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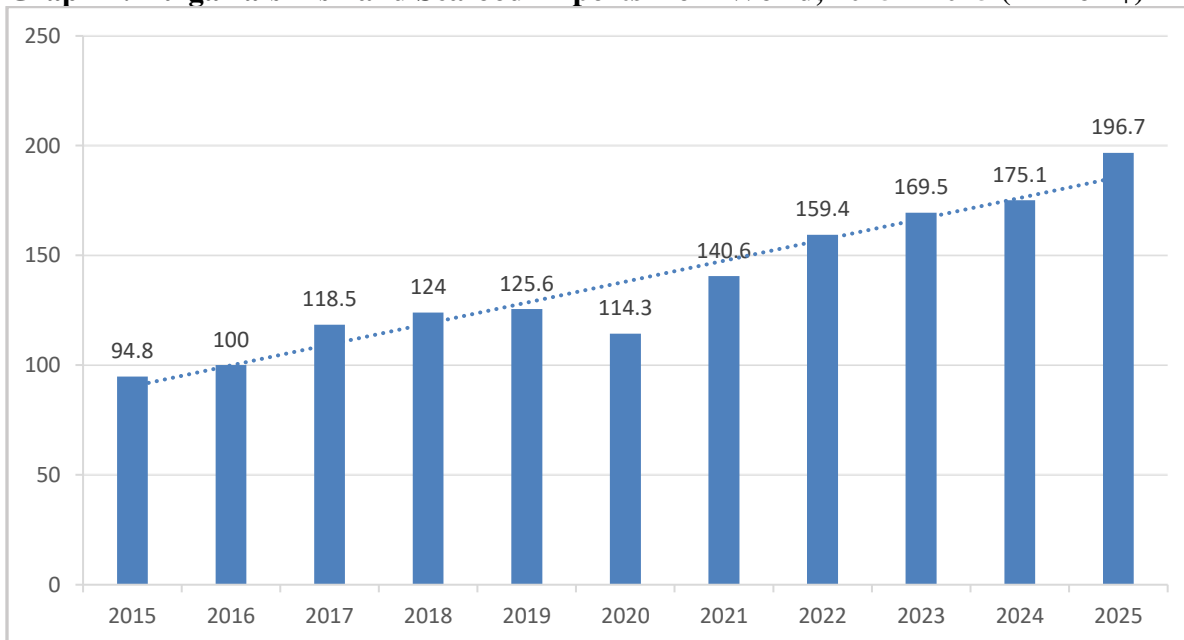
Report Highlights:

Bulgaria's fish and seafood imports continued to grow in 2025, reaching a record \$196.7 million, up 12.3 percent from 2024. Over the past decade, imports have nearly doubled, driven by rising demand, a broader product mix, and limited domestic catch for several popular species. Imports remained concentrated among European Union (EU) suppliers, although Bulgaria also sourced notable volumes from Norway, the Faroe Islands, Türkiye, and People's Republic of China (PRC). The foodservice and modern retail sectors supported demand for both traditional and higher-value imported species. Despite this growth, household fish consumption remains well below the EU average, leaving room for further market development and opportunities for U.S. exporters.

Imports of Fish and Seafood Products

According to Trade Data Monitor (TDM), which reflects reported Eurostat data, Bulgaria’s imports of fish and seafood products grew steadily over the past 10 years, with the only exception being the COVID-19-impacted year of 2020. Over the last decade, imports have doubled, reaching \$196.7 million in 2025 compared to \$94.8 million in 2015. This upward trend indicates continued expansion of Bulgaria’s fish and seafood market, supported by growing demand and a broader mix of imported species.

