



Euromonitor
International

Consumer Health in Bosnia and Herzegovina

September 2025

Table of Contents

Consumer Health in Bosnia and Herzegovina

EXECUTIVE SUMMARY

Consumer Health in 2025: The big picture

Key trends in 2025

Competitive landscape

Channel developments

What next for consumer health?

MARKET INDICATORS

Table 1 - Consumer Expenditure on Health Goods and Medical Services: Value 2020-2025

Table 2 - Life Expectancy at Birth 2020-2025

MARKET DATA

Table 3 - Sales of Consumer Health by Category: Value 2020-2025

Table 4 - Sales of Consumer Health by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Consumer Health: % Value 2021-2025

Table 6 - LBN Brand Shares of Consumer Health: % Value 2022-2025

Table 7 - Penetration of Private Label by Category: % Value 2020-2025

Table 8 - Distribution of Consumer Health by Format: % Value 2020-2025

Table 9 - Distribution of Consumer Health by Format and Category: % Value 2025

Table 10 - Forecast Sales of Consumer Health by Category: Value 2025-2030

Table 11 - Forecast Sales of Consumer Health by Category: % Value Growth 2025-2030

APPENDIX

OTC registration and classification

Vitamins and dietary supplements registration and classification

Self-medication/self-care and preventive medicine

Switches

DISCLAIMER

DEFINITIONS

SOURCES

Summary 1 - Research Sources

Analgesics in Bosnia and Herzegovina

KEY DATA FINDINGS

2025 DEVELOPMENTS

Profit margins still tight

Bayer holds on to tight lead

Pharmacies only permitted distribution channel for analgesics

PROSPECTS AND OPPORTUNITIES

Muted constant value growth in what is a mature product area

Combination analgesics perform strongly, while there is rising concern about opioid analgesics such as codeine

Analgesics increasingly added as functional benefit in wellness products

CATEGORY DATA

Table 12 - Sales of Analgesics by Category: Value 2020-2025

Table 13 - Sales of Analgesics by Category: % Value Growth 2020-2025

Table 14 - NBO Company Shares of Analgesics: % Value 2021-2025

Table 15 - LBN Brand Shares of Analgesics: % Value 2022-2025

Table 16 - Forecast Sales of Analgesics by Category: Value 2025-2030

Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2025-2030

Cough, Cold and Allergy (Hay Fever) Remedies in Bosnia and Herzegovina

KEY DATA FINDINGS

2025 DEVELOPMENTS

Long winter and increasing allergies support value sales

Bronchostop syrup registers highest value growth

Pharmacies main distribution channel

PROSPECTS AND OPPORTUNITIES

Stable growth over forecast period

Continuing innovation keeps consumers engaged

Technology plans an increasing role

CATEGORY DATA

Table 18 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2020-2025

Table 19 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2020-2025

Table 20 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2025

Table 21 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2022-2025

Table 22 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2025-2030

Table 23 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2025-2030

Dermatologicals in Bosnia and Herzegovina

KEY DATA FINDINGS

2025 DEVELOPMENTS

Modest value growth in 2025

Bayer continues to account for significant value share

Health and personal care stores gain most value share

PROSPECTS AND OPPORTUNITIES

Muted constant value growth over forecast period

Technology drives innovation over forecast period

Ageing population and climate change support growth

CATEGORY DATA

Table 24 - Sales of Dermatologicals by Category: Value 2020-2025

Table 25 - Sales of Dermatologicals by Category: % Value Growth 2020-2025

Table 26 - NBO Company Shares of Dermatologicals: % Value 2021-2025

Table 27 - LBN Brand Shares of Dermatologicals: % Value 2022-2025

Table 28 - Forecast Sales of Dermatologicals by Category: Value 2025-2030

Table 29 - Forecast Sales of Dermatologicals by Category: % Value Growth 2025-2030

