USDA Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network
Template Version 2.09

Voluntary Report - public distribution

Date: 4/20/2007

GAIN Report Number: BU7008

Bulgaria

Fishery Products

Bulgarian Fish Imports Update

2007

Approved by:
Susan Reid
US Embassy

Prepared by:
Patrick Nord

Report Highlights:
Bulgaria's recent accession to the European Union will rpovide stimulus for further growth and expansion in the already growing market for fish and fishery products. Imports of fish and fishery products have increased overall over the past 5 years, with key factors being the decline in the local fish supply and a growing demand for varieties not found in domestic fishing grounds. Another major factor is Bulgaria's recent accession to the European Union, which changed the import tariff regime. Very low per capita fish consumption in Bulgaria, together with strongly growing demand, offer excellent opportunities for U.S. exporters to expand sales to this market.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Sofia [BU1]
[BU]

Summary

Over the past three years the fish and fish products market has continued the growth trend that started in 2000. Bulgaria has imported higher quantities (both in value and tons) of fish products since 2003. This growth and development is reflected by the increasing number of retailers and food service outlets offering a larger variety of fish and fish products (2003: 50-60 varieties; 2007: 70+). Increasing consumer income and awareness and greater availability of fish are the primary factors contributing to the expansion of the Bulgarian market. These factors and a generally more liberal trade regime with Bulgaria's accession to the European Union are expected to contribute to further growth in the Bulgarian market.

Domestic supply of fish has declined since 2002, from 15,419 MT in 2002 to 5,434 MT in 2005. Fish farming is becoming a larger industry in Bulgaria with expansion into the market specifically targeted for exports (total number of fish farms: 2003: 127; 2005: 204). Value of aquaculture production is also significantly increasing-- mussel farms have more than quadrupled in number since 2003 (2003: 3; 2006: 15)

U.S. imports have decreased since 2003 in tonnage but increased in value (2003: 7,160 MT, 2006: 3,265 MT; 2003: USD 3,064,000, 2006: USD 4,069,000). A shift towards higher value/higher quality fish and fish products is occurring as consumers are becoming aware of the previously unavailable varieties. One of the major challenges facing U.S. imports is the lack of knowledge. Consumers are generally unaware of the differences in fish products and often do not know how to prepare fish other than trout, mackerel, carp and sprat.

Production

Prior to 1989, Bulgaria produced large quantities of seafood, and the majority of the products available were locally produced fish (mackerel, trout, carp and sprat) with very limited imports. After 1989 the industry went through a major restructuring as the fleets, fisheries and processing plants were privatized. In 2000, the industry started registering its first years of growth but since 2002 the total catch has declined each year. Measures have been implemented by the Ministry of Agriculture to increase the fish population and total catch numbers. A computerized system is being implemented by GOB to provide up to date and accurate figures on the quantity of fish caught and prices.

Black Sea Production

Pre-1989, Bulgaria's sea fishing fleet was state owned and operated. Government regulations were such that the main fish that were available were those that could be caught by the national fleet, with exports being minimal. To meet domestic demand, the Bulgarian national fleet significantly over-fished the Black Sea, and the population of mackerel, turbot, sprat and anchovies was decimated. A second factor that has reduced supply is pollution levels in the Black Sea, often in the form of introduction of non-native species.

Privatization of the fishing fleet post-1989 initially caused a drop in the total catch from the Black Sea. Private companies became fully functional by 1999 and the total catch numbers rose, but since 2002 the total catch has significantly declined, especially of the most popular fish species — mackerel and turbot. Domestic mackerel supply is no longer large enough to meet domestic demand; in 2005, 5,356 MT of mackerel was imported from the United States.

- Sprat — in 2005 sprat accounted for more than three quarters of the total catch, down from the nearly 90 percent in 2002 and 2003 but up from 50 percent in 2004. Sprat is not in high demand in Bulgaria or as an export; in 2005 average domestic price per kilogram was between .75 and .95 USD (source: Bulgarian Ministry of Agriculture, Agency of Fisheries and Aquaculture).
- Mackerel — mackerel is the most consumed fish in Bulgaria and is the fish with which consumers are most familiar. Recent increases in price of U.S. Atlantic mackerel have caused some Bulgarian importers (mainly those working in the lower end of the sector) to import from other third countries- mainly South American imports of lower quality Pacific mackerel.
- Turbot — the Government of Bulgaria (GOB) imposed quotas to prevent over-fishing of this species in the Black Sea. A quota of 50 metric tons (MT) was set in 2003, but this quota was not meet (40.8 MT produced). In 2007 the GOB set the quota at 30 MT.

Table 1: Black Sea Production

2002-2005 Black Sea Fish Production (metric tons)				
Fish Species	*2002*	*2003*	*2004*	*2005*
Sprat (*Sprattus Sprattus*)	11,595.0	9,154.5	2,889.1	2,574.7
Sea Snails (*Rapana spp.*)	698.0	324.6	2,427.9	510.9
Black Sea Anchovy/ sprat (*Engraulis Encrasicholus Ponticus*)	237.0	141.0	87.9	14.3
Goby (*Gobidae*)	141.5	125.2	78.8	48.9
Mediteranian Horse Mackeral (*Trachurus Mediterraneus Ponticus*)	141.5	141.6	73.9	29.4
Other	735.3	322.1	258.0	230.1
Total	*13,548.3*	*10,209.0*	*5,815.6*	*3,408.3*

Source: Bulgarian National Agency of Fisheries and Aquaculture- 2006 numbers not available as of April 2007.
See appendix for full table

Freshwater Production

Total freshwater catch declined 18 percent in 2005 as compared to 2004. Traditionally Bulgarian demand is highest for carp although demand for all freshwater fish is highest in early December due to religious holidays. Trout is also relatively popular.

