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Report Name: Fish and Seafood Market Brief Bulgaria

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Report Highlights:

Bulgarian fish and seafood importers are seeking to expand the variety of locally available fish, particularly among the mid and high-value categories. According to the Bulgarian National Statistical Institute (NSI), which measures trade data based on country of origin, and therefore captures U.S. trade routed through other European ports of entry, Bulgaria imported \$166,000 of U.S. fish and seafood in 2021, up 29 percent from the difficult 2020, but significantly lower than the pre-COVID levels of \$554,656 in 2019. This trade consisted mainly of frozen Pacific salmon, smoked trout, lobsters, shrimps, and scallops. 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:

COVID-19 Impact: Bulgaria's Hotel, Restaurant, and Institutional (HRI) food service industry grew year-on-year until early 2020. However, the industry, which is a significant driver of fish consumption, was the most severely hit by the COVID-19 pandemic. Food service sales have decreased significantly as the outlets have closed, tourism has halted, and the HRI sales dropped by over 40 percent as compared to 2019. This significantly decreased demand for fish and seafood products as well, as restaurants account for nearly half of the consumption. In 2021, Bulgaria's HRI and tourism enjoyed strong summer and winter tourist seasons and registered up to 50 percent growth over the same period in 2020. In 2022, the summer season reached nearly 90 percent of the 2019 summer season tourism. Despite the war in Ukraine and the lack of tourists from Russia, Ukraine, and Belarus, the preliminary data for the 2022 winter tourism season is very good and the food service operators at winter resorts are expected to compensate for losses from the pandemic years. Post forecasts that the HRI industry will return to pre-COVID levels by the end of 2023.

In 2020, the domestic catch of fish and other aquatic organisms dropped by 39 percent as compared to 2019. The main reason for this decrease were the restrictive COVID-19 measures that disrupted supply chains and led to a significant drop in demand for fish and seafood products, and consequently, a reduction in the catch of fish and other aquatic organisms in the Black Sea.

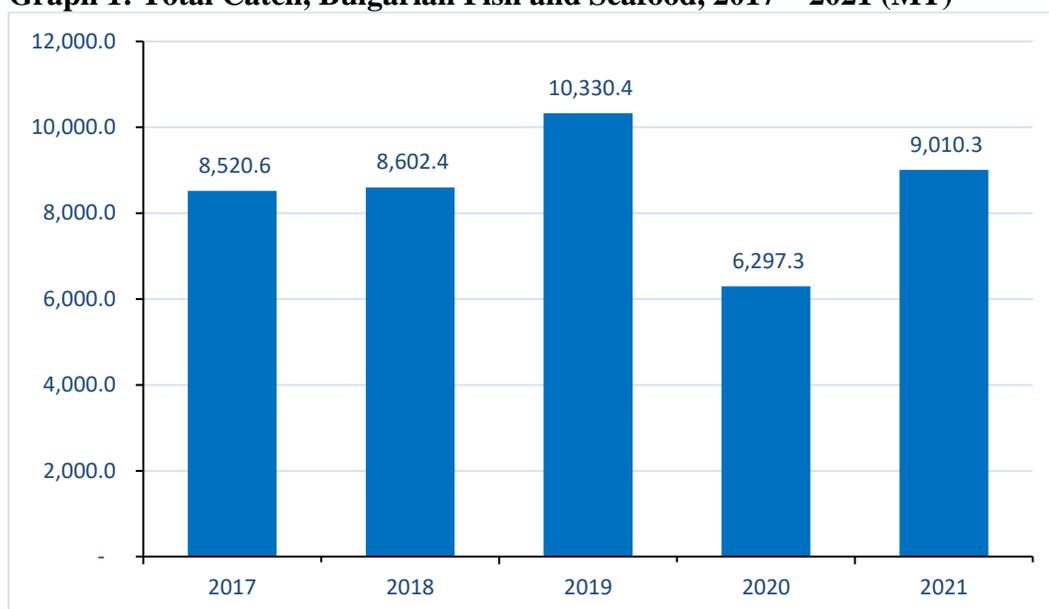
Although Bulgarian consumers do not typically eat many fish and seafood products at home, with annual at-home consumption slightly above six kilograms per capita (not including restaurants), there are good opportunities for U.S. suppliers in the HRI sectors. An increasing number of international suppliers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

HRI and retail will both 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 determined by international market prices.

