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Report Highlights:

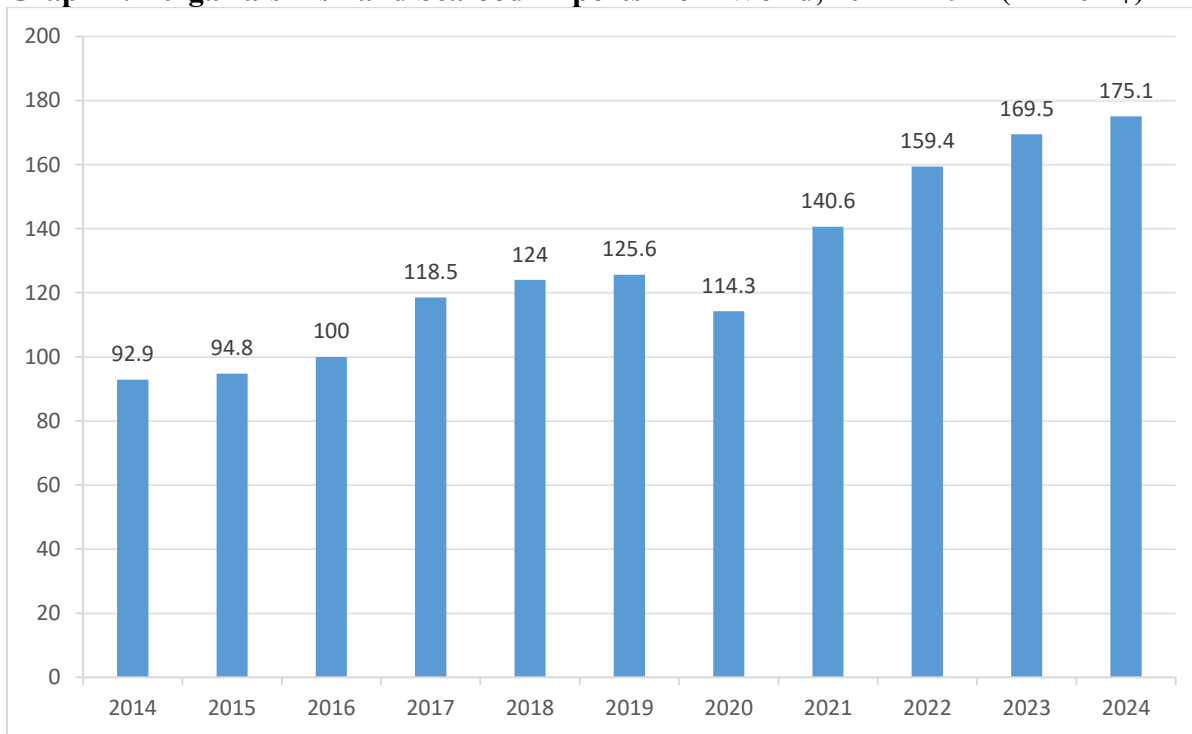
Bulgaria's fish and seafood imports have grown steadily over the past decade, nearly doubling in value over this period. Bulgarian importers are seeking to expand the variety of fish available to consumers, particularly in the mid and high-value categories. In 2024, Bulgaria imported a record \$175.1 million in fish and seafood products, marking a three percent increase from 2023. The foodservice sector is a significant driver of fish and seafood demand growth in Bulgaria. Despite this growth, Bulgaria's per capita fish and seafood consumption remains below the EU average. Continued demand growth can present new opportunities for U.S. exporters of fish and seafood products.

General Information:

Import 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 the COVID-19 pandemic-impacted year of 2020. Over the last decade, imports have nearly doubled, reaching \$175.1 million in 2024 compared to \$92.9 million in 2014. 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, 2014 – 2024 (Million \$)



