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Bulgaria

Food and Agricultural Import Regulations and Standards

Trade Regime in 2003

2003

Approved by:

Holly Higgins

U.S. Embassy, Sofia

Prepared by:

Mila Boshnakova

Report Highlights:

Bulgaria's trade regime reflects the country's status as an applicant to the EU. A variety of special preferential trade agreements with the EU were either expanded or initiated, including both the "double zero" and "double profit" arrangements. Despite these arrangements and other preferential tariff agreements, there are still excellent opportunities for U.S. exports to Bulgaria, particularly for red meats, poultry, and seafood.

Includes PSD changes: No
Includes Trade Matrix: No
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New Tariff Code for 2003

On December 9, 2002 the Council of Ministers approved Decree No. 289 which is the revised Tariff Code for CY2003 (published in the Official Gazette #117 of December 17, 2002). This decree was introduced and incorporated into Bulgarian Customs Tariff which aims to harmonize the Bulgarian Tariff Code with the EU Combined Nomenclature.

The newly changed Tariff Code updates the Combined Nomenclature of 2002 and introduces separate rates for "conventional duties" and "autonomous duties" replacing existing "general duties". The conventional duties are related to the WTO bound rates and are calculated for the respective year depending on Bulgaria's WTO commitments. They are applied to all WTO members. "Autonomous duties" including suspended duties if such are adopted, are those actually applied when they are lower than the "conventional duties". So far, Bulgaria has not published WTO bound rates and currently they are under conventional duties. This structure of the tariff code allows for more transparency and shows to what extent the country applies lower-than-WTO bound rates. Various reductions in duties approved by the GOB in selected time periods are shown under the "autonomous duties" column. For each tariff position, a special note indicates if the respective product enjoys preferential treatment given found in an attachment to the Tariff Code (see the list of attachments or trade preferences/agreements at the end of the report).

For the first time, new regulations call for the principle of an "applied duty" to be the lower of the two duties, no matter if this is the conventional one or the autonomous one. This is an important principle since it concerns all non-preferential parties such as the United States.

Special attention is given to those tariff positions where duties (autonomous) are not only lower than the WTO rates but also lower than the EU duties for third countries. Thus when Bulgaria becomes a full member of the EU (by 2007 or later), these duties should be increased. In this case, the respective countries which will suffer from "lost access" opportunities, may require compensation under WTO rules. The GOB also took into consideration the fact that these products are often raw materials, so local industries can suffer significantly upon future increase in duties. For this reason, a gradual increase in duties for 290 tariff numbers was adopted at closer to the EU level. Since imports under those tariff positions are entirely from "preferential" partners, this change is not expected to make imports more expensive. On the other hand, there are 125 tariff positions whose duties are preserved despite being lower than in the EU. There are considerable imports from non-preferential partners, mainly of raw materials and equipment.

The Combined Nomenclature (2003 Customs Tariff) contains 10,606 tariff numbers of which 2,441 are for agricultural products.

-- The average import tariff for "the most favored nation" is 11.31 percent; for industrial products it is 8.62 percent and for agricultural products it is 21.97 percent. These three indexes are higher than in 2002 when they were respectively 11.13 percent; 8.57 percent; and 21.33 percent. This is because, unlike 2002, the 2003 calculation does not take into consideration suspended duties;

-- The average tariff for industrial products in trade with the EU, EFTA, CEFTA and Turkey is zero; and with Macedonia - one percent;

-- The average import tariff (without preferences/suspended duties) for 2003 is 7.73 percent (up from 6.52 percent in 2002 and 7.04 percent in 2001). If suspended duties are taken into consideration, the average tariff will be 7.62 percent;

-- The average import tariff for industrial goods is 6.52 percent (up from 5.18 percent in 2002 and 6.13 percent for 2001). If suspended duties are taken into consideration, the average tariff will be 6.45 percent;

-- The average import tariff (ad valorem) for agricultural goods is 21.93 percent (down from 23.20 percent in 2002 and 18.82 in 2001). If suspended duties are taken into consideration, the average tariff will be 21.48 percent;

For negotiating reasons, starting from 2003, all temporary suspended autonomous duties, are attached separately (Attachment #5 to Article 15/al.1 to Ordinance #285/December 9, 2002/ 2003 Tariff Code). These are various temporary quotas, reduced import duty or duty free quotas adopted based on market conditions, and after negotiations between the GOB and the respective domestic industry associations (see Table#1).

These changes target establishment of a local Tariff Code which will become increasingly similar to the EU Tariff Code. Thus, in 3 to 4 years, Bulgaria will be ready to fully adopt the EU Code. Duties will not be lowered before the new WTO round is finalized and will remain at current levels until Bulgaria will become of full EU member.

Trade Regimes

INDUSTRIAL IMPORTS: Temporary suspended autonomous duties are preserved as well as existing duties for high volume imports from non-preferential partners. There are several products such as mineral and chemical fertilizers, additives for grease, etc., whose imports are levied zero duty and are in high volume. At the same time, the EU duties are higher as well as the WTO bound rates. For example, fertilizers are imported from Russia and the Ukraine at zero duty but in the EU the duty is 6.5 percent and the WTO bound rate is 15 percent.

Therefore, the Ministry of Finance suggests further changes in duties for this type of product in the future.

AGRICULTURAL IMPORTS: The major changes in this area are caused by non-market forces in a GOB effort to protect inefficient local industries. Other changes target prevention of smuggling although they are not considered effective (Table#3).

Trade Regime for Agricultural Products

- The duty for frozen chicken leg quarters (reportedly, the EU standard) is equalized with the duty for frozen chicken quarters (reportedly, the U.S. standard) at 74 percent or minimum payment of 500 Euro/MT. According to Customs "this product when frozen is difficult to be distinguished". In reality, the fact that these two tariff positions existed for the same product (chicken leg quarters) and had a difference of 50 Euro/MT in the specific duty in 2002, caused corruption and confusion among customs officers and importers.

