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Report Highlights:

Bulgaria is a small but growing market for U.S. food and agricultural products. In 2022, total Bulgarian food and agricultural imports were valued at \$8.48 billion, up 38 percent from 2021, of which 1.1 percent, or \$92.2 million, were sourced from the United States. During the first nine months of 2023, total food and agricultural imports decreased by 12 percent compared to the same period in 2022. However, U.S. food and agricultural imports grew by nearly 20 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

Bulgaria’s GDP growth has been around 3% on average since 2018. In 2020 it dropped by 4% in the wake of COVID-19 and in 2021 it grew by 7.7% compared to 2020. In 2022 Bulgaria’s GDP grew by 3.9% compared to 2021. Exports (FOB) account for 55% of Bulgaria’s GDP and are a pillar of the economy. EU Member States are Bulgaria’s primary trading partners, although occasionally there are disparities in the balances of trade. In 2022, due to the extraordinary circumstances, Ukraine was the largest agricultural exporter to Bulgaria. In 2022, Bulgaria ran a €7.67 (\$8.06) billion trade deficit in goods (Exports FOB – Imports CIF). Agriculture makes up 4.4% of Bulgaria’s GDP.

Imports of Consumer-Oriented Products

U.S. goods exported to Bulgaria must meet EU sanitary and phytosanitary requirements. For more specific information, see FAS Sofia’s Food and Agricultural Import Regulations and Standards [report](#). In 2022, consumer-oriented food imports were \$3.6 billion, a 9.7% increase compared to 2021. U.S. exports of consumer-oriented products to Bulgaria grew by 33%.

Food Processing Industry

Bulgarian food processing enjoys steady development. 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 BGN 13 billion (\$7.09 billion) in 2022. Modern retail sales accounted for BGN 8.18 billion (\$4.46 billion) or 63% and BGN 4.82 billion (\$2.63 billion) in traditional channel. Total grocery outlets were 38,628. The largest retailer, Kaufland, accounted for 17% of the grocery retail sales. Grocery e-commerce expanded significantly due to COVID-19 and the upward trend continued in 2022 but has further development potential. Urban consumers are increasingly demanding higher quality products and those perceived as healthy.

<i>SWOT Analysis</i>	
<i>Strengths</i>	<i>Weaknesses</i>
Bulgaria is accessible by sea and has an efficient distribution network. Growing food processing industry is looking for new imported ingredients. Marketing costs are low.	Some U.S. exports are disadvantaged because of EU non-tariff barriers and import duties.
<i>Opportunities</i>	<i>Threats</i>
U.S. high-value products could enjoy increasing demand due to growing incomes, a fast developing food retail network, and 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.

<i>Quick Facts CY 2022</i>	
<u>Imports of Consumer-Oriented Products</u> (\$3.6 billion)	
<u>List of Top 10 Growth Products Imported in Host Country</u>	
1) Sunflower Seeds	2) Oils
3) Food Preparations	4) Cane or Beet Sugar
5) Bread, Pastry, Cakes	6) Cocoa Preparations
7) Meat of Swine	8) Waters
9) Whiskeys	10) Coffee, not Roasted
<u>Food Industry by Channels (\$ billion) 2022</u>	
Food Exports – Agricultural and Related Products (2022)	10.4
Food Imports – Agricultural and Related Products (2022)	8.48
Retail	7.09
Food Service	3.12
<u>GDP/Population</u>	
Population (<i>millions</i>): 6.45	
GDP (\$ billion): 91.5	
GDP per capita (\$): 13,304	
<u>Bulgarian National Bank Exchange Rate:</u> \$1=BGN 1.834	
Sources: Euromonitor, Eurostat, Bulgarian National Bank, Bulgarian National Statistical Institute, Local sources. Contact: AgSofia@usda.gov	

Market Overview

The Bulgarian National Bank's 2022 average exchange rate of \$1.00 = Bulgarian Lev (BGN) 1.834 was used in this report.

