



Soft Drinks in Bosnia and Herzegovina

December 2025

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Soft Drinks in Bosnia and Herzegovina

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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[Bottled Water in Bosnia and Herzegovina](#)

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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

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[Carbonates in Bosnia and Herzegovina](#)

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INDUSTRY PERFORMANCE

Ongoing shift from regular carbonates toward reduced sugar variants

Cocktail culture benefits tonic water/mixers/other bitters

WHAT'S NEXT?

Stagnation due to rising health concerns

Novel flavours and branding initiatives

Packaging, waste management, and recycling initiatives shape the market

COMPETITIVE LANDSCAPE

Coca-Cola leads with its renowned portfolio

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[Concentrates in Bosnia and Herzegovina](#)

KEY DATA FINDINGS

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INDUSTRY PERFORMANCE

Waning demand for liquid concentrates amid health-conscious shifts

Powder concentrates sustain popularity with health-associated appeal

WHAT'S NEXT?

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Improving supply chain traceability increasingly important
Rising consumer demand for cleaner, more natural products

COMPETITIVE LANDSCAPE

Fructal maintains strong consumer loyalty
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Juice in Bosnia and Herzegovina

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2025 DEVELOPMENTS

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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
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COMPETITIVE LANDSCAPE

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RTD Coffee in Bosnia and Herzegovina

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Growth driven by the growing importance of convenience and on-the-go consumption

INDUSTRY PERFORMANCE

Product innovation helps to sustain consumer interest

WHAT'S NEXT?

Further expansion supported by rising demand for convenient, ready-to-drink options

Innovation to focus on more diverse, premium, and convenience-focused offerings

Influence of the health and wellness trend

COMPETITIVE LANDSCAPE

Nestlé leads with its long-established and highly trusted Nescafé brand

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RTD Tea in Bosnia and Herzegovina

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INDUSTRY PERFORMANCE

Rising demand for convenience and on-the-go consumption

Health and wellness trends boosts reduced sugar options

WHAT'S NEXT?

Shift to healthier beverages benefits RTD tea

Production and packaging developments

RTD tea reshaped by innovations across processing, functionality, supply chain, and consumption experience

COMPETITIVE LANDSCAPE

Leading Fortenova Grupa's Jana brand enjoys a strong reputation in the region

Launch of new brands supports expansion of "others"

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Energy Drinks in Bosnia and Herzegovina

KEY DATA FINDINGS

2025 DEVELOPMENTS

Energy drinks: the preferred beverages of younger generations

INDUSTRY PERFORMANCE

Strong marketing and broad availability fuel solid growth

Healthy lifestyle choices drive demand for reduced sugar energy drinks

WHAT'S NEXT?

Sustained interest in energy drinks

Growing emphasis on flavour differentiation and functional claims

Potential ban on the sale of energy drinks

COMPETITIVE LANDSCAPE

Red Bull's ubiquitous market presence ensures its lead

Dynamic "others" as new brands continue to enter the market

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[Sports Drinks in Bosnia and Herzegovina](#)

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INDUSTRY PERFORMANCE

Fitness and youth engagement fuel further growth in 2025

Social media and fitness trends expand consumer base

WHAT'S NEXT?

Premiumisation will help to partially offset the impact of a shrinking consumer base

Functional innovation trend

Shift toward more holistic health benefits

COMPETITIVE LANDSCAPE

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