



Euromonitor  
International

# Soft Drinks in Bulgaria

November 2025

Table of Contents

## EXECUTIVE SUMMARY

Hot weather, cost pressures and regulation reshape soft drinks demand

## KEY DATA FINDINGS

## INDUSTRY PERFORMANCE

Hot summer supports volume sales in soft drinks

Energy drinks drives overall growth despite consumer cost consciousness

Functional trend accelerates

## WHAT'S NEXT?

Sugar tax may curb volume growth for some soft drinks

Warm weather and tourism will ensure future growth

Demand for better quality to push premiumisation

## COMPETITIVE LANDSCAPE

Coca-Cola maintains lead of overall soft drinks in 2025

Amata rises fastest among companies

## CHANNELS

Small local grocers leads distribution, while discounters posts fastest growth

Foodservice suffers as government ends post-pandemic support

## MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

## APPENDIX

Fountain sales in Bulgaria

## COUNTRY REPORTS DISCLAIMER

## SOURCES

Summary 1 - Research Sources

[Bottled Water in Bulgaria](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Weather extremes sustain bottled water growth

### INDUSTRY PERFORMANCE

Bottled water benefits from hot summer

Functional variants drive overall growth, as carbonated spring water attracts interest

### WHAT'S NEXT?

Health trends support further expansion for bottled water in Bulgarian

Innovation to centre on premiumisation and functionality

Tighter regulation may impact development

### COMPETITIVE LANDSCAPE

Devin leads through robust distribution network

Amata benefits from big pack sizes

### CHANNELS

Small local grocers remains largest channels but continues to lose share in 2025

Consumers continue to shift online for bulk buys

### CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 38 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### Carbonates in Bulgaria

#### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Health priorities and regulation weigh on carbonates

#### INDUSTRY PERFORMANCE

Carbonates struggles as health awareness rises

Reduced carbonates outpaces overall category

#### WHAT'S NEXT?

Further falls forecast for carbonates

Health and sustainability concerns to inform innovation

Anticipated sugar tax could reshape demand

#### COMPETITIVE LANDSCAPE

Coca-Cola remains number one company in carbonates

Best Fruit rises through Florina

#### CHANNELS

Small local grocers leads though channel is gradually weakening

E-commerce and discounters attract value-seeking consumers

#### CATEGORY DATA

Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 53 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 54 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### Concentrates in Bulgaria

#### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Soft drinks competition erodes concentrates demand

## INDUSTRY PERFORMANCE

Concentrates continues to suffer in 2025

Liquid variants fare better than powder

## WHAT'S NEXT?

Premiumisation to support value sales while volume will remain in decline

Powder concentrates set to drive value growth

Anticipated sugar tax could further undermine development potential

## COMPETITIVE LANDSCAPE

Vitanea leads overall concentrates in 2025

Lidl sees fastest growth

## CHANNELS

Small local grocers maintains leadership but loses share

Discounters benefits from favourable pricing

Concentrates Conversions

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

## CATEGORY DATA

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 71 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

[Juice in Bulgaria](#)

## KEY DATA FINDINGS

## 2025 DEVELOPMENTS

Health positioning and premiumisation support juice growth

## INDUSTRY PERFORMANCE

Juice sees solid volume growth in 2025

Consumers show greater interest in exotic flavours

## WHAT'S NEXT?

Rising sales forecast for juice in Bulgaria

Functional and natural trends set to gather pace

Players prepare for possible sugar tax

## COMPETITIVE LANDSCAPE

Coca-Cola remains ahead of the rest

Smart Organic enjoys expansion

## CHANNELS

Small local grocers maintain relevance in rural Bulgaria

Discounters sees fastest growth, driven by Lidl

## CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2020-2025

Table 85 - Off-trade Sales of Juice by Category: Value 2020-2025

Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025

Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025

Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025

Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025

Table 90 - NBO Company Shares of Off-trade Juice: % Value 2021-2025

Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025

Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030

Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030

Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030

Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### [RTD Coffee in Bulgaria](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Convenient caffeine formats lift RTD coffee sales

## INDUSTRY PERFORMANCE

Hectic lifestyles and convenience demand ensure continued volume growth

Innovation and visibility support sales

## WHAT'S NEXT?

Evolving demand ensures further growth for RTD coffee

Foodservice development and energy drinks represent challenges to RTD coffee

Progress to be shaped by environmental and health concerns

## COMPETITIVE LANDSCAPE

Rauch leads through Cafe Mio

Hell Energy makes gains in RTD coffee in 2025

## CHANNELS

Supermarkets and forecourts hold greatest distribution share

Discounters continues to expand through Lidl

## CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2020-2025

Table 97 - Off-trade Sales of RTD Coffee: Value 2020-2025

Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### RTD Tea in Bulgaria

#### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Health-oriented RTD tea gains ground in retail

#### INDUSTRY PERFORMANCE

Retail benefits from health trends and warm weather in 2025

Still RTD drives growth

#### WHAT'S NEXT?

Further growth forecast amid rising cross-category competition

Bulgarians will continue to shift towards healthy and top-quality products

Possible sugar tax could hamper volume growth

#### COMPETITIVE LANDSCAPE

Coca-Cola leads through Fuze Tea

Aspasia 92 records robust rises

#### CHANNELS

Supermarkets channel leads distribution

Lidl pushes growth in discounters

#### CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2020-2025

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### Energy Drinks in Bulgaria

#### KEY DATA FINDINGS

## 2025 DEVELOPMENTS

Energy drinks records strong gains as health focus supports sugar-free variants

## INDUSTRY PERFORMANCE

Retail sales benefit from warm weather and tourism in 2025

Consumers increasingly opt for reduced-sugar energy drinks

## WHAT'S NEXT?

Energy drinks faces bright future in Bulgaria

Digitalisation to remain key for category expansion

Health positioning and functionality as central to innovation

## COMPETITIVE LANDSCAPE

Hell continues to lead, with Red Bull and Monster close behind

Lidl pursues aggressive expansion strategy

## CHANNELS

Consumers favour local neighbourhood stores

Discounters continues to rise thanks to Lidl

## CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 122 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

[Sports Drinks in Bulgaria](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Fitness lifestyles lift sports drinks demand

### INDUSTRY PERFORMANCE

Sports drinks rises as Bulgarians become more active

Reduced-sugar segment struggles to keep up

### WHAT'S NEXT?

Strong growth forecast for sports drinks in Bulgaria

Functional trend set to accelerate within sports drinks

Players to invest more in digital presence

### COMPETITIVE LANDSCAPE

Nutrim maintains leadership in 2025

Tymbark sees growth driven by Dr Witt Isotonic

## CHANNELS

Supermarkets as preferred channel for sports drinks purchases

Discounters rises fastest among retail channels in 2025

## CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 134 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 144 - Forecast Off-trade Sales of Sports Drinks: % 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/soft-drinks-in-bulgaria/report](http://www.euromonitor.com/soft-drinks-in-bulgaria/report).