



Rice, Pasta and Noodles in Croatia

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Stable demand for everyday staples

INDUSTRY PERFORMANCE

Modest growth supported by price effects, stable demand and promotions
Chilled pasta's dynamism reflects consumers' growing appetite for premium, locally produced, and convenient meal solutions

WHAT'S NEXT?

Modest value growth supported by innovation and stable consumption patterns
Growing consumer preference for natural, local, and nutritionally enriched foods

COMPETITIVE LANDSCAPE

Barilla Holding leads pasta, while Riso Scotti leads rice
Marodi strengthens its position by successfully blending heritage-based marketing with modern health-oriented innovation

CHANNELS

Supermarkets provide a wide range of price and quality options
Continued expansion of online grocery platforms

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EXECUTIVE SUMMARY

Moderate growth supported by stable demand, health-oriented innovation, and local supply development

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Private label expansion as economic pressure persists

High global sugar and cocoa prices present challenges for sweet staples

Health and sustainability trends advance

WHAT'S NEXT?

Stable demand, tourism growth and a gradual recovery of purchasing power ensure steady growth

Companies focus on efficiency, innovation, and credibility

Supermarkets and discounters to maintain their dominance

COMPETITIVE LANDSCAPE

Fortenova remained the undisputed leader, combining scale, brand recognition, and distribution strength

Delta Holding SA's strong growth fuelled by its healthy positioning, improved store visibility and affordable pricing

Strong preference for Croatian products

CHANNELS

Supermarkets lead, expanding their private label ranges and strengthening their image as price-conscious, consumer-oriented retailers

E-commerce expansion as major supermarket chains invest in improving digital platforms, delivery logistics, and integration between online and offline promotions

Discounters benefit from consumers' heightened focus on value and price transparency

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