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Oilseeds and Products

Annual

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Report Highlights:
In MY02/03 Bulgaria is likely to have record high exports of sunflower seeds, 178,000 MT due to good quality and quality of the crop. Forecast for MY03/04 is for further increase in sunflower exports close to 250,000 MT due to expected higher production. In MY02/03, Bulgaria imported record high volume of soybean meal, 82,000 MT/ $17.0 million (mainly from Argentina and Brazil) and 3,000 MT from the United States; these imports are projected to be stable in MY03/04. After record high imports of soy oil in MY01/02, 22,000 MT, imports of soy oil in MY02/03 are likely to drop to 10,000 MT due to sufficient local supply of sunflower oil.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Executive Summary

This report contains final information about MY01/02, preliminary data about MY02/03 and forecast for MY03/04. Sources of data for this report are industry and local government contacts, as well as the oilseed bulletins of Bulgarian Ministry of Agriculture.

Imports of soybeans in MY02/03, which have never been significant in Bulgaria due to lack of crushing facilities (last significant imports of 12,000 MT of U.S. soybeans in December 2001), consisted **of only 514 MT (239 MT from China and 166 MT from Greece)**. These imports were driven by lack of local raw materials for processing into vegetable oil due to poor local sunflower crop in MY01/02 but also by the high demand for soybean meal. Bulgaria did not import soybeans (not for planting) in 2002 and will not likely in 2003, due to anticipated good sunflower crop in both years.

Imports of soybean meal in MY01/02 were record high for the last three years and reached 62,000 MT (av. 5,200 MT/month). This trend continued and in CY2002, soybean meal imports increased to 79,000 MT and 3,000 MT as a donational imports (av. 6,500 MT/month). For the period January - March 2003, soybean meal imports totaled 26,000 MT or an average monthly consumption of 8,000 MT which will likely continue for the rest of CY2003. The major reason for higher soybean meal imports was the development of the poultry industry. Development of pork industry has been uneven, thus demand for soybean meal by pork producers fluctuated. The forecast for MY03/04 is for stabilization of soybean meal imports at higher levels.

An interesting market trend over the last two years is increased imports of vegetable oils other than sunflower oil. This trend is related to the lack of sufficient local production of sunflower oil; and to the development of the food processing industry and food service sector. In MY00/01, total imports of vegetable oils were 24,000 MT (6,400 MT soybean oil and 6,500 MT sunflower oil). In MY01/02, vegetable oil imports increased to a record high level of 68,600 MT with the major share of soy oil, 22,000 MT, mainly due to the local shortage of sunflower oil and its higher prices. In MY02/03, vegetable oil imports are likely to drop to the traditional level of 28,000 MT, however, soybean oil is expected to continue to account for the largest share in imports, 10,000 MT. Soybean oil, in general, is expected to increase its market share to at least 5-10 percent as part of overall human consumption in the next two years. The United States exported record high quantity: 2,573 MT of soy oil to Bulgaria in MY01/02.

Sunflower crop stabilized in MY02/03 after the drop in MY01/02 due to maintenance of crop areas and attractive farm gate prices from the previous crop year. Higher area and yields in MY02/03 led to almost 45 percent increase in production for total sunflower and 47 percent increase for oil-bearing sunflower due to favorable climate conditions. The forecast for MY03/04 production depends greatly on the emergence of fall planted crops, which were damaged during the low temperatures is December-February. Farmers in major production areas report re-ploughing of wheat and barley and planting of sunflower. Therefore, MY03/04 area and production might reach unusual record high levels, about 600,000 HA and 700,000 MT, stimulated by

reduction in fall crops.

Exports of sunflower seeds increased to 139,000 MT-140,000 MT in MY01/02 thanks to attractive international and regional prices; exports are forecast to increase further to 178,000 MT-180,000 MT in MY02/03 due to good local crop and favorable regional and world market. These exports are expected to be ongoing in MY03/04 (up to 250,000 MT) due to expectations for a stable world market situation (although regional competition is expected to be much tougher which would affect export prices).

MY01/02 exports of sunflower oil declined to 17,000 MT due to Bulgaria's low international competitiveness (unsatisfactory quality) and the forecast is to restore exports to more traditional level of 19,000 MT in MY02/03 and in MY03/04.

Imports of sunflower planting seeds have prospects to grow, thus substituting local planting seeds i.e. not due to increased planted areas. In MY03/04, however, importers have already reported high imports due to increased planted area.

TOTAL OILSEEDS

PRODUCTION

General

Soybeans

The data in the PS&D table for soybeans for MY01/02 and MY02/03 is based on final official data. As seen from production tables below, local production was practically nil over the last three years due to unfavorable conditions. Significantly higher soil moisture and precipitation in the spring of 2002 encouraged a slight increase in planted area which reached 3,000 HA. Forecast for MY03/04 is for the same area of 3,000 HA. However, this is extremely limited production (MY02/03 production at 4,000 MT) compared to local needs of soybean products. In the medium-long term, this situation is not likely to change due to lack of irrigation systems and naturally unfavorable weather conditions. For this reason, this report focuses mainly on imports/consumption of soybean products and not on local production.

In MY01/02, a new oilseed crop, not traditional for Bulgaria attracted the attention of farmers, fall rapeseed. In 2001, the crop area was 17,200 HA and production reached 19,000 MT. In 2002, planted area was 10,300 HA, average yield was 1.17 MT/HA and total production reached 12,000 MT (8,000 MT according to other sources). Although this crop is still new, the profitability is high, exports are good (4,000 MT for CY2002) and it is expected that farmers will start paying more attention to these opportunities. Most of local rapeseed production is destined for local crush (only one facility) for bio-diesel, which is afterwards exported to the EU, mainly to Germany.

Sunflower

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

Table #1. Production Table for MY2000/2001 - MY2002/2003						
Crops	**Planted Crop Area, HA**			**Production, MT**		
	2000	**2001**	**2002**	**2000**	**2001**	**2002**
Soybeans	**1,625**	**1,280**	**3,000**	**1,500**	**850**	**4,000**
Sunflower						
Oil type	**565,000**	**355,000**	**433,000**	**539,000**	**355,000**	**523,000**
Black & white	**25,000**	**43,000**	**44,000**	**19,000**	**37,000**	**48,000**
Total Sunflower	**590,000**	**398,000**	**477,000**	**558,000**	**392,000**	**571,000**

Note: Harvested area for MY00/01 was estimated at 560,000 HA. Harvested area for oil bearing type sunflower (industrial) in MY01/02 was 348,000 HA; 41,000 HA for striped(birdseed) sunflower and total 389,000 HA for total sunflower. Harvested area for oil bearing type sunflower (industrial) in MY02/03 was 424,000 HA; 43,000 HA for striped(birdseed) sunflower and total 467,000 HA for sunflower (see PSD table).