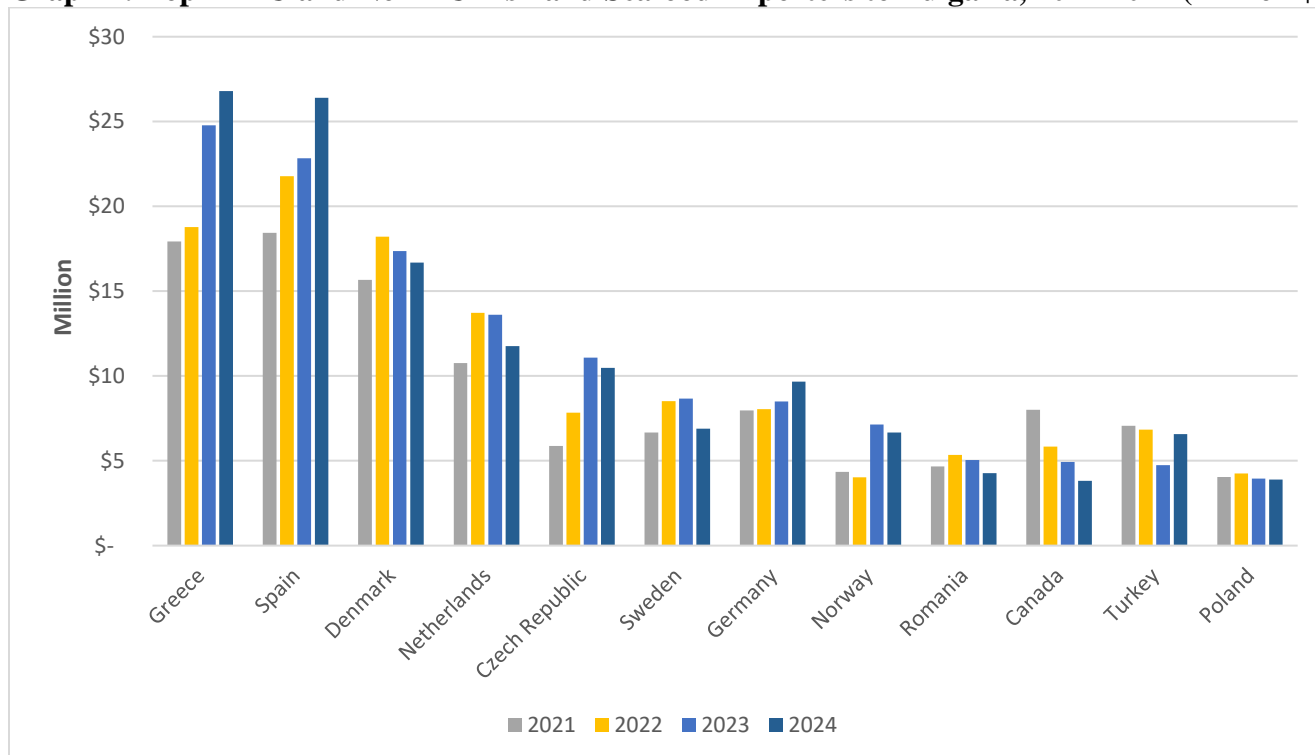
Source: Trade Data Monitor

Total imports of fish and fishery products in Bulgaria in 2024 reached a record of \$175.1 million, a 3.3 percent increase over 2023 due to insufficient domestic catch/production and growing market demand for imported species such as mackerel, Pacific salmon, tuna, seabass, live fish, Atlantic salmon, hake, herring, and other products. Imports of frozen squid and sepias also increased.

More than 77 percent (\$135.1 million) of imported fish in 2024 came from other EU countries. 2024 imports mainly came from Greece (\$26.8 million), Spain (\$26.4 million), Denmark (\$16.7 million), Netherlands (\$11.8 million), Czech Republic (\$10.5 million), Germany (\$9.7 million), Sweden (\$6.9 million), Romania (\$4.3 million), and Poland (\$3.9 million). Main non-EU trading partners were Norway (\$6.7 million), Turkey (\$6.6 million), Morocco (\$3.9 million), Canada (\$3.8 million), Vietnam (\$3.5 million), China (\$2.8 million), Argentina (\$2.7 million), Faroe Islands (\$1.4 million), Indonesia (\$1.3 million), New Zealand (\$1.3 million), and Iceland (\$1.1 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 12 EU and Non-EU Fish and Seafood Exporters to Bulgaria, 2021-2024 (Million \$)



Source: Trade Data Monitor

Table 1: Top 10 Fish and Seafood Product Imports by Species, 2023 – 2024 (Million \$)

