



Euromonitor  
International

# Soft Drinks in Bosnia and Herzegovina

December 2024

Table of Contents

EXECUTIVE SUMMARY

- Soft drinks in 2024: The big picture
- 2024 key trends
- Competitive landscape
- Retailing developments
- Foodservice vs retail split
- What next for soft drinks?

MARKET DATA

- Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024
- Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024
- Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024
- Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024
- Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024
- Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024
- Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024
- Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024
- Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024
- Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024
- Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2019-2024
- Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024
- Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024
- Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024
- Table 15 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024
- Table 16 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024
- Table 17 - NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024
- Table 18 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024
- Table 19 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024
- Table 20 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024
- Table 21 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024
- Table 22 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024
- Table 23 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029
- Table 24 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029
- Table 25 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029
- Table 26 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029
- Table 27 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029
- Table 28 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029
- Table 29 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029
- Table 30 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029
- Table 31 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029
- Table 32 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

Steady demand amidst maturity and demographic challenges  
Sparkling flavoured water leads growth in innovation-driven areas  
Product innovation and functional waters drive consumer engagement

PROSPECTS AND OPPORTUNITIES

Stagnation in carbonated water and stability in still water demand  
Flavoured bottled water positioned for continued expansion  
Functionality and new flavours as growth catalysts

CATEGORY DATA

- Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2019-2024
- Table 34 - Off-trade Sales of Bottled Water by Category: Value 2019-2024
- Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2019-2024
- Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2019-2024
- Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2020-2024
- Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2021-2024
- Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024
- Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2021-2024
- Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2024-2029
- Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2024-2029
- Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2024-2029
- Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2024-2029

Carbonates in Bosnia and Herzegovina

KEY DATA FINDINGS

2024 DEVELOPMENTS

Shift from regular to reduced sugar carbonates redefines market dynamics  
Growth in tonic water and orange carbonates driven by mixology trends  
Product innovation in non-cola carbonates support expansion

PROSPECTS AND OPPORTUNITIES

Sustained decline in carbonates amidst health and wellness trends  
Tonic water and mixers set to dominate growth prospects  
Cola carbonates face declining demand but retain relevance

CATEGORY DATA

- Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024
- Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2019-2024
- Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024
- Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024
- Table 49 - Off-trade Sales of Carbonates by Category: Volume 2019-2024
- Table 50 - Off-trade Sales of Carbonates by Category: Value 2019-2024
- Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024
- Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024
- Table 53 - Sales of Carbonates by Total Fountain On-trade: Volume 2019-2024
- Table 54 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2019-2024
- Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024
- Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024
- Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2020-2024
- Table 58 - LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024
- Table 59 - Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029
- Table 60 - Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029

Table 61 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029

Table 62 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029

Table 63 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2024-2029

Table 64 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2024-2029

Concentrates in Bosnia and Herzegovina

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Declining demand for liquid concentrates amid health-conscious shifts
- Powder concentrates sustain popularity with health-associated appeal
- Key product launch targets price-sensitive consumers

PROSPECTS AND OPPORTUNITIES

- Moderate decline expected amid demographic and market challenges
- Shifts in consumer preferences and polarisation
- Neglect by manufacturers limits category innovation

CATEGORY DATA

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 65 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2019-2024

Table 66 - Off-trade Sales of Concentrates by Category: Value 2019-2024

Table 67 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2019-2024

Table 68 - Off-trade Sales of Concentrates by Category: % Value Growth 2019-2024

Table 69 - NBO Company Shares of Off-trade Concentrates (RTD): % Volume 2020-2024

Table 70 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2021-2024

Table 71 - NBO Company Shares of Off-trade Concentrates: % Value 2020-2024

Table 72 - LBN Brand Shares of Off-trade Concentrates: % Value 2021-2024

Table 73 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2024

Table 74 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2024

Table 75 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2024

Table 76 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2024

Table 77 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2024-2029

Table 78 - Forecast Off-trade Sales of Concentrates by Category: Value 2024-2029

Table 79 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2024-2029

Table 80 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2024-2029

Juice in Bosnia and Herzegovina

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Health and wellness trends fuel solid growth in juice category
- Social media amplifies consumer focus on 100% juice categories
- Product innovation and environmental awareness define market dynamics

PROSPECTS AND OPPORTUNITIES

- Mature nectars and juice drinks categories limit growth potential
- Continued growth for high-fruit content and low-sugar juice products
- New product launches and consumer awareness maintain market relevance

