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Report Highlights:

Bulgaria is a small but growing market for U.S. food and agricultural products. In 2020, total Bulgarian food and agricultural imports were valued at $5.2 billion, of which nearly 1.43 percent, or $73.8 million, were sourced from the United States. During the first eight months of 2021, total food and agricultural imports increased by 21.3 percent over the same period in 2020. Despite Covid-19 and the resulting economic slowdown, U.S. food and agricultural imports grew by five 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 above 3% since 2016, in 2020 GDP fell by 4.2% in the wake of COVID-19. Exports generate 46% 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 2020, Bulgaria ran a $2.73 billion trade deficit in goods. Agriculture makes up 4% of Bulgaria's GDP.

SWOT Analysis	
Strengths	***Weaknesses***
Bulgaria is accessible by sea and has an efficient distribution network. 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 2020, consumer-oriented food imports were $2.87 billion, a 5% increase over 2019.

Food Processing Industry

Bulgarian food processing is developing rapidly and generated $7.4 billion in 2019. Over 6,300 food processors operate in Bulgaria and employ over 100,000 people. 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.

Food Retail Industry

Bulgarian grocery retail sales reached $7.45 billion in 2020. Modern retail sales accounted for $4.32 billion (58%) and $3.13 billion in traditional channel. Total grocery outlets were 41,067. The largest retailer, Kaufland, accounted for nearly 30% 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 for higher quality and products perceived as healthful.

Quick Facts CY 2020

Imports of Consumer-Oriented Products

($ 2.87 billion)

List of Top 10 Growth Products in Host Country

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

Food Industry by Channels ($ billion) 2020

Food Industry (2019)	7.4
Food Exports – Agricultural and Related Products (2020)	6.25
Food Imports – Agricultural and Related Products (2020)	5.18
Retail	7.45
Food Service	2.48

GDP/Population

Population *(millions)*: 6.92

GDP *($ billion)*: 75.3

GDP per capita *($)*: 10,853

Bulgarian National Bank Exchange Rate: $1=BGN 1.594

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

Contact: AgSofia@usda.gov

Market Overview
The Bulgarian National Bank's 2020 average exchange rate of $1.00 =BGN 1.594 was used in this report.

Covid-19
The following report provides full-year data for calendar year 2020. Because data during the ongoing Covid-19 pandemic are still incomplete, Post seeks to provide updated information and developing trends.

After the state of emergency declared by the Government of Bulgaria (GOB) in mid-March 2020 and replaced by an emergency epidemic situation in mid-May 2020, the food processing and retail sectors continued to operate. Consumer trends shifted in favor of staple foods and online purchases, leading to notable declines in high-end and impulse consumption. Despite the initial uncertainty, Bulgaria's grocery retail market quickly adapted by responding to the unusual environment and continued developing in 2020 and 2021, with significant growth in online commerce. Following widespread hotel, restaurant, and institutional (HRI) closures between mid-March and mid-May 2020, HRI sales, particularly for products like beer, meat, spirits, wine, fish and seafood, coffee, beverages, and confectionery dropped. Although the HRI sector enjoyed a strong summer season in 2021, the ongoing pandemic and related measures and uncertainty, as well as the unpredictable winter tourism season, are expected to cause additional harm and extended recovery period.

The European Commission (EC) has lowered its gross domestic product (GDP) growth forecast for Bulgaria in 2021 to 3.8 percent from 4.6 percent predicted in July. The Commission forecasts Bulgaria's GDP to accelerate to 4.1 percent in 2022 and to remain strong at 3.5 percent in 2023.

General Economy
Bulgaria is a market economy and government intervention in international trade and among foreign investors has decreased considerably. Exports generate 45 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	2018	2019	2020
GDP (billion BGN)	109.964	120.395	119.951
GDP (billion USD)	64.31	69.19	75.3
GDP per capita (BGN)	15,653	17,259	17,299
GDP per capita (USD)	9,154	9,919	10,853
Exchange Rate	**$1=BGN 1.71**	**$1=BGN 1.74**	**$1=BGN 1.594**

Source: Bulgarian National Bank

According to Bulgarian National Statistical Institute (NSI) data, the GDP grew by 9.9 percent in the second quarter of 2021 and 4.6 percent in the third quarter of 2021 over the same period in 2020.

According to Intrastat data from the NSI, total 2020 U.S. agricultural imports into Bulgaria reached $73.8 million, up 15 percent over 2019. According to Trade Data Monitor (TDM), which reflects reported Eurostat data, in 2020 the United States imported $219 million of agricultural and related products from Bulgaria. Data indicate 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. As of January 2021, Bulgaria's population totaled 6.92 million people, accounting for 1.4 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., 4,072 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 and link Northern 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. Due to Covid-19 travel restrictions, in 2020 the number of passengers via Sofia airport dropped significantly from 7.1 million in 2019 to 2.9 million in 2020.

