Required Report - public distribution

Date: 12/15/2017

GAIN Report Number: BU1737

Bulgaria

Exporter Guide

Exporter Guide Bulgaria

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Report Highlights:
Bulgaria joined the European Union (EU) in 2007 and has achieved consistent economic stability and growth. Recent political changes have resulted in more stable relations with other EU Member States and trade has grown as a result. Although Bulgaria serves as a gateway into Eastern Europe and the wider EU common market, direct U.S. food and agricultural exports remain relatively moderate, although they are growing. In 2016, U.S. food and agricultural exports to Bulgaria were upwards of $63.7 million, a 12-percent increase over 2015 (Bulgarian National Statistical Institute). Despite significant strides toward becoming a market economy, Bulgaria’s agricultural economy remains

vulnerable to world market fluctuations.

Post:
Sofia

Executive Summary:

I. Market Overview

This report used the Bulgarian National Bank's average 2016 exchange rate: $1.0=BGN 1.86.

General Economy

Bulgaria continues its transition into a market economy and Government of Bulgaria (GOB) intervention in foreign investment and trade is decreasing. At the beginning of this transition in 1989, there was essentially no private-sector workforce. By 2017, nearly 75 percent of Bulgaria's workforce was employed by private enterprise. Exports generate about 49 percent of gross domestic product (GDP) and are a pillar of the country's economy. The biggest shares of exports are in industrial supplies, consumer goods, fuels, and lubricants. Some Bulgarian officials argue that dependence on exports and foreign investments makes the domestic economy too vulnerable to global demand fluctuations. (Source: Bulgarian National Bank).

The International Monetary Fund (IMF) increased its 2017 and 2018 economic growth forecast for Bulgaria by 3.6 percent and 3.2 percent, respectively. The IMF also expects prices of Bulgarian goods and services to increase over both years and forecasts annual inflation at1 percent and 1.8 percent, respectively. In 2016, the national unemployment rate reached 7.6 percent, a decrease of 1.5 percent from 2015 (source: National Statistical Institute (NSI).

The Bulgarian economy continues to transition from command-and-control to full market-orientation. In 1989, Bulgaria's leading trade partner was the Soviet Union, which accounted for 65 percent of exports and 53 percent of Bulgarian imports. Today, EU Member States are Bulgaria's primary trading partners, although there are significant balance of trade variations between the different Member States. In 2016, Bulgaria had a trade deficit in goods of about BGN 4.02 billion ($2.16 billion), BGN 2.58 billion less than in 2015.

National Economy	**2014**	**2015**	**2016**
GDP (billion BGN)	83,634	88,571	94,130
GDP (billion USD)	51.947	49.481	50.607
GDP per capita (BGN)	11,577	12,339	13,206
GDP per capita (USD)	7,190	6,893	7,100
Exchange Rate	**$1=BGN 1.61**	**$1=BGN 1.79**	**$1=BGN 1.86**

Source: Bulgarian National Bank

Bulgaria's leading food and agricultural trading partners are EU Member States (about 70 percent), neighboring countries, and Russia. Top EU food and ag trading partners are Romania (15.7 percent), Greece (14.6 percent), Germany (13.4 percent), Poland (10.5 percent), and the Netherlands (7.9

percent). The top non-EU food and ag trading partners are Turkey, the United States, China, Macedonia, and Serbia. Agricultural trade with the former-Soviet Commonwealth of Independent States (including Russia) increased by three percent in 2016. (Source: Ministry of Agriculture's Agrarian Report).

Total two-way trade in agriculture, fish, and forestry products between the United States and Bulgaria in 2016 reached $175.8 million, with U.S. exports at $63.7 million and Bulgarian exports at $112.1 million (source: Intrastat report from the Bulgarian National Statistical Institute for the U.S. exports and U.S. Customs –BICO for the imports). Data indicate that bilateral trade between Bulgaria and the United States is growing, despite the strong dollar against the euro and other European currencies. U.S. Exports to Bulgaria during January-June 2017 increased by over 12 percent over the same period in 2016 (Source: Intrastat statistics from the Bulgarian National Statistical Institute).