In MY01/02, total planted area for sunflower seed was estimated at 398,000 HA (final harvested area 389,000). The main reason for the decline was the continued drought, lack of irrigation due to poor infrastructure, and the high price of irrigation water. Generally, farmers switched to more drought resistant crops such as wheat. Another factor for the decline in area in MY01/02 were relatively low farm gate prices. As a result, sunflower area in 2001 accounted for 12 percent of total cultivated agricultural land versus 17.4 percent in 2000.

In MY02/03, sunflower planted area increased by 19.8 percent to its more traditional level. The major reason for this increase was higher farm-fate prices of sunflower seeds, and good export opportunities. The highest increase was registered in Northeastern region, 42.2 percent; North central region, 28.7 percent; and, Southwestern region, 25.9 percent. As a result, the sunflower share in total crop cultivated area increased from 12.0 percent in MY01/02 to 14.6 percent in MY02/03.

The forecast for MY03/04 is for continuation of this trend. It is projected that sunflower planted area may reach its MY00/01 level of about 600,000 HA or even higher. The major reasons for this increase are:
-as explained above, the significant percentage of destroyed fall crops, wheat and barley, which will be re-sown with spring crops, mainly sunflower;
-favorable farm gate prices for sunflower and good export opportunities in MY02/03;
-better market prospects/and profits for sunflower over other spring crops options, mainly corn.

MY01/02 production was estimated at gross/harvested weight of 405,000 MT, which after a deduction of 3.2 percent foreign matter, is converted into 392,000 MT total production. Out of the total, 355,000 MT is oil bearing (industrial) sunflower, and

37,000 MT is striped (birdseed) sunflower. MY2001/02 production was not sufficient to meet local demand.

MY02/03 total sunflower production was estimated at gross harvested weight of 592,000 MT of which 3.5 percent foreign matters or 571,000 MT final total production. Out of this, 48,000 MT was striped (birdseed) sunflower and 523,000 MT was oil bearing (industrial) sunflower.

MY02/03 production is 45.6 percent higher than in MY01/02 due to both higher areas and yields. Yields in MY02/03 were significantly higher than in the previous year due to favorable weather conditions, 1.22 MT/HA, compared to 1.00 MT/HA in the previous year. Quality of oil bearing sunflower also improved with a registered increase in the oil content to 41-42 percent, or 1-2 percentage points higher than in MY01/02 (with standard moisture of 11 percent).

Expectations for MY03/04 are for a good crop based on favorable weather conditions so far in the year and the willingness of farmers to compensate for the losses from fall crops. The limiting factor might be the use of certified seeds which are currently in shortage due to unexpectedly high demand. The AgSofia forecasts average yields similar to MY02/03 which will lead to a total production close to 700,000 MT.

Production Problems

Crop rotation: In MY01/02, 52 percent of sunflower is grown after wheat, 11 percent after barley and 16 percent after sunflower. In **MY02/03, these figures are 60 percent, 13 percent and 10 percent, respectively. Crop rotation in** the previous three years was similar. In MY03/04, the percent of sunflower planted after wheat/barley will increase due to re-sowing of destroyed fall crops.

Planting seeds: The use of certified planting seeds is usually 2,000 MT to 3,000 MT depending on the planted area. Over the last three years, about 80 - 85 percent of all sunflower growers use certified planting seeds.

In MY00/01, the share of imported planting seeds increased to 50 percent (1,100 MT) out of total 2,000 MT due to lower planted area. In MY01/02, imports of planting seeds were lower, 429 MT, of which 149 MT were imported from France, 121 MT from the U.S., and smaller quantities from Hungary . In MY02/03, total use of seeds was 2,300 MT due to increased planted area.

In **MY03/04**, demand for planting seeds is higher than usual which is estimated to lead to higher imports due to inability of local producers to meet this demand. According to industry sources, locally produced seeds will be available for 250,000 HA or 1,250 MT; the rest of the planted area or about 350,000 HA will be planted with imported planting seeds or 1,750 MT which is 58 percent market share. **It is estimated that only U.S. origin seeds share will increase to about 20 percent of total planted area or on 120,000 HA.**

Average Yields: Traditionally, the regions with the highest average yields (1.5-2.5 MT/HA) are in the north-east: Varna, Rousse, Dobrich; and some areas in north-central Bulgaria. Potential yields from local hybrids is 2.0-2.7MT/HA (local and imported planting seed). Good private growers register yields from 1.6 MT/HA to 2.2 MT/HA.

In MY01/02, the highest yields were recorded in north-central and north-west Bulgaria, 1.33 MT/HA with an average for the country at 1.0 MT/HA. In MY02/03, yields were higher due to better weather and averaged 1.22 MT/HA with record yields reaching 2.5 MT/HA.

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

MY01/02 - 48 percent treated with nitrogenous fertilizers; 3 percent with phosphorus fertilizers; and 3 percent with combined fertilization; 55 percent treated with herbicides, 7 percent with insecticides and 8 percent with fungicides
MY02/03 - no official final data is available but industry sources indicate higher use of fertilizers and plant protection chemicals.

Production Policy

In 2002, Fund Agriculture had four credit lines supporting use of fertilizers, plant protection chemicals, diesel fuel for harvest works as well as use of certified planting seeds. These programs were preserved in 2003. For the first time in 2003, a government program to support soybean production was introduced as follows:

MinAg programs for oilseeds in 2003		
Soybeans	$0.07 million	Starting date: 1 April 2003
Spring crops	$1.65 million	
-incl.corn	$0.3 million	Starting date: 1 March 2003
-incl.sunflower	$0.6 million	Starting date: 1 March 2003
-incl. fertilizers for both spring crops	$0.750 million	

Prices

Soybeans

Average farm-gate prices in MY00/01 were about 500 leva/MT ($250/MT). In MY01/02, the price dropped to 500 leva/MT ($227)/MT. The average prices in MY02/03 were about the same 400-420 leva/MT ($216-225/MT). Since local production is very limited, these prices are only for purchases by small soya extruders for production of full fat soya meal. Imports of soybeans are not traditional. Thus, there is no competition between local production and imports.

Sunflower

In **MY01/02**, **farm gate prices** reached a record high due to very limited local supply and keen competition among local crushers and exporters (ref: BU#2007). By November 2001, farm gate prices was 25-28 percent higher than in the same period in MY00/01. Trade in 2002 continued at 500-600 leva/MT ($227-$272/MT).

Average monthly **export prices** in MY01/02 were FOB $190-220/MT FOB and DAF $201-217/MT DAF which is about $30-35/MT higher than in MY00/01 (ref: BU#2007.). The average MY01/02 FOB price was $208/MT and DAF price was $220/MT.