In late 2002, the Association of Meat Processors (AMP) held active negotiations with the GOB and requested an introduction of a duty free import quota of 12,000 MT for frozen boneless turkey meat, the most in demand by the meat processing industry, under HS#0207 27 10 0 for 2003. The AMP's arguments were that Bulgaria does not have any commercial turkey production and turkey meat imports will not affect any local producers. Additional arguments were made regarding the high quality as well as high demand for this meat as a substitute for beef. Trade preferences for turkey imports do not exist under WTO quotas/duties. Those available for the EU and CEFTA are small and do not target the world turkey meat suppliers. Turkey meat imports in 2001 were 14,400 MT (AMP data) or 46 percent of total poultry imports; and for the first 5 months of 2002, turkey imports were 7,200 MT or 70 percent of total poultry imports. The largest suppliers are the United States and France. These trends, according to AMP, clearly show the increasing demand for this type of meat.

However, the GOB disagreed with AMP members and refused to provide any preferences for turkey imports. This decision was motivated by Customs' fear that border customs officers "could not differentiate between frozen turkey and frozen chicken" which may cause more smuggling of chicken. Bulgarian Association of Poultry Producers also was pushing the GOB to oppose trade preferences in poultry meat trade although turkey is not produced locally.

- One major change which will affect U.S. exports and the local meat industry is the frozen pork import quota at a reduced duty. Despite the AMP's appeal, the GOB decision was to protect the local pork industry. The result was a twice reduced quota of 3,000 MT (7,000 MT in 2002) at twice higher duty, 250 Euro/MT vs. 100 Euro/MT in 2002 (see details in the pork trade section). A similar decision was taken for pork fat imports which in 2003 are limited to 9,000 MT vs. no quantitative limits in 2002. These quotas are in addition to the EU "double zero" quotas. The EU pork quota is valid from June 30, 2002 to July 31, 2003; but is used usually for only four-

six months, and does not overlap with the general pork import quota which is valid in the first six months of 2003.

The AMP requested the following trade preferences:

- Frozen pork, HS#0203 29 55 0, a quota of 9,000 MT for the first half of the year. This proposal was accepted by GOB with major reduction to one third of the requested quota.
- Pork fat, HS#0209, duty free imports. This request is based on the fact that the regular basic duty is 40 percent. Pork fat is in high demand by the meat industry. Pork fat imports in 2000 were 4,440 MT; in 2001-9,050 MT and in 2002 (first 7 months)-6,430 MT. No preferences for such imports are available under EU/CEFTA. This proposal was accepted by the GOB and is currently in effect.
- Pork offal, HS#0206 41 20 9 (liver) and 0206 49 20 9 (other) duty free import quota without quantitative limitations. These imports in 2000 were 13,000 MT; 12,300 MT in 2001 and 3,600 MT in 2002 (first 7 months). The basic duty is 20 percent and imports are coming mainly from the U.S. and Canada which do not use any trade preferences. These imports do not compete with local producers who market fresh edible offal for direct consumption. Frozen imported offal is used entirely for processing. This proposal was partly accepted by the GOB which reduced duty for imports of pork liver.
- The duties of rapeseed oil (crude and refined) are increased in line with the EU duties to limit imports. This change was done at the request of local sunflower crushers who were protesting against "cheap substitutes" which are used instead of sunflower oil and marketed locally as "sunflower oil". The inability of local authorities to control the problem forced this non-market decision. It shows how domestic industries' problems are "solved" by blaming imports for inefficiencies or trying to eliminate imports. This decision is also a result of the abundant sunflower crop in MY2002/03 vs preferential imports of sunflower seeds/oil provided to local crushing industry in 2002 due to the poor crop in MY01/02 (ref:BU#2001).
- Duties for soybean, palm and cocoa oil are increased from the zero duty in 2002 to 2.5-3.5 percent in 2003 (see Table#1). The conventional (WTO) rates are between 10 and 40 percent. The Ministry of Finance wants these duties to be increased to the EU level or to WTO allowed rates. However, the duties will stay at the new level (2.5-3.5 percent) in 2003. The same situation exists with cocoa oil/butter and bananas.
- Due to a local shortage of dry beans and lentils, imports in 2003 are free of charge (January 1- July 31) as in 2002. These products are part of the everyday diet of the local population.

- There is a duty free import quota of 2,500 MT for apple puree which is used for pectin production. Local production is facing a shortage.
- Imports of grains and corn for pharmaceutical and industrial purposes continued to enjoy preferences (duty free) as in 2002. Preferential corn imports for industrial processing are done based on request of the largest corn starch processor in the country (a foreign investor) which usually imports corn from Hungary, and requires its corn to be "GMO" free.

In addition to temporary import quotas, Bulgaria has import quotas based on the GATT agreement from 1994. These quotas were the same for the last 5 years and are not changed for 2003 (Table #2)

New Customs Regulations

Starting from 2003, there will be two major changes in the customs regulations:

- When Customs authorities find a violation of the law, a special out-of-court settlement is possible between the violator and Customs. The conditions for this agreement are the same as in the usual legal process. However, the violator will be able to save time without go through the slow legal process and thus, can take the product/shipment as soon as he pays and signs the violation agreement. If the violator does not agree with this option, he will undergo the usual legal procedures in the Bulgarian court.
- To date, only Customs officers themselves were obliged to declare their property. With the new changes, the entire families (spouse and children) will be forced to do so annually. This a change which is viewed as a way to reduce corruption.

Customs Policy

Bulgarian Customs officials continue to apply minimum import prices when levying import duties and VAT, covering all major imported agricultural products, including poultry and meat. This policy is inconsistent with WTO commitments and in conflict with Bulgarian Customs legislation, but it benefits local producers (especially the Association of Poultry Producers, APP). The Customs offices states this brings higher GOB revenue, but in practice, the high tariff encourages illegal trade and smuggling. In particular, the high import tariffs favor inefficient domestic chicken and pork meat industries, which are not otherwise subsidized.

Bilateral Agreements

The GOB expects revenue collected from imports in 2003 to be similar to levels in 2002 and that new changes will not affect the overall state budget. In addition to existing bilateral trade

agreements (Turkey, Macedonia, Croatia) new agreements were signed in 2002 with Israel, Lithuania and Estonia, effective as of 2003. Further liberalization is expected with in the future with Israel, Macedonia and new trade agreements with Yugoslavia and Albania (by April 2003).

