

## **Soft Drinks in Bulgaria**

Market Direction | 2022-12-19 | 84 pages | Euromonitor

### **AVAILABLE LICENSES:**

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

### **Report description:**

Sales of soft drinks witnessed dynamic growth in 2022 in current value terms, although this was largely the result of the high rate of inflation. Following Russia's invasion of Ukraine in February 2022 there was an immediate impact on European and global economies, with the cost of production rising sharply across most industries, including soft drinks. Despite these price rises, moderate retail volume growth was also seen across most soft drinks categories, except for carbonates and concentrate...

Euromonitor International's Soft Drinks in Bulgaria report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2017-2021), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they legislative, distribution, packaging or pricing issues. Forecasts to 2026 illustrate how the market is set to change.

Product coverage: Asian Speciality Drinks, Bottled Water, Carbonates, Concentrates, Energy Drinks, Juice, RTD Coffee, RTD Tea, Sports Drinks.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- \* Get a detailed picture of the Soft Drinks market;
- \* Pinpoint growth sectors and identify factors driving change;
- \* Understand the competitive environment, the market's major players and leading brands;
- \* Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Table of Contents:

Soft Drinks in Bulgaria  
Euromonitor International  
December 2022

### List Of Contents And Tables

#### SOFT DRINKS IN BULGARIA

##### EXECUTIVE SUMMARY

Soft drinks in 2022: The big picture

2022 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 2017-2022

Table 2 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2017-2022

Table 3 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2017-2022

Table 4 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2017-2022

Table 5 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2021

Table 6 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2021

Table 7 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2021

Table 8 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2021

Table 9 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2017-2022

Table 10 □Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2017-2022

Table 11 □Off-trade Sales of Soft Drinks by Category: Value 2017-2022

Table 12 □Off-trade Sales of Soft Drinks by Category: % Value Growth 2017-2022

Table 13 □Sales of Soft Drinks by Total Fountain On-trade: Volume 2017-2022

Table 14 □Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2017-2022

Table 15 □NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2018-2022

Table 16 □LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2022

Table 17 □NBO Company Shares of Off-trade Soft Drinks: % Value 2018-2022

Table 18 □LBN Brand Shares of Off-trade Soft Drinks: % Value 2019-2022

Table 19 □Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2017-2022

Table 20 □Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2017-2022

Table 21 □Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2017-2022

Table 22 □Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2022

Table 23 □Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2022-2027

Table 24 □Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2022-2027

Table 25 □Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2022-2027

Table 26 □Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2022-2027

Table 27 □Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2022-2027

Table 28 □Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2022-2027

Table 29 □Forecast Off-trade Sales of Soft Drinks by Category: Value 2022-2027

Table 30 □Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2022-2027

Table 31 □Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2022-2027

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Table 32 □Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2022-2027

### APPENDIX

#### Fountain sales in Bulgaria

#### DISCLAIMER

#### SOURCES

#### Summary 1 Research Sources

#### CARBONATES IN BULGARIA

#### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Unhealthy perceptions of regular carbonates impacts demand in 2022

Reduced sugar carbonates outperforms regular carbonates with Coca-Cola investing in new product launches

Growing inflation helps carbonates achieve positive value growth, while gin and tonic trend continues to flourish

#### PROSPECTS AND OPPORTUNITIES

Carbonates set to continue declining as health concerns grow

Reduced sugar carbonates likely to outperform regular carbonates.

Reduced sugar options likely to see the most dynamic growth due to health and wellness trend and strong investments in new product development