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 salmon, lobster, hake, mackerel, squid, shrimp and prawn, trout, tuna, and catfish. Opportunities also exist to supply the Bulgarian fish and seafood-processing sector, which adds value and sells products throughout the EU. As a result of the war in Ukraine, most of the seafood processing facilities in Ukraine have ceased operation, creating demand for processing capacities elsewhere. There are several processing facilities in Bulgaria that could respond to this demand from potential U.S. exporters.

According to official statistics, the total 2021 domestic catch increased by more than 43 percent to 9,010 metric tons (MT) from 6,297 MT in 2020. 8,920 MT was harvested from the Black Sea and 90 MT from the Danube River.

Graph 1: Total Catch, Bulgarian Fish and Seafood, 2017 – 2021 (MT)



Source: Bulgarian Executive Agency for Fisheries and Aquaculture

Table 1. Bulgarian Fish and Seafood Production 2021 (MT)

Description	Quantity
Fish fillets and other fish meat (whether or not minced), fresh or chilled	414.9
Fish, frozen	5,138.2
Fish fillets, frozen	961.5
Fish, dried, whether or not salted, or in brine	722.1
Fish, including fillets, smoked	364.4
Fish, otherwise prepared or preserved, except prepared fish dishes	6,593.5
Mollusks, frozen, dried, salted or in brine	471.9
Other aquatic invertebrates and seaweed, frozen, dried, salted or in brine	746.3
Crustaceans, mollusks and other aquatic invertebrates and seaweed, otherwise prepared or preserved	2,083.7
Other inedible products of fish, crustaceans, mollusks or other aquatic invertebrates or seaweed	400.2

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 2021, the Black Sea catch increased by 43 percent over 2020. Nearly 40 percent of all catch was European sprat, followed by anchovy (13 percent), red mullet (5 percent), blue fish (3 percent), Black Sea horse mackerel (3 percent), turbot, and goby. Conch traditionally accounts for the highest percentage of the Black Sea shellfish catch with about 24 percent of all Black Sea catch. In 2021, the conch catch was 2,166 MT, a 21 percent decrease over 2020. The soft-shell clam catch reached 758 MT, a 64 percent increase.

Table 2. Black Sea Catch by Species 2020 and 2021

Specie	MT		Change 2020/2021
	2020	2021	
European Sprat	1,623	3,479	114%
Shellfish (Conch, Mussel, Clam, Shrimp)	2,795	3,024	8%
Anchovy	422.2	1,176.7	179%
Red Mullet	319.3	445.4	39%
Bluefish	253.2	302.1	19%
Black Sea Horse Mackerel	108.8	274.1	152%
Turbot	61.6	70.4	14%
Goby	33.7	32.4	-4%
Spiny Dogfish	47.5	19.7	-59%
Other species	563.8	96.6	-83%
Total Black Sea Catch	6,228.1	8,920.4	43.2%

Source: Bulgarian Executive Agency for Fisheries and Aquaculture

Freshwater Fisheries

Bulgaria has over 200,000 HA of lakes, reservoirs, and rivers, which account for 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 2021 reached 90 MT, a nearly 30 percent increase from 2020. The Danube catch in 2021 consisted mainly of Prussian carp (16 percent), Crucian carp (15 percent), carp (13 percent), common barbel (9 percent), common carp (7 percent), common bream (7 percent), and Wels catfish (6 percent).

