



Concentrates in Bosnia and Herzegovina

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Shifting consumer preferences

INDUSTRY PERFORMANCE

Waning demand for liquid concentrates amid health-conscious shifts
Powder concentrates sustain popularity with health-associated appeal

WHAT'S NEXT?

Further decline as liquid concentrates lose their appeal
Improving supply chain traceability increasingly important
Rising consumer demand for cleaner, more natural products

COMPETITIVE LANDSCAPE

Fructal maintains strong consumer loyalty
Frupi's broad selection drives growth of Biolife in 2025

CHANNELS

Small local grocers lead with their dense network of conveniently located outlets
Convenient e-commerce records the strongest growth
Concentrates Conversions
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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

CHANNELS

Supermarkets strengthen their leadership
Retail e-commerce sees dynamic growth
Foodservice vs retail split

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