



# Staple Foods in Croatia

November 2025

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## 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

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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

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

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#### 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

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## 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

Ledo'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

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### 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

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## 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

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