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Poultry and Products

Poultry Market 2000-2002

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Report Highlights:

The Bulgarian poultry industry saw stable development over the last 4 years with growing production. Local demand and consumption are increasing due to growth in the retail and food service sectors. Total imports continue to increase with the majority of imports in turkey meat used both for meat processing and direct consumption. First-half-of-2002 import data show record poultry imports (January-June). The United States continues to be a leading poultry supplier and good export opportunities are forecast in 2003.

Includes PSD changes: Yes
Includes Trade Matrix: No
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Executive Summary

The development of the poultry market in Bulgaria has been stable over the last 4 years with steady growth in production, and faster growth in consumption. In 2001, despite stable local production, competitive international prices led to a significant increase in poultry imports by 3,000 MT or by $1.0 million. Bulgaria continues to be a net importer of poultry meat (chicken and turkey) in 2002. Demand was spurred through increasing consumption by food service outlets, tourist industry and growing supermarket sales. Over the last 4 years, annual growth in consumption of poultry meat was 5-7 percent (Source: Association of Poultry Producers/APP). Egg consumption remained flat at 130-140 eggs per person annually.

Forecasts for 2003 are for stable local chicken meat supply with further growth. Producers have begun investing seriously in stock and facilities. Product assortment and diversification tactics improved by increasing the variety of poultry cuts, the share of semi-processed poultry products, and the share of chilled versus frozen poultry meat. Investment in marketing of chilled poultry products is viewed as a major tool to compete with imported frozen chicken. Despite these efforts, it is not likely that the local industry will be able to successfully compete with imported U.S. frozen chicken leg quarters in terms of price and quality.

To date, Bulgaria has no commercial production of turkey and all turkey consumption comes from imports. Despite the growing local demand for turkey meat and products, there are no industry plans for investment in local turkey production. Therefore, turkey meat imports will continue to increase and enjoy good demand for both processing and direct consumption.

The major U.S. products sought by Bulgarian buyers are frozen chicken leg quarters, turkey parts and turkey MDM. The demand for higher value added poultry products has increased over the last two years. However, more expensive value-added products are not dominating imports. Most U.S. poultry exports to Bulgaria arrive in trans-shipments via Greece (therefore, these exports are often reported as of Greek origin). In 2000 and 2001, the major U.S. competitors were France and Belgium (for turkey meat); and Hungary and Brazil (for chicken meat).

PRODUCTION

General

The poultry industry in Bulgaria underwent a very difficult restructuring over the last 10 years. As of 2002, there are 85 commercial poultry farms for production of poultry meat and eggs. Out of these 85 farms, there are about 10 leading producers of eggs and 5 leading producers of chicken meat. All poultry industry assets are in private hands.

Poultry stocks in 2001 consisted of about 15 million birds of which 8.0 million were layers (8.5 million according to other sources) and 5.0 million were broilers. Commercially raised layers total 2.5 million (APP data). Information about turkey inventory numbers is not available. Currently, Bulgaria has only 3 small turkey farms.

Parent stocks are as follows: parent stocks for broilers 350,000-380,000; parent stocks for egg production 280,000-340,000; and grandparent stocks 10,000. Bulgaria also has 3,000 parent stocks for turkey which is not sufficient for developing commercial turkey production.

Poultry production in 2001 consisted of 108,000 MT of poultry meat (110,000 MT according to other sources): 1,200 MT of liver from geese and ducks, and 1,574 million eggs. According to the APP, commercially produced chicken meat totaled 42,000 MT.

As of the beginning of 2002, total poultry stocks had increased slightly (less than one percent) with a more significant growth for layers of 8 percent. Production in 2002 is estimated to reach 110,000 MT of meat and 1,600 million eggs. Good feed supplies and lower feed prices in 2002 are expected to stimulate production. The same trend of stable growth in supply is expected for 2003. AgOffice estimates forecast 2003 production at 112,000 MT of meat and 1,650 million eggs.

Production data in the PSD chicken table is based on statistical data for slaughtered poultry, industry estimates and public data of the National Poultry Association. Due to the relatively small share of commercially produced broiler meat, the GAIN, PSD table for chicken includes commercial and non-commercial production.

Egg production data in the PSD table is based on same sources of official and industry information. The forecast for 2002 and 2003 is for higher levels of production due to the increased number of layers and improved productivity due to better feed.

Production Factors

Feed: The good grain crops in 2002 and in 2001, along with low prices, improved domestic grain supply/feeding. Use of imported protein such as soybean meal in 2001 and 2002 was higher due to successful expansion of the local poultry industry and lower prices (about US$240-260/MT). As a result, feed efficiency increased.

According to the latest unofficial trade data, soybean meal imports increased significantly in 2002. Recent trade data for imports for the period July 1 - October 15 or for the last three and half months show soybean meal imports of 27,000 MT or an average of 9,000 MT per month which is almost double import levels in the previous years (5,000 MT/month, ref: BU#2007). Increased imports are estimated to be stimulated by growth in the poultry industry followed by the pork industry.

Genetics: In 2001 and 2002, the demand for genetic materials such as hatching eggs, one-day-old chicks, and layers increased. Most of the genetic materials were imported from Hungary, the Netherlands, Denmark, and France. Hybrids used in egg production have the potential for 300 eggs per year: Hysex-Brawn, Isa-Brawn, Tetra-SL, Bovans, DeKalb etc.

Production Problems

Over the last two years, the APP has been very active seeking solutions to industry problems. According to the APP, the major problems currently are:

- Difficult implementation and observation of newly adopted EU regulations for animal health programs, HACCP, hygiene standards, animal welfare, etc. Lack of well established relations between the state veterinary service and poultry producers leads to weaknesses in the food safety regulations implementation.

- The large "gray" sector in poultry production, or non-registered producers who do not respect veterinary or taxation laws and dump lower quality product on the market; unfair competition among market players;

- Lack of accurate, timely and precise price information as well as general marketing information both for the local market and for the international market;

- Lack of efficient legal protection of brand names;

- Lack of R&D in the poultry industry;

- No state support for exports of poultry products; no export subsidies or preferences;

The poultry industry’s efforts in 2002 an 2003 are focused on:

- promotion and marketing aimed at an overall increase in poultry meat consumption;

- improved marketing of eggs including proper marking and dating of eggs, sorting and grading as well as appropriate storage.