#### CATEGORY DATA

Table 33 Off-trade vs On-trade Sales of Carbonates: Volume 2017-2022

Table 34 Off-trade vs On-trade Sales of Carbonates: Value 2017-2022

Table 35 Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2017-2022

Table 36 Off-trade vs On-trade Sales of Carbonates: % Value Growth 2017-2022

Table 37 Off-trade Sales of Carbonates by Category: Volume 2017-2022

Table 38 Off-trade Sales of Carbonates by Category: Value 2017-2022

Table 39 Off-trade Sales of Carbonates by Category: % Volume Growth 2017-2022

Table 40 Off-trade Sales of Carbonates by Category: % Value Growth 2017-2022

Table 41 Total Sales of Carbonates by Fountain On-trade: Volume 2017-2022

Table 42 □Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2017-2022

Table 43 □NBO Company Shares of Off-trade Carbonates: % Volume 2018-2022

Table 44 □LBN Brand Shares of Off-trade Carbonates: % Volume 2019-2022

Table 45 □NBO Company Shares of Off-trade Carbonates: % Value 2018-2022

Table 46 □LBN Brand Shares of Off-trade Carbonates: % Value 2019-2022

Table 47 □Forecast Off-trade Sales of Carbonates by Category: Volume 2022-2027

Table 48 □Forecast Off-trade Sales of Carbonates by Category: Value 2022-2027

Table 49 □Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2022-2027

Table 50 □Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2022-2027

Table 51 □Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2022-2027

Table 52 □Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2022-2027

#### JUICE IN BULGARIA

#### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Juice continues to enjoy stable growth in retail volume terms in 2022 despite a price hike

Coconut and other plant waters sees dynamic growth, but juice drinks comes out on top

Not from concentrate 100% juice benefits from healthy image, with Cappy benefiting from new product launches

#### PROSPECTS AND OPPORTUNITIES

Health and wellness trend likely to positively impact demand for juice

Competition from bottled water and RTD tea could limit the growth potential of juice

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Premium products set for healthy growth but high prices will likely be an obstacle to wider acceptance

#### CATEGORY DATA

Table 53 Off-trade Sales of Juice by Category: Volume 2017-2022

Table 54 Off-trade Sales of Juice by Category: Value 2017-2022

Table 55 Off-trade Sales of Juice by Category: % Volume Growth 2017-2022

Table 56 Off-trade Sales of Juice by Category: % Value Growth 2017-2022

Table 57 NBO Company Shares of Off-trade Juice: % Volume 2018-2022

Table 58 LBN Brand Shares of Off-trade Juice: % Volume 2019-2022

Table 59 NBO Company Shares of Off-trade Juice: % Value 2018-2022

Table 60 LBN Brand Shares of Off-trade Juice: % Value 2019-2022

Table 61 Forecast Off-trade Sales of Juice by Category: Volume 2022-2027

Table 62 □Forecast Off-trade Sales of Juice by Category: Value 2022-2027

Table 63 □Forecast Off-trade Sales of Juice by Category: % Volume Growth 2022-2027

Table 64 □Forecast Off-trade Sales of Juice by Category: % Value Growth 2022-2027

#### BOTTLED WATER IN BULGARIA

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Health and wellness trend helps bottled water achieve strong growth in 2022

Increased product variety and local budget brands contribute to the strong growth of bottled water

Environmental concerns drive innovation in bottled water

##### PROSPECTS AND OPPORTUNITIES

Significant growth potential remains, but adding value could be key

Carbonated natural mineral bottled water set for strong growth

E-commerce to boost sales of bottled water and make shopping more convenient

#### CATEGORY DATA

Table 65 Off-trade Sales of Bottled Water by Category: Volume 2017-2022

Table 66 Off-trade Sales of Bottled Water by Category: Value 2017-2022

Table 67 Off-trade Sales of Bottled Water by Category: % Volume Growth 2017-2022

Table 68 Off-trade Sales of Bottled Water by Category: % Value Growth 2017-2022

Table 69 NBO Company Shares of Off-trade Bottled Water: % Volume 2018-2022

Table 70 LBN Brand Shares of Off-trade Bottled Water: % Volume 2019-2022

Table 71 NBO Company Shares of Off-trade Bottled Water: % Value 2018-2022

Table 72 LBN Brand Shares of Off-trade Bottled Water: % Value 2019-2022

Table 73 Forecast Off-trade Sales of Bottled Water by Category: Volume 2022-2027

Table 74 □Forecast Off-trade Sales of Bottled Water by Category: Value 2022-2027

Table 75 □Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2022-2027

Table 76 □Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2022-2027

#### SPORTS DRINKS IN BULGARIA

##### KEY DATA FINDINGS

##### 2022 DEVELOPMENTS

Relaxation of anti-COVID-19 measures leads to strong rebound in demand for sports drinks in 2022

