

Carbonates in Croatia

December 2025

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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

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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

MARKET DATA

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