

Soft Drinks in Bulgaria

December 2023

Table of Contents

Soft Drinks in Bulgaria

EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

- Table 1 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023
- Table 2 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023
- Table 3 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023
- Table 4 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023
- Table 5 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2022
- Table 6 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2022
- Table 7 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2022
- Table 8 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2022
- Table 9 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023
- Table 10 Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023
- Table 11 Off-trade Sales of Soft Drinks by Category: Value 2018-2023
- Table 12 Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023
- Table 13 Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023
- Table 14 Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023
- Table 15 NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023
- Table 16 LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023
- Table 17 NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023
- Table 18 LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023
- Table 19 Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023
- Table 20 Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023
- Table 21 Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023
- Table 22 Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023
- Table 23 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028
- Table 24 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028
- Table 25 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028
- Table 26 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028
- Table 27 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028
- Table 28 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028
- Table 29 Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028
- Table 30 Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028
- Table 31 Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028
- Table 32 Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

APPENDIX

Fountain sales in Bulgaria

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Bottled Water in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Carbonated water evolves as health trends persist Investment in innovation and sustainability

Functional bottled water is rising

PROSPECTS AND OPPORTUNITIES

Rising demand and diversification forecast

Competition to intensify as demand becomes more sophisticated

Big brands will see further benefit as e-commerce goes from strength to strength

CATEGORY DATA

Table 33 - Off-trade Sales of Bottled Water by Category: Volume 2018-2023

Table 34 - Off-trade Sales of Bottled Water by Category: Value 2018-2023

Table 35 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023

Table 36 - Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023

Table 37 - NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023

Table 38 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023

Table 39 - NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023

Table 40 - LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023

Table 41 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028

Table 42 - Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028

Table 43 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028

Table 44 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

Carbonates in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price sensitivity rises in face of inflation

Reduced sugar carbonates gains further ground

Gin and tonic trend prompts premiumisation

PROSPECTS AND OPPORTUNITIES

Carbonates faces intensifying competition from healthier and trendier alternatives

Continued rise for reduced sugar carbonates

Players will invest in portfolio optimisation and expansion

CATEGORY DATA

Table 45 - Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023

Table 46 - Off-trade vs On-trade Sales of Carbonates: Value 2018-2023

Table 47 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023

Table 48 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023

Table 49 - Off-trade Sales of Carbonates by Category: Volume 2018-2023

Table 50 - Off-trade Sales of Carbonates by Category: Value 2018-2023

Table 51 - Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023

Table 52 - Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023

Table 53 - Total Sales of Carbonates by Fountain On-trade: Volume 2018-2023

Table 54 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2018-2023

Table 55 - NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023

Table 56 - LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023

Table 57 - NBO Company Shares of Off-trade Carbonates: % Value 2019-2023

- Table 58 LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023
- Table 59 Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028
- Table 60 Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028
- Table 61 Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028
- Table 62 Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028
- Table 63 Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2023-2028
- Table 64 Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2023-2028

Concentrates in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Health concerns prevent positive growth despite cost-friendly appeal of concentrates

Organic liquid concentrates offer some hope

Herbal dietary supplements further undermine demand for powder concentrates

PROSPECTS AND OPPORTUNITIES

Demand to continue declining for concentrates

Sustainability may provide differentiation, while liquid concentrates will continue to outperform powder Functional expansion amid market stagnation

CATEGORY DATA

Concentrates Conversions

- Summary 2 Concentrates Conversion Factors for Ready-to-Drink (RTD) Format
- Table 65 Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023
- Table 66 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023
- Table 67 Off-trade Sales of Concentrates by Category: Value 2018-2023
- Table 68 Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023
- Table 69 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023
- Table 70 NBO Company Shares of Off-trade Concentrates: % Value 2019-2023
- Table 71 LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023
- Table 72 NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023
- Table 73 LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023
- Table 74 NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2023
- Table 75 LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2023
- Table 76 Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028
- Table 77 Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028
- Table 78 Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028
- Table 79 Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

Juice in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Steady growth for juice overall amid economic pressures

Trading down increases along with health-oriented shifts

Cappy and Queen's remain on top in strongly competitive landscape

PROSPECTS AND OPPORTUNITIES

Players to focus on optimisation as health trends continue to inform innovation

Niche areas will see further expansion

Increased prevalence of promotional strategies and price sensitivity

CATEGORY DATA

- Table 80 Off-trade Sales of Juice by Category: Volume 2018-2023
- Table 81 Off-trade Sales of Juice by Category: Value 2018-2023
- Table 82 Off-trade Sales of Juice by Category: % Volume Growth 2018-2023
- Table 83 Off-trade Sales of Juice by Category: % Value Growth 2018-2023
- Table 84 NBO Company Shares of Off-trade Juice: % Volume 2019-2023
- Table 85 LBN Brand Shares of Off-trade Juice: % Volume 2020-2023
- Table 86 NBO Company Shares of Off-trade Juice: % Value 2019-2023
- Table 87 LBN Brand Shares of Off-trade Juice: % Value 2020-2023
- Table 88 Forecast Off-trade Sales of Juice by Category: Volume 2023-2028
- Table 89 Forecast Off-trade Sales of Juice by Category: Value 2023-2028
- Table 90 Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028
- Table 91 Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