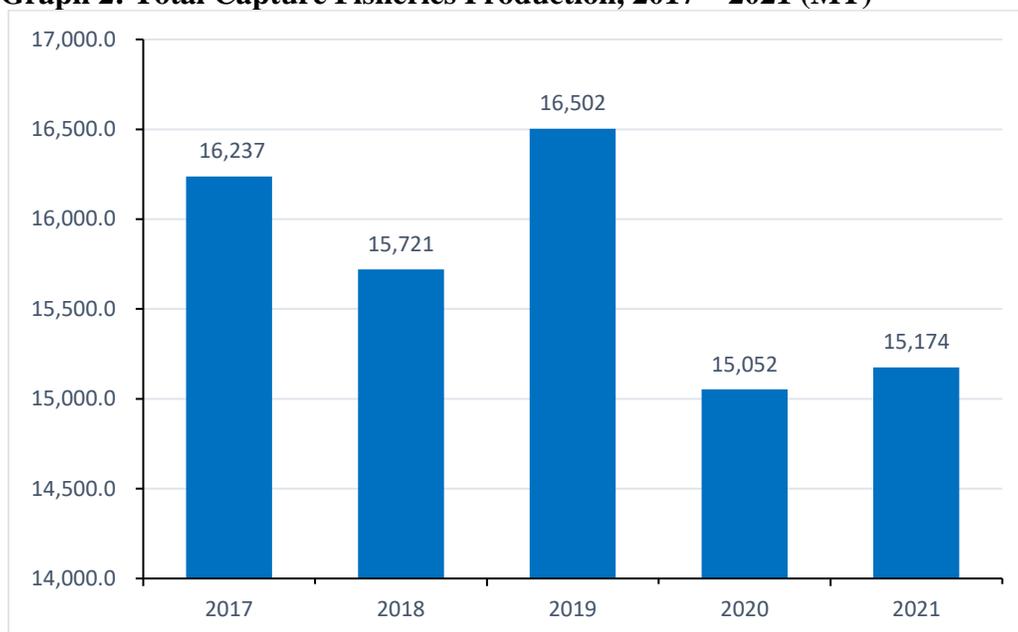
In 2012, the Ministry of Agriculture and Food banned fishing, transporting, and the sale of sturgeon and product derived from sturgeon. The ban aims to protect and preserve the Danube's sturgeon population as it is considered as one of the most endangered species. In 2020, the ban was extended for another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

Aquaculture

Total 2021 aquaculture production (breeding material, fish, and seafood) increased by almost 1 percent over the previous year (15,174 MT) but is still lower than the pre-pandemic years. Total 2021 production of breeding material increased by 7 percent, to 2,201 MT.

In 2021, the total capture of fish (12,973 MT) was mostly rainbow trout (4,536 MT), carp (3,199 MT), black mussel (2,574), and bighead carp (1,224 MT).

Graph 2: Total Capture Fisheries Production, 2017 – 2021 (MT)



Source: Bulgarian Executive Agency for Fisheries and Aquaculture

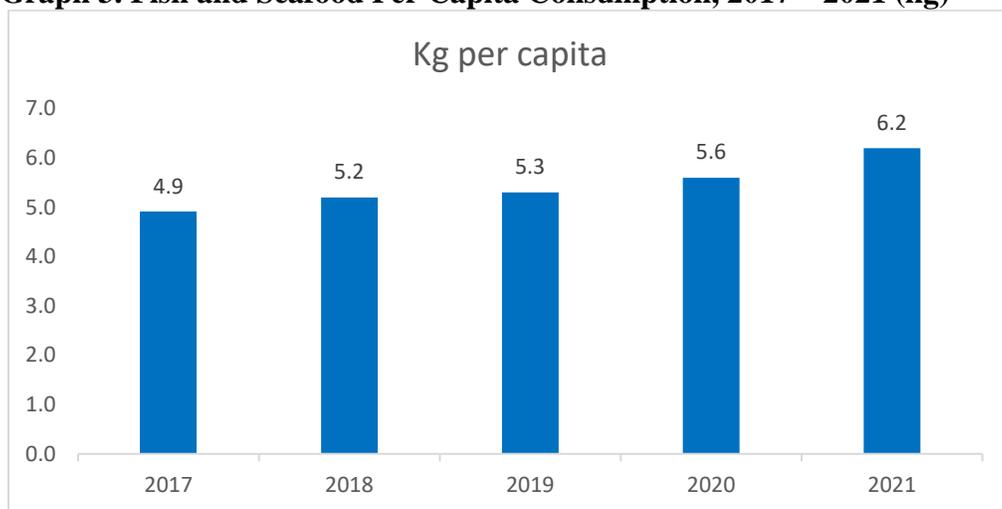
Production of other local species is insignificant and is mainly Prussian carp, grass carp, common carp, and African sharp tooth catfish. Recently, diversification of the produced species has included sturgeon species. The main marine aquaculture specie is black mussel. In 2021, black mussel production increased by 20 percent as compared to the previous year to 2,574 MT.

