

KEY INDICATORS

With 110,441 hectares, Bulgaria had 2.2% of its farmland under organic management in 2022. Like in many countries that became a member of the European Union in or after 2004, growth was exceptional, amounting to 20,000% in the 2001 to 2022 period, thus showing the second-highest area growth in the European Union (after Croatia). Regarding organic retail sales, a turnover of 38 million euros was noted, with an organic share of 1%, thus below the EU average.



ORGANIC FARMLAND

2001

2022

Area* (Share of Total Farmland)

539 ha

110,441 ha (2.2%)

Area Growth from 2001 to 2022

20,390%



ORGANIC LAND USE & AQUACULTURE

2001

2022

Arable Land* (Share of Total)

N/D

57,992 ha (1.7%)

Permanent Crops* (Share of Total)

N/D

22,593 ha (14.9%)

Grassland* (Share of Total)

N/D

29,856 ha (2.1%)

Aquaculture Production (Share of Total)

N/D

1,600 † (18.1%)



ORGANIC OPERATORS

2001

2022

Producers (Share of Total)

50 (0.01%)

4,260 (3.2%)

Aquaculture Producers

N/D

1

Processors

N/D

386

Importers

N/D

101



ORGANIC RETAIL SALES

2001

2022

Retail Sales (Share of Total)

N/D

38 M€ (1%)

Per Capita Consumption

N/D

5.9 €

Retail Sales Growth from 2001 to 2022

N/D

Imports

N/D

9,218 †

Source: FiBL survey based on national data sources, Eurostat and TRACES/European Commission in the framework of the OrganicTargets4EU project

*In conversion and fully organic



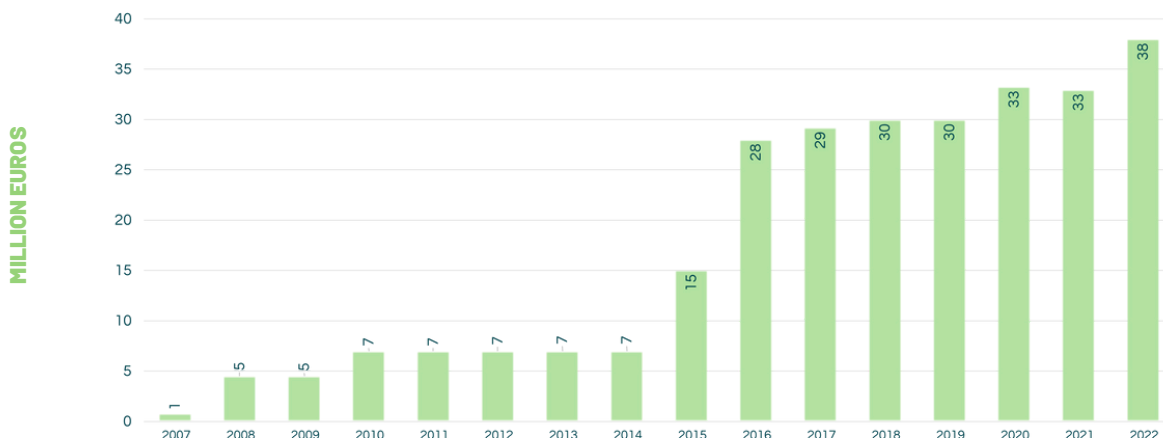
KEY INDICATORS

DEVELOPMENT OF ORGANIC FARMLAND IN BULGARIA



Source: FiBL-AMI Survey, Eurostat, Bioselena, Nic Lampkin

ORGANIC RETAIL SALES GROWTH IN BULGARIA



Source: FAS/USDA

CAP ORGANIC POLICY SUPPORT

The Bulgarian CAP strategic plan provides for a near trebling in supported organic area and expenditure by 2027, compared with 2018. Grassland and arable payments per hectare are also increased, while payments for permanent crops are capped at similar levels. Conversion payments in 2023-2027 are 24% higher than maintenance, a reduction compared with the previous period



CONVERSION & MAINTENANCE

2018

2027

Land Area Supported (Change from 2018)*	68 kha	202 kha (+195%)
Share of Total Agricultural Area Supported*	1.4 %	4.0% (+195%)
Share of Certified Organic Area Supported (Change)*	53%	N/D
Expenditure per Year*	24 M€	118 M€ (+388%)
Expenditure per Hectare Supported*	354 €	585 € (+65%)



SHARE OF CAP RESOURCES

CAP EXP. 2023-2027 ORGANIC SHARE*

Organic Farming Support (P1/P2)*	407 M€	100%
Eco-Schemes (P1)	1,027 M€	
Agri-Environment, Climate, Welfare (P2)	774 M€	22.6%
Total CAP Expenditure	7,726 M€	5.3%