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 (EURO 1 = BGN 1.95583)

The chart below demonstrates Bulgaria's **agricultural** export and import statistics in recent years:

International Transactions *Billion EURO*	2014	2015	2016
Exports (FOB)	3.7	3.73	4.04
Imports (CIF)	2.47	2.71	2.84
Balance	+1.23	+1.02	+1.2
Commodity Circulation	6.17	6.44	6.88

Source: Ministry of Agriculture and Food – Agrarian Report 2017

Geography and Demographics

Bulgaria is strategically located in Southeastern Europe, on the commercial route between Europe and Asia. As of December 2016, Bulgaria's population totaled 7.1 million people, representing 1.4 percent of the EU's population, and a total area of about 111,002 square kilometers. Its population density is roughly 64 persons per square kilometer. 63,765 square kilometers of Bulgarian territory is agricultural land; 37,158 sq.km. are forest; 4,603 sq. km. are settlements and/or other urban areas; 2,390 sq. km are water and wetland areas; 2,711 sq. km. are territory for mining and quarrying raw materials.

The total length of the country's road network is approximately 19,589 km and the total length of the railways is 6,517 km. Bulgaria has developed and improved its infrastructure, including seven national highways (737 km.), 230 railway stations, four international airports, two big Black Sea seaports, and numerous river ports on the Danube River. Priority road infrastructure projects in Bulgaria through 2020 include construction of 508 km and construction/rehabilitation of more than 850 km of highways, two new bridges over the Danube and the Shipka Tunnel construction. Five (of 10) pan-European corridors cross the country, linking Western and Northern Europe with the Middle East and North Africa.

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 and supports inland water transport. 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 a population of over 1.33 million people and is situated in the country's southwestern region. The second and third largest cities in Bulgaria are Plovdiv in southcentral Bulgaria, with a population of 671,573 people, and Varna on the west coast of the Black Sea, with a population of 472,654 people (as of December 2016 – source: NSI).

As of December 31, 2016, 5.2 million (73.3 percent) of the total population resided in urban areas and 1.9 million (26.7 percent) in rural areas. The Bulgarian population has contracted in recent years and senior citizens (65 years and over) now make up over 24 percent of the population. The population of working age as of December 31, 2016 was 4.3 million persons (60.6 percent) of the total population. The traditional nuclear family is gradually being replaced by cohabitation and one child. The 2016 birth rate decreased slightly to 0.91 percent, from 0.92 percent in 2015.

Younger Bulgarian consumers behave differently from older people and/or retirees. Younger workers tend to earn higher incomes, have greater purchasing power, purchase higher-quality products, visit restaurants, and travel. Older consumers and pensioners often receive less pay (or pensions) and limit themselves to the staple products and basic needs. The average Bulgarian salary in Bulgaria is about $ 6,206 (BGN 11,544 - source Bulgarian National Bank), while the average annual pension is about $2,206 (BGN 4,104, source: Bulgarian National Social Security Institute). The data demonstrate that young people have almost three times the purchasing power of pensioners. There are also significant consumption differences between urban dwellers and those living in small towns and villages. Cities tend to have lower levels of unemployment and higher incomes (therefore more young people). The chart below illustrates the average demographics in recent years:

Bulgarian Demographics	2014	2015	2016
Birth Rate (percent)	0.94	0.92	0.91
Death Rate (percent)	1.51	1.53	1.51
Age Structure 0 – 15 yrs (percent)	14.8	14.9	15.0
Age Structure 15–65 yrs (percent)	61.1	60.8	60.6
Age Structure 65+ yrs (percent)	24.1	24.3	24.4

Source: Bulgarian National Statistical Institute

I. Exporter Business Tips

Import Agents

Although large companies may have internal logistics personnel in Bulgaria, many exporters appoint of a local import agent to act on their behalf. Stakeholders interested in obtaining a list of knowing local import agents can contact the U.S. Embassy Sofia's Office of Agricultural Affairs or representatives of commodity or trade associations such as the American Chamber of Commerce in Bulgaria.

Although factors are subjective and may vary, key issues to consider include:

- What is the extent of the agent's network of distributors, owned or leased storage capacity, and owned or leased transportation arrangements?
- Does the agent have strong contacts with the responsible purchasing managers in the target sales channels?
- Does the agent have a high proportion of direct-to-market channels or are they heavily dependent on multiple distribution levels?
- Is the agent developing value-added communications and promotions or are they overly dependent on price discounts?
- Does the agent have complementary product lines? Although cases vary, exclusivity can provide better incentives to the agent and can help the exporter to maintain improved supervision over price and product integrity.
- Is the agent connected to other Balkan markets for future sales expansion opportunities?

