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CONTEMPORARY WINE PRODUCTION - TRADITION AND INNOVATION



BSMEPA
BULGARIAN SMALL AND
MEDIUM ENTERPRISES
PROMOTION AGENCY



BRAIN++
AI FACTORY

ARCFUND

Connecting ideas, Creating impact

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Innovation VS. Tradition / Innovation + Tradition



Introduction

Wine production is a fine balance between:

Tradition + Innovation +

Terroir + Market forces

- The global wine sector is undergoing significant transformation
- Bulgaria is facing structural change rather than a temporary crisis
- Need for adaptation to new consumption patterns and regulations

Traditional Foundations

- Long-lasting historical and cultural heritage of Bulgaria since ancient times
- Historical dominance of red wines
- Strong dependence on terroir, regional practices and cultural identity
- Reliance on international grape varieties



Bulgarian Wine Sector

Vineyard area: **~26 000 ha (2024) / ~ 20 900 ha (estimated for 2025)**

Grape production: **~124 161 tons (2024)**

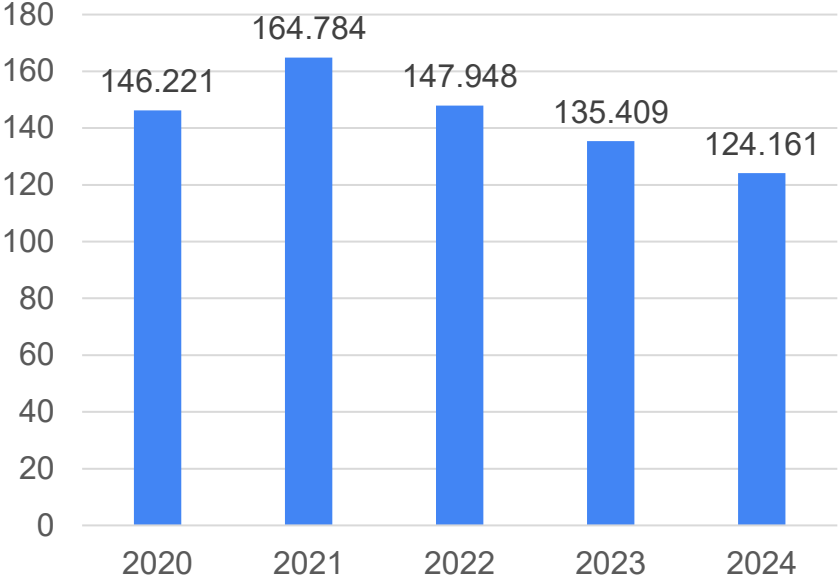
Wine production: **~634 000 hl (2024)**

Aging vineyards: **~50% of the vineyards are over 30-year**, which influences the overall productivity (<2% of the vineyards are up to 3 years old)

Strongly fragmented production: **~4 000 farms** around the country with low share of new ones

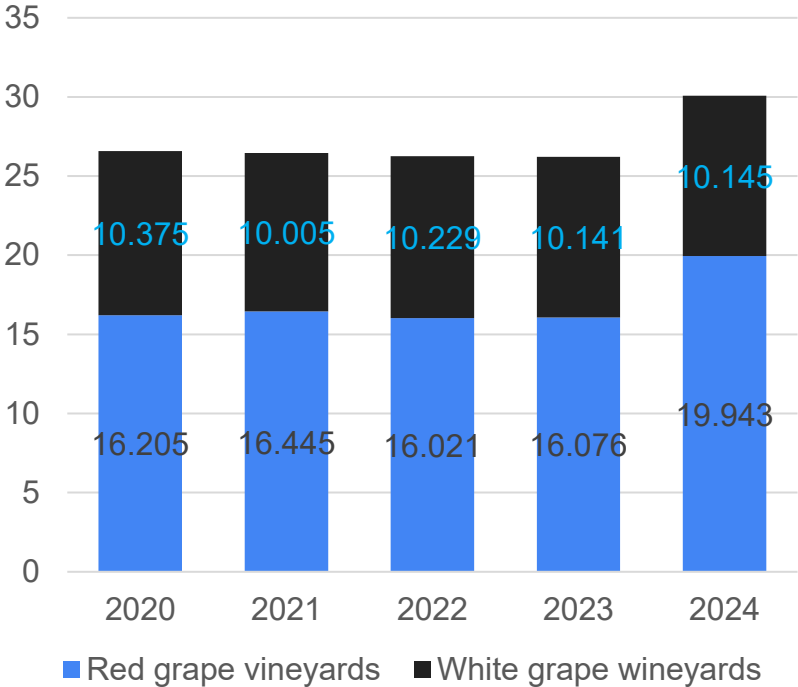
Predominance of international wines: only **20% of the vineyard area** is covered by local sorts

Prevailing production of **red wines** (in contrast with the global consumer tendencies)



Annual Grape Production in Bulgaria (hl)

