USDA United States Department of Agriculture
Foreign Agricultural Service

GAIN Global Agricultural Information Network

Voluntary Report – Voluntary - Public Distribution **Date:** April 16, 2024

Report Number: BU2024-0003

Report Name: Fish and Seafood Market Brief Bulgaria

Country: Bulgaria

Post: Sofia

Report Category: Fishery Products, Market Development Reports

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Report Highlights:

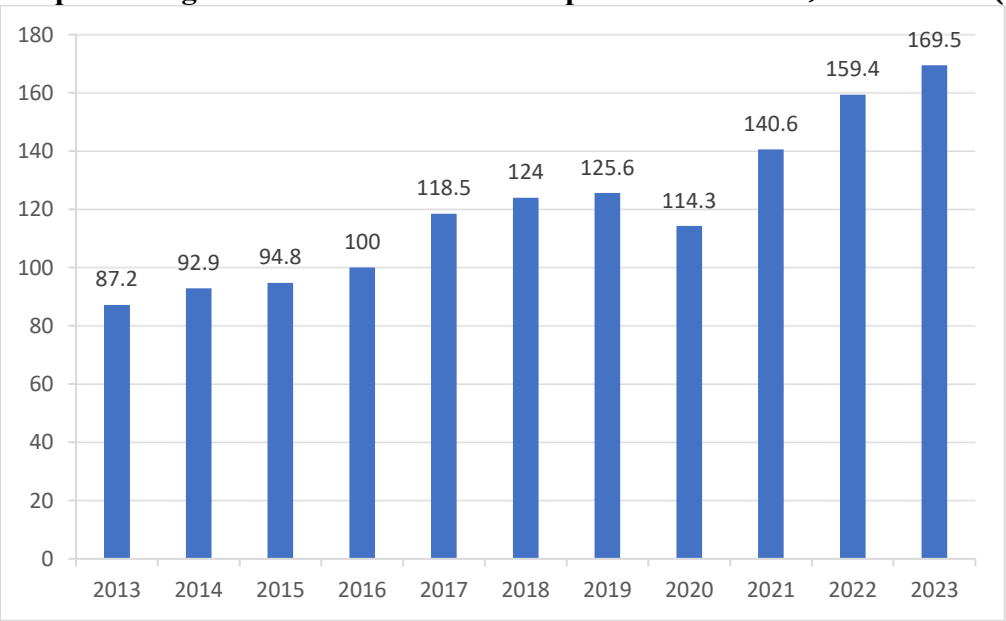
Bulgaria's fish and seafood imports have grown steadily over the past decade and have nearly doubled. Bulgarian fish and seafood importers are seeking to expand the variety of fish available to consumers, particularly among the mid and high-value categories. In 2023 Bulgaria imported a record $169.5 million in fish and seafood products, up six percent from 2022. Imports from the United States consisted mainly of live lobsters, Alaska pollock, and products of fish or crustaceans, molluscs, or other aquatic invertebrates. The foodservice sector, which was severely hit by the COVID-19 pandemic, is an important driver of fish and seafood demand growth in Bulgaria. Bulgaria's per capita fish and seafood consumption is still below the EU average.

General Information:

Imports of Fish and Seafood Products

According to Trade Data Monitor (TDM), which reflects reported Eurostat data, Bulgaria's imports of fish and seafood products have grown steadily over the past 10 years, with the only exception being in COVID-19 pandemic-impacted 2020. Over the last decade imports have nearly doubled to $169.5 million in 2023 compared to $87.2 million in 2013. This upward trend clearly indicates that Bulgaria's fish and seafood market is developing with growing demand and diversification of species.

