



Euromonitor
International

Energy Drinks in Croatia

December 2025

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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 Urgan 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

CATEGORY DATA

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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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