



Euromonitor
International

Cooking Ingredients and Meals in Croatia

November 2025

Table of Contents

EXECUTIVE SUMMARY

Sales benefit from unit price stabilisation

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Trade dynamics and input volatility shape the competitive landscape

Tourism boosts shelf-stable meals and convenience lines

Quality control and provenance gain importance

WHAT'S NEXT?

Steady growth outlook led by sauces, meals and convenience innovation

Domestic production investments reinforce competitiveness

Modern retail and digital fulfilment drive future channel dynamics

COMPETITIVE LANDSCAPE

Podravka consolidates leadership through investment and innovation

Fortenova Grupa drives fastest growth through pricing strategy and brand agility

Private label performance remains mixed but strategically important

CHANNELS

Supermarkets consolidate leadership through range, promotions and tourist reach

E-commerce accelerates as digital habits deepen

Retail outperforms foodservice as at-home and tourist consumption dominate

MARKET DATA

Table 1 - Sales of Cooking Ingredients and Meals by Category: Volume 2020-2025

Table 2 - Sales of Cooking Ingredients and Meals by Category: Value 2020-2025

Table 3 - Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2020-2025

Table 4 - Sales of Cooking Ingredients and Meals by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Cooking Ingredients and Meals: % Value 2021-2025

Table 6 - LBN Brand Shares of Cooking Ingredients and Meals: % Value 2022-2025

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

Table 8 - Distribution of Cooking Ingredients and Meals by Format: % Value 2020-2025

Table 9 - Forecast Sales of Cooking Ingredients and Meals by Category: Volume 2025-2030

Table 10 - Forecast Sales of Cooking Ingredients and Meals by Category: Value 2025-2030

Table 11 - Forecast Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Cooking Ingredients and Meals by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Edible Oils in Croatia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health and provenance key factors for consumers

INDUSTRY PERFORMANCE

Olive oil retains premium leadership despite easing prices

WHAT'S NEXT?

Steady value gains expected as pricing stabilises and local capacity strengthens

Health and wellness continue to define consumer priorities

Policy measures and origin protection reinforce stability and trust

COMPETITIVE LANDSCAPE

Zvijezda consolidates leadership through scale, pricing and wellness positioning

Fortenova Grupa emerges as the most dynamic player through private label expansion

CHANNELS

Supermarkets dominate as price, range and convenience align

E-commerce gains traction as producers and tourists drive online repeat sales

CATEGORY DATA

Table 13 - Sales of Edible Oils by Category: Volume 2020-2025

Table 14 - Sales of Edible Oils by Category: Value 2020-2025

Table 15 - Sales of Edible Oils by Category: % Volume Growth 2020-2025

Table 16 - Sales of Edible Oils by Category: % Value Growth 2020-2025

Table 17 - NBO Company Shares of Edible Oils: % Value 2021-2025

Table 18 - LBN Brand Shares of Edible Oils: % Value 2022-2025

Table 19 - Distribution of Edible Oils by Format: % Value 2020-2025

Table 20 - Forecast Sales of Edible Oils by Category: Volume 2025-2030

Table 21 - Forecast Sales of Edible Oils by Category: Value 2025-2030

Table 22 - Forecast Sales of Edible Oils by Category: % Volume Growth 2025-2030

Table 23 - Forecast Sales of Edible Oils by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Meals and Soups in Croatia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Demand for convenient products with a long shelf-life benefits sales

INDUSTRY PERFORMANCE

Broader convenience trend and upgraded formulations drive category expansion

Shelf-stable ready meals set the pace for value growth

WHAT'S NEXT?

Stable expansion expected as convenience, health and tourism continue to reinforce demand

Health and wellness continue to shape product innovation and consumer preferences

Digitalisation and smart manufacturing to accelerate innovation cycles

COMPETITIVE LANDSCAPE

Podravka strengthens leadership through breadth, innovation and digital engagement