*including in-conversion and fully organic land

CAP ORGANIC CONVERSION AND MAINTENANCE PAYMENTS FOR DIFFERENT LAND USES

INDICATOR	YEAR	FUND	GRASSLAND	ARABLE CROPS	HORTICULTURE	FRUIT CROPS	GRAPES	OLIVES
Conversion Support (€/ha)	2019	P2	128-358	284	575	736	736	736
	2023	P1/P2	358	693	693	693	693	693
Change from 2019 to 2023			0%	144%	21%	-6%	-6%	-6%
Maintenance Support (€/ha)	2019	P2	128-218	167	399	557	557	557
	2023	P1/P2	358	557	557	557	557	557
Change from 2019 to 2023			74%	232%	40%	0%	0%	0%
Conversion Support Higher than Maintenance	2019		64%	70%	44%	32%	32%	32%
	2023		0%	24%	24%	24%	24%	24%

P1 (Pillar 1) European Agricultural Guarantee Fund (EAGF); P2 (Pillar 2) European Agricultural Fund for Rural Development (EAFRD) and national co-financing - P1 used for livestock

Sources for pages 3 and 4

Lampkin N, Lembo G, Rehburg P (2024) *Assessment of agricultural and aquaculture policy responses to the organic F2F targets*. OrganicTargets4EU project Deliverable 1.2. Braunschweig: Thünen-Institut.
Lampkin N, Sanders, J (2022) *Policy support for organic farming in the European Union 2010-2020*. Thünen Working Paper 200. Braunschweig: Thünen-Institut.

NATIONAL ORGANIC ACTION PLAN

The previous action plan (2007-2013) was Bulgaria's first. The near final draft of the latest Bulgarian national OAP contains no specific land area or market targets, and reduced activity compared with the previous plan, representing a weakening of policy support.

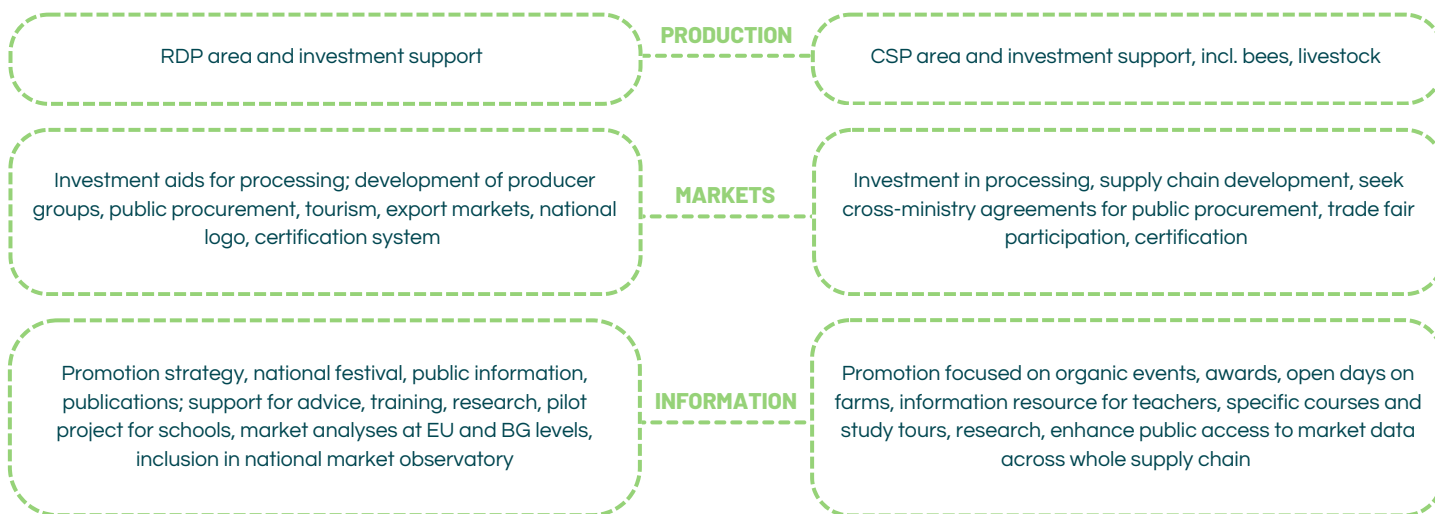
TARGETS

	PERIOD	LAND AREA TARGET*	OTHER TARGETS
Previous Action Plan	2007-13	8% of total UAA by 2013	3% of retail sales by 2013
Current Action Plan	2024-30	N/D	'organic for all'

KEY ACTIONS

PREVIOUS ACTION PLAN (2007-2013)

CURRENT ACTION PLAN (2024-2030)



AQUACULTURE

The organic share of total aquaculture production in Bulgaria is 20%. Bulgaria was not included in our analysis of the EMFF (2014-2020) and EMFAF (2021-2027) operational programmes and the Multi-annual National Strategic Plan for Aquaculture, but financial support for organic aquaculture certification is referred to in the draft action plan from 2024. As the funding is project specific and there is no ring-fenced organic budget, statistics on organic aquaculture support expenditure are not available.