Graph 1: Bulgaria’s Fish and Seafood Imports from World, 2015 – 2025 (Million \$)



Source: Trade Data Monitor

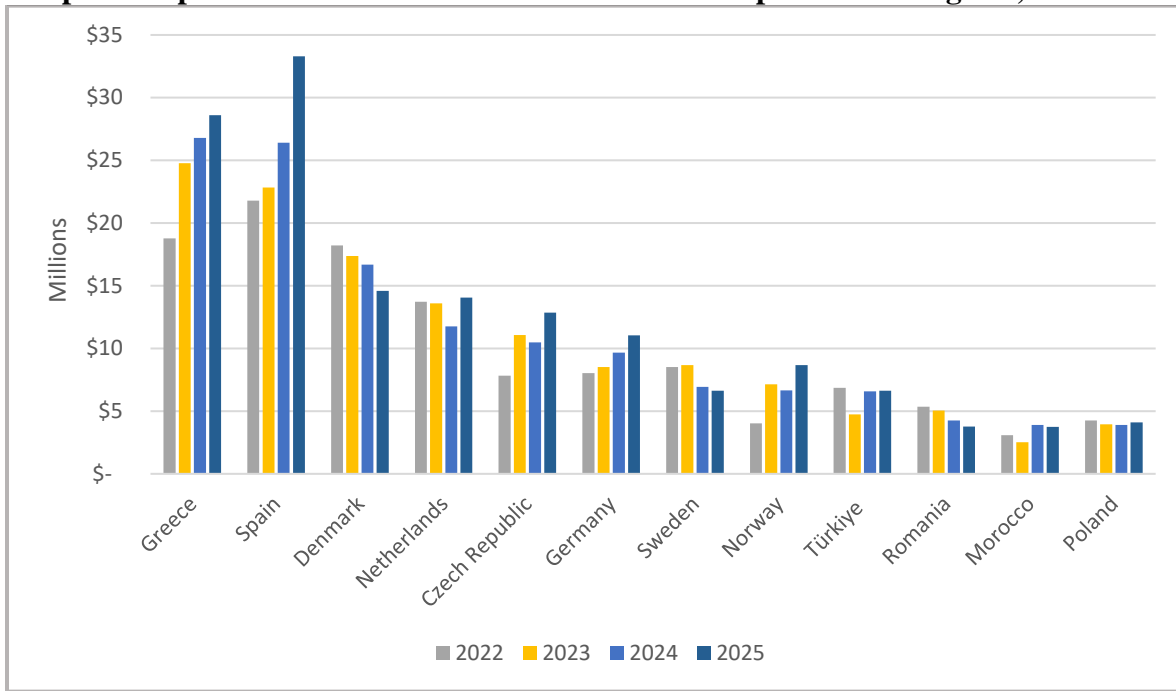
Total imports of fish and fishery products in Bulgaria in 2025 reached a record \$196.7 million, a 12.3 percent increase over 2024 due to insufficient domestic catch/production and growing market demand for imported species such as mackerel, Pacific salmon, tuna, shrimp and prawns, seabass, seabream, Atlantic salmon, hake, herring, and other products. Imports of frozen squid and sepias also increased.

More than 76 percent of Bulgaria’s 2025 fish and seafood imports, valued at \$149.1 million, originated in other EU member states. In 2025, imports mainly came from Spain (\$33.3 million), Greece (\$26.6 million), Denmark (\$14.6 million), Netherlands (\$14 million), Czech Republic (\$12.9 million), Germany (\$11 million), Sweden (\$6.6 million), Romania (\$3.8 million), and Poland (\$4 million). Main non-EU trading partners were Norway (\$8.7 million), Faroe Islands (\$7.8 million), Türkiye (\$6.6 million), Morocco (\$3.8 million), Canada (\$1.9 million), Vietnam (\$3.6 million), PRC (\$5.9 million), Argentina (\$1.9 million), Indonesia (\$1.4 million), and New Zealand (\$1.3 million). See graph 2 below.

Although Norway, Iceland, and Liechtenstein are not EU member states, they are members of the [European Economic Area](#) (EEA) giving them access to the EU single market. The EEA Agreement provides for the inclusion of EU legislation covering the four freedoms, namely the free movement of goods, services, persons, and capital, throughout the 30 EEA States.