Specie/HS Code	2023	2024	Change
			2023/2024
Mackerel/030354	15.4	18.6	20.8%
Shrimps and prawns (cold water and frozen)/030616; 030617	18.3	16.9	-7.7%
Pacific salmon/030441	10.9	11.7	7.3%
Seabass/030284	7.7	10	29.9%
Tunas/160414	8.6	9.6	11.6%
Frozen fish nesoi (not elsewhere specified or included)/030389	6.7	7.8	16.4%
Seabream	7.4	7	-5.4%
Atlantic salmon/030214	5.5	6.8	23.6%
Frozen lulas and sepias/030743	4.9	6.8	38.8%
Live fish, nesoi/030199	4.6	5.4	17.4%

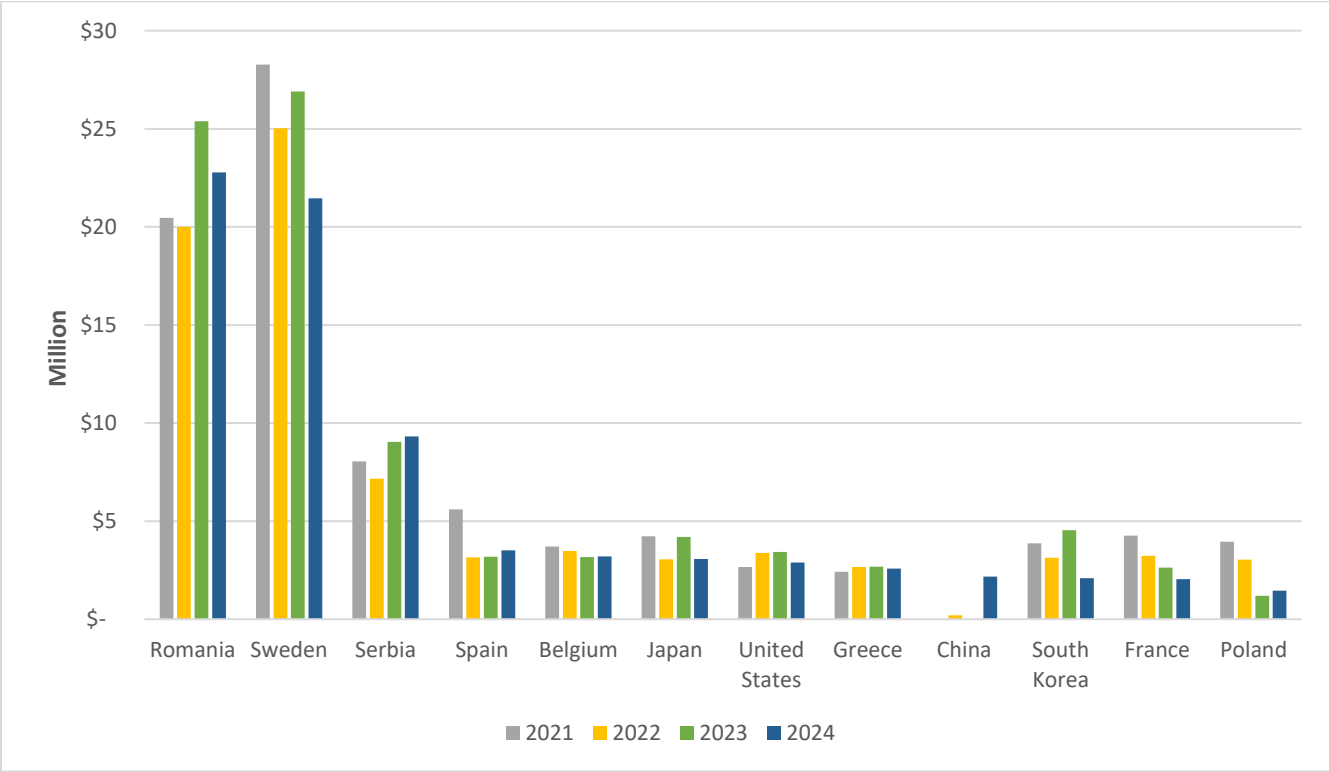
Source: Trade Data Monitor

In 2024, imports by species were dominated by frozen mackerel (\$18.6 million) and shrimp and prawns (\$16.9 million). Due to a lack of mackerel in Bulgaria, the frozen mackerel imports satisfy market demand both for direct consumption and that of the processing industry. 2024 imports of the following species were also relatively large: seabass, Atlantic salmon, Pacific salmon, tunas, seabream, frozen lulas/squid and sepias, and other products.