- higher sales of chilled meat versus frozen meat;

- maintenance of lower wholesale and retail prices compared to red meats;

- increased supply of value added products such as greater diversity of cuts; processed or semi processed cuts for the retail and food service sectors;

Production of chicken meat was increasingly commercialized over the past 2-3 years. The commercial share of production gradually increased from 25,000 MT in 1999 to 36,000 MT in 2000 and 42,000 MT in 2001. This share is expected to reach 50,000 MT in 2003. As of today, most commercial producers have vertically integrated operations which include parent stocks, hatching operations, slaughter houses, feed mills and storage facilities. The main purpose of vertically integrated operations is to control the feed quality and to improve efficiency.

Production costs

Chicken production costs: Commercial chicken operations produce 1.8-2.0 kilo broilers in 42-45 days with a 2.0-2.2. feed ratio per a kilo of growth. Their production costs in 2001 were between $0.35 to $0.75/kilo of live weight. A significant factor for production costs was the price of day-old chicks which averaged about $0.27/chick in 2001.

Production costs declined from 1997 levels (Table#3) to reach $0.65/kilo in 2001. Compound feed continued to account for the largest share in production costs, of about 70 percent. In 2001, compound feed prices varied from $235/MT to $275/MT. Usually, the peak in feed prices is in July/August and the lowest price is registered in January. The same trend is seen for compound feed for layers.

Egg production costs: Production of eggs faces similar problems as the chicken meat sub-sector. Over the last 5 years, there were 14 newly established modern egg farms.

Feeding of layers significantly improved in 2001/02. Most operations stopped using cheap, low quality feed. Another change was improved application of veterinary immune programs, hygiene practices and prophylactics with the final goal to reduce production costs. As a result, production costs in U.S. dollars per egg has been gradually reduced since 1997 to reach $0.036/egg (see Table#3) at present. Production costs vary from $0.034 to $0.042 at commercial operations with an average feed conversation rate of 150 grams. Feed accounts for 65-70 percent of production costs. Therefore, feed prices had the largest impact on total production costs. During 2001, the compound feed prices for layers varied from $203/MT to $230/MT.

The average productivity per layer in 2000 was 185 eggs total. The reason for this low productivity is because the largest portion of layers are found on small to medium sized farms with productivity of between 156 to 180 eggs/layer. In larger commercial farms, this figure is 280 eggs/layer annually.

The local poultry industry considers the chicken and egg production costs high when compared to world standards. Efforts for further efficiencies continue. Current industry initiatives are directed at improved quality of compound feed, introduction of good manufacturing practices and food safety standards.

Egg powder: Production of egg powder is limited to one large operation and several smaller facilities attached to larger egg farms. Annual production is 800-900 MT and does not meet local demand. Usually, egg powder is produced from less expensive imported eggs. To date, there has been no investment in processing of eggs into powder despite the demand for this product and increasing imports. According to the APP, some investment in this area is planned for 2003.

Diseases: No significant diseases were reported in 2000-2002. Prior to 2000, there were several cases of pseudo-plague. However, actions were taken immediately and the disease was eradicated.

Quality, Prices and Stocks: Despite recent improvement in economic efficiency and quality, overall production inefficiencies and the lack of quality feed continues to produce smaller and tougher broilers. This, along with uncompetitive prices, and hygiene/veterinary limitations (i.e. not to the EU standards), have prohibited Bulgaria from exporting chicken to Western markets. However, as of 2002, a few large producers improved the quality as well as efficiency. Therefore, it can be expected in the medium term, by 2004, local production will compete more successfully with imports. Local producers do not have a policy of trying to compete with imported frozen chicken leg quarters. Therefore, this imported product will continue to enjoy a stable market niche due to its price competitiveness. Since local supply does not fully meet demand, local poultry industry efforts are focused on meeting local demand rather than on exports.

Prices

Poultry meat

The 2001 farm gate prices for chicken broilers were between $0.70 to $0.90/kilo in live weight. These prices were on average 10 percent higher than in 2000 due to higher prices of feed (see Table#4).

Wholesale prices of frozen chicken did not experience wide fluctuations and thus varied from $1.54/kilo to $1.67/kilo. Prices were lower during summer months, May to July, and higher prices were registered during the August-October period. On average, wholesale prices in 2001 were 13 percent higher than in 2000. In November 2001, a reduction in prices began which continued to date. The highest registered prices were $1.74/kilo and the lowest was $1.40/kilo.

Retail prices followed the wholesale prices trends. The highest chicken meat prices were registered in the regions of Gabrovo, Lovetch and Vidin due to their distance from suppliers. Average annual retail prices of whole frozen chickens were $1.84/kilo.

In 2002, the forecast for average annual prices is as follows: farmgate prices for broilers, $0.87/kilo; wholesale prices: chickens $1.75/kilo and $0.075/egg; retails prices: frozen whole chickens $1.95 and $0.09/egg

Eggs

Wholesale egg prices in 2001 were relatively stable. Prices declined from $0.07/egg in February 2001 to $0.05/egg in June; and increased from July to December when they reached $0.07/egg. The maximum registered price was $0.08/egg and the lowest was $0.048/egg.

Average 2001 retail price was $0.08/egg (7 percent higher than in 2000) with the lowest level in June $0.065/egg and the highest in January-February. There is usually seasonal peak in retail prices around Easter (end of April or early May).

Prices of eggs over the last 3 years registered regular seasonal fluctuations. The highest prices were reached in January-February when prices were 25 percent higher than the average annual prices; and the lowest prices were registered in July-August. The usual margin between the wholesale and retails prices is about 14 percent with some fluctuations of up to 25 percent.

PSD Table, Chicken

PSD Table						
Country	Bulgaria					
Commodity	Poultry, Meat, Broiler				(1000 MT)(MIL HEAD)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Inventory (Reference)	65	70	0	72	0	73
Slaughter (Reference)	40	43	0	44	0	45
Beginning Stocks	3	3	0	3	0	3
Production	100	108	0	110	0	112
Whole, Imports	1	0	0	0	0	0
Parts, Imports	13	13	0	14	0	13
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
TOTAL Imports	14	13	0	14	0	13
TOTAL SUPPLY	117	124	0	127	0	128
Whole, Exports	5	0	0	0	0	0
Parts, Exports	1	1	0	1	0	1
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	6	1	0	1	0	1
Human Consumption	98	110	0	113	0	114
Other Use, Losses	11	10	0	10	0	10
Total Dom. Consumption	109	120	0	123	0	124
TOTAL Use	115	121	0	124	0	125
Ending Stocks	2	3	0	3	0	3
TOTAL DISTRIBUTION	117	124	0	127	0	128
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Import Trade Matrix, 2000 and 2001, Chicken Meat, MT

