Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network

Voluntary Report - public distribution

Date: 5/22/2002

GAIN Report #BU2007

Bulgaria

Oilseeds and Products

Market in Bulgaria MY 1999 - 2002

2002

Approved by:
Holly Higgins
U.S. Embassy
Prepared by:
FAS Regional Staff

Report Highlights:
For the first time in 10 years, MY01/02 sunflower seed production was not enough to meet domestic demand. Uneven local crops have opened the door to imports of high quality (moderate priced) oilseeds, meals and oils. Imports of U.S. soy oil could increase due to development of local food processing industry. There is a potential for soybeans if crushing operations are improved. Bulgaria remains – in the near term– a chronic protein meal deficit market.

Includes PSD changes: Yes
Includes Trade Matrix: No
Unscheduled Report
Sofia [BU1], BU

Executive Summary

This report contains final information about MY99/00 and MY00/01; preliminary data about MY01/02 and forecast data for M02/03. Information about MY99/00 is given in a separate table in the report and not in the attached GAIN spreadsheets since they contain

information for the last three marketing years only. Sources of data for this report are industry and local government contacts, as well as the oilseed bulletin of Bulgarian Ministry of Agriculture.

Imports of soybeans, which have never been significant in Bulgaria due to lack of crushing facilities, increased in 2001 with imports of 12,000 MT of U.S. soybeans in December 2001. These imports were driven by lack of local raw materials for processing into vegetable oil (poor local sunflower crop) but also by the high demand for soybean meal. Reportedly, the quality of resulting soybean meal was not satisfactory due to lack of technology and knowledge. It is estimated that Bulgaria will not likely to import beans in 2002 due to an anticipated good sunflower crop unless an improvement of the local crushing facility is done in order to produce high grade protein meals; and if the market for soybean oil continues to offer attractive opportunities.

Imports of soybean meal in MY01/02 were at a record high for the last three years and reached 62,000 MT due to stable development of the local poultry industry. Development of pork industry has been uneven, thus demand for soybean meal by pork producers fluctuates. The forecast for MY02/03 is for similar imports of soybean meal with a slight reduction due to higher pork slaughter rates projected in 2002. In MY00/01, the U.S. exported about 10,000 MT of hi-pro soybean meal to Bulgaria a government donation which was commercially sold on the market at a high price. In 2002, the American Red Cross is also importing 3,000 MT of U.S. hi-pro soybean meal for local commercial sales. Given these donations, U.S. market share in MY00/01 and MY01/02 increased to 6,000-7,000 MT (10-14 percent of total soybean meal market) with an expectation for similar amounts in MY02/03.

An interesting market trend over the last two years is increased imports of vegetable oils other than sunflower oil. This trend is related to the lack of sufficient local production of sunflower oil and to the development of the food processing industry and food service sector. Imports of soybean oil accounted for the largest share in these oil imports. According to the American Soybean Association, estimated imports of soybean oil of U.S. origin, not directly exported from the U.S. to Bulgaria but via processing of U.S. beans into oil in third countries (Greece, Turkey, Israel) totaled about $1.0 million in CY2001.

Soybean oil, in general, is expected to increase its market share to at least 5-10 percent as part of overall human consumption in the next two years.

Sunflower production was hard hit by drought over the last two years. Crop areas and production declined to record low levels in MY01/02. Some stabilization is forecast in MY02/03 due to maintenance of crop areas. Higher yields are forecast in MY02/03 due to favorable climate conditions. Exports of sunflower seeds increased despite a local shortage in MY01/02 thanks to attractive international and regional prices. These exports should be ongoing in MY02/03 due to expectations for a stable world/regional market situation and prices. Exports of sunflower oil declined due to Bulgaria's low international competitiveness (unsatisfactory quality).

Due to high world prices, imports of sunflower seeds in MY01/02 are not expected to be significant despite a local shortage due to high world prices. Limited imports of planting seeds have prospects to grow, thus substituting local planting seeds i.e. not due to increased planted areas. Imports of sunflower oil should increase in MY01/02 due to local shortages, but very likely will be substituted by other vegetable oils due to high world prices.

TOTAL OILSEEDS

PRODUCTION

General

Soybeans

The data in the PS&D table for soybeans for MY99/00 to MY01/02 is based on final official data. As seen from production tables below, local production was practically nil over the last two years due to very dry conditions. Significantly higher soil moisture and precipitation in the spring of 2002 encouraged a slight increase in planted areas which are forecast to reach 3,000 HA. However, this is still very limited production compared to local needs of soybean products. In the medium-long term, this situation is not likely to change significantly due to lack of irrigation systems and naturally unfavorable weather conditions. For this reason, this report focuses mainly on imports/consumption of soybean products and not on local production.

Sunflower

Sunflower data in the PS&D table includes both oil bearing and striped (birdseed) sunflower-seed. Separate data for crop area and production of the two major, local types of sunflower can be found in the table below.

Table #1. Production Table for MY1999/2000, MY2000/2001, and MY2001/2002

Crops	Planted Crop Area, HA			Production, MT		
	1999	2000	2001	1999	2000	2001
Soybeans	5,108	1,625	1,280	5,576	1,500	850
Sunflower						
Oil type	640,000	565,000	355,000	698,000	539,000	355,000
Black & white	40,000	25,000	43,000	45,000	19,000	37,000
Total Sunflower	680,000	590,000	398,000	742,000	558,000	392,000
Note: Harvested area for oil bearing type sunflower (industrial) in MY01/02 was 348,000 HA; 41,000 HA for striped(birdseed) sunflower and total 389,000 HA for total sunflower. Harvested area for MY00/01 was estimated at 560,000 HA.						

In **MY1999/00**, early crop area estimates varied widely from 528,000 HA to 680,000 HA. Final data confirmed the higher estimate, which is used in this report. Unusually expanded planted area was a result of high farmgate prices (330-350,000 Bleva/MT) in the previous MY1998/99 when the GOB removed an export tax of $50/MT. This stimulated higher demand for exports. Therefore, sunflower production in that year had a higher profitability compared to grain crops. In addition, purchases from farmers (both for exports and for local crush) were made early. Production estimates for MY99/00 varied from 580,000 MT to 750,000 MT. The final production result was for the higher figure, 742,000 MT, and used in this report.

In **MY2000/2001**, crop area under sunflower declined 14 percent to 590,000 HA. This was due to the severe regional drought, especially in the major production areas of Dobrudga where lower yields led to a 20 percent decline in production to 558,000 MT (after deduction of 4 percent for foreign matter and 3 percent for losses out of total gross/harvested production of 598,000 MT). About 30,000 HA of sunflower were totally lost due to drought. Production of striped (birdseed) sunflower in MY00/01 was estimated at 19,000 MT from 25,000 HA.

