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## **Bulgaria**

### **Retail Food Sector**

### **Retail Food Sector in Bulgaria**

## **2003**

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#### **Report Highlights:**

**The Bulgarian retail food sector has developed over the last two years due to gradually increasing consumer income and development of the food processing sectors. In 2003, local food sales are estimated to total \$2.0 billion. Further expansion is expected in 2004/05. The growth in this sector will be highly related, however, to the trends in disposable consumer income.**

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## Summary

Over the past 10 years, the retail sector in Bulgaria has undergone significant structural changes and growth. For the period 1990-2002, the number of retail outlets has tripled. After the economic crisis in 1997, the market situation quickly changed. Hypermarkets and supermarkets began to emerge in 1997-1998, and they expended their market share significantly in 1999-2002. The growth in the number of retail outlets for the period 1997-2001 was 14 percent. The growth for the period in 2003 compared to 2001 is expected to be 8 percent.

**Table #1. Total Number of Food Retail Outlets**

Total Number of Food Retail Outlets					
Year	1990	1995	1997	1999	2001
Number	15,097	44,276	41,465	44,134	47,405
Source: Noema Ltd. research 2002					

Total food retail sector sales in 2001 are estimated at \$1.82 billion which is a growth of 4 percent compared to 1999; in 2002, the sales grew with one percent. The expectations for 2003 sales compared to 2002 are for **growth of 8 percent, which will raise total** food sales to approximately \$2.0 billion.

Currently, hypermarkets and supermarkets are located only in big cities and larger population centers. Supermarkets are typical for major towns. Often they are not a part of a chain. Groceries are most typical for smaller towns. Both big cities and smaller towns have open farmer markets. Villages usually have only so called "mixed" shops which offer food and non-food items, often along with a small food service outlet. Villages do not have open farmer markets or groceries.

**Table # 2. Retail Outlets Market Share in 2001 year**

Retail Outlets Market Share in 2001, in percent	
Groceries	54
Hypermarkets/ supermarkets	23
Kiosks	13
Other	10
Source: Noema Ltd. research 2002	

The development of the **three sub-sectors (A/ hypermarkets, supermarkets, warehouses and wholesale markets; B/groceries, specialty stores, convenience stores, mixed shops, kiosks, gas marts; C/open markets)** is **uneven** in the recent years. Over the past three years, the most intensive was the development of the subsector A.

- The number of hypermarkets and supermarkets is small, 0.3 percent of total food retail outlets. However, their market share is 23 percent **in 2001** of total food retail sales. In 1999, there were 4 hypermarkets and 72 supermarkets; in 2001 their number increased to 20 hypermarkets and 140 supermarkets, which is a growth of 400 percent for hypermarkets and 94 percent for supermarkets. The growth in sales for the same period was 327 percent for hypermarkets and 117 percent for supermarkets. In 2003, the growth in the number of outlets is expected to continue with at an estimated rate of 75 **percent compared to 2001**. The expansion of the subsector A in 2001/2002 was at the expense of kiosks and specialized shops in subsector B.

The first hypermarket which entered the local market was the German METRO (spring of 1999). It was followed by 3 retail chains, BILLA (Austria), ENA (Greece) and Ramstore (Turkey). Hypermarkets started to influence and change consumer behavior regarding consumer habits and choice. The most appreciated qualities offered by hypermarkets were consistent and good/high quality of food products; high variety of foods; good choice of food and drink brands; attractive prices; good service; light and well equipped premises; and convenient parking lots. A number of food products are offered only and exclusively in selected hypermarkets.

- **Warehouses:** There are a number of food and drink warehouses in the country. Most warehouses acted as wholesalers before the entry of hypermarkets and supermarkets in 1999. Currently, the majority of warehouses continue to play the same role on a regional basis where hypermarkets/supermarkets do not exist. This way they are the main wholesale source for the groceries and "mixed" shops in the respective regions, usually smaller town and villages. Some warehouses make effort to develop by supplying food products different from those sold in hypermarkets (METRO). However, most warehouses are not properly equipped and can not store food for a longer period, and the hygiene and safety standards are considerably lower compared to hypermarkets/supermarkets.