Import Trade Matrix			
Country	Bulgaria		
Commodity	Poultry, Meat, Broiler		
Time period	2000	Units:	2001
Imports for:			1
U.S.	1,970	U.S.	1,605
Others		Others	
Belgium	1,371	Brazil	1,528
Germany	400	Hungary	1,053
Brazil	386	The Netherlands	1,227
The Netherlands	632	Belgium	730
Greece	525	Turkey	670
Hungary	410	Greece	605
Denmark	120	Cyprus	184
Canada	10		
Turkey	10		
Total for Others	3864		5997
Others not Listed	373		1,066
Grand Total	6207		8668

Export Trade Matrix, 2000 and 2001, Chicken Meat, MT

Export Trade Matrix			
Country	Bulgaria		
Commodity	Poultry, Meat, Broiler		
Time period	2000	Units:	2001
Exports for:			1
U.S.		U.S.	
Others		Others	
Greece	287	Macedonia	524
Moldova	97	Ukraine	40
Macedonia	83	Georgia	92
Belgium	424	Belgium	216
Yugoslavia	72	Yugoslavia	104
France	13	Azerbaijan	24
Russia	25		
the Netherlands	20		
Total for Others	1021		1000
Others not Listed	156		164
Grand Total	1177		1164

PSD Table, Turkey Meat

PSD Table						
Country	Bulgaria					
Commodity	Poultry, Meat, Turkey				(1000 MT)(MIL HEAD)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Inventory (Reference)	0	0	0	0	0	0
Slaughter (Reference)	0	0	0	0	0	0
Beginning Stocks	1	1	0	1	0	1
Production	3	3	0	3	0	3
Whole, Imports	0	0	0	0	0	0
Parts, Imports	13	15	0	16	0	16
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
TOTAL Imports	13	15	0	16	0	16
TOTAL SUPPLY	17	19	0	20	0	20
Whole, Exports	0	0	0	0	0	0
Parts, Exports	1	0	0	0	0	0
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	1	0	0	0	0	0
Human Consumption	16	17	0	18	0	18
Other Use, Losses	0	1	0	1	0	1
Total Dom. Consumption	16	18	0	19	0	19
TOTAL Use	17	18	0	19	0	19
Ending Stocks	0	1	0	1	0	1
TOTAL DISTRIBUTION	17	19	0	20	0	20
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Import Trade Matrix, 2000 and 2001, Turkey Meat, MT

Import Trade Matrix			
Country	Bulgaria		
Commodity	Poultry, Meat, Turkey		
Time period	2000	Units:	2001
Imports for:			1
U.S.	3,497	U.S.	1,947
Others		Others	
France	3,440	France	5,410
Belgium	2,927	Belgium	2,434
The Netherlands	1,900	The Netherlands	1,583
United Kingdom	774	United Kingdom	768
Spain	367	Canada	694
Cyprus	130	Spain	810
Germany	572	Germany	524
Denmark	464	Greece	401
Hungary	280		
Total for Others	10854		12624
Others not Listed	331		650
Grand Total	14682		15221

Export Trade Matrix, 2000 and 2001, Turkey Meat, MT

Export Trade Matrix			
Country	Bulgaria		
Commodity	Poultry, Meat, Turkey		
Time period	2000	Units:	2001
Exports for:			1
U.S.		U.S.	
Others		Others	
France	13	Belgium	284
Belgium	632	France	150
Total for Others	645		434
Others not Listed	2		
Grand Total	647		434

PSD Table, Eggs

PSD Table						
Country	Bulgaria					
Commodity	Poultry, Eggs				(MIL HEAD)(MIL PCS)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Layers	9	8	0	8	0	0
Beginning Stocks	0	0	0	0	0	0
Production	1650	1574	0	1600	0	1650
Hatch Eggs, Imports	0	0	0	0	0	0
Shell Eggs, Imports	90	6	0	6	0	6
Other Imports	0	0	0	0	0	0
Intra EC Imports	0	0	0	0	0	0
TOTAL Imports	90	6	0	6	0	6
TOTAL SUPPLY	1740	1580	0	1606	0	1656
Hatch Eggs, Exports	0	0	0	0	0	0
Shell Eggs, Exports	10	24	0	30	0	35
Other Exports	0	0	0	0	0	0
Intra EC Exports	0	0	0	0	0	0
TOTAL Exports	10	24	0	30	0	35
Hatch Eggs,Consumption	510	450	0	460	0	471
Shell Eggs, Human	1180	1080	0	1080	0	1100
Shell Eggs,OT.Use/Loss	20	15	0	18	0	20
Other Dom. Consumption	20	11	0	18	0	30
Total Dom. Consumption	1730	1556	0	1576	0	1621
TOTAL Use	1740	1580	0	1606	0	1656
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	1740	1580	0	1606	0	1656
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0

Import Trade Matrix, 2000 and 2001, Eggs, in number of pieces

Import Trade Matrix			
Country	Bulgaria		
Commodity	Poultry, Eggs		
Time period		Units:	numbers
Imports for:	2000		2001
U.S.		U.S.	
Others		Others	
France	1,882,000	France	410,000
Czech Republic	300,000	Greece	1,388,000
Yugoslavia	452,000	Macedonia	1,134,000
Turkey	315,000	Turkey	360,000
The Netherlands	324,000	Yugoslavia	237,000
Total for Others	3273000		3529000
Others not Listed	672,000		2,131,000
Grand Total	3945000		5660000

Export Trade Matrix, 2000 and 2001, Eggs, in number of pieces

Export Trade Matrix			
Country	Bulgaria		
Commodity	Poultry, Eggs		
Time period		Units:	numbers
Exports for:	2000		2001
U.S.		U.S.	
Others		Others	
Hungary	2,970,000	Hungary	3,387,000
Ukraine	2,485,000	Ukraine	4,649,000
Iraq	4,370,000	Yugoslavia	1,443,000
Yugoslavia	9,543,000		
Total for Others	19368000		9479000
Others not Listed	387,000		15,177,000
Grand Total	19755000		24656000

CONSUMPTION

Poultry meat

Consumption of poultry meat, both chicken and turkey, registered stable growth over the last 4 years. The prospects are for continued stable growth in the short-medium term. The most significant change was the increase in consumption of turkey meat due to the demand for meat processing. As of 2002, consumption of chicken meat is about 120,000 MT - 125,000 MT forecast to increase to 130,000 MT by 2005. Turkey meat consumption is about 18,000 MT - 20,000 MT currently with prospects to grow to 25,000 MT for the same period. Out of total turkey consumption, it is estimated that at least 14,000 MT are consumed by the meat processing industry in the form of MDM or meat.