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 342,048 people, and Varna on the west coast of the Black Sea, with a population of 332,394 people. As in many other EU countries, Bulgaria's population is aging and nearly 22 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. The average annual salary in Bulgaria is BGN 16,692 (about $10,500), while the average annual pension is BGN 6,450 (about $4,050). The data demonstrate that young people have nearly three times 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 (FTA).
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 (BGN) 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. However, there has been a recent shift toward direct imports to avoid higher cost associated with purchasing from importers or intermediary, but this is still limited. The best method to reach Bulgarian retail buyers and prospective importers is to contact them directly via e-mail or phone. 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.

Post recommends visiting Bulgaria to establish meaningful relationships with local buyers, as Bulgarian stakeholders still value personal relationships and face-to-face meetings. While visiting Bulgaria, U.S. suppliers should bring product samples, 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 further recommends that the companies contact FAS Sofia for guidance when arranging a visit.

Sales and Marketing
Although sales and marketing strategies in Bulgaria are still evolving, it remains a price-sensitive market and discounts are common and often 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 'healthful' or 'nutritious'. Bakery, confectionary, soups, oils and fats, and nutritional supplements are examples of product categories with successful marketing strategies based on health and nutrition.

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 doing business in the country, but U.S. companies are advised to verify the level of English fluency of their potential business partners. Many Bulgarians speak proficient English, especially those under 40. Translation and interpretation services are also easy to find. Written materials, such as company information, product brochures, etc., will resonate better 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 the 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 States (over 70 percent).

Bulgaria's top EU food and agricultural trading partners are Romania, Germany, Greece, Netherlands, Poland, and Italy. Agricultural trade with Romania, Germany, and Greece account for one-third of Bulgaria's total agricultural trade within the EU. Main non-EU food and agricultural trading partners are Turkey, Ukraine, Russia, Serbia, China, and the United States.

Table 3. Bulgaria's Agricultural Export and Import Statistics 2018-2020

International Transactions *Billion EURO*	2018	2019	2020
Exports (FOB)	4.31	4.79	4.79
Imports (CIF)	3.26	3.70	3.99
Commodity Circulation	7.57	8.49	8.78

Source: Ministry of Agriculture and Food – Agrarian Report

Covid-19 Impact: According to TDM data, Bulgarian agricultural and related products exports during the period January - August 2021 increased by 33.5 percent, while the imports grew by 21.3 percent compared to the same period of 2020. Post expects these trends will remain similar through the second half of 2021 following the virus' fourth wave after September, which hit Bulgaria even more severely than the third wave in the spring.

Imports from the United States: According to Intrastat data from the Bulgarian NSI, imports from the United States topped $73.8 million in 2020, up 15 percent over 2019. Bilateral trade relations are friendly and demand for U.S. agricultural exports is stable. According to TDM statistics, U.S. food and agricultural trade to Bulgaria from January to August 2021 grew by over five 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. With ongoing challenges surrounding economic downturn due to the Covid-19 pandemic and further the EU retaliatory tariffs on U.S. agricultural products, 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. For more information about the Bulgarian food processing sector, please refer to FAS Sofia's latest Food Processing Ingredients report.

Covid-19 Impact: Given the upward agricultural trade and the fact that the food processing sector did not suffer serious damage from the pandemic, FAS Sofia expects that it will contract between five and 10 percent and will need six to 12 months to recover from the pandemic, under updated labor, production, and distribution safety protocols.

Food Retail Sector

Total 2020 number of grocery retail outlets in Bulgaria was 41,067, of which 3,332 are modern trade grocery outlets. According to Euromonitor, modern-retail sales in 2020 reached BGN 6.83 billion ($4.32 billion) and accounted for 58 percent of market share. The remaining 42 percent, almost BGN 5.05 billion ($3.13 billion), was held by 37,735 traditional grocery outlets.

Covid-19 Impact: At the beginning of the pandemic in mid-March 2020, the biggest threats to the retail industry were supply uncertainty, responding to a dynamically changed consumer demand landscape, and oversupply. The industry used all its resources to provide all essential goods and avoid shortages while consumers shifted their purchasing habits away from high-end and impulse purchases toward staple foods. Despite the pandemic, Bulgaria's grocery retail market kept developing in 2020 and 2021, with significant growth in online commerce. After the first week of the state of emergency in mid-March 2020, orders for online groceries doubled and retailers looked to quickly increase their capacity. Most of the big food retailers launched own online platforms to respond to the growing demand. By mid-May 2020, there were over 60 online grocery stores, a clear indication that the online retail will continue to grow in the future.