Graph 1: Bulgaria's Fish and Seafood Imports from World, 2013 – 2023 (Million $)



Source: Trade Data Monitor

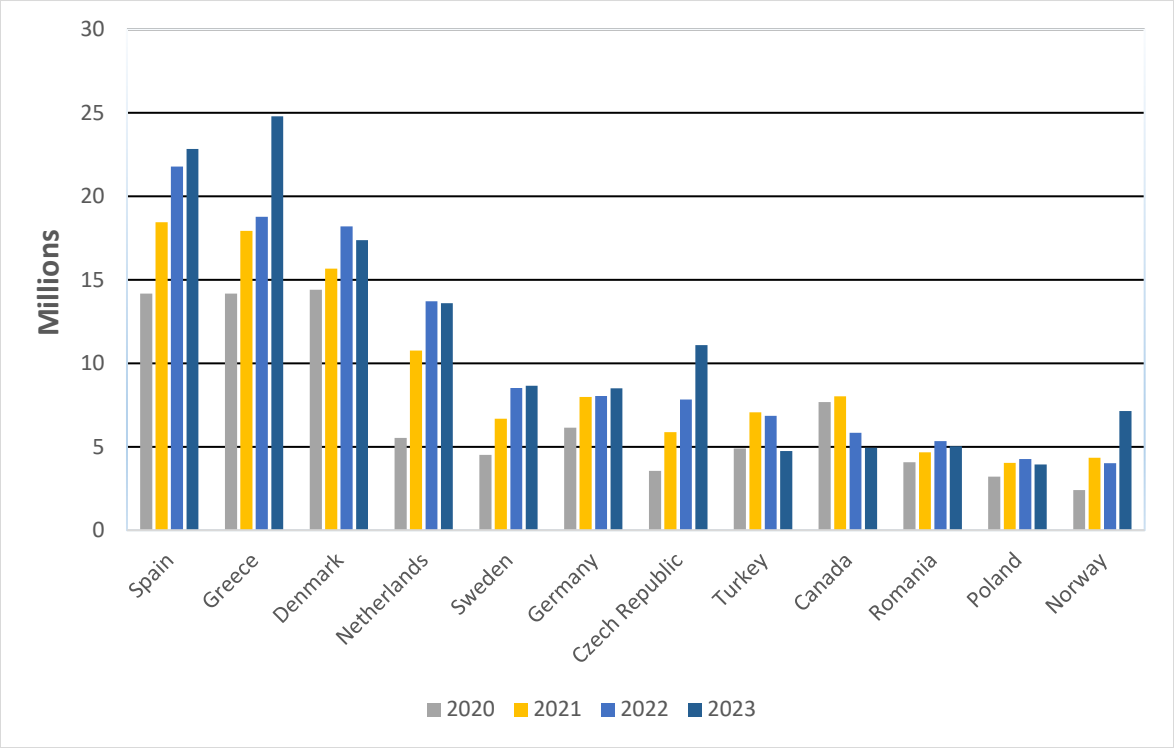
Total imports of fish and fishery products in Bulgaria in 2023 reached a record of $169.5 million, a 6.3 percent increase over 2022 due to decreased domestic catch/production and growing market demand for imported species such as Pacific salmon, tuna, seabass, live fish, Atlantic salmon, caviar, and other products. Imports of fresh and chilled fish, aquatic invertebrates, and molluscs also increased.

Nearly 80 percent ($132.3 million) of imported fish in 2023 came from other EU countries. 2023 imports mainly came from Spain ($22.8 million), Greece ($24.8 million), Denmark ($17.4 million), Netherlands ($13.6 million), Czech Republic ($11.1 million), Sweden ($8.7 million), Germany ($8.5 million), Romania ($5 million), and Poland ($3.9 million). Main non-EU trading partners were Norway ($7.1 million), Canada ($4.9 million), Turkey ($4.7 million), China ($3.7 million), Vietnam ($2.5 million), Argentina ($2.5 million), Morocco ($2.5 million), Iceland ($1.6 million), and Chile ($1.3 million).

Although Norway, Iceland, and Liechtenstein are not EU member states, they are members of the European Economic Area (EEA) which allows them to be a part of the EU's single market. The EEA

Agreement provides for the inclusion of EU legislation covering the four freedoms — the free movement of goods, services, persons, and capital — throughout the 30 EEA States.

Graph 2: Top EU and Non-EU Fish and Seafood Exporters to Bulgaria, 2020-2023 (Million $)



Source: Trade Data Monitor

As in previous years, in 2023 imports by species were dominated by shrimp and prawns (18.3 million) and frozen mackerel ($15.4 million). Due to a lack of mackerel in Bulgaria, the frozen mackerel imports satisfy market demand for direct consumption and that of the processing industry.