- Common carp — catch fell more than 25 percent (from 968 MT in 2004 to 716 MT in 2005), but it continues to be the most common freshwater fish.
- Trout — freshwater catch of trout was about 20 MT in 2005, compared with more than 50 MT in 2003.

Table 2: Freshwater Fish Production

2002-2005 Internal Bodies of Water Fish Production (metric tons)				
Fish Species	*2002*	*2003*	*2004*	*2005*
Common Carp (*Cyprinus Carpio*)	521.2	752.0	967.5	716.4
Silver Carp (*Hypophthalmichthys Molitrix*)	307.2	388.9	490.2	528.4
Gold Fish (*Carassius Auratus*)	247.2	307.4	300.0	199.4
Wels Catfish (*Silurus Glanis*)	34.1	25.9	48.3	40.8
Rudd (*Scardinius Erythrophthalmus*)	44.7	35.2	32.0	25.5
Other	303.0	284.8	186.5	153.5
Total	*1,457.4*	*1,794.2*	*2,024.5*	*1,664.0*

Source: Bulgarian National Agency of Fisheries and Aquaculture- 2006 numbers not available as of April 2007.
See appendix for full table

Danube River Production

Fish supply from the Danube is minimal, accounting for less than seven percent of the total catch in 2005. As with other freshwater sources, the fish primarily sought is carp. Challenges similar to those in the Black Sea supply have occurred with Danube river supplies — over-fishing and pollution — and quotas are now in place. Declining total catch numbers are being supplemented by increased production at fish farms.

- Carp — in 2005 various species of carp accounted for nearly one third of all fish production on the Danube. Danube carp remains relatively popular, with domestic prices in 2005 between 2.32 and 2.61 USD per kilogram.
- Danube herring — although 2002 supply was significantly higher than in previous years (approximately four times higher than 2001), it has dropped off since. In 2005, approximately 16 MT were produced.

Table 3: Danube River Fish Production

2002-2005 Danube River Fish Production (metric tons)				
Fish Species	*2002*	*2003*	*2004*	*2005*
Barbel (*Barbus Barbus*)	100.0	51.8	44.3	34.4
Carp Bream (*Abramis Brama*)	24.7	59.8	53.2	30.1
Wels Catfish (*Silurus Glanis*)	22.0	45.5	39.4	27.2
Common Carp (*Cyprinus Carpio*)	17.7	32.7	31.5	19.5
Silver Carp (*Hypophthalmichthys Molitrix*)	19.8	28.8	21.5	21.8
Other	229.4	269.8	214.3	227.1
Total	*413.6*	*488.4*	*404.2*	*360.1*

Source: Bulgarian National Agency of Fisheries and Aquaculture- 2006 numbers not available as of April 2007.
See appendix for full table

Aquaculture

Fish farms and aquaculture are becoming more important and have a larger role on the Bulgarian fish market. Since 2002, there have been significant increases in the number of fish farms for fresh and saltwater fish/fish products. In the years just prior Bulgaria's accession to the EU, subsidies were available for private investment projects, totaling 50 percent of the cost of the project. These subsidies will recommence in a slightly different form at the end of 2007 or beginning of 2008.

- Fish farms — the number of fish farms grew significantly from 2003 to 2005 (127 in 2003 to 204 in 2005). Production at fish farms also increased during this time, both of fish intended for stock (fingerlings) and of mature fish (2003: 15,794,559 total fingerlings; 2005: 26,226,073 fingerlings; 2003: 2,898 MT total fish; 2005: 4,165 MT total fish).
  - Warm water farms (mainly carp) — 123 (increase of more than 60 percent from 2004), of which 118 are carp farms, 4 sturgeon and 1 decorative fish.
  - Cold water farms (trout) — 59 (increase of 30 percent from 2003)
  - Mixed farms — 8 (increase from 5 in 2003)
- Mussels — since 2004, the number of mussel farms has more than doubled (2004: 7; 2006: 15). In 2007 the trend is expected to continue. Farms are also using methods that are more efficient and yield higher supply of higher quality products (2003: 15 MT; 2005: 171 MT)
- Common carp — increase from 881 MT in 2004 to 1,313 MT in 2005. Aquaculture supply of carp more than compensates for the fall in other areas.
- Trout — supply has increased from 880 MT in 2003 to 1,549 MT in 2005.