Agreements with the EU and EFTA countries

- Bulgaria has duty free import quotas for EU-origin products under their "double zero" accession agreement. In CY2003, duty free quotas are on average 10 percent larger than in 2002 (Table#4). The EU countries enjoy reduced import duty quotas for beef, dairy products, processed fruits and vegetables, some grains, beverages, wine and tobacco. The size of these quotas ranges from 100 MT (butter, some fresh vegetables, barley, some meat processed products, etc.) to 6,000 MT (tobacco) and 8,000 MT (beef) with duties from 8.5 percent to 40 percent. A detailed list of these quotas is available from FAS Sofia by request.
- In late 2002, Bulgaria finalized the new round of EU trade liberalization talks on the so called "double profit" accession agreement for non-processed ag products. This agreement will be effective January 1, 2003 (see Table#5). Preferences for imports from the EU include quotas of 100 MT to the highest levels of 55,000 MT (wheat and wheat gluten). Bulgaria is also granted export quotas at similar levels, the highest being wheat at 250,000 MT and corn at 80,000 MT. The GOB considers these two export quotas very successful for Bulgaria. The list of Bulgarian quotas/duties for exports to the EU is available from FAS Sofia by request.

Most quotas are negotiated to include annual increases of 10 percent above the preceding year quota. Newly agreed quotas include those for exports of Bulgarian yogurt to the EU as well as grain quotas. For some quotas (grapes, mushrooms), negotiations resulted in a reduction of duties and an increase in quotas. For other products, the quotas are preserved but the duties are reduced/suspended. Several EU-origin products will have limited access in the form of duty free quotas such as peppers, blueberries, raspberries, blackberries and eggs.

- Under agreements with the EU and EFTA countries, Bulgaria has a zero or reduced duty on certain imports without quantitative limitations, unlike the quotas discussed above. It means that the ad valorem duties will be suspended. However, the specific duties will remain valid for these products where they are applicable. The list of relevant products contains 100 tariff positions and includes butter, fresh flowers, onions, fresh and processed vegetables, citrus fruits, peanuts, some vegetable oils, processed meat products, cocoa products, bakery products, tea, coffee, oil meals and flours. A detailed list is available from FAS Sofia by request.
- Despite the Bulgarians' request for elimination of entry prices for fresh fruits and vegetables for their exports to the EU, this system will stay in place in 2003.

However, the EU grants additional 5 lower entry price levels for Bulgarian tomatoes, cucumbers, squash, apricots, and cherries; and additional 3 lower entry price levels for grapes and plums. For apples, pears, peaches and nectarines, depending on the season, some reduction in the level of entry prices will be applied. This information is available from FAS Sofia by request.

- In September, 2002, Bulgaria finalized negotiations with the EU on trade in processed ag products (Decision of the Association Council EU-Bulgaria #2/2002 for improvement or trade agreements in processed ag products determined in Protocol #2 to the European Association Agreement, Official Gazette #87 of September 13, 2002) which has been enforced since September 1, 2002. Quotas which are approved for 2002 were reduced "pro rata" due to later enforcement of the agreement. The EU was granted quotas for vegetable oils, confectionary, cocoa, processed potatoes, mineral water (see Table#7) as some of them have regular annual increases. This regulation also determined a number of import duties for EU-origin products imported to Bulgaria such as dairy products, vegetables, vegetable oils, animal fats, sugar, chocolate, pasta, processed fruits and vegetables, ice cream, mineral water, beer, liquors, tobacco products etc. (see Table# 6). The same regulation determined the respective export quotas for Bulgaria to the EU and the duties applied by the EU for Bulgarian exports. This information is available from FAS Sofia by request.
- A special EU agreement for imports of alcohol beverages was signed in 2001 and continues to apply in 2003. According to this agreement, lower duties are applied on EU spirit imports (see Table#8)
- The list of preferential import duties for EFTA countries is limited to about 30 tariff positions with duties ranging from 5 to 29 percent (see Table#9). All seafood products are imported duty free (HS#0301, 0302, 0303, 0304, 0305, 0306,0307,1604,1605) as well as some oil meals (HS#2301,2309).

Poultry Imports

Basic Import Duties - Poultry

Import Duties for Chicken and Turkey products in CY2003 in Bulgaria		
HS#	Product	Duty
HS#0207	Meat and offal from poultry, fresh, chilled or frozen	
Chicken		
HS#020711	whole, fresh and chilled	68% min 260 Euro/MT
HS#020712	whole, frozen	68% min 260 Euro/MT
HS#020713	cuts and offal, fresh or chilled	
	cuts	68% min 290 - 456 Euro/MT
	offal/liver	25%
HS#020714		
	cuts	74% min 210-500 Euro/MT
HS# 02071460 0	Leg quarters and cuts from them	74% min 500 Euro/MT
	offal/liver	25%
Turkey		
HS#020724	whole, fresh or chilled	25% min 100 Euro/MT
HS#020725	whole, frozen	25% min 100 Euro/MT
HS#020726	cuts and offal, fresh and chilled	
	cuts	25% min 100 -130 Euro/MT
	offal/liver	25%
HS#020727		
	cuts	25% min 100-130 Euro/MT
	offal/liver	25%

Tariff Rate Quotas - Poultry

(Regardless the origin)

HS#0207 12 10, 0207 12 90	Chicken meat, whole, frozen - 200 MT at 55% or minimum 650 US\$/MT
HS#0207 14	1,300 MT at 55% or minimum 650 US\$/MT.

Trade Agreements - Poultry

European Union: Certain poultry meat products (no chicken, one turkey product, and other miscellaneous poultry products) are granted duty free entry as follows: HS#0207 27 91 0; 0207 34 100; 0207 34 900; 0207 35910; 02 07 36 810; 0207 36 850; 0207 36 890. In addition, the EU has duty free import quotas under "double zero" agreements, 1,000 MT for 2003 (see Table#4)

CEFTA: The following are the maximum import duties applied upon imports of commodities originating from CEFTA countries:

HS#0207 12 -	28%;
HS#0207 14 10/99 -	28%;
HS#0207 27 91 -	10%;
HS#0207 36 81/89 -	10%

Czech and Slovak Republics: Import duties applied upon imports from Czech and Slovak Republics to Bulgaria:

HS#0207 11 -	25% for unlimited quantity
HS#0207 13 -	25% for unlimited quantity
HS#0207 24 -	18% for unlimited quantity
HS#0207 25 -	18% within quotas of 100 MT for Czech Republic and 100 MT for Slovak Republic
HS#0207 26 -	18% for unlimited quantity
HS#0207 27 -	18% within quotas of 100 MT for Czech Republic and 100 MT for Slovak Republic
HS#0207 33 - 34-35 -36 -	9% within a quota of 100 MT for Czech Republic;
HS#0207 33 -	9% within a quota of 100 MT for Slovakia
HS#0207 34 - 35 -36 -	9% for unlimited quantity for Slovakia

Hungary: Import duties applied to imports from Hungary to Bulgaria:

HS#0207 13 -	15%
HS#0207 24-25-26-27-32-33-35 -	15%

This import duty is within a total quota for above HS numbers of 500 MT.

