



Concentrates in Bulgaria

November 2025

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Concentrates in Bulgaria - Category analysis

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

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Small local grocers maintains leadership but loses share

Discounters benefits from favourable pricing

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Soft Drinks in Bulgaria - Industry Overview

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Hot weather, cost pressures and regulation reshape soft drinks demand

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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

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