The major source of fruits and vegetables are wholesale markets/warehouses. Currently, there **are four regulated and** professionally managed wholesale markets. They have appropriate cold facilities, and execute quality control and food safety control. These markets handle and store the bulk of imported fruits and vegetables. The largest and the best such market is located in Sofia (Slatina Bulgarplod) and handles about 80 percent of Bulgaria's fruits and vegetable imports. However, these warehouses/cold stores need upgrading and improvement of storage conditions as well as better regulations and efficient grading systems.

- In sub-sector B, so-called minimarkets and groceries account for 53 percent of total number of food retail outlets and have 54 percent market share in food sales. In 2003, the expectations are for a stable level of sales in sub-sector B compared to 2001. Among all retail outlets in subsector B, the most dynamic was the development of the gas station retail outlets. Their number in 2001 grew by 50 percent compared to 1999, from 96 to 144. **Except** for the largest gas station chains such as Shell, OMV, LukOil and Petrol, other smaller gas station chains or independent stations started to open retail outlets in 2000. The growth in other types of retail outlets was modest. In 2001, the number of specialized shops grew slightly by 5 percent, and the number of kiosks grew by 6 percent compared to 1999.
- The traditional open farmer markets, sub sector C, have also developed over the past three years. Open markets accounted for 2.5 percent of total retail food sales in 2001. In 2001/2002, their sales revenue declined 37.5 percent compared to 1999. This reduction came mainly from low sales of foods which were offered in the sub-sectors A and B. However, open markets remain a major source of fresh fruits and vegetables. These sales account for 90-95 percent of total open markets sales. The competition forced these markets to adopt higher hygiene standards and to offer a better variety of services. Price differentiation depending of quality standards and grades became to emerge. Currently, these markets are competitive regarding variety, quality and prices of fresh fruits and vegetables compared to sub-sectors A and B. Open markets differentiate from sub-sectors A and B offering different fruits/vegetables such as wild forest fruits (raspberries, strawberries etc.) and some types of nuts and spices. They also offer a better choice of fruits, for example, 6 to 10 varieties of apples compared to 2-3 varieties offered in an usual outlet in sub-sectors A and B. On the other hand, most open markets are limited on terms of appropriate storage space and warehouses; rely on seasonal sales; do not offer reliable service (for example, mechanical/spring-balance scales which are not always precise compared to electronic scales in groceries and supermarkets/hypermarkets).

The three retail sub-sectors have different consumer profile. According to recently published research of "Market Test" agency, 70 percent of housewives of age 25 to 64 years, shop for food products once weekly. The average value of their weekly shopping is \$25. The preferred choice for weekly shopping are retail outlets not further than 2 kilometers from home. In Sofia, where the population has higher consumer income, housewives shop more often and the average weekly value of their purchase is \$32. The three most valued features for making a choice regarding the retail outlet are: food products prices; food quality; and the variety or the assortment lists.

- The retail outlets in sub-sector A are located in cities and larger towns. A typical consumer of this sector is age 25-35 years; with personal income above \$300 per month; a household of 4 members; household's income above \$600 per month.

- In sub-sector B, consumer profile is very diverse. For example, gas station retail outlets consumers are usually with high personal income, above \$600 per month, living in big cities. "Mixed" shops consumers are pensioners, age 60-65 year, average monthly income of \$40-\$50.
- In sub-sector C, open farmer markets, consumers are typically of age 36-45 years, living in large residential area, with personal income above \$160 per month.

Distribution: Distribution system in the country is at an emerging stage. There are only a few companies which have well developed nationwide distribution. Such companies exist in the sectors of alcohol, soft drinks, meat and meat products. Usually, companies which have nationwide distribution are producers which have developed this distribution system for their own needs. Sometimes, these companies start distributing products manufactured by other producers. The second type of companies which have nationwide distribution are food and beverage importers. However, in most food sub-sectors, distribution companies have mainly a regional coverage.

