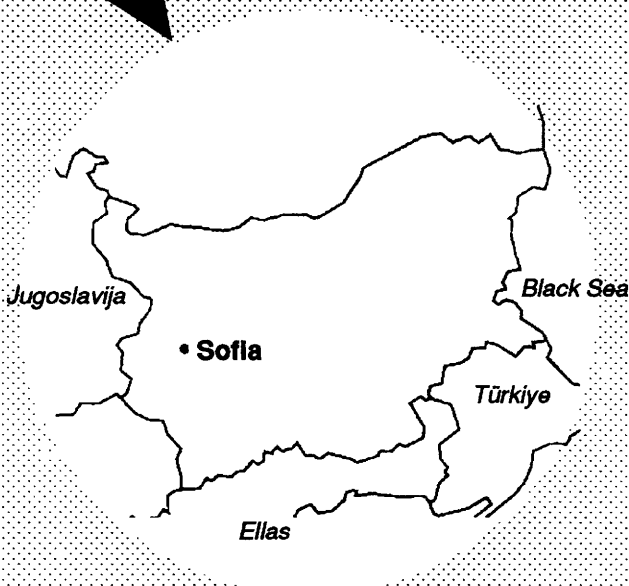


# Agricultural Situation and Prospects in the Central and Eastern European Countries



## Bulgaria

VOL II  
ANNEXES





**European Commission**  
**Directorate General for Agriculture (DG VI)**  
**Working Document**

**Agricultural situation and prospects in the**  
**Central and Eastern European Countries**

<b>BULGARIA</b>
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**VOL. II**

**ANNEXES**

This report has been prepared by DG VI in close collaboration with Dr Sophia Davidova from University of London, Wye College, Kent, and Dr Svetla Batchvarova from AMIS (Agricultural Market Information System), Sofia, and with the advice and contributions of Professor Alain Pouliquen, Directeur de Recherche at INRA (Institut National de la Recherche Agricole), Montpellier. Assistance was given by DG IA and DG II.

The manuscript has been prepared by H. C. Beaumont and Manuel R. Gavira Montiel. The authors accept full responsibility for any errors which could still remain in the text. The manuscript was concluded on 30th of June 1995.

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## Annex 1

### PHARE Assistance to Bulgaria's Agriculture

#### 1. General Framework and Background

Between 1990 and 1993, PHARE Assistance has provided an amount of 51 Mio ECUs for Bulgarian agriculture out of 415.9 Mio ECUs of total Phare commitments for agriculture in the CEECs. In 1993 and 1994, no agricultural tranche has been set up in Phare assistance for Bulgaria (out of a total amount of 90 Mio ECUs this year).

Within Bulgaria, the **Ministry of Foreign Economic Relations** was the responsible authority for the realisation of the 1991 Phare Assistance Programme, and so was the **Ministry of Agricultural Development, Land Use and Land Restitution** for the 1992 Programme.

#### Phare agricultural commitments for Bulgaria (Mio ECUs)

1990	1991	1992	1993	1994
16	25	10	0	0

#### 2. Specific Actions

The 1990 so called "**Development of Private Agriculture**" Phare Programme for Bulgarian Agriculture was essentially supply oriented, and catered for :

- the supply of agricultural inputs to private farmers (animal feed, seeds, crop protection chemicals, animal health products) and imported by an agricultural private bank (14.5 Mio ECUs);
- the provision of technical assistance to the restructuring of the agricultural bank and to the Ministry of Agriculture ;
- the implementation of a Project Management Unit and of proper monitoring of the programme.

The 1991 programme ("**Restructuring of the Agricultural Sector**", with a 25 Mio ECUs total amount) differed from the 1990 supply of equipment approach, to one with an increased provision of technical assistance. This programme had various aims :

- to contribute to the Land Reform and to create a Land Register (5 Mio ECUs),
- to redevelop a statistical service to assist policy making ; creation of a policy analysis unit (4 Mio ECUs)
- to provide reviews, evaluations, and auditing for the agro-processing industries,

- to improve market information requirements for agricultural products (2 Mio ECUs),
- to provide assistance in banking techniques (1.5 Mio ECUs),
- to support the transformation of agriculture in certain areas by agro processing and farm enterprise analysis and planning services (4.5 Mio ECUs),
- to establish a credit line to allow emerging private farms and agroindustry (7 Mio ECUs),
- and to increase the support for the existing Project Management Unit set up by the 1990 programme for reform in Bulgarian Agriculture and for the development of private farming (1 Mio ECUs).

The 1992 so called **"Restructuring and Development of Agriculture"** programme had to continue to assist Bulgaria in the transformation, privatisation, and rebuilding of the agricultural sector by :

- restoring property rights by accelerating land restitution and land registration (3.1 Mio ECUs) ;
- assisting in the privatisation of the remaining state-owned agricultural enterprises (1.9 Mio ECUs);
- promoting the development of private wholesale and auction market networks for agricultural products (2.2 Mio ECUs) ;
- promoting media coverage for the clarification of agricultural strategies (public relation campaigns) (1 Mio ECUs) ;
- building flexibility into the programme by incorporating a provision for general technical assistance to address other urgent issues arising during its implementation (1 Mio ECUs) ;
- continuation of the Project Management Unit (0.8 Mio ECUs).

## ANNEX II

**UTILIZATION OF THE ASSOCIATION AGREEMENT QUOTAS**

PRODUCT (tonnes)	Quota available	Quota utilized	% of utilization
<b>01.07.94-30.06.95</b>			
<b>CEREALS</b>			
Common wheat	2211	1900	85.9
Millet	1395	0	0.0
<b>Total cereals</b>	<b>3606</b>	<b>1900</b>	<b>52.7</b>
<b>DAIRY PRODUCTS</b>			
<b>Cheeses</b>	<b>2233.3</b>	<b>460</b>	<b>20.60</b>
<b>POULTRY &amp; EGGS</b>			
Duck meat	142.5	97.5	68.42
Chicken meat, carcass	1573.6	0	0.00
Goose meat	569.5	319.12	56.04
<b>Total Poultry meat</b>	<b>2285.6</b>	<b>416.62</b>	<b>18.23</b>
<b>Whole eggs</b>	<b>290.8</b>	<b>15.8</b>	<b>5.43</b>
<b>BEEF</b>			
<b>Beef</b>	<b>187.2</b>	<b>0</b>	<b>0.00</b>
<b>1994</b>			
<b>PIG MEAT</b>			
<b>Meat of swine fresh, chilled, frozen</b>	<b>185</b>	<b>0</b>	<b>0.00</b>
<b>SHEEP &amp; GOATS</b>			
Live animals	2500	2430	97.20
Meat	1562.5	1324	84.74
<b>Total sheep and Goats</b>	<b>4062.5</b>	<b>3754</b>	<b>92.41</b>
<b>31.12.93-30.06.94</b>			
<b>MAIN FRUIT &amp; VEGETABLES</b>			
Potatoes : 07019051	984.9	16.97	1.72
Processed tomatoes: 20021010	3432.8	993.395	28.94
Cucumbers : 07070011	346.7	319.3	92.10
Plums : 08094011	2346.6	0	0.00
Strawberries : 08101010	839.3	0	0.00
Apple juice : 20097019	1552.7	0	0.00

Source : European Commission

For cereals, dairy products, poultry & eggs, beef and pig meat, the quota utilized refers to the quantities for which import certificates were requested.

For sheep & goats, fruit & vegetables, goose meat, the quota utilized refers to actual utilization.