Export prices of Bulgarian sunflower seeds in MY01/02, USD/MT													
	2001				**2002**								**Av.**
	09	10	11	12	1	2	3	4	5	6	7	9	
FOB	190	207	438	220									**208**
DAF	201	204	217	206	216	225	232	209	253	0	171	217	**220**
Source: MinAg Sunflower Bulletin, October 2002													

In **MY02/03**, farm gate prices started from 360-370 leva/MT ($180-$185/MT) but due to tight competition between exporters and crushers, the prices quickly went up to 380-400 Bleva/MT ($200-$210/MT). Since mid-December 02, sunflower was not actively traded due to declining stocks. Prices stabilized at high levels, about 401 leva/MT ($211/MT), and 420 leva/MT ($221/MT) for small irregular lots. As of March/April 2003, **prices stabilized at 400 –420 leva/ MT ($216-227/MT)**.

Average export price in MY02/03 for the period October- December was $243/MT .

Production cost: According to local independent experts, production cost for 2002' sunflower crop per a hectare is about 495 leva/HA ($267/HA). Provided that average yield is about 1.27 MT/HA, the average production cost per a metric ton is about 390 leva/MT ($210/MT). It means that upon average farm gate prices of 400 leva/MT ($216/MT), producers will work at a small profit. These average indexes, however, range widely depending on the farms, their size, management etc. Large commercial farms have reportedly worked at a profit for the last 3-4 years due to good export and farm gate prices (usual yields above 1.3 MT/HA).

CONSUMPTION

Soybeans

All soybeans produced in the country are used for crushing by small- medium sized extruders. The usual beans-to-meal conversion rate is about 82-83 percent. This

locally produced meal is used for on-farm feeding of poultry and is not commercially important. In 2001, 12,000 MT of U.S. beans were crushed by a local crushing factory into about 10,000 MT-11,000 MT of soybean meal (ref. #BU2007).

Sunflower

Crush use

In MY01/02, low production and higher exports led to record low quantities of crush, 230,000 MT, less than expected consumption of 275,000 MT (see revised PSD table), which is about 50 percent lower then in the previous year. This decline was a result of smaller crop, increased exports and higher export profits than local processing. This amount was not sufficient to meet local needs for vegetable oil and imports of ready for consumption vegetable oil increased to record high 68,600 MT.

In MY02/03, crush consumption is estimated to reach 365,000 MT, 60 percent more than MY01/02, or closer to the traditional level due to larger sunflower crop. According to industry sources, crushers have purchased about 400,000 MT (by October-November 2002) of which about 35,000 MT are estimated exports by crushers (some crushers make higher profit from exports than from crushing). This means sun oil production will reach 124,000 MT, which should be relatively sufficient to meet local needs combined with little imports.

Forecast for MY03/04 is for similar level of crush consumption, 365,000 MT. It is expected that despite the available capacity for higher crush use, the profitability of crushing and exports of oil will be lower than exports of sunflower seeds which will motivate crushers to act as traders. This situation may change, however, if the world and regional markets will discourage sunflower seeds exports.

Other use

In MY01/02, consumption for "other than for crush use of sunflower", was estimated at 29,000 MT (18,000 MT for nuts for snack consumption/confectionary sunflower seeds, and 11,000 MT for khalva, local sweet). MY02/03 "other use" consumption is estimated to recover to 30,000 MT and the same amount is forecast for MY03/04.

TRADE

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

Imports

Soybeans

Imports of soybeans were significant only in MY01/02 due to record low domestic production of sunflower (ref: BU#2007). These imports were 16,178 MT/$3.0 million of which the leading imports were from the United States, 12,000 MT ($2.5 million), followed by Turkey, 3,606 MT. The average import price of soybeans was $182/MT.

Sunflower

In MY01/02, imports reached about 9,000 MT/$3.0 million (8,316 MT for industrial crush use, and 429 MT for planting seeds) due to local shortages. Major exporters of sunflower seeds to Bulgaria were Moldova, 3,800 MT and Romania, 2,500 MT. Major exporters of seeds to Bulgaria were France and the United States. In value, planting seeds imports were equal to imports of sun seeds for crush use, each at $1.5 million. Average import price of sunflower seeds for crush was $191/MT and average import price of planting seeds was $3,697/MT. Imports of sun seeds for crush were limited due to high international prices, therefore, only small lots came from regional suppliers. Instead, buyers imported vegetable oils for further refining or for direct consumption.

No significant imports except for planting seeds and small regional lots are expected in MY02/03, so total imports are estimated at 7,000 MT. Between October and December 2002, imports totaled 3,068 MT (2,500 MT from Moldova and 320 MT from Greece). In MY03/04, imports are expected to be limited to mainly planting seeds, about 3,000 MT.

Exports

Soybeans

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

Sunflower

In MY01/02, exports totaled 140,000 MT of which 103,000 MT ($23.0 million) oil bearing sunflower seeds and 37,000 MT ($23.0 million) of striped sunflower (see PSD table and trade matrixes). Export trade matrix shows both oil bearing and confectionary sunflower exports. Confectionary sunflower exports are shown in the table below.

Average export prices were $223/MT for oil-bearing sunflower seeds and $612/MT for confectionary sunflower seeds. Major markers were Turkey, 66,000 MT and Spain, 23,000 MT. High international prices and high demand on the part of Turkey and the EU stimulated Bulgarian exports.

MY01/02 Exports of confectionary sunflower seeds, MT

Germany	13,558
Austria	11,982
Finland	6,450
Denmark	2,927
Turkey	856
Sweden	1,334
Total	37,651

In MY02/03, exports are projected to reach 178,000 MT-180,000 MT or 28 percent higher than in MY01/02 due to good international demand. Out of total exports, 130,000 MT are oil bearing sunflower and 48,000 MT or all production of striped sunflower. Major export markets for Bulgarian sunflower in MY02/03 were Spain (58,000 MT) and Portugal (27,000 MT). MY02/03 exports as of end-2003 have reached 171,244 MT as follows:

MY02/03 Sunflower exports for the period October - December 2002, MT	
Spain	57,883
Portugal	26,910
The Netherlands	24,897
France	14,147
Turkey	12,321
Romania	7,796
Austria	7,186
Germany	6,850
Finland	5,010
Denmark	1,967
Total	171,244/USD 42 .0 million

Forecast for MY03/04 are for much higher exports, close to 250,000 MT, mainly due to expected good crop. The last time Bulgaria exported a similar volume was in MY99/00, when exports reached 234,000 MT, however, at that time the regional competition was weak and demand in Turkey was high. These export plans for MY03/04, will be increasingly difficult to achieve due to anticipated tight regional competition from Ukraine, Romania and other Eastern European countries. Another key external factor will be the exchange rate of the U.S. dollar to the local currency: if the rate increases, exports will be stimulated by lower export prices in hard currency. If sunflower exports will not reach these levels, the country will risk to have extra high stocks.

