



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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Hot Drinks in North Macedonia - Industry Overview

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

Small local grocers continue to dominate

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