



**Euromonitor
International**

Processed Meat, Seafood and Alternatives To Meat in Croatia

November 2025

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

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Staple Foods in Croatia - Industry Overview

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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