



# Alcoholic Drinks in Bosnia and Herzegovina

June 2025

Table of Contents

## EXECUTIVE SUMMARY

Alcoholic drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retail developments

On-trade vs off-trade split

What next for alcoholic drinks?

## MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

## TAXATION AND DUTY LEVIES

## OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

## KEY NEW PRODUCT LAUNCHES

Outlook

## MARKET INDICATORS

Table 1 - Retail Consumer Expenditure on Alcoholic Drinks 2019-2024

## MARKET DATA

Table 2 - Sales of Alcoholic Drinks by Category: Total Volume 2019-2024

Table 3 - Sales of Alcoholic Drinks by Category: Total Value 2019-2024

Table 4 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2019-2024

Table 5 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2019-2024

Table 6 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2024

Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2024

Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2024

Table 9 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2024

Table 10 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2020-2024

Table 11 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2019-2024

Table 12 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2024

Table 13 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2024-2029

Table 14 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2024-2029

Table 15 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2024-2029

Table 16 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2024-2029

## DISCLAIMER

## SOURCES

Summary 1 - Research Sources

Beer in Bosnia and Herzegovina

KEY DATA FINDINGS

2024 DEVELOPMENTS

High level of saturation limits overall growth but potential remains in niche segments  
Starbev Sarl retains its leading position, driven by broad and popular brand portfolio  
Food/drink/tobacco specialists lead off-trade beer sales while e-commerce is key driver of growth

PROSPECTS AND OPPORTUNITIES

Modest growth expected in mature market, although niche and alternative offerings will gain momentum  
Craft beer will see growing presence  
Non-alcoholic and low-alcohol beers will see inclusion functional ingredients to meet demands of health-conscious

CATEGORY BACKGROUND

Lager price band methodology  
Summary 2 - Lager by Price Band 2024

CATEGORY DATA

- Table 17 - Sales of Beer by Category: Total Volume 2019-2024
- Table 18 - Sales of Beer by Category: Total Value 2019-2024
- Table 19 - Sales of Beer by Category: % Total Volume Growth 2019-2024
- Table 20 - Sales of Beer by Category: % Total Value Growth 2019-2024
- Table 21 - Sales of Beer by Off-trade vs On-trade: Volume 2019-2024
- Table 22 - Sales of Beer by Off-trade vs On-trade: Value 2019-2024
- Table 23 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 24 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 25 - Sales of Beer by Craft vs Standard 2019-2024
- Table 26 - GBO Company Shares of Beer: % Total Volume 2020-2024
- Table 27 - NBO Company Shares of Beer: % Total Volume 2020-2024
- Table 28 - LBN Brand Shares of Beer: % Total Volume 2021-2024
- Table 29 - Forecast Sales of Beer by Category: Total Volume 2024-2029
- Table 30 - Forecast Sales of Beer by Category: Total Value 2024-2029
- Table 31 - Forecast Sales of Beer by Category: % Total Volume Growth 2024-2029
- Table 32 - Forecast Sales of Beer by Category: % Total Value Growth 2024-2029

Cider/Perry in Bosnia and Herzegovina

KEY DATA FINDINGS

2024 DEVELOPMENTS

Somersby fuels strong growth in cider/perry amid limited competition  
Carlsberg leads cider/perry, while Strongbow drives Heineken's momentum  
Supermarkets and e-commerce make further gains

PROSPECTS AND OPPORTUNITIES

Demographic challenges will impact the market  
Artisanal innovation and e-commerce set to drive premiumisation  
Wine-inspired cider and perry to emerge as viable alternatives

CATEGORY DATA

- Table 33 - Sales of Cider/Perry: Total Volume 2019-2024
- Table 34 - Sales of Cider/Perry: Total Value 2019-2024
- Table 35 - Sales of Cider/Perry: % Total Volume Growth 2019-2024

Table 36 - Sales of Cider/Perry: % Total Value Growth 2019-2024  
Table 37 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2019-2024  
Table 38 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2019-2024  
Table 39 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2019-2024  
Table 40 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2019-2024  
Table 41 - GBO Company Shares of Cider/Perry: % Total Volume 2020-2024  
Table 42 - NBO Company Shares of Cider/Perry: % Total Volume 2020-2024  
Table 43 - LBN Brand Shares of Cider/Perry: % Total Volume 2021-2024  
Table 44 - Forecast Sales of Cider/Perry: Total Volume 2024-2029  
Table 45 - Forecast Sales of Cider/Perry: Total Value 2024-2029  
Table 46 - Forecast Sales of Cider/Perry: % Total Volume Growth 2024-2029  
Table 47 - Forecast Sales of Cider/Perry: % Total Value Growth 2024-2029

## [Rtds in Bosnia and Herzegovina](#)

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Sales of RTDs surge in 2024, supported by high level of innovation  
Olvi Oyj drives market growth with Le Coq and Johan Freitag  
Modern grocery retailers and e-commerce fuel growth, while on-trade dominates sales

### PROSPECTS AND OPPORTUNITIES

Market faces slowdown amid demographic challenges, but spirit-based RTDs remain growth drivers  
RTD market set for intensified competition amid focus on health  
Innovation in RTDs to focus on new flavours, premium ingredients, and wellness