Poland: Import duties applied upon imports from Poland to Bulgaria:

HS#0207 24; 0207 25, 0207 26, 0207 27 - 200 MT quota at 50% reduction of the basic duty.

There are no preferences in import duties or quotas for Romania and Slovenia to Bulgaria.

Turkey: Import duties applied on imports to Bulgaria:

HS#0207 24 and 0207 25 - 100 MT total as HS#0207 24 is imported at 12.5% or minimum 50 Euro/MT and HS#0207 25 are imported at 12.5%.

Croatia: Import duties applied upon imports from Croatia to Bulgaria:

HS#0207 12 -	28%
HS#0207 14 10 - 99-	28%
HS#0207 27 91 -	10%
HS#0207 36 81 -	10%
HS#0207 36 85 -	10%
HS#0207 36 89 -	10%

Lithuania: HS#0207 unlimited quantities at 10% reduction in the basic duty.

Macedonia, Israel and Estonia: No preferences in quotas or import duties are applied for poultry.

Pork Imports

Basic Import Duties - Pork

HS#	Product	Import Duty
HS#0203	meat from swine, fresh, chilled or frozen	
	fresh and chilled	
HS#020311	whole or half carcasses	25% min.664 Euro/MT
HS#020312	shoulders, picnics, boston butt and cuts from them, bone-in	25% or min. 664 Euro/MT
HS#020319	other (it includes boneless cuts, loin, belly, ham, trimmings)	25% or min. 664 Euro/MT
	frozen	
HS#020321	whole or half carcasses	40% or min. 622 Euro/MT
HS#020322	shoulders, picnics, bottom butt and cuts from them, bone -in	40% or min. 622 Euro/MT
HS#020329	other (it includes boneless cuts, loin, belly, ham, trimmings)	40% or min. 622 Euro/MT

Tariff Rate Quotas - Pork

There is a temporary import quota of 3,000 MT (HS#0203 29 55 0) with a reduced import duty for pork at 250 Euro/MT for the second quarter of 2003 (Table#1) available to all origins.

The same list of quotas introduced unlimited imports of frozen pork liver, HS#0206 41 20 9, at 10 percent import duty; and a duty free import quota of 9,000 MT of pork fat, HS#0209, for the whole 2003. The second quota is for cured/salted pork of 1,500 MT, HS# 0210 11, 0210 12, 0210 19, with 15 percent duty for the whole 2003 (Table#2).

Trade Agreements - Pork

European Union: For the second half of the year(July 1- December 31), there is a duty free import quota for 8,000 MT (see Table#4) only for EU origin product.

CEFTA: The maximum import duty of 25 percent for HS#0203 is applied on imports of commodities originating from CEFTA countries. There are no other specific preferences in imports of pork from CEFTA countries.

Turkey and Macedonia: no preferences for pork imports

Croatia: The maximum import duty for HS#0203 is 25 percent without any quantitative restriction.

Estonia: A duty free import quota of 300 MT for HS#0203 21-22-29 is applied.

Israel: no preferences for pork imports

Lithuania: There is a quota of 100 MT at 10 percent reduction in basic duty for HS#0203 21-22-29

Beef Imports**Basic Import Duties - Beef**

HS#	Product	Import Duty
HS#0201	meat from bovine animals, fresh or chilled	
	whole, in cuts, bone-in and boneless	5% plus 244 Euro/MT
HS#0202	meat from bovine animals	
	frozen	
HS#0202 10	whole or half carcasses	5% plus 244 Euro/MT
HS#0202 2030 0202 20 50	other bone-in cuts (fore and hind quarters)	5% plus 244 Euro/MT
HS#0202 2090	other	5% plus 102 Euro/MT
HS#0202 30	Boneless	
HS#0202 3010 0202 30 50	fore and hind quarters	5% plus 97 Euro/MT
HS#0202 3090	other	5% plus 97 Euro/MT

Tariff Rate Quotas - Beef

According to GATT agreement (Table#2), the following beef quotas are available for 2003:

HS#0202 -	High quality meat from bovine animals - 1,000 MT at 0%
HS#0201 30; 0202 30 10;	
0202 30 50; 0202 30 90	Other high quality boneless cuts, fresh, chilled or frozen - 500 MT at 10% duty
HS#0201 10; 0201 20 20;	
0201 20 30; 0201 20 50;	
0201 20 90; 0201 30	Fresh or chilled bone-in or boneless meat - 1,000 MT at 10%
HS#0202 10	Frozen bone-in whole and half carcasses - 2,000 MT at 10%
HS#0202 20 30; 0202 20 50	Bone-in frozen cuts - 10,200 MT at 85.% of which 8,149 MT is for the EU and 2,051 MT for non-EU
HS#0202 20 30; 0202 20 50	Bone-in frozen cuts - 1,000 MT at 0%
HS#0202 30	Boneless frozen cuts - 4,100 MT at 10%

Trade Agreements - Beef

European Union: The EU has the largest portion in beef import quotas for bone-in frozen cuts (see above). No other preferences are available for 2003.

CEFTA: The following are the maximum import duties applied upon imports of beef and beef products originating from CEFTA countries:

HS#0201 - 25%;

HS#0202 - 25%

There are no other specific preferences in imports of beef from CEFTA countries.

Turkey and Macedonia: no preferences on beef imports.

Croatia: The maximum import duty for HS#0201 and HS#0202 is 25 percent without any quantitative restriction.

Estonia: There is an import quota of 300 MT for HS#0202 with a 8.5 percent import duty.

