



Cooking Ingredients and Meals in Bulgaria

November 2025

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Cooking Ingredients and Meals in Bulgaria

EXECUTIVE SUMMARY

Bulgaria's cooking ingredients and meals market grows through rising wages and convenience trends

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Rising wages and VAT hikes drive the home cooking trend and supports sales

Ongoing price sensitivity boosts demand for private label products

Health-conscious choices and demand for convenience drives sales in 2025

WHAT'S NEXT?

Sales are expected to grow while Eurozone entry spurs price control concerns

Convenience is set to fuel growth, especially in ready meals and frozen pizza

There is set to be a growing preference for private labels and retail e-commerce in Bulgaria

COMPETITIVE LANDSCAPE

Biser Oliva AD retains its leads while Lidl's private label goods gain ground

Kotányi and Iglotex lead growth in herbs and spices, and frozen pizza

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Supermarkets and hypermarkets strengthen their lead in the 2025 distribution landscape

Retail e-commerce and discounters lead distribution channel growth

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Bulgaria's edible oil market sees value sales rise driven by sunflower oil demand and olive oil recovery

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Value sales of edible oils rise in 2025, led by the strong performance of sunflower oil

Volume sales of olive oil recover following two years of declines in Bulgaria

Bulgarian sunflower oil thrives on domestic stability and premium product growth

WHAT'S NEXT?

Sunflower oil will remain a key driver of growth as rapeseed oil will gain ground

Health trends and innovation are set to support ongoing growth in olive and specialty oils

Local and international retail chains are expected to expand into smaller cities

COMPETITIVE LANDSCAPE

Biser Oliva AD leads edible oils, driven by its strong sunflower oil brands

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Hypermarkets and supermarkets lead distribution due to variety and pricing

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2025 DEVELOPMENTS

Consumers turn to quick-to-prepare meals and soups

INDUSTRY PERFORMANCE

Rising incomes and convenience boost sales of meals and soups in 2025

Chilled ready meals and prepared salads lead growth due to rising demand for convenience

Health concerns challenge sales of shelf-stable meals and soups despite price-driven value growth

WHAT'S NEXT?

Convenience is expected to fuel growth in meals, while shelf-stable soups decline

Health trends are set to drive innovations that are free from artificial preservatives and colourants

Online delivery and culinary stands are set to intensify competition across the forecast period

COMPETITIVE LANDSCAPE

Nestlé Bulgaria AD maintains its lead, however, competitors gain ground

Iglotex SA and Lidl record dynamic performances to drive growth in frozen pizzas

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Price-driven growth for sauces, dips and condiments while volume sales remain flat

Traditional and global flavours drive sales of dips in Bulgaria during 2025

Pasta sauces benefit from both convenience and product development

WHAT'S NEXT?

Higher restaurant prices are expected to support sales of sauces, dips and condiments

Innovation is expected to focus on clean ingredients and exotic flavours

Tomato pastes, purées and dips will drive growth as demand rises for health and convenience

COMPETITIVE LANDSCAPE

Konsul OOD increases its lead in sauces, dips, and condiments during 2025

Kotányi GmbH drives growth by expanding its distribution during 2025

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Sweet spreads benefit from both health trends and indulgence in 2025

Demand for healthier products drive growth in honey and nut and seed based spreads

Chocolate spreads maintain strong growth in 2025 despite health concerns

WHAT'S NEXT?

Health and indulgence trends are expected to drive ongoing growth in sweet spreads

Organic and sugar-free sweet spreads are set to gain ground in Bulgaria

Stricter labelling and ingredient rules aim to boost quality in honey and jam

COMPETITIVE LANDSCAPE

Ferrero SpA leads sweet spreads in 2025 while private label gains momentum

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