Exports of Fish and Seafood Products

Total 2024 Bulgarian exports of fish and seafood products reached \$86.6 million, a decrease of 13 percent from 2023. Within the EU, exports also declined by 16 percent to \$61.5 million, 71 percent of total exports in 2024. Primary EU markets were Romania (\$22.8 million), Sweden (\$21.5 million), Spain (\$3.5 million), Belgium (3.2 million), and Greece (\$2.6 million). 2024 exports to non-EU markets slightly decreased by 1.3 percent to \$25 million and were mainly to Serbia (\$9.3 million), Japan (\$3 million), United States (\$2.9 million), China (\$2.2 million), Republic of Korea (\$2.1 million), and the United Kingdom (\$1 million).

Graph 3: Top 12 EU and Non-EU Fish and Seafood Importers from Bulgaria, 2021-2024 (Million \$)



Source: Trade Data Monitor

In 2024, the most notable increases in exports were those of prepared or preserved mollusks (45 percent), fresh and chilled trout (20.8 percent), and live trout (17.1 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 other frozen mollusks (-27.7 percent), caviar (-19.3 percent), shrimps and prawns (-12.6 percent), and smoked Pacific salmon (-10 percent).

Table 2: Top 10 Fish and Seafood Product Exports by Specie, 2023 – 2024 (Million \$)

Specie/HS Code	2023	2024	Change
			2023/2024
Shrimps and prawns, prepared or preserved/160529; 160521	22.2	19.4	-12.6%
Other mollusks, frozen/030792	6.5	4.7	-27.7%
Caviar/160431	5.7	4.6	-19.3%
Trout, live/030191	3.5	4.1	17.1%
Fish, prepared or preserved, nesoi/160420	3.0	3.2	6.7%
Mollusks, prepared or preserved, nesoi/160559	2	2.9	45%
Trout, fresh or chilled/030211	2.4	2.9	20.8%
Atlantic salmon and Danube salmon/030214	2.83	2.77	-2.1%
Smoked Pacific salmon/030541	3	2.7	-10%
Tunas/160414	2.6	2.7	3.8%

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 severely impacted by the COVID-19 pandemic. Foodservice sales decreased significantly as outlets closed, tourism was halted, and HRI sales dropped by over 40 percent compared to 2019. This led to a substantial decrease in demand for fish and seafood products, as restaurants account for nearly half of the consumption. However, in 2023 Bulgaria's HRI and tourism sectors enjoyed strong summer and winter tourist seasons, reaching pre-pandemic tourism levels. Data for the 2024 summer season shows a three percent increase over the summer of 2023. Although the 2024 winter season has not yet concluded, preliminary data indicates an increase of nearly four percent over 2023.

The major challenges faced by Bulgaria's HRI industry in 2023 and 2024 included the war in Ukraine, increased prices due to high inflation in 2022, relatively low but growing consumer purchasing power, and supply chain disturbances. FAS Sofia expects the industry to sustain a moderate-paced upward trend.