In **MY01/02**, total planted area for sunflower seed was estimated at 398,000 HA. Due to drought losses, about 9,000 HA (2.2 percent) were not harvested. Therefore, final harvested area was 389,000 HA. The main reasons for the decline in sunflower area over the last three years are continued drought, lack of irrigation due to poor infrastructure, and the high price of irrigation water. Generally, farmers switched to more drought resistant crops such as wheat. A recent MinAg survey among sunflower producers showed that most of them are still growing wheat. Another factor for the decline in area in MY01/02 were relatively low farm gate prices. As a result, sunflower area in 2001 accounted for 12 percent of total cultivated ag land versus 17.4 percent in 2000.

Total production was estimated at gross/harvested weight of 405,000 MT, which after a deduction of 3.2 percent foreign matter, is converted into 392,000 MT total production. Out of the total, 355,000 MT is oil bearing (industrial) sunflower, and 37,000 MT is striped (birdseed) sunflower. For the first time in the last 10 years, MY2001/02 production was not sufficient to meet local demand.

According to preliminary MinAg information (November 2001), sunflower farmers planned to further reduce area in MY02/03. According to the survey, the decline may reach 20 percent which implies a total planted area of 320,000 HA. With average yields at the traditional level (no drought is forecast in 2002), total MY02/03 production would be 320,000 MT-350,000 MT. However, recent higher prices on the local and international market are making some farmers re-consider production plans. In addition, very favorable winter and spring weather in 2002 allowed many farmers to continue to plant sunflower. For example, there was no registered reduction in sunflower planting seeds sales in 2002. Therefore, the FAS Office is forecasting a stable level of planted area as in MY01/02, at 400,000 HA. If weather continues to be favorable, yields are expected to be in the range of 1.1-1.2 MT/HA, with forecast total production of
450,000 MT.

Production Problems

Crop rotation: According to MinAg data, in MY01/02, about 80 percent of all sunflower is grown following wheat crop and about 10 percent is second year sunflower. Crop rotation in the previous two years was similar.

Planting seeds: The use of certified planting seeds is usually about 3,000 MT depending on the planted area. In MY99/00, the share of imported seeds in total planting seeds, 3,000 MT, was 17 percent (only 500 MT) according to the MinAg data. In MY00/01, the share of imported planting seeds increased to 50 percent (1,100 MT). Total planting seeds use in MY00/01 was about 2,000 MT due to lower planted area. In MY01/02, imports of planting seeds were lower, 651 MT, (December ‘00 - April ‘01) versus 1,100 MT for the same period in MY00/01. Out of this total, 220 MT were imported from Turkey, and 100 MT each from Hungary, Italy, and the United States. According to the MinAg data, in MY00/01 and MY01/02, about 80 percent of all sunflower growers used certified planting seeds. The most popular hybrids are local: Albena, Peredovik (Russian origin) and San Luka; along with imported hybrids from the United States and France.

The forecast for MY02/03 is for the same level of planting seed use with a growing share of imported seeds used.

Average Yields: Traditionally, the regions with the highest average yields (1.5 MT/HA) are in the north-east: Varna, Rousse, Dobrich; and some areas in north-central Bulgaria. Potential yields from local hybrids is 2.0-2.7MT/HA (local and imported planting seed). Good private growers register yields from 1.6 MT/HA to 2.2 MT/HA. In MY01/02, the highest yields were recorded in north-central and north-west Bulgaria with an average 1.33 MT/HA and 1.10 MT/HA, where drought was not significant. The hardest hit was the Dobrich region in the north-east which is traditionally the largest production zone.

The main reason for low average yields in the country (except for drought) over the last two years are: poor soil preparation and cultivation, improper hybrids for specific regions; late or early planting; low use of fertilizers and herbicide treated area. This has consistently resulted in low yields and relatively poor crop quality. The percent of empty shells and foreign matter is increasing while the average fat/oil content is declining.

According to annual MinAg data for sunflower area, the percent of area treated with fertilizers and herbicides is fluctuating as follows:

MY99/00 - 48 percent treated with nitrogenous fertilizers; 6 percent with phosphorus fertilizers; and 3 percent with combined fertilization; 45 percent treated with herbicides, 9 percent with insecticides and 6 percent with fungicides.
MY00/01 - 37 percent treated with nitrogenous fertilizers; 2 percent with phosphorus fertilizers; and 3 percent with combined fertilization; 47 percent treated with herbicides, 6 percent with insecticides and 6 percent with fungicides
MY01/02 - 48 percent treated with nitrogenous fertilizers; 3 percent with phosphorus fertilizers; and 3 percent with combined fertilization; 55 percent treated with herbicides, 7 percent with insecticides and 8 percent with fungicides

Production Policy

In 2000, the government "Fund Agriculture" created 5 specialized programs to support sunflower production: in-kind credit in the form of fertilizers (about 800 contracts at cost of 10 million Bleva); target credit line for fertilizers (about 700 contracts at a cost of 6 million Bleva); target credit line for purchase of plant protection chemicals (about 500 contracts at a cost of 6 million leva); target credit line for production of oil bearing sunflower seeds (300 contracts for 2 million Bleva; preferential credit line for financial support of sunflower growers (covers not more than 50 percent of the direct production expenses). The Fund Agriculture is subsidizing the interest rate on these programs.
In January 2001, Fund Agriculture approved two credit lines for sunflower growers aimed to support use of fertilizers. Total support was 10 million Bleva of which 2.5 million was a direct subsidy.

In 2002, Fund Agriculture had three credit lines supporting both use of fertilizers and plant protection chemicals, as well as use of certified planting seeds.

There are no government programs to support soybean production in Bulgaria.

Prices

Soybeans

Average farm-gate prices in MY00/01 were about 500 Bleva/MT ($250/MT). In MY01/02, the price dropped to 500 leva/MT ($227)/MT. Since local production is very limited, these prices are only for purchases by small soya extruders for production of full fat soya meal; mainly for on-farm consumption. Imports of soybeans are not traditional. Thus, there is no competition between local production and imports.

Sunflower

In **MY99/00**, average **farmgate prices** for the period October-December 1999, were lower than those for MY1998/99 or between 231Blvea/MT ($125/MT) and 303 Bleva/MT ($165/MT), compared to 332 Bleva/MT and 354 Bleva/MT for the same period of the previous year. This sharp increase in farm gate prices was a result of high export demand and competition among local crushers. Prices remained stable (at about 300 leva/MT) in the beginning of CY2000. However, sunflower was virtually absent from the market during that period due to lack of exports and increased local purchases.

Average **export prices** in MY99/00 were in the range of $182-192/MT FOB and $175-206/MT DAF (for the most intensive export period of September - December 1999). They were lower than in the previous year due to an overall reduction in the world prices for oilseeds. The DAF prices (for Turkish exports, ex Bulgarian -Turkish border) in the first months of CY2000 for small export shipments delivered by rail/truck varied from $195/MT in January ‘00 to $206/MT in March ‘00.

In **MY00/01**, average **farm gate prices** for the period September - December 2000 were higher than in MY99/00, if calculated in local currency (between 304 Bleva/MT in September and 287 Bleva/MT in December). Due to a higher exchange rate of the U.S. dollar in this period, these prices were actually lower if calculated in dollars (between $136/MT in September and $131/MT in December 2000 compared to $125/MT and $165/MT, respectively in 1999). This trend developed due to stable world prices of oilseeds during that period. At the same, local crushers did not offer higher prices for crushing into oil for exports, due to the depressed international sun oil prices. Exporters did not offer higher prices due to the poor quality of the 2000 drought hit crop.