POLICY

Trade

Imports

Import duties:

	CY2000	CY2001	CY2002	CY2003
HS#1201 Soybeans				
- planting seeds	0%	0%	0%	0%
- commercial	0%	0%	0%	0%
HS#1206 00 10 - Sunflower planting seeds	7 % general duty; 4.9 % preferential duty;	0%	0%	0%
HS#1206 00 910 Striped sunflower	12 % general duty; 8.8 % preferential duty	5 % general duty; 3 % preferential duty	5%	5%
HS#1206 00 99 Black oil bearing	April 1 - September 30 - 0 % October 1- March 31 - 12 % general duty, 7% preferential duty	April 1 - September 30 - 0 % October 1- March 31 - 10 % general duty, 7% preferential duty	April 1 - September 30 - 0 % October 1- March 31 - 10 % (0% for 2002)	April 1 - September 30 - 0 % October 1- March 31 - 10 % (0% for 2002)

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

In 2002, Bulgaria implemented preferential duties for selected countries which were equal to 70 percent of the general duty. These preferences granted unilaterally to countries such as Egypt, India, Argentina, Philippines, Pakistan, etc. Imports from Macedonia, EFTA, CEFTA are levied as general import duties. In 2002, sunflower imports from the EU are duty free. However, since the EU is not a sunflower exporter, it is not likely Bulgaria will import EU sunflower seeds. In **2003, these preferences continued to be effective.**

Trade in sunflower planting seeds between Bulgaria, CEFTA and Croatia (since 2002) is fully liberalized since 1999.

Following are the CY2002 **and CY2003 tariffs/quotas** for oilseeds according to the EU, CEFTA, and bilateral trade agreements:

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

Exports

Since October 1998, exports of sunflower-seed have been fully liberalized. Since CY2000 (and in CY2002 **and CY2003),** Bulgarian exports to EU, EFTA, CEFTA and Macedonia are executed at the respective general import duties for third countries. Exceptions include the Czech Republic and Slovenia, where Bulgarian sunflower is regulated within quotas of 3,000 MT and 100 MT, respectively; at a 10 percent import duty. Poland can import Bulgarian sunflower seeds year round and at a preferential duty of 4.5 percent.

According to the free trade agreement with Turkey, Bulgaria can export sunflower-seed annually in the period January 1 - August 31 up to 25,000 MT quota (oil bearing and striped) at zero import duty. In 2002, Bulgaria over-filled this quota and exported to **Turkey total 59,625 MT** (42,600 MT between January 1, 2002 and August 31, 2002).

TOTAL MEALS

PRODUCTION

General

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

Bulgaria is not normally a producer of soybean meal due to lack of raw materials. The sizable production reported in MY01/02, about 10,000 MT - 11,000 MT of soybean meal was produced from imported U.S. soybeans (12,000 MT). In MY02/03, production was small, about 3,000 MT, with the same forecast for MY03/04.

Sunflower meal is a secondary product for crushers after table oil and it is not considered to be profitable. Therefore, oil drives the sunseed crush margins, while meal leads the soya crush margin.

CONSUMPTION

General

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

Due to stabilization in the poultry industry in the last several years, and especially in MY01/02 and MY02/03, imports and consumption of soybean meal increased. A positive trend is that an increasing number of poultry and feed operations are trying to improve the quality of their feed using higher protein content meals, so the increase in demand is driven not so much by the poultry numbers as by the improvement in feed quality. This has led to the establishment of small-medium size feed operations within livestock complexes which allows for better control on quality and production costs of locally manufactured compound feed. This trend is more typical for commercial operations due to increase in share of commercially produced poultry meat versus on-farm, non-commercial poultry production.

Total Poultry Inventory and Commercial Poultry Meat Production in Bulgaria for the period 1999-2001			
	2001	**2002**	**2003F**
Poultry, total, inventory	17,800,000	18,700,000	18,500,000
incl. layers, numbers	8,300,000	8,500,000	8,300,000
broilers	7,500,000	8,000,000	8,000,000
turkey	600	600	600
geese	800	600	600
ducks	600	1,000	1,000
Commercial poultry meat production, MT	35,000	45,000	50,000
Total poultry meat production, MT (commercial and non-commercial)	106,000	110,000	115,000
Source: Poultry Producers Association			

In the PS&D table, soybean meal consumption for MY01/02 was 76,000 MT and estimated at 84,000 MT in MY02/03. The forecast for MY03/04 is for the stable consumption levels at 84,000 MT although first import figures for early 2003 assume higher monthly consumption. Official figures are used in the PS&D tables.

A limiting factor in soybean meal consumption in MY02/03 and MY03/04 is likely to be decreased farm-gate prices for live pigs in the second half of 2002 and first half of 2003 which is leading to slaughter at small/medium size farms and restructuring of larger commercial farms. However, since pork industry is not the leading consumer of soybean meal, it is estimated that overall consumption may stay stable at its 2002 level.

Sunflower meal consumption in MY01/02 dropped to record low level of 88,000 MT due to lower production. In MY02/03 and MY03/04, this use is estimated to restore to higher level of 115,000 MT to 120,000 MT as in the past years.

TRADE

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

Imports

No imports of sunflower meal were registered between MY1999/00 and MY02/03. No imports are expected for MY03/04.

Imports of soybean meal were driven by livestock demand (see consumption section) and competitive prices of Latin American soybean meal. Argentina remained the largest supplier of soybean meal to Bulgaria with a market share of 45 percent in MY01/02, followed closely by Brazil with almost the same market share of 44 percent. The United States did not export commercially any soy meal in MY01/02 due to its high prices. In 2002, there were imports of **3,000 MT of U.S. origin hi-pro soybean meal which was imported as a humanitarian donation and used commercially by industry**. No imports form the United States are projected in MY02/03 and MY03/04

Exports

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

Sunflower meal was exported mainly to Turkey and Macedonia. In MY01/02, lower production and higher livestock demand led to low exports of 17,000 MT of which 10,100 MT for Turkey and 3,600 MT for Macedonia. The forecast for MY02/03 and MY03/04 is for 20,000 MT, due to more stable local demand for feed and expectations for higher domestic supplies. These exports are not likely to increase in line with increased production due to expected favorable local demand.

Import duties CY2003

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

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

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

Macedonia
HS#2307 00 - 200 MT duty free

TOTAL OILS

PRODUCTION

General

Bulgaria does not produce soybean oil due to lack of raw materials. In MY01/02, there was some production of oil from the 12,000 MT of imported soybeans (ref: BU#2007).