Infrastructure: Transportation infrastructure in the country has improved over the past three years. Bulgaria has 4 international airports (Sofia, Varna, Burgas and Plovdiv). The highway E-80 connects West and Central Europe with Turkey and the Middle East. There are two major Black Sea ports (Varna and Burgas) which provide access to the Mediterranean. The port of Varna is a cross point for three European corridors/highways - #7,#8 and #9, thus providing terms for transit transportation between West and Central Europe, Near and the Middle East and gives an access to Asia. The port of Burgas currently works with 80 countries and serves about 2,000 vessels annually. The north border of the country is the Danube river which connects Bulgaria with the port of Rotterdam and countries in Central and West Europe. There are 5 major river ports on the Danube (Russe, Silistra, Vidin and Lom). Bulgaria also has 6 duty-free zones which offer exemption from VAT, excise duties, and import duties.

<b>Advantages and Challenges Facing U.S. Food Products in Bulgaria</b>	
<b>Advantages</b>	<b>Challenges</b>
Guaranteed origin of the product.	Relatively low purchasing power
High popularity of U.S. trade marks/brands in Bulgaria (in general).	Still dominating home food manufacturing during the winter period in villages and smaller towns.
Relatively lower and not competitive quality of some Bulgarian foods.	Some U.S. food products are perceived by consumers as not tasty or with unusual, rather "bad" taste.
Sufficient information regarding food ingredients, additives; shelf life and expiration dates.	Some U.S. foods are perceived as containing "artificial" flavor, additives, preservatives and ingredients.
Bulgarian companies do not have sufficient capital for competitive advertising and promotion of their products.	Lack of preferential trade agreement and customs treatments with the U.S. vs. liberal trade regimes the EU and CEFTA countries.
Hypermarkets and supermarket prefer to work directly with importers or food manufacturers	Lack of well developed nationwide distribution companies

## **Road Map for Market Entry**

### **A. Hypermarkets/supermarkets and warehouse outlets**

#### **Entry Strategy**

Hypermarkets source their supply from importers or import of their own. Locally manufactured products are sourced directly from producers, thus keeping prices competitive and maintaining consistent quality.

#### **Steps**

- 1/U.S. exporter
- 2/Importer/official representative
- 3/Hypermarket/Supermarket/Warehouse
- 4/Groceries/mixed shops

#### **Market Structure**

##### **Hypermarkets**

The first hypermarket in Bulgaria (METRO), opened its first outlet in the spring of 1999.

Over the next three years, the company opened 6 more outlets in big cities. The Greek company ENA opened 5 outlets for the same period. In 2000, the Austrian BILLA entered the market and developed faster than the other two companies, thus as of mid-2003 BILLA has 11 hypermarkets in all major towns.

Three more German companies have plans to enter the local market in 2003 and 2004: Kaufland, Hitt and Liddle. The most advanced is Kaufland investment program which plans to open its first outlet at the end of 2003 with a meat slicing/processing service and baking operations. According to Kaufland, its investment plans are for 120 million Euro in 25-30 outlets in Bulgaria over the next 5 years. The company BILLA announced its plans to expand with 3 more outlets till the end of 2003, and 5 to 7 outlets in 2004. The Turkish RAMSTORE plans to open its third outlet by the end of 2003 in Sofia.

Currently, only METRO requires a client card and a minimum limit of purchase of \$25 per a card. METRO is the major source of food and beverage products for smaller groceries, shops, café, etc. The usual services to consumers in hypermarkets and supermarkets are ATMs, payments with debit cards, currency exchange offices, video tapes rent, newspaper booths etc. METRO and FANTASTIKO offer café and children entertainment rooms; FANTASTIKO has drug stores and playgrounds. RAMSTORE offers a special client card which allows discounts for a selected list of foods.

In addition to various services, hypermarkets/supermarkets compete on the basis of brands, types of products, and packaging. For example, the local chain FAMILIA offers so-called "chocolate milk" which can not be found in any other supermarket chain. BILLA manufactures and offers specialty salads such as "katak". RAMSTORE produces and offers Turkish sweets and delights. Many supermarkets offer own baked specialty bread and try to expand their salad bars with freshly grilled/baked meats and cooked meals. These bars become increasingly popular, especially for a weekend shopping. METRO and RAMSTORE developed a private label for a number of food products, "Aro" (by METRO) and "Ramstore" (by RAMSTORE).

