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Report Highlights:

Bulgaria is a small but growing market for U.S. food and agricultural products. In 2021, total Bulgarian food and agricultural imports were valued at $6.13 billion, up 18 percent from 2020, of which 1.3 percent, or $80.13 million, were sourced from the United States. During the first eight months of 2022, total food and agricultural imports increased by 45.3 percent compared to the same period in 2021. Despite COVID-19 and the resulting economic slowdown in 2020 and 2021, U.S. food and agricultural imports grew by 17 percent during the same period. U.S. products are increasingly popular in Bulgarian hotels, restaurants, retail outlets, and among food processors. Consumer-oriented products with strong market potential include distilled spirits, tree nuts, groundnuts, dried fruit, wine, beef, fish and seafood products, craft beer, bio and organic products, food preparations, and innovative food processing ingredients.

Market Fact Sheet: Bulgaria

Executive Summary

Although Bulgaria's GDP growth had been close to 3 percent in 2017 and 2018, and 4 percent in 2019. In 2020 it dropped by 4 percent in the wake of COVID-19 and in 2021 it grew by 7.6 percent compared to 2020. Exports generate 49 percent of Bulgaria's GDP and are a pillar of the economy. EU Member States are Bulgaria's primary trading partners, although there are wide disparities in the balances of trade. In 2021 Bulgaria ran a $2.46 billion trade deficit in goods. Agriculture makes up 5 percent of Bulgaria's GDP.

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. Low marketing costs.	Some U.S. exports are disadvantaged because of EU non-tariff barriers and import duties.
Opportunities	***Threats***
Growing incomes, increasing demand for high-value products, fast developing food retail network, consumption habits changing towards high-quality products.	Domestic producers receive EU funds to upgrade production efficiency and product quality, which can lower demand for imports.

Imports of Consumer-Oriented Products

U.S. goods exported to Bulgaria must meet EU sanitary and phytosanitary requirements. For more specific information, see Post's Food and Agricultural Import Regulations and Standards report. In 2021 consumer-oriented food imports were $3.28 billion, a 14.3 percent increase compared to 2020.

Food Processing Industry

The Bulgarian food processing industry enjoys steady growth. Leading food processing sectors include dairy, bakery, sugar, confectionery, sunflower oil, red and poultry meat, eggs, soft drinks, horticultural processing, and wine production.

Food Retail Industry

Bulgarian grocery retail sales reached BGN 12.2 billion ($7.07 billion) in 2021. Modern retail sales accounted for BGN 7.43 billion ($4.3 billion) or 61% and BGN 4.78 billion ($2.77 billion) in traditional channels. The total number of grocery outlets was 38,955, with the largest retailer, Kaufland, accounting for nearly 28 percent of sales among the top 10 largest food retailers. Grocery e-commerce expanded significantly due to COVID-19 but still has growth potential. Urban consumers are increasingly demanding higher quality, as well as products perceived as "healthy".

Quick Facts CY 2021

Imports of Consumer-Oriented Products
($3.28 billion)

Top 10 Growth Products in Bulgaria
(Imported from the World):

1) Sunflower Seeds
2) Food Preparations
3) Swine Meat
4) Waters
5) Bread, Pastry, Cakes
6) Cocoa Preparations
7) Cane or Beet Sugar
8) Tomatoes, Fresh or Chilled
9) Whiskies
10) Coffee, not Roasted

Food Industry by Channels ($ billion) 2021

Consumer-Oriented Products Imports	3.28
Consumer-Oriented Products Exports	2.17
Food Exports – Agricultural and Related Products (2021)	8.55
Food Imports – Agricultural and Related Products (2021)	6.13
Food Retail	7.07
Food Service	2.57

GDP/Population

Population *(million)*: 6.52
GDP *($ billion)*: 80.5
GDP per capita *($)*: 11,700
Bulgarian National Bank's 2021 Average Exchange Rate: $1=BGN 1.727

Sources: Euromonitor, Eurostat, Bulgarian National Bank, Bulgarian National Statistical Institute, Local sources

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Market Overview

The Bulgarian National Bank's 2021 average exchange rate of $1.00 = Bulgarian Lev (BGN) 1.727 was used in this report.