According to the Ministry of Agriculture and Food and the [Bulgarian Executive Agency for Fisheries and Aquaculture](#) (BEAFA), as of September 2022 there are 718 active aquaculture farms in Bulgaria. The number of aquaculture businesses is likely to increase 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.

Consumption

Per capita fish consumption in Bulgaria is below the EU average. According to data from the NSI, per capita household fish consumption in 2021 was 6.2 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 five years and industry forecasts indicate that it will keep growing, due to rising consumer incomes and the growing demand for healthier food, despite increasing wholesale and retail prices for fish and fishery products.

Graph 3. Fish and Seafood Per Capita Consumption, 2017 – 2021 (kg)



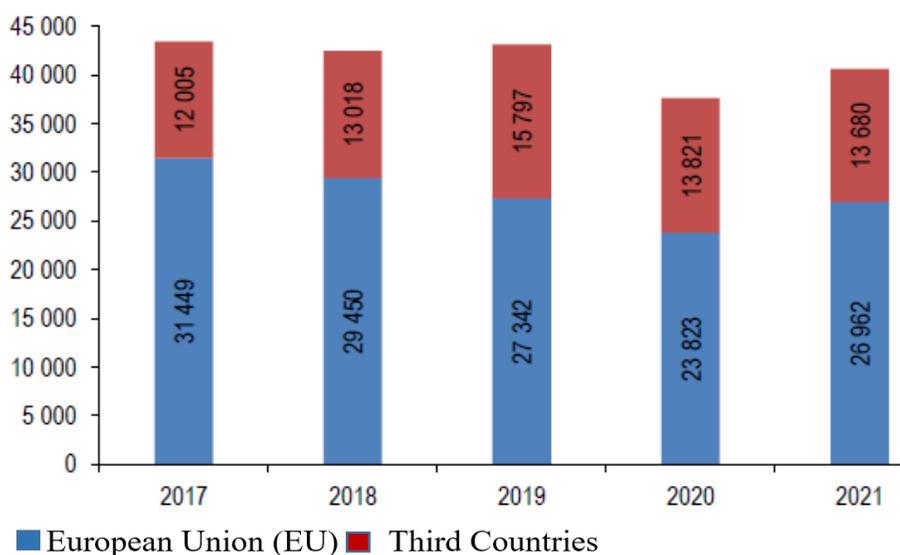
Source: Bulgarian NSI, (Note: does not include restaurant consumption)

Import of Fish and Seafood Products

According to NSI data, total imports of fish and fishery products in Bulgaria in 2021 was 40,643 MT, an 8 percent increase over 2020 due to increased supplies of fresh, chilled, and frozen fish, fish filets, salted and dried fish, crustaceans, and mollusks. Imports of live fish, aquatic invertebrates, and canned fish slightly decreased.

About two thirds (26,962 MT) of imported fish in 2021 came from other EU countries and marketed a 13 percent increase from 2020. 2021 imports mainly came from Spain (4,500 MT), the Netherlands (4,500 MT), Greece (3,700 MT), Denmark (3,700 MT), Romania (2,400 MT), and Poland (1,800 MT). Non-EU imports slightly decreased from 2020 at 13,680 MT. Main trading partners were Canada (2,800 MT), Norway (2,500 MT), Turkey (1,600 MT), Morocco (1,600 MT), and Iceland (1,200 MT).