Local shortage of vegetable oils stimulated imports which reached record high level of 68,600 MT: sunflower oil, soybean oil, palm oil and rapeseed oil. These imports were also stimulated by other factors such as increased income, development in consumer preferences for a better variety of cooking oils; the development of the food service and tourist industries.

In MY02/03, sufficient local crop is not likely to stimulate high imports. For the period October-December 2002, sunflower oil imports **were only 280 MT, from Turkey**. Forecast for an abundant MY03/04 sunflower crop will not stimulate imports; therefore, trade is expected to remain at **about 6,000 MT-7,000 MT of sunflower oil and total 28,000 MT including other vegetable oils for consumption (excl soybean oil)**.

Sunflower

In MY01/02, crush consumption for oil was record low, 230,000 MT, almost 50 percent down from the previous year, due to limited supply. Estimated sunflower oil production was 76,000 MT (33.1 percent extraction rate).

Due to just emerging markers for other than sunflower oil, it is very difficult to find data or any estimates about various oils market shares and consumption. The official MinAg bulletins merges all vegetable oils with sunflower oil supply and demand balance due to their relatively small share.

Since most imported vegetable oils were sold (and consumed) locally under "sunflower oil" label due to prevailing mass consumer preferences towards sunflower oil, imports excluding soybean oil are included in the sunflower oil PSD table as "sunflower oil imports". Thus, in the PSD sunflower oil table, MY01/02 imports are 47,000 MT (all vegetable oils excluding soybean oil).

It is important to note that imports of crude/refined oil in MY01/02 were more profitable for traders/crushers than imports of raw materials due to low efficiency of local crushing industry (similar to grain processing/milling industry). It is expected that this situation will continue to be valid in the next 3-5 years until the needed modernization and upgrading of local facilities is done. In the this period, if shortages occur, the country is likely to be a net importer of vegetable oils rather than oilseeds.

MY02/03 sunflower oil production is estimated to reach more traditional level of

124,000 MT obtained from 365,000 MT sunflower seeds. The conversion rate is expected to be slightly higher, 0.34 versus 0.33 in MY01/02 due to higher oil content of MY02 sunflower seeds. This production will be 50,000 MT more than MY01/02 (see PSD table). The same level of production is estimated for MY03/04.

CONSUMPTION

General

Soybean oil

Consumption of soybean oil in MY01/02 was mainly for household use due to sunflower oil shortage. In most cases, soybean oil was mixed with sunflower oil and sold under "sunflower oil" label. This illegal practice led to consumer complains about "unpleasant odor" upon frying and cooking (the usual use of sunflower oil is both as a salad oil and as a cooking oil). On the other hand, this perception showed the existent market niches for development of higher variety of "salad oils" different from sunflower oil. According to industry sources, the number of consumers who preferred to use "other than sunflower properly labeled "salad oils" increased.

Due to lack of any reliable data, it is difficult to estimate the share of industrial and household consumption. According to some industry sources, total industrial consumption increased from 3,000 MT to 5,000 MT in MY01/02 for production of paints. No change in industrial consumption is expected in MY02/03 and MY03/04.

Household (direct) consumption of soy oil in MY01/02 was the highest for the last 10 years at 17,000 MT. However, it is expected that the major portion in this consumption was under "sunflower label". In MY02/03 and MY03/04, this type of consumption will go down to 5,000 MT which is the share of identified soybean oil consumption (not mixed with other oils and consumed as soybean oil). Human consumption of soybean oil is forecast to stay stable with prospects for growth in medium term.

Sunflower oil

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

In MY01/02, local vegetable oil needs are estimated at with 128,000 MT (used in the PSD table) - 135,000 MT (other sources estimates), of which 79,000 MT of sunflower oil. Human consumption was estimated at total 102,000 MT of which 67,000 MT sunflower oil; 18,000 MT other vegetable oils and 17,000 MT soybean oil. Industry use was estimated at total 26,000 MT of which 19,000 MT sunflower oil; 9,000 MT other vegetable oils and 5,000 MT soybean oil. These needs were met by imports of vegetable oils, 68,600 MT to include sunflower oil, soya oil, palm oil and rapeseed oil. The PSD table (consumption) shows consumption of sunflower oil and other vegetable oils excluding soybean oil which is given in a separate table.

In MY02/03, total vegetable oil consumption increased to 135,000 MT. Human consumption is estimated to increase to 108,000 MT (13.5 liters per capita annually) compared to 102,000 MT in MY01/02 (13.0 liter pe capita annually). This includes mainly sunflower oil, as the share of sunflower oil in MY01/02 was the lowest, only 67,000 MT or 65 percent. In MY02/03, sunflower oil is expected to restore its traditional share in total human consumption and to account for 91 percent with a sharply declining share of other vegetable oils including soybean oil.

Consumption of vegetable oils in MY01/02 and MY02/03 in Bulgaria in MT					
Total for Human Use (1)=(2)+..(5)		Sunflower oil (2)	Other vegetable oils (3)	Sunflower Oil PSD table (4)=(2) + (3)	Soybean Oil (5)
MY01/02	102,000	67,000	18,000	85,000	17,000
MY02/03	108,000	98,000	2,000	100,000	5,000
Total Industrial Use					
MY01/02	26,000	12,000	9,000	21,000	5,000
MY02/03	27,000	19,000	3,000	22,000	5,000
Source: Ag Office estimates					

In MY01/02, industrial consumption was estimated at 26,000 MT and 27,000 MT in MY02/03. Industrial use is mainly for canning, fish processing and confectionary industries; and in MY02/03 this type of use was estimated at 8,000 MT versus 9,000 MT in MY 01/02 . The majority of other industrial consumption goes for production of mayonnaise and margarine (14,000 MT as the content of sunflower oil in these two local products vary from 40 percent to 80 percent in MY01/02; and 16,000 MT in MY02/03); and small amounts (1,000 MT in MY01/02 and 3,000 MT in MY02/03) were used for technical purposes - for production of paints and varnishes. The most dynamic growth is registered for use of local sunflower oil for the local mayonnaise and margarine.

Total Industrial Use	**Canning, fish processing and confectionary industries**	**Mayonnaise and margarine production**	**Technical purposes**
MY 01/02 26,000 MT	9,000 MT	14,000 MT	1,000 MT
MY02/03 27,000 MT	8,000 MT	16,000 MT	3,000 MT

Prices

In MY01/02, Bulgarian oil prices increased significantly (ref: BU#2007). In March - August 2002, prices dropped due to mass less expensive imports of sunflower oil from Ukraine and imports of soybean oil and rapeseed oil from the EU.

