

Carbonates in Bosnia and Herzegovina

December 2025

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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

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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

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