Graph 4: EU and Non-EU Fish and Seafood Imports, 2017-2021 (MT)



Source: Bulgarian NSI

Frozen fish, excluding fillets, accounted for 40 percent of total fish and seafood imports in 2021 at 16,261 MT, up 10.7 percent from 2020. As in previous years, imports by species were dominated by frozen mackerel at 9,418 MT, up 12.5 percent from 2020. Due to a lack of mackerel in Bulgaria, the frozen mackerel imports satisfy market demand for direct consumption and that of the processing industry.

2021 imports of the following species were relatively large: sardines (1,357 MT), European hake (1,067 MT), herring (633 MT), cod (499 MT), salmon (154 MT), horse mackerel (257 MT), and trout (232 MT). According to the NSI data, 2021 Bulgarian imports of fish and seafood from the United States increased by 29.3 percent and mainly consisted of frozen Pacific salmon, smoked trout, lobsters, shrimps and prawns, scallops, and other mollusks.

There have been large annual increases of imports of canned crustaceans and mollusks by nearly 24 percent; fillets of fish and mollusks by about 21 percent; and more moderately of fresh, chilled, and frozen fish, dried and salted fish and crustaceans by six and 10 percent. The total import of water invertebrate, other than crustaceans and mollusks decreased by 39 percent in 2021 as compared to 2020.

Table 3: Fish and Product Imports by Type, 2020 – 2021 (MT)

Product	2020	2021	Change
			2020/2021
Live fish - fresh water and marine	450	407	-9.7%
Fish - fresh and chilled, excluding fillet	6,204	6,784	9.4%
Fish - frozen, excluding fillet	14,690	16,261	10.7%
Fillet and other fish meat - fresh, chilled, or frozen	2,422	2,924	20.7%
Fish - dried, salted, smoked	404	442	9.6%
Crustaceans	4,891	5,189	6.1%
Mollusks	2,300	2,789	21.2%
Water invertebrate, other than crustaceans and mollusks	1,462	890	-39.1%
Ready food, caviar, fish cans	3,987	3,925	-1.6%
Canned crustaceans and mollusks	834	1,032	23.8%
Total fish and other water organisms and fishery products	37,644	40,643	8.0%

Source: Bulgarian NSI Data, Through Ministry of Agriculture and Food's Agrarian Report 2022

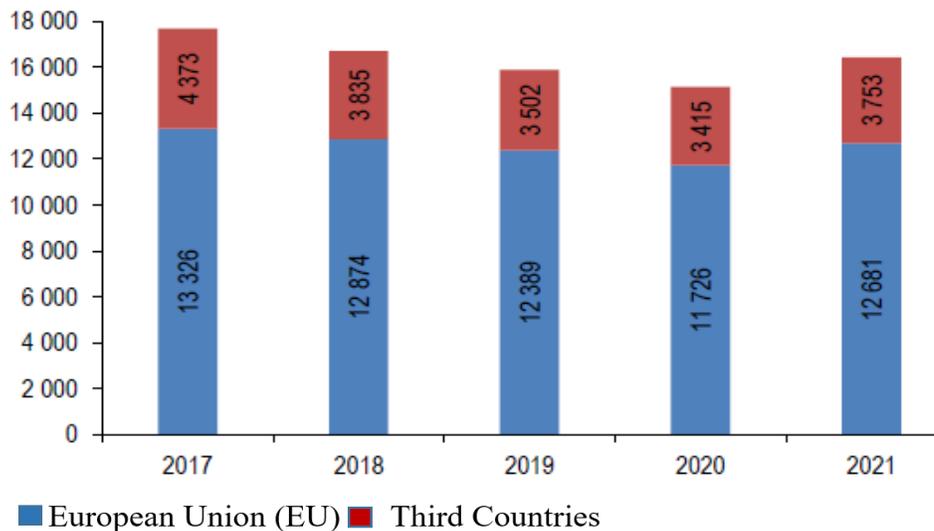
According to preliminary NSI data, imports of fish, other aquatic organisms and processed fish products surged by 7 percent in the first six months of 2022. There was an increase in supplies both from the EU and non-EU countries, respectively by 7.3 percent and by 7.4 percent.