Consumption of poultry meat faced several major characteristics in the last 3 years:

- The share of poultry meat in total meat consumption increased from below 20 percent to about 25 percent (APP data). This change was due to the general consumer preferences toward healthier foods and due to substitution of poultry meat (replacing bef) both by direct consumers and by meat processors (due to food safety concerns).

- Another reason for the higher consumption was lower chicken/turkey meat prices compared to pork and beef.

- The fast growth in the meat processing industry has led to increased processing of poultry meat for production of ready and semi ready poultry products. Increased demand for chilled chicken meat also contributed to higher overall demand and consumption.

According to recent studies supported by the APP and Ministry of Agriculture, the elasticity index for consumption of poultry meat for the period 1998-2000 was 1.48 percent and for eggs 2.78 percent. This is much lower than the same index for beef, 2.75 percent, and pork, 3.74 percent, which explains the relative stability in consumption. The elasticity index of demand-to-income for poultry meat was 1.85 percent; and for eggs 2.74 percent compared to an average 1.98 percent for livestock products. This index in the EU countries is 0.3 percent which shows that consumption levels are independent from income.

According to the National Statistics Institute (official data), annual per capita consumption in 1999-2002 was as follows:

Annual consumption of poultry meat and eggs per capita in 1999-2002 in Bulgaria				
	1999	2000	2001	2002F
Poultry meat, kilos	5.1	9.5	11	12
Eggs, number	137	130	135	135

The AgOffice estimates differ from official statistics which record mainly "purchased" quantities rather than "consumed" products. The AgOffice estimate for chicken meat consumption per capita in 2001 is at 15 kilos; 15.4 kilos in 2002 and 15.5 kilos in 2003. Turkey meat consumption is forecast at 2.2 kilos in 2001, and 2.4 kilos in 2002 and 2003. Thus total poultry meat consumption is 2002 is estimated at 18.0 kilos per capita. These figures show the good potential of the local market which enjoyed consumption levels of 25-30 kilos per capita prior to 1990.

Eggs

Unlike increasing poultry meat consumption, human consumption of eggs stagnated. Over the last 3 years, this type of consumption was declining for several reasons:

- Unlike poultry meat, lower egg prices and higher income of consumers do not usually lead to higher consumption.

- There are changing consumer preferences towards consumption of healthier food products. According to the APP, egg consumption can increase slightly in the future at no more than 1-2 percent annual growth provided that prices and supply remain flat.

- Consumption of hatching eggs increased due to good feed supply thus stimulating production.

TRADE

The data in the trade matrixes is based on official statistical data. Please, note that trade data for poultry meat is in metric tons in trade matrixes and in thousand metric tons in the PSD table. Trade data for eggs is in number of pieces in the trade matrixes and in millions of pieces in the PSD table. Due to lack of complete 2001 trade data by destination for egg trade, total exports and imports of eggs in the trade matrixes is for the whole of 2001 year. Trade data by destinations is based on official figures for the first 9 months of 2001.

Exports

Chicken meat: The major portion of total poultry exports, chicken meat, declined due to low price/quality competitiveness of Bulgarian chickens. Bulgaria does not have any EU approved chicken slaughtering houses which can export to the EU.

- In 2000, exports were negligible, 1,200 MT, of which 580 MT was whole frozen chicken, exported mainly to Georgia (300 MT); 570 MT of frozen cuts, exported mainly to Belgium (424 MT) and some minor exports of chilled products exported to neighboring Balkan countries.

- In 2001, chicken exports were 1,200 MT, of which 500 MT frozen cuts, mainly Belgium (220 MT) and Macedonia (110 MT). Other exports were whole frozen chicken, 290 MT, to Macedonia (136 MT) and Georgia (92 MT); and 346 MT of whole chilled chicken exported to Macedonia, 280 MT and Ukraine, 40 MT.

Turkey meat: Bulgaria is a net importer of turkey meat. Limited local production does not allow for significant exports. In 2000, turkey exports were only 650 MT of which 630 MT were frozen cuts exported to Belgium. In 2001, turkey exports were even lower at 434 MT of frozen cuts exported to Belgium (284 MT) and France (150 MT).

Other poultry meat products: Bulgaria is exporting mainly goose and ducks products, liver, meat and other edible offal. Bulgaria has 8 EU-licensed slaughter houses for exports of meat and liver from ducks and geese. This meat is reportedly used for further processing (i.e.pate).

In 2000, these exports (total 3,200 MT) consisted of 400 MT of chilled liver exported to France (290 MT) and Belgium (100 MT); 990 MT chilled cuts, exported to France (740 MT) and Belgium (164 MT); and 1,800 MT other edible offal exported to the same export market, France (1,700 MT) and Belgium (100 MT). These products, however, although small in tonnage, bring significant revenue to the country due to their high price (about $12 million).

In 2001, total exports of these products (3,906) MT consisted of 442 MT of liver, all exported to France; 970 MT of chilled meat cuts exported to France (900 MT) and Belgium (62 MT); and 2,500 MT of frozen cuts, exported to France (2,150 MT) and Belgium (250 MT). Although final trade figures are not available, the value of these exports for 2001 is estimated at about $14 million.

Eggs: Bulgarian eggs, in general are not price/quality competitive on the world market as is the case with Bulgarian poultry meat. However, due to recent investment and improvement of efficiency and quality, Bulgaria may have the potential to increase egg exports.

In 2000, egg exports were about 20 million of which 10 million eggs for hatching and the other half was eggs for consumption. Hatching eggs were exported mainly to Hungary (3 million) and Iraq (4 million); and eggs for consumption were exported to Yugoslavia. Exports to Iraq were done under the UN programs.

In 2001, egg exports totaled 24-25 million pieces. The data for the first 9 months of 2001 shows exports of 14 million hatching eggs, exported mainly to Hungary (3 million) and Ukraine (5 million); and exports of 3 million eggs for consumption exported mainly to Yugoslavia (1.5 million).

Imports

Note that import figures in the PSD chicken table are different than those in trade matrixes. Figures in the PSD table are AgOffice estimates of an actual imports which are based mainly on unofficial trade data and include so called illegal imports (imports of chicken meat declared as a different than chicken meat poultry product, or non registered by authorities imports). Data in the trade matrixes is based on official Bulgarian Customs data.

Chicken meat: Imports of chicken meat continue to be difficult for the majority of importers due to the prohibitively high duties which push imports in the "grey" sector and force importers to seek various illegal ways to avoid payment of duties and fees. At the same time, stable and growing local demand continues to stimulate imports.