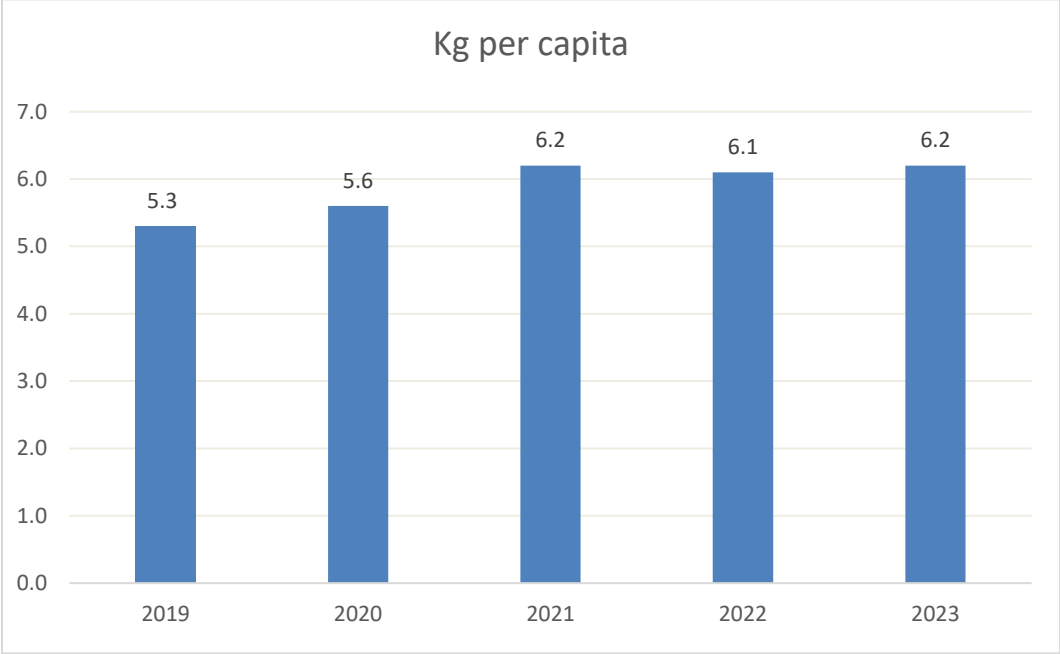
The HRI and food retail sectors will continue to influence and educate consumers on fish varieties, positive characteristics, and health benefits. For traditional species in Bulgaria, prices depend on the catch size and domestic aquaculture production, while prices for imported species are mainly determined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

Consumption

According to data from the NSI, per capita household fish consumption in Bulgaria in 2023 was at 6.2 kg, slightly above the 2022 level. However, this figure does not include restaurant consumption, and when including this data cumulative per capita consumption is estimated to be almost double that level. Nevertheless, it still remains at only half of the average EU consumption of about 24 kg per capita. Consumption levels have grown slightly over the last four years, and forecasts suggests they will remain stable with slight growth. This is attributed to rising consumer incomes and the growing demand for healthier food, despite increasing wholesale and retail prices for fish and fishery products.

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.

Graph 4. Fish and Seafood Per Capita Consumption, 2019 – 2023 (kg)



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

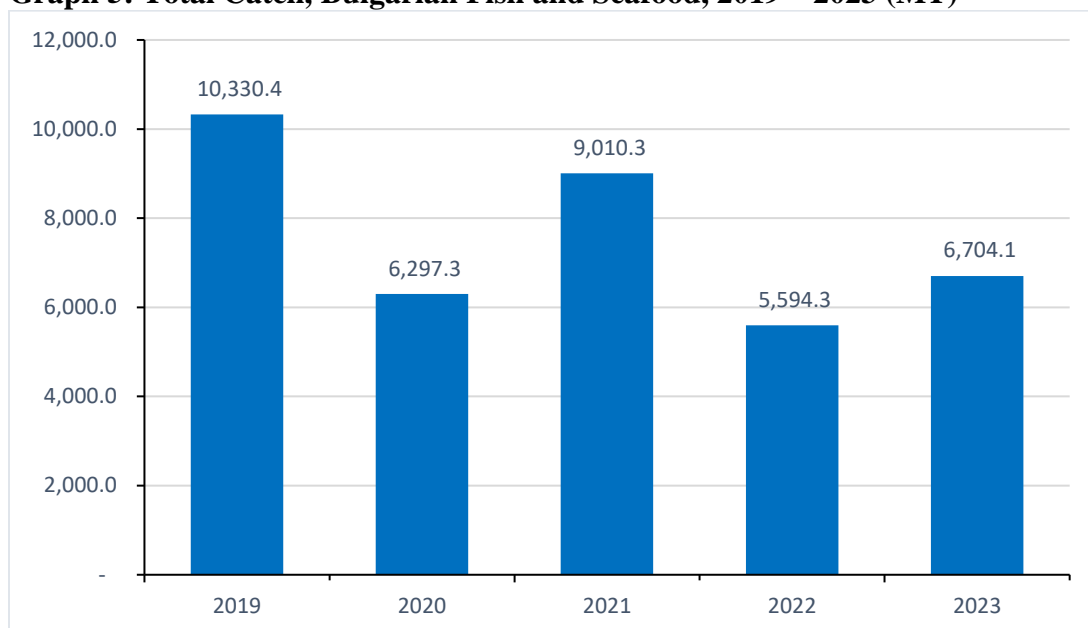
Domestic Production

Remark: As of the preparation of this report, data for the year 2024 is not yet available. The analysis and conclusions presented herein are based on the most recent data for 2023.