Table 4: Aquaculture Production

2002- 2005 Aquaculture Production (metric tons)				
Fish Species	*2002*	*2003*	*2004*	*2005*
Steelhead Trout	961.0	880.0	1,555.4	1,549.2
Common Carp	1,099.0	1,091.0	881.0	1,313.2
Bighead Carp	339.0	281.0	521.1	428.1
Russian Sturgeon	80.0	144.0	6.7	281.0
Chanel Catfish	20.0	174.0	0.0	171.2
Black Sea Mussel	0.0	15.0	117.7	170.6
Grass Carp	34.0	63.0	71.6	110.5
European Catfish	37.0	6.0	17.8	39.8
Great Sturgeon	0.0	3.4	3.7	21.5
Balkan Trout	11.0	4.4	4.4	8.2
Other	197.0	236.2	68.6	71.7
Total	*2,778.0*	*2,898.0*	*3,248.0*	*4,165.0*

Source: Bulgarian National Agency of Fisheries and Aquaculture- 2006 numbers not available as of April 2007.

Consumption

Bulgaria consumes the least amount of fish per capita in the European Union, and is one of the lowest consumers of fish and fishery products worldwide. Consumption is increasing but continues to be comparatively quite low (2005: 4.2 kg/person/year; U.S.: 16 kg/person/year). There are problems with underreporting but these are not significant enough to bring Bulgaria's consumption in line with world averages. Consumption has increased in recent years as Bulgarian consumers are becoming more aware of the health benefits of seafood. As the available options for protein will be more limited due to increased restrictions on red meat imports it is likely that consumers will increase consumption of fish and fishery products.

Table 5: Fish Consumption

Fish and Fish Products Consumed (kg/per person/year)				
	2002	*2003*	*2004*	*2005*
kg	3.5	3.8	4.3	4.2

Source: Bulgarian National Agency of Fisheries and Aquaculture- 2006 numbers not available as of April 2007

Growth is mainly focused on high value and specialty fish and fish products, previously unavailable on the market. Large supermarkets (hypermarkets) are expanding selection and availability of products to consumers in large cities, but many towns and villages lack consistent access to a variety of frozen and fresh fish and high quality fish products.

- Super- and Hypermarkets — seven major super and hypermarket chains are working in Bulgaria; two (Metro and Piccadilly) offer fresh seafood at specialty stands in each store. The others offer frozen and cured seafood products.
- Specialty stores- there continues to be a number of small specialty shops that sell only fresh fish. These are the primary source of fish and fish products for Bulgarian consumers.
- Restaurants- in 2004 the first seafood restaurant chain (Captain Cook) opened; they continue to be the only national chain although many local fish restaurants exist along the Danube river and Black Sea. In February 2007, 50,000+ people ate at Captain Cook's largest restaurant. Other restaurants offer a limited selection of fish, often tied to holidays or religious observances.
    - Octopus, calamari, sea bream and mussels are in highest demand at specialty restaurants
    - The market for lobster and crab at specialty restaurants is increasing
    - Sushi is beginning to enter the Bulgarian market, but restaurants generally offer limited selection and are only in large cities. The U.S. Embassy cafeteria serves sushi one day per week.

Trade

Bulgaria is a net importer of fish and fishery products. The majority of all fish and fishery products are frozen (80+ percent) with 70+ percent of these being mackerel. The United States, Canada and the European Union were major suppliers of fish and fishery products in 2005, with the same trend expected to continue. Primary exports from Bulgaria are sea snails and processed fish products (conserves, caviar etc). Bulgaria exported primarily to Romania, Japan and the European Union.

Imports

The total size of the import market is estimated at 27,000 MT for 2006 and it is expected to trend upward in 2007. Total value of imports in 2006 is estimated at nearly USD 27 million; due to increasing prices of fish and fishery products, increased imports of high value fish products and increase in total fish imports, Post projects this figure to increase by at least 10 percent in 2007. U.S. share of imports declined from 37 percent in 2004 to 14 percent in 2006. The value of U.S. imports tripled from 2004-2005 but declined by about a third from 2005-2006 (USD 2,678,000; 2005: USD 6,332,000; 2006: USD 4,070,000).

Table 6: Value of Imports by Country (USD)

2003-2006 Value of Imports				
Country	*2003*	*2004*	*2005*	*2006*
United States	3,562,976	3,970,303	3,343,271	2,877,923
Canada	2,182,286	2,003,172	2,291,744	3,946,057
Greece	754,022	1,111,420	1,511,473	1,775,587
Spain	943,166	616,327	1,959,320	1,200,020
Argentina	816,681	1,347,199	1,293,557	1,224,911
Taiwan	35,664	85,997	1,559,887	1,949,073
Norway	561,279	948,293	865,195	1,000,524
Chile	323,650	548,873	910,746	1,566,726
Italy	45,007	59,663	259,064	2,648,116
China	652	54,702	941,777	1,883,607
Ireland	1,854,698	369,230	412,590	72,095
Germany	624,980	620,175	570,805	585,498
Netherlands	447,182	977,126	553,475	192,395
Denmark	265,610	211,589	838,268	358,666
Great Britain	673,889	880,055	75,450	31,245
New Zealand	57,175	277,252	569,713	508,249
Japan	0	173	71,400	1,186,229
Belgium	140,188	131,848	332,923	552,633
Peru	0	0	0	1,000,488
Lithuania	395,623	184,958	192,496	224,507
Total	14,924,011	15,258,323	19,694,890	26,776,093

Source: Bulgarian Customs Data, 2007

Bulgarian consumers are gradually increasing their demand for mid- to high-quality fish not previously available, although frozen mackerel continues to be the top U.S. export to Bulgaria (2006: 62 percent of value and 73 percent of imports by weight). The most notable movement has been in the salmon and lobster markets. In 2004, the United States exported 16.6 MT of Pacific salmon (USD 19,000) to Bulgaria; in 2006, U.S. exports of Pacific salmon were more than 105 MT (USD 316,000). Exports from the United States of lobster have more than doubled in both weight and total value (2004: .3 MT, USD 6,000; 2006: .7 MT, USD 16,000).

