

Snacks in Bulgaria

September 2022

Table of Contents

Snacks in Bulgaria

EXECUTIVE SUMMARY

Snacks in 2022: The big picture

Key trends in 2022

Competitive landscape

Channel developments

What next for snacks?

Chart 1 - Snacks Value Sales Growth Scenarios: 2020-2027

Chart 2 - Snacks Impact of Drivers on Value Sales: 2020-2027

MARKET DATA

Table 1 - Sales of Snacks by Category: Volume 2017-2022

Table 2 - Sales of Snacks by Category: Value 2017-2022

Table 3 - Sales of Snacks by Category: % Volume Growth 2017-2022

Table 4 - Sales of Snacks by Category: % Value Growth 2017-2022

Table 5 - NBO Company Shares of Snacks: % Value 2018-2022

Table 6 - LBN Brand Shares of Snacks: % Value 2019-2022

Table 7 - Penetration of Private Label by Category: % Value 2017-2022

Table 8 - Distribution of Snacks by Format: % Value 2017-2022

Table 9 - Forecast Sales of Snacks by Category: Volume 2022-2027

Table 10 - Forecast Sales of Snacks by Category: Value 2022-2027

Table 11 - Forecast Sales of Snacks by Category: % Volume Growth 2022-2027

Table 12 - Forecast Sales of Snacks by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Chocolate Confectionery in Bulgaria

KEY DATA FINDINGS

2022 DEVELOPMENTS

Return to pre-pandemic life supports sales while health trends shape demand

Mondelez leads, and players invest in TV and online campaigns

Countlines witnesses constant activity with new launches and smaller formats

PROSPECTS AND OPPORTUNITIES

Expansion of modern grocery retailers to propel growth in chocolate confectionery

Vegan-friendly options will gain ground as players push healthy-positioned products

Resumed social activities to boost sales in boxed assortments

CATEGORY DATA

Table 13 - Sales of Chocolate Confectionery by Category: Volume 2017-2022

Table 14 - Sales of Chocolate Confectionery by Category: Value 2017-2022

Table 15 - Sales of Chocolate Confectionery by Category: % Volume Growth 2017-2022

Table 16 - Sales of Chocolate Confectionery by Category: % Value Growth 2017-2022

Table 17 - Sales of Chocolate Tablets by Type: % Value 2017-2022

Table 18 - NBO Company Shares of Chocolate Confectionery: % Value 2018-2022

Table 19 - LBN Brand Shares of Chocolate Confectionery: % Value 2019-2022

Table 20 - Distribution of Chocolate Confectionery by Format: % Value 2017-2022

Table 21 - Forecast Sales of Chocolate Confectionery by Category: Volume 2022-2027

Table 22 - Forecast Sales of Chocolate Confectionery by Category: Value 2022-2027

Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2022-2027

Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2022-2027

Gum in Bulgaria

KEY DATA FINDINGS

2022 DEVELOPMENTS

Gum reclaims status as ideal breath freshener for office workers

Players promote gum's functionality and delivery of freshness

Mars still rules over gum with dominant share

PROSPECTS AND OPPORTUNITIES

Hybrid home/work situations to undermine sales in gum

Natural sweeteners to replace aspartame

Mars' leadership is unthreatened, but competition will increase as brands innovate

CATEGORY DATA

Table 25 - Sales of Gum by Category: Volume 2017-2022

Table 26 - Sales of Gum by Category: Value 2017-2022

Table 27 - Sales of Gum by Category: % Volume Growth 2017-2022

Table 28 - Sales of Gum by Category: % Value Growth 2017-2022

Table 29 - Sales of Gum by Flavour: Rankings 2017-2022

Table 30 - NBO Company Shares of Gum: % Value 2018-2022

Table 31 - LBN Brand Shares of Gum: % Value 2019-2022

Table 32 - Distribution of Gum by Format: % Value 2017-2022

Table 33 - Forecast Sales of Gum by Category: Volume 2022-2027

Table 34 - Forecast Sales of Gum by Category: Value 2022-2027

Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2022-2027

Table 36 - Forecast Sales of Gum by Category: % Value Growth 2022-2027

Sugar Confectionery in Bulgaria

KEY DATA FINDINGS

2022 DEVELOPMENTS

Medicated confectionery leads volume growth as boiled sweets lags at the back

Medicated confectionery benefits from food-as-medicine trend, and lokum and halva see trend-inspired development

Haribo leads pastilles, gummies, jellies and chews

PROSPECTS AND OPPORTUNITIES

Packaging to provide opportunities for development

Functionality will shape innovation in medicated confectionery

Sugar confectionery likely to benefit from retail chain expansion though competition will increase

CATEGORY DATA

Summary 2 - Other Sugar Confectionery by Product Type: 2022

Table 37 - Sales of Sugar Confectionery by Category: Volume 2017-2022

Table 38 - Sales of Sugar Confectionery by Category: Value 2017-2022

Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2017-2022

Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2017-2022

Table 41 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2017-2022

Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2018-2022

- Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2019-2022
- Table 44 - Distribution of Sugar Confectionery by Format: % Value 2017-2022
- Table 45 - Forecast Sales of Sugar Confectionery by Category: Volume 2022-2027
- Table 46 - Forecast Sales of Sugar Confectionery by Category: Value 2022-2027
- Table 47 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2022-2027
- Table 48 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2022-2027