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 middleman. The best method to reach Bulgarian retail buyers and prospective importers is to contact them directly via e-mail or fax. Product catalogues and price lists are essential, and samples are helpful. The bigger retailers in Bulgaria include Kaufland, Metro, Lidl, Billa, CBA, and Fantastico. For more up-to-date information, please refer to FAS Sofia's GAIN Retail Market Report.

A visit to Bulgaria is strongly recommended to establish meaningful relationships with Bulgarian buyers. Personal relationships and face-to-face meetings are important. While visiting Bulgaria, it is advisable to bring product samples to show potential buyers, as many importers and retailers rely heavily on subjective factors when deciding on new products to represent. **Post recommended that the**

companies contact [FAS Sofia](#) for guidance when arranging a trade visit to Bulgaria.

Bulgarian businesses are usually interested in several products instead of single product lines. As incomes increase, consumers tend to look for more variety and importers constantly look for new products, including new-to-market products and new brands of certain products. Conversely, other importers follow more customary Bulgarian pattern of collecting basic information (samples, catalogues, prices, supply schedules, etc.). Trial orders to test the market might then be placed. Many importers specialize in certain product categories and often join together in consolidated shipments to lower associated risk and costs.

Sales and Marketing

Although sales and marketing techniques in Bulgaria are still evolving, it remains a price-sensitive market and discounts are commonly used and expected. U.S. food and beverage suppliers, particularly those in the higher-value categories, may seek to mitigate discount demands by focusing on market education, sales training, and brand development.

More Bulgarian consumers are willing to pay price premiums for foods and beverages perceived as 'healthful' or 'nutritious'. Bakery products, confectioneries, soups, oils and fats, and a wide range of nutritional supplements are just a few examples of product categories for which marketing strategies based on nutritional and health messages have proven to be highly successful.

Bulgarian Business Customs

Bulgarian business contacts tend to be direct and informal in their approach and do observe strict business protocols found in other countries. Although procurement and purchasing managers are always searching for new products, they tend to be thorough in product evaluations. They prefer to see product samples whenever possible and will often place small trial shipments to test the market response.

Some local customs are worth observing. For example, offering holiday greetings and giving small gifts during major holidays (Christmas, New Years, and Orthodox Easter) are common and appreciated. These holidays are also high sales periods and American companies may consider introducing new products to coincide with these busy holiday seasons. One example is that many bakery product companies will purchase baking ingredients as early as February or March for Easter cake sales, depending on the Orthodox calendar.

Bulgarians enjoy eating and drinking and introductory meetings may be over lunch or dinner. Meeting over a meal and/or drinks is a basic way to conduct business relationships and considered important for building rapport and mutual understanding. Local businessmen are usually gracious and may invite trade contacts to dinner. Drinking toasts can usually be expected, sometimes involving the grape-based spirit "rakia" during special occasions. Red wine is increasingly common to drink with meals and reciprocal toasting is a good means toward establishing relationships.

Language Barrier

Speaking Bulgarian is not essential in order to do business in the country, but U.S. companies are advised to verify the level of English fluency of their potential business partners. A high percentage of

Bulgarian residents speak fluent English, especially those under 40, who have often taken English lessons. Translation services are easy to find and written materials such as company information, product brochures, etc. will be resonate much more if translated into Bulgarian.

Food Standards and Regulations

Bulgarian food standards and regulations are harmonized with those of the EU. Phytosanitary and veterinary controls may be applied on traded plant and animal-origin products. Bulgarian food processors observe HACCP.

U.S. companies should observe product-labeling requirements vis-à-vis health or nutritional claims, which require approved by the Bulgarian Food Safety Agency and Ministry of Agriculture and Food. Supplementary labels (i.e. stickers) must also be translated into Bulgarian and should include the type of product, product name, name(s) of the manufacturer and importer, full list of ingredients, and shelf life. Bulgaria also introduced country-specific labeling requirements for certain products. For example, dairy-based product containing vegetable oil, not 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". Mandatory coloring of the labels were introduced at the retail level, including white labels for dairy-based products containing vegetable oils. 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 European Food Safety Agency and Bulgarian Food Safety Agency websites.

