

# Other Hot Drinks in Bulgaria

December 2025

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## Other Hot Drinks in Bulgaria - Category analysis

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#### 2025 DEVELOPMENTS

Competing trends lead to varied fortunes for other hot drinks in 2025

#### INDUSTRY PERFORMANCE

Retail volume sales of hot drinks fall in 2025 as prices soar

Opportunities to position other plant-based hot drinks as healthier options

#### WHAT'S NEXT?

High cocoa prices are likely to constrain volume growth for other hot drinks in the years ahead

Sugar tax imposition may further hamper sales

Concerns about sugar consumption likely to drive reformulation

#### COMPETITIVE LANDSCAPE

Nestlé maintains its lead but loses share to more affordable “others”

Tymbark remains a key player in 2025

#### CHANNELS

Small local grocers leads distribution, but loses some share to supermarkets and discounters in 2025

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#### INDUSTRY PERFORMANCE

High inflation dampens purchasing power, leading local consumers to seek discounts and promotions

Demand for novel flavours and varieties increases

Functionality and wellness trends continue to shape innovation

#### WHAT'S NEXT?

Prices expected to continue rising, driving promotions and discounting

Premiumisation trend will continue, despite general price-sensitivity

Wellness trend and increased awareness will intensify demand for low-sugar formulations

## COMPETITIVE LANDSCAPE

Nestlé maintains its lead, despite fierce competition

Tchibo gains ground by focusing on multi-channel distribution

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Supermarkets leads distribution thanks to wide assortment of hot drinks

E-commerce benefits from demand for convenience, availability, and value for money

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