Israel: no preferences on beef imports.

Lithuania: There is a quota of 300 MT at 30 percent reduction of the basic duty for HS#0202 10, HS#0202 20, HS#0202 30.

U.S. Agricultural Exports to Bulgaria in 2002

According to the latest U.S. Customs data, Bulgaria will register an increase in agricultural imports from the U.S. in 2002; the highest since 1997. Total U.S. ag exports (in value) to this market for the period January-October CY2002 were \$13.0 million which is 9 percent lower compared to the same period in CY2001. These figures, however, do not include Balkan transshipments which account for more than 30 percent of major product trade (meat and poultry).

The highest average increase (in value) of U.S. sales is recorded for seafood, 49 percent; tobacco, 136 percent; and tree nuts, an eight-fold increase. There is an increase for vegetable oil, \$1.2 million compared to \$23,000 in 2001; and for wheat flour, \$1.030 million in 2002 compared to zero imports in 2001. These two products were delivered as a part of USDA/American Red Cross donation program which ended in CY2002.

In terms of specific products, the single largest U.S. import item is poultry meat (\$2.2 million) followed by frozen red meats (mainly pork, \$1.4 million); "other" consumer-oriented products (\$1.3 million); seafood (\$1.0 million) and tobacco (\$1.1 million). These products are followed by tree nuts, slightly under \$1.0 million; snack foods, processed fruits and vegetables, and fresh fruits. In terms of tonnage, U.S. agricultural exports in 2002 were the highest since 1998 with total 25,000 MT compared to 14,000 MT for the same period in 2001.

According to Bulgarian Customs, U.S. agricultural exports for 2002 (January-October) totaled 17,000 MT or \$10 million as follows:

U.S. Ag Exports to Bulgaria, 2002 (January - October), selected products		
HS# Product	MT	USD
010690000 Live animals	6,000 head	3,000
0201 20 900, and 0201 30 000 Chilled beef	1.0	11,360
0202 20 500 and 0202 30 900 Frozen beef	26	26,500
0203 29 550 Pork	2,000	1,300,300
0206 41 209- 49209 - 49809 Offal	345	109,000
020712 100-12900-14100-14200-14600- 14910-14990; Chicken 0207 26600-6700-27100-27600-2770- 27910-27990 Turkey	6,000	2,335,400
0210 19 510 Salted pork	280	151,000
0303 11000-19000-21900-74300-75200- 78190 Seafood	1,915	782,000
0504 00 000 Guts and stomachs	1,700	445,000
0712 20 000-90110 Dried onion	6	35,600
0713 400000 Lentils	98	35,500
0802 22900-12900 Almonds	324	145,000
0806 20 920 Raisins	7	8,600
0910 91 900 Spices	11	28,700
1005 Corn	478	273,000
1006 Rice	520	97,000
1206 Sunflower seeds	121	468,000
1208 10 000-90001 Soy flour and cotton flour	62	40,000
1209 Vegetable seeds	0.7	37,000

1210 Hops	27	142,000
1507 10 900-90000 Soy oil	1,500	655,000
1513 Cocoa oil	18	26,000
1516 Hydrogenated oil	15	12,500
1602 32 110-21900-41900 Ready foods	400	155,000
1702 Sugar	38	38,000
1901 Malt extracts	32	24,000
1905 Biscuits	3	15,000
2005 Processed vegetables	26	14,500
2007 Jams	4	5,400
2009 Juices	36	60,000
2103 Sauces	4	11,400
2202 Mineral waters	3	4,800
2203 Wine	13	24,000
2208 Alcohol	124	836,000
2309 Pet food	53	43,000
2401 Tobacco	198	888,000
2402 Cigars	6	89,000
2403 Other tobacco substitutes	313	675,000
Total	16,724	10,096,233

U.S. Agricultural Export Opportunities in 2003

In 2003, the best export opportunities for U.S. exporters continue to be red meats, pork, and poultry. Other products which are expected to be in high demand are seafood, tree nuts, some types of vegetable oil, and various consumer oriented products such as dairy products, fresh apples, snack foods, etc. Due to an increased number of tourists/foreign visitors and the development of the local hotel/restaurant sector, export niches for high quality U.S. beef are expected to enlarge. However, consumers' disposable income is not likely to increase and may fall slightly due to higher tax burdens and unemployment. Therefore, export prices and payment terms will continue to be of critical importance for Bulgarian importers.

The 2003 trade regime for imports of pork and pork products is more conservative than in 2002, but U.S. exporters still can take advantage of reduced duty import quotas for pork (3,000 MT with 250 Euro/MT in the second quarter of the year; and 1,500 MT with at 15 percent for the whole year); quotas for pork liver (with 10 percent duty) and 9,000 MT of pork fat (zero duty) which are effective until the end of 2003. In the second half of the year, U.S. pork exports may compete with the EU-origin duty free import quota (8,000 MT), especially between July and October when the EU-quota is extensively used. Local demand for pork is estimated to be stable and no significant fluctuations in prices are forecast in 2003.

Unfortunately, U.S. poultry exports (frozen chicken leg quarters) continue to face a highly protectionist policy and trade restrictions such as a 74 percent import duty and minimum import prices. Due to significantly increased Customs inspections and intervention, U.S. exporters should be well informed about local requirements and procedures. Local demand, especially for turkey, will continue to be high. However, U.S. exporters may have to compete with the EU duty free import quota of 1,000 MT in the second half of the year. No preferences such as quotas or reduced import duty will be available for U.S. exporters.