- In 2000, imports of chicken meat were 6,200 MT per official statistics. Other unofficial estimates are as high as 14,000 MT. According to the APP observations and trade information, most imports declared as "poultry waste" (11,000 MT), were actually chicken meat. According to some unofficial sources, all these imports consisted of chicken meat which means that the actual annual chicken meat imports were probably higher, about 17,000 MT.

Based on the official data for 2000, Bulgaria imported 2,100 MT of whole frozen chickens with a major supplier Belgium (600 MT). Official data also show 4,100 MT of frozen chicken cuts (leg quarters), with a major supplier being the United States (4,100 MT) followed by Belgium (780 MT) and Brazil (390 MT).

- In 2001, imports of chicken meat were 8,700 MT total of which the bulk was frozen chicken cuts, mainly leg quarters at 6,400 MT. The major supplier was Brazil with 1,530 MT, followed by the United States with 1,500 MT; other imports included 2,200 MT of whole frozen chicken with the major suppliers Belgium (730 MT) and Turkey (670 MT). The smallest portion was chilled cuts, 160 MT, with the major supplier USA (100 MT). The AgOffice estimate for the 2001 imports is at 13,000 MT.

Turkey meat: Imports of turkey meat significantly increased in the last 5 years due to the demand for both meat processing and direct human consumption.

Bulgaria does not traditionally consume turkey. Direct human consumption is still concentrated around holidays. However, due to increased supply of frozen raw turkey cuts and processed turkey cuts such as cured, salted, etc, this type of consumption increased.

The bulk of turkey meat imports, however, continue to be used mainly for processing. According to trade information, the turkey meat in highest demand for processing is boneless turkey meat as well as drumsticks and legs. The processing industry views this meat as the best substitute for beef in terms of quality characteristics for processing, food safety and price.

- In 2000, turkey imports were record high at almost 15,000 MT. Out of these total imports, the bulk was imports of frozen cuts, 14,000 MT, with major suppliers being the United States (3,500 MT) followed by France and Belgium. Imports of other categories were small: 320 MT of chilled turkey cuts (Spain, 270 MT); and 110 MT of whole frozen turkey (United Kingdom, 40 MT).

- In 2001, total turkey imports increased to 15,200 MT with the major share in frozen cuts, 14,200 MT. The main exporters were France (5,400 MT), Belgium (2,400 MT) and USA (1,400 MT). The next largest category was chilled cuts, 870 MT, with the USA as a major supplier (490 MT). Imports of whole frozen turkeys were about 200 MT of which 80 MT imported from USA.

Eggs: Imports of eggs started to decline in 2000 and in 2001. Total eggs imported in 2000 were about 60 percent lower than in 1999 as the highest was the drop in eggs for consumption by 92 percent. This was a result of lower local consumption due to increased prices during the year. This trend continued in 2001 and in 2002. Total egg imports are forecast to remain stable fluctuating between 4 and 6 million pieces by 2003-2005. In general, imports of eggs for consumption are forecast to decrease due to the improving supply and quality of local eggs. Imports of hatching eggs have an opposite trend related to the development of the industry and the need for improved genetics.

In 2000, egg imports were 4 million pieces of which 3.2 million were hatching eggs and the rest were eggs for consumption. The major supplier of eggs was France (1.9 million). In 2001, total egg imports were 6 million. Data for the first 9 months of 2001 showed imports of 2.8 million eggs for consumption, mostly from Greece (1.4 million) and Macedonia (1.1 million). Hatching eggs imports were 1.4 million with a major suppler being France (half a million pieces).

Unlike egg imports, processed eggs, egg powder and dried egg yolks imports started to increase in 2000. Thus, imports in 2000 were 74 percent higher than in 1999 and continued to grow in 2001 by another 14 percent. This is related to favorable local demand for these products as raw materials for the confectionary and food processing industries. The major suppler of these products to Bulgaria is Austria.

US exports to Bulgaria: The major U.S. poultry products exported to Bulgaria in 2001 (official data) and the first half of 2002 were:

Chicken meat, 2001 imports:

HS# 0207 12 whole frozen chickens
- 2,126 MT ($1.4 million); USA - 51 MT ($23 thousand);
HS# 0207 13 fresh and cooled leg quarters
- 156 MT ($80 thousand), USA 95 MT ($59 thousand);
HS# 0207 14 frozen leg quarters
- 6,386 MT ($2.6 million), USA 1,460 MT ($635 thousand)
Total USA - 1,606 MT ($0.7 million)

Turkey meat, 2001 imports:

HS# 0207 25 whole frozen birds
- 192 MT ($77 thousand), USA 79 MT ($35 thousand);
HS#0207 26 cuts, fresh and cooled
- 867 MT ($250 thousand), USA 489 MT ($152 thousand)
HS# 0207 27 frozen cuts
- 14,161 MT ($4.8 million), USA 1,379 MT ($ 460 thousand);
Total USA - 1,946 MT ($0.647 million)

According to official customs data for the first six months of 2002, poultry imports hit record highs for the first six months of any calendar year period and reached 17,000 MT. Total U.S. exports for this period were 6,700 MT ($3.8 million) or 84 percent higher than the total annual 2001 exports. See detailed trade data for imports in the first six months of 2002 in the table below.

Poultry Imports in the first six months in 2002

Total Poultry Imports in the fist half of 2002, in MT		
Country	Volume, MT	Value, thousand US dollars
USA	4,586	1,820
Belgium	2,486	1,142
France	1,912	544
The Netherlands	1,844	868
Brazil	1,629	446
Hungary	1,154	498
Total	17,417	6,984
Imports of "poultry waste", HS#0504 in the first half of 2002		
USA	881	208
Greece	340	82
Brazil	253	56
Total	1,976	725
Chicken meat imports in the first half of 2002		
HS# 0207 12 whole frozen birds	1,418	892
Belgium	438	290
The Netherlands	357	301
Turkey	267	164
USA	118	53
HS#0207 14 frozen cuts	6,783	2,722
USA	3,352	1,398
Brazil	1,385	353
Hungary	919	422
Greece	308	66

Turkey meat imports in the first half of 2002		
HS#0207 26 cuts fresh or chilled	211	80
USA	71	26
Canada	69	23
HS#0207 27 cuts, frozen	8,941	3,245
France	1,912	544
Belgium	1,783	657
Holland	1,316	441
USA	1,043	337

Trade regime

General import duties:

Chicken:
0207 11 10 0, 0207 11 30 0, 0207 11 90 0, 0207 12 10 0, 0207 12 90 0 - 68percent Min 260 Euro/MT
0207 13 - 68 percent from Min 290 Euro/MT to Min 456 Euro/MT
0207 14 - 74 percent from Min 210 Euro/MT to 500 Euro/MT