Export prices in MY00/01 were also lower than in MY99/00. Due to small exports of only 10,000 MT to Turkey in MY00/01, the only export prices recorded were DAF $151-169/MT Bulgarian border. The average FOB export price for MY00/01 was $163/MT.

In **MY01/02**, **farm gate prices** reached a record high due to very limited local supply and keen competition among local crushers and exporters. Post harvest prices started at 361 Bleva/MT ($164/MT) which is the highest for the last three marketing years. By November 2001, farm gate prices reached 381-397 Bleva/MT ($173-$180/MT) which is 25-28 percent higher than in the same period in MY00/01. At that time, the new sunflower crop was already entirely purchased. Trade in 2002 continued with small lots of non-commercial size at 500-600 Bleva/MT ($227-$272/MT).

Average monthly **export prices** in MY01/02 were $189-220/MT FOB and $201-217/MT DAF which is about $30-35/MT higher than in MY00/01. The FOB prices were quoted for exports totaling 35,000 MT for sea shipments; and about 22,000 MT were quoted at DAF prices for shipments to Turkey (September /December 2001). To date, the average MY01/02 FOB price was $208/MT and DAF price was $204/MT.

CONSUMPTION

Soybeans

All soybeans produced in the country are used for crushing by small- medium sized extruders. The usual beans-to-meal conversion rate is about 82-83 percent. This locally produced meal is used for on-farm feeding of poultry. This type of production is not commercially important. In 2001, 12,000 MT of U.S. beans were crushed by a local crushing factory into about 10,000 MT-11,000 MT of soybean meal. This was the first attempt in Bulgaria to process sizable amounts of soybeans into meal. However, the soybean were processed in a plant equipped for processing sunflower. Lack of the necessary technology as well as lack of professional experience and training resulted in mediocre quality. The resulting price fell down to $200/MT. As of May, 2002, it was about $220-230/MT, which is comparable to the price of imported soybean meal ($230/MT-240/MT). Local producers are trying to maintain the price of domestically crushed meal $30/MT lower than the price of imported meal.

Sunflower

Crush use

Crush consumption for vegetable oil in **MY99/00** was about 443,000 MT. Local crushers could neither purchase large lots nor export, due to short cash problems. In addition, most crushers had high production expenses, and as a result, high production costs, which made local sunflower oil uncompetitive on foreign markets. There were crushing factories which did not purchase any sunflower-seed and stopped working.

In **MY00/01**, consumption for crushing increased 5 percent to 465,000 MT which was estimated to produce about 153,000 MT of sunflower oil. In **MY01/02**, low production and higher exports led to limited quantities of crush consumption, about 275,000 MT, which is 40 percent lower then in the previous year. This amount is not sufficient to meet local needs for vegetable oil.

The forecast for **MY02/03** is for a larger sunflower crop and respectively higher local crush consumption estimated at 320,000 MT. This means sun oil production should be 106,000 MT, which although higher than in MY01/02, will not be sufficient to meet local needs.

Other use

In **MY99/00**, consumption for "other than for crush use of sunflower", was estimated at 22,000 MT-23,000 MT. Out of this total, about 10,000 MT were used as nuts for snack consumption; 12,000 MT for production of khalva (local sweet); and about 1,000 MT for feed. In **MY00/01**, "other use" consumption increased to 32,000 MT. Estimates for **MY01/02** are for a slight decrease to 29,000 MT (18,000 MT for nuts, and 11,000 MT for khalva). Estimates for **MY02/03** point to a slight recovery to 30,000 MT for "other use".

TRADE

In the PS&D tables and trade matrixes for sunflower seeds, the export and import data is based on official, final data in metric tons. In the PS&D table for soybeans, data for imports and exports are on calendar year basis as marketing year information was not available. However, due to almost zero local production, calendar year data is accepted for the marketing year for the purposes of this report.

Imports

Soybeans

Imports of soybeans were significant only in MY01/02 due to record low domestic production of sunflower. It is notable that the first sizable soybean imports were of U.S. origin due to the high quality image of U.S. soybean products on the local market. To a large extent, these imports were driven by the successful sales of the U.S. government imports of soybean meal earlier in CY2001.

Sunflower

In MY99/00, imports of sunflower-seed were negligible (1,700 MT) since local sunflower prices were lower than international and Balkan regional prices. In addition, the import duty for oil- bearing (industrial) sunflower-seed was 15 percent. Imports in this period consisted mainly of planting seeds (January - March 2000 - 1,115 MT) at a duty of 10 percent, mainly from France, the United States and Turkey. In MY00/01, imports were slightly higher at 2,600 MT. Expectations for MY01/02 are for 7,000 MT (both industrial for crush use, and planting seeds) due to local shortages. Imports for the period September - December 2001 were 6,000 MT, mainly from Romania and Moldova (see attached trade matrix). Due to high international prices, it is doubtful that local crushers will take advantage of special duty free import quotas for sunflower seeds in 2002 except for small lots from regional suppliers. It is more likely that buyers will import vegetable oils and other less expensive oilseeds for crushing in Bulgaria, such as soybeans.

Exports

Soybeans

Bulgaria is a net importer of soybeans and products an does not export these products.

Sunflower

In **MY99/00,** total sunflower-seed exports were 277,000 MT. About 225,000 MT were exported between September - December 1999. Total MY99/00 oil bearing (industrial) sunflower seeds exports were 233,000 MT with 207,000 MT exported via Black Sea shipments. More than half of these exports were for three major export markets - Spain, the Netherlands, and Turkey. Bulgaria exports its entire production of black and white/striped sunflower-seed for birdseed use. In MY99/00, Bulgaria exported 44,000 MT striped sunflower-seed with major destinations being EU states.

In **MY00/01**, lower production, and higher local prices led to a significant drop in exports to about 60,000 MT (41,000 MT oil bearing and 19,000 MT striped), or 80 percent lower compared to the previous year. Exports in September-December 2000 were only 10,000 MT to Turkey via rail (versus 192,000 MT for the same period in MY99/00).

In **MY01/02**, in the period September - December 2001, Bulgaria exported 58,700 MT of oil bearing (industrial) sunflower-seed, mainly to Turkey (23,700 MT), Spain (23,000 MT), and Portugal (5,300 MT). Exports of striped (birdseed) sunflower for this period were 33,000 MT; or total exports of 92,000 MT for this period (see the attached trade matrix spreadsheet). Total MY01/02 exports are estimated to reach about 97,000 MT of which 60,000 MT oil bearing (industrial) and 37,000 MT striped (birdseed) sunflower. In MY01/02, high international prices and high demand on the part of Turkey and the EU stimulated Bulgarian exports. However, exports faced difficulties such as poor quality and strong competition between local crushers and exporters. This resulted in a quick increase of local purchase prices offered by crushers.

