



Soft Drinks in Bosnia and Herzegovina

December 2025

[Table of Contents](#)

EXECUTIVE SUMMARY

Growth despite lingering inflation and price increases

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Consumers continue to trade down in 2025

Rising demand for healthier drinks amongst health-conscious consumers

Manufacturers tailor their distribution, pricing, and packaging strategies to each retail channel

WHAT'S NEXT?

New product development to drive premiumisation and help mitigate the impact of a declining population

New players expected to enter the market

Retail e-commerce to remain the fastest growing distribution channel

COMPETITIVE LANDSCAPE

Leading Sarajevski Kiseljak enjoys strong recognition and loyalty among local consumers

Planinka's Prolom bottled water is widely known for its purported healing properties

CHANNELS

Supermarkets strengthen their leadership

Retail e-commerce sees dynamic growth

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 Bosnia and Herzegovina](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Consumers shift toward better-for-you soft drinks

INDUSTRY PERFORMANCE

Quality tap water limits more robust expansion

Sparkling flavoured water leads growth

WHAT'S NEXT?

Growth supported by improving quality of life and the entrance of new brands

Shift toward better-for-you soft drinks

Rising importance of sustainability and environmental initiatives

COMPETITIVE LANDSCAPE

Sarajevski Kiseljak enjoys strong recognition and loyalty among local consumers

Planinka's Prolom brand is widely known for its purported healing properties

CHANNELS

Expanding product range and proximity ensure food/drink/tobacco specialists lead

Vending sees dynamic growth, albeit from a very low base

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 Bosnia and Herzegovina](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health and wellness trend continues to impact demand

INDUSTRY PERFORMANCE

Ongoing shift from regular carbonates toward reduced sugar variants

Cocktail culture benefits tonic water/mixers/other bitters

WHAT'S NEXT?

Stagnation due to rising health concerns

Novel flavours and branding initiatives

Packaging, waste management, and recycling initiatives shape the market

COMPETITIVE LANDSCAPE

Coca-Cola leads with its renowned portfolio

Sarajevski Kiseljak's brands enjoy a high level of trust

CHANNELS

Consumers value the convenience of small local grocers

Robust growth of convenient e-commerce

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 Bosnia and Herzegovina](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Shifting consumer preferences

INDUSTRY PERFORMANCE

Waning demand for liquid concentrates amid health-conscious shifts

Powder concentrates sustain popularity with health-associated appeal

WHAT'S NEXT?

Further decline as liquid concentrates lose their appeal
Improving supply chain traceability increasingly important
Rising consumer demand for cleaner, more natural products

COMPETITIVE LANDSCAPE

Fructal maintains strong consumer loyalty
Frupi's broad selection drives growth of Biolife in 2025

CHANNELS

Small local grocers lead with their dense network of conveniently located outlets
Convenient e-commerce records the strongest growth
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 Bosnia and Herzegovina](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Ongoing shift from carbonates to juice

INDUSTRY PERFORMANCE

Health and wellness trend supports moderate growth in 2025
Nectars benefit from their affordability

WHAT'S NEXT?

Reconstituted 100% juice projected to gain traction
Impact of digital agriculture and smart farming tools
Significant regulatory shifts

COMPETITIVE LANDSCAPE

Fructal brand benefits from significant scale and distribution capabilities

CHANNELS

Modern grocery retailers strengthen their position

Increasing consumer confidence in online shopping drives strong e-commerce growth

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 Bosnia and Herzegovina](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth driven by the growing importance of convenience and on-the-go consumption

INDUSTRY PERFORMANCE

Product innovation helps to sustain consumer interest

WHAT'S NEXT?

Further expansion supported by rising demand for convenient, ready-to-drink options

Innovation to focus on more diverse, premium, and convenience-focused offerings

Influence of the health and wellness trend

COMPETITIVE LANDSCAPE

Nestlé leads with its long-established and highly trusted Nescafé brand

New brands accelerate diversification within the category

CHANNELS

Supermarkets lead, offering the broadest product selection

E-commerce has made RTD coffee more accessible to a broader consumer base

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 Bosnia and Herzegovina

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD tea benefits from its perception as a healthier and more versatile option

INDUSTRY PERFORMANCE

Rising demand for convenience and on-the-go consumption

Health and wellness trends boosts reduced sugar options

WHAT'S NEXT?

Shift to healthier beverages benefits RTD tea

Production and packaging developments

RTD tea reshaped by innovations across processing, functionality, supply chain, and consumption experience

COMPETITIVE LANDSCAPE

Leading Fortenova Grupa's Jana brand enjoys a strong reputation in the region

Launch of new brands supports expansion of "others"

CHANNELS

Small local grocers lead, offering convenience and easy access for everyday purchases

Consumers value the ease and convenience of e-commerce and home delivery

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 Bosnia and Herzegovina

KEY DATA FINDINGS

2025 DEVELOPMENTS

Energy drinks: the preferred beverages of younger generations

INDUSTRY PERFORMANCE

Strong marketing and broad availability fuel solid growth

Healthy lifestyle choices drive demand for reduced sugar energy drinks

WHAT'S NEXT?

Sustained interest in energy drinks

Growing emphasis on flavour differentiation and functional claims

Potential ban on the sale of energy drinks

COMPETITIVE LANDSCAPE

Red Bull's ubiquitous market presence ensures its lead

Dynamic "others" as new brands continue to enter the market

CHANNELS

Food/drink/tobacco specialists offer a broad product range and convenience

Increasing consumer confidence in online shopping boosts growth of e-commerce

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 Bosnia and Herzegovina](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sport drinks: a staple among health-conscious and physically active demographics

INDUSTRY PERFORMANCE

Fitness and youth engagement fuel further growth in 2025

Social media and fitness trends expand consumer base

WHAT'S NEXT?

Premiumisation will help to partially offset the impact of a shrinking consumer base

Functional innovation trend

Shift toward more holistic health benefits

COMPETITIVE LANDSCAPE

Jamnica plus has a strong reputation for high-quality products

Increasing fragmentation with the arrival of new brands

CHANNELS

Supermarkets offer a consistent supply of brands

Dynamic e-commerce offers the widest range of international sports drinks brands

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-bosnia-and-herzegovina/report.