Wholesale (WS), retail (RT) and export prices of Bulgarian sunflower oil in MY01/02, USD/MT

	2001				2002								Av.
Mo	09	10	11	12	1	2	3	4	5	6	7	8	
WS refi	**699**	**718**	**743**	**836**	**863**	**878**	**875**	**851**	**876**	**896**	**922**	**909**	**839**
RT refi lv/l	**1.83**	**1,9**	**1.9**	**2.1**	**2.2**	**2.3**	**2.3**	**2.2**	**2.2**	**2.2**	**2.1**	**2.1**	**2.1**
EXW crude	532	536	580	625	675	689	700	595	599	640	644	626	594
EXW refi	434	454	608	666	445	932	999	882	0	0	679	690	549
Source: MinAg Sunflower Bulletin, October 2002													

In **MY02/03, producer's** prices are expected to remain at higher levels due to higher local prices of sunflower seeds and the forecast to stable high international prices. Retail prices in MY02/03 are estimated at be stable at high levels due to higher farm-gate prices of oilseeds which increases the production cost of sunflower oil; and high international prices.

TRADE

General

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

Exports

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

In MY01/02, exports dropped by 36 percent to 17,000 MT (11,000 MT/$6.3 million crude and 6,300 MT/$3.7 million refined oil) compared, due to local shortage of seeds, higher local oil prices and its relatively low competitiveness on the export markets. Major export destinations were the Netherlands (5,000 MT) and Macedonia (3,500 MT) for refined oil; and Macedonia (2,000 MT) and Albania (1,400 MT) for crude oil. Average export price for refined oil was $586/MT and for the crude oil $584/MT.

In MY02/03, exports are estimated at 19,000 MT of which 15,000 MT crude oil and 4,000 MT refined oil. Bulgarian sun oil exports should allow a similar pattern in MY03/04 (18,000 MT forecast) to previous year as supply and demand remain stable.

For the period October - December 2002 (MY02/03), sunflower oil exports totaled 14,000 MT of which 1,933 MT refined oil and 11,808 MT crude oil. Major export destinations for the refined oil were Albania (1,376 MT) and Yugoslavia (360 MT); and for the crude oil destinations were Algeria (6,115 MT), Macedonia (2,882 MT) and Yugoslavia (1,629 MT). Average export price for this period for refined oil was $640/MT and for crude oil $536/MT.

Export terms:

In 1999 - 2003, Bulgaria exported sunflower oil to EU, (above the quota), EFTA, and Macedonia at general import duties for third countries.

The EU granted Bulgaria a duty free import quota for refined sunflower oil for 460 MT (July 1, 1998-June 30, 1999); 480 MT (July 1,1999- June 30, 2000) and 500 MT (after July 1, 2000) and 500 MT (July 1, 2001 to June 30, 2002). **Bulgarian exports for this period (July 1, 2001 to June 30, 2002) were significantly higher, 5,800 MT due to the shortage in the EU countries. Official information about the quotas 2002-2003 is not available yet.** In general, Bulgaria rarely exports refined sunflower oil to the EU market due to its lower quality.

Bulgaria can export sunflower oil to Turkey within a quota of 15,000 MT for crude oil in the period January 1 - August 31 annually at a 50 percent reduction from the general duty which is 18.8 percent. In 2001, Bulgarian exports to Turkey were 2,487 MT in crude oils and 103 MT in refined oils. **In 2002, these exports to Turkey were only 93 MT.**

Bulgarian sunflower oil exports to CEFTA are levied at general import duties for third countries. Hungary has allowed import quotas for Bulgarian oil of 500 MT at 8 percent import duty. In 2001 and in 2002, Bulgaria did not export any sun oil under this quota.

Export prices in MY01/02, average EXW(ex-work) of crude sunflower oil was $594/MT (for 3,300 MT). The largest single export shipment in MY01/02 was made in August 2002, 5,000 MT at $575/MT FOB destined for Holland. The average export prices are higher than the average export price for the EU ($581/MT) which indicates the local processing efficiency. The EU crushers are buying more expensive sunflower seeds, but they are much more efficient and can compete successfully with Bulgarian crushing industry by not only higher quality but also lower prices. According to industry sources, Bulgarian crushers on average have twice to five-fold higher production costs compared to the average in the EU.

Imports

In MY01/02, import of various vegetable oils increased due to local shortages. However, sunflower oil imports were small due to high regional and world prices.

Imports of sunflower oil were only 11,273 MT (see table below and GAIN trade matrixes) of which 9,752 MT crude oil and 1,521 MT refined oil. Major suppliers of crude oil were Ukraine (7,980 MT) and Moldova (1,219 MT). Average import price for crude oil was $453/MT. Refined oil was imported from Turkey (812 MT) and Argentina (152 MT); the average import price was $593/MT.

The most significant MY01/02 imports were soybean oil, 31 percent of total imports or 22,000 MT/$12.0 million, mainly due to its competitive prices. **Major suppliers of this oil were** Greece and Yugoslavia. **The United States exported record high quantity to Bulgaria, 2,573 MT/1.0 million and ranked as a third largest suppliers**. However, according to American Soybean Association, soybean oil imported from Greece and Israel is also from U.S. soybeans crushed at these markets, so total U.S. origin product can be estimates at much higher level, close to 13,000 MT.

Imports of vegetable oils in MY00/01 and MY01/02, MT						
Type	**Soya**	**Palm**	**Rapeseed**	**Cotton**	**Sunflower**	**Total**
crude	**12,313**	**766**	**2,563**	**695**	**9,754**	**26,111**
refined	**9,312**	**15,450**	**15,636**	**530**	**1,521**	**42,448**
MY01/02	**21,625**	**16,215**	**18,219**	**1,225**	**11,275**	**68,559**
MY00/01	**6,368**	**8,826**	**422**	**1,502**	**6,498**	**23,615**
Change, %	**240%**	**84%**	**4222%**	**-18%**	**74%**	**290%**
Source: MinAg Bulletin, Situation and Outlook for Sunflower, October 2002						

Import CIF prices in MY01/02 were as follows (according to Customs declarations):

-crude sunflower oil - 8,175 MT at $449/MT;
-crude soybean oil - 6,836 MT at $438/MT;
-refined rapeseed oil - 9,803 MT at $445/MT;

In MY02/03, imports of vegetable oils are expected to drop to 28,000 MT of which 5,000 MT crude sunflower oil; 1,400 MT refined sunflower oil and 22,000 MT of other vegetable oils. It is estimated that out of the 22,000 MT, 12,000 MT will be palm, cotton, rapeseed etc. oil and 10,000 MT will be soybean oil. For this reason, the sunflower oil PSD table figures indicate imports of sunflower and "other vegetable oils" which are estimated at 18,000 MT.

For the period October - December 2002, Bulgaria imported 1,984 MT of soybean oil from Yugoslavia (1,219 MT) and Greece (765 MT). The forecast for MY03/04 is for the same amount of imports with the stabilization of soybean oil imports at 10,000 MT - 11,000 MT.