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Graph 2: Top 12 EU and Non-EU Fish and Seafood Exporters to Bulgaria, 2022-2025 (Million \$)



Source: Trade Data Monitor

In 2025, imports by species were dominated by frozen mackerel (\$25.4 million) and shrimp and prawns (\$16.9 million). As mackerel is not available in domestic catch, frozen mackerel imports meet demand for final consumers and the processing industry.

Other large 2025 import categories included seabass, tuna, Pacific salmon, Atlantic salmon, seabream, frozen squid/cuttlefish, and other products (See Table 1 below).

According to Intrastat data from the Bulgarian National Statistical Institute (NSI), Bulgarian imports of fish and seafood from the United States declined by 15 percent in 2025. This follows the rapid increase of 172 percent seen in 2024. U.S. imports mainly consist of frozen Alaska pollock, lobsters, frozen salmon, mollusks, scallops, and crustaceans.

Table 1: Top 10 Fish and Seafood Product Imports by Species, 2024 – 2025 (Million \$)

Species/HS Code	2024	2025	Change
			2025/2024
Mackerel/030354	18.6	25.4	36.2%
Shrimp and prawns (cold water and frozen)/030616; 030617	16.9	16.9	0%
Seabass/030284	10	13.4	33.9%
Tunas/160414	9.6	11.8	22.3%
Pacific salmon/030441	11.7	10.1	-14.3%
Atlantic salmon/030214	6.8	9.2	35.3%
Seabream/030285	7	8.1	15.8%
Frozen lulas and sepias/030743	6.8	7.8	15%

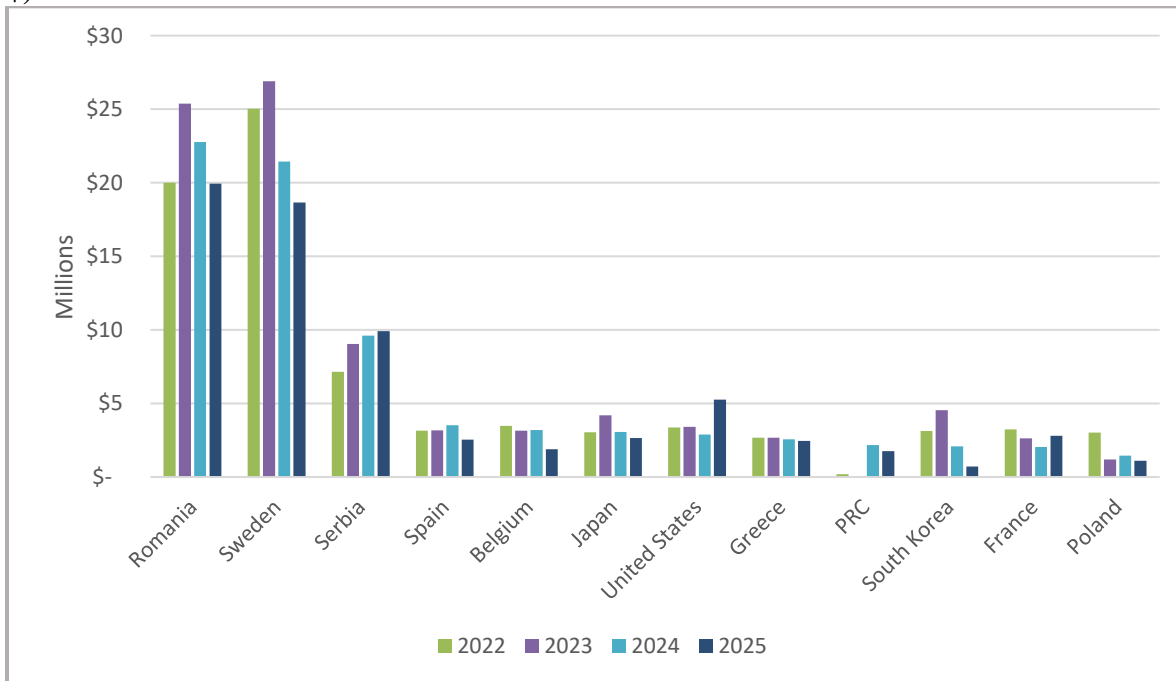
Frozen fish nesoi (not elsewhere specified or included)/030389	7.8	6.8	-12.1%
Hake fillets, frozen/030366	3.4	4.5	33.7%