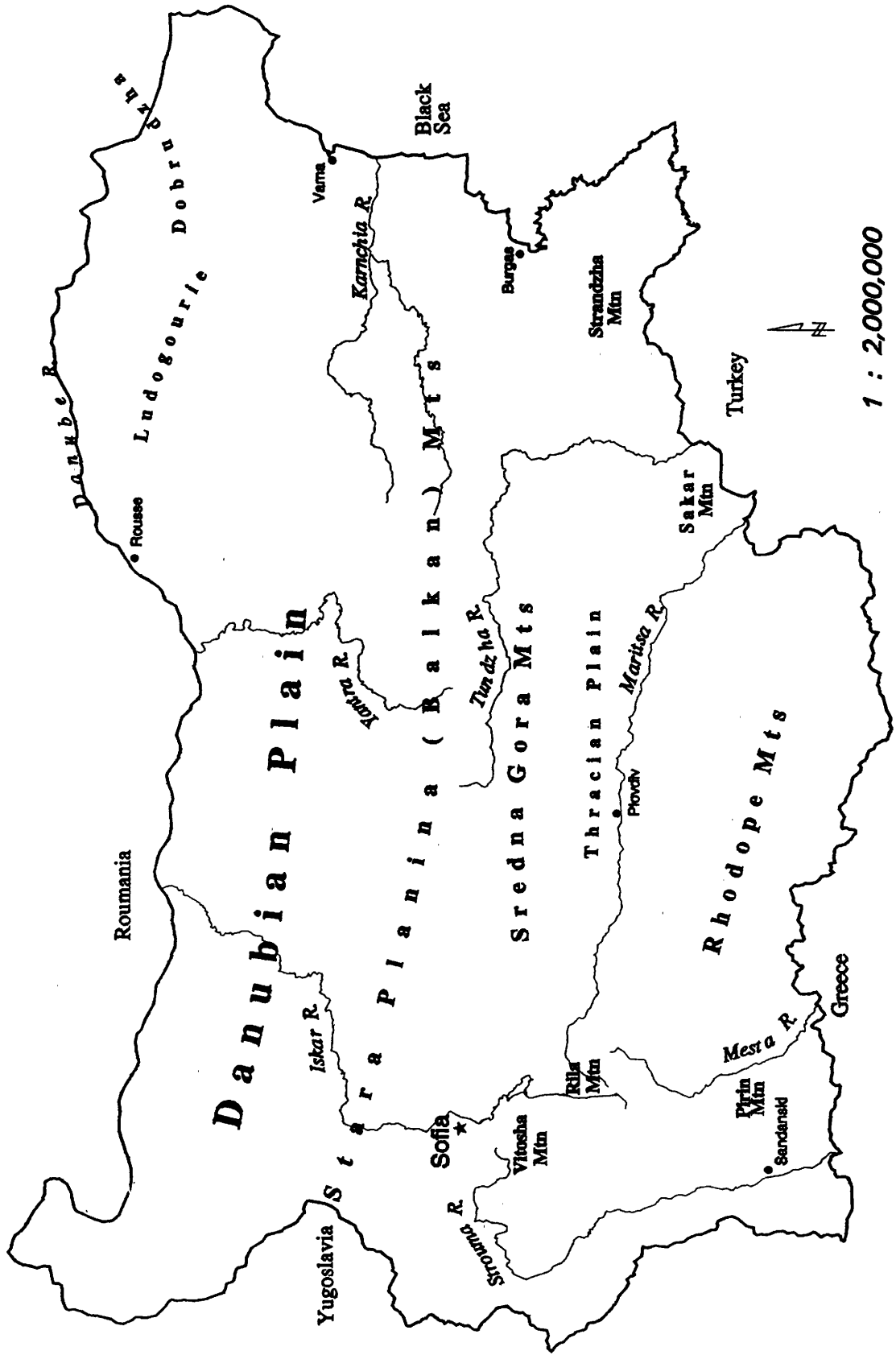




# **ANNEX III**

## **Statistics**





## ANNEX 1.2

POPULATION GROWTH AND DENSITY ('000)	1980	1985	1989	1990	1991	1992 a/	1993b/	1994b/
Population	8862.0	8950.0		8989.0	8590.0	8485.0	8460.0	8450.0
-male	4416.0	4442.0		4434.0		4168.0		
-female	4446.0	4508.0		4555.0		4317.0		
Density c/	80.0	80.6		82.4		76.4		

URBAN AND RURAL POPULATION ('000)	1980	1985	1989	1990	1991	1992 a/	1993	1994
Urban	5533.0	5808.0		6114.0		5705.0		
%	62%	65%		68%		67%		
Rural	3329.0	3142.0		2875.0		2780.0		
%	38%	35%		32%		33%		
TOTAL	8862.0	8950.0		8989.0		8485.0		

POPULATION ON WORKING AGE ('000)	1980	1985	1989	1990	1991	1992 a/	1993	1994
Total	5088.0		4852.0	4806.0	4781.0	4729.0		
-urban	3415.0					3401.0		
-rural	1673.0					1328.0		
Male	2704.0		2569.0	2542.0	2527.0	2494.0		
Female	2385.0		2283.0	2264.0	2254.0	2235.0		

EMPLOYMENT BY SECTOR ('000)	1980	1985	1989	1990	1991	1992 a/	1993	1994
Agriculture & forestry	941.0	895.0	814.0	758.0	696.0	694.0		
Industry	1412.0	1411.0	1646.0	1498.0	1230.0	1067.0		
Construction	354.0	361.0	361.0	337.0	253.0	204.0		
Transport & Communications	302.0	300.0	290.0	286.0	267.0	237.0		
Trade	357.0	355.0	395.0	372.0	342.0	329.0		
Others 1/	747.0	773.0	858.0	846.0	776.0	742.0		
TOTAL	4113.0	4095.0	4364.0	4097.0	3564.0	3273.0		

EMPLOYMENT BY SECTOR (% of total employment)	1986	1987	1989	1990	1991	1992 a/	1993	1994
Agriculture & forestry	19.9	19.1	18.7	18.5	19.5	21.2		
Services			19.1	19.9	21.0	21.8		
Industry d/			62.2	61.6	59.5	57.0		

a/ Last census

b/ estimates

c/ population per km<sup>2</sup>

d/ Including Transport, Communications, Construction & Trade

1/ Includes Services

Source: National Statistics

### ANNEX 1.3: Government's programme (1995-1998)

In May 1995 the Government's programme for the period 1995-1998 was officially published. The main objective set in the programme is to develop further the parliamentary democracy and the civil society in Bulgaria as well as a modern social market economy. Some of the specific objectives in different fields of the economy are:

- Macroeconomic. To combine the market forces with state regulation, rejecting both extreme options, central planning and pure monetarism. To continue a moderately restrictive macroeconomic policy in 1995-1996. Forecasted GDP growth rate for 1998 is around 5%, and inflation rate around 15%. The payments of external debt (total, including payments on loans received after 1991 from international financial institutions) in 1995 and 1996 will be about 1 bln USD per year, and in 1997 more than 1.3 bln USD.
- Social. To terminate the impoverishment of Bulgarian population. Switch in the tendency from a decrease in real incomes to an increase in 1996. Decrease in the rate of unemployment from 20.5% by the end 1994 to 12-14% in 1998.
- Investments. To enhance private investments by temporary profit tax relief, decreased import duties for investment goods etc.
- Privatisation. To speed up the privatisation by applying simultaneously commercial and mass privatisation. Subject to privatisation are all state owned enterprises with the exception of what is formulated in the programme as enterprises with strategic national importance. During the period 1995-1998 to put for privatisation over 2,000 enterprises or parts thereof with expectations that around 1,700 will be privatised. Thus according to the programme about 50% of the state-owned enterprises will be privatised by 1998.
- Agriculture. The main objective announced is to stop the decline, to reach revitalisation of the sector and to satisfy the main needs of the population of food products. In order to reach this objective the Government will support agriculture. State, co-operative and private sectors will be treated equally. With the amended land law the land reform is supposed to speed up and it is programmed that by the end of 1996 85-90% of the land will be restituted. During the transitional period the State will stabilise those agricultural structures that have crucial role for domestic agriculture and for competitiveness on the world market: the big livestock complexes and feed enterprises; the main agro-processing enterprises; machine-tractor stations; irrigation facilities; seed selection and producing enterprises; research and other service units. The support to agriculture and food industries is to be provided in the framework of the Law for protection of agricultural producers. There is not an emphasis on privatisation in the field of agriculture.

## ANNEX 2.1

### FARM STRUCTURE in 1934

Farm size in ha	Farms (000)	% total	% accum.	Area (000h)	% total	% accum.
up to 1	119.6	13.5		58.4	1.3	
1 - 5	439.5	49.7	63.2	1254.4	28.7	30.0
5 - 10	231.9	26.2	89.4	1607.2	36.8	66.8
10 - 20	80.9	9.2	98.6	1064.5	24.4	91.2
20 - 50	12.1	1.3	99.9	314.8	7.2	98.4
+ 50	0.6	0.06	100	69.1	1.8	100
<b>TOTAL</b>	<b>884.8</b>	<b>100</b>		<b>4368.4</b>	<b>100</b>	

Source: Census of agricultural farms (1934)

### FARM STRUCTURE in 1989

Farm size in ha	N° of farms	% of total	Area (in ha)	% of total
up to 1	1.600.000	99.98	635.000 a/	14
+ 10.000	300	0.02	3.941.000 b/	86
<b>TOTAL</b>	<b>1.600.300</b>	<b>100</b>	<b>4.576.000</b>	<b>100</b>

Source: Ministry of Agriculture and Food Industry (1990)

a/ area under private plots

b/ area under the agro-industrial complexes (APK)