POLICY

General

In 1998, the privatization of the oilseed crushing industry was completed. Currently, all 20 facilities are private.

Trade

Imports

Due to the record low sunflower crop in MY01/02, Bulgaria introduced a rare measure for duty free imports of oil bearing sunflower in the period January 1- March 31, 2002.

In 2002, Bulgaria has preferential duties for selected countries which are equal to 70 percent of the general duty. These preferences are granted unilaterally to countries such as Egypt, India, Argentina, etc. Imports from Macedonia, EFTA, CEFTA are levied as general import duties. In 2002, sunflower imports from the EU are duty free. However, since EU is not a sunflower exporter, it is not likely Bulgaria will import EU sunflower seeds.

Import duties:

	CY1999	**CY2000**	**CY2001**	**CY2002**
HS#1201 Soybeans				
- planting seeds	0%	0%	0%	0%
- commercial	0%	0%	0%	0%
HS#1206 00 10 - Sunflower planting seeds	10 % general duty; 7 % preferential duty;	7 % general duty; 4.9 % preferential duty;	0%	0%

HS#1206 00 910 Striped sunflower	15% general duty 11% preferential duty	12 % general duty; 8.8 % preferential duty	5 % general duty; 3 % preferential duty	5%
HS#1206 00 99 Black oil bearing	15% general duty 11% preferential duty	April 1 - September 30 - 0 % October 1- March 31 - 12 % general duty, 7% preferential duty	April 1 - September 30 - 0 % October 1- March 31 - 10 % general duty, 7% preferential duty	April 1 - September 30 - 0 % October 1- March 31 - 10 % (0% for 2002)

Following are the CY2002 tariffs/quotas for oilseeds according to the EU, CEFTA, and bilateral trade agreements:

HS# Product	EU	CEFTA	Croatia
HS#1201 00 100 and 1201 00 900 Soybeans	0%	0%	0%
HS#1206 00 100; 1206 00 910; 1206 00 992 and 1206 00998 Sunflower seeds	0%	HS#1206 00 10 Sunflower planting seeds - 0 %	HS#1206 00 10 Sunflower planting seeds - 0 %

Exports

Since October 1998, exports of sunflower-seed have been fully liberalized. Since CY2000, Bulgarian exports to EU, EFTA, CEFTA and Macedonia are executed at the respective general import duties for third countries. Exceptions include the Czech Republic and Slovenia where Bulgarian sunflower is regulated within quotas of 3,000 MT and 100 MT, respectively, at a 10 percent import duty. Poland can import Bulgarian sunflower seeds year round at a preferential duty of 4.5 percent.

According to the free trade agreement with Turkey, Bulgaria can export sunflower-seed annually in the period January 1 - August 31 up to 25,000 MT quota (oil bearing and striped) at zero import duty. Bulgarian exports above this quota are imposed a duty of 28.2 percent (for 2000). In 2000, Bulgaria exported to Turkey 34,500 MT during the above period mainly via railway using DAF contract terms.

In MY01/02, the quota was also entirely used as the quantities exported above the quota were levied 27.9 percent import duty (for 2001).

TOTAL MEALS

PRODUCTION

General

Production estimates in the PS&D tables are derived using average industry rates for converting sunflower and soybeans. These crushing ratios have been revised and updated by the FAS office as follows: 82-85 percent for soybeans into meal; and 38 percent for sunflower seed into meal.

Bulgaria is normally a producer of soybean meal due to lack of raw materials. The sizable production reported in MY01/02, about 10,000 MT - 11,000 MT of soybean meal was produced from imported U.S. soybeans (12,000 MT). Sunflower meal is a secondary product for crushers after table oil and its not considered to be profitable. Therefore, oil drives the sunseed crush margins, while meal leads the soya crush margin.

CONSUMPTION

General

Consumption of meals is driven mainly by the development of the poultry industry which consumes about 70 percent of all soybean meal; followed by 20 percent use by the pork industry. The share of cattle and other type of livestock use is very small, about 5 to 10 percent combined.

Due to stabilization in the poultry industry in the last several years, and especially in MY01/02, imports and consumption of soybean meal increased. A positive trend is that an increasing number of poultry and feed operations are trying to improve the quality of their feed using higher protein content meals, so the increase in demand is driven not so much by the poultry census as by the improvement in feed quality. This has led to the establishment of small-medium size feed operations within livestock complexes which allows for better control on quality and production costs of locally manufactured compound feed. This trend is more typical for commercial operations due to increase in share of commercially produced poultry meat versus on-farm, non-commercial poultry production.

Total Poultry Inventory and Commercial Poultry Meat Production in Bulgaria for the period 1999-2001			
	1999	2000	2001
Poultry, total, inventory	14,963,142	14,990,946	15,000,000
incl. layers, numbers	8,304,375	7,882,629	8,000,000
Commercial poultry meat production, MT	25,167	27,000	35,000
Total poultry meat production, MT (commercial and non-commercial)	106,031	106,000	106,000

In the PS&D table, soybean meal consumption for MY00/01 was 46,000 MT and 70,000 MT in MY01/02. Reportedly, imports and consumption were higher both in MY99/00 and MY00/01. According to industry sources, imports in these two years were above 40,000 MT. Official figures are used in the PS&D tables.

The forecast for consumption in MY02/03 in the PS&D table is for a slight reduction in soybean meal consumption to 65,000 MT due to an expected increase in slaughter rates for pigs in 2002. This is a result of a decrease in farm-gate prices for live pigs in the first half of 2002. On the other hand, an expected good harvest and lower grain prices in 2002, should stimulate demand by livestock industry, both poultry and pork sectors, by the end of 2002 and into 2003.

TRADE

Trade data in the PS&D tables are on a marketing year basis. The trade matrices are based on official statistical data.

Imports

No imports of sunflower meal were registered between MY1999/00 and MY 01/02. No imports are expected for MY02/03.

Imports of soybean meal were driven by livestock demand (see consumption section), and exchange rate changes. Argentina remained the largest supplier of soybean meal to Bulgaria with a market share of 43 percent in MY00/01 and 37 percent in MY01/02. Brazil was second, with market shares of 32 percent and 33 percent, respectively. The United States increased its market share to 15 percent in MY00/01 and 10 percent in MY01/02. In addition to the U.S. government imports, commercial imports of U.S. meal were 1,038 MT in 2001. The forecast for 2002 is for about 5,000 MT of U.S. hi-pro meal imports of which 3,000 MT will be imported as a part of a donation program and the balance as commercial imports. Bulgarian can access U.S. export credit guarantee programs, and if used, imports of U.S. meal could increase to at least 10,000 MT per year overall.

Exports

Only small amounts of soybean meal were exported in the last three years at an average of 500 MT per year to Macedonia and Yugoslavia. Since amounts are small, these figures are not reflected in the trade matrices and PS&D table.

Sunflower meal was exported mainly to Turkey and Macedonia. In MY99/00, exports hit a record high of 54,000 MT, due to lower livestock demand in Bulgaria and good local supply. In MY00/01, local demand started to increase which led to some reduction in exports to 47,000 MT. In MY01/02, lower production and higher livestock demand led to record low exports of about 6,000 MT. The forecast for MY02/03 is for 6,000 MT exports due to more stable local demand for feed and expectations for similar domestic supplies as in MY01/02.

