



Tea in Serbia

January 2026

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Value sales of tea maintain low positive growth, while volume sales remain in a slump

INDUSTRY PERFORMANCE

Sales of tea continue to be challenged by seasonal demand, while more emergent categories support growth
Strong cultural tradition and health trends support the growth of herbal teas

WHAT'S NEXT?

Stronger sales of tea will continue to be challenged over the forecast period
Innovation expected in functional teas, with global trends likely to gradually influence further developments
Brand competition will remain price-focussed over the forecast period

COMPETITIVE LANDSCAPE

Fructus maintains lead as the strongest brand across black, fruit/herbal, and green tea
Krüger enjoys dynamic growth to take first brand place in instant tea

CHANNELS

Small local grocers continue to benefit from consumer demand for quick and frequent shopping trips
Retail e-commerce continues to emerge from a low base

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Hot Drinks in Serbia - Industry Overview

EXECUTIVE SUMMARY

Price-sensitive consumers seek discounts and promotions midst high prices for coffee and cocoa

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Market polarisation seen, with elements of premiumisation continuing
Sustainability continues to rise as a key trend, affecting packaging formats
Convenience and demand for on-the-go consumption boost interest in hot drinks pods

WHAT'S NEXT?

Retail volume sales of hot drinks expected to return to sub-decimal growth, although competition from foodservice may rise
Price sensitivity will continue to affect consumer behaviour, benefitting budget brands and private label
Health and wellness trends, premiumisation, and personalisation will inspire new product developments

COMPETITIVE LANDSCAPE

Atlantic Grupa (GBO) benefits from popular selection of coffee brands with strong distribution across the country

Krüger enjoys dynamic growth to take first brand place in instant tea

CHANNELS

Supermarkets maintains place as the leading distribution channel, thanks to offering the widest ranges of products and brands

Discounters benefit from a growing number of stores, while e-commerce continues to emerge

Foodservice vs retail split

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