



Hot Drinks in Bosnia and Herzegovina

December 2025

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EXECUTIVE SUMMARY

Demographic trends continue to constrain growth potential

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Rising prices force consumers to trade down

Health and wellness and convenience trends influence purchasing decisions

Foodservice for drinks that cannot be easily prepared at home

WHAT'S NEXT?

Impact of maturity and declining population

Competitive landscape to remain stable, with niche categories attracting new entrants

Retail e-commerce to remain the fastest growing distribution channel

COMPETITIVE LANDSCAPE

Atlantic Grand leads with a strong brand portfolio

Mondelez International benefits from the strong performance of Milka Choco Drink

CHANNELS

Supermarkets strengthen their leadership in hot drinks distribution

Retail e-commerce sees dynamic growth, while vending remains limited

Foodservice vs retail split

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[Coffee in Bosnia and Herzegovina](#)

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2025 DEVELOPMENTS

Premiumisation helps sustain solid growth

INDUSTRY PERFORMANCE

Coffee continues to demonstrate resilience

Convenience and high-quality brands drive robust growth of instant coffee

WHAT'S NEXT?

Younger consumers help stabilise the hot drinks consumer base

Renowned brands expand into coffee beans

New waste management regulations impact the coffee market

COMPETITIVE LANDSCAPE

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KEY DATA FINDINGS

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WHAT'S NEXT?

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COMPETITIVE LANDSCAPE

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Growth despite demographic challenges

Emergence of pods and capsules as a transformative trend

WHAT'S NEXT?

Demographic trends constrain future growth potential

Innovation to focus on healthier options and new flavours

Impact of new regulations

COMPETITIVE LANDSCAPE

Nestlé leads with its renowned and trusted Nesquik brand

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