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Foreign Agricultural Service

GAIN Global Agricultural Information Network

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Report Name: Food Processing Ingredients Bulgaria

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Report Highlights:

Bulgaria's food processing sector is expanding, driven by rising consumer demand, steady modernization, and increased investment in production technologies. This improving market environment creates strong opportunities for U.S. suppliers offering high-quality, reliable, and innovative ingredients that Bulgarian processors increasingly seek. While recent inflation and regional supply chain issues slowed some activity, processors continue to expand product lines, upgrade equipment, and look for new sources of premium inputs. Bulgaria's 2025 entry into the Schengen Area and 2026 adoption of the euro will further streamline trade, reduce transaction costs, and improve market predictability for foreign partners. These trends position U.S. exporters to supply ingredients such as tree nuts, sauces, specialty beverages, dairy components, legumes, and frozen products that support Bulgaria's evolving food manufacturing base.

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Market Fact Sheet: Bulgaria

Executive Summary
Bulgaria's gross domestic product (GDP) grew by 3.4 percent in 2024 compared to 2023. This was stronger than the 2.9 percent year on year growth, Bulgaria has seen since 2019. Exports (freight on board [FOB]) account for 43 percent of Bulgaria's GDP and are a pillar of the economy. European Union (EU) Member States are Bulgaria's primary trading partners. In 2024, Bulgaria ran a €6.6 ($7.8) billion trade deficit in goods (Exports FOB – Imports [costs, insurance, and freight]). In 2024, agriculture accounted for 2.4 percent of Bulgaria's GDP, down 0.5 percent from 2023.

Imports of Consumer-Oriented Products
U.S. goods exported to Bulgaria must meet EU sanitary and phytosanitary requirements. For specific information, see FAS Sofia's Food and Agricultural Import Regulations and Standards report. In 2024, consumer-oriented food imports were $4.7 billion, a 9.6 percent increase compared to 2023. U.S. exports of consumer-oriented products to Bulgaria grew by 26 percent.

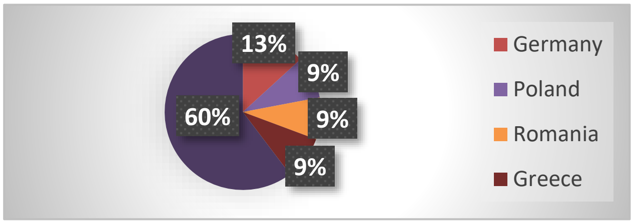

Chart 1: Top Exporting Countries to Bulgaria

Food Processing Industry
Bulgarian food processing enjoys steady development. Leading food processing sectors include dairy, bakery, sugar, chocolate and confectionery, sunflower oil, red and poultry meat, eggs, soft drinks, horticultural processing, and wine production. U.S. products and/or associated ingredients with good sales potential in Bulgaria include tree nuts, distilled spirits, food preparations, peanuts, dried fruits, snack/cereal foods, pulses, beef, wine, soft drinks/juices, and seafood products.

Food Retail Industry
Bulgarian grocery retail sales reached Bulgarian Lev (BGN) 15.2 billion ($8.1 billion) in 2024. Modern retail sales accounted for BGN 10.2 billion ($5.4 billion) or 67 percent and BGN 5.0 billion ($2.7 billion) were in traditional channels. Total grocery outlets were 36,047. The largest retailer, Lidl, accounted for nearly 20 percent of grocery retail sales. Grocery e-commerce expanded significantly due to COVID-19, and this trend has continued since then, with potential for future growth. Urban consumers increasingly demand higher quality products and those perceived as healthy.

SWOT Analysis

Strengths	***Weaknesses***
Bulgaria is accessible by sea and has an efficient distribution network. A growing food processing industry is looking for new imported ingredients. Marketing costs are low.	Some U.S. exports are disadvantaged because of EU non-tariff barriers and import duties.
Opportunities	***Threats***
U.S. high-value products could enjoy increasing demand due to growing incomes, a fast-developing food retail network, and consumption habits switching to high-quality products.	Domestic producers receive EU funds to upgrade production efficiency and product quality, which can lower demand for imports.