Import duties:

HS# Product	CY2003 general import duties	EU import duties in CY2003
HS#1507 10 Crude and refined soy oil for food purposes	2.3% (0% in CY02)	0%
HS#1507 10 Crude and refined soy oil for non food purposes	6.4 % (6.5% in CY02)	0%
HS#1512 11 Crude sunflower oil	10 % general duty, 10 % preferential duty	0%
HS#1512 19 Refined oil and for technical purposes	15% general duty, 15% preferential duty	0%
HS#1511 10 Crude Palm Oil	3.8%	0%
HS#1511 90 In firm forms	10.9% -12.8%	0%
HS#1514 11 Crude Rapeseed oil	6.4%	0%
HS#1514 19 Rapeseed oil for technical purposes	7%	0%

The duties of rapeseed oil (crude and refined) in CY2003 were 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 showed 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 versus 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 were also increased from the zero duty in 2002 to 2.5-3.5 percent in 2003. The conventional (WTO) rates are between 10 and 40 percent. The Ministry of Finance wanted 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.

In 2002, the GOB introduced duty free imports with no quantitative limitations for crude sunflower oil in the period January 1 - July 31, 2002; and a duty free import quota of 5,000 MT for refined sunflower oil in the period June 1 - August 30, 2002. There are no preferences for imports in 2003 due to sufficient local crop.

In 2000 - 2003, Bulgaria permitted imports of sunflower oil from CEFTA countries at general duties for third countries. This includes the Czech Republic, Poland, Slovenia, Slovakia (and Croatia in 2002). Hungary had an import quota of 500 MT at 7 percent import duty for crude oil and 10 percent for refined oil. Romania had an import quota of 450 MT at 5 percent import duty for crude oil and 7 percent for refined oil. Imports from those countries above the quotas are imposed general import duties.

Turkey had an import quota of 500 MT for refined sunflower oil at 10.5 percent import duty. In CY2001, Turkey exported 1,080 MT of refined sun oil to Bulgaria and in CY2002, export to Bulgaria were 812 MT of Turkish refined sunflower oil is exported to Bulgaria at general import duties.

Table # 1. Average Oilseed Farm gate Prices, 2000 - 2002 in Bleva per metric ton

Table #1. Average Oilseed Farm gate Prices 2000 - 2002 in Bleva per metric ton			
	MY2000/2001	MY2001/02	MY2002/2003
Sunflower	301	403	361 - 420
Soybean	550	500	440
USD/Bleva Exchange Rate, average	2.12	2.20	1.85

Table #2. Sunflower Refined Oil Commodity Exchange Spot Prices in 2000-2002, US$/MT

Table #7. Sunflower Refined Oil Commodity Exchange Spot Prices in 2000-2002, US$/MT			
Commodity type	December 2000	December 2001	December 2002
In Bulk	594	836	860
Bottled	770	1,000	1,050
Refined for Exports, EXW	391	722	594

Table #7. MY01/02 Imports of soybean oil

Imports of Soybean Oil in CY2001 and CY2002 in MT			
CY2001		**CY2002**	
Greece	4,237	Greece	6,623
Yugoslavia	3,261	Yugoslavia	3,721
Israel	1,793	Germany	3,063
United States	1,097	United States	1,499
Argentina	674	Holland	1,231
Germany	448	Argentina	669
Total	11,667/$5.2 million	Total	16,986/$8.3 million

PSD Table, Soybeans

PSD Table						
Country	Bulgaria					
Commodity	Oilseed, Soybean (Local)				(1000 HA)(1000 MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		01/2001		01/2001		01/2001
Area Planted	0	1	0	3	0	3
Area Harvested	0	1	0	3	0	3
Beginning Stocks	0	0	0	0	0	0
Production	0	1	0	4	0	4
MY Imports	0	16	0	0	0	0
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	0	17	0	4	0	4
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Crush Dom. Consumption	0	17	0	4	0	4
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	0	0	0	0	0	0
TOTAL Dom. Consumption	0	17	0	4	0	4
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	17	0	4	0	4
Calendar Year Imports	0	0	0	0	0	0
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix, Soybeans

Import Trade Matrix			
Country	Bulgaria		
Commodity	Oilseed, Soybean (Local)		
Time period	MY2001	Units:	metric tons
Imports for:			1
U.S.	12,016	U.S.	
Others		Others	
Turkey	3,606		
China	372		
Greece	158		
Canada	20		
Belgium	5		
Total for Others	4161		0
Others not Listed	1		
Grand Total	16178		0

PSD, Soybean Meal

PSD Table						
Country	Bulgaria					
Commodity	Meal, Soybean (Local)				(1000 MT)(PERCENT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		01/2001		01/2002		01/2003
Crush	0	17	0	4	0	4
Extr. Rate, 999.9999	ERR	0.882353	ERR	0.75	ERR	0.75
Beginning Stocks	0	0	0	2	0	3
Production	0	15	0	3	0	3
MY Imports	0	63	0	82	0	80
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	0	78	0	87	0	86
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	73	0	80	0	80
Food Use Dom. Consump.	0	2	0	2	0	2
Feed Waste Dom. Consum	0	1	0	2	0	2
TOTAL Dom. Consumption	0	76	0	84	0	84
Ending Stocks	0	2	0	3	0	2
TOTAL DISTRIBUTION	0	78	0	87	0	86
Calendar Year Imports	0	0	0	0	0	0
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Imports Trade Matrix, Soybean meal

Import Trade Matrix			
Country	Bulgaria		
Commodity	Meal, Soybean (Local)		
Time period	2002	Units:	2001
Imports for:	metric tons		1
U.S.	3,000	U.S.	6,452
Others		Others	
Argentina	36,494	Argentina	23,348
Brazil	35,818	Brazil	20,437
Greece	2,718	Greece	6,971
Romania	2,100	Croatia	2,675
France	1,902	Azerbaijan	1,800
Hungary	20	Italy	724
Germany	16	Hungary	100
China	7		
Belgium	5		
Turkey	1		
Total for Others	79081		56055
Others not Listed			50
Grand Total	82081		62557

PSD Table, Soybean Oil

PSD Table						
Country	Bulgaria					
Commodity	Oil, Soybean (Local)				(1000 MT)(PERCENT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		01/2001		01/2001		01/2001
Crush	0	17	0	4	0	4
Extr. Rate, 999.9999	ERR	0.176471	ERR	0	ERR	0
Beginning Stocks	0	0	0	3	0	2
Production	0	3	0	0	0	0
MY Imports	0	22	10	10	10	11
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	0	25	10	13	10	13
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	5	5	5	5	5
Food Use Dom. Consump.	0	17	5	5	5	6
Feed Waste Dom. Consum	0	0	0	1	0	1
TOTAL Dom. Consumption	0	22	10	11	10	12
Ending Stocks	0	3	0	2	0	1
TOTAL DISTRIBUTION	0	25	10	13	10	13
Calendar Year Imports	0	0	0	0	0	0
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix, Soybean Oil

