



# Juice in Bosnia and Herzegovina

December 2025

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## 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

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Modern grocery retailers strengthen their position

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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

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Supermarkets strengthen their leadership  
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