



Tea in Bosnia and Herzegovina

December 2025

Table of Contents

Tea in Bosnia and Herzegovina - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Stable demand

INDUSTRY PERFORMANCE

Tea's steady presence in a coffee-dominated culture

Black tea remains the cornerstone of local tea culture

WHAT'S NEXT?

Demographic challenge remains an obstacle

Cajana Tea Lab: a new concept

EU support to ensure quality and hygiene standards are met

COMPETITIVE LANDSCAPE

Plantago's natural teas are highly regarded

Jan Spider's dynamic growth driven by the strong performance of Naturavita

CHANNELS

Convenient small local grocers lead tea sales

Dynamic vending, albeit from a very low base

CATEGORY DATA

Table 1 - Retail Sales of Tea by Category: Volume 2020-2025

Table 2 - Retail Sales of Tea by Category: Value 2020-2025

Table 3 - Retail Sales of Tea by Category: % Volume Growth 2020-2025

Table 4 - Retail Sales of Tea by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Tea: % Retail Value 2021-2025

Table 6 - LBN Brand Shares of Tea: % Retail Value 2022-2025

Table 7 - Forecast Retail Sales of Tea by Category: Volume 2025-2030

Table 8 - Forecast Retail Sales of Tea by Category: Value 2025-2030

Table 9 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030

Table 10 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Hot Drinks in Bosnia and Herzegovina - Industry Overview

EXECUTIVE SUMMARY

Demographic trends continue to constrain growth potential

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Rising prices force consumers to trade down

Health and wellness and convenience trends influence purchasing decisions

Foodservice for drinks that cannot be easily prepared at home

WHAT'S NEXT?

Impact of maturity and declining population

Competitive landscape to remain stable, with niche categories attracting new entrants

Retail e-commerce to remain the fastest growing distribution channel

COMPETITIVE LANDSCAPE

Atlantic Grand leads with a strong brand portfolio

Mondelez International benefits from the strong performance of Milka Choco Drink

CHANNELS

Supermarkets strengthen their leadership in hot drinks distribution

Retail e-commerce sees dynamic growth, while vending remains limited

Foodservice vs retail split

MARKET DATA

Table 11 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 12 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 13 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 14 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 15 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 16 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 17 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 18 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 19 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 20 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 21 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 22 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 23 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 24 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 25 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 26 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 28 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 29 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 30 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 32 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 34 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 35 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

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/tea-in-bosnia-and-herzegovina/report.