Availability of sports drinks brands continues to improve

High unit prices limit demand for sports drinks

##### PROSPECTS AND OPPORTUNITIES

Sports drinks set for growing demand as consumers lead increasingly active lives

Inflation and economic pressures likely to hamper the category's growth potential

Availability and diversity of sports drinks likely to improve

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## CATEGORY DATA

Table 77 Off-trade Sales of Sports Drinks: Volume 2017-2022

Table 78 Off-trade Sales of Sports Drinks: Value 2017-2022

Table 79 Off-trade Sales of Sports Drinks: % Volume Growth 2017-2022

Table 80 Off-trade Sales of Sports Drinks: % Value Growth 2017-2022

Table 81 NBO Company Shares of Off-trade Sports Drinks: % Volume 2018-2022

Table 82 LBN Brand Shares of Off-trade Sports Drinks: % Volume 2019-2022

Table 83 NBO Company Shares of Off-trade Sports Drinks: % Value 2018-2022

Table 84 LBN Brand Shares of Off-trade Sports Drinks: % Value 2019-2022

Table 85 Forecast Off-trade Sales of Sports Drinks: Volume 2022-2027

Table 86 □Forecast Off-trade Sales of Sports Drinks: Value 2022-2027

Table 87 □Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2022-2027

Table 88 □Forecast Off-trade Sales of Sports Drinks: % Value Growth 2022-2027

## ENERGY DRINKS IN BULGARIA

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Above-the-line marketing and new product development helps energy drinks to maintain strong visibility and growth

Hell continues to rule over energy drinks in 2022

Reduced sugar energy drinks the most dynamic category as consumers turn to healthier options

### PROSPECTS AND OPPORTUNITIES

Energy drinks set to continue on an upward trajectory thanks to their trendy image

Reduced sugar energy drinks set to benefit from healthier image

E-commerce to boost growth prospects of energy drinks and further diversify the category

## CATEGORY DATA

Table 89 Off-trade Sales of Energy Drinks: Volume 2017-2022

Table 90 Off-trade Sales of Energy Drinks: Value 2017-2022

Table 91 Off-trade Sales of Energy Drinks: % Volume Growth 2017-2022

Table 92 Off-trade Sales of Energy Drinks: % Value Growth 2017-2022

Table 93 NBO Company Shares of Off-trade Energy Drinks: % Volume 2018-2022

Table 94 LBN Brand Shares of Off-trade Energy Drinks: % Volume 2019-2022

Table 95 NBO Company Shares of Off-trade Energy Drinks: % Value 2018-2022

Table 96 LBN Brand Shares of Off-trade Energy Drinks: % Value 2019-2022

Table 97 Forecast Off-trade Sales of Energy Drinks: Volume 2022-2027

Table 98 □Forecast Off-trade Sales of Energy Drinks: Value 2022-2027

Table 99 □Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2022-2027

Table 100 □Forecast Off-trade Sales of Energy Drinks: % Value Growth 2022-2027

## CONCENTRATES IN BULGARIA

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Unhealthy perceptions of concentrates continues to impact demand

Liquid concentrates outperforms powder concentrates thanks to innovation and premiumisation

Powder concentrates faced with the problem of category maturity and limited brand competition

### PROSPECTS AND OPPORTUNITIES

Concentrates likely to see a further decline but low prices and customer loyalty could limit the impact

Organic and premium options likely to favour liquid concentrates over powder products

Competitive landscape likely to remain unchanged due to lack of growth potential

## CATEGORY DATA

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

## Concentrates Conversions

### Summary 2 Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 101 Off-trade Sales of Concentrates (RTD) by Category: Volume 2017-2022

