

Retail in Bosnia and Herzegovina

April 2023

Table of Contents

EXECUTIVE SUMMARY

Retail in 2022: The big picture

Informal retail

What next for retail?

MARKET DATA

Table 1 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2017-2022

Table 2 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2017-2022

Table 3 - Sales in Retail Offline by Channel: Value 2017-2022

Table 4 - Sales in Retail Offline by Channel: % Value Growth 2017-2022

Table 5 - Retail Offline Outlets by Channel: Units 2017-2022

Table 6 - Retail Offline Outlets by Channel: % Unit Growth 2017-2022

Table 7 - Retail GBO Company Shares: % Value 2018-2022

Table 8 - Retail GBN Brand Shares: % Value 2019-2022

Table 9 - Retail Offline GBO Company Shares: % Value 2018-2022

Table 10 - Retail Offline GBN Brand Shares: % Value 2019-2022

Table 11 - Retail Offline LBN Brand Shares: Outlets 2019-2022

Table 12 - Retail E-Commerce GBO Company Shares: % Value 2018-2022

Table 13 - Retail E-Commerce GBN Brand Shares: % Value 2019-2022

Table 14 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2022-2027

Table 15 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2022-2027

Table 16 - Forecast Sales in Retail Offline by Channel: Value 2022-2027

Table 17 - Forecast Sales in Retail Offline by Channel: % Value Growth 2022-2027

Table 18 - Forecast Retail Offline Outlets by Channel: Units 2022-2027

Table 19 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Grocery Retailers in Bosnia and Herzegovina

KEY DATA FINDINGS

2022 DEVELOPMENTS

Modern grocery retailers outperform small local grocers

Bingo continues to hold strong lead

Lidl postponed opening but Belamionix and Crvena Jabuka commit

PROSPECTS AND OPPORTUNITIES

Future uncertain

Hypermarkets strongest performer over forecast period

Modern grocery retailers continue to grow strongly and make further gains from traditional grocery retailers

CHANNEL DATA

Table 20 - Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022

Table 21 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022

Table 22 - Sales in Grocery Retailers by Channel: Value 2017-2022

Table 23 - Sales in Grocery Retailers by Channel: % Value Growth 2017-2022

Table 24 - Grocery Retailers Outlets by Channel: Units 2017-2022

Table 25 - Grocery Retailers Outlets by Channel: % Unit Growth 2017-2022

Table 26 - Grocery Retailers GBO Company Shares: % Value 2018-2022

Table 27 - Grocery Retailers GBN Brand Shares: % Value 2019-2022

Table 28 - Grocery Retailers LBN Brand Shares: Outlets 2019-2022

Table 29 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027

Table 30 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027

Table 31 - Forecast Sales in Grocery Retailers by Channel: Value 2022-2027

Table 32 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2022-2027

Table 33 - Forecast Grocery Retailers Outlets by Channel: Units 2022-2027

Table 34 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027

Non-Grocery Retailers in Bosnia and Herzegovina

KEY DATA FINDINGS

2022 DEVELOPMENTS

Minimal constant value growth, as inflation bites

International chains slowly gaining foothold

E-commerce continues to grow at pace

PROSPECTS AND OPPORTUNITIES

Price sensitivity influences shopping behaviour over forecast period

Variety stores see significant growth, though from small base

Consumers increasingly environmentally conscious

CHANNEL DATA

Table 35 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022

Table 36 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022

Table 37 - Non-Grocery Retailers GBO Company Shares: % Value 2018-2022

Table 38 - Non-Grocery Retailers GBN Brand Shares: % Value 2019-2022

Table 39 - Non-Grocery Retailers LBN Brand Shares: Outlets 2019-2022

Table 40 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027

Table 41 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027

Table 42 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2022-2027

Table 43 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2022-2027

Table 44 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2022-2027

Table 45 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027

Direct Selling in Bosnia and Herzegovina

KEY DATA FINDINGS

2022 DEVELOPMENTS

Direct selling losing out to e-commerce

Landscape becoming more competitive

Large international companies dominate the channel

PROSPECTS AND OPPORTUNITIES

Muted constant value growth over forecast period

Avon, Farmasi and Oriflame set to see a stronger challenge within direct selling

Shift to digital strategies as direct sellers adapt to remain competitive

CHANNEL DATA

Table 46 - Direct Selling by Product: Value 2017-2022

Table 47 - Direct Selling by Product: % Value Growth 2017-2022

Table 48 - Direct Selling GBO Company Shares: % Value 2018-2022

Table 49 - Direct Selling GBN Brand Shares: % Value 2019-2022

Table 50 - Direct Selling Forecasts by Product: Value 2022-2027

Table 51 - Direct Selling Forecasts by Product: % Value Growth 2022-2027

Retail E-Commerce in Bosnia and Herzegovina

KEY DATA FINDINGS

2022 DEVELOPMENTS

Continued growth, though value sales still low

Global online marketplaces dominate the competitive landscape in Bosnia and Herzegovina

Online pharmacy chain Apotekamo has eyes on expansion

PROSPECTS AND OPPORTUNITIES

Continued growth over forecast period

Younger population and digital nomads will drive growth of e-commerce

Consumers need to gain trust

CHANNEL DATA

Table 52 - Retail E-Commerce by Product: Value 2017-2022

Table 53 - Retail E-Commerce by Product: % Value Growth 2017-2022

Table 54 - Retail E-Commerce GBO Company Shares: % Value 2018-2022

Table 55 - Retail E-Commerce GBN Brand Shares: % Value 2019-2022

Table 56 - Forecast Retail E-Commerce by Product: Value 2022-2027

Table 57 - Forecast Retail E-Commerce by Product: % Value Growth 2022-2027

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