



Concentrates in Croatia

December 2025

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Concentrates in Croatia - Category analysis

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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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Soft Drinks in Croatia - Industry Overview

EXECUTIVE SUMMARY

Steady expansion, with rising demand in several key categories

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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

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