Hypermarkets/supermarkets constantly offer food promotions and discounts. An usual pattern also includes tasting stands for larger manufacturers (Nestle, Douwe Egberts, Unilever, President, local Boni Oborot, Tandem etc.). The tasting promotions are at least once per week. The most recent trend is to have promotions, special stands and price discounts for products of a certain origin, for example, Italian month in METRO.

The most recent trends in the hypermarkets/supermarkets are:

- Higher shelf space for fresh fruits and vegetables. In the early stages, hypermarkets/supermarket were not offering these products and the open farmer markets had a monopoly on these sales. Over the past three years, fresh fruits and vegetables are offered in an increasing volume and better variety. Hypermarkets/supermarket make efforts to offer such type of fresh fruits and vegetables which require special storage (chilling, freezing) and can not be sold on the open markets; in special packaging such as family size mixed salads; with



added value - sliced, seasoned and vacuumed vegetable salads; and at competitive prices. An advantage is the availability of precise electronic scales and consumer choice (consumers can select fruits/vegetables on their own while on the open markets they usually can not).

- Other product groups which enjoyed an increased shelf space are as follows:
  - alcohol and soft drinks beverages. Their shelf space doubled by 2003 compared to 1999;
  - dairy products, especially cheese - double shelf space in 2003 compared to 1999;
  - seafood, especially various fish and fish products - triple shelf space in 2003 compared to 1999;
  - fresh meat and meat products - double shelf space for the same period.
- Another trend is the increase in the variety of specialty breads and bakery products. Shelf space for these products have doubled for the period 1999-2003. The expansion covers the types of bread and the packaging, from small packages of 100-150 grams up to the usual standard bread of 500, 750 and 1,000 grams. Some hypermarkets/supermarkets have independent stands for one or two bread manufacturers whose products are at high demand.
- Salad bars were unfamiliar to local consumers before the entry of hypermarkets and supermarkets. Initially, they were not very popular due to relatively higher prices of processed products displayed and sold there. However, they quickly earned popularity and currently their shelf space is **70 percent higher compared** to 1999. Salad bars expended their list of products and added a number of foods produced "on the spot" and under the label of the respective chain.

## Table#2. Hypermarkets/Supermarkets Profile, 2001

<b>Hypermarkets/Supermarkets Profile, 2001</b>						
Name	Ownership	Total sales, USD million	Food sales, percent	Num. of Outlets	Location	Type of Purchasing Agent
Metro	Germany	237.8	50	7	Nationwide	Importers, Producers, Direct Import
Billa	Austria	38.9	90	11	Nationwide	Importers, producers, Direct Import
Ena	Greece	3.1	70	5	Nationwide	Importers, producers, Direct Import
Ramstore	Turkey	4.8	70	3	Sofia	Importers, producers
Source: Noema Ltd. research, 2003						

## Supermarkets

Hypermarkets are exclusively owned by foreign companies. Supermarkets are dominated by Bulgarian companies with the exception of BONJOUR. As of 2002, there are several supermarket chains but only BONJOUR has nationwide coverage. These regional supermarket chains are located in major population centers. Often, one company is growing only within the limits of a city. In Sofia, these supermarket companies did not grow in the number of outlets (due to hypermarkets competition). The exception is the company "Europa" which entered the market in 1999 and opened 9 retail outlets in Sofia for less than two years.

Usually, food sales account for 85-90 percent of total sales in supermarkets. They are more competitive compared to hypermarkets in terms of convenient locations/proximity to consumers, better and more consumer services, and longer working hours. Therefore, supermarkets are preferred daily shopping choice compared to hypermarkets which rely more on weekend/holiday shopping. In addition, the number of consumers who do not use cars in Bulgaria is high and therefore, they prefer walking distance shopping options.

Most supermarkets work with importers and do not make own imports. An exception is BONJOUR which has own imports of confectionary (chocolate, candy, waffles, biscuits), spices, mustard and alcohol (whisky, gin, vodka). Most supermarkets prefer to have own

direct imports of non-food products.

