



Processed Fruit and Vegetables in Bosnia and Herzegovina

December 2025

Processed Fruit and Vegetables in Bosnia and Herzegovina - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Baseline demand maintains low volume growth, while high prices support value growth

INDUSTRY PERFORMANCE

Processed options benefit from being more affordable than fresh alternatives

Frozen processed fruit and vegetables align with healthy eating trends

WHAT'S NEXT?

Ongoing positive sales supported by baseline demand and high prices

Health and wellness trends will support sales and inspire new product innovations

Online expansion and sustainable packaging initiatives are supporting developments in processed fruit and vegetables

COMPETITIVE LANDSCAPE

Ledo maintains lead thanks to strong positioning in frozen fruit

McCain Foods benefits from its strength in frozen processed potatoes

CHANNELS

Small local grocers remains the leading channel, with supermarkets a close second

Retail e-commerce continues overall growth trend from a low base

CATEGORY DATA

Table 1 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025

Table 2 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025

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Staple Foods in Bosnia and Herzegovina - Industry Overview

EXECUTIVE SUMMARY

Positive sales continue, with value supported by high prices and volume meeting baseline demand

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Essential nature of products in staple foods supports ongoing demand

Health and wellness trends continue to influence product innovations and purchasing behaviours

Various sustainability trends noted in staple foods

WHAT'S NEXT?

Ongoing positive sales supported by baseline demand and elevated prices

A dual focus on health and wellness and cost efficiency expected

Costs remain under pressure and government price controls remain

COMPETITIVE LANDSCAPE

Artisanal producers lead staple foods, thanks to cultural relevance of fresh bread and pastries

Zlatiborac shows strongest growth thanks to premium processed meat and innovative packaging solutions

CHANNELS

Small local grocers remains the leading channel, albeit with supermarkets in hot pursuit

Retail e-commerce sees strong growth from a low base

MARKET DATA

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Table 24 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

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