Table 7: Quantity of Imports by Country

2003-2006 Fish and Fishery Product Importers (metric tons)				
Country	*2003*	*2004*	*2005*	*2006*
United States	7,169.7	8,352.5	5,812.1	3,889.6
Canada	4,112.0	3,777.0	4,174.1	6,555.8
Taiwan	39.4	65.5	2,901.8	3,355.0
Argentina	1,106.1	1,471.9	1,595.3	1,296.8
Ireland	3,211.8	697.0	775.0	155.9
Spain	808.7	528.3	2,196.7	1,040.7
Chile	519.4	691.3	1,040.4	1,018.7
Great Britain	1,178.9	1,628.4	119.0	24.8
Netherlands	403.2	1,606.8	674.9	227.0
China	0.0	25.1	649.7	1,987.8
Greece	729.8	504.7	493.6	658.8
Japan	0.0	0.0	95.2	2,113.3
Norway	353.4	1,019.0	287.8	414.8
New Zealand	59.4	374.1	631.4	526.3
Peru	0.0	0.0	0.0	1,368.2
Estonia	0.0	39.0	76.1	978.4
Uruguay	223.3	214.8	269.2	336.1
Germany	281.9	312.8	244.7	181.0
Lithuania	435.6	259.7	148.2	166.8
Turkey	393.6	138.4	295.2	52.1
Total	22,430.6	22,482.2	23,275.0	27,741.3

Source: Bulgarian Customs Data, 2007

Imports of hake, a mid-price fish, have almost quadrupled in value and more than doubled in weight since 2004 (2004: 239 MT; 2006: 574.3 MT; 2004: USD 225,000; 2006: USD 807,000). It is a fish that is popular with consumers and is in constant demand. Bulgarian importers expect this trend to continue.

Table 8: Value of U.S. Exports to Bulgaria

Value of U.S. Exports to Bulgaria (1,000 USD)						
Category	*HTS-6*	*2002*	*2003*	*2004*	*2005*	*2006*
Trout, live	030191	0	0	9	0	0
Carp, live	030193	0	0	27	0	0
Fish live, except trout, eel or carp	030199	0	0	21	35	96
Halibut, fresh or chilled, whole	030221	0	0	0	9	0
Herring, fresh or chilled, whole	030240	0	154	0	0	0
Mackerel, fresh or chilled, whole	030264	68	351	550	704	0
Pacific salmon (other than sockeye) excluding fillets, livers, roes, frozen	030319	71	101	19	705	316
Herrings, frozen, whole	030350	0	0	0	0	10
Whole, Frozen Mackerel	030374	570	2,042	1,317	3,910	2,531
Dogfish and other sharks, Frozen, Whole	030375	0	0	10	0	0
Frozen, Whole Hake	030378	317	93	225	571	807
Fish nes, frozen, whole	030379	0	312	399	359	0
Fish fillets, frozen	030420	0	0	38	31	125
Lobsters (Homarus), not frozen	030622	0	0	6	10	16
Mussels, frozen, dried, salted or in brine	030739	0	0	0	0	113
Cuttle fish, squid, frozen, dried, salted or in brine	030749	0	11	57	0	55
	TOTAL	*1,026*	*3,064*	*2,678*	*6,334*	*4,069*

Source: U.S. Customs Data, 2007

Bulgaria's accession to the European Union will provide a positive stimulus to the fish market as a whole and will make fish imports more attractive. Fish imports are likely to increase because the trade regime of the European Union is friendlier to imports than Bulgaria's trade regime pre-accession, with similar or lower tariffs. Noteworthy is the drop by more than half (from 5 percent to 2 percent) of the tariff on Pacific salmon imports, a product that has been increasing in the past 3 years.

Whole mackerel imports have the potential to be affected; in previous years tariffs have been 10 percent for fresh or chilled and 5 percent for frozen. Under the harmonized trade regime, there are two sets of seasonal tariffs—January 1st- February 14th and June

16th- December 31st, the tariff is 20 percent; February 15th- June 15th, 0 percent for whole mackerel. Bulgarian health code stipulates that frozen mackerel can be sold for human consumption up to 2 years after the catch date. Major importers of American frozen mackerel have plans to shift from importing year-round to primarily importing during this tariff-free period. However, U.S. exports of frozen mackerel are not likely to be greatly affected by the changes in the import regime.

