

## KEY INDICATORS

With 198,051 hectares, Bulgaria had 3.92% of its farmland under organic management in 2024. 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 2024 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

2024

**Area\* (Share of Total Farmland)**

539 ha

198,051 ha (3.92%)

**Area Growth from 2001 to 2024**

36,644%



### ORGANIC LAND USE & AQUACULTURE

2001

2024

**Arable Land\* (Share of Total)**

N/D

80,919 ha (1.7%)

**Permanent Crops\* (Share of Total)**

N/D

23,023 ha (14.9%)

**Grassland\* (Share of Total)**

N/D

94,111 ha (2.1%)

**Aquaculture Production (Share of Total)**

N/D

1,600 t (18.1%) (2022)



### ORGANIC OPERATORS

2001

2024

**Producers (Share of Total)**

50 (0.01%)

4,978 (3.8%)

**Aquaculture Producers**

N/D

1

**Processors**

N/D

391

**Importers**

N/D

114



### ORGANIC RETAIL SALES

2001

2024

**Retail Sales (Share of Total)**

N/D

38 M€ (1%) (2022)

**Per Capita Consumption**

N/D

5.9 €

**Retail Sales Growth from 2001 to 2024**

N/D

**Imports**

N/D

6,202 t

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



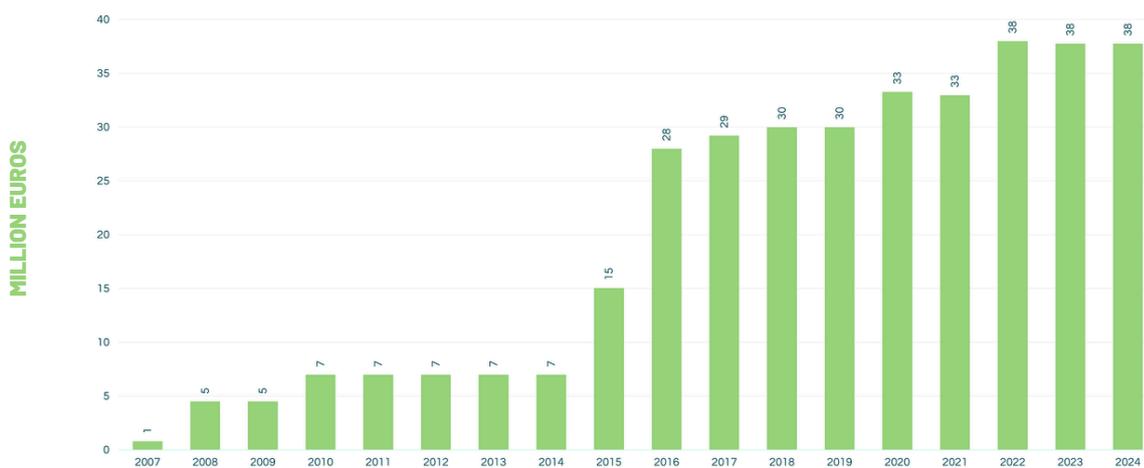
## KEY INDICATORS

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



### SHARE OF CAP RESOURCES

### CAP EXP. 2023-2027 ORGANIC SHARE\*

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

\*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	BEES**
<b>Conversion Support (€/ha)</b>	2019	P2	128***	284	575	736	736	35
	2024*	P1/P2	166-182***	231-371	445-1173	787-1563	931-1448	35
<b>Change from 2019 to 2024*</b>			max 42%	max 31%	max 104%	max 112%	max 97%	0%
<b>Maintenance Support (€/ha)</b>	2019	P2	128***	167	399	557	557	25
	2024*	P1/P2	145-159***	185-297	384-974	647-1285	765-1190	28
<b>Change from 2019 to 2024*</b>			max 24%	max 78%	max 144%	max 131%	max 114%	12%
<b>Conversion Support Higher than Maintenance</b>	2019		64%	70%	44%	32%	32%	40%
	2024		14%	25%	max 20%	22%	max 25%	25%

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

\*Degressive payments over 50ha hortic./fruit crops and 200ha arable and fodder crops

\*\*Bee payments in bands, typical values per hive, maximum per farm with >500 hives, €21,326 conversion, €16,893 maintenance

\*\*\*Plus supplementary payment for livestock, e.g. from 2026: €516/ha for 0.3-1 LU/ha for three years

## NATIONAL ORGANIC ACTION PLAN

The previous action plan (2007-2013) was Bulgaria's first. A plan for 2014-2020 was prepared but not implemented. The current plan was approved in 2025. Roses and bees are important, with 230,000 bee colonies organic in 2025. 18% of school milk/fruit was organic in 2025.

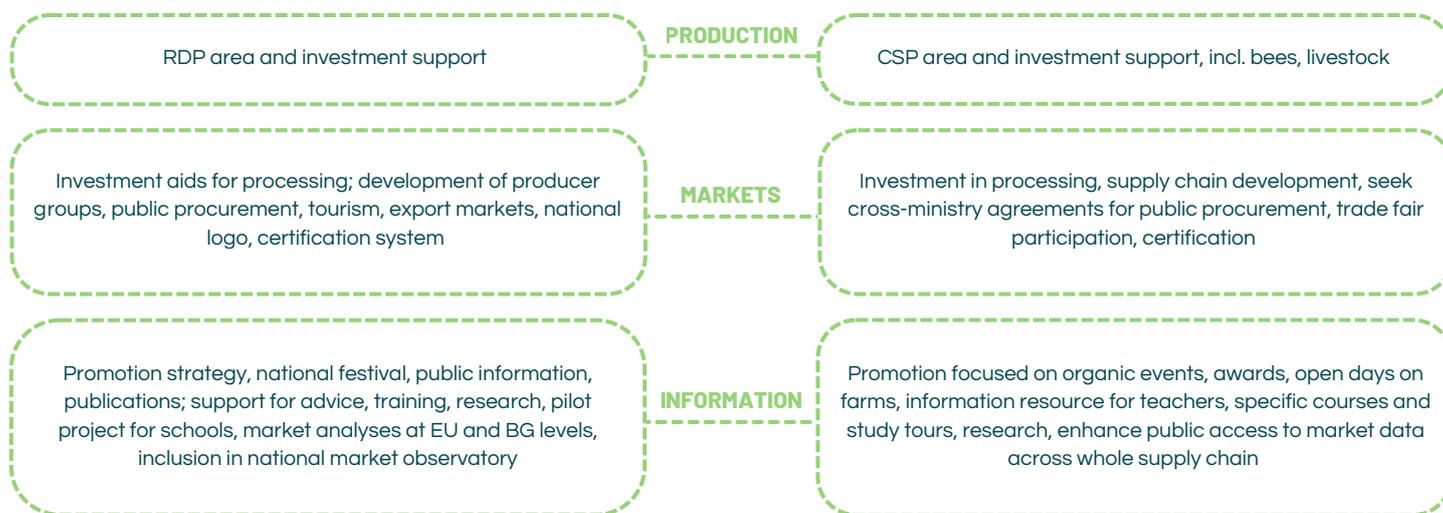
### TARGETS

	PERIOD	LAND AREA TARGET*	OTHER TARGETS
<b>Previous Action Plan</b>	2007-13	8% of total UAA by 2013	3% of retail sales by 2013
<b>Current Action Plan</b>	2025-30	7% of total UAA by 2027	300,000 bee colonies by 2027 Public procurement 2% by 2024 increasing to 10% by 2032

### KEY ACTIONS

#### PREVIOUS ACTION PLAN (2007-2013)

#### CURRENT ACTION PLAN (2025-2030)



### 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.

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