



**Euromonitor
International**

Energy Drinks in Bulgaria

November 2025

Table of Contents

Energy Drinks in Bulgaria - Category analysis

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 1 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 2 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 3 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 4 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 6 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 7 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 8 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 9 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 10 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 11 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 12 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Soft Drinks in Bulgaria - Industry Overview

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

Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 27 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 28 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 29 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 30 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 31 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 32 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 33 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 34 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 35 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 36 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 37 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 39 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 43 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 45 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 47 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Bulgaria

COUNTRY REPORTS DISCLAIMER

SOURCES

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/energy-drinks-in-bulgaria/report.