Despite the COVID-19 epidemic situation after March 2020, Bulgaria's food processing and retail sectors continued to operate and develop. Consumer trends shifted in favor of staple foods and online purchases, leading to notable declines in high-end and impulse consumption. The grocery retail market quickly adapted by responding to the unusual environment and thus continued developing in 2020 and 2021, with significant growth in online commerce. The hotel, restaurant, and institutional (HRI) foodservice industry grew year-on-year until early 2020. The industry was the most severely hit by the COVID-19 pandemic after March 2020, with a significant drop of nearly 45 percent of food service sales at restaurants and hotels as the outlets have closed, tourism has halted, and public outings have been reduced. In 2021, due to the ease of the COVID-19 measures and the strong summer and winter tourist seasons, the industry started rebounding and registered nearly 25 percent growth compared to 2020, though still far from the pre-pandemic levels.

2022 brought new challenges to the food industry such as post-COVID recovery, the war in Ukraine, supply chain disturbances, and growing inflation (18.7 percent in September 2022). All these issues resulted in significant price increase of energy and grocery products and diminished consumers' purchasing power. This required the grocery retail, food service, and food processing industries to adapt quickly to the new environment, which they successfully did. According to the Bulgarian National Statistical Institute (NSI), GDP grew by 4 percent in the first and second quarter of 2022 and by 3.3 percent in the third quarter, compared to the same periods of 2021, unemployment is very low at 3.7 percent, and both exports and imports increased substantially by the third quarter of 2022.

According to the European Commission (EC), Bulgaria's economic expansion is expected to slow down in 2023, before somewhat higher growth resumes in 2024. Price increases and higher borrowing costs are set to weigh on household consumption. Export growth is forecast to slow down, in line with the subdued foreign demand until the end of 2023 and then rebound in 2024. With inflation gradually slowing down, the GDP growth is projected to accelerate from 1.1 percent in 2023 to 2.4 percent in 2024.

General Economy

Bulgaria is a market economy and government intervention in international trade and among foreign investors has decreased considerably since 1989. Exports generate 48 percent of GDP and are a pillar of the country's economy. Bulgaria's biggest exports are industrial supplies, consumer goods, fuels, and petroleum.

Table 1

National Economy	**2019**	**2020**	**2021**
GDP (billion BGN)	120.396	120.553	139.012
GDP (billion USD)	69.19	75.63	80.49
GDP per capita (BGN)	17,259	17,386	20,212
GDP per capita (USD)	9,919	10,907	11,704
Exchange Rate	**$1=BGN 1.74**	**$1=BGN 1.594**	**$1=BGN 1.727**

Source: Bulgarian National Bank

According to Intrastat data from the NSI, total 2021 U.S. agricultural imports into Bulgaria reached $80.13 million, up 1 percent from 2020. According to Trade Data Monitor (TDM), which reflects reported Eurostat data, in 2021 the United States imported $193 million of agricultural and related products from Bulgaria. Data indicates that bilateral trade between Bulgaria and the United States is sustainable.

Geography and Demographics
Bulgaria is located in southeastern Europe and is an important commercial hub between Europe and Asia. According to the latest NSI population census from September 2021, Bulgaria's population totaled 6.52 million people, accounting for 1.5 percent of the EU's population, and a total area of about 111,002 square kilometers. About 64,000 square kilometers of the Bulgarian territory is agricultural land.

Bulgaria has relatively well-developed and improving infrastructure, including six highways with a total length of 830 km., 4,031 km. railway network, four international airports, two seaports on the Black Sea, and numerous ports on the Danube River. Five pan-European corridors cross the country link Northern and Western Europe with the Middle East and North Africa. There are four commercial airports, in Sofia, Varna, Burgas, and Plovdiv. The largest airport is in Sofia. The number of passengers via Bulgarian airports increased significantly from 3.9 million in 2020 to 5.3 million in 2021, mainly due to the easing of COVID-19 related travel restrictions.

Both sea and river freight routes offer reliable international shipping transportation. The largest Bulgarian seaports are Varna and Burgas on the Black Sea coast. The Danube River is navigable during most of the year for inland barge traffic. With the Rhine-Main-Danube canal in use since 1992, Bulgaria has access to large European ports on the North Sea. The main Bulgarian ports on the Danube River are Ruse, Lom, and Vidin.