Quick Facts CY 2024

Imports of Consumer-Oriented Products
($4.7 billion)

Top 10 Growth Products Imported in Bulgaria

1) Sunflower Seeds	2) Oils
3) Food Preparations	4) Bread, Pastry, Cakes
5) Water	6) Meat of Swine
7) Cane or Beet Sugar	8) Cocoa Preparations
9) Coffee	10) Whiskeys

Food Industry by Channels ($ billion) 2024

Food Exports – Agricultural and Related Products	8.1
Food Imports – Agricultural and Related Products	7.74
Retail Food Industry	8.1
Food Service - HRI	3.76

Top 10 F&B Retailers in Bulgaria

1) Lidl	2) Kaufland
3) Billa	4) Metro
5) Fantastico	6) T-Market
7) CBA	8) Lagardere
9) Avanti	10) CBS

GDP/Population
Population *(millions)*: 6.44
GDP *($ billion)*: 109
GDP per capita *($)*: 16,921
Bulgarian National Bank Exchange Rate: $1=BGN 1.88
Sources: Euromonitor, Eurostat, Bulgarian National Bank, Bulgarian National Statistical Institute, Local sources.
Contact: AgSofia@usda.gov

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SECTION I. MARKET OVERVIEW

Bulgaria's economy continues to expand steadily within a stable EU framework, offering a strategic entry point to the wider EU market through its favorable location, Black Sea and Danube access, and improving infrastructure. EU membership has reshaped Bulgaria's trade dynamics, aligning the country's food and agricultural regulations with EU standards and shifting trade flows toward intra-EU partners. While pre-EU opportunities until 2007 for U.S. exporters in bulk commodities such as poultry have declined, demand for U.S. consumer-oriented and high-value food ingredients is expected to grow in line with rising incomes, expanding food processing capacity, and increasing foreign direct investment.

Looking ahead, Bulgaria's full integration into the Schengen Area in 2025 and its adoption of the euro on January 1, 2026, are set to reinforce economic confidence, stimulate investment, and enhance trade efficiency. Schengen membership facilitates tourism and business travel which, in turn, supports the hospitality and foodservice sectors. Eurozone accession will simplify transactions, reduce exchange rate risk, increase transparency, improving financial stability and business planning. These developments, coupled with stronger investor trust and easier access to financing, are expected to drive modernization and innovation in the food processing industry, supporting sustained growth and broader opportunities for U.S. ingredient suppliers.

The Food Processing Industry in Bulgaria

In 2024, food and beverage processing accounted for approximately 15 percent of Bulgaria's total industrial output, underscoring the sector's importance to the national economy. The industry produces a broad range of goods, including dairy and confectionery products, meat and meat preparations, bakery items, processed fruits and vegetables, fish, and beverages. Around 6,000 companies operate in the sector, nearly half of which are concentrated in the south-central and southwestern regions. Major players include Oliva, ADM (Amylum Bulgaria), Coca-Cola Hellenic Bottling Company, Bella Bulgaria, Alcao, Boni Holding, Ameta Holding, Nestlé Bulgaria, Mondelez Bulgaria, Milky Group Bio, Papas, and Carlsberg Bulgaria. The sector continues to expand production capacity and improve product quality through investment in automation, digitalization, and sustainable practices, reflecting a broader shift toward innovation and efficiency.

Bulgaria's main agricultural trading partners include other EU markets, primarily Romania, Germany, Greece, Poland, and the Netherlands, as well as neighboring countries such as Türkiye and Serbia, and key suppliers including Ukraine, Moldova, and the People's Republic of China (PRC). More than 81 percent of Bulgaria's consumer-oriented imports originate from other EU member states, which remain the strongest competitors for U.S. agricultural exports. Nevertheless, Bulgaria's dynamic food processing industry, driven by modernization and foreign investment, continues to open new opportunities for sourcing a wide range of high-quality ingredients, including from the United States.

