

Beer in Croatia

June 2023

Table of Contents

Beer in Croatia - Category analysis

KEY DATA FINDINGS

2022 DEVELOPMENTS

Recovery of tourism drives on-trade growth in 2022

Top three brewers maintain their lead, while small and independent breweries struggle due to rising prices Non/low alcoholic beer and craft beer impacted by price rises and limited distribution, respectively

PROSPECTS AND OPPORTUNITIES

Increasing price-sensitivity will encourage shift to economy and mid-priced beer Rising cost of raw materials due to war in Ukraine and COVID-19

Breweries to focus on lower strength beer

CATEGORY BACKGROUND

Lager price band methodology

Summary 1 - Lager by Price Band 2022

Table 1 - Number of Breweries 2017-2022

CATEGORY DATA

Table 2 - Sales of Beer by Category: Total Volume 2017-2022

Table 3 - Sales of Beer by Category: Total Value 2017-2022

Table 4 - Sales of Beer by Category: % Total Volume Growth 2017-2022

Table 5 - Sales of Beer by Category: % Total Value Growth 2017-2022

Table 6 - Sales of Beer by Off-trade vs On-trade: Volume 2017-2022

Table 7 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022

Table 8 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 9 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022

Table 10 - GBO Company Shares of Beer: % Total Volume 2018-2022

Table 11 - NBO Company Shares of Beer: % Total Volume 2018-2022

Table 12 - LBN Brand Shares of Beer: % Total Volume 2019-2022

Table 13 - Forecast Sales of Beer by Category: Total Volume 2022-2027

Table 14 - Forecast Sales of Beer by Category: Total Value 2022-2027

Table 15 - Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027

Table 16 - Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

Alcoholic Drinks in Croatia - Industry Overview

EXECUTIVE SUMMARY

Alcoholic drinks in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

TAXATION AND DUTY LEVIES

Summary 2 - Taxation and Duty Levies on Alcoholic Drinks 2022

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 17 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

MARKET DATA

- Table 18 Sales of Alcoholic Drinks by Category: Total Volume 2017-2022
- Table 19 Sales of Alcoholic Drinks by Category: Total Value 2017-2022
- Table 20 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022
- Table 21 Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022
- Table 22 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022
- Table 23 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022
- Table 24 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022
- Table 25 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022
- Table 26 GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022
- Table 27 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022
- Table 28 Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022
- Table 29 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027
- Table 30 Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027
- Table 31 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027
- Table 32 Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 3 - Research Sources

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 focusing 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.