III. Market Sector Structure and Trends
Food Imports

Agriculture made up 4.4 percent of Bulgaria's GDP in 2016. Land in Bulgaria is most commonly measured by the *decare* (*daa*), with10 *daa* equate to one hectare. Domestically, Bulgaria produces wheat, barley, corn, sunflower, tobacco, rapeseed, fresh vegetables, fruits, and grapes. Bulgaria exports cereals, tobacco, and oil seeds and imports meat, vegetables, fruits, sugar, fish, and coffee. Bulgaria is a relatively small market for U.S. agricultural exports. Its positive global agricultural trade balance reached €1.2 in billion 2016, a slight increase from €1.04 billion in 2015.

Imports from the United States: According to the Intrastat data from the Bulgarian National Statistical Institute, imports from the United States topped nearly $63.7 in 2016, up 11.7 percent over 2015. Bilateral trade relations are positive and evolving. Demand growth for U.S. agricultural exports is increasing.

Bulgaria's EU accession negatively affected U.S. fruit product imports, as EU horticultural products gained duty-free and facilitated access. EU FTAs with non-EU countries also threaten U.S. exports, as some products enter Bulgari and other EU Member States with low tariffs or duty-free. The EU also effectively bans U.S. poultry meat (since 1997) due to its probation of U.S.-approved pathogen reduction treatments, which provide added hygiene and product safety.

Food Processing Sector

Food processing in Bulgaria accounts for about 20 percent of total industrial production. The food processing sector employs about 100,000 people and was valued at about $5.2 billion in 2016. Prior to CY 2016 there was a visible shift in trade and consumption trends toward more expensive, higher-quality products, including distilled spirits, snack foods, tree nuts, seafood, and soft drinks. This trend has persisted, despite regional economic and financial uncertainty. U.S. ingredient exports to Bulgaria in several product categories, such as tree nuts, dried fruits, and peanuts, achieved sizable increases. Post expects that the volume of the exports of these and other products will remain stable in 2017, despite the strong dollar versus the euro and other European currencies.

Competition in the foodservice industry is intense and is expected to continue. Both local and imported brands and products will compete for sales and market share. Competition will likely be determined by products and service quality (regular supplies, pack sizes, price promotions, and the renewal of portfolios).

The following products have good sales potential on the Bulgarian market: distilled spirits, tree nuts, peanuts, dried fruits, snack/cereal foods, pulses, beef, prepared food, wine, seafood products, and soft drinks/juices. Some stakeholders anticipate that foreign companies will concentrate on higher added-value product types, such as dairy-based and ice cream desserts, soup, ready meals and sauces, while domestic companies will compete effectively in dairy, bakery, processed meats, and oils and fats. For more comprehensive information about the Bulgarian food processing sector, please refer to FAS Sofia's latest **Food Processing Ingredients** report.

Food Retail Sector

The food retail sector underwent significant changes during the last two years. In late 2015, the German-based REWE Group announced its withdrawal of their discounter Penny Market from Bulgaria. A year later the French-based Carrefour, represented locally by the Marinopoulos Group, closed its doors, followed by Piccadilly, which changed hands several times over the last five years. This churn in the market cost about BGN 400 million and left over 80 outlets vacant. According to Euromonitor, modern-retail outlets in Bulgaria currently stand at 3,913 stores, which represent 9.3 percent of 42,082 total grocery retail outlets. In 2016 the retail market was valued at about BGN 10.4 billion ($5.38 billion). Modern retail sales reached BGN 5.44 billion ($2.92 billion) and total market share was about 53 percent, which is likely to increase slightly over the next few years. The remaining 47 percent (valued at almost BGN 4.93 billion or $2.65 billion) was held by almost 38,200 independent/traditional grocery outlets. Although independent retailers lost ground in 2016, these small grocers remained the largest channel in terms of sales, with almost BGN 3.0 billion ($1.61 billion). This is a result of a good combination of convenience and budget focus offered by small grocers. The CEOs of the biggest retail chains operating in Bulgaria claim that they will continue to open new outlets, optimize their networks, and close unprofitable stores.

