



Euromonitor
International

Bottled Water in Bosnia and Herzegovina

December 2025

Table of Contents

Bottled Water in Bosnia and Herzegovina - Category analysis

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 1 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 2 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 3 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

Table 4 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 6 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 7 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 8 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 9 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 10 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 11 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 12 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Soft Drinks in Bosnia and Herzegovina - Industry Overview

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 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 27 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 28 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 29 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 30 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 31 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 32 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 33 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 34 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 35 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 36 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 37 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 38 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 39 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 40 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 41 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 42 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 43 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 44 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

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/bottled-water-in-bosnia-and-herzegovina/report.