Ice Cream in Bulgaria

KEY DATA FINDINGS

2022 DEVELOPMENTS

Ice cream sees healthy growth with Froneri and Unilever still dominating
Ice cream bustles with activity thanks to active and innovative brands
Plant-based ice cream rises with new flavours designed to tempt

PROSPECTS AND OPPORTUNITIES

Ice cream continues to benefit from promise of indulgence
Health-focus will inspire new products and newcomers
Retail expansion will support sales in large packs, as e-commerce promotes artisanal ice cream

CATEGORY DATA

- Table 49 - Sales of Ice Cream by Category: Volume 2017-2022
- Table 50 - Sales of Ice Cream by Category: Value 2017-2022
- Table 51 - Sales of Ice Cream by Category: % Volume Growth 2017-2022
- Table 52 - Sales of Ice Cream by Category: % Value Growth 2017-2022
- Table 53 - Sales of Ice Cream by Leading Flavours: Rankings 2017-2022
- Table 54 - Sales of Impulse Ice Cream by Format: % Value 2017-2022
- Table 55 - NBO Company Shares of Ice Cream: % Value 2018-2022
- Table 56 - LBN Brand Shares of Ice Cream: % Value 2019-2022
- Table 57 - NBO Company Shares of Impulse Ice Cream: % Value 2018-2022
- Table 58 - LBN Brand Shares of Impulse Ice Cream: % Value 2019-2022
- Table 59 - NBO Company Shares of Take-home Ice Cream: % Value 2018-2022
- Table 60 - LBN Brand Shares of Take-home Ice Cream: % Value 2019-2022
- Table 61 - Distribution of Ice Cream by Format: % Value 2017-2022
- Table 62 - Forecast Sales of Ice Cream by Category: Volume 2022-2027
- Table 63 - Forecast Sales of Ice Cream by Category: Value 2022-2027
- Table 64 - Forecast Sales of Ice Cream by Category: % Volume Growth 2022-2027
- Table 65 - Forecast Sales of Ice Cream by Category: % Value Growth 2022-2027

Savoury Snacks in Bulgaria

KEY DATA FINDINGS

2022 DEVELOPMENTS

Tortilla chips leads growth while popcorn leads decline
Nuts appeal through high levels of protein, and Rois introduces adventurous mixes
Naturally healthy puffed snacks and captures more consumers as rice snacks soars ahead of all

PROSPECTS AND OPPORTUNITIES

Production technology to be impacted by health trends
Popcorn and pretzels to fall due to unhealthy perception, maturity and lack of innovation
Rice snacks to flourish in line with rising demand, and puffed snacks to attract new competitors

CATEGORY DATA

Table 66 - Sales of Savoury Snacks by Category: Volume 2017-2022
Table 67 - Sales of Savoury Snacks by Category: Value 2017-2022
Table 68 - Sales of Savoury Snacks by Category: % Volume Growth 2017-2022
Table 69 - Sales of Savoury Snacks by Category: % Value Growth 2017-2022
Table 70 - NBO Company Shares of Savoury Snacks: % Value 2018-2022
Table 71 - LBN Brand Shares of Savoury Snacks: % Value 2019-2022
Table 72 - Distribution of Savoury Snacks by Format: % Value 2017-2022
Table 73 - Forecast Sales of Savoury Snacks by Category: Volume 2022-2027
Table 74 - Forecast Sales of Savoury Snacks by Category: Value 2022-2027
Table 75 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2022-2027
Table 76 - Forecast Sales of Savoury Snacks by Category: % Value Growth 2022-2027

Sweet Biscuits, Snack Bars and Fruit Snacks in Bulgaria

KEY DATA FINDINGS

2022 DEVELOPMENTS

Health trends push sales in plain biscuits
Protein/energy bars steals consumers from fruit and nut bars
Organic variants gain ground and appeal through health and indulgence

PROSPECTS AND OPPORTUNITIES

Protein/energy bars will form focus of development and innovation
Bulk dried fruit competes with packaged varieties
Healthier versions of firm favourites will aim to retain consumer loyalty

CATEGORY DATA

Table 77 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2017-2022
Table 78 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2017-2022
Table 79 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2017-2022
Table 80 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2017-2022
Table 81 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2018-2022
Table 82 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2019-2022
Table 83 - NBO Company Shares of Sweet Biscuits: % Value 2018-2022
Table 84 - LBN Brand Shares of Sweet Biscuits: % Value 2019-2022
Table 85 - NBO Company Shares of Snack Bars: % Value 2018-2022
Table 86 - LBN Brand Shares of Snack Bars: % Value 2019-2022
Table 87 - NBO Company Shares of Fruit Snacks: % Value 2018-2022
Table 88 - LBN Brand Shares of Fruit Snacks: % Value 2019-2022
Table 89 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2017-2022
Table 90 - Distribution of Sweet Biscuits by Format: % Value 2017-2022
Table 91 - Distribution of Snack Bars by Format: % Value 2017-2022
Table 92 - Distribution of Fruit Snacks by Format: % Value 2017-2022
Table 93 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2022-2027
Table 94 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2022-2027
Table 95 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2022-2027
Table 96 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2022-2027

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/snacks-in-bulgaria/report.