Bulgaria's capital, Sofia, has 1.3 million residents and is situated in the country's southwestern region. The second and third largest cities are Plovdiv in southcentral Bulgaria, with a population of nearly 500,000 people, and Varna on the west coast of the Black Sea, with a population of close to 400,000 people. As in many other EU countries, Bulgaria's population is aging and nearly 24 percent of the total population is over the age of 65.

Younger Bulgarian consumers tend to have higher incomes, bigger purchasing power, purchase higher-quality products, visit restaurants, and travel more than older generations. Many older consumers and retirees often receive less pay (or pensions) and limit themselves to the staple products and basic needs. In 2021, the average annual salary in Bulgaria was about BGN 18,400 ($11,250). Due to the high inflation, for the first nine months of 2022 the average salary increased to about BGN 1,700 ($985) per month. As of October 2022, the average annual pension is about BGN 8,700 ($5,040). The data demonstrates that young people have twice the purchasing power of pensioners. There are also significant consumption differences between urban and rural consumers. Bigger cities tend to have lower levels of unemployment and higher incomes (therefore more young people).

Table 2. Advantages and Challenges

Advantages
Higher consumption of food and edible fishery products is creating demand for more imports.

Migration of people from rural to urban areas continues at a rapid pace.
Bulgarian market is accessible by sea.
Growing food processing industry is looking for new imported food ingredients.
Efficient domestic distribution network.
Marketing and advertising costs are relatively low.
Challenges
U.S. products are disadvantaged because of duties versus products from EU Member States and countries with EU free trade agreements (FTAs).
Bulgarian domestic producers are receiving European funding to upgrade production efficiency and product quality.
Bulgarian farmers increase agricultural production, reducing demand for imports in the country.
Exchange rate fluctuations and the strong dollar disadvantage U.S. shippers. Bulgarian Lev has a fixed exchange rate against the Euro (€1.00 = BGN 1.95583)

I. Exporter Business Tips

Entry Strategy

Bulgarian convenience stores, supermarkets, and hypermarkets generally purchase from local importers, wholesalers, and producers. There has been a recent shift toward direct imports to avoid higher cost associated with purchasing from importers or intermediaries, but this remains limited. The best method to reach Bulgarian retail buyers and prospective importers is to reach out to FAS Sofia for assistance and guidance. Product catalogues and price lists are essential, and samples are helpful. The bigger retailers in Bulgaria include Kaufland, Lidl, Metro, Billa, Fantastico, T-Market, and CBA. For more information, please see FAS Sofia's Retail Market report.

A visit to Bulgaria is strongly recommended to establish meaningful relationships with Bulgarian buyers. While visiting Bulgaria, it is advisable to bring product samples to show to potential buyers, as many importers and retailers rely heavily on subjective factors when deciding on new products to represent. Bulgarian businesses are usually interested in several products instead of single product lines. Trial orders to test the market may be considered. Many importers specialize in certain product categories and often join to consolidate shipments to lower associated risk and costs. Post recommends that companies contact FAS Sofia in advance for guidance when arranging a trade visit to Bulgaria.

Sales and Marketing

Although sales and marketing strategies in Bulgaria are still evolving, it remains a price-sensitive market and discounts are commonly used and expected. U.S. food and beverage suppliers, particularly those in higher-value categories, may seek to mitigate demands for discounts by focusing on market education, sales training, and brand development. U.S. suppliers are strongly advised to consider providing marketing support to importers for new-to-market products. More Bulgarian consumers are willing to pay premium prices for foods and beverages perceived as "healthy" or "nutritious". Nuts and dry fruits, fish and seafood, bakery products, confectionery products, soups, oils and fats, and a wide range of nutritional supplements are some examples of product categories for which marketing strategies based on nutritional and health messages have proven to be successful.