The last couple of years have brought new challenges to the food and beverage industry in Bulgaria such as post-COVID-19 recovery, the Russian invasion of Ukraine, supply chain disturbances, and growing inflation. All these issues resulted in significant price increase of energy and grocery products and diminished consumers' purchasing power. This required the grocery retail, food service, and food processing industries to adapt quickly to the new environment, which they successfully did. According to the Bulgarian National Statistical Institute's (NSI) preliminary data, GDP grew by an average of two percent in the first and second quarters of 2023 and by 1.8 percent in the third quarter, compared to the same periods of 2022. Considering these data, the Bulgarian National Bank (BNB) projects GDP growth to be 1.9 percent in 2023 (down from 3.9 percent in 2022). Unemployment is very low at four percent, and the inflation is down to 5.4 percent in November 2023. BNB projects the average annual inflation to be 8.8 percent in 2023.

According to BNB, GDP growth is projected to accelerate to 2.7 percent in 2024 and 3.6 percent in 2025. Inflation is expected to slow down in 2024 to an annual average of 4.3 percent, and to keep declining to an average of 3.1 percent in 2025. Bulgaria's imports are projected to grow stronger than exports, leading to a trade deficit of 5.6 percent of GDP in 2025. Growth in domestic demand in 2024 is expected to persist. Final consumption expenditure is projected to continue rising, but at a moderate rate, supported by growth in labor income and by a continued increase in government social transfers to households.

General Economy

Bulgaria is a market economy and government intervention in international trade and among foreign investors has decreased considerably since 1989. Exports (FOB) generate 55 percent of GDP and are a pillar of the country's economy. Bulgaria's biggest exports are industrial supplies, consumer goods, and fuels.

Table 1

National Economy	2020	2021	2022
GDP (billion BGN)	120.553	139.012	167.809
GDP (billion USD)	75.63	80.49	91.5
GDP per capita (BGN)	17,386	20,212	24,399
GDP per capita (USD)	10,907	11,704	13,304
Exchange Rate	\$1=BGN 1.594	\$1=BGN 1.727	\$1=BGN 1.834

Source: Bulgarian National Bank

According to Intrastat data from the NSI, total 2022 U.S. agricultural imports into Bulgaria reached \$92.2 million, up 15 percent from 2021. According to Trade Data Monitor (TDM), which reflects reported Eurostat data, in 2022 the United States imported \$234 million of agricultural and related products from Bulgaria, mainly sunflower seeds, essential oils, animal feed preparations, cheese, bakery products, and other.

Geography and Demographics

Bulgaria is located in southeastern Europe and is an important commercial hub between Europe and Asia. According to the latest NSI data, Bulgaria's population totaled 6.45 million people, accounting for 1.5 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 about 830 km., more than 4,000 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 and Western 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. The number of passengers via Bulgarian airports increased significantly from 5.3 million in 2021 to 9.1 million in 2022, mainly due to the resumption of travel after COVID-19.

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 about 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 nearly 500,000 people, and Varna on the west coast of the Black Sea, with a population of close to 400,000 people. As in many other EU countries, Bulgaria's population is aging and nearly 26 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. In 2022, the average annual salary in Bulgaria was about BGN 22,550 (\$12,300). Due to the high inflation, for the first nine months of 2023 the average salary increased to about BGN 1,950 (\$1,063) per month. As of September 2023, the average annual pension is about BGN 9,930 (\$5,415). The data demonstrates that young people have more than twice 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 (FTAs).
Bulgarian domestic producers are receiving European funding to upgrade production efficiency and product quality.
Bulgarian farmers are increasing agricultural production, reducing demand for imports in the country.
Exchange rate fluctuations and the strong dollar disadvantage U.S. shippers. Bulgarian Lev 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. There has been a recent shift toward direct imports to avoid higher cost associated with purchasing from importers or middlemen, but this remains limited. The best method to reach Bulgarian retail buyers and prospective importers is to reach out to [FAS Sofia](#) for assistance and guidance. 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.

A visit to Bulgaria is strongly recommended to establish meaningful relationships with Bulgarian buyers. While visiting Bulgaria, it is advisable to bring product samples to show to potential buyers, 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. It is recommended that companies contact [FAS Sofia](#) in advance for guidance when arranging a trade visit to Bulgaria.

