

# Dairy Products and Alternatives in Croatia

September 2023

Table of Contents

## Dairy Products and Alternatives in Croatia

### EXECUTIVE SUMMARY

Dairy products and alternatives in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for dairy products and alternatives?

### MARKET DATA

Table 1 - Sales of Dairy Products and Alternatives by Category: Value 2018-2023

Table 2 - Sales of Dairy Products and Alternatives by Category: % Value Growth 2018-2023

Table 3 - NBO Company Shares of Dairy Products and Alternatives: % Value 2019-2023

Table 4 - LBN Brand Shares of Dairy Products and Alternatives: % Value 2020-2023

Table 5 - Penetration of Private Label by Category: % Value 2018-2023

Table 6 - Distribution of Dairy Products and Alternatives by Format: % Value 2018-2023

Table 7 - Forecast Sales of Dairy Products and Alternatives by Category: Value 2023-2028

Table 8 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Baby Food in Croatia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Stagnant volume performance as retail prices increase

Organic baby food shows promising growth as private labels roll out their own variants

Baby food players shift more advertising online

### PROSPECTS AND OPPORTUNITIES

Demographic shifts pose long term risk for baby food

Functional baby foods and health claims to expand

E-commerce growth potential is high in baby food

### CATEGORY DATA

Table 9 - Sales of Baby Food by Category: Volume 2018-2023

Table 10 - Sales of Baby Food by Category: Value 2018-2023

Table 11 - Sales of Baby Food by Category: % Volume Growth 2018-2023

Table 12 - Sales of Baby Food by Category: % Value Growth 2018-2023

Table 13 - NBO Company Shares of Baby Food: % Value 2019-2023

Table 14 - LBN Brand Shares of Baby Food: % Value 2020-2023

Table 15 - Distribution of Baby Food by Format: % Value 2018-2023

Table 16 - Forecast Sales of Baby Food by Category: Volume 2023-2028

Table 17 - Forecast Sales of Baby Food by Category: Value 2023-2028

Table 18 - Forecast Sales of Baby Food by Category: % Volume Growth 2023-2028

Table 19 - Forecast Sales of Baby Food by Category: % Value Growth 2023-2028

## Butter and Spreads in Croatia

### KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Margarine declines in popularity, as consumers favour butter  
Butter and spreads witness stable volume sales  
Growing interest in lactose free butter

## PROSPECTS AND OPPORTUNITIES

Further price rises anticipated in edible oil  
Ghee is increasingly on the cook's menu  
Lactose-free options to gain further appeal

## CATEGORY DATA

Table 20 - Sales of Butter and Spreads by Category: Volume 2018-2023  
Table 21 - Sales of Butter and Spreads by Category: Value 2018-2023  
Table 22 - Sales of Butter and Spreads by Category: % Volume Growth 2018-2023  
Table 23 - Sales of Butter and Spreads by Category: % Value Growth 2018-2023  
Table 24 - NBO Company Shares of Butter and Spreads: % Value 2019-2023  
Table 25 - LBN Brand Shares of Butter and Spreads: % Value 2020-2023  
Table 26 - Distribution of Butter and Spreads by Format: % Value 2018-2023  
Table 27 - Forecast Sales of Butter and Spreads by Category: Volume 2023-2028  
Table 28 - Forecast Sales of Butter and Spreads by Category: Value 2023-2028  
Table 29 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2023-2028  
Table 30 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2023-2028

## Cheese in Croatia

## KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Lactose-free cheese gains mainstream appeal  
Grilling cheese gains popularity post-pandemic  
Cheese prices escalate amid economic problems

## PROSPECTS AND OPPORTUNITIES

Cost issues will remain a pressing concern  
Rebound in foodservice volume sales tapers off in 2023  
Convenience trend drives a revival in demand for processed cheese excluding spreadable

## CATEGORY DATA

Table 31 - Sales of Cheese by Category: Volume 2018-2023  
Table 32 - Sales of Cheese by Category: Value 2018-2023  
Table 33 - Sales of Cheese by Category: % Volume Growth 2018-2023  
Table 34 - Sales of Cheese by Category: % Value Growth 2018-2023  
Table 35 - Sales of Spreadable Processed Cheese by Type: % Value 2018-2023  
Table 36 - NBO Company Shares of Cheese: % Value 2019-2023  
Table 37 - LBN Brand Shares of Cheese: % Value 2020-2023  
Table 38 - Distribution of Cheese by Format: % Value 2018-2023  
Table 39 - Forecast Sales of Cheese by Category: Volume 2023-2028  
Table 40 - Forecast Sales of Cheese by Category: Value 2023-2028  
Table 41 - Forecast Sales of Cheese by Category: % Volume Growth 2023-2028  
Table 42 - Forecast Sales of Cheese by Category: % Value Growth 2023-2028