Imports in 2023 of the following species were relatively large: Pacific salmon ($10.9 million), tuna ($8.6 million), seabass ($7.7 million), seabream ($7.4 million), frozen lulas and sepias ($4.9 million), hake – frozen and fillets ($5.9 million), Atlantic salmon ($5.5 million), cod ($5.3 million), live fish ($4.6 million), trout ($4.3 million), and other products.

Bulgarian imports in 2023 of fish and seafood from the United States slightly decreased by 4.3 percent over 2022 and mainly consisted of live lobsters, Alaska pollock, and products of fish or crustaceans, molluscs, or other aquatic invertebrates.

Table 1: Top Fish and Seafood Product Imports by Species, 2022 – 2023 (Million $)

Species	2022	2023	Change 2022/2023
Shrimps and prawns (cold water and frozen)	18.6	18.3	-1.7%
Mackerel	16.6	15.4	-7.5%
Pacific salmon	9.9	10.9	10.5%
Tunas	7.6	8.6	13.2%
Seabass	6.4	7.7	20.8%
Seabream	7.5	7.4	-1.6%
Frozen fish nesoi (not elsewhere specified or included)	7.0	6.7	-3.4%
Prepared fish, nesoi	5.3	6.0	12.5%
Frozen lulas and sepias	4.85	4.87	0.5%
Frozen shrimps and prawns	4.6	4.7	2.7%
Hake (frozen and filets)	6.6	5.9	12.7%
Atlantic salmon	4.4	5.5	25.35%
Cod	3.7	5.3	41%
Live fish	2.4	4.6	94.5%
Trout	3.7	5.3	41%

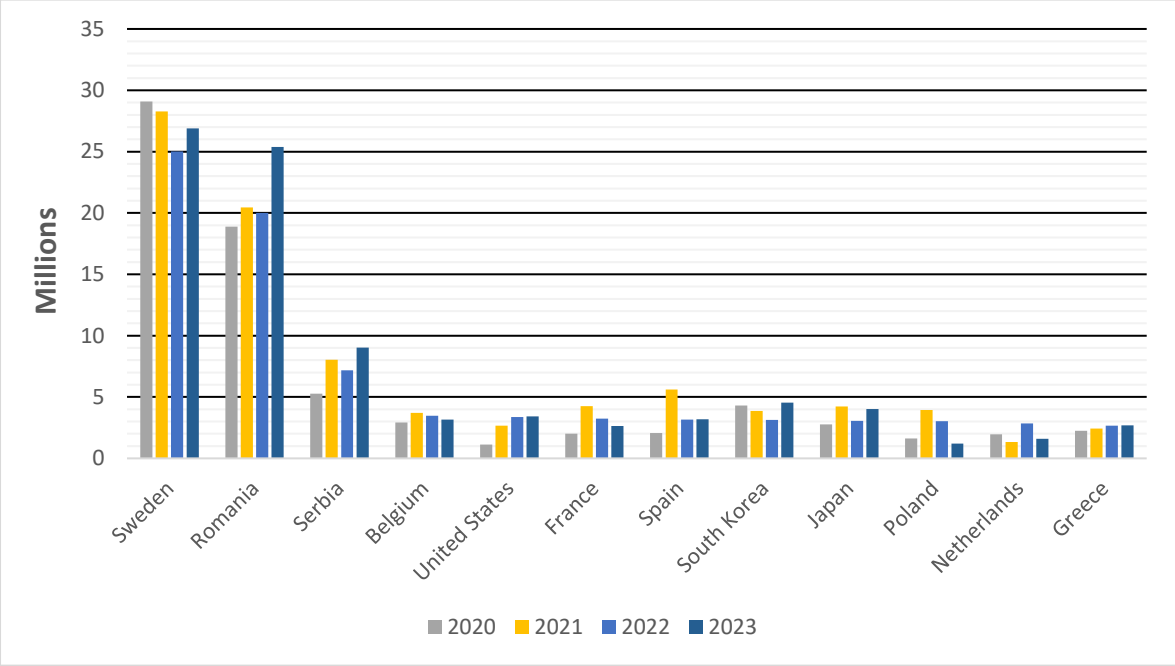
Source: Trade Data Monitor

Exports of Fish and Seafood Products

Total 2023 Bulgarian exports of fish and seafood products reached $98.9 million, an increase of 8.5 percent over 2022. Within the EU, exports slightly grew by four percent to $73.5 million, 74 percent of total exports in 2023. Primary EU markets were Sweden ($26.9 million), Romania ($25.4 million), Germany ($3.3 million), Spain ($3.2 million), Belgium (3.1 million). 2023 exports to non-EU markets increased by 24 percent to $25.4 million and were mainly to Serbia ($9 million), Republic of Korea ($4.5 million), Japan ($4 million), United States ($3.4 million), and Bosnia and Herzegovina ($1.4 million).