## ANNEX 2.2 PRIVATE PRODUCTION

### Share of private farms in production of agricultural products (1989)

<i>CROP SECTORS</i>	<i>%</i>	<i>ANIMAL SECTOR</i>	
Wheat	2.2	Meat (carcass weigh)	48.3
Maize	44.2	Pork	44.8
Tomatoes	34.0	Poultry	58.3
Potatoes	53.6	Milk	24.2
Peppers	48.2	Eggs	48.5
Peaches	21.0	Honey	85.8
Cherries	60.6	Wool	31.5
Grapes	48.8		
Table grapes	60.2		
Plums	56.2		

Source: National Statistics Institute

### Size distribution of private farm (1994)

0.1 to 0.2	861 517
0.2 to 0.5	359 579
0.5 to 1.0	333 994
1.0 to 2.0	248 772
2.0 to 5.0	93 568
5.0 to 10.0	15 762
over 10.0	4 201

Source: OECD

### Size distribution of private farms in 1944-46

Farm size in ha	Number of farms	
	Number	%
up to 1	154400	14.0
1 - 4	460200	41.7
5 - 10	404000	36.6
11 - 20	75000	6.8
+ 20	10000	0.9
TOTAL	1103800	100

Source: National Statistical Institute

## ANNEX 2.3: LAND RESTITUTION

### Structure of claims for land restitution

Total number of land claimants	1.700.000 a/
Individuals	99.6%
Legal entities	0.4%
Area subject of claims	5.700.000 ha
Claimed by individuals	91.1%
Claimed by the State	1.4%
Claimed by municipalities	5.1%
Claimed by other legal entities b/	2.4%

Source: Mishev and Kopeva, 1993

a/ in 90% of the cases there are 2 or 3 heirs for each former landowner

b/ churches, monasteries, agricultural schools, etc.



## ANNEX 3.1

wheat balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
beg. stocks (000 t)									
area (000 ha)	1127	1085	1182	1138	1163	1200	1108	1266	1320
yield (t/ha)	3.84	3.82	4.01	4.77	4.55	3.75	3.11	2.91	2.95
production (000 t)	4327	4149	4743	5425	5292	4497	3443	3681	3894
imports (000 t)	235	410	486	243	121	289	6	30	0
exports (000 t)	300	272	372	483	452	112	225	44	15
end stocks (000 t)									
disappearance (000 t)	4262	4287	4858	5185	4961	4675	3225	3667	3879
-feed (000 t)	1653	1678	2231	2345	2197	2209	1668	1782	1526
p.c. disappear. (kg)	474.6	476.9	540.3	576.7	551.8	544.2	380.0	433.4	459.1

barley balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
beg. stocks (000 t)									
area (000 ha)	318	295	345	360	360	383	391	362	390
yield (t/ha)	3.60	3.70	3.81	4.37	3.85	3.92	3.06	2.58	3.06
production (000 t)	1144	1091	1313	1572	1387	1502	1195	933	1192
imports (000 t)	695	2	195	193	1	38	0	0	0
exports (000 t)	0	0	2	0	11	5	136	24	1
end stocks (000 t)									
disappearance (000 t)	1839	1093	1506	1765	1377	1535	1059	909	1191
-feed (000 t)	1243	1105	1216	1249	1205	1161	977	758	828
p.c. disappear. (kg)	204.8	121.6	167.5	196.4	153.1	178.7	124.8	107.5	141.0

maize balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
beg. stocks (000 t)									
area (000 ha)	574	497	490	563	424	560	619	528	493
yield (t/ha)	4.96	3.74	3.18	4.02	2.88	4.96	2.81	1.86	3.46
production (000 t)	2848	1858	1557	2265	1221	2775	1742	983	1707
imports (000 t)	546	584	573	1247	25	300	0	148	0
exports (000 t)	2	3	2	3	0	1	188	4	0
end stocks (000 t)									
disappearance (000 t)	3393	2439	2128	3509	1245	3074	1555	1127	1707
-feed (000 t)	2425	2349	1976	2241	1747	1671	1643	1197	1269
p.c. disappear. (kg)	377.8	271.3	236.7	390.3	138.5	357.8	183.2	133.2	202.1

## ANNEX 3.1

rye balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
beg. stocks (000 t)									
area (000 ha)	30	29	32	25	25	25	21	19.27	14.499
yield (t/ha)	1.73	1.69	1.91	2.08	1.96	1.84	1.67	1.30	1.69
production (000 t)	52	49	61	52	49	46	35	25	25
imports (000 t)	0	0	0	0	0	0	0	0	0
exports (000 t)	0	0	0	0	0	0	0	0	0
end stocks (000 t)									
disappearance (000 t)	52	49	61	52	49	46	35	25	25
-feed (000 t)	38	36	49	39	40	37	26	17	17
p.c. disappear. (kg)	5.8	5.5	6.8	5.8	5.5	5.4	4.1	3.0	2.9

oats balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
beg. stocks (000 t)									
area (000 ha)	28	28	27	38	35	36	43	52	53
yield (t/ha)	1.50	1.46	1.96	2.82	1.83	1.44	1.92	1.36	1.57
production (000 t)	42	41	53	107	64	52	82	70	83
imports (000 t)	1	1	1	0	0	0	0	0	0
exports (000 t)	0	0	0	0	0	0	0	0	0
end stocks (000 t)									
disappearance (000 t)	43	42	54	107	64	52	82	70	83
-feed (000 t)	36	36	46	79	76	43	55	77	71
p.c. disappear. (kg)	4.8	4.6	6.0	11.9	7.1	6.1	9.7	8.2	9.8

sorghum balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
beg. stocks (000 t)									
area (000 ha)	0	0	0	0	0	0	0	0	0
yield (t/ha)	0	0	0	0	0	0	0	0	0
production (000 t)	0	0	0	0	0	0	0	0	0
imports (000 t)	0	0	0	0	0	0	0	0	0
exports (000 t)	0	0	0	0	0	0	0	0	0
end stocks (000 t)									
disappearance (000 t)	0	0	0	0	0	0	0	0	0
-feed (000 t)	0	0	0	0	0	0	0	0	0
p.c. disappear. (kg)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

