



**Euromonitor
International**

Snacks in Croatia

July 2025

Table of Contents

Snacks in Croatia

EXECUTIVE SUMMARY

Snacks in 2025: The big picture

Key trends in 2025

Competitive landscape

Channel developments

What next for snacks?

MARKET DATA

Table 1 - Sales of Snacks by Category: Volume 2020-2025

Table 2 - Sales of Snacks by Category: Value 2020-2025

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

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

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

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

Table 7 - Penetration of Private Label by Category: % Value 2020-2025

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

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

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

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

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

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Chocolate Confectionery in Croatia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Price hikes drive value growth

Kaufland emerges as the fastest-growing player in chocolate confectionery

Supermarket chains remain dominant, but discounters show strongest momentum

PROSPECTS AND OPPORTUNITIES

Modest growth amid persistent high prices

Digital innovation will drive growth

Greater focus on sustainability amid new EU Regulations and rising consumer expectations

CATEGORY DATA

Table 13 - Sales of Chocolate Confectionery by Category: Volume 2020-2025

Table 14 - Sales of Chocolate Confectionery by Category: Value 2020-2025

Table 15 - Sales of Chocolate Confectionery by Category: % Volume Growth 2020-2025

Table 16 - Sales of Chocolate Confectionery by Category: % Value Growth 2020-2025

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

Table 18 - NBO Company Shares of Chocolate Confectionery: % Value 2021-2025

Table 19 - LBN Brand Shares of Chocolate Confectionery: % Value 2022-2025

Table 20 - Distribution of Chocolate Confectionery by Format: % Value 2020-2025

Table 21 - Forecast Sales of Chocolate Confectionery by Category: Volume 2025-2030

Table 22 - Forecast Sales of Chocolate Confectionery by Category: Value 2025-2030

Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2025-2030

Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2025-2030

Gum in Croatia

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Chewing gum continues to dominate sales
- Wrigley Jr Co. maintains leadership
- Traditional retail leads gum distribution, while e-commerce shows fastest growth

PROSPECTS AND OPPORTUNITIES

- Gum sales in Croatia show limited potential for volume growth amid market maturity
- Innovations in packaging, formats, and health-focused formulations will shape market development
- Rise of smoking alternatives poses challenge to gum market

CATEGORY DATA

- Table 25 - Sales of Gum by Category: Volume 2020-2025
- Table 26 - Sales of Gum by Category: Value 2020-2025
- Table 27 - Sales of Gum by Category: % Volume Growth 2020-2025
- Table 28 - Sales of Gum by Category: % Value Growth 2020-2025
- Table 29 - Sales of Gum by Flavour: Rankings 2020-2025
- Table 30 - NBO Company Shares of Gum: % Value 2021-2025
- Table 31 - LBN Brand Shares of Gum: % Value 2022-2025
- Table 32 - Distribution of Gum by Format: % Value 2020-2025
- Table 33 - Forecast Sales of Gum by Category: Volume 2025-2030
- Table 34 - Forecast Sales of Gum by Category: Value 2025-2030
- Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2025-2030
- Table 36 - Forecast Sales of Gum by Category: % Value Growth 2025-2030

Sugar Confectionery in Croatia

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Sugar confectionery sees modest growth, driven by health-focused innovation
- Kraš continues to lead sales
- Supermarket chains retain their dominance while e-commerce gains traction

PROSPECTS AND OPPORTUNITIES

- Flat performance expected, as sugar confectionery approaches maturity
- Health and sustainability trends will drive product innovation
- Digitalisation is poised to transform production and logistics

CATEGORY DATA

- Table 37 - Sales of Sugar Confectionery by Category: Volume 2020-2025
- Table 38 - Sales of Sugar Confectionery by Category: Value 2020-2025
- Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2020-2025
- Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2020-2025
- Table 41 - Sales of Chewy Candies by Type: % Value 2020-2025
- Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2021-2025
- Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2022-2025
- Table 44 - Distribution of Sugar Confectionery by Format: % Value 2020-2025
- Table 45 - Forecast Sales of Sugar Confectionery by Category: Volume 2025-2030

Table 46 - Forecast Sales of Sugar Confectionery by Category: Value 2025-2030

Table 47 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2025-2030

Table 48 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2025-2030

Ice Cream in Croatia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Premiumisation and revival of tourism are driving ice cream sales

