



RTD Tea in Croatia

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Innovation, brand diversification, and lifestyle-led marketing support sales

INDUSTRY PERFORMANCE

Category recovery and renewed consumer engagement in 2025
Reduced sugar still RTD tea gains traction, aligning with modern wellness trends

WHAT'S NEXT?

Further market expansion with the introduction of new functional products and the reach of the e-commerce
Digital influence achieves market scale and consumer pull

COMPETITIVE LANDSCAPE

Strong brand equity, reliable supply, and consumer trust ensure Jamnica remains the clear leader in 2025
Brand innovation and niche development

CHANNELS

Supermarkets' lead supported by broad refrigerated display space
Convenience of e-commerce increasingly important for the modern consumer

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EXECUTIVE SUMMARY

Steady expansion, with rising demand in several key categories

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Innovation is faster, riskier, and more culturally embedded
Affordability reshapes competitive dynamics
Functional beverages and health benefits drive premium growth

WHAT'S NEXT?

Volume growth driven by tourism, lifestyle shifts, and continuous innovation
Both local and international producers adapt to a mature yet steadily expanding environment
Distribution to become more diversified and digitally connected

COMPETITIVE LANDSCAPE

Through a balance of tradition, innovation, and premiumisation, Jamnica secures its leading position

Diversification and functional product development drive growth of Vindija

Soft drinks becomes more competitive and diversified

CHANNELS

Supermarkets maintain their clear lead, combining scale, variety, and promotional power

Accelerating shift toward digital convenience and hybrid shopping habits

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