



Sweet Spreads in Croatia

November 2025

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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

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Supermarkets dominate as core breakfast and snacking occasions drive sales

E-commerce accelerates as repeat orders and tourism extend reach

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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

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