Key Market Drivers and Consumption Trends

Important sectors within Bulgaria's food industry include production and processing of dairy products, chocolate and confectionery, corn-based products, bakery, meat, edible oils, poultry and eggs, non-alcoholic beverages, flour, horticultural processing, beer, spirits, and wine production. In 2024, the food processing industry was shaped by several key market drivers, including rising consumer demand for

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higher-quality and convenient products, increased foreign direct investment, modernization of production facilities, and the growing influence of EU food safety and quality standards. Consumption trends indicate a steady shift toward healthier and value-added products, as well as greater demand from both domestic and tourist-driven foodservice channels.

Organic products have gained prominence among Bulgarian consumers, driven by a stronger focus on healthier lifestyles and the perception that organic goods are superior in quality compared to conventional alternatives. The booming summer tourist season and the fully operational foodservice industry also supported growth. For more information about the Bulgarian organic products market, please refer to USDA Foreign Agricultural Service (FAS) Sofia's Organic Market report.

Table 1. Advantages and Challenges for U.S. Food Processing Ingredients

Advantages	Challenges
The increase in consumption of food and edible fishery products is creating demand for more imports.	Strong competition with EU exporters who can provide commodities in smaller volumes, thus reducing pressure of high stocks on the buyers' cash flow.
The Bulgarian retail market is expanding, offering more consumers access to modern retail options.	The lower purchasing power of the average Bulgarian and the size of the local market limit U.S. exports of higher-value products.
Bulgaria's Schengen membership and euro adoption ease trade and boost tourism, giving U.S. agricultural exporters better access to its growing foodservice market. The growing food-processing industry is looking for new imported food ingredients.	EU regulation and tariffs give preferential access to products from EU countries. U.S. exporters face competition from tariff-free products from other EU countries and countries with EU free trade agreements (FTAs).
The range of U.S. food ingredients and products, effectively capable of satisfying demand across different consumer income levels. Brand recognition, chiefly with consumer-ready products, is a particular strength in the Bulgarian market.	Non-tariff barriers such as food safety regulations, phytosanitary restrictions, traceability and labeling requirements, as well as logistical constraints can complicate exporting to Bulgaria.
The U.S. reputation as a reliable supplier of food inputs in terms of availability, delivery and quality. Marketing costs to increase consumer awareness are relatively low.	Preference of U.S. companies to work with big EU distributors responsible for certain European regions and exclusion of local importers who would like to engage in direct import from the United States.
Bulgarian consumer confidence in U.S. products due to the very well-established U.S. food safety regulatory system.	Differences between U.S. and EU production systems for beef, pork and poultry keep some products out of the EU market. Some products of modern biotechnology are prohibited.

SECTION II. ROADMAP FOR MARKET ENTRY

Entry Strategy

U.S. companies seeking to export to Bulgaria are advised to research the market. FAS offers U.S. suppliers a number of valuable services to support them with market entry. Please visit USDA's Global Agricultural Information Network (GAIN) to view relevant FAS Attaché Reports. Also contact the FAS office in Sofia with any specific questions. U.S. companies should also consider attending one of Europe's many USDA endorsed trade shows. Other regional trade shows, including Inter Food and Drink (IFD), Bulgaria's largest annual food and beverage trade show, are also options. Trade shows can serve as a springboard in the market and help companies to establish new trade contacts and gauge product interests.

U.S. exporters can also get market information from their respective U.S. State Regional Trade Groups (SRTG), commodity Cooperator Groups, and State Departments of Agriculture. For more information, contact the SRTG responsible for your state here.

Import Procedure and FAS Attaché Reports

FAS Attaché reports published by FAS Sofia for new-to-market exporters to Bulgaria are:

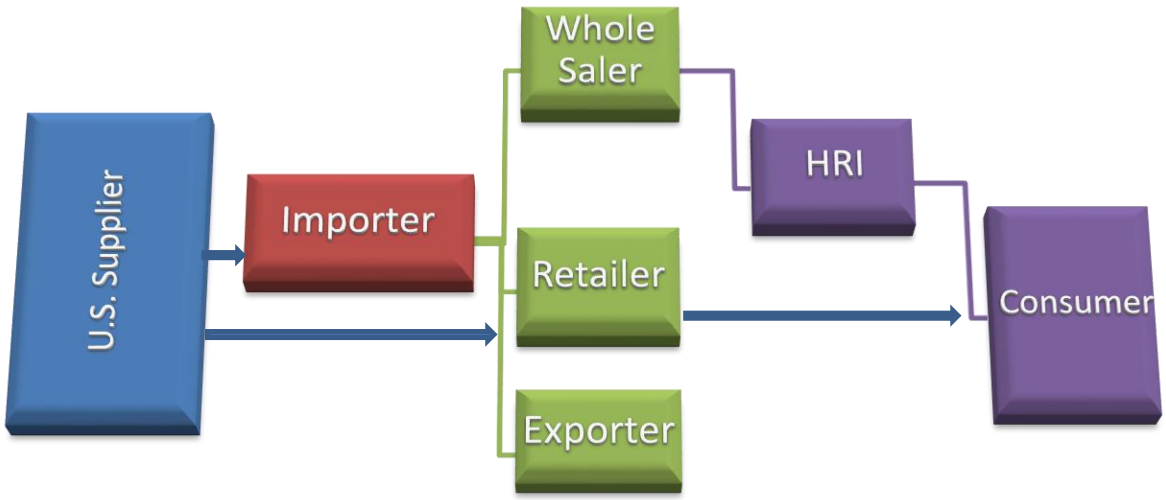
- The Exporter Guide, which contains a general overview of the macro-economic situation, discusses demographic trends, food trends, offers exporter business tips and shares overviews of the food retail and HRI sectors.
- The Import Regulations and Standards (FAIRS) reports provide an overview of import regulation standards and required health and origin certificates (FAIRS Export Certificate Report).
- The Retail Market Report gives an overview of the Bulgarian food retail market.
- The Hospitality Restaurant Institutional Foodservice (HRI) in Bulgaria report provides an overview of market opportunities and key channels of distribution for U.S. food and beverage products destined for the foodservice market in Bulgaria.
- The Organic Market Update gives an overview of the organic food market in Bulgaria.
- The Fish and Seafood Market Brief contains information about Bulgaria's fish and seafood market. It provides an overview of market opportunities and key data and statistics about production, imports, exports, and main EU regulations.
- For information on the Bulgarian market, trade shows, and other marketing opportunities in Bulgaria, contact the FAS office in Sofia. See additional contact information at the end of this report.

Market Structure and Distribution Channels

The Bulgarian food ingredients market has various supply channels, depending on the product. Most small and medium-sized processors use local products, while larger ones buy from both local producers and foreign suppliers. Retailers usually purchase directly from the processor or the buying organization. Many of them also work directly with foreign suppliers. The HRI sector may purchase directly from a wholesaler whereas smaller outlets generally purchase products from cash and carry operations.

U.S. exporters of food ingredients usually enter the Bulgarian market through local specialized ingredients importers. These importers typically also promote the products to the end users. U.S. products that already entered the Bulgarian market have established reputations as high quality, but since some of them are positioned in the high-end segment, competition from local and products from other EU countries on the price driven Bulgarian market is very strong.

Chart 1: Supply Chain Chart



Consumer foodservice sales increased by almost four percent in 2024 and number of foodservice outlets grew to 39,781. Food processors adapt to new trends and offer foodservice operators new products that meet consumer preferences. Most operators are adapting to the health and wellness trend and fast-changing consumer tastes by searching for innovations. Competition in foodservice is intensifying, with local and imported products competing for market share. Competition is likely to focus on the quality of products and services (regular daily supplies, variety in pack sizes, price promotions, and the renewal of portfolios). Foreign companies tend to concentrate on higher value-added products, such as dairy-based ice cream desserts, soup, ready meals, and sauces, while domestic companies tend to compete effectively in dairy, bakery, processed meat, and oils and fats.

Share of Major Segments in the Food Processing Industry

Since official data for 2024 is incomplete or unavailable, the chart (Chart 2) below presents FAS Sofia's estimates based on publicly available information from the Bulgarian National Statistical Institute (NSI), the Ministry of Agriculture and Food, industry associations, and reputable media sources.