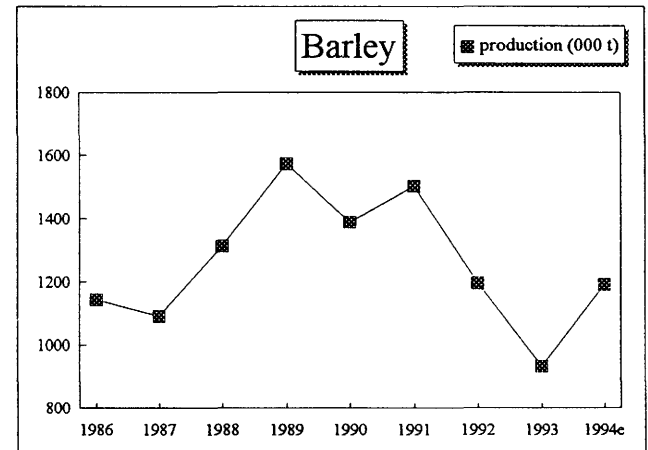
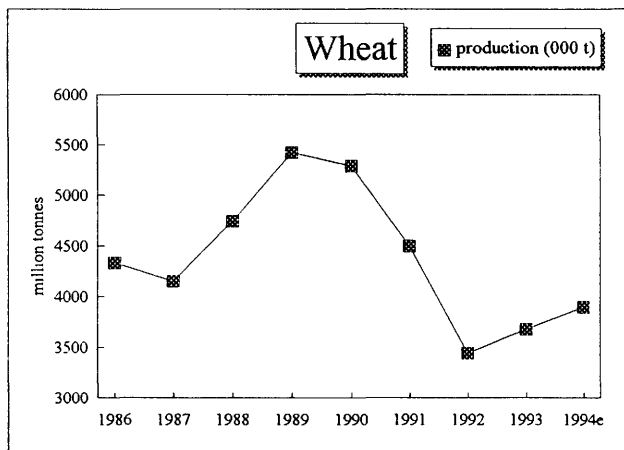
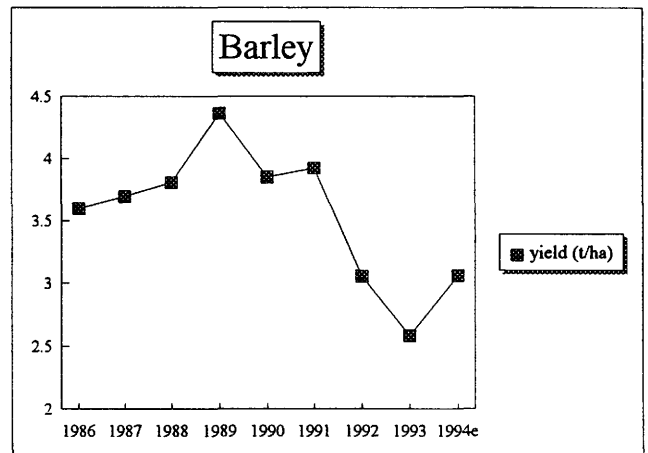
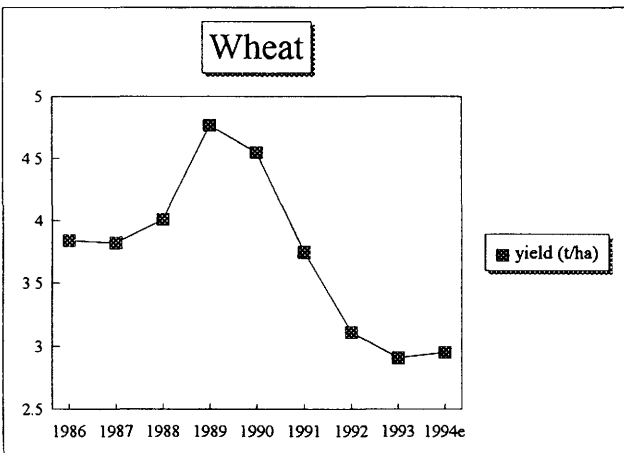
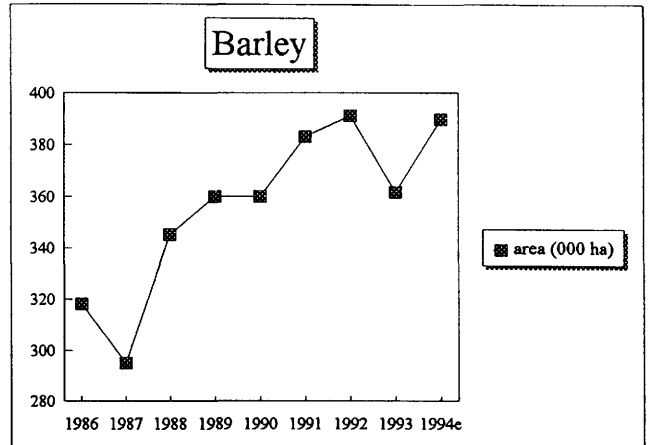
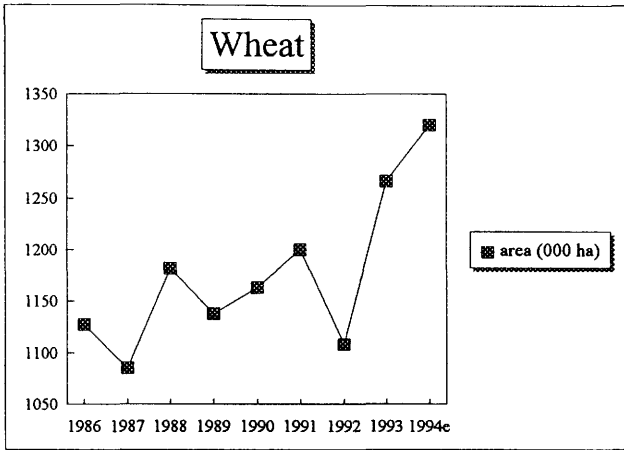
## ANNEX 3.1

millets balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
beg. stocks (000 t)									
area (000 ha)	0	0	0	0	0	0	0	0	0
yield (t/ha)	0	0	0	0	0	0	0	0	0
production (000 t)	0	0	0	0	0	0	0	0	0
imports (000 t)	0	0	0	0	0	0	0	0	0
exports (000 t)	0	0	0	0	0	0	0	0	0
end stocks (000 t)									
disappearance (000 t)	0	0	0	0	0	0	0	0	0
-feed (000 t)	0	0	0	0	0	0	0	0	0
p.c. disappear. (kg)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

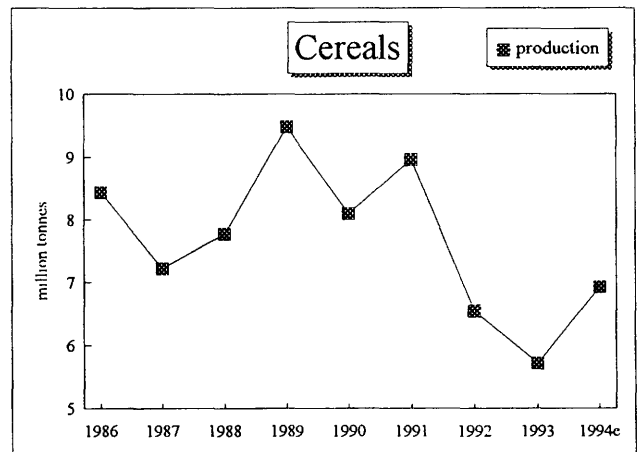
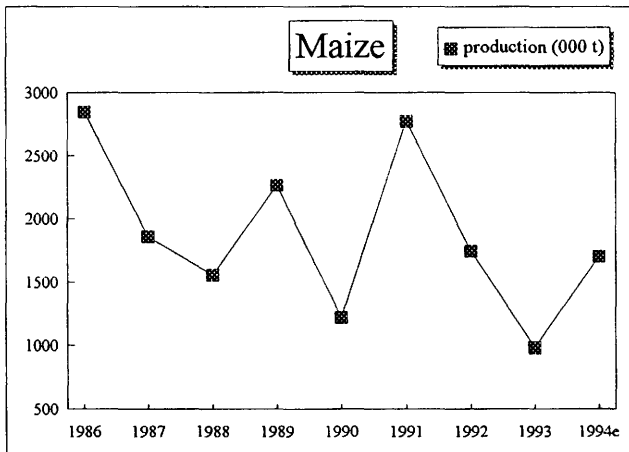
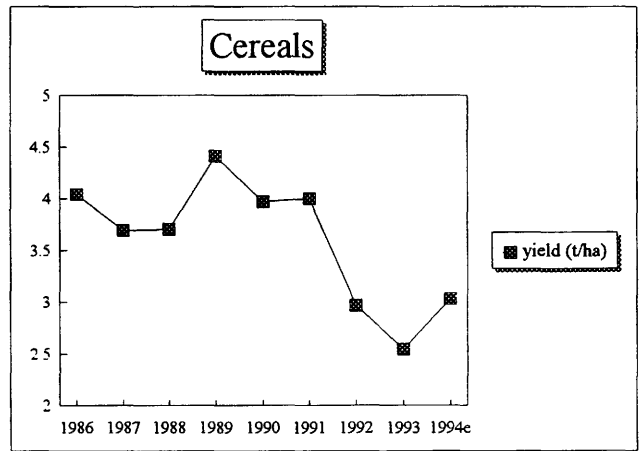
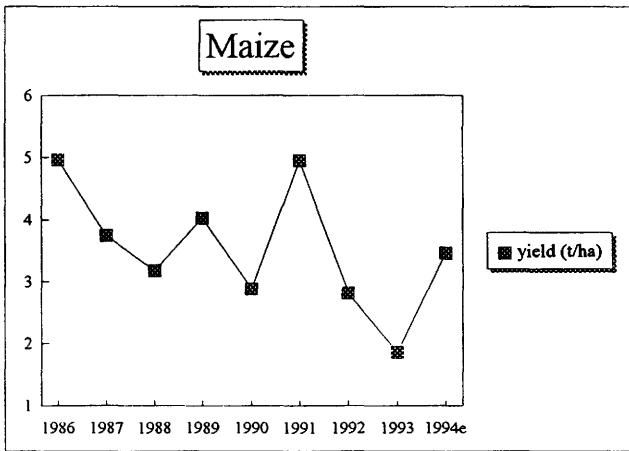
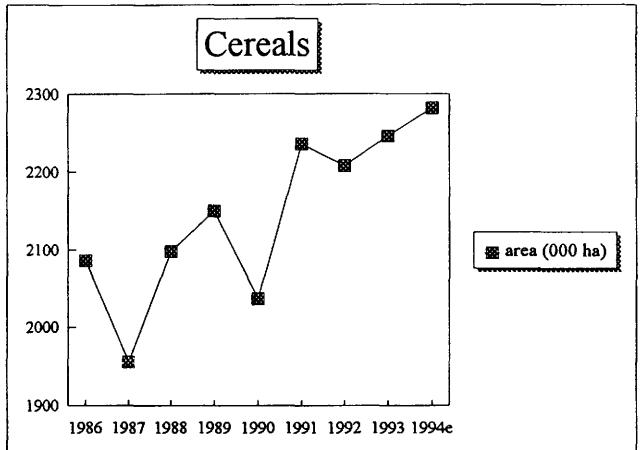
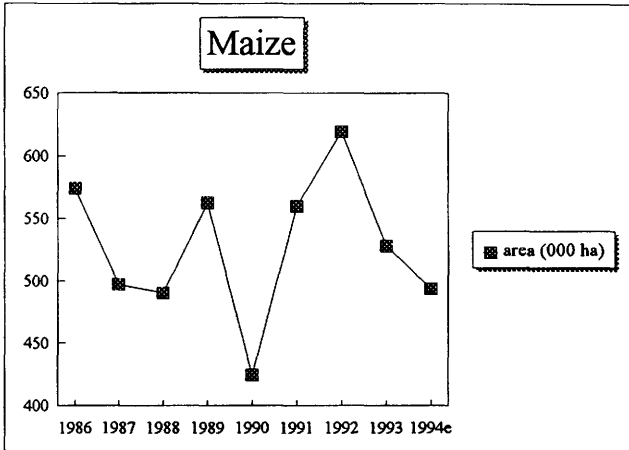
other cereals balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
beg. stocks (000 t)									
area (000 ha)	9	22	22	26	30	32	26	19	12
yield (t/ha)	2.00	1.68	2.14	2.42	2.53	2.56	1.87	1.36	1.45
production (000 t)	18	37	47	63	76	82	49	26	17
imports (000 t)	0	0	0	0	0	0	0	0	0
exports (000 t)	0	0	0	0	0	0	0	0	0
end stocks (000 t)									
disappearance (000 t)	18	37	47	63	76	82	49	26	17
-feed (000 t)	13	32	41	55	68	75	44	23	14
p.c. disappear. (kg)	2.0	4.1	5.2	7.0	8.5	9.5	5.7	3.1	2.0