CATEGORY DATA

Table 81 - Off-trade Sales of Juice by Category: Volume 2019-2024

Table 82 - Off-trade Sales of Juice by Category: Value 2019-2024

Table 83 - Off-trade Sales of Juice by Category: % Volume Growth 2019-2024

Table 84 - Off-trade Sales of Juice by Category: % Value Growth 2019-2024

Table 85 - NBO Company Shares of Off-trade Juice: % Volume 2020-2024

Table 86 - LBN Brand Shares of Off-trade Juice: % Volume 2021-2024

Table 87 - NBO Company Shares of Off-trade Juice: % Value 2020-2024

Table 88 - LBN Brand Shares of Off-trade Juice: % Value 2021-2024

Table 89 - Forecast Off-trade Sales of Juice by Category: Volume 2024-2029

Table 90 - Forecast Off-trade Sales of Juice by Category: Value 2024-2029

Table 91 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029

Table 92 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

## RTD Coffee in Bosnia and Herzegovina

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Steady demand driven by convenience and impulse buying

Limited brand availability constrains market expansion

E-commerce fuels premiumisation and brand diversity

#### PROSPECTS AND OPPORTUNITIES

Sustained growth across retail and on-trade channels

Portfolio expansion and channel innovation to drive growth

Demographic changes and consumer trends favour RTD coffee

#### CATEGORY DATA

Table 93 - Off-trade Sales of RTD Coffee: Volume 2019-2024

Table 94 - Off-trade Sales of RTD Coffee: Value 2019-2024

Table 95 - Off-trade Sales of RTD Coffee: % Volume Growth 2019-2024

Table 96 - Off-trade Sales of RTD Coffee: % Value Growth 2019-2024

Table 97 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2020-2024

Table 98 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2021-2024

Table 99 - NBO Company Shares of Off-trade RTD Coffee: % Value 2020-2024

Table 100 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2021-2024

Table 101 - Forecast Off-trade Sales of RTD Coffee: Volume 2024-2029

Table 102 - Forecast Off-trade Sales of RTD Coffee: Value 2024-2029

Table 103 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2024-2029

Table 104 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2024-2029

## RTD Tea in Bosnia and Herzegovina

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Consumer shift towards convenience and on-the-go consumption drives growth

Health and wellness trends boost reduced sugar options

Carbonated RTD tea remains marginal while reduced sugar gains ground

#### PROSPECTS AND OPPORTUNITIES

Mature market faces slower growth but retains stability

Health and wellness trends continue to reshape consumer preferences

Convenience and packaging innovation drive impulse sales

## CATEGORY DATA

Table 105 - Off-trade Sales of RTD Tea by Category: Volume 2019-2024

Table 106 - Off-trade Sales of RTD Tea by Category: Value 2019-2024

Table 107 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024

Table 108 - Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024

Table 109 - NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024

Table 110 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024

Table 111 - NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024

Table 112 - LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024

Table 113 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029

Table 114 - Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029

Table 115 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029

Table 116 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

## Energy Drinks in Bosnia and Herzegovina

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Stable post-pandemic recovery supported by strong consumer demand

Red Bull's dominance reinforced by strategic branding and pricing

Second-tier brands competing with price-sensitive strategies

### PROSPECTS AND OPPORTUNITIES

Sustained growth amidst busy and social lifestyles

Red Bull's continued reign and targeted consumer appeal

E-commerce as a growth catalyst for smaller players

## CATEGORY DATA

Table 117 - Off-trade Sales of Energy Drinks: Volume 2019-2024

Table 118 - Off-trade Sales of Energy Drinks: Value 2019-2024

Table 119 - Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024

Table 120 - Off-trade Sales of Energy Drinks: % Value Growth 2019-2024

Table 121 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024

Table 122 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024

Table 123 - NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024

Table 124 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024

Table 125 - Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029

Table 126 - Forecast Off-trade Sales of Energy Drinks: Value 2024-2029

Table 127 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029

Table 128 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

## Sports Drinks in Bosnia and Herzegovina

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Stability in sales driven by fitness and youth engagement

Dominance of established brands amidst rising economy competitors

Social media and fitness trends expand consumer base

### PROSPECTS AND OPPORTUNITIES

Accelerating demand and growth post-pandemic

Sustained dominance of leading brands

## CATEGORY DATA

Table 129 - Off-trade Sales of Sports Drinks: Volume 2019-2024

Table 130 - Off-trade Sales of Sports Drinks: Value 2019-2024

Table 131 - Off-trade Sales of Sports Drinks: % Volume Growth 2019-2024

Table 132 - Off-trade Sales of Sports Drinks: % Value Growth 2019-2024

Table 133 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2020-2024

Table 134 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2021-2024

Table 135 - NBO Company Shares of Off-trade Sports Drinks: % Value 2020-2024

Table 136 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2021-2024

Table 137 - Forecast Off-trade Sales of Sports Drinks: Volume 2024-2029

Table 138 - Forecast Off-trade Sales of Sports Drinks: Value 2024-2029

Table 139 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029

Table 140 - Forecast Off-trade Sales of Sports Drinks: % 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/soft-drinks-in-bosnia-and-herzegovina/report](https://www.euromonitor.com/soft-drinks-in-bosnia-and-herzegovina/report).