Turkey:
0207 24, 0207 25 - 25 percent Min 100 Euro/MT
0207 26 - 25 percent from Min 100 Euro/MT to Min 130 Euro/MT
0207 27 - 25 percent from Min 100 Euro/MT to 130 Euro/MT

Other:
0207 32 - 25 percent Min 100 Euro/MT
0207 33 - 25 percent Min 100 Euro/MT
0207 34 - 25 percent
0207 35 - 25 percent from Min 100 Euro/MT to Min 130 Euro/MT
0207 36 - 25 percent from Min 100 Euro/MT to Min 130 Euro/MT

Eggs:
0407 00 11 0, 0407 00 19 0 Breeding eggs - 5 percent
0407 00 30 1 (between November 1 and April 30) - 20 percent Min. 120 Euro/MT
0407 00 30 2 (between May 1 and October 31) - 50 percent min 300 Euro/MT

0408 Powdered eggs
0408 11 20, 0408 11 80 - 25 percent Min. 675 Euro/MT

0408 19 - 25 percent Min 295 Euro/MT
0408 91 - 25 percent Min 650 Euro/MT
0408 99 - 25 percent Min 170 Euro/MT

TRQ:

There are reduced import duty quotas for 2002 as follows:

0207 12 10 0, 0207 90 0 - Whole chickens/hens, frozen - 200 MT at 55 percent or Min 650 USD/MT;
0207 14 10 0 - 0207 14 99 0 - Parts of chicken and hens, frozen - 1,300 MT at 55 percent or min 650 USD/MT

There is a 1,000 MT duty free import quota for poultry products granted to EU countries only for the period July 1 - June 30.

There are lower import duties for imports from CEFTA countries (Hungary, Romania, Czech Republic, Slovakia, Poland, Romania) at 28 percent for most chicken products and 10 percent for some turkey and other poultry products. For some countries, these duties are valid only within certain quotas as follows:

Poland - 0207 24 to 27 - 200 MT at 50 percent reduction in the basic import duty.
Czech Republic and Slovakia:
020711 - 25 percent - unlimited quota
020713 - 25 percent - unlimited quota
0207 24 - 18 percent - unlimited quota
0207 25 - 18 percent - 100 MT
020726 - unlimited quota
020727-18 percent -100 MT
020732 - 18 percent - unlimited quota
0207 33 to 36 - 9 percent - 100 MT

0407 - 0 percent - unlimited quota,
0408 - 12.5 percent - unlimited quota.

Hungary - 0207 13, 0207 24 to 35 - 15 percent for 500 MT.

According to the free trade zone agreement with Turkey, there is a quota of 100 MT for 020724 and 020725 at 12.5 percent Min. 50Euro/MT.

Eggs:

Duties for imports from the EU: for the period January 1- June 30- 47.6 percent min

282.8 Euro/MT; for the period July 1 - December 31 - duty 20.4 percent min 121.2 Euro/MT

Duties for products imported from CEFTA countries:
- eggs from turkey, geese and other for hatching - no duty for unlimited imports from Czech Republic and Slovakia;
-eggs without shells and egg yolks, fresh, dried, frozen or canned - 12.5 percent for unlimited imports from Czech Republic and Slovakia.

Exports

Export quotas for the EU:
-6,050 MT of poultry meat and offal wit the exception of liver; at zero duty;
canned poultry meat - 1,000 MT at zero duty;
-dried whole eggs and whole eggs without shells - 20 percent duty for a quota of 750 MT;

Export Quotas for CEFTA:
-live poultry - 9 percent import duty; for cocks and hens above 2 kilos - 10 percent;
-poultry meat and offal, frozen, fresh and chilled, whole or in cuts - 28 percent;
-frozen liver from cocks and hens and liver from ducks, geese and other - 10 percent;

Export to Macedonia: quota of 500 MT poultry meat at zero duty;
Export to Turkey: fresh or chilled liver at 12.5 percent and 21 percent for a quota of 10 MT frozen ducks, geese in cuts, at 32.5 percent and 21 percent respectively for a quota of 10 MT.

Tariff and Non-Tariff Barriers

The veterinary requirements for poultry/egg imports are available from the AgOffice, Sofia on request. The veterinary rules are in line with European and WTO requirements. In 2002, the Bulgarian Vet Service developed, in cooperation with USDA/FSIS, a new bilingual export certificate for U.S. origin poultry meat and products (9060-5) which is valid until Bulgaria becomes a full member of the EU (not earlier than 2007).

AgSofia has also attempted alleviate the use of reference prices by customs officials to determine customs values. Poultry importers have frequently complained of this practice. Since the reference prices are invariably higher than the declared values on product invoices, the effect is to raise customs charges. This practice is inconsistent with Bulgaria's commitments to the WTO, which (generally) prohibit the use of reference prices.

Discussions with the Ministry of Finance, while raising the awareness of the practice, were not conclusive. Complaints about the use of reference prices have, however, declined recently.

AgSofia has also engaged the Government of Bulgaria on its general tariff and tariff rate quota schedule (TRQ), which are in need of reform. High minimum tariffs (as high as 500 euros) sometimes result in charges higher than the WTO bound rate, particularly on low-priced leg quarter cargos. The TRQ schedule for poultry is particularly difficult, since it has a minimum charge of $650.

POLICY

Production Policy

In 2000-2002, the GOB had funds for soft loans for the livestock sector including the poultry sub-sector. Soft loans were available for purchasing breeding stock, layers, and for purchasing equipment for livestock raising. The loan terms are preferential with up to three year grace period. There were also subsidies per head of breeding stock purchased.

A larger source of financing is the EU-SAPARD program which provides a 50 percent subsidy of the total investment. However, the requirements for eligibility and participation are stringent, thus only a small portion of SAPARD funds were used to date in the poultry sector. Leading companies in the industry will have an advantage in this program and will further modernize or expend their facilities. Most of the medium/small sized companies are not likely access SAPARD funds.

Veterinary Policy

Over the last several years, Bulgaria adopted new veterinary regulations harmonized with EU legislation in the poultry industry. Such local regulations include Ordinance #8 of March 12, 2001 for quality, classification, storage and supply of poultry meat and poultry sub-products; Ordinance #31 of July 6, 2001 for quality/safety requirements for commercial eggs for human consumption; various ordinances adopted in 1996-2001 for hygiene at poultry farms, slaughtering houses; veterinary and hygiene requirements for sales of fresh poultry meat and a number of regulations related to food safety issues (the latest is the ordinance for minimum residue levels) and the introduction of good manufacturing practices and HACCP certification.