In 2023, the most notable increases in exports were those of trout (1,238 percent), fish fillets, fresh or chilled (946 percent), seabream (243 percent), live carp (121 percent), caviar (108 percent), sockeye salmon (89 percent), crabs (70 percent), sardines (66 percent), and tuna (50 percent). In the case of other types of fish products, there was a contraction of exported quantities, the most notable of which were those of mackerel (-29 percent) and tilapia (-27 percent).

Graph 3: Top EU and Non-EU Fish and Seafood Importers from Bulgaria, 2020-2023 (Million $)



Source: Trade Data Monitor

Table 2: Top Fish and Seafood Product Exports by Species, 2022 – 2023 (Million $)

Species	2022	2023	Change 2022/2023
Shrimps and prawns, prepared or preserved	21.7	22.2	2.5%
Cod	4.4	6.2	39.1%
Caviar	2.8	5.7	108%
Mackerel	6.8	4.8	-29%
Trout	2.6	3.5	33%
Smoked Pacific salmon	3.0	3.0	0%
Fish, prepared or preserved, nesoi	3.6	3.0	-17%
Anchovies, prepared or preserved	2.3	2.9	27%
Atlantic salmon	2.3	2.8	24%
Tunas	1.8	2.6	50%
Trout	0.2	2.4	1,238%
Sardines	0.7	2.2	200%
Fish fillets, dried, salted or in brine, but not smoked, nesoi	1.8	2.1	20%
Seabream	0.6	2.1	243%
Molluscs, prepared or preserved, nesoi	1.7	2.0	21%

Source: Trade Data Monitor

Foodservice Industry

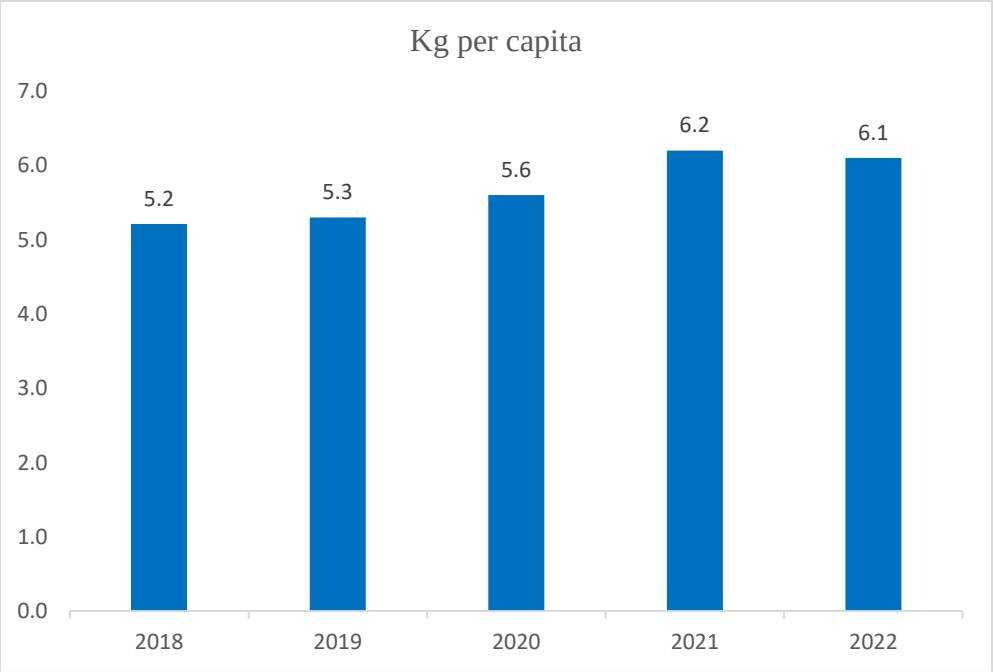
Bulgaria's Hotel, Restaurant, and Institutional (HRI) foodservice industry is a significant driver of fish consumption. This sector grew steadily year-on-year until early 2020, when it was hit by the COVID-19 pandemic. Food service sales decreased significantly as the outlets closed, tourism was halted, and HRI sales dropped by over 40 percent compared to 2019. This significantly decreased demand for fish and seafood products as well, as restaurants account for nearly half of the consumption. However, in 2023, Bulgaria's HRI and tourism enjoyed strong summer and winter tourist seasons and reached pre-pandemic tourism levels. The food service operators at the resorts are expected to recover from the losses from the pandemic years.