Source: Trade Data Monitor

Exports of Fish and Seafood Products

Total 2025 Bulgarian exports of fish and seafood products reached \$79.9 million, a decrease of 8.2 percent from 2024. Within the EU, exports also declined by 13.8 percent to \$53.1 million, 66 percent of total exports in 2025. Primary EU markets were Romania (\$19.9 million), Sweden (\$18.7 million), Spain (\$2.5 million), Belgium (\$1.9 million), and Greece (\$2.5 million). 2025 exports to non-EU markets increased by 5.6 percent to \$26.8 million and were mainly to Serbia (\$9.9 million), United States (\$5.3 million), Japan (\$2.7 million), and PRC (\$1.8 million).

Graph 3: Top 12 EU and Non-EU Fish and Seafood Importers from Bulgaria, 2022-2025 (Million \$)



Source: Trade Data Monitor

In 2025, the most notable increases in exports were fresh and chilled trout (110.3 percent), salmon (48.6 percent), caviar (25.1 percent), and tuna (18.7 percent). Exports of several other fishery products declined in 2025, most notably other frozen mollusks (-44.4 percent), prepared mollusks (-13.8 percent), and shrimp and prawns (-10.8 percent). The decline likely reflected reduced availability following a sharp drop in aquaculture mussel production, while softer demand in some foreign markets may also have contributed (See Table 2).

Table 2: Top 10 Fish and Seafood Product Exports by Species, 2024 – 2025 (Million \$)

Species/HS Code	2024	2025	Change
			2025/2024
Shrimp and prawns, prepared or preserved/160529; 160521	19.4	17.3	-10.8%
Trout, fresh or chilled/030211	2.9	6.04	110.3%
Caviar/160431	4.6	5.8	25.1%
Mackerel, prepared or preserved/160415	5.13	5.097	-0.64%
Tunas/160414	3	3.6	18.7%
Fish, prepared or preserved, nesoi/160420	3.16	3.14	-0.57%
Mollusks, prepared or preserved, nesoi/160559	2.9	2.5	-13.8%
Other mollusks, frozen/030792	4.7	2.6	-44.4%
Pacific salmon, Atlantic salmon, and Danube salmon fillets/030441	1.8	2.6	48.6%
Anchovies, prepared or preserved/160416	2.03	2.43	19.9%

Source: Trade Data Monitor

Foodservice Industry

Bulgaria’s Hotel, Restaurant, and Institutional (HRI) foodservice industry is a significant driver of fish consumption. The industry continued to grow in 2025, supported by easing inflation, higher wages, and stronger consumer confidence. Bulgaria’s full accession to the Schengen Area supported tourism and trade in 2025, while preparations for euro adoption improved the outlook and business confidence ahead of the January 1, 2026 changeover. Despite ongoing economic challenges, including elevated energy and labor costs, as well as regional geopolitical instability, the sector remained resilient and adaptive. Tourism activity remained strong in 2025, with media reporting continued growth in visitor arrivals and overnight stays, which supported demand in Bulgaria’s hotel and restaurant sector. Bulgaria’s stable tax system, strategic location, and improving infrastructure continue to create opportunities for U.S. exporters, with future growth driven by innovation, modernization, and evolving consumer preferences for value and healthier choices.

Bulgaria’s HRI has faced a number of challenges in the past 3 years, including the post-pandemic recovery, the Russian-Ukraine War, inflationary pressures, supply chain disturbances, the volatile political situation, and the relatively low (but growing) consumer purchasing power. FAS Sofia expects the industry to sustain a moderate-paced upward trend. For more information about the Bulgarian HRI industry, please see FAS Sofia’s latest [HRI report](#).