Trade Policy

Imports

Over the last 10 years, the poultry industry enjoyed the highest level of trade protection compared to any other agricultural sector. The duty on chicken meat has always been prohibitively high. Import duties on other poultry products such as turkey, which are not locally produced, are also considered high given zero domestic production. The tariff rate quotas are small and import duties within these quotas are even higher than the general duties. This particular structure of trade regime pushes chicken imports in the "grey" business and is one reason for illegal trade, corruption and unfair competition in the poultry industry. As a result, the state budget is estimated to lose significant revenue from "grey" imports. This situation negatively affected not only consumers but also legitimate local poultry producers/traders who are facing unfair competition.

In addition, the customs authorities has a practice to use "reference" prices or factious prices for calculating the duties and VAT instead of invoice prices supported by other import payment documents. This practice started in 1997 and is not consistent with Bulgaria's commitments in the WTO. (see non-tariff trade restrictions section).

The 2002 import quota for 1,000 MT of chicken meat of EU origin (effective July 1) was open for only one day due to the high demand. Importers' requests for quota distribution were submitted for a total a 1,336 MT. Therefore, all applicants faced a reduction to 75 percent of their whole request so that the total tonnage could not exceed the quota limit.

Imports of such quantity immediately negatively affected local producers who complained about higher than normal stocks and dumping prices. Most producers started to sell below production costs in order to compete with these duty free imports. As a result of this situation, the MinAg is considering revising future distribution of this annual quota by tranches during the year which will have less effect on the domestic market.

In terms of trade protection, the APP continued to request from the government trade protection. They insist on the highest possible import duty in the entire Bulgarian Tariff Code, 74 percent (HS#020714 frozen leg quarters), and the introduction of a high specific duty, up to 500 Euro/MT. The APP is also suggesting increasing the egg import duty to 50 percent throughout the year compared to the current 25 percent in the winter months and 50 percent in the summer months.

Another APP proposal for changes in the trade regime in 2003 is related to the Bulgaria-EU trade agreement on the "double profit" accord. According to the EU proposal, Bulgaria was to accept 6,000 MT of duty free imports of EU origin poultry products. The strong negative reaction of the APP forced a reduction of this quota to not more than 3,000 MT during early talks. These negotiations are still on hold and are expected to be renewed in 2003 of finalizing details by July 2003.

Exports

Most recently, the APP lobbied the GOB to include poultry meat and eggs in the list of products eligible for state export subsidies. The APP proposal is for a subsidy of $0.02/egg and $0.20/kilo of poultry meat. However, the MinAg does not have resources to fund such demands. In addition, poultry meat has not been identified as a priority export product for the GOB.

MARKETING

In 2002 and in 2003, the local poultry industry plans to direct its efforts to the following goals in marketing:

- improved distribution;
- better assortment and variety of products;
- introduction and maintenance of brand names;
- increased sales in the food service sector;
- improved packaging;

The APP has a very active PR policy vis-a-vis local consumers to limit consumption of any imported poultry products. The APP is misinforming local consumers about the "bad" quality of imported products, especially for chicken leg quarters imported from the United States. At a recent press conference, the APP stated that all imported poultry products are found in various cuts. Therefore, local consumers should buy only locally produced whole birds which have "much higher quality". Imports are viewed by APP the major reason for all production problems in the domestic poultry industry.

U.S. Trade Opportunities

There are good opportunities for the U.S. to supply poultry products due to competitive U.S. prices, and increased demand. Currently, the advantages of U.S. chicken include price competitiveness and consistent quality. Especially promising is the growing turkey market. The demand for retail sales of whole turkeys is the highest around Christmas. Turkey products for processing are in demand by the local industry are preferred over chicken meat. The demand both for turkey and chicken MDM is high with the preference towards turkey MDM.

Table# 1. Number of poultry as of January 1, 2000, 2001 and 2002 in 1,000 head

Poultry inventories as of January 1, 2000, 2001 and 2002 in 1,000 head			
	2000	2001	2002F
Poultry	14,963	14,991	15,040
Layers only	8,304	7,883	8,509
Note: According to unofficial MinAg data, the number of poultry in 2002 was 18.0 million of which 8.0 million layers. The MinAg forecast for 2003 is for 18.5 million total poultry including 8.2 million layers.			

Table#2. Production of poultry meat and eggs in 2000, 2001, and 2002F (million eggs and thousand metric tons)

Production of Poultry Meat and Eggs in 2000, 2001, and 2002F (million eggs and thousand metric tons)			
	2000	2001	2002
Meat	106,000	108,000	110,000
Eggs	1,490	1,574	1,600

Table# 3. Production costs of chicken/broiler meat and eggs in USD/kilo of live weight and per an egg in the period 1997-2001

Production costs of chicken/broiler meat and eggs in USD/kilo of live weight and per an egg in the period 1997-2001					
	1997	1998	1999	2000	2001
Chicken meat	1.01	0.78	0.69	0.70	0.65
Eggs	0.056	0.053	0.048	0.040	0.036

Table# 4. Farm gate, wholesale, and retail prices of poultry products by quarters in 2000 and 2001

Farm gate prices of broilers by quarters in leva per a kilo in live weight											
	2000					2001					
	I	II	III	IV	Av.	I	II	III	IV	Av.	2001/ 2000 in percent
Broilers	1.42	1.45	1.46	1.61	1.49	1.67	1.62	1.62	1.63	1.64	110
Wholesale prices of poultry meat and eggs by quarters in leva per kilo and in leva per an egg											
Chicken meat	2.68	2.52	2.88	3.31	2.85	3.22	3.13	3.24	3.34	3.23	113
Eggs	0.14	0.10	0.14	0.16	0.14	0.15	0.13	0.13	0.14	0.14	100
Retail prices of poultry meat and eggs by quarters in leva per kilo and in leva per an egg											
Chicken meat	3.06	2.92	3.28	3.72	3.25	3.64	3.61	3.67	3.78	3.68	113
Eggs	0.15	0.12	0.15	0.18	0.15	0.18	0.15	0.15	0.16	0.16	107
Note: 2001 exchange rate is $1.0=2.0 Bleva; 2000 exchange rate is $1.0=1.78 Bleva											

Table# 5. Total poultry meat imports in 2000 and 2001

Total Poultry Imports in 2000 in MT		Total Poultry Imports in 2001 in MT	
USA	5,467	France	5,452
Belgium	4,298	Belgium	3,743
France	3,456	USA	3,639
Holland	2,564	Holland	2,811
Germany	972	Brazil	1,591
United Kingdom	774	Greece	1,132
Hungary	727	Hungary	1,122
Denmark	629	Spain	874
Total	20,989/$8.2 million	Total	24,081/$9.3 million