Bulgarian consumers do not typically eat many fish and seafood products at home, with annual at-home consumption (not including restaurants) slightly above six kilograms per capita, significantly lower than the average EU consumption of about 24 kilograms per capita. However, there are good opportunities for U.S. suppliers in the HRI sector. An increasing number of international suppliers look to the Bulgarian HRI sector as progressively more attractive outlets for seafood sales.

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

Consumption

Graph 4. Fish and Seafood Per Capita Consumption, 2018 – 2022 (kg)



Source: Bulgarian NSI, (Note: does not include restaurant consumption)

Per capita fish consumption in Bulgaria is below the EU average. According to data from the NSI, per capita household fish consumption in 2022 was almost the same as in 2021 at 6.1 kg. However, this

number does not include restaurant consumption. Cumulative consumption per capita, including consumption in restaurants, is estimated at almost double. The consumption level grew slightly in the last four years and the forecast is that it will remain stable with a slight growth, due to rising consumer incomes and the growing demand for healthier food, despite increasing wholesale and retail prices for fish and fishery products.

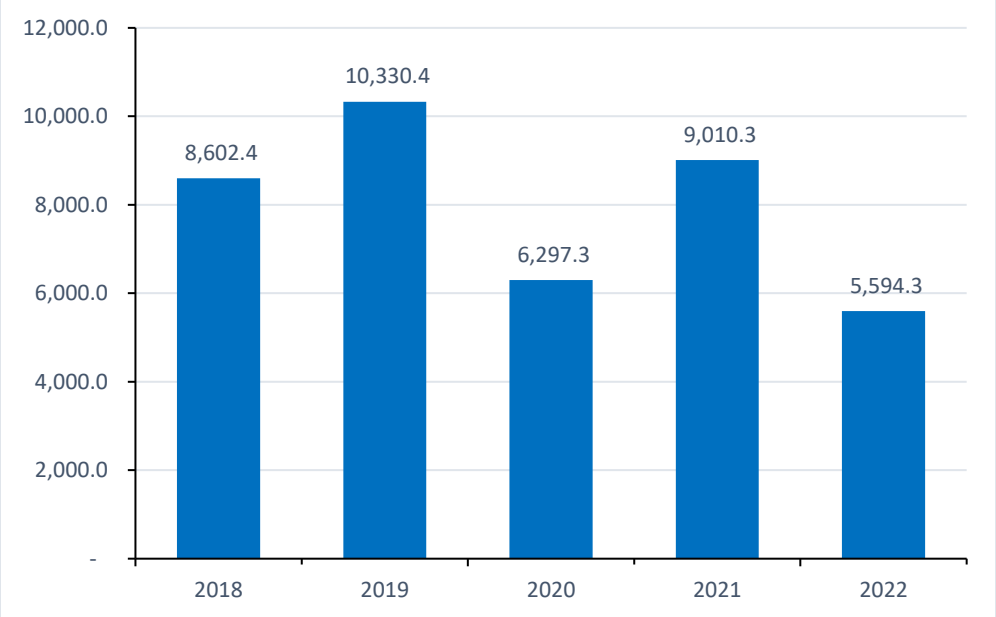
Domestic Production

In 2022, the domestic catch of fish and other aquatic organisms dropped by 38 percent as compared to 2021. The main reason for this decrease was the reduction in the catch of fish and other aquatic organisms in the Black Sea. The economic condition of the fleet worsened significantly due to the war in Ukraine which threatened the security of fishing operations and resulted in revenue losses and supply chain disruptions. Although full data is not yet available for 2023, data from the first five months indicated another decline in catch, down 17 percent from the same period in 2022. The lower catch in recent years has been one of the reasons for stronger import demand.