**Table#3. Supermarkets Chains Profile, 2001**

Supermarkets Chains Profile, 2001						
Trade Mark and Company Name	Ownership	Total sales, USD million	Food sales, percent	Number of Outlets	Location	Type of Purchasing Agent
BONJOUR/ Stambouli	Cyprus	26.6	15-20	29	Nationwide	Direct Import, Wholesaler
FANTASTIKO/ V.Nikolov	Bulgaria	22.3	90	21	Sofia	Direct Import, Producers
Piccadilly/ Bolyari	Bulgaria	12.3	85	3	Varna	Importers, Producers
Oasis	Bulgaria	5.0	85	4	Sofia	Importers, Producers
Tzentrokom	Bulgaria	1.2	70	4	Veliko Turnovo	Importers, Producers
Europa	Bulgaria	1.4	75	9	Sofia	Importers, Producers
Misota	Bulgaria	NA	85	3	Plovdiv	Importers, Producers
Kome	Bulgaria	NA	NA	4	Sofia	Importers, Producers
345	Bulgaria	NA	NA	4	Sofia	Importers, Producers
Source: Noema Ltd. research, 2003						

### Warehouses/wholesale markets

Wholesale markets/warehouse are still a major source of supply for smaller retail shops, and sometimes, for groceries and smaller food service outlets. Wholesale warehouses vary in size and location. As of 2002, 91 percent of total food and beverage warehouses (3,000) in the country are small sized, scattered all over the country, and handle both wholesale and retail sales. The remaining 10 percent are warehouses which have only wholesale sales.

Some warehouses, 8 percent, are specialized in product categories, for example, for seafood and fish, for meat, for fruits and vegetables etc. Others, 92 percent, sell a variety of products. The role of warehouses is currently declining with the expansion of hypermarkets. One important service which is offered by hypermarkets and is missing at warehouses, is the precise accounting documents/invoices/certificates etc. which accompany each sale and which can not be always presented at the warehouses due to existent "gray" players.

## **B. Convenience stores, specialty shops, mixed shops, gas marts, kiosks**

### **Entry Strategy**

The best approach for a foreign company to enter the local market is to engage a local representative who has direct contacts with potential clients and can be responsible for overall business management. The representative or country manager should be well aware of local business practices, legislative and regulatory environment and be conversant with changing regulations and laws. Due to "gray" sector or illegal trade, it is recommended that foreign companies conduct due diligence and undertake careful and detailed research on their future local representative. Bulgaria does not have well developed education in the area on retail/food marketing and retail management. Therefore, hiring local staff usually requires professional training.

The usual marketing chain for U.S. products is:

- 1/ U.S. exporter
- 2/ Bulgarian importer, distributor
- 3/ Bulgarian distributor/wholesaler/hypermarket
- 4/ Local retailer (convenience stores, kiosks, groceries)

### **Market Structure**

- Groceries: Groceries or so-called minimarkets account for 54.1 percent of total retail food **sector sales**. They try to combine long working hours with a variety of food products and some non-food items. In cities, their competitive advantage is the location. Since groceries have limited purchasing power, they usually source their products from wholesalers, distributors and food producers. The number of grocery outlets as of 2002 **was 52 percent of total food retail outlets**.
- Mixed shops: In villages, the most popular are so called "mixed" shops which offer food and non-food items of first necessity: sugar, salt, vegetable oil, clothing, shoes. This is related to the low purchasing power of rural population, usually pensioners of age over 60 years, and a monthly income of \$40. This type of outlets have the lowest market share in total retail food sales, about 1.3 percent.
- Specialized shops: the most typical are those for fresh meat and meat products; seafood; bakery and confectionary products; fruits and vegetables; and beverages (alcohol and soft drinks). Their market share is 4.2 percent. Most of these outlets

rely on their own processing/handling. The most recent trends over the last two years, are the tea/coffee shops; spices and condiments shops; and confectionary/sweets shops.