Sales and Marketing

Although sales and marketing strategies 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 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 “healthy” or “nutritious”. Nuts and dry fruits, fish and seafood, bakery products, confectionery products, soups, oils and fats, and a wide range of nutritional supplements are some examples of product categories for which marketing strategies based on nutritional and health messages have proven to be successful.

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 do business in the country, but U.S. companies are advised to verify the level of English fluency of their potential business partners. Many Bulgarian residents speak English well, especially those under 40 in urban areas. Translation services are relatively easy to find. Written materials such as company information, product brochures, etc., will resonate much more 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 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

Up until 1989, Bulgaria's leading trading partner was the Soviet Union, which accounted for more than half of Bulgarian agricultural trade. Today, other EU markets are Bulgaria's primary trading partners. In 2022, over 82 percent of the consumer-oriented products are imported to Bulgaria from other EU countries.

Bulgaria's top EU food and agricultural trading partners are Greece, Romania, Netherlands, Germany, Poland, Spain, and Italy. Main non-EU food and agricultural trading partners are Ukraine, Algeria, Turkey, China, Serbia, United Kingdom, and the United States. In 2022, due to the extraordinary circumstances, Ukraine was the largest agricultural exporter to Bulgaria. Algeria was the largest agricultural importer from Bulgaria, mainly due to increased wheat shipments.

Table 3. Bulgaria’s Agricultural Export and Import Statistics 2020-2022

International Transactions <i>Billion EURO</i>	2020	2021	2022	Percent Change 2021/2022
Exports (FOB)	4.79	6.04	8.27	36.9
Imports (CIF)	4.00	4.42	6.67	50.9
Commodity Circulation	8.78	10.46	14.94	42.8

Source: Ministry of Agriculture and Food – Agrarian Report 2023

According to TDM data, Bulgarian agricultural and related products exports during the period January - August 2023 decreased by 12.6 percent, and imports declined by 12 percent compared to the same period of 2022. FAS Sofia expects these trends to reverse for the remainder of 2023 as a result of intensified trade in the last four months.

Imports from the United States: According to Intrastat data from the Bulgarian NSI, imports from the United States topped \$92.2 million in 2022, up 15 percent from 2021. Bilateral trade relations are friendly and demand for U.S. agricultural exports is growing. According to TDM statistics, despite the ongoing challenges such as strong U.S. dollar, supply chain disturbances, the war in Ukraine, U.S. food and agricultural trade to Bulgaria from January to September 2023 raised by nearly 20 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.

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. Given the upward agricultural trade and the fact that the food processing sector did not suffer serious damage from the COVID-19 pandemic, it fully recovered in 2023. For more information about the Bulgarian food processing sector, please refer to FAS Sofia’s [Food Processing Ingredients](#) report.

Food Retail Sector

Total 2022 number of grocery retail outlets in Bulgaria was 38,628, down 0.9 percent from 2021, of which 3,406 were modern trade grocery outlets¹. According to Euromonitor, modern-retail sales in 2022 reached BGN 8.18 billion (\$4.5 billion) and accounted for 63 percent of market share. The remaining 37 percent, or BGN 4.82 billion (\$2.6 billion), was held by 35,222 traditional grocery outlets throughout the country.

¹ Modern retailing is characterized by large stores, centralized buying, and sophisticated supply chain management. Traditional retail refers to the conventional method of retailing where small shops or stores are operated independently by individual owners.

The Bulgarian retail industry has been resilient despite a number of factors including COVID-19, rapidly rising inflation, and the war in Ukraine. In 2022, the revenues of all the largest grocery retail chains in Bulgaria increased by as much as 27 percent compared to 2021. The top five grocery retail chains generated nearly 55 percent of the total grocery retail channel sales. In 2022, inflation grew rapidly by an average of 15.3 percent over 2021. The most significant increase of up to 26 percent was in food and beverages, which contributed to the higher retail revenues.

FAS Sofia expects that in the next few years the food retail industry will continue to adapt to changes in demand and will slightly expand its presence in the market, particularly in the modern trade segment. For more information about the retail market, please see FAS Sofia'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 had developed dynamically with tourism and shopping malls being the main drivers. Bulgaria's HRI foodservice industry grew year-on-year until February 2020. The industry was severely hit by the COVID-19 pandemic with a nearly 45 percent drop in food service sales at restaurants and hotels as the outlets closed, tourism halted, and public outings were reduced.