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

According to official statistics, the total 2022 domestic catch decreased to 5,594 metric tons (MT) from 9,010 MT in 2021. Of this amount, 5,546 MT was harvested from the Black Sea and 48 MT from the Danube River.

Graph 5: Total Catch, Bulgarian Fish and Seafood, 2018 – 2022 (MT)



Source: Bulgarian Executive Agency for Fisheries and Aquaculture

Table 3. Bulgarian Fish and Seafood Production 2022 (MT)

Description	Quantity
Fish fillets and other fish meat (whether or not minced), fresh or chilled	1,339
Fish livers and roes, fresh or chilled	26.2
Fish, frozen	4,877.7
Fish fillets, frozen	1,675.8
Fish, dried, whether or not salted, or in brine	524.3
Fish, otherwise prepared or preserved, except prepared fish dishes	6,849.3
Caviar and caviar substitutes	129.3
Mollusks, frozen, dried, salted or in brine	582.2
Other aquatic invertebrates and seaweed, frozen, dried, salted or in brine	414.2
Crustaceans, mollusks and other aquatic invertebrates and seaweed, otherwise prepared or preserved	1,689.3
Other inedible products of fish, crustaceans, mollusks or other aquatic invertebrates	404.5

Source: Bulgarian National Statistical Institute

Black Sea Fisheries

Bulgaria's fishing industry is fragmented along its 240 miles of coastline. The Bulgarian fishing fleet is rather small, with about 2,000 vessels. In 2022, the Black Sea catch decreased by 38 percent over 2021. About 28 percent of all catch was European sprat, followed by blue fish (9 percent), Black Sea horse mackerel (4 percent), anchovy (3 percent), red mullet (3 percent), turbot, and goby. Conch traditionally accounts for the highest percentage of the Black Sea shellfish catch with about 39 percent of all Black Sea catch. In 2022, the conch catch was 2,165 MT, less than one percent decrease from 2021. The soft-shell clam catch was 337 MT, more than a double drop from 2021.

Table 4. Black Sea Catch by Species

Species	MT		Change 2021/2022
	2021	**2022**	
European Sprat	3,479	1,561	-55%
Shellfish (Conch, Mussel, Clam, Shrimp)	3,024	2,727	-10%
Anchovy	1,176.7	153.00	-87%
Red Mullet	445.4	181	-59%
Bluefish	302.1	513.2	70%
Black Sea Horse Mackerel	274.1	194.5	-29%
Turbot	70.4	54.9	-22%
Goby	32.4	17.3	-47%
Spiny Dogfish	19.7	17.2	-13%
Other species	96.6	127.4	32%
Total Black Sea Catch	**8,920.4**	**5,546.50**	**-38%**

Source: Bulgarian Executive Agency for Fisheries and Aquaculture

Freshwater Fisheries
Bulgaria has over 200,000 HA of lakes, reservoirs, and rivers, which account for 1.8 percent of its total territory. The longest rivers are the Danube (470 km), followed by the Iskar (368 km), Maritsa (321 km), and the Kamchia (245 km). Over 400 lakes cover more than 10,000 HA in total area. Bulgaria's 2012 Law on Fisheries and Aquaculture banned commercial fishing within in-land water basins.

