



Euromonitor
International

Carbonates in Bosnia and Herzegovina

December 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health and wellness trend continues to impact demand

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

Sarajevski Kiseljak's brands enjoy a high level of trust

CHANNELS

Consumers value the convenience of small local grocers

Robust growth of convenient e-commerce

CATEGORY DATA

Table 1 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 3 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 4 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 5 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 6 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 7 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 8 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 9 - Sales of Carbonates by Total Fountain On-trade: Volume 2020-2025

Table 10 - Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2020-2025

Table 11 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 12 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 13 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 14 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 15 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 16 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 17 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 18 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 19 - Forecast Sales of Carbonates by Total Fountain On-trade: Volume 2025-2030

Table 20 - Forecast Sales of Carbonates by Total Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Soft Drinks in Bosnia and Herzegovina - Industry Overview](#)

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

CHANNELS

Supermarkets strengthen their leadership

Retail e-commerce sees dynamic growth

Foodservice vs retail split

MARKET DATA

Table 21 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 22 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 24 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 25 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 26 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 27 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 28 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 29 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 30 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 31 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 32 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 33 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 34 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 35 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 36 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 37 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 38 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 39 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 40 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 41 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 42 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 43 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 44 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 45 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 46 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 47 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 48 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 49 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 50 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 51 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 52 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

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/carbonates-in-bosnia-and-herzegovina/report.