



**Euromonitor  
International**

# Soft Drinks in Croatia

December 2025

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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

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

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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 it lead with a combination of brand strength, marketing scale and distribution reach  
Atlantic delivers strong innovation, category diversification, and brand momentum

## CHANNELS

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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  
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[Juice in Croatia](#)

## KEY DATA FINDINGS

### 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

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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

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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  
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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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