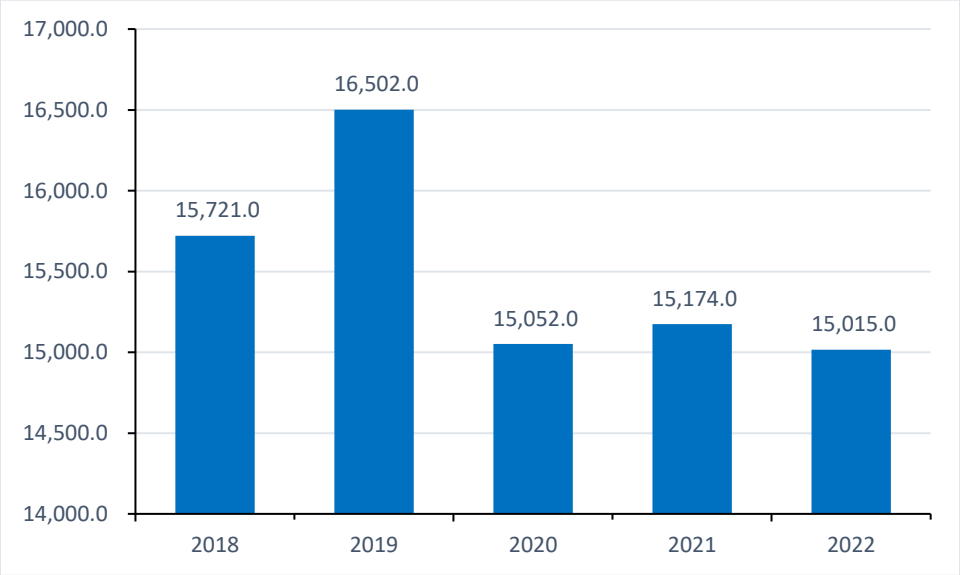
The commercial catch from the Danube River in 2022 was 48 MT, a nearly 46 percent decrease from 2021. The Danube catch in 2022 consisted mainly of Prussian carp (21 percent), carp (14 percent), common barbel (11 percent), common bream (9 percent), Wels catfish (8 percent), bighead carp (7 percent), common carp (7 percent), zander (5 percent), and others.

In 2012, the Ministry of Agriculture and Food banned fishing, transporting, and the sale of sturgeon and product derived from sturgeon. The ban aims to protect and preserve the Danube's sturgeon population as it is considered as one of the most endangered species. In 2020, the ban was extended for another five years.

Aquaculture
Total 2022 aquaculture production (breeding material, fish, and seafood) decreased by one percent over the previous year (15,015 MT) and is still lower than the pre-pandemic years. Total 2022 production of breeding material increased by 10 percent to 2,416 MT.

In 2022, the total capture of aquaculture fish (12,599 MT), down 2.8 percent from 2021, was mostly rainbow trout, carp, and bighead carp. Black mussel capture decreased by 5.9 percent to 2,422 MT.

Graph 6: Total Capture Fisheries Production, 2018 – 2022 (MT)



Source: Bulgarian Executive Agency for Fisheries and Aquaculture

Production of other local species is insignificant and is mainly grass carp, Prussian carp, African sharp tooth catfish, and common carp. Recently, diversification of the produced species has included sturgeon species. In 2022, the production of Russian sturgeon increased nearly seven-fold from 89 MT to 597 MT. The main marine aquaculture species is black mussel.

According to the Ministry of Agriculture and Food and the Bulgarian Executive Agency for Fisheries and Aquaculture (BEAFA), as of the end 2022 there are 714 active aquaculture farms in Bulgaria, of which 692 for fresh water and 22 for salt water aquaculture. The number of aquaculture businesses is likely to remain stable in the future, as new and modern production facilities are established under the EU Fishery Program, as well as the expansion and modernization of existing businesses.

Labeling
EU legislation requires that all products, including seafood, offered for retail sale in the EU be properly labeled. The EU's Publications Office issued a pocket guide to the new fish and aquaculture consumer labels. It explains what must appear on the labels and what additional information can be displayed. The pocket guide can be accessed through this link.

Import Tariffs
All EU Member States apply the same tariff on goods imported from outside the EU. The import duty rate is determined by the classification of a good in the EU Tariff Schedule (last update published in Official Journal L 312 – October 31, 2014) and by the customs value. For the customs classification of goods, the EU uses the Combined Nomenclature established by Council Regulation 2658/87. This eight-digit coding system is based on the Harmonized System, which is also the basis for the import and export codes used by the United States. The full list of fish and seafood products duties can be found in Chapter 3 (page 55-78) here. More information about the Combined Nomenclature can be found here.

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

Bulgarian Fish and Seafood Importers
Contact the FAS Sofia for an updated list of fish and seafood importers.

FAS Sofia's Contact Information:
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Attachments:

No Attachments.