total cereals balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
beg. stocks (000 t)									
area (000 ha)	2086	1956	2098	2150	2037	2236	2208	2246	2282
yield (t/ha)	4.04	3.69	3.71	4.41	3.97	4.00	2.96	2.55	3.03
production (000 t)	8431	7225	7774	9484	8089	8954	6546	5718	6919
imports (000 t)	1477	997	1254	1683	146	627	6	178	0
exports (000 t)	302	275	376	486	463	118	548	72	16
end stocks (000 t)									
disappearance (000 t)	9607	7947	8653	10681	7772	9463	6004	5823	6902
-feed (000 t)	5409	5236	5559	6008	5333	5196	4413	3854	3725
p.c. disappear. (kg)	1069.8	884.0	962.5	1188.1	864.5	1101.7	707.6	688.3	816.8

ANNEX 3.1



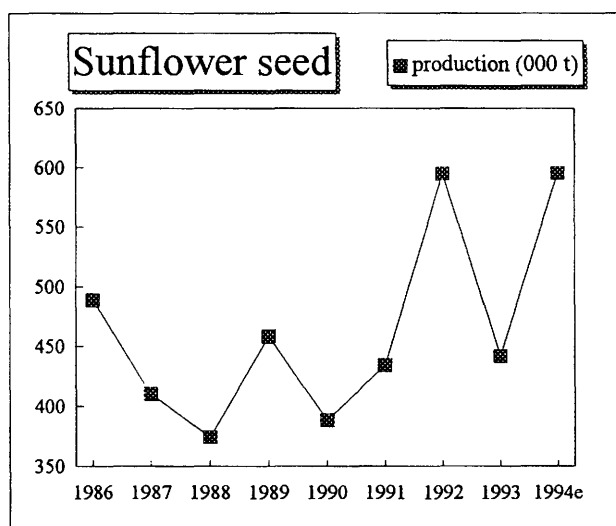
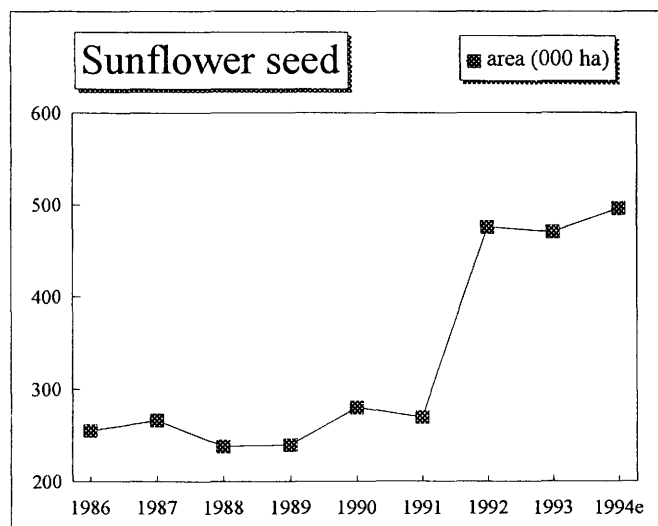
ANNEX 3.1



ANNEX 3.2

sunflower seed balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
beg. stocks (000 t)									
area (000 ha)	255	266	238	240	280	270	476	470	496
yield (t/ha)	1.92	1.54	1.57	1.91	1.39	1.61	1.25	0.94	1.20
production (000 t)	489	410	374	458	389	434	595	442	595
imports (000 t)	94	0	95	59	13	4	0	0	0
exports (000 t)	8	11	19	28	23	24	118	98	100
end stocks (000 t)									
disappearance (000 t)	575	399	451	489	378	414	477	344	495
-seed (000 t)	8	7	7	8	8	14	14	15	14
p.c. disappear. (kg)	64.1	44.4	50.2	54.4	42.0	48.2	56.2	40.7	58.6

soya beans balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
beg. stocks (000 t)									
area (000 ha)	51	36	24	21	17	11	21	21	9
yield (t/ha)	1.05	0.92	0.72	1.00	0.88	1.88	0.81	0.75	1.00
production (000 t)	54	33	17	22	15	20	17	16	9
imports (000 t)	47	115	95	37	23	0	0	0	0
exports (000 t)	0	0	0	6	2	2	0	0	0
end stocks (000 t)									
disappearance (000 t)	101	147	112	52	35	17	17	15	9
-seed (000 t)	2	1	1	1	1	1	1	1	0
p.c. disappear. (kg)	11.3	16.4	12.5	5.8	3.9	2.0	2.0	1.8	1.1



## ANNEX 3.3

sugar balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
<b>sugarbeet</b>									
area (000 ha)	42.9	40.7	40.7	40.5	36.5	37.7	17.5	10.2	8.1
yield (t/ha)	20.27	18.08	15.39	23.86	16.00	22.69	17.41	10.39	13.93
production (000 t)	870	736	626	966	584	856	304	106	112
processed (000 t)	854	723	585	912	547	820	268	77	122
<b>sugar (%)</b>									
yield (t/ha)	10%	15%	13%	8%	6%	8%	12%	12%	11%
production (000 t)	89	110	75	74	35	64	31	9	13
imports (000 t)	380	419	352	307	176	54	165	135	135
exports (000 t)	0	0	0	0	0	0	0	21	21
disappearance (000 t)	469	529	427	381	211	118	196	123	127
p.c. disappear. (kg)	52.2	58.9	47.4	42.4	23.4	13.8	23.0	14.6	15.1

## ANNEX 3.4

tobacco balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
beg. stocks (000 t)									
area (000 ha)	103	90	87	73	53	53	51	39	27
yield (t/ha)	1.22	1.47	1.33	1.11	1.45	1.36	1.29	1.17	1.19
production (000 t)	126	133	116	81	77	72	66	46	32
imports (000 t)	41	21	15	15	11	8	11	9	9
exports (000 t)	62	56	57	41	34	28	30	15	15
end stocks (000 t)									
disappearance (000 t)	106	98	74	55	54	53	47	40	26
p.c. disappear. (kg)	11.8	10.9	8.2	6.1	6.0	6.1	5.6	4.7	3.1

### ANNEX 3.5: Fruits

<b>Fruits</b>	<b>1989</b>	<b>1990</b>	<b>1991</b>	<b>1992</b>	<b>1993</b>	<b>1994</b>
<b>Area</b>						
Apples	24	23	22	21	19	16
Peaches	11	12	12	12	10	9
Plums	17	17	18	17	12	12
Cherry	11	11	12	11	10	9
Otherfruits	33	27	27	29	44	8
<b>Total Area</b>	<b>96</b>	<b>90</b>	<b>91</b>	<b>90</b>	<b>95</b>	<b>54</b>
<b>Production</b>						
Apples	457	411	145	221	110	76
Peaches	99	78	72	76	54	46
Plums	140	123	105	99	57	57
Cherry	83	71	54	66	32	40
Otherfruits	271	244	185	170	262	45
<b>Total Prod</b>	<b>1050</b>	<b>927</b>	<b>561</b>	<b>632</b>	<b>515</b>	<b>264</b>