Table #6. Total poultry imports in the first six months of 2002, MT

Total Poultry Imports in the first six months of 2002, MT	
USA	4,586
Belgium	2,486
France	1,911
Holland	1,844
Brazil	1,629
Hungary	1,154
Italy	700
Total imports	17,417/$7.0 million
Total exports	2,138/12.0 million

Table # 7. Imports of waste from the poultry industry (HS#0504 and HS#0505) in

2001, in MT

Imports of waste from the poultry industry (HS#0504) in 2001, in MT		Imports of waste from the poultry industry (HS#0505) in 2001, in MT	
USA	3,765	USA	100
Greece	815	Greece	105
Germany	370	Spain	80
Argentina	207	Holland	63
Others	828	Belgium	40
Total	5,985/$1.9 million	Total	448/$0.5 million
Total exports	169	Total exports	261

Table # 8. Imports of waste from the poultry industry (HS#0504 and HS#0505) in the first six months in 2002, in MT

Total imports of waste from the poultry industry (HS#0504 and HS#0505) in the first six months in 2002, in MT	
USA	881
Greece	340
Brazil	253
Germany	243
Canada	96
Total	2,026

Table# 9. Imports of poultry and poultry products in 1999 - 2001

Imports of poultry and poultry Products in 1999 - 2001			
	1999	**2000**	**2001**
Live Poultry, numbers	1,836,417	2,855,555	2,106,284
hens and cocks	573,250	732,712	616,738
- for breeding	573,250	527,672	560,738
Hungary	198,663	229,150	176,892
Denmark	14,272	-	75,590
France	72,056	31,802	57,896
Germany	50,102	110,928	152,240
Holland	215,248	144,462	31,120
Greece	-	-	67,000
Duck, geese etc. for breeding	5,585	36,020	1,488,960
France	1,985	31,420	1,488,966
United Kingdom	3,600	4,600	6
Other	1,257,582	2,084,483	-
Turkey for breeding	-	2,340	580
United Kingdom	-	2,340	580
Poultry meat, total, MT	21,292	20,989	24,081*
Fresh and chilled	494	320	627
Greece	35	6	2
USA	382	-	302
Spain	2	267	260
Other	77	47	63
Frozen	10,951	18,695	13,330
Greece	130	532	577
Holland	3,404	2,474	2,151

USA	2,035	4,520	1,902
Germany	-	972	313
Belgium	1,170	4,129	2,456
France	781	3,456	3,876
Hungary	-	689	166
Italy	1,559	55	-
Other	1,872	1,868	1,898
Liver and offal	1,125	1,938	1,958
USA	626	947	196
Holland	178	70	-
Canada	154	82	45
Belgium	118	142	43
Brazil	-	411	1,180
Other	49	286	494
Cured and salted	8,722	-	-
USA	6,000	-	-
Poultry fat	-	-	53
Guts, stomachs and other waste	3,175	10,783	6,433*
USA	2,204	7,157	3,865*
Brazil	-	-	203*
Argentina	76	-	207*
Canada	93	-	72*
Germany	401	571	370*
Greece	36	646	920*
Other	365	2,409	-
Eggs with shells, number	12,132,556	3,945,355	5,660,700*
Eggs for hatching	3,048,576	3,241,555	1,398,480
Greece	-	-	360,000

France	934,400	1,882,160	410,000
Canada	-	-	11,000
Holland	1,604,896	43,560	219,240
Czech Republic	60,000	300,000	-
Austria	283,680	-	-
Israel	-	14,880	39,200
Macedonia	-	-	108,000
Yugoslavia	158,400	452,240	237,240
Other	7,200	-	13,800
Eggs for consumption	9,083,980	703,800	2,881,000
Turkey	1,074,960	315,000	359,000
Holland	682,000	324,000	-
Israel	1,590,480	-	-
Ukraine	5,543,640	-	-
Greece	192,600	-	1,388,100
Macedonia	-	64,800	1,134,000
Other	-	300	-
Eggs without shells and dried yolks, MT	217	377	429*
Austria	47	104	101
Belgium	70	40	-
Denmark	40	40	26
Czech Republic	28	32	-
Romania	12	5	-
Brazil	-	-	36
Argentina	-	-	20
Holland	-	-	63
Other	20	156	32

Note: Data for 2001 is for the first nine months unless noted with * which means complete annual 2001 data.

Table# 10. Exports of poultry and poultry Products in 1999-2001

Exports of poultry and poultry products in 1999-2001			
	1999	**2000**	**2001**
Live Poultry, numbers	136,297	346,461	188,184
for breeding and selection	136,297	346,461	188,184
Yugoslavia	51,770	33,025	18,338
Macedonia	84,527	246,836	169,847
Moldova	-	66,600	-
Poultry meat, MT	3,988	4,988	3,801
Fresh and chilled	817	984	858
Georgia	68	-	-
Yugoslavia	16	-	3
France	551	702	472
Belgium	160	164	45
Macedonia	-	-	246
Other	22	118	92
Frozen	2,353	2,820	2,060
Belgium	761	1,072	556
Georgia	642	287	48
Azerbaijan	61	23	24
Yugoslavia	37	91	86
Macedonia	54	96	196
France	658	1,009	1,078
Other	140	242	74
Liver and offal	818	1,132	883
France	522	873	756
Belgium	53	120	80
Macedonia	8	-	-

Other	235	139	47
Guts, stomachs and other waste			99
Macedonia	23	10	5
Turkey	72	124	94
Other	9	12	-
Eggs with shells, number	38,120,683	19,755,240	24,646,494*
Eggs for hatching	9,828,285	9,942,299	11,376,090
Hungary	2,265,480	2,970,000	3,387,240
Yugoslavia	775,160	36,000	741,600
Russia	3,841,280	-	-
Ukraine	1,601,500	2,485,440	4,649,220
Iraq	-	4,370,760	249,984
Other	1,344,865	80,099	2,348,046
Eggs for consumption	28,292,398	9,813,040	2,667,106
Macedonia	272,160	-	773,280
Albania	10,752,090	270,000	-
Russia	12,750	-	14,250
Yugoslavia	7,311,241	9,543,040	1,443,760
Other	9,944,157	-	435,816
Eggs without shells and dried yolks, MT	221	117	119
Norway	60	-	-
Turkey	-	-	20
Holland	60	40	-
Georgia	3	-	-
Denmark	80	20	-
Other	18	56	5

Note: Data for 2001 is for the first nine months unless noted with * which means complete annual 2001 data.