Chart 2. Structure of Bulgaria's Food Processing Industry by Major Segments, 2024 (FAS estimate)

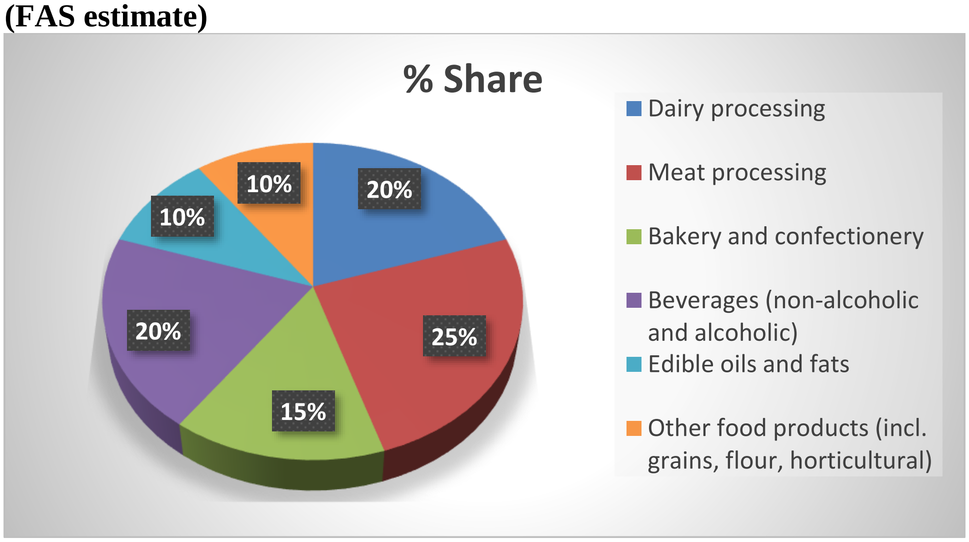


Table 2. Major Companies by Sector

Meat Processing	Milk Processing	Confectionery
Bella Bulgaria AD	Milky Group Bio	Nestle Bulgaria AD
Boni Holding	OMK AD	Mondelez Bulgaria Holding
Ameta Holding	Cremio	Smart Organic
Gradus	Beliisa Milk	Zaharni Izdelia Varna EOOD
KEN	Danone Serdika AD	Prestige 96 AD

This table is not comprehensive, and companies are not ranked by production value or volume. For further information, please contact the FAS office in Sofia, Bulgaria.

Food Standards and Regulations

Bulgarian food safety and marketing standards and regulations are harmonized with the EU. Phytosanitary and sanitary control is applied to imported and exported goods with plant and animal origin. For each stage of the food chain, from the plant and animal products to the final customer, there are EU harmonized requirements for working conditions and hygiene. The local food industry has introduced the Hazard Analysis Critical Control Point (HACCP) system as well.

For more information on labeling requirements, food regulations, and standards, including new requirements for organic products, please see FAS Sofia's FAIRS report or refer to the FAS officehttps://bg.usembassy.gov/embassy/sofia/sections-offices/foreign-agricultural-service/ in Sofia. Additional information can also be found on the European Food Safety Agency and Bulgarian Food Safety Agency websites. Also, check the U.S. Mission to the EU webpage.

SECTION III. COMPETITION

U.S. agricultural and food exports to Bulgaria face strong competition from EU suppliers, including Romania, Germany, Greece, Poland, the Netherlands, Spain, and Italy, as well as non-EU producers from Türkiye, Serbia, Ukraine, Moldova, and the PRC. U.S. products are generally positioned as high-quality or specialty items, while EU and regional suppliers dominate price-sensitive categories such as dry legumes, canned fruits and vegetables, fish, seafood, fresh fruits, and fruit juices due to lower costs, faster logistics, and tariff advantages.

Despite these challenges, U.S. exporters hold niche strengths in certain segments. American almonds, pistachios, barbecue sauces, craft whiskeys, and specialty wines benefit from strong quality recognition. Ethnic foods, including Tex-Mex and Cajun products, could also gain popularity. Overall, U.S. suppliers compete on quality, variety, and brand reputation, while regional and EU competitors lead in volume and price-sensitive categories.