Import duties CY2002

HS#2304 Soybean meal - 0 percent import duty
HS#2306 30 Sunflower meal - 10 percent import duty

For EU:
HS#2306 30 Sunflower meal - 3 percent import duty in the period January 1 - June 30
Duty free in the period July 1 - December 31

For CEFTA countries and Croatia:
HS#2301-9 or all oil meals including soybean, sunflower and fish meal - duty free

Macedonia
HS#2307 00 - 200 MT duty free

TOTAL OILS

PRODUCTION

General

Bulgaria does not produce soybean oil due to lack of raw materials. In MY01/02, there was some production of oil of the local crushing of 12,000 MT of imported soybeans. The conversion rate was about 15 percent, and total production was 2,000 MT to 3,000 MT. Reportedly, this oil was mixed with sunflower oil marketed under the label of sunflower oil due to Bulgarian consumer preferences for sunflower oil. There were some attempts to market soybean oil as a new type of salad oil. However, these marketing ventures were limited due to the dominate role of sunflower oil in the market.

Other vegetable oils entered the market (with caution) this year: soybean oil, palm oil and rapeseed oil. Due to the increased role of imports (24,000 MT of non sunflower vegetable oils were imported in CY2001), it is expected that in 2002 and in 2003, there will be importers or crushers promoting other vegetable oils. This new trend is stimulated by increased income, development in consumer preferences for a better variety of cooking oils; the development of the food service sectors and tourist industry; and by limited local production of sunflower oil. If this trend is maintained, it is expected that local crushers will also start importing soybeans and other oilseeds for local crush (within 3-5 years).

Sunflower

In **MY99/00**, production of sunflower oil was estimated at 146,000 MT produced from 443,000 MT sunflower seeds at an average extraction rate of 33 percent. In **MY00/01**, production was estimated slightly higher at 152,000 MT produced from 465,000 MT at a lower extraction rate of 32.7 percent due to poor quality of the drought affected crop.

In **MY01/02**, crush consumption for oil was record low, 275,000 MT due to limited supply. Estimated oil production was 91,000 MT (33.1 percent extraction rate) with 117,000 MT - 135,000 MT local needs; 93,000 MT - 97,000 MT for households; and 24,000 MT to 38,000 MT for the industry. These needs are expected to be met by imports of vegetable oils, 25,000 MT to 30,000 MT to include both soya and palm oil.

As of April 2002, Bulgaria has already imported 14,000 MT of vegetable oils: crude sunflower oil from Ukraine, refined rapeseed oil from Germany, and soybean oil from Turkey and Israel. The data in the trade matrix for MY01/02 is for 10,000 MT imported in the period September ‘01 - April 2001. It is assumed that due to high world prices of sunflower oil, most of the demand will be met by imports of other vegetable oils (palm, soy and rapeseed).

CONSUMPTION

General

Soybean oil

Consumption of soybean oil in MY01/02 was mainly for household use. Due to lack of any reliable data, it is difficult to estimate the share of industrial consumption. According to some industry sources, total industrial consumption is about 2,000 MT to 3,000 MT for production of paints. No change in industrial consumption is expected in MY02/03.

Human consumption for soybean oil is forecast to stay stable with prospects for growth in medium term. In MY01/02, this type of consumption was significantly higher than in the previous years and was estimated to reach 10,000 MT. Locally produced soybean oil was about 3,000 MT, and the balance of 7,000 MT was imported soy oil.

Sunflower oil

In the PS&D table, consumption of sunflower oil is divided in industrial and food consumption. In Bulgaria, practically all sunflower oil is used for "human" consumption since industrial consumption is in the food processing industry. Therefore, in the category of "food consumption" in the PS&D table, there is data which covers about direct household consumption versus industrial consumption.

In **MY99/00**, consumption of sunflower oil was directed mainly for household use at 93,000 MT or 64 percent of local production. Industrial use was estimated at 37,000 MT or 25 percent of local output. Industrial use is mainly for canning, fish processing and confectionary industries (about 22,000 MT); for production of mayonnaise and margarine (14,000 MT as the content of sunflower oil in these two local products vary from 40 percent to 80 percent); and small amounts (1,000 MT) were used for technical purposes - for production of paints and varnishes. The most dynamic growth is registered for use of local sunflower oil for the local mayonnaise and margarine. In MY00/01, this specific use was estimated to increase to 16,000 MT.

In **MY00/01**, both households and industrial use were at slightly higher level of 95,000 MT, and 38,000 MT, respectively. In **MY01/02**, consumption for households is expected to decrease to 93,000 MT due to higher retail prices and the ability to substitute other types of vegetable oils at the same price. Industrial use is also expected to drop by 37 percent to 24,000 MT for the same reasons. Out of this total, about 7,000 MT are estimated to be used in the three major food manufacturing industries (see above); 15,000 MT for mayonnaise and margarine production and 2,000 MT for technical purposes. The prospect for **MY02/03** is for a slight increase in consumption both for industrial and food consumption due to expected better supply.

Prices

In **MY99/00**, producer prices of oil crushers (for bulk oil) were higher than the identical prices in most EU countries (for example, compared to the UK). The major reason was higher production cost of Bulgarian vegetable oils which is the result of higher production expenses due to depreciated equipment; lower oil content of local sunflower seeds; and lower oil extraction rates in the processing stage. Thus, producer prices varied from $760/MT in January ‘99 to $594 in December ‘00. Wholesale prices in MY99/00 gradually dropped from 1400 Bleva/MT ($760/MT) in September ‘99 to 1260 Bleva/MT ($594/MT) in April ‘00.

In **MY00/01**, the average monthly wholesale prices of sunflower oil were higher than in MY99/00 if calculated in local currency but lower if calculated in U.S. dollars due to higher average exchange rate. For example, in the period September - December 2000, prices were 1,540 Bleva/MT and 1,300 Bleva/MT versus 1,400 Bleva/MT and 1,240 Bleva/MT, respectively in MY99/00. In U.S. dollar terms, however, prices in 2000 were lower compared to 1999 and 1998 ($688/MT/September ‘00 to $594/December ‘00 versus $760/MT/September 99 and $641/MT/December 99). Export prices of sunflower oil in MY99/00, in period September 1999 - March 2000, were CFR $445-514/MT.

In **MY01/02**, Bulgarian producers’ bulk oil prices increased significantly in November/December 2001 by 300-600 Bleva/MT (1,635 Bleva/MT ($743/MT) - 1,830 Bleva/MT($831/MT) due to higher prices of the ‘01 sunflower crop and higher world prices of crude sunflower oil. In January 2002, these prices (wholesale refined bulk oil) reached the highest level over the last 4 years, 1,910 Bleva/MT ($868/MT). Retail sunflower oil prices reached a record high of 2.0 Bleva/liter ($0.91) in December 2001 and continued to be traded at about $1.0/liter in the first six months of CY2002. Expectations are that retail prices will remain at these levels until harvest of the 2002 crop due to high local and world sunflower seed prices and growing imports of vegetable oils to Bulgaria.

