



# Processed Meat, Seafood and Alternatives To Meat in Bulgaria

November 2025

## Processed Meat, Seafood and Alternatives To Meat in Bulgaria - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Rising costs, fresh meat trends and plant-based innovation reshape category dynamics

#### INDUSTRY PERFORMANCE

Rising retail prices sustain value growth in processed meat, seafood and alternatives

Meat and seafood substitutes continues to post dynamic growth

#### WHAT'S NEXT?

Rising costs and demand for fresh meat to shape future performance, with Bella likely to maintain overall leadership

Health and sustainability trends drive reformulation and innovation

Retail modernisation and e-commerce expansion to support accessibility

#### COMPETITIVE LANDSCAPE

Bella Bulgaria maintains strong category leadership

Premium substitutes players gain traction in niche segments

#### CHANNELS

Supermarkets leads distribution in 2025

Retail e-commerce and discounters show fastest growth

#### CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 3 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 4 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 5 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 6 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

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Table 10 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 11 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 12 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 13 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 14 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

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## Staple Foods in Bulgaria - Industry Overview

### EXECUTIVE SUMMARY

Rising prices, private label strength and evolving consumer habits

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Retail prices continue to drive value growth in staple foods

Rising cost of living fuels price sensitivity and private label demand

Health, quality and convenience trends continue to shape industry dynamics

#### WHAT'S NEXT?

Retail price regulation and euro adoption to influence future growth  
Plant-based expansion and convenience will sustain growth momentum  
Private label expansion and e-commerce optimisation set to continue

## COMPETITIVE LANDSCAPE

Bella Bulgaria maintains leadership through strong multi-category presence  
Smaller players target niche growth segments

## CHANNELS

Small local grocers retains leadership amid format diversification  
E-commerce and discounters remain fastest-growing channels

## MARKET DATA

Table 15 - Sales of Staple Foods by Category: Volume 2020-2025  
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Table 17 - Sales of Staple Foods by Category: % Volume Growth 2020-2025  
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Table 26 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

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## SOURCES

Summary 1 - Research Sources

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