Top 10 Retailers and Number of Outlets

Retailer	Owner	Nationality	Opened	Outlets (2010)	Outlets (2015)	Outlets (2016)
Kaufland Bulgaria	Schwarz Group	Germany	2003	35	55	58

Lidl Bulgaria	Schwarz Group	Germany	2010	25	79	86
Billa Bulgaria	REWE Group	Germany	1999	84	100	110
CBA	CBA	Bulgaria	2003	156	204	205
Fantastico	Valeri Nikolov	Bulgaria	1991	33	38	40
Carrefour	CMB	France	2008	5	13	0
Penny Market	REWE Group	Germany	2009	47	0	0
Piccadilly	AP Mart	Bulgaria	1994	31	21	0
Metro Cash & Carry	Metro	Germany	1999	13	15	13
T-Market	Maxima Group	Lithuania	2005	33	47	63

For more comprehensive information about the Bulgarian retail market, please refer to FAS Sofia's 2016 **Retail Market** report.

HORECA Sectors

The hospitality, restaurant, and catering (HORECA) sectors in Bulgaria remain relatively young and are developing. HORECA has developed rapidly over the last decade, as tourism, shopping malls, and high-end restaurants have sprung up around the country. These sectors are working to strengthen the quality of service. At the end of 2016, Bulgaria had 35,051 consumer service outlets and HORECA employed about 145,000 people with a turnover of close to 4.2 billion leva ($2.26 billion) (source: Euromonitor). Since 2000, the number of outlets grew annually by 18 percent starting from 29,700. The number of outlets is the highest in the southwest part region, followed by the southeast and southcentral regions.

For more comprehensive information about the Bulgarian HORECA food service industry, please refer to FAS Sofia's latest HRI report **here**.

Organic Foods Sector

Organic farming has thrived, driven by improved export demand in the EU, high production subsidies, and favorable governmental policies. Despite rapid development, the total share of organic farming remains small. Land under organic production grew almost fourfold between 2010 and 2015, and reached 2.4 percent of all agricultural land. However, organic food sales account for less than one percent of total food sales, due to low purchasing power of consumers. Over 80 percent of locally-produced organic products are exported, while most organic foods on the market are imported. Bulgaria is known its exports of organic aromatics, medicinal, and culinary herbs. Major challenges for the organic sector are deficiencies of the certification system, dependence on domestic supports, and low local consumer demand.

Imported organic products dominate and account for over 60 percent market share. Most imports come from Austria, Germany, Italy, Greece, and the Netherlands. Currently imported organic products have better marketing, availability, and variety for the local consumers. They are "trusted" as genuinely organic. Several multinational brands have launched organic versions of their products. Due to the lack of established local processors, U.S. processed organic food exporters and food ingredients may benefit from the existing EU equivalency agreement. 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 the latest **Organic Sector and Trade Update** GAIN report issued by FAS Sofia.

IV. Best Consumer Oriented Product Prospects

Product	2015>2016 Imports (U.S. $ in millions)	Import Tariff Rate	Constraints over Market Development	Market Attractiveness for U.S.
Grape Wines	18.3 > 17.5	13.10 Euro/HL for still, and 32.00 Euro/HL for sparkling. Excise Tax= 0 percent VAT = 20 percent	Bulgarian wines still dominate the market. Imported wines account for about 19 percent of total wine volume.	Bulgaria's wine industry produces high-quality wine. Consumers prefer mainly local brands. In recent years, EU and new world wine imports have increased. Bulgarian consumers' low purchasing power and strong local competition remain challenging. Most consumers of commercial wine are urban. Home-made wine dominates in smaller cities and villages. U.S. wine imports have increased and local consumers are more aware of it. For more information about the Bulgarian wine sector, please see FAS Sofia's latest GAIN report