Note: All regimes on a multilateral or bilateral basis are published as attachments to the general Customs Code. These attachments are available by request from FAS Sofia as follows:

Attachment #1.1 List of tariff positions from the First to Twenty Fourth Chapter for which zero import duty is applied for imports from EU countries;

Attachment #1.2 List of tariff positions from the First to Twenty Fourth Chapter for which preferential import duties are applied for imports from EU countries;

Attachment #1.3 List of tariff positions from the First to Twenty Fourth Chapter for which the following import quotas and duties are applied for imports from EU countries;

Attachment #1.4 List of tariff positions from the First to Twenty Fourth Chapter for preferential import duties for imports from EU countries (beverages agreement)

Attachment #1.5 List of tariff positions from the First to Twenty Fourth Chapter preferential import duties for imports from EFTA countries;

Attachment #1.6 List of tariff positions for zero import duties for imports from EFTA countries(seafood agreement);

Attachment #2.1 List of tariff positions from the First to Twenty Fourth Chapter for zero import duties for exports to CEFTA countries;

Attachment #2.2 List of tariff positions from the First to Twenty Fourth Chapter for which the following maximum import duty is applied for imports from CEFTA countries;

Attachment #2.3 List of tariff positions from the First to Twenty Fourth Chapter for preferential import quotas and duties for imports from CEFTA countries (per country);

Attachment #3. List of tariff positions from the First to Twenty Fourth Chapter for preferential import quotas and duties for imports from Turkey;

Attachment #4. List of tariff positions from the First to Twenty Fourth Chapter for preferential import quotas and duties for imports from Macedonia;

Attachment #5. List of tariff positions from the First to Twenty Fourth Chapter for preferential import duties for imports from Israel.

Attachment #6. List of tariff positions from the First to Twenty Fourth Chapter for preferential import duties for imports from Estonia;

Attachment #7.1. List of tariff positions from the First to Twenty Fourth Chapter at zero import duty imported from Croatia;

Attachment #7.2. List of tariff positions from the First to Twenty Fourth Chapter for which the following maximum import duty is applied for imports from Croatia;

Attachment #7.3. List of tariff positions from the First to Twenty Fourth Chapter for which the following import quotas and duties are applied for imports from Croatia;

Attachment #8. List of tariff positions from the First to Twenty Fourth Chapter for which the following import quotas and duties are applied for imports from Lithuania;

Attachment to Art.15/al.1, Ordinance 285/December 9, 2002 - Autonomies tariff reductions for duty free imports or reduced import duty imports for 2003.

Table#1. Temporary Import Quotas for CY2003

HS#	Product	Quantity, Duty and period of validity
HS#0203 29 55 0	Frozen boneless pork meat, other than whole of half carcasses	3,000 MT at 250 Euro/MT April 1 - June 30
HS#0206 41 20 9	Frozen pork liver	10%
HS#0209	Fat	9,000 MT at 0%
HS#0407 00 90 1	Ostrich eggs	0%
HS#0713 33	Dry beans	0% January 1 - July 31
HS#07 13 40	Lentils	0% January 1- July 31
HS#0803 00 11 0	Fresh bananas (bread type)	5.0%
HS#0803 00 19 0	Fresh bananas, other	5.0%
HS#0803 00 90 0	Dried bananas	5.0%
HS#0901 12 00 0	Raw coffee, decaffeinated	0%
HS#1001	Wheat	0%
HS#1003	Barley	0% January 1- June 30
HS#1005	Corn	0% January 1- September 30
HS#1006 10 10 0	Rough rice for planting	0%
HS#1007 00 10 0	Sorghum for planting-hybrid	5.0%
HS#1108 12 00 0	Corn starch for pharmaceutical industry	5%
HS#1210 10 00 0	Hops cones, not grinded nor in granules	5.0%
HS#1210 20 90 0	Other hops cones, grinded or in granules	5.0%

HS#1302 13 00 0	Hops plant juices and extracts	0%
HS#1507 10 90 0	Soybean oil destined for production of food products	3.2%
HS#1511 90 11 0; HS#1511 90 19 0; HS#1511 90 91 0; HS#1511 90 99 0;	Various types of palm oil for food and industrial purposes	3.8%
HS#1513 11 10 0; HS#1513 11 91 0; HS#1513 11 99 0; HS#1513 19 19 0	Various types of cocoa oil	2.5%
HS#1803 10 00 0; HS#1803 20 00 0; HS#1804 00 00 0	Cocoa butter, various types	3.5%
HS#2308 00 90 0	Apple puree for pectin production	2,500 MT at 0%
HS#2309 90 91 0	Pet food in form of sugar beet with added molasses	10.0%
HS#2403 10 10 0; HS#2403 10 10 0	Tobacco for smoking	40.0%
HS#2403 91 00 0	Tobacco folio	5%
HS#2403 99 90 0	Other than tobacco for chewing	5%

Table#2. Duty free or reduced duty import quotas for CY2003 based on Bulgaria-GATT agreement dated 1994

HS#	Product	Quota in MT	Duty in percent
HS#0202	High quality beef	19,800 of which	0% - 10%
incl.0202 20 30 -50	Boneless frozen cuts, quarters	10,200 of which 8,149 for EU countries 2,051 for non-EU countries	8.5%
HS#0207 12 10-90	Chicken, whole, frozen	200	55% min 650 USD/MT
HS#0207 14 19-99	Chicken cuts, frozen	1,300	55% min 650 USD/MT
HS#0210 11 -19	Pork	1,500	15%
HS#0402 10	Milk and cream in powder	200	15%
HS#0405 10-90	Butter	1,500	30%
HS#0406 10-30	Cheese and curd	3,000 of which 2,000 for EU and 1,000 for non-EU countries	17.5%
HS#0406 90	Cheese for processing	400	25%
HS#0701 10	Potato for seeds	1,800	18%
HS#0703 10	Onion	500	25%
HS#0713 10 10-90	Peas	175	10%
HS#0713 20	Chick peas	300	10%
HS#0713 33-39	Dry beans	820	35%
HS#1003 00 90 1	Malting barley	10,000	15%
HS#1005 90 0 1	Feed corn	100,000	5%

HS#1006 30	Rice	5,000 of which 2,880 for EU and 2,120 for non EU countries	12.8%
HS#1601	Processed meat products	2,000	40%
HS#1602	Ready meat products	1,100 of which 900 for EU and 200 for non EU countries	34%
HS#1701 11	Crude sugar	250,000	5%
HS#1704 10	Chewing gum	900	35%
HS#1704 90	Extracts and candy	525	35%
HS#1704 90 30 - 51-61-81-99	Confectionary without cocoa	1,600	35%
HS#1806 20	Chocolate	3,500	35
HS#1806 31	Candy with cocoa	1,150	35
HS#1806 90 11- 19-31-39-50-60- 70-90	Other confectionary	4,090	40%
1905 31-32 -90	Biscuits	1,300	40%
HS#2004 10 10 1	Bulk frozen potatoes	800	10%
HS#2103 20	ketchup	30	40%
HS#2208 20	Spirits from wine/grapes	13,600 hectoliters	40%
HS#2208 40	Rom	40 hectoliters	40% min 42 Euro/hl
HS#2208 50	Gin	30 hectoliters	40% min 35 Euro/hl
HS#2208 90 57 1	Tequila	1,020 hectoliters	40% min 20 Euro/hl
HS#2208 90	Other spirits	5,100 hectoliters	40% min 20 Euro/hl

