



Alcoholic Drinks in Bosnia and Herzegovina

June 2024

Table of Contents

EXECUTIVE SUMMARY

Alcoholic drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

TAXATION AND DUTY LEVIES

Summary 1 - Taxation and Duty Levies on Alcoholic Drinks 2023

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 1 - Retail Consumer Expenditure on Alcoholic Drinks 2018-2023

MARKET DATA

Table 2 - Sales of Alcoholic Drinks by Category: Total Volume 2018-2023

Table 3 - Sales of Alcoholic Drinks by Category: Total Value 2018-2023

Table 4 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2018-2023

Table 5 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2018-2023

Table 6 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2023

Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2023

Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2023

Table 9 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2023

Table 10 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2019-2023

Table 11 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2018-2023

Table 12 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2023

Table 13 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2023-2028

Table 14 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2023-2028

Table 15 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2023-2028

Table 16 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Beer in Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Market saturation and price pressures
Demographic changes and market constraints
E-commerce expansion and niche beer emergence

PROSPECTS AND OPPORTUNITIES

Resilience and consumer rebound
Revitalisation of imported lager
Innovation and market differentiation

CATEGORY BACKGROUND

Lager price band methodology
Summary 3 - Lager by Price Band 2023
Table 17 - Number of Breweries 2018-2023

CATEGORY DATA

Table 18 - Sales of Beer by Category: Total Volume 2018-2023
Table 19 - Sales of Beer by Category: Total Value 2018-2023
Table 20 - Sales of Beer by Category: % Total Volume Growth 2018-2023
Table 21 - Sales of Beer by Category: % Total Value Growth 2018-2023
Table 22 - Sales of Beer by Off-trade vs On-trade: Volume 2018-2023
Table 23 - Sales of Beer by Off-trade vs On-trade: Value 2018-2023
Table 24 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 25 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2018-2023
Table 26 - GBO Company Shares of Beer: % Total Volume 2019-2023
Table 27 - NBO Company Shares of Beer: % Total Volume 2019-2023
Table 28 - LBN Brand Shares of Beer: % Total Volume 2019-2023
Table 29 - Forecast Sales of Beer by Category: Total Volume 2023-2028
Table 30 - Forecast Sales of Beer by Category: Total Value 2023-2028
Table 31 - Forecast Sales of Beer by Category: % Total Volume Growth 2023-2028
Table 32 - Forecast Sales of Beer by Category: % Total Value Growth 2023-2028

Cider/Perry in Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volatile consumer demand
Cider/perry remains a minor alcoholic drinks category
Innovation and new product development

PROSPECTS AND OPPORTUNITIES

Stable growth amidst demographic challenges
Limited brand choice is hindrance to category growth
Younger generations will remain core cider/perry drinkers

CATEGORY DATA

Table 33 - Sales of Cider/Perry: Total Volume 2018-2023
Table 34 - Sales of Cider/Perry: Total Value 2018-2023
Table 35 - Sales of Cider/Perry: % Total Volume Growth 2018-2023

Table 36 - Sales of Cider/Perry: % Total Value Growth 2018-2023
Table 37 - Sales of Cider/Perry: Total Volume 2019-2023
Table 38 - Sales of Cider/Perry: Total Value 2019-2023
Table 39 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2018-2023
Table 40 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2018-2023
Table 41 - Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 42 - Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2018-2023
Table 43 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2019-2023
Table 44 - Sales of Cider/Perry by Off-trade vs On-trade: Value 2019-2023
Table 45 - GBO Company Shares of Cider/Perry: % Total Volume 2019-2023
Table 46 - NBO Company Shares of Cider/Perry: % Total Volume 2019-2023
Table 47 - LBN Brand Shares of Cider/Perry: % Total Volume 2019-2023
Table 48 - Forecast Sales of Cider/Perry: Total Volume 2023-2028
Table 49 - Forecast Sales of Cider/Perry: Total Value 2023-2028
Table 50 - Forecast Sales of Cider/Perry: % Total Volume Growth 2023-2028
Table 51 - Forecast Sales of Cider/Perry: % Total Value Growth 2023-2028

Rtds in Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Convenience and rising prices drive growth
RTDs still very much a niche area
Diageo maintains strong lead