In 2023 the domestic catch of fish and other aquatic organisms grew by 19.8 percent compared to 2022. The main reason was an increase in the catch of fish and other aquatic organisms in the Black Sea. The lower catch in recent years has been one of the reasons for stronger import demand.

According to official statistics, the total 2023 domestic catch increased to 6,704 metric tons (MT) from 5,594 MT in 2022. 6,667 MT was harvested from the Black Sea and 37 MT from the Danube River.

Graph 5: Total Catch, Bulgarian Fish and Seafood, 2019 – 2023 (MT)



Source: Bulgarian Executive Agency for Fisheries and Aquaculture

Table 3. Bulgarian Fish and Seafood Production 2023 (MT)

Description	Quantity
Fish fillets and other fish meat (whether or not minced), fresh or chilled	1,930
Fish, frozen	6,243
Fish fillets, frozen	1,821
Fish, dried, whether or not salted, or in brine	635
Fish, including fillets, smoked	2,169
Fish, otherwise prepared or preserved, except prepared fish dishes	8,429
Caviar and caviar substitutes	191
Mollusks, frozen, dried, salted or in brine	1,491
Other aquatic invertebrates and seaweed, frozen, dried, salted or in brine	403
Crustaceans, mollusks and other aquatic invertebrates and seaweed, otherwise prepared or preserved	1,720
Other inedible products of fish, crustaceans, mollusks or other aquatic invertebrates or seaweed	409

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 less than [1,800](#) vessels. In 2023, the Black Sea catch increased by 20 percent over 2022. About 49 percent of all catch was European sprat, followed by Black Sea horse mackerel (5.6 percent), red mullet (3.6 percent), turbot (1.3 percent), blue fish, thornback ray, and goby. Conch traditionally accounts for the highest percentage of the Black Sea shellfish catch with 34 percent of all

Black Sea catch. In 2023, the conch catch was 2,290 MT, a six percent increase from 2022. The soft-shell clam catch was 153 MT, just half of 2022 levels.

Table 4. Black Sea Catch by Species 2022 and 2023

Specie	MT		Change 2022/2023
	2022	2023	
European Sprat	1,561	3,264.3	109.1%
Shellfish (Conch, Mussel, Clam, Shrimp)	2,727	2,577.5	-5.5%
Red Mullet	181	241.2	33.3%
Bluefish	513.2	36	-93%
Black Sea Horse Mackerel	194.5	373	91.8%
Turbot	54.9	84.4	53.7%
Goby	17.3	13	-24.9%
Thornback Ray	16.8	22.7	35.1%
Other species	127.4	55.02	-56.8%
Total Black Sea Catch	5,546.50	6667.12	20.2%

Source: Bulgarian Executive Agency for Fisheries and Aquaculture

Freshwater Fisheries

Bulgaria has over 200,000 HA of lakes, reservoirs, and rivers, which account for about two 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 2023 was 36.7 MT, a 22 percent decrease from 2022. The Danube catch in 2023 consisted mainly of carp (16 percent), Prussian carp (14 percent), bighead carp (10 percent), Wels catfish (9 percent), grass carp (8 percent), common barbel (6 percent), and other.