The HRI and food retail sectors will continue to influence and educate consumers on fish varieties, positive characteristics, and health benefits. For traditional species in Bulgaria, prices depend on the catch size and domestic aquaculture production, while prices for imported species are mainly determined by international market prices.

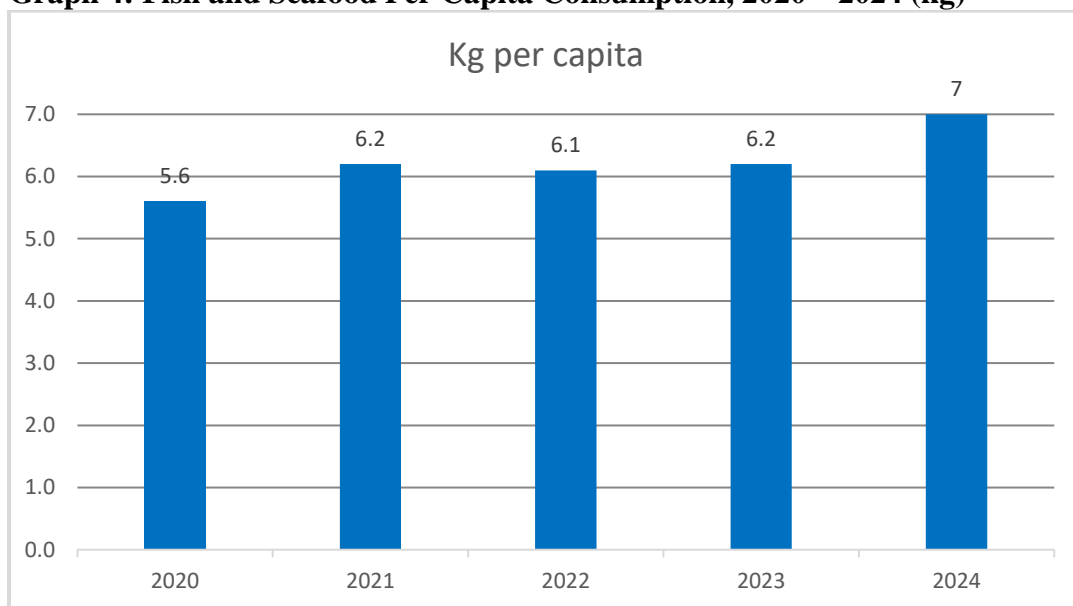
Consumption

According to NSI, Bulgaria’s per capita household fish consumption in 2024 was slightly above 2023 at 7 kilograms (kg), significantly lower than the average EU consumption of about 23.5 kg per capita. However, this figure does not include restaurant consumption. With restaurant consumption included, cumulative per capita consumption is estimated to be almost double (but still remains at only half of EU

levels). Consumption levels have grown slightly over the last 3 years and should remain stable with slight growth. This is attributed to rising consumer incomes and the growing demand for healthier food, despite increasing wholesale and retail prices for fish and fishery products.

Bulgarian consumers currently tend to prefer species like European sprat, carp, rainbow trout, Prussian carp, silver carp, and zander, although there is also increasing demand for mid- and high-end products like mackerel, salmon, tuna, seabream, seabass, cod, trout, hake, lobster, squid, shrimp and prawns, sardines, and herring. Opportunities also exist to supply the Bulgarian fish and seafood-processing sector, which adds value and sells products throughout the EU.