### ANNEX 3.6: Vegetables

<b>Vegetables</b>	<b>1989</b>	<b>1990</b>	<b>1991</b>	<b>1992</b>	<b>1993</b>	<b>1994</b>
<b>Area</b>						
Tomatoes	29	26	23	17	17	23
Cucumbers	4	4	5	4	4	5
Pepper	18	17	20	17	14	18
Dry onions	12	10	9	15	8	11
Gr. Tomatoes	3	3	4	5	0	0
GR. Cucumb	2	2	3	4	0	0
Other veget	34	31	26	12	11	6
<b>Total area</b>	<b>102</b>	<b>93</b>	<b>90</b>	<b>74</b>	<b>54</b>	<b>63</b>
<b>Production</b>						
Tomatoes	873	813	610	408	325	426
Cucumbers	128	108	115	71	62	58
Pepper	204	227	236	211	160	204
Dry onions	110	76	69	104	52	81
Gr. Tomatoes	34	33	36	30	24	11
GR. Cucumb	41	41	37	46	42	33
Other veget	272	267	244	205	196	204
<b>Total prod</b>	<b>1662</b>	<b>1565</b>	<b>1347</b>	<b>1075</b>	<b>861</b>	<b>1017</b>



## ANNEX 3.7

potatoes balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
beg. stocks (000 t)									
area (000 ha)	40	37	37	40	41	43	48	40	47
yield (t/ha)	12.44	8.64	9.79	13.76	10.50	11.70	11.83	9.04	10.07
production (000 t)	491	316	358	553	433	498	566	358	476
imports (000 t)	38	48	95	52	5	1	0	29	29
exports (000 t)	6	1	0	9	8	4	19	9	4
end stocks (000 t)									
disappearance (000 t)	523	362	453	597	430	495	547	378	502
-feed (000 t)	82	45	90	113	115	131	129	103	153
p.c. utilization (kg)	58.3	40.3	50.4	66.4	47.8	57.6	64.5	44.7	59.4

## ANNEX 3.8

grapes and wine balance sheet						
	Aver. 81-85	Aver. 86-90	1991	1992	1993	1994e
beg. stocks (000 t)						
area (000 ha)	168	139	146	149	145 *	
yield (t/ha)	5.85	5.74	5.12	4.50	4.81	
total production (000 t)	982	798	748	670	697 **	
table grape prod (000 t)	124	100	127	83	81	
net trade (000 t)						
end stocks (000 t)						
processing (000 t)	836	665	620	584	616	370
wine prod. (000 hl)	4361	3261	1646	2008	2008	
net trade (000 hl)	2533	1960	77	599	902	
wine cons. (000 hl)	1828	1301	1569	1409	1106	
per capita cons. (l/year)	20.0		18.4	16.6	13.0	

\* total area of which: 137000 ha on production (of which 16000 ha table grapes)  
8000 ha new vineyards

\*\*81000 t of table grapes and the rest of wine grapes

Source: Office International du Vin et de la Vigne

## ANNEX 3.9

cattle (at 1st January)										
	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995
beg. stocks (000 head)	1706	1678	1649	1613	1575	1457	1310	974	750	638
- in private farms			311	307	282	390	418	488	507	509
females (000 head)	670	653	646	648	617	609	575	489	419	351
- in private farms			155	157	145	203	237	295	321	292
born (000 head)	671	665	634	627	535	524	505	417	416	
imports (000 head)	5	2	2	2	2	0	0	0	0	
exports (000 head)	14	18	29	24	27	26	197	52	0	

sheep (at first January)										
	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995
beg. stocks (000 head)	9724	9563	8886	8609	8130	7938	6703	4814	3763	3398
- in private farms			2813	2701	2549	3178	3261	3582	3293	3136
females (000 head)	5872	5636	5366	5289	5007	4952	4528	3535	2839	2358
- in private farms			2162	2107	1987	2400	2476	2759	2545	2193
born (000 head)	6842	6119	5940	5365	5192	4521	4144	4467	2953	
imports (000 head)	1	1	1	1	0	0	0	3	0	
exports (000 head)	743	1119	1348	958	739	480	1477	649	300	

goats (at first January)										
	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995
beg. stocks (000 head)	460	441	428	436	433	498	553	611	676	795
- in private farms			424	433	429	495	551	610	676	795
females (000 head)	389	376	366	371	367	417	448	499	540	656
- in private farms			364	369	364	416	447	498	539	656
born (000 head)	447	434	402	372	386	342	409	490	621	
imports (000 head)	0	0	0	0	0	0	0	0	0	
exports (000 head)	38	47	45	33	25	3	7	5	5	

pigs (at first January)										
	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995
beg. stocks (000 head)	3912	4050	4034	4119	4352	4187	3141	2680	2071	1986
- in private farms			697	764	865	1031	820	838	747	1062
females (000 head)	337	333	394	365	381	392	298	271	198	345
- in private farms			61	78	93	126	99	101	87	175
born (000 head)	6148	5914	6299	6769	6444	5316	4584	3400	3209	
imports (000 head)	0	0	0	0	0	0	0	0	0	
exports (000 head)	0	0	0	22	29	21	148	0	0	

poultry * (at first January)										
	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995
beg. stocks (000 head)	39227	39732	41424	41805	36339	27998	21707	19872	18211	19126
- in private farms			14031	17715	13867	12481	10682	12001	12497	13595
females (000 head)			16656	16917	15459	14044	11110	10608	9521	11632
- in private farms			9756	9200	8554	8396	6850	6561	6313	8618
imports (000 head)	357	406	738	1099	1626	480	343	386	386	
exports (000 head)	14	690	57	80	70	0	89	34	34	

\* chickens, ducks, geese and turkeys

## ANNEX 3.10

beef and veal meat balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
slaughters (000 head)	649	643	607	602	578	556	637	559	538
weight (kg)	197	197	197	204	207	192	207	220	180
production (000 t)	128	127	120	123	120	106	132	123	97
imports (000 t)	10	7	13	23	10	0	1	17	10
exports (000 t)	16	12	5	8	3	0	5	1	1
disappearance (000 t)	122	122	128	138	126	107	127	139	106
p.c. disappear. (kg)*	13.58	13.56	14.19	15.39	14.02	12.4	15.02	16.44	12.51
p.c. disappear. (kg)**	10.44	10.43	10.91	11.84	10.79	9.54	11.55	12.65	9.62

mutton and lamb meat balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
slaughters (000 head)	5377	4788	4176	4146	3947	4464	3940	1167	3109
weight (kg)	15	15	16	16	15	16	14	51	16
production (000 t)	83	74	65	67	60	70	56	59	48
imports (000 t)	1	0	8	12	13	0	0	0	0
exports (000 t)	20	18	19	21	17	1	7	3	3
disappearance (000 t)	64	57	54	58	56	68	49	56	45
p.c. disappear. (kg)*	7.17	6.31	5.95	6.49	6.28	7.96	5.80	6.59	5.35
p.c. disappear. (kg)**	4.78	4.20	3.97	4.33	4.19	5.31	3.87	4.39	3.56

goat meat balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
slaughters (000 head)	385	366	328	320	278	264	317	400	526
weight (kg)	16	16	16	17	11	14	12	13	12
production (000 t)	6	6	5	5	3	4	4	5	7
imports (000 t)									
exports (000 t)									
disappearance (000 t)	6	6	5	5	3	4	4	5	7
p.c. disappear. (kg)*	0.68	0.65	0.58	0.59	0.33	0.43	0.45	0.59	0.77
p.c. disappear. (kg)**	0.46	0.44	0.39	0.40	0.22	0.29	0.30	0.39	0.52

pigmeat balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
slaughters (000 head)	5101	5086	5302	5629	5503	4909	4079	3618	3093
weight (kg)	73	73	74	73	74	74	76	73	69
production (000 t)	372	372	394	412	406	362	311	265	214
imports (000 t)	0	1	8	1	1	0	1	4	4
exports (000 t)	4	4	10	3	0	19	6	1	1
disappearance (000 t)	369	368	392	409	406	343	307	268	217
p.c. disappear. (kg)*	41.05	40.96	43.59	45.55	45.18	39.87	36.14	31.68	25.73
p.c. disappear. (kg)**	31.58	31.51	33.53	35.04	34.75	30.67	27.8	24.37	19.79

chicken meat balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
slaughters (000 head)	170525	174528	162900	180240	162873	83205	73949	62500	47384
weight (kg)	1.0	1.0	1.1	1.0	1.1	1.2	1.2	1.2	1.6
production (000 t)	167	169	183	188	182	100	89	75	74
imports (000 t)	0	0	1	0	0	0	0	6	6
exports (000 t)	29	24	36	35	17	13	16	4	0
disappearance (000 t)	138	145	148	153	165	87	73	77	80
p.c. disappear. (kg)*	15.34	16.15	16.47	17.07	18.35	10.11	8.612	9.046	9.419
p.c. disappear. (kg)**	10.96	11.53	11.77	12.19	13.10	7.22	6.15	6.46	6.73

total meat disappearance									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
disappearance (000 t)	699	698	726	765	757	608	560	544	454
p.c. disappear. (kg)*	78	78	81	85	84	71	66	64	54
p.c. disappear. (kg)**	58	58	61	64	63	53	50	48	40