Exports of Fish and Seafood Products

According to Bulgarian NSI data, total 2021 Bulgarian exports of fish and seafood products was 16,435 MT, an increase of 8.5 percent over 2020. This increase was mainly due to increased export of frozen, dried, and salted fish. Within the EU, exports grew by 8.1 percent to 12,681 MT, 77 percent of total exports in 2021. Primary markets were Romania (6,400 MT), Sweden (2,700 MT), Spain (900 MT),

Poland (700 MT), and Belgium (600 MT). 2021 exports to non-EU markets also increased by 9.9 percent to 3,753 MT and were mainly to Serbia (1,615 MT), Japan (602 MT), the Republic of Korea (544 MT), Bosnia and Herzegovina (316 MT), United Kingdom (179 MT), and North Macedonia (153 MT).

Graph 5: EU and Non-EU Fish and Products Exports (MT), 2017-2021



Source: Bulgarian NSI

In 2021, exports of frozen, dried, salted, and smoked fish, and crustaceans increased notably while exports of water invertebrate, other than crustaceans and mollusks were down by almost 60 percent over 2020.

Table 4: Fish and Product Exports by Type, 2020 –2021 (MT)

Product	2020	2021	Change
			2020/2021
Live fish - fresh water and marine	1,237	1,257	1.7%
Fish - fresh and chilled, excluding fillet	2,742	2,929	6.8%
Fish - frozen, excluding fillet	1,236	2,040	65%
Fillet and other fish meat - fresh, chilled, or frozen	639	537	-16%
Fish - dried, salted, smoked	667	1,177	76.5%
Crustaceans	39	99	156.2%
Mollusks	2,025	2,000	-1.3%
Water invertebrate, other than crustaceans and mollusks	91	37	-59.1%
Ready food, caviar, fish cans	3,624	3,440	-5.1%
Canned crustaceans and mollusks	2,841	2,920	2.8%
Total fish and other water organisms and fishery products	15,141	16,435	8.5%

Source: Bulgarian NSI Data, Through Ministry of Agriculture and Food's Agrarian Report 2022

According to preliminary NSI data, exports of aquatic organisms and processed fish products decreased slightly by 1.4 percent in the first half of 2022. Exports destined for the EU increased by nearly 3 percent, while that for third countries dropped by 15 percent.

EU Common Fisheries Policy

Bulgaria's fish and seafood industry follows the EU [Common Fisheries Policy](#) (CFP). The CFP is a set of rules for sustainably managing European fishing fleets and for conserving fish stocks. Designed to manage a common resource, it gives all European fishing fleets equal access to EU waters and fishing grounds and allows anglers to compete fairly.

While stocks may be renewable, but they are finite; some of the EU's fishing stocks are being overfished. As a result, EU countries seek to ensure the European fishing industry is sustainable and does not threaten the fish population and productivity over the long term.

The CFP was first introduced in the 1970s and went through successive updates, the [most recent](#) of which took effect on January 1, 2014. The CFP aims to ensure that fishing and aquaculture are environmentally, economically, and socially sustainable, and that they provide a source of healthy food for EU citizens. Its goal is to foster a dynamic fishing industry and ensure a fair standard of living for fishing communities. The CFP has policy areas such as Fisheries Management, International Policy, Market and Trade Policy, and Policy Funding. It also includes rules on [aquaculture](#) and stakeholder involvement. The 2022 Facts and Figures on the CFP brochure can be downloaded from [here](#). It provides detailed information about fishing fleets, aquaculture, trade, EU environmental, economic, and sustainability initiatives through facts and figures.

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 52-73) [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.