Table# 3. Bulgarian Import Duties in 2002 and 2003 per Selected Products and Commodity Groups

Bulgarian Import Duties in 2002 and 2003 per Selected Products and Commodity Groups		
HS# Description of the commodity	Import Duty in 2002	Import Duty in 2003
HS#0203 Pork	25% or minimum 664 Euro/MT	25% or minimum 664 Euro/MT
HS#0202 Beef	5% plus 244 Euro/MT	5% plus 97 to 244 Euro/MT
HS#0207 13 Fresh/chilled chicken cuts	68% min 290 - 456 Euro/MT	68% min 260-456 Euro/MT
HS#0207 14 Frozen chicken cuts	74% min 210-500 Euro/MT	74% min 210-500 Euro/MT
HS0207 24-27 Turkey	25% min 100-130 Euro/MT	25% min 100-130 Euro/MT
HS#0210 Meat, salted, dried, cured etc.	25%	25%
HS#1601 Meat products (processed)	40% min 500-640 Euro/MT	40% min 500-640 Euro/MT
HS#0402 21, 0402 29 Powdered milk	68%	68%
HS# 0406 Cheese and curd	25% -30% (74% for feta cheese, from sheep's milk)*	25% - 30% (74% for feta cheese, from sheep's milk)*
HS#1001 Wheat	15% - 25%	15% - 25%
HS#1101 00 Wheat flour	25%	25%
HS#1003 Barley	3% - 20%	3% - 20%
HS#1006 Rice	0% - 15%	7.7% -15%
HS#1005 Corn	5% - 15%	5% - 15%
HS#1201 Soybeans	0%	0%
HS#1206 00 10 0 Sunflower	0%-10%	0%-10%
HS# 2304 Soybean meal	0%	0%

HS# 2306 Other meals including sunflower meal	5% -10%	5% - 10%
HS#2309 Pet food for retail sale	20%	20%
HS#4104, 4104 Hides and skins	0%	0%
HS#5201,5203,5203 Cotton	0%	0% - 5.5%
HS# 1806 90 Chocolate candy	45%	45%
HS# 1905 Biscuit, waffles and other confectionary	15% - 60%	15% - 60%
HS# 2105 Ice cream for retail consumption	22.5% plus 448 Euro/MT	22.5% plus 448 Euro/MT;
HS# 0713 Some types of dry beans	15%- 40%	15% - 40%
HS# 1701 12 Sugar from sugar beet for further processing	50%	50%
HS#1701 91-00 White crystal sugar	160 Euro/MT	160/251 Euro/MT
HS# 2203 Beer	55%	55%
HS# 2402 Cigarettes	50% min 9.6 Euro/1000 PCE	50% min 9.6 Euro/1000 PCE

Table#4. "Double zero" duty free import quotas for EU exports to Bulgaria in 2003 effective July 1, 2003

"Double zero" duty free import quotas for EU exports to Bulgaria in 2003 effective July 1, 2003		
HS#	Product	Quota in MT
HS#0203,0201011-12- 19, 1601,160241- 41- 49	Pork and pork processed products	8,000
HS#0207 excluding 0207 27 910,0207 34,020735910, 020736810, 0207850, 020736890	Poultry	1,000
HS#0406	Cheese and curd	2,700
HS#0702	Fresh tomatoes	700
HS#0808 10	Apples	4,680
HS#1602 31,1602 39	Processed meat	1,000
HS#2002	Processed tomatoes	2,400

Table#5. Selected list of products under "double profit" agreement for EU-origin duty free imports to Bulgaria effective January 1, 2003

Selected list of products under "double profit" agreement for EU-origin duty free imports to Bulgaria effective January 1, 2003		
Product	Quota, MT	Annual Increase
Live hens and cocks, ducks and geese	400	40
Poultry eggs	300	0
Fresh carrots and radish	255	25
Frozen vegetables	300	30
Grapes	1,800	0
Wheat and wheat gluten	55,000	5,500
Rye and rye products	1,000	100
Barley	15,000	1,500
Oats	1,200	120
Corn	28,000	2,800
Sunflower and shafan oil	3,000	0
Poultry meat ready food and cans	1,500	0
Molasses	20,000	20
Frozen potatoes	535	55
Orange juice	520	0
Other citrus juice	462	50
Pet food	1,500	0
Tobacco	6,000	0

Table#6. List of products of EU-origin for which Bulgaria applied preferential treatment (for processed food products) in a form of quotas

List of products of EU-origin for which Bulgaria applied preferential treatment (for processed food products) in a form of quotas			
HS# product	Annual quota, MT, 2002	Annual increase from 2003 on	Duty within the quota, %
HS#1516 20 91 Vegetable oils	1426	119	0
HS#1702 50 00; 1702 90 10 Fructose and maltose	40	-	0
HS#1704 90 Other confectionary without cocoa	320	-	20
HS#1806 10 Cocoa in powder with sugar or other sweeteners	220	20	0
HS#2004 10 91 Processed potatoes in form of flour or flakes	300	-	20
HS#2005 20 10 Processed potatoes in form of flour or flakes	150	-	20
HS#2202 10 Waters with sugar or sweeteners	3,840	320	0
HS#2208 60 Vodka in packages below 2 liters	1,380	-	0
Note: Duties on imports for quantities above the quotas are shown in Table#....X			

Table#7. Summary of duties applied for EU-origin imports to Bulgaria (as a part of trade agreement for processed food products)