The Government of Bulgaria (GOB) introduced a tax relief measure to help the food service industry. The measure was initially set to expire on December 31, 2023, but was extended until December 31, 2024. Bulgaria's value added tax (VAT) was reduced from 20 percent to 9 percent for restaurant and catering services (alcoholic beverages were excluded from this measure).

In 2022, the summer tourism season reached 95 percent of the pre-pandemic 2019 summer season. Despite the war in Ukraine and the lack of tourists from Russia, Ukraine, and Belarus, the winter tourism season in 2022 registered 23 percent growth over 2019 and 24 percent increase compared to the winter of 2021. Data for 2023 summer season shows 10 percent increase over the summer of 2022 and 4.9 percent growth compared to 2019. The 2023 winter season started well in December and is expected to be strong, depending on weather conditions. The major problems that Bulgaria's HRI industry faced in 2022 were the war in Ukraine, growing inflation, decreasing consumers' purchasing power, and supply chain disturbances. FAS Sofia expects that the industry will keep the upward recovery trend and by the end of 2024 will exceed the pre-pandemic 2019 levels. For more information about the Bulgarian HRI food sectors, please see FAS Sofia's latest [HRI report](#).

Organic Foods Sector

The Bulgarian organic market continued to expand in 2022 with an estimated annual growth of 3.2 percent compared to 2021. The main driver behind the growth was the strong consumer focus on a healthier lifestyle and the perception that organic products are healthy and higher quality compared to conventional products. An improved summer tourist season and fully functioning food service industry supported the increase in sales. On the other hand, accelerated food inflation began affecting higher-end organic product sales and forcing more marketing efforts to sustain them. Demand growth is expected to continue in 2023, however, at a slower rate due to economic challenges and stagnated disposable income. The domestic organic sector continued to shrink in 2021 and 2022 with further decline in land under organic production and the number of operators. At the end of 2021, organic land area decreased by 26 percent compared to 2020 and accounted for only 1.7 percent of Bulgaria's total agricultural area.

Imported organic, high-value consumer products dominated with estimated over 60 percent market share. Imported organic products are trusted for being genuinely organic. An 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

Despite the Russian invasion of Ukraine and supply chain disturbances in 2022, Bulgaria’s imports of consumer-oriented products kept growing. Their imports for the first nine months of 2023 also increased by nearly 20 percent.

Table 4. Best Consumer Oriented Product Prospects

Product	2022 Imports	Import Tariff Rate	Constraints Over Market Development	Market Attractiveness for U.S.
	(\$ millions)			
Grape Wines	40.46	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 in 2022 account for about 17.5 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 200811 - 200819 and HS 1202)	97.43	From 0 to 12.8 percent depending on type. Exact information is available in the EU official Journal . (Chapter 8 for HS 0802; Chapter 20 for HS 2008; Chapter 12 for HS 1202)	Poland, Spain, Turkey, and Greece for tree nuts and Argentina, Turkey, Nicaragua, and China for ground nuts are the main competitors to U.S. exporters in Bulgaria.	U.S. almonds and pistachios are dominant in the Bulgarian market. For more information, see FAS Sofia’s Tree Nuts Annual report here .
Distilled Spirits (HS 2208)	145.68	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	191.45	Varies by type. Detailed	Strong competition from other exporters	U.S. food preparations can successfully increase their

(HS 2106)		information on food preparations tariffs can be found in the official EU Journal in pages 173-174.	(mainly from the EU).	market share through marketing campaigns, due to the high quality of the products.
Beef and Beef Products	53.29	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 is growing. FAS Sofia works on creating positive perception about U.S. beef by educating the main buyers (HRI and retailers) about its quality and diversified tastes.
Fish Products	159.41	EU seafood tariffs range from zero to 23 percent. More detailed information on seafood tariffs can be found in the official EU Journal in Chapter 3 (pages 47-69) and Chapter 16 (pages 137-139).	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 seafood 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, Norway, Morocco, Ecuador, China. For more information see FAS Sofia's Fish and Seafood Market brief report here .

Source: FAS 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 (FAS Sofia).

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Attachments:

No Attachments.