Table 3. Overall competitive situation for U.S. exports

Product	Major Suppliers	Market Summary
Dried fruits and nuts	Türkiye, USA, Vietnam, Greece	Lower prices from competitors, but U.S. products dominate in almonds and pistachios due to quality.

Dry legumes (peas, lentils, and beans)	Egypt, Ukraine, Ethiopia, Türkiye, Russia, Canada Greece, Argentina	Bulgaria imports almost all dry legumes. Competitors offer lower prices. Challenges are the EU tariffs on dried beans and the Comprehensive Economic Trade Agreement (CETA) between Canada and the EU.
Beef	EU countries, Argentina, Uruguay, Australia, United States	Argentina, Uruguay, and Australia are major non-EU suppliers, as most U.S. beef tends to be more expensive.
Fish and seafood	EU countries, Norway, Türkiye, Morocco, Canada, Vietnam, PRC	EU suppliers are price competitive and able to supply faster and cheaper the fish and seafood varieties demanded by local consumers. U.S. disadvantages are the tariffs and CETA FTA.
Sauces, salad dressing and seasonings	EU countries, Serbia, Ukraine, Türkiye, United Kingdom	The United States is a well-known supplier of price competitive BBQ sauces with high quality and the ability to supply a variety of regional sauces.
Canned fruits and vegetables	EU countries, Türkiye, Serbia, PRC	Price competitive.
Distilled Spirits	Scotland, Ireland, United States	Scotch whiskeys dominate the imports in Bulgaria, followed by Irish and U.S. whiskeys. U.S. whiskey market share is about 10 percent. U.S. craft whiskeys could find good acceptance in Bulgaria.
Wine	France, Italy, Germany, Spain, North Macedonia, and New World	Competitive prices due to the absence of duties within the EU. Quality creates opportunities for U.S. wines. Strong domestic production and competition from New Zealand, North Macedonia, South Africa, and Chile.
Fruit and vegetable juices	EU countries, Türkiye, Serbia	Lower prices from the EU. However, Florida juices have a good reputation.
Ethnic Foods	PRC, Japan, India	Interest in Tex-Mex products and other regional U.S. cuisines, e.g. Cajun.
Rice	Myanmar, Greece, PRC, Italy, Türkiye, Pakistan, Australia, India	Asia offers quality and low-price products.
Fresh fruits	Türkiye, Greece, Ecuador, Germany, Netherlands, Poland, North Macedonia	Preference is given to EU suppliers and neighboring countries due to tariffs, EU phytosanitary barriers, and quick logistics.

Source: FAS Sofia

SECTION IV. BEST PRODUCT PROSPECTS

- U.S. Products Present in Market with Good Sales Potential - best U.S.-origin opportunities in the HRI sector are distilled spirits, wine, dried fruits and tree nuts (almonds, pistachios, walnuts, and pecans), peanuts, fish and seafood (hake, pollock, salmon, herring, mackerel, squid, lobster, scallops), beef, craft beer, snacks, and popcorn.
- U.S. Products Not Present in Market with Good Sales Potential - legumes, rice, dairy products (ice creams), fresh fruits (citrus), fruit juices, spices, ethnic products, frozen vegetables, salad dressings, tomato paste.
- U.S. Products Not Present in the Market due to Significant Barriers - food additives not approved by the European Commission, red meat and meat products with hormones, most poultry and eggs, biotech-derived products.

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

If you have questions or comments regarding this report, require listings of local importers and institutions or need assistance exporting to Bulgaria, please contact FAS's Agricultural Affairs Office at the U.S. Embassy in Sofia.

Agricultural Affairs Office (FAS Sofia) Physical Address: U.S. Embassy, 16 Kozyak Str., 1408 Sofia, Bulgaria https://bg.usembassy.gov/foreign-agricultural-service/	Phone: +359-2-939-5774 +359-2-939-5720 Email: agsofia@usda.gov

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Attachments:

No Attachments.