Summary of duties applied for EU-origin imports to Bulgaria (as a part of trade agreement for processed food products)	
HS#Product	Duty, %
HS#0403 Milk	32-40
HS#0405 Butter	8
HS#0505, 0506,0507,0508,0509,0510	0
HS#0710 40 00 Sweet corn	24
HS#0711 Canned vegetables	30
HS#0903 Matte	0
HS#1212 Seaweed	0
HS#1302 Vegetable juices and extracts pectin etc.	0-3
HS#1401, 1402, 1403,1404 Plant materials used for basket-making etc.	0
HS#1505 Animal fats	0-8
HS#1506 Other fats	15
HS#1516 processed vegetable and animal oils/fats	0-13
HS#1517 Margarine	20-22.5
HS#1518 Other vegetable and animal fats	5-8
HS#1520 glycerol	5
HS#1521 Plant wax	8
HS#1522 Degra	22.5
HS#1702 Other types of sugar, fructose, maltose	10-25
HS#1704 Confectionary without cocoa	8-35
HS#1803, 1804, 1805 Cocoa	0
HS#1806 Chocolate	25-35

HS#1901 Malt	8-35
HS#1902 Pasta	25-35
HS#1903 Tapioca	5
HS#1904 Corn flakes etc	22.5-25
HS#1905 Bakery products	12-25
HS#2001 Canned vegetables	5-18
HS#2004 Other preserved vegetables	18-36
HS#2005 Other preserved vegetables	12-36
HS#2008 Canned fruits	0-30
HS#2101 Extracts from coffee, tea etc.	3-25
HS#2102 Yeast	8-60
HS#2103 Sauces, spices, additives	0-27
HS#2104 Ready soups	35
HS#2105 ice cream with cocoa	29
HS#2106 Other food products	8-40
HS#2201 Waters	3-22.5
HS#2202 Other types of waters	15-36
HS#2203 Beer	29% min 8.14 Euro/hl
HS#2205 Vermouths	22.5 or 1.6 Euro/%vol/hl + 7.9 Euro/%vol/hl
HS#2207 Alcohol	13 Euro/hl-24 Euro/hl
HS#2208 Other alcohol, various types	36% min 0.68 Euro/%vol/hl + 4.05 Euro/hl to 40% min 0.75 Euro/% vol/hl + 4.5 Euro/hl
HS#2402 Cigars and cigarettes	36% to 50% min 9.6 Euro/1,000 pce

HS#2403 Other tobacco substitutes	3-40
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Table #8. Import preferences for EU origin alcohol beverages

Import preferences for EU origin alcohol beverages	
HS#	Duty
2208 20 12 0	20% min 0.17 Euro/%vol/hl +1.05 Euro/hl
2208 20 14 0	20% min 0.17 Euro/%vol/hl +1.05 Euro/hl
2208 20 26 0	20% min 0.17 Euro/%vol/hl +1.05 Euro/hl
2208 20 27 0	20% min 0.17 Euro/%vol/hl +1.05 Euro/hl
2208 20 29 0	20% min 0.17 Euro/%vol/hl +1.05 Euro/hl
2208 30 11 0	15% min 1.26 Euro/%vol/hl +3.45 Euro/hl
2208 30 32 0	15% min 1.26 Euro/%vol/hl +3.45 Euro/hl
2208 30 52 0	15% min 1.26 Euro/%vol/hl +3.45 Euro/hl
2208 30 72 0	15% min 1.26 Euro/%vol/hl +3.45 Euro/hl
2208 30 82 0	15% min 1.26 Euro/%vol/hl +3.45 Euro/hl
2208 40 11 0	20% min 0.45 Euro/%vol/hl +1.6 Euro/hl
2208 40 31 0	20% min 0.45 Euro/%vol/hl +1.6 Euro/hl
2208 40 39 0	20% min 0.45 Euro/%vol/hl +1.6 Euro/hl
2208 50 11 0	20% min 0.45 Euro/%vol/hl +1.6 Euro/hl
2208 50 91 0	20% min 0.50 Euro/%vol/hl +3.2 Euro/hl
2208 60 11 0	15% min 0.60 Euro/%vol/hl +2.4 Euro/hl
2208 60 91 0	15% min 0.60 Euro/%vol/hl +2.4 Euro/hl

Table#9. Preferential duties for EFTA -origin products imported to Bulgaria in 2003

Preferential duties for EFTA -origin products imported to Bulgaria in 2003	
HS#	Duty, %
1505 00 90 0	5
1518 00 39 0;1518 00 91 0;1518 00 95 0;1518 00 99 0	5-10

1704 10	10
1805	10
1806 20; 1806 31;1806 32;1806 90	25
1901 90 91 0; 1901 90 99 0	10
1902 19	25
1904 10	25
1905 31; 1905 32;1905 90	25
2101 11;2101 12	3
2101 10 31 0;2102 10 39 0; 2102 20; 2102 30;	20 10 8
2103 20; 2103 90	25 8
2105	29
2106 10; 2106 90 excl. 2106 90 20 0	10 3
2201 90	5
2202 90	15
2203	29 min 8.14 Euro/hl
2205 10	25

Table#10. Selected Reduced Duty Quotas for the EU (quotas above 1,000 MT) in CY2003

Selected Reduced Duty Quotas for the EU (quotas above 1,000 MT) in CY2003	
Commodity	Quota
HS# 0202 20 30, 0202 20 50 Beef	8,149 MT at 8.5 %
HS# 0402 10, 0402 21 Powdered Milk	2,954 MT at 12.8%
HS#0707	1,130 MT at 40%
HS#0806 10 10 1; 0806 10 90 2 Grapes, fresh and dried	1,098 MT at 40%
HS#0809 30	400 MT at 34%; 1,621 MT at 40%
HS# 1006 30 Rice	2,880 MT at 12.8%
HS# 1516 20 10 91 Animal and/or vegetable fats and oils	1,545 MT at 0%; 330MT at 10.5%
HS#1517 10 Margarine	1,316 MT at 10.5%
HS#1602 50 Ready Meat Foods and Meat Cans	950 MT at 34%
HS# 1701 99 Sugar	21,888 MT at 34%
HS# 2202 10 Mineral Water	4,160 MT at 36%
HS# 2204 10; 2204 21; 2204 29	73,100 hl at 0%
HS# 2208 60 11 0; 2208 60 91 0	3,000 hl at 0%
HS# 2309 90 Pet Food	12,752 MT at 8.5%
HS# 2401 Tobacco	6,000 MT at 7% to 28%