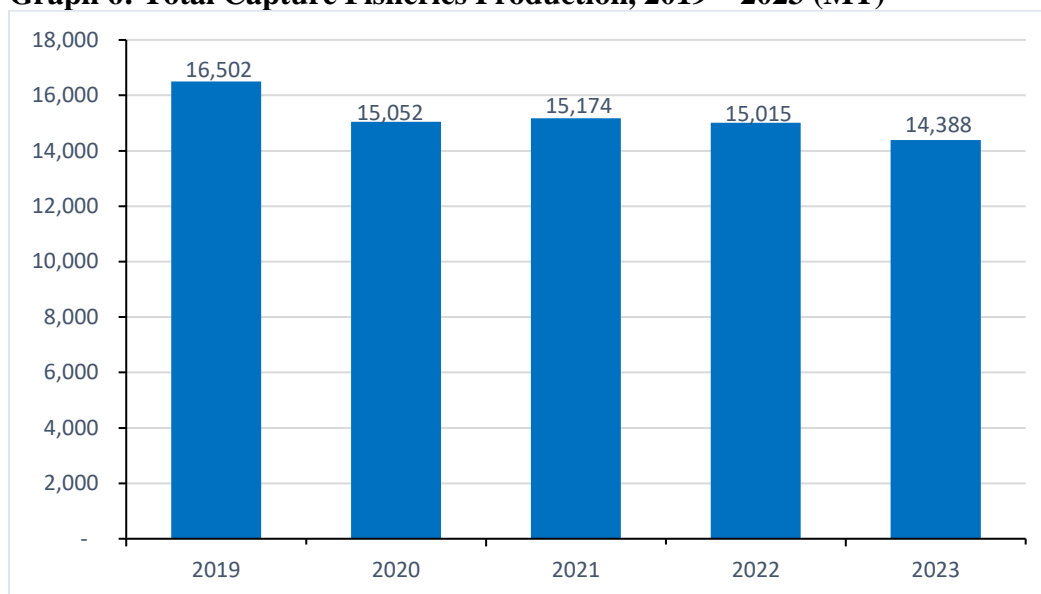
In 2012 the Ministry of Agriculture and Food banned fishing, transporting, and the sale of sturgeon and product derived from sturgeon. The ban aims to protect and preserve the Danube's sturgeon population as it is considered as one of the most endangered species. In 2020 the ban was extended until the end of 2025.

Aquaculture

Total 2023 aquaculture production (breeding material, fish, and seafood) decreased by four percent from the previous year to 14,388 MT and is still lower than the pre-pandemic years. Total 2023 production of breeding material decreased significantly by 45 percent to 1,414 MT due to a decrease in production of some of the main fish species grown in fish farms.

In 2023 the total capture of aquaculture fish (12,938 MT) was up 2.7 percent from 2022, mostly rainbow trout, carp, and bighead carp. Black mussel capture increased by 5.3 percent to 2,552 MT.

Graph 6: Total Capture Fisheries Production, 2019 – 2023 (MT)



Source: Bulgarian Executive Agency for Fisheries and Aquaculture

According to the Ministry of Agriculture and Food and the [Bulgarian Executive Agency for Fisheries and Aquaculture](#) (BEAFA), as of end 2023 there are 740 active aquaculture farms in Bulgaria, of which 719 for fresh water and 21 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 mandates 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. This guide explains the mandatory information that 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.

Opportunities for U.S. Suppliers

The Bulgarian fish and seafood market offers opportunities for U.S. suppliers, driven by a steady increase in imports and a growing demand for diverse, high-quality products. Bulgarian importers are

actively seeking to expand the variety of fish available to consumers, particularly in the mid and high-value categories. The foodservice sector, which is a key driver of this demand, continues to grow, further boosting the market for imported seafood. According to Intrastat data from the Bulgarian National Statistical Institute (NSI), imports from the United States surged by 172 percent in 2024, primarily consisting of frozen hake, sockeye salmon, Alaska pollock, lobsters, crustaceans, mollusks, and scallops. However, total imports remained below \$1 million.

U.S. suppliers face challenges such as import duties and competition from countries benefiting from tariff-free trade with the EU. Despite these obstacles, the rising consumer incomes and demand for healthier food options create a favorable environment for U.S. suppliers to introduce premium seafood products. Additionally, opportunities exist in supplying raw materials to Bulgaria's fish and seafood-processing sector, which adds value and sells products throughout the EU.

In summary, while U.S. suppliers must navigate pricing and duty challenges, the expanding Bulgarian market, driven by the foodservice sector and a growing demand for diverse seafood products, presents opportunities for growth and market penetration.

Bulgarian Fish and Seafood Importers

Contact [FAS Sofia](#) for an updated list of fish and seafood importers and/or Bulgarian institutions.

FAS Sofia's Contact Information:

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Attachments:

No Attachments.