Digestive Remedies in Bosnia and Herzegovina

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growing focus on gut health

Slovenian company Lex maintains top position

Pharmacies main distribution channel

PROSPECTS AND OPPORTUNITIES

Muted growth over forecast period

Innovation key to driving growth

Increasing focus on mind-gut remedies

CATEGORY DATA

Table 30 - Sales of Digestive Remedies by Category: Value 2020-2025

Table 31 - Sales of Digestive Remedies by Category: % Value Growth 2020-2025

Table 32 - NBO Company Shares of Digestive Remedies: % Value 2021-2025

Table 33 - LBN Brand Shares of Digestive Remedies: % Value 2022-2025

Table 34 - Forecast Sales of Digestive Remedies by Category: Value 2025-2030

Table 35 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2025-2030

Wound Care in Bosnia and Herzegovina

KEY DATA FINDINGS

2025 DEVELOPMENTS

Moderate value and volume growth in 2025

Local company Saniteks continues to have commanding lead

Hypermarkets gain most value share

PROSPECTS AND OPPORTUNITIES

Continuing premiumisation maintains sales

Future of wound care see offerings also functions as healing devices

Focus on hydrogels

CATEGORY DATA

Table 36 - Sales of Wound Care by Category: Value 2020-2025

Table 37 - Sales of Wound Care by Category: % Value Growth 2020-2025

Table 38 - NBO Company Shares of Wound Care: % Value 2021-2025

Table 39 - LBN Brand Shares of Wound Care: % Value 2022-2025

Table 40 - Forecast Sales of Wound Care by Category: Value 2025-2030

Table 41 - Forecast Sales of Wound Care by Category: % Value Growth 2025-2030

Sports Nutrition in Bosnia and Herzegovina

KEY DATA FINDINGS

2025 DEVELOPMENTS

Healthy value growth in 2025

Landscape becomes increasingly competitive

Health and personal care stores lead distribution

PROSPECTS AND OPPORTUNITIES

Continuing population decline dampens value sales

Sports nutrition increasingly personalised

Sports nutrition moves beyond muscle growth

CATEGORY DATA

Table 42 - Sales of Sports Nutrition by Category: Value 2020-2025

Table 43 - Sales of Sports Nutrition by Category: % Value Growth 2020-2025

Table 44 - NBO Company Shares of Sports Nutrition: % Value 2021-2025

Table 45 - LBN Brand Shares of Sports Nutrition: % Value 2022-2025

Table 46 - Forecast Sales of Sports Nutrition by Category: Value 2025-2030

Table 47 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2025-2030

Dietary Supplements in Bosnia and Herzegovina

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Strong performance in 2025
- The Bountiful Co holds on to tight lead
- E-commerce gains most value share

PROSPECTS AND OPPORTUNITIES

- Continuing growth over forecast period
- Increasing personalisation of dietary supplements
- Herbal dietary supplements register strong value growth

CATEGORY DATA

Table 48 - Sales of Dietary Supplements by Category: Value 2020-2025

Table 49 - Sales of Dietary Supplements by Category: % Value Growth 2020-2025

Table 50 - Sales of Dietary Supplements by Positioning: % Value 2020-2025

Table 51 - NBO Company Shares of Dietary Supplements: % Value 2021-2025

Table 52 - LBN Brand Shares of Dietary Supplements: % Value 2022-2025

Table 53 - Forecast Sales of Dietary Supplements by Category: Value 2025-2030

Table 54 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2025-2030

Vitamins in Bosnia and Herzegovina

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Healthy value and volume growth in 2025
- Krka holds on to strong lead
- E-commerce gains most value share

PROSPECTS AND OPPORTUNITIES

- Postive outlook over forecast period
- Significant innovation over forecast period
- Increasing personalisation, as well as more focus on clean and natural offerings

CATEGORY DATA

Table 55 - Sales of Vitamins by Category: Value 2020-2025

Table 56 - Sales of Vitamins by Category: % Value Growth 2020-2025

Table 57 - Sales of Multivitamins by Positioning: % Value 2020-2025

Table 58 - NBO Company Shares of Vitamins: % Value 2021-2025

Table 59 - LBN Brand Shares of Vitamins: % Value 2022-2025

Table 60 - Forecast Sales of Vitamins by Category: Value 2025-2030

Table 61 - Forecast Sales of Vitamins by Category: % Value Growth 2025-2030

Weight Management and Wellbeing in Bosnia and Herzegovina

KEY DATA FINDINGS

2025 DEVELOPMENTS

Strong performance in 2025

Abela Pharm further cements its leadership

E-commerce makes significant gains

PROSPECTS AND OPPORTUNITIES

Further healthy growth

Technology increasingly used to support weight management and wellbeing

Continuing innovation over forecast period

CATEGORY DATA

Table 62 - Sales of Weight Management and Wellbeing by Category: Value 2020-2025

Table 63 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2020-2025

Table 64 - NBO Company Shares of Weight Management and Wellbeing: % Value 2021-2025

Table 65 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2022-2025

Table 66 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2025-2030

Table 67 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2025-2030

Herbal/Traditional Products in Bosnia and Herzegovina

KEY DATA FINDINGS

2025 DEVELOPMENTS

Herbal/traditional products continues to be a sizeable consumer health product

Krka continues to have sizeable lead

E-commerce makes significant gains

PROSPECTS AND OPPORTUNITIES

Continuing demand over forecast period

Herbal/traditional products are increasingly backed by science and also more customised

Herbal/traditional products move into the mainstream

CATEGORY DATA

Table 68 - Sales of Herbal/Traditional Products: Value 2020-2025

Table 69 - Sales of Herbal/Traditional Products: % Value Growth 2020-2025

Table 70 - NBO Company Shares of Herbal/Traditional Products: % Value 2021-2025

Table 71 - LBN Brand Shares of Herbal/Traditional Products: % Value 2022-2025

Table 72 - Forecast Sales of Herbal/Traditional Products: Value 2025-2030

Table 73 - Forecast Sales of Herbal/Traditional Products: % Value Growth 2025-2030

Paediatric Consumer Health in Bosnia and Herzegovina

KEY DATA FINDINGS

2025 DEVELOPMENTS

Paediatric vitamins and dietary supplements gain the most value share

Slovenian company Krka leads

Digital native parents drive growth in e-commerce

PROSPECTS AND OPPORTUNITIES

Falling birth rate dampens growth

Players focus on increasing palatability

Paediatric consumer health becomes more customised

CATEGORY DATA

Table 74 - Sales of Paediatric Consumer Health by Category: Value 2020-2025

Table 75 - Sales of Paediatric Consumer Health by Category: % Value Growth 2020-2025

Table 76 - Forecast Sales of Paediatric Consumer Health by Category: Value 2025-2030

Table 77 - Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2025-2030

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/consumer-health-in-bosnia-and-herzegovina/report.