### CATEGORY DATA

Table 48 - Sales of RTDs by Category: Total Volume 2019-2024  
Table 49 - Sales of RTDs by Category: Total Value 2019-2024  
Table 50 - Sales of RTDs by Category: % Total Volume Growth 2019-2024  
Table 51 - Sales of RTDs by Category: % Total Value Growth 2019-2024  
Table 52 - Sales of RTDs by Off-trade vs On-trade: Volume 2019-2024  
Table 53 - Sales of RTDs by Off-trade vs On-trade: Value 2019-2024  
Table 54 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2019-2024  
Table 55 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2019-2024  
Table 56 - GBO Company Shares of RTDs: % Total Volume 2020-2024  
Table 57 - NBO Company Shares of RTDs: % Total Volume 2020-2024  
Table 58 - LBN Brand Shares of RTDs: % Total Volume 2021-2024  
Table 59 - Forecast Sales of RTDs by Category: Total Volume 2024-2029  
Table 60 - Forecast Sales of RTDs by Category: Total Value 2024-2029  
Table 61 - Forecast Sales of RTDs by Category: % Total Volume Growth 2024-2029  
Table 62 - Forecast Sales of RTDs by Category: % Total Value Growth 2024-2029

## [Spirits in Bosnia and Herzegovina](#)

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Overall growth remains modest but mixology trend drives white rum forward  
Badel 1862 leads the market, driven by strong heritage and continued investment in innovation  
Convenience is key factor shaping choice of retail outlet

### PROSPECTS AND OPPORTUNITIES

Dark rum to lead growth as spirits face slowdown  
E-commerce channel to fuel growth of artisanal offerings  
Innovation in spirits to focus on premiumisation and craftsmanship

#### CATEGORY DATA

Table 63 - Sales of Spirits by Category: Total Volume 2019-2024  
Table 64 - Sales of Spirits by Category: Total Value 2019-2024  
Table 65 - Sales of Spirits by Category: % Total Volume Growth 2019-2024  
Table 66 - Sales of Spirits by Category: % Total Value Growth 2019-2024  
Table 67 - Sales of Spirits by Off-trade vs On-trade: Volume 2019-2024  
Table 68 - Sales of Spirits by Off-trade vs On-trade: Value 2019-2024  
Table 69 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2019-2024  
Table 70 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2019-2024  
Table 71 - Sales of Dark Rum by Price Platform: % Total Volume 2019-2024  
Table 72 - Sales of White Rum by Price Platform: % Total Volume 2019-2024  
Table 73 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2019-2024  
Table 74 - Sales of English Gin by Price Platform: % Total Volume 2019-2024  
Table 75 - Sales of Vodka by Price Platform: % Total Volume 2019-2024  
Table 76 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2019-2024  
Table 77 - GBO Company Shares of Spirits: % Total Volume 2020-2024  
Table 78 - NBO Company Shares of Spirits: % Total Volume 2020-2024  
Table 79 - LBN Brand Shares of Spirits: % Total Volume 2021-2024  
Table 80 - Forecast Sales of Spirits by Category: Total Volume 2024-2029  
Table 81 - Forecast Sales of Spirits by Category: Total Value 2024-2029  
Table 82 - Forecast Sales of Spirits by Category: % Total Volume Growth 2024-2029  
Table 83 - Forecast Sales of Spirits by Category: % Total Value Growth 2024-2029

#### Wine in Bosnia and Herzegovina

#### KEY DATA FINDINGS

##### 2024 DEVELOPMENTS

Wine outpaces beer in terms of growth as premiumisation and on-trade demand drive market expansion  
Innovation accelerates in wine, with premium reds and sparkling varieties leading new launches  
Supermarkets lead wine sales while e-commerce becomes fastest-growing channel

##### PROSPECTS AND OPPORTUNITIES

Growing awareness of health benefits of wine will fuel steady growth, with vermouth set to show particular dynamism  
Still red wine will see strong performance  
Sustainability concerns will shape new packaging formats

#### CATEGORY DATA

Table 84 - Sales of Wine by Category: Total Volume 2019-2024  
Table 85 - Sales of Wine by Category: Total Value 2019-2024  
Table 86 - Sales of Wine by Category: % Total Volume Growth 2019-2024  
Table 87 - Sales of Wine by Category: % Total Value Growth 2019-2024  
Table 88 - Sales of Wine by Off-trade vs On-trade: Volume 2019-2024  
Table 89 - Sales of Wine by Off-trade vs On-trade: Value 2019-2024  
Table 90 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2019-2024  
Table 91 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2019-2024  
Table 92 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2019-2024  
Table 93 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2019-2024  
Table 94 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2019-2024  
Table 95 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2019-2024

Table 96 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024

Table 97 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024

Table 98 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2021-2024

Table 99 - GBO Company Shares of Champagne: % Total Volume 2020-2024

Table 100 - NBO Company Shares of Champagne: % Total Volume 2020-2024

Table 101 - LBN Brand Shares of Champagne: % Total Volume 2021-2024

Table 102 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024

Table 103 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024

Table 104 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2021-2024

Table 105 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024

Table 106 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024

Table 107 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2021-2024

Table 108 - GBO Company Shares of Non-grape Wine: % Total Volume 2020-2024

Table 109 - NBO Company Shares of Non-grape Wine: % Total Volume 2020-2024

Table 110 - LBN Brand Shares of Non-grape Wine: % Total Volume 2021-2024

Table 111 - Forecast Sales of Wine by Category: Total Volume 2024-2029

Table 112 - Forecast Sales of Wine by Category: Total Value 2024-2029

Table 113 - Forecast Sales of Wine by Category: % Total Volume Growth 2024-2029

Table 114 - Forecast Sales of Wine by Category: % Total Value Growth 2024-2029

## About Euromonitor International

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/alcoholic-drinks-in-bosnia-and-herzegovina/report](http://www.euromonitor.com/alcoholic-drinks-in-bosnia-and-herzegovina/report).