				here.
Tree Nuts (HS 0802 and 2008)	53.4 > 49.8	From 0 to 12.8 percent depending on the type of the nuts. More information pertaining to other dried fruits and nuts is available in the EU official Journal pages 94 through 100, 157, and 165.	African countries, China and Middle East countries are the main competitors to U.S. exporters in Bulgaria. The Chinese and African nuts are considered of lower quality due to lower quality standards.	American tree nuts are dominant in the Bulgarian market. For more information, see FAS/Sofia's Tree Nuts Annual report here and the Peanuts Market Brief here.
Distilled Spirits (HS 2208)	92.8 > 99.9	See the unified tariff schedule, where the actual tariff rates for different products can be found. For more detailed information, the TARIC database is accessible from here. For more detailed information about the excise tax rates for alcoholic beverages applicable in the EU as of July 1 2013, please refer to the official web page of the EU's General Taxation and Customs Union Directorate here.	Scotch and Irish whiskies are still dominant on the Bulgarian market. U.S. whiskey's market share is about 20 percent.	For more information see FAS Sofia's Distilled Spirits Market brief report here.
Food Preparations (HS 2106)	91.8>101.5	Varies by type. Detailed information on food preparations tariffs can be found in the official EU Journal in pages	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

		173-174.		the products.
Beef	34.2 > 40.2	For more information see FAS Warsaw's General Guidance on Exporting High-Quality Beef to EU report here.	Strong competition from Latin American and European producers/exporters; U.S. beef costs more than other imported beef; Limited purchasing power of the average Bulgarian consumer.	Awareness of high quality of the U.S. beef on the Bulgarian market remains moderate among commercial and private sector customers; Positive perception and good image for U.S. beef should be created by educating the main buyers (restaurants and hotels) about its high quality and diversified tastes. For more information see FAS Warsaw's General Guidance on Exporting High-Quality Beef to EU report here.
Fish and Seafood	89.2 > 96.4	Tariffs for seafood products exported to the EU range from zero to 22 percent depending on species, level of processing, and the time of year. Detailed information on seafood tariffs can be found in the official EU Journal in pages 47-69 and 134-139.	The Bulgarian market is supplied with various types of fresh saltwater and freshwater fish, as well as frozen sea and ocean fish. Frozen fish is well accepted by the consumers. Recently the consumption of other types of sea food is also increasing.	The increasing consumption of seafood in Bulgaria offers good opportunities for U.S. exporters. U.S. suppliers can use this trend of increasing sea food consumption in the country. For achieving this goal, U.S. exporters must overcome the competition from other EU exporters (Greece, Spain, Netherlands, etc.), as well as, Argentina, Chile, China.

				For more information see FAS Sofia's Fish and Seafood Market Brief report here.

Source: Global Trade Atlas; FAS Sofia researches; National Statistical Institute

V. Key Contacts and Further Information
American Institutions in Bulgaria

Office of Agricultural Affairs
U.S. Embassy
16 Kozyak Str., Sofia 1408, Bulgaria
Tel: (359) 2-939-5774
E-mail: alexander.todorov@fas.usda.gov; agsofia@fas.usda.gov
Website: https://bg.usembassy.gov/embassy/sofia/sections-offices/fas/

United States Department of Agriculture, Foreign Agricultural Services
U.S. Department of Agriculture, Washington, D.C. 20250
E-mail: info@fas.usda.gov Website: http://www.fas.usda.gov

Bulgarian Central Authority Agencies

Ministry of Agriculture and Food
Blvd. Hristo Botev 55 Sofia 1040 Bulgaria
Tel: (359) 2-985-11858; Fax: (359) 2-981-7955
Website: http://www.mzh.government.bg

Ministry of Health
Sqr. Sveta Nedelya 5, Sofia 1000, Bulgaria
Tel: (359) 2-981-0111
E-mail: press@mh.government.bg Website: http://mh.government.bg

Bulgarian Food Safety Agency
Bul. Pencho Slaveikov 15A, Sofia 1606, Bulgaria
Tel: (359) 2-915-98-20 Fax: (359) 2-954-9593
E-mail: bfsa@bfsa.bg
Website: http://www.babh.government.bg/en/

Bulgaria Customs Agency, Ministry of Finance
Str. Rakovski 47, Sofia 1202, Bulgaria
Tel: (359) 2-9594-210 Fax: (359) 2-9859-4528

E-mail : pr@customs.bg Website : http://customs.bg

Ministry of Economy, Energy and tourism
Str. Slavyanska 8, Sofia 1000, Bulgaria
Tel: (359) 2-940-71 Fax: (359) 2-987-2190
E-mail : e-docs@mee.government.bg Website: http://www.mi.government.bg

