



# Staple Foods in Croatia

November 2025

Table of Contents

## Staple Foods in Croatia

### 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

#### MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2020-2025

Table 2 - Sales of Staple Foods by Category: Value 2020-2025

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 4 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 6 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 7 - Penetration of Private Label by Category: % Value 2021-2025

Table 8 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 10 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

#### COUNTRY REPORTS DISCLAIMER

#### SOURCES

Summary 1 - Research Sources

Baked Goods in Croatia

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Rising influence of health and wellness concerns

#### INDUSTRY PERFORMANCE

Higher prices and rising interest in more differentiated products drive value growth in 2025

Freshly baked items remain a cornerstone of Croatia's everyday food culture

#### WHAT'S NEXT?

Nominal growth driven by inflation and trading-up to more specialised products

Rising influence of health and wellness considerations

Expanded list of controlled food items

#### COMPETITIVE LANDSCAPE

Mlinar leads thanks to its nationwide reach, brand strength, investment-backed expansion, and continuous innovation

Mondelez benefits from its strong position in packaged sweet bakery products

#### CHANNELS

Convenience stores and discounters capture growth from changing shopping habits and price sensitivity

E-commerce benefits from the growing digitalisation of grocery retail and consumer preference for convenience

#### CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2020-2025

Table 14 - Sales of Baked Goods by Category: Value 2020-2025

Table 15 - Sales of Baked Goods by Category: % Volume Growth 2020-2025

Table 16 - Sales of Baked Goods by Category: % Value Growth 2020-2025

Table 17 - Sales of Pastries by Type: % Value 2020-2025

Table 18 - NBO Company Shares of Baked Goods: % Value 2021-2025

Table 19 - LBN Brand Shares of Baked Goods: % Value 2022-2025

Table 20 - Distribution of Baked Goods by Format: % Value 2020-2025

Table 21 - Forecast Sales of Baked Goods by Category: Volume 2025-2030

Table 22 - Forecast Sales of Baked Goods by Category: Value 2025-2030

Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030

Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

#### COUNTRY REPORTS DISCLAIMER

[Breakfast Cereals in Croatia](#)

#### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Rising demand for healthy and indulgent options

#### INDUSTRY PERFORMANCE

Food inflation and higher production costs drive value growth in 2025

Rising interest in less processed, natural breakfast options

#### WHAT'S NEXT?

Innovation, health-oriented positioning, and improved distribution support ongoing demand

Health and wellness trend is encouraging reformulation, product innovation, and the emergence of less processed alternatives

Sustainability to strengthen through to 2030

#### COMPETITIVE LANDSCAPE

Nestlé maintains its leadership through effective brand management and continued consumer engagement

Polarisation: strong performance of both affordable, everyday products and healthier, functionally positioned alternatives

#### CHANNELS

Inflation keeps consumers focused on price and value

E-commerce's expansion driven by the increasing availability of online grocery platforms

## CATEGORY DATA

- Table 25 - Sales of Breakfast Cereals by Category: Volume 2020-2025
- Table 26 - Sales of Breakfast Cereals by Category: Value 2020-2025
- Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2020-2025
- Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2020-2025
- Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2021-2025
- Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2022-2025
- Table 31 - Distribution of Breakfast Cereals by Format: % Value 2020-2025
- Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2025-2030
- Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2025-2030
- Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2025-2030
- Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

[Processed Fruit and Vegetables in Croatia](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Persistent cost-of-living pressures encourage consumers to seek affordable options

### INDUSTRY PERFORMANCE

Strengthening preference for locally produced and natural products

Sustained demand for tomato-based products, canned peas, pickled vegetables, and mixed vegetable products

### WHAT'S NEXT?

Gains from pricing and gradual trading-up rather than strong volume expansion

Health and wellness developments

Sustainability will remain a central pillar

### COMPETITIVE LANDSCAPE

Leđo's decisive lead supported by strong brand recognition and alignment with consumer demand for affordable and healthy convenience foods

Podravka expands capacity, strengthens local sourcing and enhances operational sustainability in 2025

## CHANNELS

Supermarkets offer affordability, convenience, and variety

E-commerce expands through convenience, speed, and service flexibility

## CATEGORY DATA

- Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025
- Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025
- Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025
- Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025
- Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025
- Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025
- Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025
- Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025
- Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030
- Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030
- Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030
- Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

## Processed Meat, Seafood and Alternatives To Meat in Croatia

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Diversification of consumer preferences in 2025

#### INDUSTRY PERFORMANCE

Value sales supported by price growth and the category's continued importance

Rising consumer interest in plant-based and flexitarian diets

#### WHAT'S NEXT?

Market to remain robust, driven by steady demand, investment in production technology, and diversification into healthier, premium, and sustainable areas

Move toward a more balanced and diversified protein market

Technological advancements strengthen competitiveness and reduce environmental impact

#### COMPETITIVE LANDSCAPE

Technological investment, scale, and strong brand recognition secure Pik Vrbovec's leading position

Fortenova Grupa dd's dynamism driven by sustained consumer trust in domestic brands and modernisation efforts

#### CHANNELS

Major supermarket chains have extensive refrigerated and deli sections, ensuring wide accessibility

Supermarkets and e-commerce are the key growth engines of distribution in 2025

#### CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

#### COUNTRY REPORTS DISCLAIMER

## Rice, Pasta and Noodles in Croatia

### 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

## CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025  
Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025  
Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025  
Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025  
Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025  
Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025  
Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025  
Table 69 - NBO Company Shares of Rice: % Value 2021-2025  
Table 70 - LBN Brand Shares of Rice: % Value 2022-2025  
Table 71 - NBO Company Shares of Pasta: % Value 2021-2025  
Table 72 - LBN Brand Shares of Pasta: % Value 2022-2025  
Table 73 - NBO Company Shares of Noodles: % Value 2021-2025  
Table 74 - LBN Brand Shares of Noodles: % Value 2022-2025  
Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025  
Table 76 - Distribution of Rice by Format: % Value 2020-2025  
Table 77 - Distribution of Pasta by Format: % Value 2020-2025  
Table 78 - Distribution of Noodles by Format: % Value 2020-2025  
Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030  
Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030  
Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030  
Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