Import Trade Matrix			
Country	Bulgaria		
Commodity	Oil, Soybean (Local)		
Time period	MY01/02	Units:	metric tons
Imports for:			1
U.S.	2,573	U.S.	
Others		Others	
Greece	8,131		
Israel	1,793		
Yugoslavia	3,639		
Argentina	1,329		
Holland	1,231		
Germany	3,282		
Total for Others	19405		0
Others not Listed	266		
Grand Total	22244		0

PSD Table, Sunflower Seeds

PSD Table						
Country	Bulgaria					
Commodity	Oilseed, Sunflowerseed				(1000 HA)(1000 MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		10/2001		10/2002		10/2003
Area Planted	455	398	400	477	0	600
Area Harvested	398	389	400	467	0	560
Beginning Stocks	10	6	5	6	2	6
Production	392	392	500	571	0	680
MY Imports	15	9	3	7	0	3
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	417	407	508	584	2	689
MY Exports	75	140	165	180	0	253
MY Exp. to the EC	0	0	0	0	0	0
Crush Dom. Consumption	327	230	326	365	0	365
Food Use Dom. Consump.	5	26	10	27	0	30
Feed,Seed,Waste Dm.Cn.	5	5	5	6	0	6
TOTAL Dom. Consumption	337	261	341	398	0	401
Ending Stocks	5	6	2	6	0	35
TOTAL DISTRIBUTION	417	407	508	584	0	689
Calendar Year Imports	0	0	0	0	0	0
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix, Sunflower Seeds

Import Trade Matrix			
Country	Bulgaria		
Commodity	Oilseed, Sunflowerseed		
Time period	MY01/02	Units:	MY00/01
Imports for:	metric tons		1
U.S.	121	U.S.	24
Others		Others	
Moldova	3,843	Moldova	1,066
Romania	2,467		
Turkey	1,426	Turkey	153
Greece	369		
Ukraine	117	Ukraine	1,000
France	149		
Hungary	37		
Canada	48	Austria	68
China	26	China	12
Yugoslavia	20	Yugoslavia	394
Total for Others	8502		2693
Others not Listed	122		
Grand Total	8745		2717

Export Trade Matrix, Sunflower Seeds

Export Trade Matrix			
Country	Bulgaria		
Commodity	Oilseed, Sunflowerseed		
Time period	MY01/02	Units:	MY00/01
Exports for:	metric tons		1
U.S.	61	U.S.	
Others		Others	
Turkey	65,719	Turkey	26,607
Spain	22,989	Syria	4,184
Portugal	5,354	Greece	4,966
Syria	4,103	Germany	2,297
Germany	15,427	Holland	716
Greece	1,333	Hungary	967
Poland	710		
Austria	11,982		
Finland	6,450		
Denmark	2,928		
Total for Others	136995		39737
Others not Listed	2000		20367
Grand Total	139056		60104

PSD Table, Sunflower Meal

PSD Table						
Country	Bulgaria					
Commodity	Meal, Sunflowerseed				(1000 MT)(PERCENT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		10/2001		10/2002		10/2003
Crush	327	230	326	365	0	365
Extr. Rate, 999.9999	0.452599	0.382609	0.444785	0.380822	ERR	0.380822
Beginning Stocks	0	17	0	0	0	3
Production	148	88	145	139	0	139
MY Imports	0	0	0	0	0	0
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	148	105	145	139	0	142
MY Exports	20	17	20	20	0	20
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	128	88	125	116	0	119
TOTAL Dom. Consumption	128	88	125	116	0	119
Ending Stocks	0	0	0	3	0	3
TOTAL DISTRIBUTION	148	105	145	139	0	142
Calendar Year Imports	0	0	0	0	0	0
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Export Trade Matrix, Sunflower Meal

Export Trade Matrix			
Country	Bulgaria		
Commodity	Meal, Sunflowerseed		
Time period	MY01/02	Units:	metric tons
Exports for:			1
U.S.		U.S.	
Others		Others	
Turkey	10,129		
Macedonia	3,630		
Greece	3,192		
Bosnia and Herzegovina	23		
Poland	20		
Total for Others	16994		0
Others not Listed			
Grand Total	16994		0

PSD Table, Sunflower Oil

PSD Table						
Country	Bulgaria					
Commodity	Oil, Sunflowerseed				(1000 MT)(PERCENT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		10/2001		10/2002		10/2003
Crush	327	230	326	365	0	365
Extr. Rate, 999.9999	0.382263	0.330435	0.383436	0.339726	ERR	0.339726
Beginning Stocks	10	3	2	2	1	2
Production	125	76	125	124	0	124
MY Imports	10	47	19	18	0	18
MY Imp. from U.S.	0	0	0	0	0	0
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	145	126	146	144	1	144
MY Exports	10	17	10	19	0	18
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	40	21	40	22	0	22
Food Use Dom. Consump.	89	85	91	100	0	102
Feed Waste Dom. Consum	4	1	4	1	0	1
TOTAL Dom. Consumption	133	107	135	123	0	125
Ending Stocks	2	2	1	2	0	1
TOTAL DISTRIBUTION	145	126	146	144	0	144
Calendar Year Imports	0	0	0	0	0	0
Calendar Yr Imp. U.S.	0	0	0	0	0	0
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix, Sunflower Oil

Import Trade Matrix			
Country	Bulgaria		
Commodity	Oil, Sunflowerseed		
Time period	MY01/02	Units:	MY00/01
Imports for:	metric tons		1
U.S.		U.S.	
Others		Others	
Ukraine	7,980	Ukraine	3,938
Moldova	1,219	Moldova	765
Greece	355	Romania	200
Romania	255	Greece	24
Turkey	812	Turkey	1,141
Argentina	152	Argentina	84
Italy	58	Italy	56
Yugoslavia	54	France	6
Total for Others	10885		6214
Others not Listed	388		284
Grand Total	11273		6498

Export Trade Matrix, Sunflower Oil

Export Trade Matrix			
Country	Bulgaria		
Commodity	Oil, Sunflowerseed		
Time period	MY01/02	Units:	MY00/01
Exports for:	metric tons		1
U.S.	30	U.S.	80
Others		Others	
Holland	5,023		
Macedonia	5,536	Macedonia	7,776
Turkey	2,630	Turkey	1,174
France	165	Greece	2,411
Yugoslavia	1127	Egypt	1,188
Albania	1,380	Georgia	990
Russia	197	Albania	6,634
Greece	123	Yugoslavia	5,829
Israel	118	Israel	103
Total for Others	16299		26105
Others not Listed	767		171
Grand Total	17096		26356