Major Bulgarian Trade Associations

American Chamber of Commerce in Bulgaria
Business Park Sofia, bld. 2, fl. 6. Sofia 1766 Bulgaria
Tel: (359) 2-9742 Fax: (359) 2-9742-741
E-mail: amcham@amcham.bg Website: http://www.amcham.bg

Bulgarian Chamber of Commerce and Industry
Str. Iskar 9, Sofia 1058 Bulgaria
Tel: (359) 2-811-740 Fax: (359) 2-987-3209
E-mail: bcci@bcci.bg Website: http://www.bcci.bg

Bulgarian Industrial Association
Str. Alabin 16-20, Sofia 1000 Bulgaria
Tel: (359) 2-932-0911 Fax: (359) 2-987-2604
E-mail: office@bia-bg.com Website: www.bia-bg.com

Association of Producers, Importers and Traders of Spirits
NDK Prono fl. 15 offices 8&9, Sofia 1414 Bulgaria
Tel: (359) 2-963-1254 Fax: (359) 2-963-1254
E-mail: office@spirits.bg Website: http://www.spirits.bg/

Bulgarian Association of Dairy Processors
Zh.K. Lagera bl. 44 vh. A Sofia 1612 Bulgaria
Tel: (359) 2-953-2723 Fax: (359) 2-952-3265
E-mail: bam@mb.bia-bg.com Website: http://www.milkbg.org

Association of Meat Processors in Bulgaria
Shipchenski Prohod Blvd. 240 ent. A floor 3, Sofia Bulgaria
Address for correspondence Post Box 61 AMB Sofia 1111 Bulgaria
Tel: (359) 2-971-2671 Fax: (359) 2-973-3069
E-mail: office@amb-bg.com Website: https://www.amb-bg.com/

Branch Chamber of Industrial Bread Producers and Confectioners in Bulgaria

5 Bacho Kiro Str., Sofia 1000 Bulgaria
Tel: (359) 889-49-40-40
E-mail: bread_industrial@abv.bg Website: http://www.bread-industrial.org/index_en.html

Association of Fish Products Producers - BG Fish
Vitosha Blvd. 31-33, Sofia 1000, Bulgaria
Tel: (359) 2-981-7589 Fax: (359) 2-981-7589
E-mail: bgfish@bgfish.com Website: http://www.bgfish.com

Union of Bulgarian Millers
Pavlina Unufrieva Str. 4, Sofia 1510 Bulgaria
Tel: (359) 2-936-7925 Fax: (359) 2-865-0677
E-mail: office@agromill.com Website: http://www.ubm-bg.org/index.php?ul=2&lang=EN

Appendix - Statistics

A. 2015-2016 Bulgaria Demographic Information

	2015	2016
Total Population (thousands)	7,154	7,1
Population Increase Rate (percent)	-0.7	-0.7
Population Density (persons/km^2)	63	64
Birth Rate (‰)	9.2	9.1
Death Rate (‰)	15.3	15.1
Labor Force (thousands)	4,349	4,3
Unemployment Rate (percent)	9.1	7.6

Source: National Statistical Institute Bulgaria

A. 2015-2016 Bulgaria Trade Information

	2015	2016
GDP (million BGN)	88,571	94,130
GDP per capita (BGN)	12,001	13,206
Economic Growth Rate (percent)	+ 3.6	+ 3.9
Ag Exports FOB (Thousand Euro)	3,747,251	4,036,993
Ag Imports CIF (Thousand Euro)	2,705,181	2,839,205
Foreign Exchange Rate (USD = BGN)	1 USD = 1.79 BGN	1 USD = 1.86 BGN