Graph 4: Fish and Seafood Per Capita Consumption, 2020 – 2024 (kg)



Source: Bulgarian NSI. Note: Does not include restaurant consumption

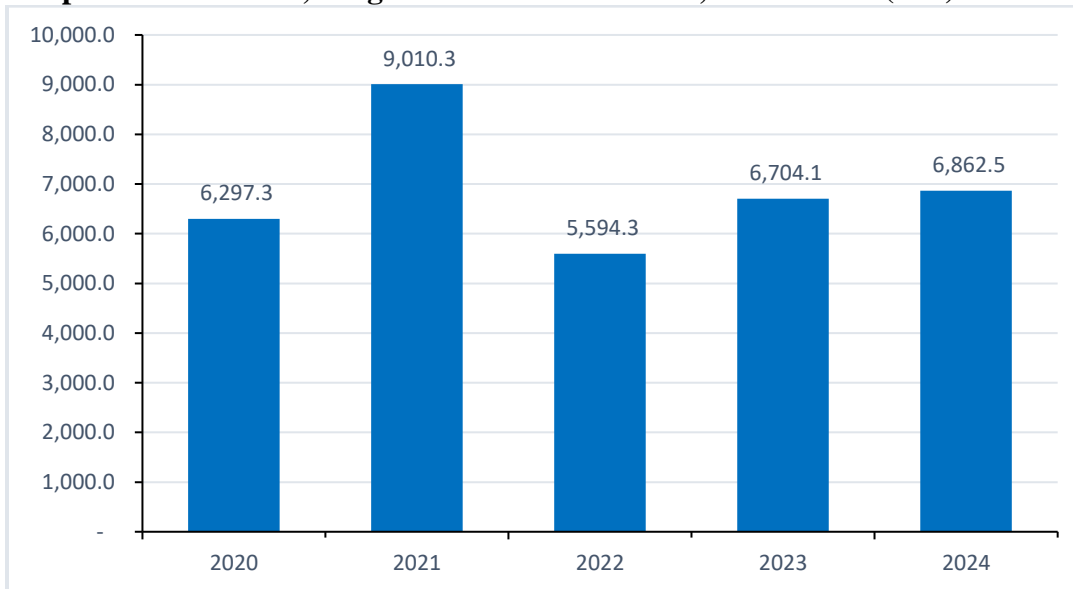
Domestic Production

Remark: Data for the year 2025 was not yet available when this report was written. Therefore, analysis and conclusions presented herein are based on the most recent data for 2024.

In 2024, the domestic catch of fish and other aquatic organisms grew by 2.4 percent compared to 2023. The main reason was a slight increase in the catch of fish and other aquatic organisms in the Black Sea and a double catch in the Danube River. The lower catch in recent years has been one of the reasons for stronger import demand.

According to official statistics, the total 2024 domestic catch increased to 6,863 metric tons (MT) from 6,704 MT in 2023. 6,784 MT was harvested from the Black Sea and 79 MT from the Danube River.

Graph 5: Total Catch, Bulgarian Fish and Seafood, 2020 – 2024 (MT)



Source: Bulgarian Executive Agency for Fisheries and Aquaculture

Table 3. Bulgarian Fish and Seafood Production 2024 (MT)

Description	Quantity
Fish fillets and other fish meat (whether or not minced), fresh or chilled	3,708
Fish, frozen	6,855
Fish fillets, frozen	1,302
Fish, dried, whether or not salted, or in brine	628
Fish, otherwise prepared or preserved, except prepared fish dishes	8,159
Caviar and caviar substitutes	221
Mollusks, frozen, dried, salted or in brine	1,199
Other aquatic invertebrates and seaweed, frozen, dried, salted or in brine	500
Crustaceans, mollusks and other aquatic invertebrates and seaweed, otherwise prepared or preserved	1,457
Other inedible products of fish, crustaceans, mollusks or other aquatic invertebrates or seaweed	296

Source: Bulgarian National Statistical Institute

Black Sea Fisheries

Bulgaria’s fishing industry is fragmented along the country’s 240 miles of coastline, with a small fishing fleet consisting of less than [1,800](#) vessels. In 2024, the Black Sea catch increased by 1.8 percent over 2023. About 42 percent of all catch was European sprat, followed by Black Sea mullet (5.5 percent), whitefish (3.5 percent), Black Sea horse mackerel/scad (3.5 percent), and anchovy (3.5 percent). Rapana traditionally accounts for the highest percentage of the Black Sea shellfish catch with 34 percent of all Black Sea catch. In 2024, the rapana catch was 2,297 MT, a 0.3 percent increase from 2023. The catch of Black Sea mussels decreased by 26 percent compared to 2023, while the white sand mussel, which has seen significant interest in recent years, recorded a growth of 42 percent.