Table 9: Comparison of Duties on Major U.S. Imports to Bulgaria (percent)

Category	*HS-6*	*2006 (Bulgarian Tariffs)*	*2007 (EU harmonized Tariffs)*
Mackerel, fresh or chilled, whole	030264	10	January 1- February 14, June 16 to December 31: 20, Other: 0
Pacific salmon (other than sockeye) excluding fillets, livers, roes, frozen	030319	5	2
Whole, Frozen Mackerel	030374	5	
Frozen, Whole Hake	030378	15	15
Lobsters (Homarus), not frozen	030622	10	8 (live or whole), 10 (other)
Mussels, frozen, dried, salted or in brine	030739	10	10 or 8, depending on species
Cuttle fish, squid, frozen, dried, salted or in brine	030749	10	8 or 6, depending on species

Source: European Union Harmonized Tariff Schedule: October 17, 2006

For full duty listings, visit:
http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_301/l_30120061031en00010880.pdf

Bulgaria is currently facing challenges transitioning to EU requirements. U.S. shipments have been delayed at ports of entry due to unclear understanding by the GOB and Bulgarian border control/veterinary service as to the exact nature of the EU requirements. Post has worked and will continue to work with these agencies and importers to ensure access for U.S. exports to the Bulgarian market. Currently, U.S. imports do not fall into the "third country" category of the EU; the U.S. and EU are discussing policies that will apply solely to U.S. imports, but these currently are not in place. For more information regarding how to import fish and fishery products into the European Union, visit http://www.buyusa.gov/europeanunion/summary_four_six.html or contact FAS/Sofia.

Best opportunities for U.S. Exports to Bulgaria

Bulgarian companies are actively seeking to expand the selection of fish available on the Bulgarian market, especially mid- to high-value products. Imports of U.S. Atlantic mackerel are likely to continue to decline, due to the availability of lower priced, although lower quality products from other countries (mainly South American countries). Food service outlets are providing a major impetus for this shift, with an increasing number offering high quality fish as a regular menu item. Good opportunities exist for U.S. exports of lobster and salmon, as both currently face lower customs duties than in 2006 and increased consumer awareness. Other opportunities exist for U.S. exports to Bulgaria to be repackaged and sold as value added goods throughout the European Union. A detailed list of importers is attached to this report.

Challenges Facing U.S. Exports to Bulgaria

In the short term (6 to 12 months), Bulgaria will face challenges applying new EU regulations. Many of the regulations and certification requirements are either partially or not at all translated into Bulgarian, which increases the likelihood of confusion on the part of border controllers. FAS/Sofia is working with Bulgarian border control, veterinary services and major importers to help clarify and explain the issues connected to imports of fish and fish products.

A structural challenge exists in the limited knowledge of fish and fishery products on the part of Bulgarian consumers. Individual incomes are rising, and consumers are beginning to have more disposable income for high quality products. Consumers, however, are often not familiar with many of the high-value fish varieties. This unfamiliarity prompts many super- and hypermarkets to be reluctant in stocking these varieties. Restaurants are much more likely to test new products, but the small quantities they demand creates a challenge for U.S. exporters.

Bulgarian Exports

Bulgarian exports, in tonnage, are primarily shipped to other countries in the region (Romania, Greece and Turkey) although relatively large quantities are also exported to Japan and Germany. Total exports have fallen since 2003 by more than 20 percent (2003: 5,773 MT; 2006: 4,413 MT) but total value of exports has significantly risen as exports of higher value products, such as sea snails and roe have grown.

For example, although Romania imported 100+ MT more of fish and fishery products than Japan in 2006 (Romania: 677 MT; Japan 545 MT) the value of the imports to Japan were more than triple the value of Romania's imports (Romania: USD 834,907; Japan: USD 2,671,935). Companies that have traditionally imported and sold fish and fishery products with little additional processing have begun to repackage products in efforts to sell products that have added value.

Table 10: Quantity of Bulgarian Exports (metric tons)

2003-2006 Quantity of Bulgarian Exports (metric tons)				
Type of Fish	*2003*	*2004*	*2005*	*2006*
Live fish	120.1	131.0	118.1	160.8
Fish, fresh or chilled, whole	22.7	31.4	19.2	6.1
Fish, frozen, whole	1,437.6	1,399.3	770.1	980.2
Fish fillets, fish meat, mince except liver, roe	7.6	36.4	113.7	336.2
Fish, cured, smoked, fish meal for human consumption	1,319.2	1,352.7	763.1	227.3
Crustaceans	0.7	2.0	0.5	1.2
Mollusks	2,640.7	2,324.7	2,067.1	2,701.5
Total	5,548.6	5,277.5	3,851.8	4,413.3

Source: Bulgarian Customs Data, 2007

Table 11: Value of Bulgarian Exports (USD)

2003-2006 Value of Bulgarian Exports (USD)				
Type of Fish	*2003*	*2004*	*2005*	*2006*
Live fish	188,840	240,625	118	330,833
Fish, fresh or chilled, whole	56,627	85,198	55,995	25,056
Fish, frozen, whole	938,430	1,193,082	1,107,381	1,806,759
Fish fillets, fish meat, mince except liver, roe	28,734	146,861	565,561	1,514,392
Fish, cured, smoked, fish meal for human consumption	2,547,877	1,328,036	1,926,283	1,967,222
Crustaceans	6,257	12,429	6,456	9,119
Mollusks	4,474,556	5,938,108	5,775,288	7,820,967
Total	8,241,321	8,944,339	9,437,082	13,474,348

Source: Bulgarian Customs Data, 2007

Distribution and Marketing

Major advances have been made over the past three to five years in terms of distribution and marketing. One company claims that their products (canned fish products) are in 90+ percent of retail outlets in Bulgaria. Companies working with fresh and frozen fish products have developed individual distribution networks, with warehouses and refrigerated trucks for delivery around the country. This allows for fresh and frozen fish products to be delivered to a much wider market than was possible even a few years ago.

