



Soft Drinks in Croatia

December 2025

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Soft Drinks in Croatia

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

Foodservice vs retail split

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[Bottled Water in Croatia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health and wellness trend continues to drive bottled water's appeal

INDUSTRY PERFORMANCE

Strong health trends, innovation, and sustainability initiatives drive sales in 2025

Consumers increasingly seek value-added hydration

WHAT'S NEXT?

Evolving health habits underpin the upward trajectory of bottled water

Shift toward a digitally enabled, environmentally conscious bottled water industry

Jamnica leads with its flagship Jamnica and Jana brands

Oshee's performance reflects the surging popularity of functional and vitamin-enriched waters

CHANNELS

Supermarkets offer wide product availability, price competitiveness, and convenience

E-commerce's dynamism reflects consumers' growing preference for convenience

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[Carbonates in Croatia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Modest increase despite shifting consumer preferences

INDUSTRY PERFORMANCE

Carbonates benefits from a hot summer, a strong tourist season, and new launches

Lemonade/lime combine the appeal of carbonation with a healthier and more natural image

WHAT'S NEXT?

Moderate growth supported by product diversification, tourism, and on-the-go consumption

Technological advancement has become a core competitive factor in soft drinks

Sustainability is a core business strategy

COMPETITIVE LANDSCAPE

Coca-Cola's maintains its lead with a combination of brand strength, marketing scale and distribution reach

Atlantic delivers strong innovation, category diversification, and brand momentum

CHANNELS

Convenience retailers serve as a key channel for quick refreshment purchases

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[Concentrates in Croatia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Technological innovation, playful design, and digital marketing are reshaping the concentrates market

INDUSTRY PERFORMANCE

Modest growth supported by innovation, affordability, and renewed engagement

Innovation brings new energy to powdered concentrates

WHAT'S NEXT?

Innovation and value positioning will continue to attract a broad consumer base

Technological updates have modernised concentrates and made them relevant for younger, more digitally connected consumers

COMPETITIVE LANDSCAPE

Atlantic Grupa's lead supported by the continued success of its flagship Cedevita brand

Jamnica's new Toco Loco brand quickly establishes itself as a standout new entrant

CHANNELS

Consumers value supermarkets' wide assortments and frequent promotions

Horeca upswing as concentrates find new uses in cafés, restaurants, and hotels

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[Juice in Croatia](#)

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2025 DEVELOPMENTS

Improved affordability and effective promotions support growth

INDUSTRY PERFORMANCE

Government and manufacturers help maintain demand in 2025

Nectars benefit from their mid-priced positioning

WHAT'S NEXT?

Moderate growth underpinned by the resilience of nectars and juice drinks

Digital and technological advancements play a defining role

Sustainability: a central focus for both companies and consumers

COMPETITIVE LANDSCAPE

Stanic strengthens its lead in juice in 2025

Maraska benefits from a revitalised product portfolio and stronger focus on traditional Croatian flavours

CHANNELS

Supermarkets' lead supported by their extensive product ranges and competitive pricing

Direct selling dynamism as consumers show growing interest in locally produced and more natural juices

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RTD Coffee in Croatia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising seasonal demand and innovation drive growth

INDUSTRY PERFORMANCE

RTD coffee is still in its early adoption phase

WHAT'S NEXT?

Rosy outlook over the forecast period

Advancements in production, distribution, and digital engagement position RTD coffee as a modern, lifestyle-driven category

COMPETITIVE LANDSCAPE

Ennstal Milch leads, providing a reliable, high-quality, and indulgent product

Franck is the most dynamic player, bridging its heritage with modern trends

CHANNELS

Combined dominance of small local grocers and forecourt retailers as the market is heavily driven by on-the-go consumption

Vending benefits from consumers increasingly seeking convenient, on-the-go coffee

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RTD Tea in Croatia

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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

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Energy Drinks in Croatia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Volume growth driven by diversified consumption occasions, innovation, and strong category visibility

INDUSTRY PERFORMANCE

Continued strong consumer demand for functional and stimulating beverages

WHAT'S NEXT?

Demand to remain buoyant as energy drinks expand beyond their core base

Growing cross-category convergence between energy, wellness, medication and functional performance beverages

COMPETITIVE LANDSCAPE

Red Bull and Hell Energy account for the majority of sales

Vindija's Uragan demonstrates that local producers can successfully challenge established global players

CHANNELS

Leading supermarkets valued for their broad assortments, frequent promotions, and widespread coverage
Online grocery platforms and delivery apps make energy drinks more accessible

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[Sports Drinks in Croatia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sports drinks have broadened their appeal well beyond professional athletes and fitness enthusiasts

INDUSTRY PERFORMANCE

Sports drinks gain traction both as performance and everyday refreshment beverages

WHAT'S NEXT?

Dynamic growth supported by sustained interest in active lifestyles, functional hydration, and health-oriented consumption
Technological versatility and cross-category innovation enables breweries to reshape the sports drinks landscape
Shift toward low-calorie, natural, and fortified options

COMPETITIVE LANDSCAPE

Exceptional success of Hydra Iso ensures top spot for Zagrebacka Pivovara

Oshee Isotonic Drink resonates with consumers seeking affordable performance beverages with a health-oriented image

CHANNELS

Fitness centres and specialised sports retailers benefit from offering immediate accessibility
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