Table 4. Black Sea Catch by Species 2023 and 2024

Species	MT		Change 2024/2023
	2023	2024	
European Sprat	3,264.3	2,837	-13.1%
Shellfish (Rapana, Mussel, Clam, Shrimp)	2,577.5	2,614	1.4%
Black Sea Mullet	241.2	373.8	55.0%
Bluefish	36	238.5	562.5%
Black Sea Horse Mackerel/scad	373	237.5	-36.3%
Anchovy	6.5	235.7	3526.2%
Turbot	84.4	91.2	8.1%
Atlantic bonito	1.3	44	3284.6%
Thornback Ray	22.7	39.4	73.6%
Black Sea whiting	22.1	26.6	20.4%
Other species	38.12	46	20.7%
Total Black Sea Catch	6,667.12	6,784	1.8%

Source: Bulgarian Executive Agency for Fisheries and Aquaculture

Freshwater Fisheries

Bulgaria has over 200,000 hectares (HA) of lakes, reservoirs, and rivers, which account for about 2 percent of its total territory. The longest rivers are the Danube (470 kilometers [km]), followed by the Iskar (368 km), Maritsa (321 km), and Kamchia (245 km). Over 400 lakes cover more than 10,000 HA in total area. Bulgaria's 2012 Law on Fisheries and Aquaculture banned commercial fishing within inland water basins.

The commercial catch from the Danube River in 2024 doubled from 2023 to 79 MT. The Danube catch in 2024 consisted mainly of silver carp (21 percent), white barbel (17 percent), carp (13 percent), common bream (7.3 percent), and others.

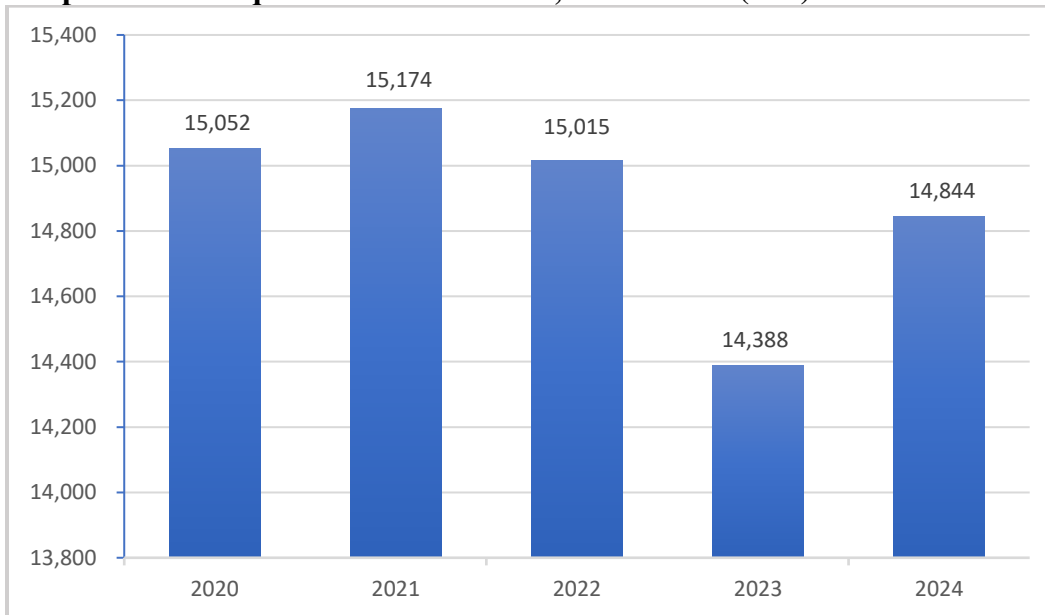
The Ministry of Environment and Water and the Ministry of Agriculture and Food introduced an indefinite ban on fishing for sturgeon species in the Bulgarian section of the Danube River and the Black Sea, effective January 1, 2026. The ban aims to protect and preserve the sturgeon population as they are among the most endangered fish species due to loss of natural habitats, disruption of breeding migration corridors, water pollution, illegal fishing, and caviar trade.