Marketing is still not well developed for fish and fish products; the major fish restaurant chain does not heavily advertise nor do restaurants do fish promotions. At the Hilton Hotel in Sofia, there is a weekly seafood night which is generally well attended. In 2006 the restaurant hosted a weekend promotion focusing on oysters; it was quite popular and the restaurant hosted a similar promotion in February, 2007. Supermarkets and restaurants continue to rely mainly on word of mouth and general consumer trends, which accounts for the relatively slow growth in the market.

FAS/Sofia worked with a local supermarket chain to generally promote American food products in late March, 2007. Part of the promotion was of American fish and fishery products, and included a demonstration of salmon cooking. Similar promotions in the future will increase public familiarity and would likely increase demand for fish.

Appendix 1: Black Sea Production Numbers (metric tons)

2002-2005 Black Sea Fish Production (metric tons)				
Fish Species	*2002*	*2003*	*2004*	*2005*
Sprat (Sprattus Sprattus)	11,595.0	9,154.5	2,889.1	2,574.7
Sea Snails (Rapana spp.)	698.0	324.6	2,427.9	510.9
Black Sea Anchovy/ sprat (Engraulis Encrasicholus Ponticus)	237.0	141.0	87.9	14.3
Goby (Gobidae)	141.5	125.2	78.8	48.9
Mediteranian Horse Mackeral (Trachurus Mediterraneus Ponticus)	141.5	141.6	73.9	29.4
Danube Herring (Caspialosa Pontica)	106.3	55.8	77.9	37.8
Spiny Dog-fish (Squalus Acanthias)	100.0	51.3	47.2	14.5
Bluefish (Pomatomus Saltatrix)	101.5	18.2	4.7	82.9
Black Sea Turbot (Psetta Maeotica)	135.5	40.8	16.2	12.7
Striped Mullet (Mugil Cephalus)	71.0	32.6	17.9	6.4
Blue Mussel (Mytilus Galloprovincialis)	55.0	15.1	33.7	10.4
Atlantic Bonito (Trachurus Mediteranneus Ponticus)	0.0	22.6	17.8	56.2
Red Mullet (Mullus Barbatus)	33.0	35.9	17.0	1.1
Garpike (Belone Belone)	33.6	8.3	4.1	2.2
Leaping Mullet (Liza Saliens)	17.7	15.6	7.8	0.8
Whitting (Merlangius Euxinus)	15.5	12.9	1.5	2.7
Snouted Sole (Solea Nasuta)	9.5	9.0	3.0	0.3
Shore Rockling (Gaidropsarus Mediterraneus)	20.0	0.0	1.0	0.0
European Seabass (Dicentrarchus Labrax)	11.0	0.3	1.0	0.0
European Flounder (Platichthys Flesus Luscus)	9.0	1.0	2.0	0.0
Golden Grey Mullet (Liza Aurata)	7.6	1.3	0.0	0.5
Great Sturgeon (Huso Huso)	3.5	0.6	2.5	0.6
Sturgeon (Acipenser Stellatus)	3.0	0.3	1.0	0.0
Russian Sturgeon (Acipenser Gueldenstaedti)	2.0	0.0	0.5	0.0
Sandsmelt (Atherina Mochon Pontica)	0.1	0.4	1.0	0.8
Prawns (Leander spp.)	0.5	0.1	0.2	0.2
Totals	13,548.3	10,209.0	5,815.6	3,408.3

Appendix 2: Freshwater Fish Production Numbers (metric tons)

2002-2005 Freshwater Fish Production (metric tons)				
Fish Species	*2002*	*2003*	*2004*	*2005*
Common Carp (Cyprinus Carpio)	521.2	752.0	967.5	716.4
Silver Carp (Hypophthalmichthys molitrix)	307.2	388.9	490.2	528.4
Gold Fish (Carassius Auratus)	247.2	307.4	300.0	199.4
Wels Catfish (Silurus Glanis)	34.1	25.9	48.3	40.8
Rudd (Scardinius Erythrophthalmus)	44.7	35.2	32.0	25.5
Grass Carp (Ctenopharyngodon Idella)	23.2	29.5	26.9	31.4
Steelhead Trout (Salmo Gairdneri)	21.4	46.5	21.8	16.3
European Perch (Perca Fluviatilis)	27.4	42.3	16.0	11.0
European Pikeperch (Stizostedion Lucioperca)	18.1	25.1	21.9	16.5
Bleak (Alburnus Alburnus)	19.4	23.3	24.0	11.4
Various other fish	61.0	3.1	0.9	0.5
Bream (Abramis Brama)	5.5	29.8	9.8	10.6
Channel Catfish (Ictalurus Punctatus)	18.2	11.3	18.3	7.2
Sneep (Chondrostoma Nasus)	17.1	14.2	6.7	2.3
European Chub (Leuciscus Cephalus)	17.3	13.1	5.4	2.8
Northern Pike (Esox Lucius)	5.8	7.2	9.7	9.3
Roach (Rutilus Rutilus)	14.2	10.1	4.8	2.4
Danube Crayfish (Astacus Leptodactylus)	7.7	3.5	6.0	4.2
(Barbus Cyclolepis)	0.8	1.0	0.0	17.6
Brown Trout (Salmo Trutta Fario)	16.0	2.4	0.7	0.3
Mediterranien Barbel (Barbus Meridionalis)	9.9	5.3	1.0	1.1
Tench (Tinca Tinca)	3.1	4.2	0.7	1.8
Brook Trout (Salvelinus Fontinalis)	5.6	0.2	1.5	1.9
Asp (Aspius Aspius)	1.3	3.0	2.8	1.9
Black Carp (Mylopharyngodon Piceus)	2.0	3.6	0.9	2.1
Barbel (Barbus Barbus)	4.3	1.2	2.6	0.1
Vimba (Vimba Vimba)	2.0	1.6	2.7	0.0
Danube Bleak (Chalcalburnus Chalcoides)	1.5	2.6	1.2	0.8
Ide (Leuciscus Idus)	0.2	0.7	0.2	0.0
Totals	1,457.4	1,794.2	2,024.5	1,664.0