\* carcass weight

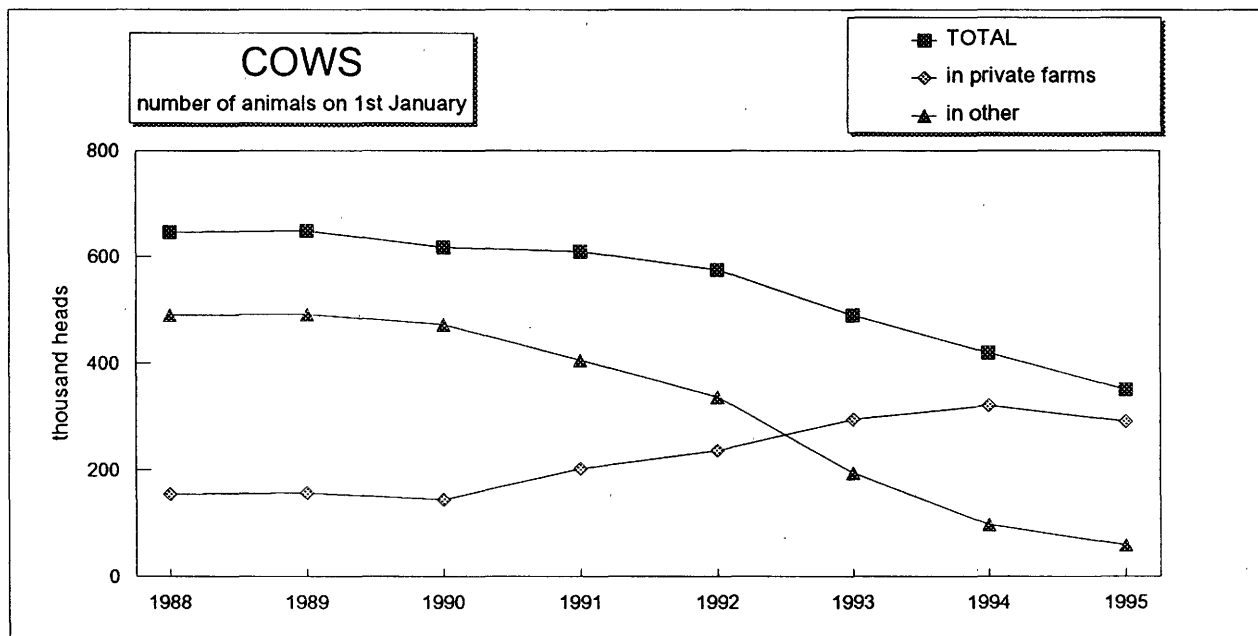
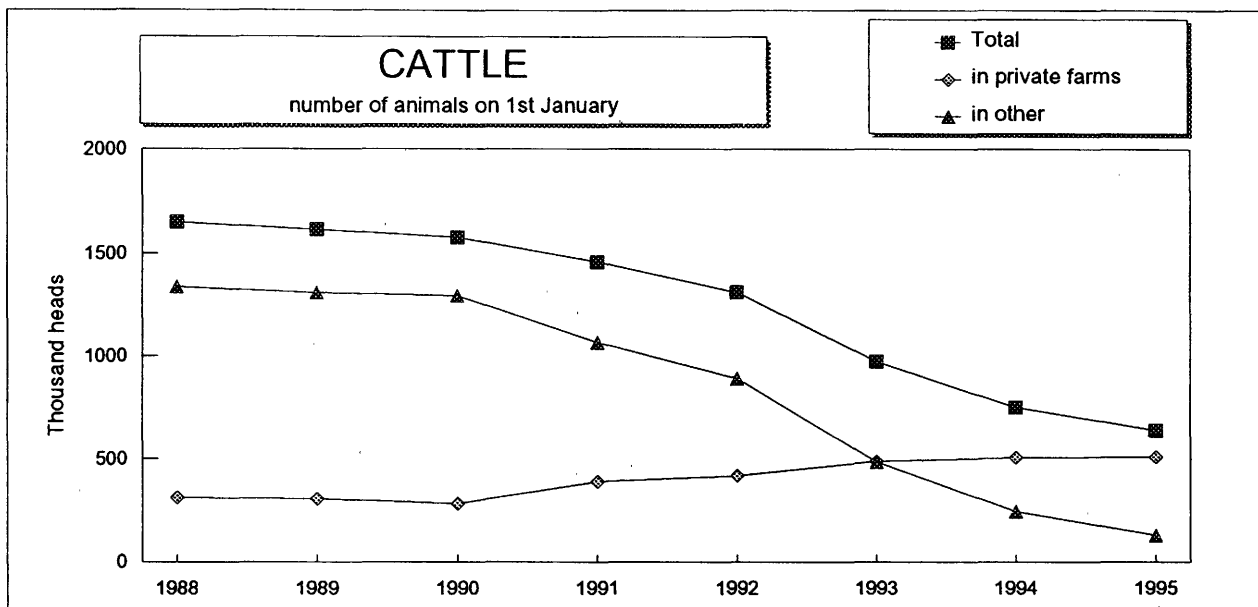
\*\* net weight

## ANNEX 3.11

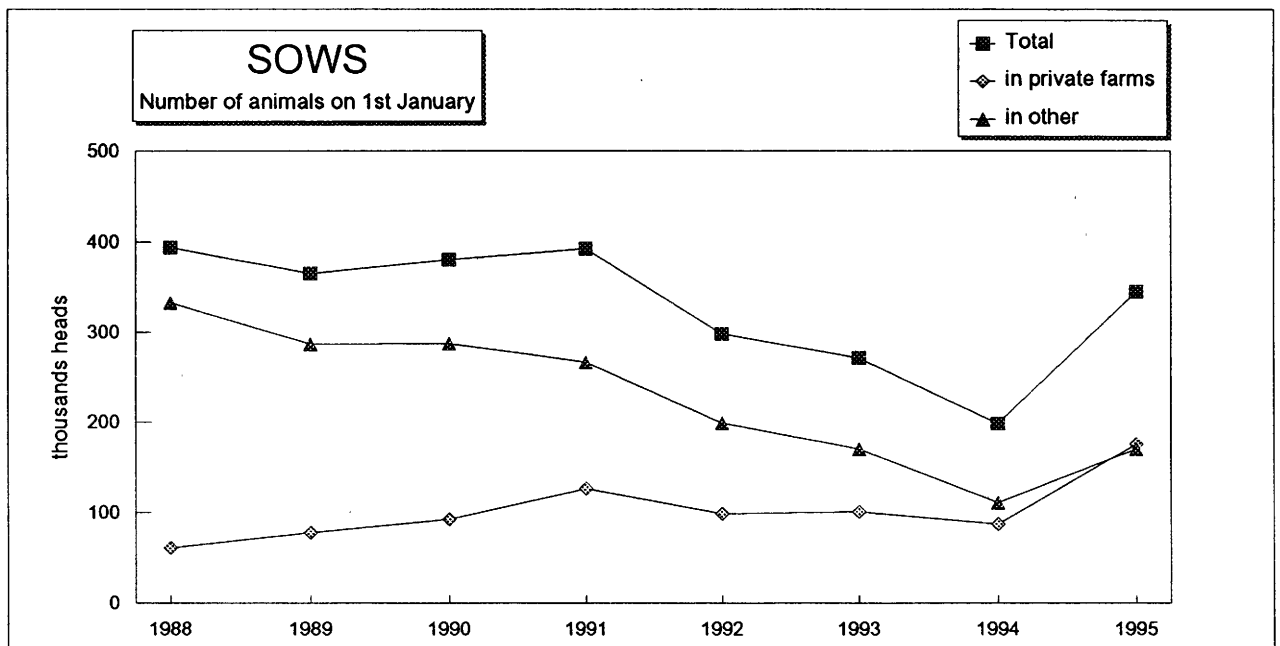
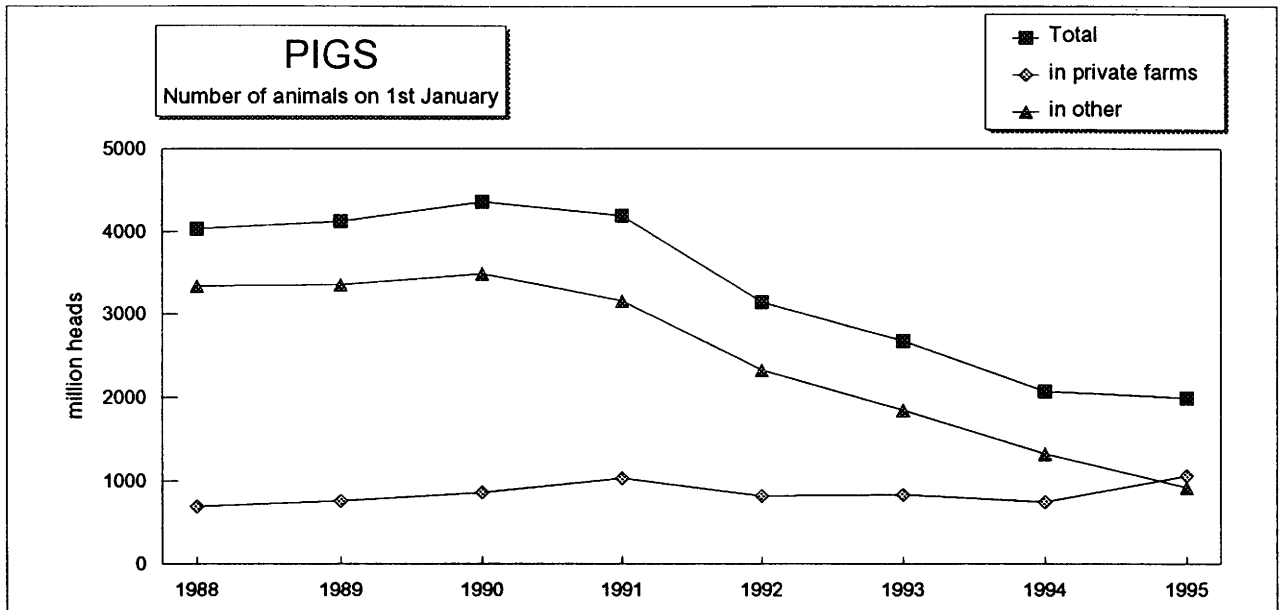
hen eggs balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
laying (000 head)	16712	16656	16757	16917	14044	11110	10608	9116	9521
weight (kg/head)	9.4	9.5	9.2	8.8	9.6	9.2	8.5	9.7	8.8
production (000 t)	158	158	153	150	135	103	90	88	84
imports (000 t)	0	0	0	0	0	0	1	1	1
exports (000 t)	8	6	8	4	5	0	0	3	3
disappearance (000 t)	150	152	146	145	131	102	91	87	83
p.c. disappear. (kg)	16.67	16.93	16.22	16.16	14.52	11.9	10.72	10.26	9.773

