



Tissue and Hygiene in Bosnia and Herzegovina

March 2025

Table of Contents

EXECUTIVE SUMMARY

Tissue and hygiene in 2024: The big picture
2024 key trends
Competitive landscape
Retail developments
What next for tissue and hygiene?

MARKET INDICATORS

Table 1 - Birth Rates 2019-2024
Table 2 - Infant Population 2019-2024
Table 3 - Female Population by Age 2019-2024
Table 4 - Total Population by Age 2019-2024
Table 5 - Households 2019-2024
Table 6 - Forecast Infant Population 2024-2029
Table 7 - Forecast Female Population by Age 2024-2029
Table 8 - Forecast Total Population by Age 2024-2029
Table 9 - Forecast Households 2024-2029

MARKET DATA

Table 10 - Retail Sales of Tissue and Hygiene by Category: Value 2019-2024
Table 11 - Retail Sales of Tissue and Hygiene by Category: % Value Growth 2019-2024
Table 12 - NBO Company Shares of Retail Tissue and Hygiene: % Value 2020-2024
Table 13 - LBN Brand Shares of Retail Tissue and Hygiene: % Value 2021-2024
Table 14 - Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2019-2024
Table 15 - Distribution of Retail Tissue and Hygiene by Format: % Value 2019-2024
Table 16 - Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2024
Table 17 - Forecast Retail Sales of Tissue and Hygiene by Category: Value 2024-2029
Table 18 - Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Away-From-Home Tissue and Hygiene in Bosnia and Herzegovina

KEY DATA FINDINGS

2024 DEVELOPMENTS

Horeca recovery and increased hygiene concerns support growth
Rising investment and demand fuel growth of AFH adult incontinence
Institutions increase their spending on AFH tissue products to meet growing expectations

PROSPECTS AND OPPORTUNITIES

Increased investment to drive future growth
Strong growth of e-commerce will support online sales
Manufacturers will increasingly prioritise efficient and eco-friendly packaging

CATEGORY DATA

Table 19 - Sales of Away-From-Home Tissue and Hygiene by Category: Value 2019-2024
Table 20 - Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2019-2024
Table 21 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2019-2024

Table 22 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2024

Table 23 - Sales of Forecast Away-From-Home Tissue and Hygiene by Category: Value 2024-2029

Table 24 - Sales of Forecast Away-From-Home Tissue and Hygiene by Category: % Value Growth 2024-2029

Retail Adult Incontinence in Bosnia and Herzegovina

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Ageing population drives growth in 2024
- Violeta doo benefits from strong loyalty to local brands
- Health and beauty specialists offer a broad and expanding product range

PROSPECTS AND OPPORTUNITIES

- Retail adult incontinence faces stagnant volume sales
- Significant e-commerce growth anticipated
- Growth of sustainable options and private label

CATEGORY DATA

Table 25 - Sales of Retail Adult Incontinence by Category: Value 2019-2024

Table 26 - Sales of Retail Adult Incontinence by Category: % Value Growth 2019-2024

Table 27 - NBO Company Shares of Retail Adult Incontinence: % Value 2020-2024

Table 28 - LBN Brand Shares of Retail Adult Incontinence: % Value 2021-2024

Table 29 - Forecast Sales of Retail Adult Incontinence by Category: Value 2024-2029

Table 30 - Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2024-2029

Nappies/Diapers/Pants in Bosnia and Herzegovina

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Challenge of price rises and falling birth rates
- Violeta doo retains its lead due to the strong performance of its eponymous brand
- Health and beauty specialists offer a broad range of products and promotions

PROSPECTS AND OPPORTUNITIES

- Nappies/diapers/pants impacted by declining birth rates
- E-commerce growth to remain strong throughout the forecast period
- Innovation focus on sustainability, skin health and comfort

CATEGORY DATA

Table 31 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2019-2024

Table 32 - Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2019-2024

Table 33 - NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2020-2024

Table 34 - LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2021-2024

Table 35 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2024-2029

Table 36 - Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2024-2029

Menstrual Care in Bosnia and Herzegovina

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Innovation and subsiding inflation support stable growth in 2024
- Procter & Gamble leads with strong brands and innovation

Health and beauty specialists lead; however, chained modern grocery retailers are on the rise

PROSPECTS AND OPPORTUNITIES

- Limited growth potential in the face of population decline
- E-commerce expansion
- Innovation to appeal to increasingly discerning consumers

CATEGORY DATA

- Table 37 - Retail Sales of Menstrual Care by Category: Value 2019-2024
- Table 38 - Retail Sales of Menstrual Care by Category: % Value Growth 2019-2024
- Table 39 - NBO Company Shares of Retail Menstrual Care: % Value 2020-2024
- Table 40 - LBN Brand Shares of Retail Menstrual Care: % Value 2021-2024
- Table 41 - Forecast Retail Sales of Menstrual Care by Category: Value 2024-2029
- Table 42 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2024-2029

Wipes in Bosnia and Herzegovina

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Convenience trend and increased hygiene concerns support growth in 2024
- Violeta maintains its clear lead despite strong private label expansion
- Health and beauty specialists appeal, offering a wider range of products and significant discounts

PROSPECTS AND OPPORTUNITIES

- Rising hygiene concerns and premiumisation will support value growth
- Further investment in e-commerce
- Innovation focus on eco- and skin-friendly wipes

CATEGORY DATA

- Table 43 - Retail Sales of Wipes by Category: Value 2019-2024
- Table 44 - Retail Sales of Wipes by Category: % Value Growth 2019-2024
- Table 45 - NBO Company Shares of Retail Wipes: % Value 2020-2024
- Table 46 - LBN Brand Shares of Retail Wipes: % Value 2021-2024
- Table 47 - Forecast Retail Sales of Wipes by Category: Value 2024-2029
- Table 48 - Forecast Retail Sales of Wipes by Category: % Value Growth 2024-2029

Retail Tissue in Bosnia and Herzegovina

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Price increases continue to put pressure on local consumers
- Violeta doo benefits from its longstanding market presence and strong consumer loyalty
- Convenient small local grocers lead despite the expansion of modern grocery retailers

PROSPECTS AND OPPORTUNITIES

- Sales supported by convenience trend and premiumisation
- Dominance of small grocery retailers will be challenged
- Consumer focus on sustainability and environmental protection

CATEGORY DATA

- Table 49 - Retail Sales of Tissue by Category: Value 2019-2024
- Table 50 - Retail Sales of Tissue by Category: % Value Growth 2019-2024
- Table 51 - NBO Company Shares of Retail Tissue: % Value 2020-2024

Table 52 - LBN Brand Shares of Retail Tissue: % Value 2021-2024

Table 53 - Forecast Retail Sales of Tissue by Category: Value 2024-2029

Table 54 - Forecast Retail Sales of Tissue by Category: % 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/tissue-and-hygiene-in-bosnia-and-herzegovina/report.