PROSPECTS AND OPPORTUNITIES

Moderation in volume growth
Diageo's continued dominance
E-commerce sales to gain ground

CATEGORY DATA

Table 52 - Sales of RTDs by Category: Total Volume 2018-2023
Table 53 - Sales of RTDs by Category: Total Value 2018-2023
Table 54 - Sales of RTDs by Category: % Total Volume Growth 2018-2023
Table 55 - Sales of RTDs by Category: % Total Value Growth 2018-2023
Table 56 - Sales of RTDs by Off-trade vs On-trade: Volume 2018-2023
Table 57 - Sales of RTDs by Off-trade vs On-trade: Value 2018-2023
Table 58 - Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 59 - Sales of RTDs by Off-trade vs On-trade: % Value Growth 2018-2023
Table 60 - GBO Company Shares of RTDs: % Total Volume 2019-2023
Table 61 - NBO Company Shares of RTDs: % Total Volume 2019-2023
Table 62 - LBN Brand Shares of RTDs: % Total Volume 2019-2023
Table 63 - Forecast Sales of RTDs by Category: Total Volume 2023-2028
Table 64 - Forecast Sales of RTDs by Category: Total Value 2023-2028
Table 65 - Forecast Sales of RTDs by Category: % Total Volume Growth 2023-2028
Table 66 - Forecast Sales of RTDs by Category: % Total Value Growth 2023-2028

Spirits in Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Declining consumer demand

Rising popularity of whiskies and gin
Expansion through e-commerce

PROSPECTS AND OPPORTUNITIES

Moderate rebound and growth
Growth in cream-based liqueurs and dark rum
Continued expansion of e-commerce sales

CATEGORY DATA

Table 67 - Sales of Spirits by Category: Total Volume 2018-2023
Table 68 - Sales of Spirits by Category: Total Value 2018-2023
Table 69 - Sales of Spirits by Category: % Total Volume Growth 2018-2023
Table 70 - Sales of Spirits by Category: % Total Value Growth 2018-2023
Table 71 - Sales of Spirits by Off-trade vs On-trade: Volume 2018-2023
Table 72 - Sales of Spirits by Off-trade vs On-trade: Value 2018-2023
Table 73 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 74 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2018-2023
Table 75 - GBO Company Shares of Spirits: % Total Volume 2019-2023
Table 76 - NBO Company Shares of Spirits: % Total Volume 2019-2023
Table 77 - LBN Brand Shares of Spirits: % Total Volume 2019-2023
Table 78 - Forecast Sales of Spirits by Category: Total Volume 2023-2028
Table 79 - Forecast Sales of Spirits by Category: Total Value 2023-2028
Table 80 - Forecast Sales of Spirits by Category: % Total Volume Growth 2023-2028
Table 81 - Forecast Sales of Spirits by Category: % Total Value Growth 2023-2028

Wine in Bosnia and Herzegovina

KEY DATA FINDINGS

2023 DEVELOPMENTS

Premiumisation trend continues
Perceived health benefits drive wine appeal
Domestic innovation and product development

PROSPECTS AND OPPORTUNITIES

Stable consumption patterns
Continued premiumisation
Stability amidst demographic shifts

CATEGORY DATA

Table 82 - Sales of Wine by Category: Total Volume 2018-2023
Table 83 - Sales of Wine by Category: Total Value 2018-2023
Table 84 - Sales of Wine by Category: % Total Volume Growth 2018-2023
Table 85 - Sales of Wine by Category: % Total Value Growth 2018-2023
Table 86 - Sales of Wine by Off-trade vs On-trade: Volume 2018-2023
Table 87 - Sales of Wine by Off-trade vs On-trade: Value 2018-2023
Table 88 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2018-2023
Table 89 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2018-2023
Table 90 - Forecast Sales of Wine by Category: Total Volume 2023-2028
Table 91 - Forecast Sales of Wine by Category: Total Value 2023-2028
Table 92 - Forecast Sales of Wine by Category: % Total Volume Growth 2023-2028
Table 93 - Forecast Sales of Wine by Category: % Total Value Growth 2023-2028

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/alcoholic-drinks-in-bosnia-and-herzegovina/report.