Table 102 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2017-2022

Table 103 Off-trade Sales of Concentrates by Category: Value 2017-2022

Table 104 Off-trade Sales of Concentrates by Category: % Value Growth 2017-2022

Table 105 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2019-2022

Table 106 NBO Company Shares of Off-trade Concentrates: % Value 2018-2022

Table 107 LBN Brand Shares of Off-trade Concentrates: % Value 2019-2022

Table 108 NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2018-2022

Table 109 LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2022

Table 110 □NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2018-2022

Table 111 □LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2022

Table 112 □Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2022-2027

Table 113 □Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2022-2027

Table 114 □Forecast Off-trade Sales of Concentrates by Category: Value 2022-2027

Table 115 □Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2022-2027

## RTD TEA IN BULGARIA

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Some health-conscious consumers switch from carbonates and juice to RTD tea

RTD tea benefits from healthier image and refreshing taste

New product development and new flavours provide a boost to sales in 2022

### PROSPECTS AND OPPORTUNITIES

RTD tea set to continue building on its healthy image

Innovation and new product development to continue over the forecast period

As consumers return to more active lives this should shake up the distribution landscape

### CATEGORY DATA

Table 116 Off-trade Sales of RTD Tea by Category: Volume 2017-2022

Table 117 Off-trade Sales of RTD Tea by Category: Value 2017-2022

Table 118 Off-trade Sales of RTD Tea by Category: % Volume Growth 2017-2022

Table 119 Off-trade Sales of RTD Tea by Category: % Value Growth 2017-2022

Table 120 Leading Flavours for Off-trade RTD Tea: % Volume 2017-2022

Table 121 NBO Company Shares of Off-trade RTD Tea: % Volume 2018-2022

Table 122 LBN Brand Shares of Off-trade RTD Tea: % Volume 2019-2022

Table 123 NBO Company Shares of Off-trade RTD Tea: % Value 2018-2022

Table 124 LBN Brand Shares of Off-trade RTD Tea: % Value 2019-2022

Table 125 □Forecast Off-trade Sales of RTD Tea by Category: Volume 2022-2027

Table 126 □Forecast Off-trade Sales of RTD Tea by Category: Value 2022-2027

Table 127 □Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2022-2027

Table 128 □Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2022-2027

## RTD COFFEE IN BULGARIA

### KEY DATA FINDINGS

#### 2022 DEVELOPMENTS

Sales of RTD coffee bounce back as consumers return to their busier lifestyles in the wake of COVID-19

Competition intensifying in RTD coffee as new and existing players invest in the category

E-commerce increases its share of sales in RTD coffee in 2022

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## PROSPECTS AND OPPORTUNITIES

RTD coffee has strong growth potential but high prices remain a major obstacle

Increased competition could help to increase the accessibility of RTD coffee

Convenience is king when it comes to the distribution of RTD coffee

## CATEGORY DATA

Table 129 Off-trade Sales of RTD Coffee: Volume 2017-2022

Table 130 Off-trade Sales of RTD Coffee: Value 2017-2022

Table 131 Off-trade Sales of RTD Coffee: % Volume Growth 2017-2022

Table 132 Off-trade Sales of RTD Coffee: % Value Growth 2017-2022

Table 133 NBO Company Shares of Off-trade RTD Coffee: % Volume 2018-2022

Table 134 LBN Brand Shares of Off-trade RTD Coffee: % Volume 2019-2022

Table 135 NBO Company Shares of Off-trade RTD Coffee: % Value 2018-2022

Table 136 LBN Brand Shares of Off-trade RTD Coffee: % Value 2019-2022

Table 137 Forecast Off-trade Sales of RTD Coffee: Volume 2022-2027

Table 138 □Forecast Off-trade Sales of RTD Coffee: Value 2022-2027

Table 139 □Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2022-2027

Table 140 □Forecast Off-trade Sales of RTD Coffee: % Value Growth 2022-2027

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Soft Drinks in Bulgaria

Market Direction | 2022-12-19 | 84 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

### ORDER FORM:

Select license	License	Price
	Single User Licence	€1750.00
	Multiple User License (1 Site)	€3500.00
	Multiple User License (Global)	€5250.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-11"/>
		Signature	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com