



Retail in Croatia

May 2023

Table of Contents

Retail in Croatia

EXECUTIVE SUMMARY

Retail in 2022: The big picture

Informal retail

What next for retail?

MARKET DATA

Table 1 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2017-2022

Table 2 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2017-2022

Table 3 - Sales in Retail Offline by Channel: Value 2017-2022

Table 4 - Sales in Retail Offline by Channel: % Value Growth 2017-2022

Table 5 - Retail Offline Outlets by Channel: Units 2017-2022

Table 6 - Retail Offline Outlets by Channel: % Unit Growth 2017-2022

Table 7 - Retail GBO Company Shares: % Value 2018-2022

Table 8 - Retail GBN Brand Shares: % Value 2019-2022

Table 9 - Retail Offline GBO Company Shares: % Value 2018-2022

Table 10 - Retail Offline GBN Brand Shares: % Value 2019-2022

Table 11 - Retail Offline LBN Brand Shares: Outlets 2019-2022

Table 12 - Retail E-Commerce GBO Company Shares: % Value 2018-2022

Table 13 - Retail E-Commerce GBN Brand Shares: % Value 2019-2022

Table 14 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2022-2027

Table 15 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2022-2027

Table 16 - Forecast Sales in Retail Offline by Channel: Value 2022-2027

Table 17 - Forecast Sales in Retail Offline by Channel: % Value Growth 2022-2027

Table 18 - Forecast Retail Offline Outlets by Channel: Units 2022-2027

Table 19 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Grocery Retailers in Croatia

KEY DATA FINDINGS

2022 DEVELOPMENTS

Consumers' shopping behaviour shaped by inflation

Croatia adopts Euro as national currency

Konzum retains lead as traditional grocers bounce back

PROSPECTS AND OPPORTUNITIES

Inflationary pressures to remain high in grocery retailing

Consolidation expected in grocery retailing landscape

Bleak outlook over forecast period

CHANNEL DATA

Table 20 - Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022

Table 21 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022

Table 22 - Sales in Grocery Retailers by Channel: Value 2017-2022

Table 23 - Sales in Grocery Retailers by Channel: % Value Growth 2017-2022

Table 24 - Grocery Retailers Outlets by Channel: Units 2017-2022

Table 25 - Grocery Retailers Outlets by Channel: % Unit Growth 2017-2022

- Table 26 - Grocery Retailers GBO Company Shares: % Value 2018-2022
- Table 27 - Grocery Retailers GBN Brand Shares: % Value 2019-2022
- Table 28 - Grocery Retailers LBN Brand Shares: Outlets 2019-2022
- Table 29 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027
- Table 30 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027
- Table 31 - Forecast Sales in Grocery Retailers by Channel: Value 2022-2027
- Table 32 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2022-2027
- Table 33 - Forecast Grocery Retailers Outlets by Channel: Units 2022-2027
- Table 34 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027

Non-Grocery Retailers in Croatia

KEY DATA FINDINGS

2022 DEVELOPMENTS

- Consumers return to brick-and-mortar outlets
- Pet retailers ramp up store developments
- Variety and department stores see further recovery

PROSPECTS AND OPPORTUNITIES

- Retail parks open up growth potential for non-store retailing
- Price-conscious purchasing behaviour expected to prevail
- Health and beauty specialists face solid growth prospects

CHANNEL DATA

- Table 35 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022
- Table 36 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022
- Table 37 - Non-Grocery Retailers GBO Company Shares: % Value 2018-2022
- Table 38 - Non-Grocery Retailers GBN Brand Shares: % Value 2019-2022
- Table 39 - Non-Grocery Retailers LBN Brand Shares: Outlets 2019-2022
- Table 40 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027
- Table 41 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027
- Table 42 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2022-2027
- Table 43 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2022-2027
- Table 44 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2022-2027
- Table 45 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027

Direct Selling in Croatia

KEY DATA FINDINGS

2022 DEVELOPMENTS

- Growth in direct selling largely fuelled by inflation
- Health and beauty remains key focus for direct selling
- Herbalife consolidates lead in direct selling

PROSPECTS AND OPPORTUNITIES

- Direct selling under pressure as it loses further appeal
- E-commerce can be an opportunity as well as a threat
- Direct sellers may further adjust to the online space

CHANNEL DATA

- Table 46 - Direct Selling by Product: Value 2017-2022
- Table 47 - Direct Selling by Product: % Value Growth 2017-2022

Table 48 - Direct Selling GBO Company Shares: % Value 2018-2022

Table 49 - Direct Selling GBN Brand Shares: % Value 2019-2022

Table 50 - Direct Selling Forecasts by Product: Value 2022-2027

Table 51 - Direct Selling Forecasts by Product: % Value Growth 2022-2027

Retail E-Commerce in Croatia

KEY DATA FINDINGS

2022 DEVELOPMENTS

E-commerce records another record year of value growth

Food and drink is the most dynamic product category in e-commerce

Tommy competes with Konzum in online space

PROSPECTS AND OPPORTUNITIES

Healthy growth prospects as e-commerce is still in development stage

Higher e-commerce adoption will bring higher consumer expectations

Added bureaucracy could hamper growth

CHANNEL DATA

Table 52 - Retail E-Commerce by Product: Value 2017-2022

Table 53 - Retail E-Commerce by Product: % Value Growth 2017-2022

Table 54 - Retail E-Commerce GBO Company Shares: % Value 2018-2022

Table 55 - Retail E-Commerce GBN Brand Shares: % Value 2019-2022

Table 56 - Forecast Retail E-Commerce by Product: Value 2022-2027

Table 57 - Forecast Retail E-Commerce by Product: % Value Growth 2022-2027

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/retail-in-croatia/report.