In MY01/02, CFR export prices of Bulgarian crude sunflower oil were between $388/MT and $403/MT. They were not affected by the dynamics of international prices since local exports are destined for Balkan region almost exclusively.

TRADE

General

Trade data in the PS&D tables and trade matrixes are on a marketing year basis and are official statistical data.

Exports

There were no exports of soybean oil for the last three marketing years and none are forecast.

Exports of sunflower oil in **MY99/00** were not significant due to large exports of raw sunflower seeds. Total sun oil exports reached 21,000 MT (or 52 percent lower than in the previous year). Out of the total exports, 9,700 MT were crude oil, and 11,000 refined oil. Major export destinations for crude oil were Macedonia and Turkey, and for refined oil - Albania and Yugoslavia.

In **MY00/01**, sun oil exports increased slightly to 26,300 MT of which 13,900 MT were crude oil and 12,400 MT were refined oil to traditional export destinations. Despite MinAg projections for exports of sun oil in **MY01/02** at 11,000 MT (6,000 MT crude and 5,000 refined oil), FAS Office estimates these exports will not exceed 5,000 MT. Bulgarian sun oil exports should allow a similar pattern in MY02/03 to previous year as supply and demand remain stable.

Export terms:

In 1999 - 2002, Bulgaria exported sunflower oil to EU, EFTA and Macedonia at general import duties for third countries.

The EU granted Bulgaria a duty free import quota for refined sunflower oil for 460 MT (July1, 1998-June 30, 1999); 480 MT (July 1,1999- June 30,2000) and 500 MT (after July 1, 2000) and 500 MT (July 1 ,2001 to June 30, 2002). However, Bulgaria rarely exports refined sunflower oil to the EU market due to its lower quality. As of February 2002, Bulgaria, for the first time, exported 450 MT. It is likely that the whole EU quota will be used in CY2002.

Bulgaria can export sunflower oil to Turkey within a quota of 15,000 MT for crude oil in the period January 1 - August 31 annually at a 50 percent reduction from the general duty which is 18.8 percent. In January- September 2000, Bulgaria exported only 834 MT crude oil to Turkey due to a high general import duty. No refined oil was exported to Turkey in that period. In 2001, Bulgarian exports to Turkey were 2,500 MT in crude oils and 100 MT in refined oils.

Bulgarian sunflower oil exports to CEFTA are levied at general import duties for third countries. Hungary has allowed import quotas for Bulgarian oil of 500 MT at 8 percent import duty. In 2001, Bulgaria did not export any sun oil under this quota.

Imports

Imports of sunflower oil in **MY99/00** were negligible (1,200 MT) of which 980 MT was refined oil and 250 MT was crude oil. In **MY00/01**, imports of oil started to increase due to local shortages and comparable prices of imported and local oil. Many crushing operations imported crude oils (other than sunflower oil), for further processing into the respective oil, and finally blending this oil with local sunflower oil. Reportedly, such mixes were done with small quantities of non-sunflower oil and the product is marketed as "sunflower oil" due to local consumer preference towards sun oil.

In CY2001, total imports of vegetable oils reached record levels of 24,000 MT of which soybean oil accounted for 47.5 percent (11,547 MT); palm oil, 46.8 percent (11,389 MT) and rapeseed oil for 5.7 percent. Although the U.S. share was small (1,100 MT of soy oil) at 4.5 percent, it has been estimated by the American Soybean Association that soybean oil imported from Israel, Greece and Turkey is produced from U.S. soybeans.

In **MY01/02**, import of various vegetable oils increased due to local shortages. However, sunflower oil imports were small due to high regional and world prices. For the period September - December 2001, imports of oils were 14,000 MT of which the major type was soybean oil, about 7,000 MT (see the attached trade matrix spreadsheet), followed by palm oil and rapeseed oil. Total imports of soybean oil for MY01/02 marketing year are expected to reach 12,000 MT.

The forecast for **MY02/03** is for a reduction in sunflower oil imports to about 20,000 MT and a slight increase in soybean oil imports to 13,000 MT.

Import duties:

HS# Product	CY1999 to CY2002 general import duties	EU import duties in CY2002
HS#1507 10 Crude and refined soy oil for food purposes	0%	0%
HS#1507 10 Crude and refined soy oil for non food purposes	6.5%	0%
HS#1512 11 Crude sunflower oil	10 % general duty, 10 % preferential duty	0%
HS#1512 19 Refined oil and for technical purposes	15% general duty, 15% preferential duty	0%

In 2000 - 2002, Bulgaria permitted imports of sunflower oil from CEFTA countries at general duties for third countries. This includes the Czech Republic, Poland, Slovenia, Slovakia (and Croatia in 2002).

Hungary had an import quota of 500 MT at 7 percent import duty for crude oil and 10 percent for refined oil. Romania had an import quota of 450 MT at 5 percent import duty for crude oil and 7 percent for refined oil. Imports from those countries above the quotas are imposed general import duties.

Turkey had an import quota of 500 MT for refined sunflower oil at 10.5 percent import duty. For the period January-September 2000, Turkey exported to Bulgaria total of 755 MT refined sunflower oil. Turkish crude oil is imported at general import duties. In 2001, Turkey exported 1,080 MT of refined sun oil to Bulgaria.

In 2001, from April 1 to July 31, Bulgaria allowed import tariff quota for duty free imports of crude and refined sunflower oil. In 2002, the GOB also introduced duty free imports with no quantitative limitations for crude sunflower oil in the period January 1 - July 31, 2002; and a duty free import quota of 5,000 MT for refined sunflower oil in the period June 1 - August 30, 2002.

Table # 1. Average Oilseed Farmgate Prices, 1999, 2000 and 2001 in Bleva per metric ton

Table #1. Average Oilseed Farmgate Prices, 1999, 2000 and 2001 in Bleva per metric ton				
	1998	**1999**	**2000**	**2001**
Sunflower	369,957	290,000	301,000	403,000
Soybean	472,764	375,000	550,000	500,000
USD/Bleva Exchange Rate, average	1,760	1.838	2.12	2.20

Table #2. Sunflower Refined Oil Commodity Exchange Spot Prices in 1999-2001, US$/MT

Table #7. Sunflower Refined Oil Commodity Exchange Spot Prices in 1999-2001, US$/MT			
Commodity type	**December 1999**	**December 2000**	**December 2001**
In Bulk	641	594	836
Bottled	1,066	770	1,000
Refined for Exports, EXW	567	391	722

Table #3. MY99/00 Trade data for soybeans and products.