2020-2024

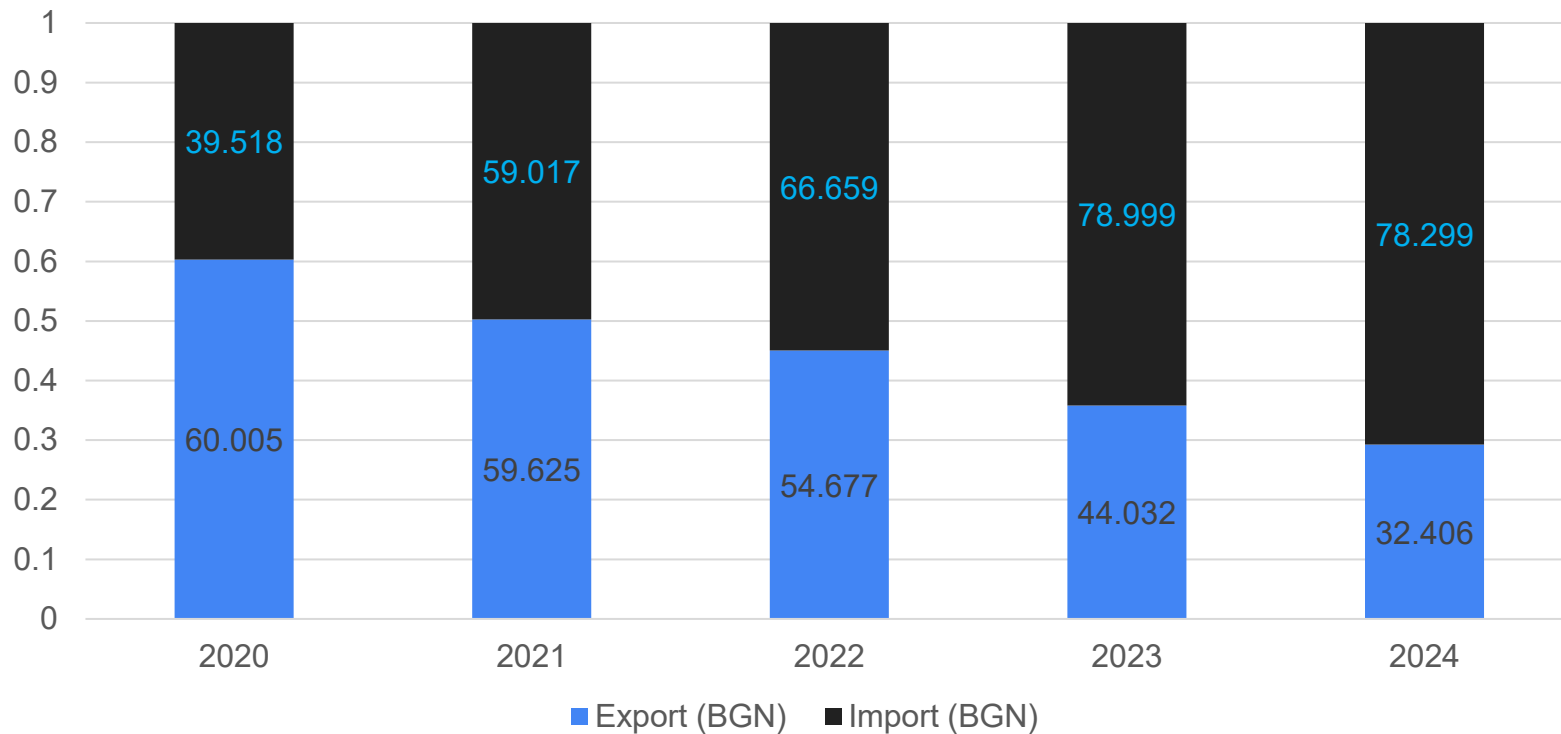


Distribution of vineyards in Bulgaria (ha)

2020-2024

International trade and competitiveness of Bulgarian wine market (BGN)

2020-2024



Structure of vineyard age in Bulgaria

	</= 3 years	3-9 years	10-29 years	</= 30 years
2020 (ha, total)	2 823, 10 (4,7%)	4 193, 60 (6,9%)	19 606, 40 (32,6%)	33 525, 30 (55,7%)
2024 (ha, total)	987, 73 (1,8%)	6 728, 20 12,1%	18 616, 26 (33,5%)	29 237, 62 (52,6%)

Data: Bulgarian Executive Agency on Vine and Wine

Global Wine Sector

Vineyard area: ~7,1 million ha (2024)

Grape production: 124 161 tons (2024)

Wine production: 634 651 hl (2024)

Highly competitive and mature market,
there is constant EU dominance
(~60% of global production)

Structural adjustment at global level:
Declining global consumption with
shifting consumer behaviour following
newest trends for healthy lifestyle

Climate change impact leading to yield
risks

Top 10 Global Suppliers

1. **Italy (47.4M hl)**
2. **France (35.9M hl)**
3. **Spain (29.4M hl)**
4. United states (21.7M hl)
5. Australia (11.6M hl)
6. Argentina (10.7M hl)
7. South Africa (10.2M hl)
8. Chile (8. 4M hl)
9. Germany (7. 3M hl)
10. Portugal (6. 2M hl)

Current Trends: Consumer Preferences

- Shift toward lighter wines and lower alcohol content
- Increasing popularity of the “mindful drinking” concept
- Preference for quality over quantity, authenticity over price
- Stable growing demand for fresh and light white wines, declining preference for heavy, high-alcohol wines

Current Trends: Technological Innovations

- Development and integration of dealcoholization techniques as a answer to the growing demand for zero-alcohol beverages
- Precision in each step of viticulture, including: climate monitoring, vine health managing and scheduling the optimal harvest time
- Implementation of new digital practices for controlled fermentation processes leading to higher quality and richer wines

Current Trends: Indigenous Varieties & Authenticity

- Increasing demand for local grape varieties and terroir-driven wines
- Wine is cultural expression and regional identity marker
- New opportunities for boutique and small producers
- Opportunity for Bulgaria to strengthen its identity

Current Trends: EU Policy Impact

- More funds and flexibility for wine producers
- Clear labels for alcohol-free and reduced alcohol wines
- Wine tourism and exports promotion
- Promotion of sustainable production and responsible consumption
- Key measures towards crisis distillation, green harvesting and vineyard restructuring

Innovation VS. Tradition or **Innovation + Tradition**

Integration of modern technologies while preserving
traditional practices and identity

Adaptation to global trends, avoiding **over-industrialization**

Future depends on **innovation, differentiation and sustainability**

Appreciate Your Attention!

