



**Euromonitor
International**

Soft Drinks in Croatia

December 2025

Table of Contents

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

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[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

CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025
Table 34 - Off-trade Sales of Bottled Water by Category: Value 2020-2025
Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025
Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025
Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025
Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025
Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025
Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025
Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030
Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030
Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030
Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[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

Convenience retailers serve as a key channel for quick refreshment purchases
Ongoing shift toward digital purchasing and home delivery

CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025
Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025
Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025
Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025
Table 49 - Off-trade Sales of Carbonates by Category: Volume 2020-2025
Table 50 - Off-trade Sales of Carbonates by Category: Value 2020-2025
Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025
Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025
Table 53 - Sales of Carbonates by Total Fountain On-trade: Volume 2020-2025
Table 54 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2020-2025
Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025
Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025
Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025
Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025
Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030
Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030
Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030
Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030
Table 63 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2025-2030
Table 64 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[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
Concentrates Conversions
Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 65 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025
Table 66 - Off-trade Sales of Concentrates by Category: Value 2020-2025
Table 67 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025
Table 68 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025
Table 69 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2021-2025
Table 70 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025
Table 71 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025
Table 72 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025
Table 73 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025
Table 74 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025
Table 75 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025
Table 76 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025
Table 77 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030
Table 78 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030
Table 79 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030
Table 80 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[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

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

CATEGORY DATA

Table 81 - Off-trade Sales of Juice by Category: Volume 2020-2025

Table 82 - Off-trade Sales of Juice by Category: Value 2020-2025

Table 83 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025

Table 84 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025

Table 85 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025

Table 86 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025

Table 87 - NBO Company Shares of Off-trade Juice: % Value 2021-2025

Table 88 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025

Table 89 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030

Table 90 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030

Table 91 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030

Table 92 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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

CATEGORY DATA

Table 93 - Off-trade Sales of RTD Coffee: Volume 2020-2025

Table 94 - Off-trade Sales of RTD Coffee: Value 2020-2025

Table 95 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

Table 96 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 97 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 98 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 99 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 100 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 101 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 102 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 103 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 104 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Tea in Croatia

KEY DATA FINDINGS

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

Supermarkets' lead supported by broad refrigerated display space
Convenience of e-commerce increasingly important for the modern consumer

CATEGORY DATA

- Table 105 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025
- Table 106 - Off-trade Sales of RTD Tea by Category: Value 2020-2025
- Table 107 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025
- Table 108 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025
- Table 109 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025
- Table 110 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025
- Table 111 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025
- Table 112 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025
- Table 113 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030
- Table 114 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030
- Table 115 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030
- Table 116 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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

CATEGORY DATA

Table 117 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 118 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 119 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 120 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 121 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 122 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 123 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 124 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 125 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 126 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 127 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 128 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[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

Consumers increasingly purchase sports drinks immediately before or after workouts

CATEGORY DATA

Table 129 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 130 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 131 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 132 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 133 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 134 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 135 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 136 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 137 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 138 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 139 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 140 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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/soft-drinks-in-croatia/report.