Appendix 3: Danube River Fish Production Numbers (metric tons)

2002-2005 Danube River Fish Production (metric tons)				
Fish Species	*2002*	*2003*	*2004*	*2005*
Barbel (Barbus Barbus)	100.0	51.8	44.3	34.4
Carp Bream (Abramis Brama)	24.7	59.8	53.2	30.1
Wels Catfish (Silurus Glanis)	22.0	45.5	39.4	27.2
Common Carp (Cyprinus Carpio)	17.7	32.7	31.5	19.5
Silver Carp (Hypophthalmichthys molitrix)	19.8	28.8	21.5	21.8
Pike Perch (Lucioperca Lucioperca)	17.2	33.4	26.1	14.1
Danube Herring (Caspialosa Pontica)	34.5	11.4	22.0	16.0
Bleak (Alburnus Alburnus)	14.8	29.9	20.9	17.6
Vimba (Vimba Vimba)	12.5	23.8	20.6	19.4
Carp (Carassius Sp)	39.6	15.7	3.5	9.1
Sneep (Chondrostoma Nasus)	15.5	19.5	9.9	17.7
Asp (Aspius Aspius)	14.1	14.7	15.2	16.7
Bighead Carp (Aristichthys nobilis)	13.0	9.1	15.7	20.8
Others	15.2	10.5	15.8	16.5
Grass-Carp (Ctenopharyngodon Idella)	9.0	19.2	12.7	15.2
Great Sturgeon (Huso Huso)	9.9	8.2	9.9	13.2
Roach (Rutilus Rutilus)	2.0	13.4	7.9	6.9
Rudd (Scardinus Erythrophthalmus)	4.0	9.7	8.6	7.3
Ide (Leuciscus Idus)	1.2	13.6	4.5	7.2
Northern Pike (Esox Lucius)	5.0	3.9	2.9	10.5
Danube Bleak (Chalcalburnus Chalcoides)	0.7	9.1	5.5	4.7
Sterlet (Acienser Ruthenus)	2.8	4.5	3.4	4.8
European Perch (Perca Fluviatilis)	1.9	5.8	3.9	1.7
European Chub (Leuciscus Cephalus)	5.0	5.1	0.3	1.6
Burbot (Lota Lota)	5.0	3.0	1.2	0.7
Bream (Abramis Sp.)	1.0	1.7	1.2	3.0
Sturgeon (Acipenser Stellatus)	1.7	1.3	0.5	0.7
Goby (Gobidae)	1.3	1.5	1.0	0.0
Ziege (Pelecus Cultratus)	0.5	0.8	0.6	1.4
Russian Sturgeon (Acipenser Gueldenstaedti)	1.2	1.0	0.5	0.3
Brook Trout (Salvelinus Foutinalis)	0.8	0.0	0.0	0.0
Totals	413.6	488.4	404.2	360.1

Appendix 4: Bulgarian Exports (metric tons)

2003-2006 Destination of Bulgarian Exports by Country (metric tons)				
Country	*2003*	*2004*	*2005*	*2006*
Romania	1,814.2	2,011.4	913.9	677.6
Japan	607.4	1,024.6	744.6	545.2
Turkey	462.0	722.8	422.0	327.1
Germany	356.7	374.8	521.1	535.7
Greece	486.8	323.8	343.4	458.6
Serbia	917.6	310.4	166.9	7.7
Macedonia	322.2	150.0	232.9	614.5
South Korea	145.0	113.5	59.0	610.2
France	128.3	78.6	102.1	184.5
America	0.7	0.2	180.4	111.2
Bosnia	158.8	39.7	37.6	0.0
Great Britain	0.4	0.4	0.2	113.5
Czech Republic	36.0	0.0	42.0	27.9
Sweden	0.0	0.0	0.0	79.4
Norway	0.0	72.8	0.1	0.1
China	0.3	10.4	10.5	23.5
Italy	20.6	0.4	0.3	16.4
Spain	34.9	0.0	0.0	0.0
Netherlands	0.2	16.4	1.0	11.0
Cambodia	25.4	0.1	0.0	0.3
Total	5,548.6	5,277.5	3,851.8	4,413.3

