



Bottled Water in Croatia

December 2025

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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

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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

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