- Street kiosks: they account for **13.4 percent of retail food sales**. They are scattered all over the country but are concentrated in cities and usually work 12-24 hours. The typical product list includes packaged foods which do not require special refrigeration such as snacks, popcorn, biscuits, chocolates, sweets, bubble gums, beverages (alcohol and soft drinks) and cigarettes. Some kiosks specialize in a single product sales - the most typical are nuts/dried fruits, and soft drinks. The usual source of supply for kiosks are hypermarkets and wholesale warehouses.
- Factory outlets: Factory outlets are usually attached to the manufacturers' production facilities. These outlets are small in numbers, 2-5 per a company. Their typical clients are travelers, factory workers, tourists etc. Their market share is below 1.0 percent.
- Gas stations: The first gas stations retail outlets were opened in 1998 in the largest gas station chain "Shell". Currently, all such chains have retail outlets, often with a food service outlet. Newly emerging independent gas stations also open retail outlets. The typical foods are snacks, drinks, grilled chicken etc. They work with importers and manufacturers, as some foods are imported directly by the gas stations chains. In 2001, the market share of these outlets was estimated at 3.0 percent.

**Table #4. Major Gas Marts Chains Profiles, 2001**

<b>Major Gas Marts Chains Profiles, 2001</b>						
Trade Mark and Company Name	Ownership	Total sales, USD million	Food sales, percent	Number of Outlets	Location	Type of Purchasing Agent
LukOil/ LukOil Europe	Russian	1196.9	5.0	40	40	Importers, Wholesalers
Petrol	Bulgarian	251.5	2	602	100	Producers, Wholesaler
Select/ Shell Bulgaria	United Kingdom	143.2	10	75	73	Importers, Producers
Viva/OMV Bulgaria	Austria	64.1	15	35	30	Wholesaler, Producers
Eko and Bravo/Eko Petroleum	Bulgarian	17	10	20	10	Importers Wholesaler Producers
Source: Noema Ltd. research, 2003						

## C. Traditional Markets

### Entry Strategy

Traditional/open markets are the typical shopping places for fresh fruits and vegetables although some other foods are also offered there. The sellers vary from farmers/producers to small independent traders and distributors. Those who are not farmers, have their daily supply either from the local wholesale markets or from farmers in the surrounding area.

Entry strategy steps:

- 1/U.S. exporter
- 2/Importer
- 3/warehouse/wholesaler
- 4/traditional market

## Market Structure

Currently, the market share of open markets is estimated at 2.5-3.0 percent. Their competitors are specialized fruits and vegetable shops and hypermarkets/supermarkets. Except for the typical fruits and vegetable open markets, there are open markets specialized in seafood; meat; dairy products and flowers.

Almost all medium size towns have so called weekend-markets. These are extended regular open markets which usually add more stands during the weekend and thus expand the consumer choice. Almost each village and town have so called local "fairs" similar to "county fairs" in the United States. These fairs are once or twice annually in each residential location, in the spring and in the fall, and last 3-4 days.

Open markets, along with the weekend-markets and fairs have recently become more attractive as a communication and socializing place especially for pensioners or other not active population (open markets usually have café, day bars, cafeterias and fast food service outlets). Since these markets can hardly compete in quality and prices, efforts are directed toward services, specialty products, and convenience.

## Competition and best products prospects

The major United States competitors vary depending on the products. In general, these are Brazil, France, Greece, Germany, United Kingdom, Hungary and Poland.

Germany: the most competitive are dairy products, sweets, biscuits, chocolate, snacks, muslie and beer;

France: the most competitive are dairy products, poultry, seafood and fish, wine, mineral water and soft drinks;

Greece: fresh and dried fruits and vegetables, confectionary, juices, alcohol;

Brazil: sugar and meat products;

Poland: bakery products, biscuits and pasta products;

United Kingdom: alcohol, seafood and fish;

Hungary: pet foods, mineral water, soft drinks, beer.

The most dynamic is the growth in imports and consumption of the following products (in descending order):

-fresh fruits and vegetables;

-alcohol

-vegetable oils

-meat

-spices and condiments

-convenience foods

-nuts

-confectionary

The best prospects for U.S. products in the retail sector currently are as follows:

- turkey and chicken;
- red meat - mainly pork;
- seafood, more inexpensive items such as mackerel;
- nuts;
- beverages, both soft drinks and alcohol;
- sauces and ketchup;
- some fresh fruits and vegetables (apples).