



Processed Meat, Seafood and Alternatives To Meat in Bosnia and Herzegovina

December 2025

KEY DATA FINDINGS

2025 DEVELOPMENTS

A fairly stable performance with baseline demand supporting low volume and high prices supporting stronger value growth

INDUSTRY PERFORMANCE

Value growth supported by inflation pushing up the price of meat

Frozen processed seafood benefits from affordability and convenience

WHAT'S NEXT?

Positive sales will continue, with convenience expected to remain a key sales driver

Health and wellness trends inspire high-protein options

Potential for prices to stabilise over the forecast period

COMPETITIVE LANDSCAPE

Akova Group maintains lead thanks to wide portfolio and strong distribution

Zlatiborac benefits from an expanded presence, strong innovation, and a focus on sustainability

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 Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat 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 16 - Sales of Staple Foods by Category: Value 2020-2025

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Table 25 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

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