Bulgarian Business Customs

Bulgarian business contacts tend to be direct and informal in their approach and do not observe the strict business protocols found in some markets. Although procurement and purchasing managers are always searching for new products, they tend to be thorough in product evaluations. They like to see product samples and will often place small trial orders to test the market's response. Some local customs are worth observing. Offering holiday greetings and giving small gifts during major holidays (Christmas, New Year, and Orthodox Easter) are common and appreciated. These holidays are also busy sales periods and U.S. companies may consider introducing new products to coincide with the holiday seasons. For example, many bakery product companies purchase baking ingredients as early as February or March for Easter cake sales, depending on the Orthodox calendar.

Language Barrier

Speaking Bulgarian is not essential to do business in the country, but U.S. companies are advised to verify the level of English fluency of their potential business partners. Many Bulgarian residents speak English well, especially those under 40 in urban areas. Translation services are relatively easy to find. Written materials such as company information, product brochures, etc., will resonate much more if translated into Bulgarian.

II. Import Food Standards, Regulations, and Import Procedures

U.S. companies should observe product-labeling requirements vis-à-vis health or nutritional claims, which require approval by the Bulgarian Food Safety Agency and Ministry of Agriculture, Food, and Forestry. Supplementary labels (*e.g.*, stickers) must also be translated into Bulgarian and should include the product type, product name, names of the manufacturer and importer, full list of ingredients, and shelf life. Bulgaria also introduced country-specific labeling requirements for certain products. For example, dairy-based product containing vegetable oil, cannot state it is a "dairy product" and must be labeled as "Imitation Product Containing Milk". Additionally, cheese containing vegetable oils cannot be classified as cheese, but should be labeled as “containing vegetable oil”. For more information on labeling requirements, food regulations, and standards, including new requirements for organic food products, please see FAS Sofia's Food and Agricultural Import Regulations and Standards report or refer to FAS Sofia. Additional information can also be found on the FAS Europe's website, the European Food Safety Agency, and Bulgarian Food Safety Agency websites.

III. Market Sector Structure and Trends

Food Imports

By 1989, Bulgaria's leading trading partner was the Soviet Union, which accounted for 65 percent of exports and 53 percent of Bulgarian imports. Today, other EU markets are Bulgaria's primary trading partners. Over 80 percent of the consumer-oriented products are imported to Bulgaria from other EU countries.

Bulgaria's top EU food and agricultural trading partners are Romania, Netherlands, Germany, Greece, Poland, Spain, and Italy. Agricultural trade with these countries accounts for 77 percent of Bulgaria's total agricultural trade within the EU. Main non-EU food and agricultural trading partners are Turkey, Serbia, Ukraine, China, United Kingdom, and the United States.

Table 3. Bulgaria's Agricultural Export and Import Statistics 2019-2021

International Transactions *Billion EURO*	2019	2020	2021	Percent Change 2021/2020
Exports (FOB)	4.79	4.79	6.04	26.2
Imports (CIF)	3.70	4.00	4.42	10.5
Commodity Circulation	8.50	8.78	10.46	19.1

Source: Ministry of Agriculture and Food – Agrarian Report 2022

According to TDM data, Bulgarian agricultural and related products exports during the period January - August 2022 increased by 33.7 percent, while the imports grew by 45.3 percent compared to the same period of 2021. FAS Sofia (Post) expects these trends will remain similar for the remainder of 2022 as a result of post-COVID recovery of tourism and food service industries.

Imports from the United States: According to Intrastat data from the Bulgarian NSI, imports from the United States topped $80.13 million in 2021, up 1 percent from 2020. Bilateral trade relations are friendly and demand for U.S. agricultural exports is stable. According to TDM statistics, despite the strong U.S. dollar, supply chain disturbances, and growing inflation, U.S. food and agricultural trade to Bulgaria from January to August 2022 grew by over 17 percent.

Bulgaria's EU accession in 2007 negatively affected U.S. fruit product imports, as EU horticultural products gained duty-free and facilitated access. EU FTAs also threaten U.S. exports, as some third-country products enter Bulgaria and other EU Member States with low tariffs or duty-free. EU trade barriers also effectively ban U.S. poultry meat (since 1997) due to U.S.-approved pathogen reduction treatments, despite the added hygiene and product safety.