MY99/00, Trade data, Imports, MT					
Soybeans		Soybean meal		Soybean oil	
Country	Quantity	Country	Quantity	Country	Quantity
Romania	1,515	Brazil	10,431	U.S.	78
Slovakia	1	Argentina	23,318	Yugoslavia	704
		Romania	40	Romania	343
		Greece	1,442	Germany	273
		Netherlands	20	Greece	736
		Italy	2	Italy	14
Total	1,516	Total	35,253	Total	2,160
MY99/00, Trade data, Exports, MT					
Soybeans		Soybean meal		Soybean oil	
Country	Quantity	Country	Quantity	Country	Quantity
Greece	8	Macedonia	272	0	0
		Yugoslavia	195		
		Moldova	30		
Total	8	Total	497	Total	0

Table #4. MY99/00 Trade data for sunflower and products.

MY99/00, Trade data, Imports, MT					
Sunflower seeds		Sunflower meal		Sunflower oil	
Country	Quantity	Country	Quantity	Country	Quantity
				NA	NA
Total	1,700	Total	0	Total	1,200
MY99/00, Trade data, Exports, MT					
Sunflower seeds		Sunflower meal		Sunflower oil	
Country	Quantity	Country	Quantity	Country	Quantity
Spain	74,300	Macedonia	1,907	Macedonia	7,757
Netherlands	30,700	Turkey	46,061	Turkey	1,099
Turkey	34,500	Russia	NA	Albania	6,019
Switzerland	18,200	Israel	NA	Yugoslavia	4,587
Denmark	16,100	Kazakhstan	NA	Other	1,292
Portugal	12,100	Greece	NA		
France	10,500				
Canada	9,000				
Italy	8,300				
Germany	5,700				
Total	277,000	Total	54,050	Total	20,711

Table #5. The PS&D table for MY99/00 for soybeans, soybean meal and soybean oil.

MY99/00 Soybeans and products, 000 HA and 000 MT					
Soybeans		Soybean meal		Soybean oil	
Area, planted	5	Crush	8	Crush	8
Area,harvest.	5	Extr. Rate	0.82	Extr. Rate	0.15
Beg Stocks	2	Beg Stocks	0	Beg Stocks	0
Production	6	Production	6	Production	1
MY Imports	2	MY Imports	35	MY Imports	2
From U.S.	0	from the U.S.	0	from the U.S.	0.07
Total Supply	10	Total Supply	41	Total Supply	3
MY Exports	0	MY Exports	0	MY Exports	0
Crush	8	Ind. Cons.	0	Ind. Cons.	0
Food	0	Food use	0	Food use	3
Feed	0	Feed use	39	Feed use	0
Total Cons.	8	Total Cons.	39	Total Cons.	3
End. Stocks	2	End Stocks	2	End Stocks	0
Total Distr.	10	Total Distr.	41	Total Distr.	3

Table # 6. The PS&D table for MY99/00 for sunflower, sunflower meal and sunflower oil.

MY99/00 Sunflower and products, 000 MT					
Sunflower seeds		Sunflower meal		Sunflower oil	
Area, planted	645	Crush	443	Crush	443
Area,harvest.	640	Extr. Rate	0.38	Extr. Rate	0.33
Beg Stocks	6	Beg stocks	11	Beg Stocks	18
Production	742	Production	168	Production	146
MY Imports	2	MY Imports	0	MY Imports	1
From U.S.	0	from the U.S.	0	from the U.S.	0
Total Supply	750	Total Supply	179	Total Supply	165
MY Exports	277	MY Exports	54	MY Exports	21
Crush	443	Ind. Cons.	1	Ind. Cons.	37
Food	23	Food use	1	Food use	93
Feed	3	Feed use	116	Feed use	5
Total Cons.	746	Total Cons.	172	Total Cons.	135
End. Stocks	4	End Stocks	7	End Stocks	9
Total Distr.	750	Total Distr.	179	Total Distr.	165

Table #7. MY01/02 Imports of vegetable oils (Sep/Dec 2001)

MY01/02 Imports of vegetable oils (Sep/Dec 2001), MT	
Crude sunflower oil	160
Refined sunflower oil	292
Soybean oil, various types	6,705
Palm oil, various types	4,849
Rapeseed oil, various types	1,181
Cotton oil	703
Total	13,890
Imports of vegetable oils in CY2001, MT	
Soybean oil	11,547
incl. US	1,097
Israel	1,794
Greece	4,146
Palm Oil	11,389
incl. Malaysia	4,368
Indonesia	2,006
Germany	1,799
Rape seed oil	1,377
Greece	1,176
Total oils	24,312

PSD Table, Oilseeds, Soybean

PSD Table						
Country	Bulgaria					
Commodity	Oilseed, Soybean				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2000		01/2000
Area Planted	0	2	0	1	0	3
Area Harvested	0	2	0	1	0	3
Beginning Stocks	0	2	0	1	0	1
Production	0	3	0	1	0	3
MY Imports	0	3	0	12	0	0
MY Imp. from U.S.	0	0	0	12	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	0	8	0	14	0	4
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Crush Dom. Consumption	0	7	0	13	0	3
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	0	0	0	0	0	0
TOTAL Dom. Consumption	0	7	0	13	0	3
Ending Stocks	0	1	0	1	0	1
TOTAL DISTRIBUTION	0	8	0	14	0	4
Calendar Year Imports	0	0	0	0	0	0
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

MY00/01 and MY 01/02 Import Trade Matrix, Soybeans

Import Trade Matrix			
Country	Bulgaria		
Commodity	Oilseed, Soybean		
Time period	MY01/02	Units:	MY00/01
Imports for:			1
U.S.	12,000	U.S.	
Others		Others	
Turkey	283	Romania	2807
		Greece	20
		China	2
		Belgium	2
Total for Others	283		2831
Others not Listed			
Grand Total	12283		2831

PSD Table, Soybean Meal

PSD Table						
Country	Bulgaria					
Commodity	Meal, Soybean				(1000 MT)(PER CENT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		10/2000		10/2001		10/2002
Crush	0	7	0	13	0	3
Extr. Rate, 999.9999	ERR	0.857143	ERR	0.846154	ERR	0.666667
Beginning Stocks	5	2	0	1	0	4
Production	0	6	0	11	0	2
MY Imports	90	39	115	62	0	60
MY Imp. from U.S.	0	6	0	6	0	6
MY Imp. from the EC	2	0	2	0	0	0
TOTAL SUPPLY	95	47	115	74	0	66
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	1	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	94	46	115	70	0	65
TOTAL Dom. Consumption	95	46	115	70	0	65
Ending Stocks	0	1	0	4	0	1
TOTAL DISTRIBUTION	95	47	115	74	0	66
Calendar Year Imports	0	0	0	0	0	0
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

MY00/01 and MY01/02 Import Trade Matrix, Soybean Meal

Import Trade Matrix			
Country	Bulgaria		
Commodity	Meal, Soybean		
Time period	MY01/02	Units:	MY00/01
Imports for:			1
U.S.	6452	U.S.	5651
Others		Others	
Brazil	20437	Brazil	12486
Argentina	23343	Argentina	16550
Greece	6972	Spain	1989
Croatia	2675	Yugoslavia	1632
Azerbaijan	1800	Greece	234
Hungary	100	Netherlands	58
Germany	18	Hungary	60
Nerthlands	1	India	18
Italy	724	Germany	15
Total for Others	56070		33042
Others not Listed	9		
Grand Total	62531		38693