Several retail segments, namely gas stations, excise goods retailers that rely mainly on locations with a large flow of people like airports, subway stations, and malls, as well as tourist areas, suffered losses because of the pandemic measures and reduced consumers' mobility. Aside from the negative effects on the tourism industry, the restrictions on tourism negatively impacted on the grocery retailers on the Black Sea coast.

FAS Sofia expects that in the following years the food retail industry will continue to adapt to the changing environment by responding to demand and expanding their presence on the market. Modern retail is expected to maintain its moderate growth trajectory and traditional retail is forecast to decline in sales and in number of outlets. 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. By March 2020, the foodservice outlets continued to see strong growth due to improving consumer purchasing power and tourism. For more information about the Bulgarian HRI food sectors, please see Post's latest HRI report.

Covid-19 Impact: Bulgaria's HRI foodservice industry grew year-on-year until early 2020. However, the industry was the most severely hit by the Covid-19 pandemic. Since mid-March 2020, food service sales at restaurants and hotels have dropped significantly as the outlets have closed, tourism has halted, and public outings have been reduced. In 2020, HRI sales hit unprecedented lows, down nearly 40 percent over 2019. Nearly 44 percent of restaurants, bars, and entertainment outlets froze operations and were forced to lay off staff following the state of emergency declaration from March 13 to May 13. After the state of emergency measures eased in latter half of May and in the summer, over 70 percent of those businesses resumed operations with reduced capacity. On November 27, 2020, the GOB introduced a second partial lockdown, which forced all restaurants, bars, and entertainment establishments to close, with the exception of food delivery. The HRI sectors reacted strongly against this measure and argued that a large percentage of them would likely be forced to close permanently.

The GOB introduced a tax relief measure to help the food service industry, valid from July 1, 2020 until December 31, 2021. Bulgaria's value added tax (VAT) was reduced from 20 percent to nine percent for restaurant and catering services (alcoholic beverages were excluded from this measure). In late November 2021, the industry requested an extension of this measure.

In 2021, Bulgaria's HRI and tourism enjoyed a strong summer season and registered up to 50 percent growth for the period January – August 2021 over the same period in 2020. However, the results are still nearly 40 percent lower than in pre-pandemic years. The status of upcoming winter tourism season is still unclear as it depends on the development of the pandemic and the imposed measures, but the GOB is working with industry groups on various actions to keep industry stakeholders afloat.

FAS Sofia expects that Bulgaria's HRI industry will need 18 to 24 months after the Covid-19 pandemic to fully recover.

Organic Foods Sector

Bulgarian consumer demand for organic foods and beverages has grown in recent years due to economic stability, improved purchasing power, and increased popularity for products perceived as healthful. In 2020, the Bulgarian organics market was valued at about $38 million, with growing sales of packaged foods and beverages, but declining sales of fresh produce due to pandemic-related farmers markets closures. Demand growth is expected to increase in 2022 due to favorable consumer trends and better prospects for HRI sectors. Certification, compliance, and domestic support for organic farmers remain as policy priorities for the Government of Bulgaria

Imported organic, high-value consumer products dominated with estimated over 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

Following widespread HRI closures between mid-March and mid-May, in December 2020, and the continuing uncertainty in 2021, HRI sales for products like beer, meat, distilled spirits, wine, fish and seafood, coffee, beverages, and confectionery dropped. Some U.S. exporters will likely experience short- to medium-term drops in demand among importers of these and other high-end products. FAS Sofia remains optimistic that demand will eventually rebound and return to pre-Covid trends.

Table 4. Best Consumer Oriented Product Prospects

Product	2020 Imports ($ millions)	Import Tariff Rate	Constraints over Market Development	Market Attractiveness for U.S.
Grape Wines	33.28	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 account for about 10 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 2008 and HS 1202)	92.43	From 0 to 25 percent depending on type. Tree nuts information is available in the EU official Journal.	Greece, Ukraine, and Turkey for tree nuts and 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)	113.71	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)	141.16	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	39.63	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 remains moderate. Positive perception about U.S. beef should be created by educating the main buyers (restaurants, hotels, and retailers) about its quality and diversified tastes.
Fish Products	114.32	EU seafood tariffs range from zero to 22 percent. More detailed information on seafood tariffs can be found in the official EU Journal in pages 47-69 and 134-139.	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, China, Norway, Vietnam. See here for more information.

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 in Sofia.

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Attachments:

No Attachments.