## Drinking Milk Products in Croatia

## KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Croatians choose to buy local where possible  
Private label makes gains in drinking milk products  
Sustainability issue remains a key issue for manufacturers

## PROSPECTS AND OPPORTUNITIES

Modest growth prospects ahead for drinking milk products  
Dairy farmers to experience surge in costs and sourcing issues  
Organic milk production expected to rise

## CATEGORY DATA

Table 43 - Sales of Drinking Milk Products by Category: Volume 2018-2023  
Table 44 - Sales of Drinking Milk Products by Category: Value 2018-2023  
Table 45 - Sales of Drinking Milk Products by Category: % Volume Growth 2018-2023  
Table 46 - Sales of Drinking Milk Products by Category: % Value Growth 2018-2023  
Table 47 - NBO Company Shares of Drinking Milk Products: % Value 2019-2023  
Table 48 - LBN Brand Shares of Drinking Milk Products: % Value 2020-2023  
Table 49 - Distribution of Drinking Milk Products by Format: % Value 2018-2023  
Table 50 - Forecast Sales of Drinking Milk Products Products by Category: Volume 2023-2028  
Table 51 - Forecast Sales of Drinking Milk Products Products by Category: Value 2023-2028  
Table 52 - Forecast Sales of Drinking Milk Products Products by Category: % Volume Growth 2023-2028  
Table 53 - Forecast Sales of Drinking Milk Products Products by Category: % Value Growth 2023-2028

## Yoghurt and Sour Milk Products in Croatia

## KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Yoghurt is enjoyed for its versatility and nutritional benefits  
Consumers seek out higher quality and healthier products  
Soaring prices drives consumers towards private label

## PROSPECTS AND OPPORTUNITIES

Health concerns will play stronger role in consumers' purchasing decisions  
Drinking yoghurt poised for strong growth  
Inflation will leave its mark as consumers continue to economise

## CATEGORY DATA

Table 54 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2018-2023  
Table 55 - Sales of Yoghurt and Sour Milk Products by Category: Value 2018-2023  
Table 56 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2018-2023  
Table 57 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2018-2023  
Table 58 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2019-2023  
Table 59 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2020-2023  
Table 60 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2018-2023  
Table 61 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2023-2028  
Table 62 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2023-2028  
Table 63 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2023-2028  
Table 64 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2023-2028

## Other Dairy in Croatia

## KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Coffee whiteners and cream witness recovery in volume sales as socialising returns  
Fromage frais and quark are eaten for health benefits  
Foodservice volume sales rise but at lower rate

## PROSPECTS AND OPPORTUNITIES

Chilled snacks is a high growth category  
Opportunities to drive condensed milk and cream sales with a better-for-you proposition  
E-commerce to extend its share of sales in other dairy

## CATEGORY DATA

Table 65 - Sales of Other Dairy by Category: Volume 2018-2023  
Table 66 - Sales of Other Dairy by Category: Value 2018-2023  
Table 67 - Sales of Other Dairy by Category: % Volume Growth 2018-2023  
Table 68 - Sales of Other Dairy by Category: % Value Growth 2018-2023  
Table 69 - NBO Company Shares of Other Dairy: % Value 2019-2023  
Table 70 - LBN Brand Shares of Other Dairy: % Value 2020-2023  
Table 71 - Distribution of Other Dairy by Format: % Value 2018-2023  
Table 72 - Forecast Sales of Other Dairy by Category: Volume 2023-2028  
Table 73 - Forecast Sales of Other Dairy by Category: Value 2023-2028  
Table 74 - Forecast Sales of Other Dairy by Category: % Volume Growth 2023-2028  
Table 75 - Forecast Sales of Other Dairy by Category: % Value Growth 2023-2028

## Plant-Based Dairy in Croatia

## KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Plant-based milk sought out by affluent consumers  
Vegan marketed plant-based dairy products are in demand  
Private label is making waves in plant-based dairy

## PROSPECTS AND OPPORTUNITIES

New players expected to focus on sustainability to differentiate in plant-based dairy  
Competition from lactose-free traditional dairy products  
Plant-based cheese to become more established

## CATEGORY DATA

Table 76 - Sales of Plant-Based Dairy by Category: Value 2018-2023  
Table 77 - Sales of Plant-Based Dairy by Category: % Value Growth 2018-2023  
Table 78 - NBO Company Shares of Plant-Based Dairy: % Value 2019-2023  
Table 79 - LBN Brand Shares of Plant-Based Dairy: % Value 2020-2023  
Table 80 - Distribution of Plant-Based Dairy by Format: % Value 2018-2023  
Table 81 - Forecast Sales of Plant-Based Dairy by Category: Value 2023-2028  
Table 82 - Forecast Sales of Plant-Based Dairy by Category: % Value Growth 2023-2028

## 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/dairy-products-and-alternatives-in-croatia/report](http://www.euromonitor.com/dairy-products-and-alternatives-in-croatia/report).