



# Coffee in North Macedonia

December 2025

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## Coffee in North Macedonia - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Degree of premiumisation, as inflation eases

#### INDUSTRY PERFORMANCE

Positive growth in 2025

Fresh ground coffee pods gain most value share, while instant coffee also performs well

#### WHAT'S NEXT

Positive outlook over forecast period

Growing coffee culture boosts foodservice

Sustainability moving higher up agenda

#### COMPETITIVE LANDSCAPE

Atlantic Trade holds on to tight lead

Illycaffè gains most value share

#### CHANNELS

Small local grocers continue to dominate, though retail e-commerce makes most gains

Volume sales sizeable through foodservice

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### EXECUTIVE SUMMARY

Positive growth, due to higher consumer confidence

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Positive picture overall

Price continues to drive sales

Health and wellness also a significant factor

#### WHAT'S NEXT?

Modest growth over forecast period

Focus on healthier positioning with tea and other hot drinks

Growing focus on sustainability

## COMPETITIVE LANDSCAPE

Nestlé holds on to commanding lead, supported by a wide product portfolio

Illycaffè gains most value share

## CHANNELS

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