Euromonitor International

# Hot Drinks in Bulgaria

December 2025

Table of Contents

## Hot Drinks in Bulgaria

EXECUTIVE SUMMARY

KEY DATA FINDINGS

KEY INDUSTRY TRENDS

INDUSTRY PERFORMANCE

High inflation dampens purchasing power, leading local consumers to seek discounts and promotions
Demand for novel flavours and varieties increases
Functionality and wellness trends continue to shape innovation

WHAT'S NEXT?

Prices expected to continue rising, driving promotions and discounting
Premiumisation trend will continue, despite general price-sensitivity
Wellness trend and increased awareness will intensify demand for low-sugar formulations

COMPETITIVE LANDSCAPE

Nestlé maintains its lead, despite fierce competition
Tchibo gains ground by focusing on multi-channel distribution

CHANNELS

Supermarkets leads distribution thanks to wide assortment of hot drinks
E-commerce benefits from demand for convenience, availability, and value for money

FOODSERVICE VS RETAIL SPLIT

MARKET DATA

Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025
Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025
Table 3 - Retail Sales of Hot Drinks by Category: Volume 2020-2025
Table 4 - Retail Sales of Hot Drinks by Category: Value 2020-2025
Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025
Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025
Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025
Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025
Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025
Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025
Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025
Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025
Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025
Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030
Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030
Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030
Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030
Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030
Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030
Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030
Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Coffee in Bulgaria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Coffee category faces significant challenges

INDUSTRY PERFORMANCE

Volume decline and value growth reflect soaring prices in 2025
Regional novelty attracts interest

WHAT'S NEXT?

High prices will continue to drive current value growth in the coming years
Premiumisation will continue apace, despite price-sensitivity
New taxes could see further price increases for sweetened coffee

COMPETITIVE LANDSCAPE

Strong marketing campaigns crucial amidst fierce competition
Tchibo benefits from diversification strategies in 2025

CHANNELS

Supermarkets leads coffee distribution in Bulgaria in 2025
E-commerce enjoys notable share growth as retailers adopt omnichannel approach

CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2020-2025
Table 27 - Retail Sales of Coffee by Category: Value 2020-2025
Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025
Table 29 - Retail Sales of Coffee by Category: % Value Growth 2020-2025
Table 30 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025
Table 31 - NBO Company Shares of Coffee: % Retail Value 2021-2025
Table 32 - LBN Brand Shares of Coffee: % Retail Value 2022-2025
Table 33 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030
Table 34 - Forecast Retail Sales of Coffee by Category: Value 2025-2030
Table 35 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030
Table 36 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Tea in Bulgaria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Positive performance for tea in 2025, despite competing consumption trends

INDUSTRY PERFORMANCE

Tea enjoys growth across all metrics in 2025
Health and wellness trend boosts consumption of green tea in Bulgaria

WHAT'S NEXT?

Category growth predicted as health and wellness trends gather pace
Functionality set to remain a key driver of innovation
Sustainability will go hand-in-hand with premiumisation

COMPETITIVE LANDSCAPE

Bioprograma strengthens its lead thanks to widespread distribution and strong marketing campaigns
Botanical vies for share by enhancing its portfolio and broadening distribution

CHANNELS

Supermarkets continues to lead distribution in 2025
E-commerce continues its upward trajectory

CATEGORY DATA

Table 37 - Retail Sales of Tea by Category: Volume 2020-2025
Table 38 - Retail Sales of Tea by Category: Value 2020-2025
Table 39 - Retail Sales of Tea by Category: % Volume Growth 2020-2025
Table 40 - Retail Sales of Tea by Category: % Value Growth 2020-2025
Table 41 - NBO Company Shares of Tea: % Retail Value 2021-2025
Table 42 - LBN Brand Shares of Tea: % Retail Value 2022-2025
Table 43 - Forecast Retail Sales of Tea by Category: Volume 2025-2030
Table 44 - Forecast Retail Sales of Tea by Category: Value 2025-2030
Table 45 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030
Table 46 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Other Hot Drinks in Bulgaria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Competing trends lead to varied fortunes for other hot drinks in 2025

INDUSTRY PERFORMANCE

Retail volume sales of hot drinks fall in 2025 as prices soar
Opportunities to position other plant-based hot drinks as healthier options

WHAT'S NEXT?

High cocoa prices are likely to constrain volume growth for other hot drinks in the years ahead
Sugar tax imposition may further hamper sales
Concerns about sugar consumption likely to drive reformulation

COMPETITIVE LANDSCAPE

Nestlé maintains its lead but loses share to more affordable "others"
Tymbark remains a key player in 2025

CHANNELS

Small local grocers leads distribution, but loses some share to supermarkets and discounters in 2025
Bulgaria sees rapid expansion of modern grocery retailing

CATEGORY DATA

Table 47 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025
Table 48 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025
Table 49 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025

Table 50 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025
Table 51 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025
Table 52 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025
Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030
Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030
Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030
Table 56 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

## 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/hot-drinks-in-bulgaria/report.