Lidl Hrvatska gains share through price leadership and tourist familiarity

CHANNELS

Supermarkets dominate as range depth and accessibility drive value share

Online retail gains momentum as pantry formats suit delivery and reordering

CATEGORY DATA

Table 24 - Sales of Meals and Soups by Category: Volume 2020-2025

Table 25 - Sales of Meals and Soups by Category: Value 2020-2025

Table 26 - Sales of Meals and Soups by Category: % Volume Growth 2020-2025

Table 27 - Sales of Meals and Soups by Category: % Value Growth 2020-2025

Table 28 - NBO Company Shares of Meals and Soups: % Value 2021-2025

Table 29 - LBN Brand Shares of Meals and Soups: % Value 2022-2025

Table 30 - Distribution of Meals and Soups by Format: % Value 2020-2025

Table 31 - Forecast Sales of Meals and Soups by Category: Volume 2025-2030

Table 32 - Forecast Sales of Meals and Soups by Category: Value 2025-2030

Table 33 - Forecast Sales of Meals and Soups by Category: % Volume Growth 2025-2030

Table 34 - Forecast Sales of Meals and Soups by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Sauces, Dips and Condiments in Croatia

KEY DATA FINDINGS

2025 DEVELOPMENTS

More stable pricing with growth supported by innovation

INDUSTRY PERFORMANCE

Promotional intensity limits value upside as innovation broadens the offer

Mustard emerges as the most dynamic growth contributor in 2025

WHAT'S NEXT?

Steady, innovation-led growth expected as pricing stabilises and quality improves

Health and wellness trends centre on simpler, cleaner formulations

Processing and packaging upgrades transform production efficiency and sustainability

COMPETITIVE LANDSCAPE

Zvijezda consolidates leadership through portfolio strength and disciplined pricing

Podravka delivers fastest growth on innovation and capacity expansion

CHANNELS

Supermarkets dominate as range depth and promotional activity anchor sales

Online retail accelerates as convenience and discoverability enhance penetration

CATEGORY DATA

Table 35 - Sales of Sauces, Dips and Condiments by Category: Volume 2020-2025

Table 36 - Sales of Sauces, Dips and Condiments by Category: Value 2020-2025

Table 37 - Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2020-2025

Table 38 - Sales of Sauces, Dips and Condiments by Category: % Value Growth 2020-2025

Table 39 - Sales of Liquid Recipe Sauces by Type: % Value 2020-2025

Table 40 - NBO Company Shares of Sauces, Dips and Condiments: % Value 2021-2025

Table 41 - LBN Brand Shares of Sauces, Dips and Condiments: % Value 2022-2025

Table 42 - Distribution of Sauces, Dips and Condiments by Format: % Value 2020-2025

Table 43 - Forecast Sales of Sauces, Dips and Condiments by Category: Volume 2025-2030

Table 44 - Forecast Sales of Sauces, Dips and Condiments by Category: Value 2025-2030

Table 45 - Forecast Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2025-2030

Table 46 - Forecast Sales of Sauces, Dips and Condiments by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Sweet Spreads in Croatia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Tourist demand and shift away from home production boost sales

INDUSTRY PERFORMANCE

Jams and preserves outperform as affordability and convenience drive usage

WHAT'S NEXT?

Continued category expansion driven by fruit-forward innovation and steady breakfast habits

Health and wellness trends favour naturalness and simple, recognisable ingredients

Regulatory reform to raise transparency and quality benchmarks across the category

COMPETITIVE LANDSCAPE

Podravka consolidates leadership through breadth, innovation and brand heritage

Private label and regional premium players gain momentum through affordability and authenticity

CHANNELS

Supermarkets dominate as core breakfast and snacking occasions drive sales

E-commerce accelerates as repeat orders and tourism extend reach

CATEGORY DATA

Table 47 - Sales of Sweet Spreads by Category: Volume 2020-2025

Table 48 - Sales of Sweet Spreads by Category: Value 2020-2025

Table 49 - Sales of Sweet Spreads by Category: % Volume Growth 2020-2025

Table 50 - Sales of Sweet Spreads by Category: % Value Growth 2020-2025

Table 51 - NBO Company Shares of Sweet Spreads: % Value 2021-2025

Table 52 - LBN Brand Shares of Sweet Spreads: % Value 2022-2025

Table 53 - Distribution of Sweet Spreads by Format: % Value 2020-2025

Table 54 - Forecast Sales of Sweet Spreads by Category: Volume 2025-2030

Table 55 - Forecast Sales of Sweet Spreads by Category: Value 2025-2030

Table 56 - Forecast Sales of Sweet Spreads by Category: % Volume Growth 2025-2030

Table 57 - Forecast Sales of Sweet Spreads 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.

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