



# Bottled Water in Croatia

December 2025

Table of Contents

## Bottled Water in Croatia - Category analysis

### 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

#### CATEGORY DATA

Table 1 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 2 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 3 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

Table 4 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 6 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 7 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 8 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 9 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 10 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 11 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 12 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

#### COUNTRY REPORTS DISCLAIMER

## Soft Drinks in Croatia - Industry Overview

### 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

## MARKET DATA

Table 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 27 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 28 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 29 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 30 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 31 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 32 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 33 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 34 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 35 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 36 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 37 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 38 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 39 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 40 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 41 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 42 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 43 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 44 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## 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/bottled-water-in-croatia/report](http://www.euromonitor.com/bottled-water-in-croatia/report).