PSD Table, Soybean Oil

PSD Table						
Country	Bulgaria					
Commodity	Oil, Soybean				(1000 MT)(PER CENT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2000		01/2000
Crush	0	7	0	13	0	3
Extr. Rate, 999.9999	0	0.142857	0	0.153846	0	0.333333
Beginning Stocks	0	0	0	0	0	1
Production	0	1	0	2	0	1
MY Imports	0	6	0	12	0	12
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	0	7	0	14	0	14
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	2	0	3	0	3
Food Use Dom. Consump.	0	5	0	10	0	10
Feed Waste Dom. Consum	0	0	0	0	0	0
TOTAL Dom. Consumption	0	7	0	13	0	13
Ending Stocks	0	0	0	1	0	1
TOTAL DISTRIBUTION	0	7	0	14	0	14
Calendar Year Imports	0	0	0	0	0	0
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Caldnr Yr Exp. to U.S.	0	0	0	0	0	0

MY00/01 and MY01/02 Import Trade Matrix, Soybean Oil

Import Trade Matrix			
Country	Bulgaria		
Commodity	Oil, Soybean		
Time period	MY01/02	Units:	MY00/01
Imports for:			1
U.S.		U.S.	
Others		Others	
Yugoslavia	632	Yugoslavia	2899
Macedonia	22	Romania	1306
Germany	51	Germany	791
Greece	13	Greece	496
		France	10
		Italy	42
		Argentina	12
		the Netherlands	1
Total for Others	718		5557
Others not Listed	5987		50
Grand Total	6705		5607

PSD Table, Sunflowerseed

PSD Table						
Country	Bulgaria					
Commodity	Oilseed, Sunflowerseed				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		10/2000		10/2001		10/2002
Area Planted	455	590	455	398	0	400
Area Harvested	450	560	330	389	0	400
Beginning Stocks	33	4	10	6	0	2
Production	420	558	310	392	0	450
MY Imports	1	3	15	7	0	3
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	454	565	335	405	0	455
MY Exports	70	60	80	97	0	100
MY Exp. to the EC	0	0	0	0	0	0
Crush Dom. Consumption	346	465	240	275	0	321
Food Use Dom. Consump.	14	32	5	29	0	30
Feed,Seed,Waste Dm.Cn.	14	2	5	2	0	2
TOTAL Dom. Consumption	374	499	250	306	0	353
Ending Stocks	10	6	5	2	0	2
TOTAL DISTRIBUTION	454	565	335	405	0	455
Calendar Year Imports	0	0	0	0	0	0
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

MY00/01 and MY01/02 Import Trade Matrix, Sunflowerseed

Import Trade Matrix			
Country	Bulgaria		
Commodity	Oilseed, Sunflowerseed		
Time period	MY01/02	Units:	MY00/01
Imports for:			1
U.S.		U.S.	
Others		Others	
Moldova	2958	Moldova	1066
Romania	2467	Ukraine	1000
Ukraine	100	Yugoslavia	394
Total for Others	5525		2460
Others not Listed	69		189
Grand Total	5594		2649

MY00/01 and MY01/02 Export Trade Matrix, Sunflowerseed

Export Trade Matrix			
Country	Bulgaria		
Commodity	Oilseed, Sunflowerseed		
Time period	MY01/02	Units:	MY00/01
Exports for:			1
U.S.		U.S.	
Others		Others	
Turkey	23728	Turkey	26607
Spain	22989	Syria	4184
Portugal	5354	Greece	4966
Syria	4103	Germany	2297
Greece	1296	Netherlands	716
Germany	519	Hungary	967
Total for Others	57989		39737
Others not Listed	33929		20367
Grand Total	91918		60104

PSD Table, Sunflower Meal

PSD Table						
Country	Bulgaria					
Commodity	Meal, Sunflower seed				(1000 MT)(PER CENT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		10/2000		10/2001		10/2002
Crush	346	465	240	275	0	321
Extr. Rate, 999.9999	0.453757	0.380645	0.458333	0.381818	0	0.380062
Beginning Stocks	7	7	0	17	0	0
Production	157	177	110	105	0	122
MY Imports	0	0	0	0	0	0
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	164	184	110	122	0	122
MY Exports	20	47	15	6	0	6
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	1	0	0	0	0	0
Food Use Dom. Consump.	1	0	0	0	0	0
Feed Waste Dom. Consum	142	120	95	116	0	116
TOTAL Dom. Consumption	144	120	95	116	0	116
Ending Stocks	0	17	0	0	0	0
TOTAL DISTRIBUTION	164	184	110	122	0	122
Calendar Year Imports	0	0	0	0	0	0
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

MY00/01 and MY01/02 Export Trade Matrix, Sunflower Meal

Export Trade Matrix			
Country	Bulgaria		
Commodity	Meal, Sunflowerseed		
Time period	MY01/02	Units:	MY00/01
Exports for:			1
U.S.		U.S.	
Others		Others	
Macedonia	1732	Turkey	23106
		Macedonia	641
Total for Others	1732		23747
Others not Listed	3925		23352
Grand Total	5657		47099

PSD Table, Sunflower Oil

PSD Table						
Country	Bulgaria					
Commodity	Oil, Sunflowerseed				(1000 MT)(PERCENT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		10/2000		10/2001		10/2002
Crush	346	465	240	275	0	321
Extr. Rate, 999.9999	0.404624	0.326882	0.395833	0.330909	0	0.330218
Beginning Stocks	18	9	10	3	0	1
Production	140	152	95	91	0	106
MY Imports	5	2	10	30	0	20
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	163	163	115	124	0	127
MY Exports	15	26	10	5	0	5
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	40	38	23	24	0	26
Food Use Dom. Consump.	93	95	76	93	0	95
Feed Waste Dom. Consum	5	1	4	1	0	0
TOTAL Dom. Consumption	138	134	103	118	0	121
Ending Stocks	10	3	2	1	0	1
TOTAL DISTRIBUTION	163	163	115	124	0	127
Calendar Year Imports	0	0	0	0	0	0
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

MY00/01 and MY01/02 Import Trade Matrix, Sunflower Oil

Import Trade Matrix			
Country	Bulgaria		
Commodity	Oil, Sunflowerseed		
Time period	MY01/02	Units:	MY00/01
Imports for:			1
U.S.		U.S.	
Others		Others	
Total for Others	0		0
Others not Listed	9980		2000
Grand Total	9980		2000

MY00/01 and MY01/02 Export Trade Matrix, Sunflower Oil

Export Trade Matrix			
Country	Bulgaria		
Commodity	Oil, Sunflowerseed		
Time period	MY01/02	Units:	MY00/01
Exports for:			1
U.S.		U.S.	
Others		Others	
Macedonia	1702	Macedonia	7672
Turkey	1313	Turkey	1174
Albania	1006	Greece	2411
Yugoslavia	721	Albania	6097
		Yugoslavia	5082
		Georgia	990
Total for Others	**4742**		**23426**
Others not Listed			**2798**
Grand Total	**4742**		**26224**