



Other Hot Drinks in North Macedonia

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Chocolate-based flavoured powder drinks still only significant offering

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

Nestlé holds on to commanding lead

Second-placed Kraškomerc gains most value share

CHANNELS

Small local grocers continue to dominate

Retail e-commerce gains most value share

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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

Retail e-commerce gains most value share

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