Source: Bulgarian National Bank; Ministry of Agriculture's Agrarian Report

A. 2014-2016 Top 20 Suppliers of Consumer Foods to Bulgaria

Bulgaria Import Statistics

Commodity: Consumer Oriented Agric. Total, Group 32 (2012)							
Calendar Year: 2014 - 2016							
Partner Country	**United States Dollars**			**Percent Share**			**Percent Change 2016/2015**
	2014	**2015**	**2016**	**2014**	**2015**	**2016**	
World	1,878,531,134	1,652,263,428	1,769,263,122	100.00	100.00	100.00	7.08
Germany	303,776,675	246,342,198	247,725,194	16.17	14.91	14.00	0.56
Poland	242,218,668	207,665,203	216,642,252	12.89	12.57	12.24	4.32
Romania	172,575,591	168,396,809	170,033,058	9.19	10.19	9.61	0.97
Greece	184,929,155	149,560,579	153,597,542	9.84	9.05	8.68	2.70
Italy	93,028,600	82,785,550	116,131,802	4.95	5.01	6.56	40.28
Spain	106,382,297	101,484,616	115,637,397	5.66	6.14	6.54	13.95
Turkey	102,607,558	101,314,799	108,169,201	5.46	6.13	6.11	6.77
Netherlands	124,152,886	113,301,104	104,683,336	6.61	6.86	5.92	- 7.61
France	108,701,329	82,961,708	77,073,980	5.79	5.02	4.36	- 7.10
Hungary	80,229,831	66,197,399	69,718,536	4.27	4.01	3.94	5.32
Austria	42,705,171	37,713,951	43,444,474	2.27	2.28	2.46	15.19
Czech Republic	40,569,480	39,474,267	41,305,362	2.16	2.39	2.33	4.64
Belgium	41,913,674	31,246,204	40,387,225	2.23	1.89	2.28	29.25
Serbia	15,885,451	19,789,827	28,968,961	0.85	1.20	1.64	46.38
United Kingdom	18,151,797	14,530,625	24,461,267	0.97	0.88	1.38	68.34
Macedonia	20,212,890	16,711,068	18,141,942	1.08	1.01	1.03	8.56
United States	16,312,484	13,165,888	15,239,523	0.87	0.80	0.86	15.75
Ecuador	15,037,458	14,369,655	14,776,121	0.80	0.87	0.84	2.83

Denmark	16,533,033	13,899,389	13,570,705	0.88	0.84	0.77	- 2.36

Source: Global Trade Atlas

A. **2014-2016 Top 15 Suppliers of Fish & Seafood Products to Bulgaria**

Bulgaria Import Statistics Commodity: Fish & Seafood Products, Group 9 (2012)							
Calendar Year: 2014 - 2016							
Partner Country	**United States Dollars**			**Percent Share**			**Percent Change**
	2014	**2015**	**2016**	**2014**	**2015**	**2016**	**2016/2015**
World	87,374,385	89,219,367	96,379,960	100.00	100.00	100.00	8.03
Denmark	5,096,281	4,464,946	11,641,566	5.83	5.00	12.08	160.73
Spain	8,902,170	9,058,429	266,352	10.19	10.15	10.65	13.33
Greece	9,156,346	9,922,263	9,928,576	10.48	11.12	10.30	0.06
Czech Republic	8,557,208	8,168,303	6,594,832	9.79	9.16	6.84	- 19.26
Netherlands	5,219,394	7,247,923	6,197,375	5.97	8.12	6.43	- 14.49
Canada	1,677,006	4,257,693	5,990,219	1.92	4.77	6.22	40.69
Sweden	3,209,104	6,860,429	5,641,836	3.67	7.69	5.85	- 17.76
Germany	5,095,439	4,861,057	5,515,933	5.83	5.45	5.72	13.47
Romania	5,129,330	5,237,618	4,395,821	5.87	5.87	4.56	- 16.07
Lithuania	5,407,050	3,585,072	4,305,703	6.19	4.02	4.47	20.10
United Kingdom	5,026,990	1,899,914	2,723,307	5.75	2.13	2.83	43.34
Poland	2,724,801	2,733,440	2,494,604	3.12	3.06	2.59	- 8.74
Turkey	768,562	1,275,668	1,710,829	0.88	1.43	1.78	34.11
Norway	1,651,710	1,921,969	1,482,248	1.89	2.15	1.54	- 22.88

Source: Global Trade Atlas

The public reports published by FAS Sofia in 2016 and 2017 can be reached by following the links from the below tables

2016
FAIRS Narrative
Grain and Feed Market Update
Distilled Spirits Market Brief
Oilseeds and Products Market Update
Grain and Feed Update
Oilseeds Update
Retail Market Update
FAS Sofia Promotes U.S. Agricultural Products at a Big Culinary Festival in Bulgaria
Food Processing Ingredients Bulgaria
Bulgarian Stone Fruit Annual
Poultry and Products Annual
Livestock and Red Meat Annual
Wine Annual
Dairy Annual
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2017
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