The EU retaliatory tariffs imposed in June 2018, negatively affected U.S. agricultural exports to the EU, including Bulgaria. The tariffs are suspended as of December 1, 2021. Post will continue to monitor the situation and report on related new developments concerning U.S. agricultural exports to Bulgaria.

Food Processing Sector

The Bulgarian food processing industry has developed rapidly in recent years. U.S. food ingredient products compete with similar imports from other EU Member States and from growing local production. Related U.S. products and/or associated ingredients with good sales potential in Bulgaria's food processing sector include tree nuts, peanuts, dried fruits, beef, and seafood products. Given the upward agricultural trade and the fact that the food processing sector did not suffer serious damage from the COVID-19 pandemic, FAS Sofia expects that it will fully recover in 2023. For more information about the Bulgarian food processing sector, please refer to FAS Sofia's Food Processing Ingredients report.

Food Retail Sector

Total 2021 number of grocery retail outlets in Bulgaria was 38,955, down 5 percent from 2020, of which 3,354 were modern trade grocery outlets. According to Euromonitor, modern-retail sales in 2021 reached BGN 7.43 billion ($4.3 billion) and accounted for 61 percent of market share. The remaining 39 percent, or BGN 4.78 billion ($2.77 billion), was held by 35,601 traditional grocery outlets.

Despite the turmoil and initial uncertainty caused by the COVID-19 pandemic, grocery retail sales rose slightly year-on-year by 1.7 percent in 2020 and 1.2 percent in 2021. In 2021 the revenues of all the largest grocery retail chains in Bulgaria increased by up to 15 percent from 2020.

FAS/Sofia expects that in the next few years the food retail industry will continue to adapt to changes in demand and will slightly expand its presence in the market, particularly in the modern trade segment. For more information about the retail market, please see Post's Retail Market report.

HRI Sectors

HRI in Bulgaria is still maturing and does not have long professional traditions, especially in the high-value segment. Prior to the COVID-19 outbreak, these sectors have developed dynamically with tourism and shopping malls being a main driver. Bulgaria's HRI foodservice industry grew year-on-year until early 2020. The industry was the most severely hit by the COVID-19 pandemic with a significant drop of nearly 45 percent of food service sales at restaurants and hotels as the outlets have closed, tourism has halted, and public outings have been reduced.

The Government of Bulgaria (GOB) introduced a tax relief measure to help the food service industry. The measure was extended until December 31, 2023. Bulgaria's value added tax (VAT) was reduced from 20 percent to 9 percent for restaurant and catering services (alcoholic beverages were excluded from this measure).

In 2021, Bulgaria's tourism enjoyed strong summer and winter tourist seasons and registered up to 50 percent growth over the same period in 2020. Although the still existing mandatory anti-COVID measures applied by the food service operators in 2021 limited the recovery, the industry started rebounding and registered nearly 25 percent growth compared to 2020 but was still about 28 percent down from the pre-pandemic 2019 (Source: Euromonitor). Industry players with online channels established during the pandemic were less negatively affected by the pandemic.

In 2022, the summer season reached nearly 90 percent of the 2019 summer season tourism. Despite the war in Ukraine and the lack of tourists from Russia, Ukraine, and Belarus, the preliminary data for the 2022 winter tourism season is very good. The food service industry rebound continued and is expected to register more than 15 percent growth compared to 2021. The major problems the industry faced in 2022 were the war in Ukraine, growing inflation, decreasing consumers' purchasing power, and supply chain disturbances. FAS Sofia expects that Bulgaria's HRI industry will keep the upward recovery trend but will need up to 24 months to fully recover and reach the pre-pandemic 2019 level. For more information about the Bulgarian HRI food sectors, please see Post's latest HRI report.

Organic Foods Sector

The Bulgarian organic market continued to grow in 2021 with an estimated annual growth of 2.5 percent to $39 million. The main driver behind the growth was the stronger consumer focus on a healthier lifestyle and increased popularity of organic products perceived as healthful, which led to higher retail sales. The better summer tourist season, open farmers' markets, and a more liberal regime for food service industry operations also supported the increase in sales. Demand for organic packaged food and beverages kept growing in 2022 by about 5 percent due to favorable consumer trends and improved prospects for the food service sector. FAS Sofia expects the moderate upward trend to continue in the following years by up to 7 percent year-on-year. The accelerating food inflation may have a negative impact, shifting consumers' choice to conventional foods/beverages.