Appendix 5: Bulgarian Exports (USD)

2003-2006 Value of Bulgarian Exports by Country (USD)				
Country	*2003*	*2004*	*2005*	*2006*
Japan	1,894,217	3,849,323	3,291,304	2,671,935
Germany	1,170,378	1,128,754	1,781,810	2,535,969
South Korea	520,586	497,335	296,519	3,029,956
Romania	1,677,991	952,506	728,105	834,907
France	521,614	375,758	1,189,324	1,655,838
Turkey	417,173	709,463	298,893	230,297
America	227,279	88,351	889,032	446,265
Greece	385,320	274,528	283,684	464,197
Macedonia	331,888	239,629	119,022	627,871
Serbia	622,890	189,533	98,207	22,618
Czech Republic	101,821	0	58,136	197,889
Norway	215	279,634	352	3,191
China	2,666	39,375	32,058	100,172
Great Britain	1,895	2,064	1,139	167,368
Sweden	0	0	0	164,460
Netherlands	1,062	135,844	4,540	13,616
Italy	74,432	2,363	1,795	55,913
Bosnia	96,142	15,750	14,877	0
Lichtenstein	0	0	123,933	0
Spain	87,238	0	132	369
Total	8,241,321	8,944,339	9,437,082	13,474,348

Appendix 6: Bulgarian Fish Importers

Fish Producers, Processors and Importers Association BG FISH
Mr. Valeri Baronov, Ch
e-mail: reyafish@abv.bg
Reya Fish Ltd
Cell (359)(899) 881 818
Tel. 359 2 978 4060
Tel/fax 359 2 978 4660
Tel/fax (359)(2) 958 5649
e-mail: bgfish@Bulgaria.com
web: www.bgfish.com

Atlantic
Mr. Ivailo Russinov
3 "Industrial Zone"
Bourgas
Tel. (359)(56) 871 601; 871 602; 871 603 - direct
Fax (359)(56) 840 692
Cell (359)(888) 923 028
e-mail: atlantic@atlantic-group.org; shipping@atlantic-group.org

Electa Co. Ltd
Mrs. Luybov Georgieva
15A "Bratya Georgievich"
9000 Varna
tel./fax (359)(52) 69 11 55
cell (359) 898 645 500
e-mail: electa@mail.bg

Danel 97 Ltd
Mr. Plamen Danchev, Manager
Slatina Commodity Exchange
Tel. (359)(2) 978 8505
Mobile (359) 889 715 112
Fax (359)(2) 973 4194
e-mail: plamendanchev@abv.bg
Mrs. Neli Kunderova, Trade Director
Mobile (359) 887 905 909
e-mail: danel97@yahoo.com

Vi-Venda
Mr.Hristo Djundjurov
Tel. (359)(2) 931 2157
Fax (359)(2) 931 1740
Mobile (359) 888 444314
e-mail: vivenda@mail.bg

Delta Industry
Mr. Mindo Kanchev Stoyanov, Executive Director
22 "Kapitan Petko Voivoda" Str
Sozopol
Tel. 359 550 22420
Tel/fax 359 550 22459
Cell 359 888 206 469
e-mail: deltaind@atlantic-group.org

NESI-5 Ltd
Mr. Krum Drumev, Managing director
2 "Georgi Tringov" Str
Plovdiv 4003
Tel. 359 32 968 100
Fax 359 32 968 104
e-mail: manager@nesi-5.com

Silvex Commerce Ltd
Mrs. Silvia Vladimirova
5 A "Shishman" Str
1000 Sofia
tel. (359)(2) 980 9519; 989 0917
fax (359)(2) 981 5966
mobile: (359) 888 517 991
e-mail: silvex@dir.bg

Diavena Ltd
Mrs. Daniela Jelezcheva, President
Mr. Plamen Gerchev, Trade Manager
Industrial Zone
9700 Shumen
tel. (359) (54) 832 594
tel/ fax (359) (54) 628 71
cell 359 899 943 079
e-mail: plamengerchev@hotmail.com
e-mail: diavena@diavena.com; web: www.diavena.com
web: http://www.diavena.com

Kamarko Ltd
Mr. George Kostadinov
17A “Tintyava” Str
Sofia
Tel. (359)(2) 969 2011
Fax (359)(2) 962 5849
Cell (359) 888 438 368
e-mail: georgek@kamarko.com

Ecomar Ltd.
Mr. Ivaylo Tomov, Manager
Cell 0888 920 428
Sofia 1000,
20-22 William Gladstone St, 6th floor, ap.18
tel: 359 2 981 36 72
fax; 359 2 981 4538
GSM 359 888 920 428
e-mail: ecomar@fastbg.net

Poseidon Frozen Foods Ltd.
Mr. Dimitar Ganev, Manager
Sofia 1574
13, Tzvetan Lazarov St.
Storehouse 202
Tel: 359 2 978 63 66
Fax: 359 2 973 41 84
Mobile: 359 885 551 999
e-mail: poseidonfoods@hotmail.com
e-mail: poseidbs@burgas.prolink.bg

Seafood Ltd
Mr. Venelin Dimitrov, President
51 “Patrirach Eftimii” Str.
Bourgas
Tel. 056 842 395
e-mail seafood@dynasty-bg.com