Aquaculture

Total 2024 aquaculture production (breeding material, fish, and seafood) increased by 3.2 percent from the previous year to 14,844 MT. Total 2024 production of breeding material increased by 13 percent to 1,592 MT due to an increase in production of some of the main fish species grown in fish farms.

In 2024, total aquaculture fish production reached 13,252 MT, up 2.4 percent from 2023, led by rainbow trout, carp, and bighead carp. Black mussel capture decreased significantly by 34 percent to 1,698 MT.

Graph 6: Total Aquaculture Production, 2020 – 2024 (MT)



Source: *Bulgarian Executive Agency for Fisheries and Aquaculture*

According to the Ministry of Agriculture and Food and the [Bulgarian Executive Agency for Fisheries and Aquaculture](#), as of the end of 2024 there are 690 active aquaculture farms in Bulgaria, of which 668 for fresh water and 22 for marine aquaculture. The number of aquaculture businesses is likely to remain stable in the future, as new and modern production facilities are established under the EU Fishery Program, as well as the expansion and modernization of existing businesses.

Labeling

EU legislation mandates all products, including seafood, offered for retail sale in the EU be properly labeled. The EU’s Publications Office issued a guide to the new fish and aquaculture consumer labels. This guide explains the mandatory information that must appear on the labels and what additional information can be displayed. The pocket guide can be accessed through this [link](#).

Import Tariffs

All EU Member States apply the same tariff schedule to goods imported from outside the EU. Applicable import duties are determined by the product’s classification under the EU Combined Nomenclature and by the customs value. The eight-digit coding system is based on the Harmonized System, which is also the basis for the import and export codes used by the United States. The most up-to-date tariff information is available through the European Commission’s EU Customs Tariff ([TARIC](#)) database and the [Access2Markets portal](#).

More detailed information about food and feed legislation currently in force for the EU can be found in the latest [Food and Agricultural Import Regulations and Standards](#) report.

Opportunities for U.S. Suppliers

The Bulgarian fish and seafood market offers opportunities for U.S. suppliers, driven by a steady increase in imports and a growing demand for diverse, high-quality products. Bulgarian importers are

actively seeking to expand the variety of fish available to consumers, particularly in the mid- and high-value categories. The foodservice sector, which is a key driver of this demand, continues to grow, further boosting the market for imported seafood. Bulgarian imports of fish and seafood from the United States, after a rapid increase of 172 percent in 2024, declined by nearly 15 percent and mainly consisted of frozen Alaska pollock, lobsters, frozen salmon, mollusks, scallops, and crustaceans. Total U.S. exports to Bulgaria remained below \$1 million.

U.S. suppliers face challenges such as import duties and competition from countries benefiting from tariff-free trade with the EU. Despite these obstacles, rising consumer incomes and demand for healthier food options create a favorable environment for U.S. suppliers to introduce premium seafood products. Additionally, opportunities exist in supplying raw materials to Bulgaria's fish and seafood-processing sector, which adds value and sells products throughout the EU.

In summary, while U.S. suppliers must navigate pricing and duty challenges, the expanding Bulgarian market, driven by the foodservice sector and a growing demand for diverse seafood products, presents opportunities for growth and market penetration.

Bulgarian Fish and Seafood Importers

Contact [FAS Sofia](#) for an updated list of fish and seafood importers and/or Bulgarian institutions.

FAS Sofia's Contact Information:

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Attachments:

No Attachments.