Imported organic, high-value consumer products dominated with an estimated 60 percent market share. Imported organic products are trusted for being genuinely organic. Increasing number of multinational brands have launched organic versions of their products. U.S. exporters can find detailed information about how to export organic foods to Bulgaria here. More information about the organic food sector in Bulgaria can be found in FAS Sofia's Organic Market report.

IV. Agricultural and Food Imports

Despite COVID-19 related problems in 2020, and the continuing uncertainty in 2021, Bulgaria's imports of consumer-oriented products kept growing. Their imports for the first eight months of 2022 also increased by nearly 9 percent.

Table 4. Best Consumer Oriented Product Prospects

Product	2021 Imports ($ millions)	Import Tariff Rate	Constraints over Market Development	Market Attractiveness for U.S.
Grape Wines	40.08	Up to 32.00 Euro/HL depending on type. Exact information is available in the EU Official Journal (Chapter 22) Excise Tax = 0 VAT = 20 percent	Bulgarian wines still dominate the market. Imported wines in 2021 account for about 17 percent of total wine volume.	While many Bulgarians prefer local wines, imports are growing. Local wine importers are increasingly aware of U.S. wines. Information about the Bulgarian wine sector can be found here.
Tree Nuts (HS 0802) and Ground Nuts (HS 200811 - 200819 and HS 1202)	94.05	From 0 to 12.8 percent depending on type. Exact information is available in the EU official Journal. (Chapter 8 for HS 0802; Chapter 20 for HS 2008; Chapter 12 for HS 1202)	Greece, Turkey, and Poland for tree nuts and Turkey, Argentina, Nicaragua, and China for ground nuts are the main competitors to U.S. exporters in Bulgaria.	U.S. tree nuts are dominant in the Bulgarian market. For more information, see FAS Sofia's Tree Nuts Annual report here.

Distilled Spirits (HS 2208)	129.44	See the TARIC database here. See the website of the General Taxation and Customs Union Directorate here.	Scotch and Irish whiskies dominate in Bulgaria. U.S. whiskey market share is about 10 percent.	For more information see FAS Sofia's Distilled Spirits Market brief report here.
Food Preparations (HS 2106)	172.01	Varies by type. Detailed information on food preparations tariffs can be found in the official EU Journal in pages 173-174.	Strong competition from other exporters (mainly from the EU).	U.S. food preparations can successfully increase their market share through marketing campaigns, due to the high quality of the products.
Beef and Beef Products	52.35	For more information see USDA EU-27's Food and Agricultural Import Regulations and Standards Report (page 58).	Strong competition from Latin America and Europe. U.S. beef costs more than imported beef from other markets. Limited purchasing power of the average Bulgarian consumer.	Awareness of U.S. beef in Bulgaria is growing. FAS Sofia works on creating positive perception about U.S. beef by educating the main buyers (restaurants, hotels, and retailers) about its quality and diversified tastes.
Fish Products	140.58	EU seafood tariffs range from zero to 23 percent. More detailed information on seafood tariffs can be found in the official EU Journal in Chapter 3 (pages 47-69) and Chapter 16 (pages 137-139).	Bulgarian market is supplied with various types of fresh and frozen fish. Frozen fish is well accepted by the consumers. The consumption of other types of sea food is also increasing.	Growing demand for fish offers opportunities for U.S. exporters. U.S. products compete with fish and seafood from within the EU, Canada (FTA with EU), Turkey, Norway, Morocco, China, Vietnam. For more information see FAS Sofia's Fish and Seafood Market brief report here.

Source: OAA Sofia and Trade Data Monitor (TDM) based on Eurostat

V. Key Contacts and Further Information

If you have questions or comments regarding this report, need assistance exporting to Bulgaria, a list of Bulgarian wholesalers and distributors, or are you looking for the Foreign Buyers Lists (FBL) of various consumer-oriented and seafood products, please contact the U.S. Office of Agricultural Affairs (FAS Sofia).

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Attachments:

No Attachments.