Ledo continues to dominate sales

E-commerce remains niche channel, despite strong growth

PROSPECTS AND OPPORTUNITIES

Strong continued demand for ice cream, boosted by expanded distribution

Innovation and digital engagement will drive growth

Multipacks will gain traction

CATEGORY DATA

Table 49 - Sales of Ice Cream by Category: Volume 2020-2025

Table 50 - Sales of Ice Cream by Category: Value 2020-2025

Table 51 - Sales of Ice Cream by Category: % Volume Growth 2020-2025

Table 52 - Sales of Ice Cream by Category: % Value Growth 2020-2025

Table 53 - Sales of Ice Cream by Leading Flavours: Rankings 2020-2025

Table 54 - Sales of Impulse Ice Cream by Format: % Value 2020-2025

Table 55 - NBO Company Shares of Ice Cream: % Value 2021-2025

Table 56 - LBN Brand Shares of Ice Cream: % Value 2022-2025

Table 57 - NBO Company Shares of Impulse Ice Cream: % Value 2021-2025

Table 58 - LBN Brand Shares of Impulse Ice Cream: % Value 2022-2025

Table 59 - NBO Company Shares of Take-home Ice Cream: % Value 2021-2025

Table 60 - LBN Brand Shares of Take-home Ice Cream: % Value 2022-2025

Table 61 - Distribution of Ice Cream by Format: % Value 2020-2025

Table 62 - Forecast Sales of Ice Cream by Category: Volume 2025-2030

Table 63 - Forecast Sales of Ice Cream by Category: Value 2025-2030

Table 64 - Forecast Sales of Ice Cream by Category: % Volume Growth 2025-2030

Table 65 - Forecast Sales of Ice Cream by Category: % Value Growth 2025-2030

Savoury Snacks in Croatia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Emergence of lighter, healthier options and recovery of tourism fuel growth

Adria Snack leads sales while Mogyi gains ground on back of healthy snacking trend

Supermarkets lead sales as e-commerce gains traction

PROSPECTS AND OPPORTUNITIES

Innovation and health trends to drive steady growth

Technological advancements and innovation-led strategies bode well for future growth

Sustainability will take centre stage

CATEGORY DATA

Table 66 - Sales of Savoury Snacks by Category: Volume 2020-2025

Table 67 - Sales of Savoury Snacks by Category: Value 2020-2025

Table 68 - Sales of Savoury Snacks by Category: % Volume Growth 2020-2025

Table 69 - Sales of Savoury Snacks by Category: % Value Growth 2020-2025

Table 70 - NBO Company Shares of Savoury Snacks: % Value 2021-2025

Table 71 - LBN Brand Shares of Savoury Snacks: % Value 2022-2025

Table 72 - Distribution of Savoury Snacks by Format: % Value 2020-2025

Table 73 - Forecast Sales of Savoury Snacks by Category: Volume 2025-2030

Table 74 - Forecast Sales of Savoury Snacks by Category: Value 2025-2030

Table 75 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2025-2030

Table 76 - Forecast Sales of Savoury Snacks by Category: % Value Growth 2025-2030

Sweet Biscuits, Snack Bars and Fruit Snacks in Croatia

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Market shows resilience, despite price pressures
- Kraš retains dominant position while Bite me Nutrition benefits from growing health and sustainability trends
- E-commerce gains traction from low base

PROSPECTS AND OPPORTUNITIES

- Buoyant tourism industry will support steady demand
- Technological advancements will drive production capacity
- Health and sustainability will become key areas of focus

CATEGORY DATA

Table 77 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2020-2025

Table 78 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2020-2025

Table 79 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2020-2025

Table 80 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2020-2025

Table 81 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2021-2025

Table 82 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2022-2025

Table 83 - NBO Company Shares of Sweet Biscuits: % Value 2021-2025

Table 84 - LBN Brand Shares of Sweet Biscuits: % Value 2022-2025

Table 85 - NBO Company Shares of Snack Bars: % Value 2021-2025

Table 86 - LBN Brand Shares of Snack Bars: % Value 2022-2025

Table 87 - NBO Company Shares of Fruit Snacks: % Value 2021-2025

Table 88 - LBN Brand Shares of Fruit Snacks: % Value 2022-2025

Table 89 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2020-2025

Table 90 - Distribution of Sweet Biscuits by Format: % Value 2020-2025

Table 91 - Distribution of Snack Bars by Format: % Value 2020-2025

Table 92 - Distribution of Fruit Snacks by Format: % Value 2020-2025

Table 93 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2025-2030

Table 94 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2025-2030

Table 95 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2025-2030

Table 96 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2025-2030

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.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/snacks-in-croatia/report.