



Hot Drinks in North Macedonia

December 2025

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Hot Drinks in North Macedonia

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

Retail e-commerce gains most value share

Foodservice vs retail split

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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

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CHANNELS

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

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[Tea in North Macedonia](#)

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

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Fruit/herbal tea registers highest value growth

WHAT'S NEXT?

Continuing growth over forecast period

Concern for the environment moves higher up the agenda

Stricter regulations being implemented

COMPETITIVE LANDSCAPE

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CHANNELS

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Some volume growth, in spite of population decline

Rising popularity of pods and capsules

WHAT'S NEXT?

Muted constant value growth over forecast period

Degree of premiumisation

Stricter regulation improves quality

COMPETITIVE LANDSCAPE

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