RTD Coffee in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Younger consumers show rising interest though seasonality limits growth Growth remains subject to economic pressures and distribution dynamics International brands rule competitive landscape of RTD coffee in Bulgaria

PROSPECTS AND OPPORTUNITIES

Growth potential remains with innovative developments expected during forecast period Foodservice to continue to present challenges, while domestic players may gain ground E-Commerce will keep on rising

CATEGORY DATA

- Table 92 Off-trade Sales of RTD Coffee: Volume 2018-2023
- Table 93 Off-trade Sales of RTD Coffee: Value 2018-2023
- Table 94 Off-trade Sales of RTD Coffee: % Volume Growth 2018-2023
- Table 95 Off-trade Sales of RTD Coffee: % Value Growth 2018-2023
- Table 96 NBO Company Shares of Off-trade RTD Coffee: % Volume 2019-2023
- Table 97 LBN Brand Shares of Off-trade RTD Coffee: % Volume 2020-2023
- Table 98 NBO Company Shares of Off-trade RTD Coffee: % Value 2019-2023
- Table 99 LBN Brand Shares of Off-trade RTD Coffee: % Value 2020-2023
- Table 100 Forecast Off-trade Sales of RTD Coffee: Volume 2023-2028
- Table 101 Forecast Off-trade Sales of RTD Coffee: Value 2023-2028
- Table 102 Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2023-2028
- Table 103 Forecast Off-trade Sales of RTD Coffee: % Value Growth 2023-2028

RTD Tea in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Seasonality presents challenges while health trends support sales Reduced sugar variants in demand

RTD tea benefits from wide distribution and new product development

PROSPECTS AND OPPORTUNITIES

Reduced sugar RTD tea will see rising demand

Variety and innovation drive demand

Expansion for private label and distribution channels

CATEGORY DATA

- Table 104 Off-trade Sales of RTD Tea by Category: Volume 2018-2023
- Table 105 Off-trade Sales of RTD Tea by Category: Value 2018-2023
- Table 106 Off-trade Sales of RTD Tea by Category: % Volume Growth 2018-2023
- Table 107 Off-trade Sales of RTD Tea by Category: % Value Growth 2018-2023
- Table 108 Leading Flavours for Off-trade RTD Tea: % Volume 2018-2023
- Table 109 NBO Company Shares of Off-trade RTD Tea: % Volume 2019-2023
- Table 110 LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2023
- Table 111 NBO Company Shares of Off-trade RTD Tea: % Value 2019-2023
- Table 112 LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2023
- Table 113 Forecast Off-trade Sales of RTD Tea by Category: Volume 2023-2028
- Table 114 Forecast Off-trade Sales of RTD Tea by Category: Value 2023-2028
- Table 115 Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2023-2028
- Table 116 Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2023-2028

Energy Drinks in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Energy drinks enjoys strong growth in both foodservice and retail channels

Flavour innovation continues to sustain sales, while Hell Energy Drink maintains leadership

Distribution to expand amid persistent shift towards healthier alternatives

PROSPECTS AND OPPORTUNITIES

Reduced sugar options to gain ground

E-Commerce will continue to expand as competition intensifies

Growth will slow as category approaches maturity, with on-trade rising faster than off-trade sales

CATEGORY DATA

- Table 117 Off-trade Sales of Energy Drinks: Volume 2018-2023
- Table 118 Off-trade Sales of Energy Drinks: Value 2018-2023
- Table 119 Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023
- Table 120 Off-trade Sales of Energy Drinks: % Value Growth 2018-2023
- Table 121 NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023
- Table 122 LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023
- Table 123 NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023
- Table 124 LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023
- Table 125 Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028
- Table 126 Forecast Off-trade Sales of Energy Drinks: Value 2023-2028
- Table 127 Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028
- Table 128 Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

Sports Drinks in Bulgaria

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising interest in fitness and hydration sustains further growth in 2023

Players face distribution challenges and low awareness

Innovation accelerates with more products and players

PROSPECTS AND OPPORTUNITIES

Growth to be spurred by rising sports culture and education

Players should invest more in marketing, though economic woes may curtail growth

New entrants expected to enter the fray as cross-category competition intensifies

CATEGORY DATA

Table 129 - Off-trade Sales of Sports Drinks: Volume 2018-2023

Table 130 - Off-trade Sales of Sports Drinks: Value 2018-2023

Table 131 - Off-trade Sales of Sports Drinks: % Volume Growth 2018-2023

Table 132 - Off-trade Sales of Sports Drinks: % Value Growth 2018-2023

Table 133 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2019-2023

Table 134 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2020-2023

Table 135 - NBO Company Shares of Off-trade Sports Drinks: % Value 2019-2023

Table 136 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2020-2023

Table 137 - Forecast Off-trade Sales of Sports Drinks: Volume 2023-2028

Table 138 - Forecast Off-trade Sales of Sports Drinks: Value 2023-2028

Table 139 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2023-2028

Table 140 - Forecast Off-trade Sales of Sports Drinks: % 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/soft-drinks-in-bulgaria/report.