cow milk, whole, fresh, balance sheet									
	1986	1987	1988	1989	1990	1991	1992	1993	1994e
cows (000 head)	632	625	632	606	597	574	487	468	418
yield (kg/head)	3436	3488	3429	3524	3521	3066	3265	2818	2714
production (000 t)	2172	2181	2168	2135	2101	1760	1589	1319	1135
imports (000 t)	0	0	0	0	0	0	0	0	0
exports (000 t)	0	0	0	0	0	0	12	0	0
disappearance (000 t)	2172	2181	2168	2135	2101	1760	1577	1318	1134
-feed (000 t)	151	151	149	146	143	141	117	40	36
p.c. disappear. (kg)	241.9	242.6	241.2	237.5	233.7	204.8	185.9	155.8	134.2

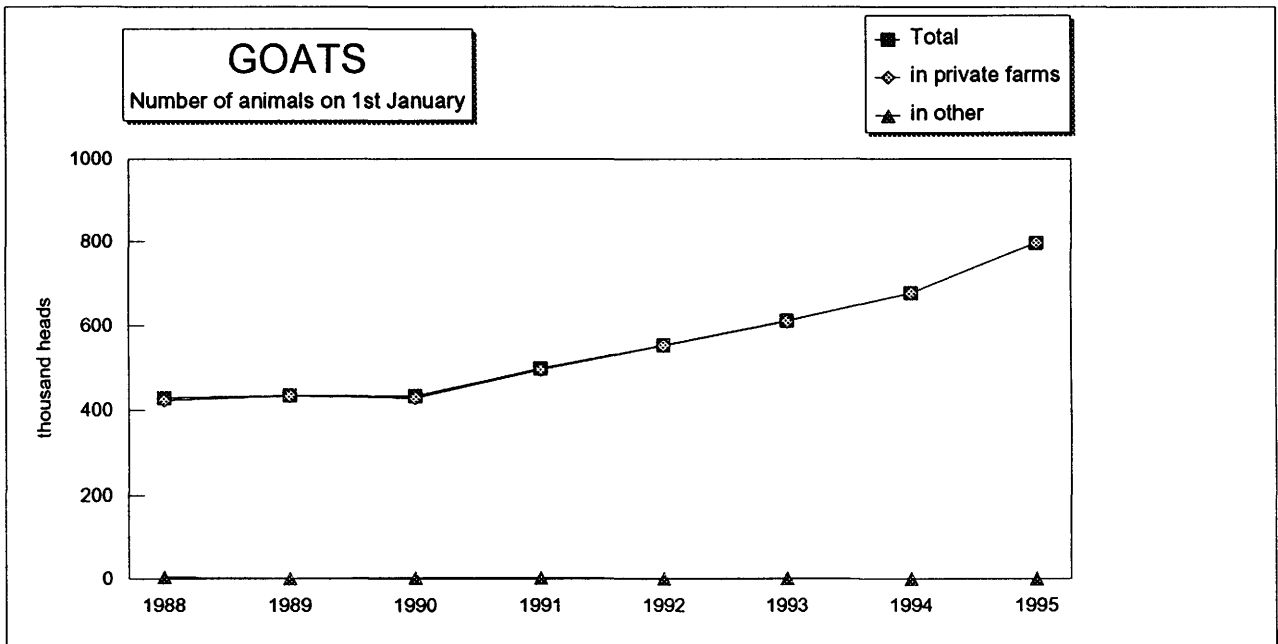
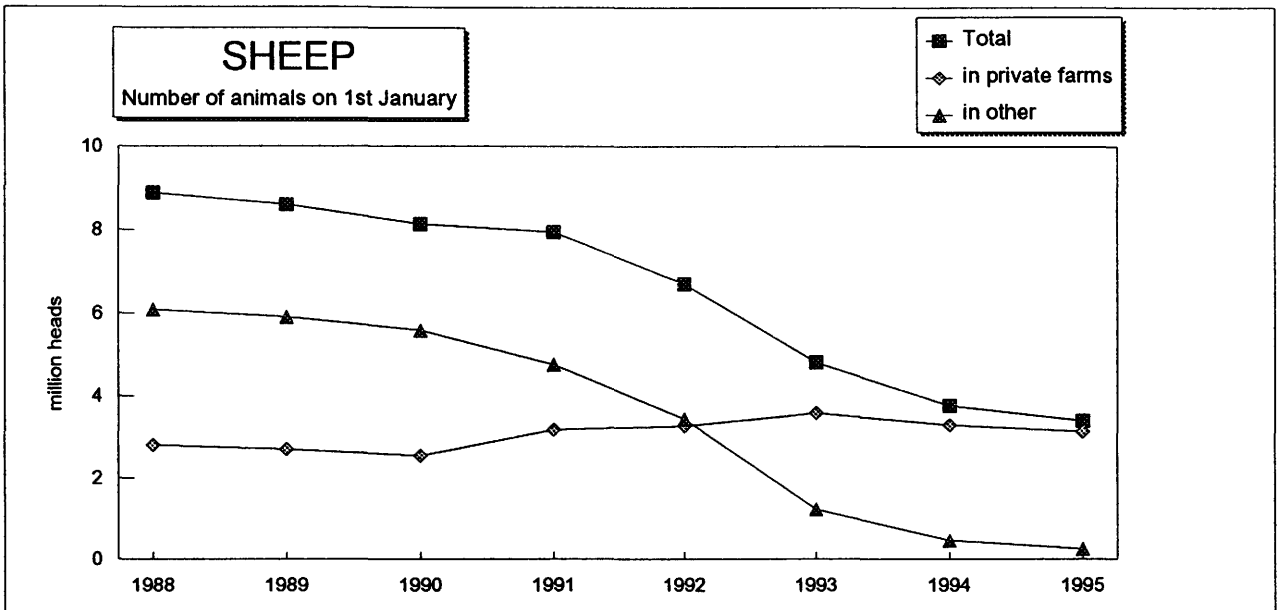
ANNEX 3.12



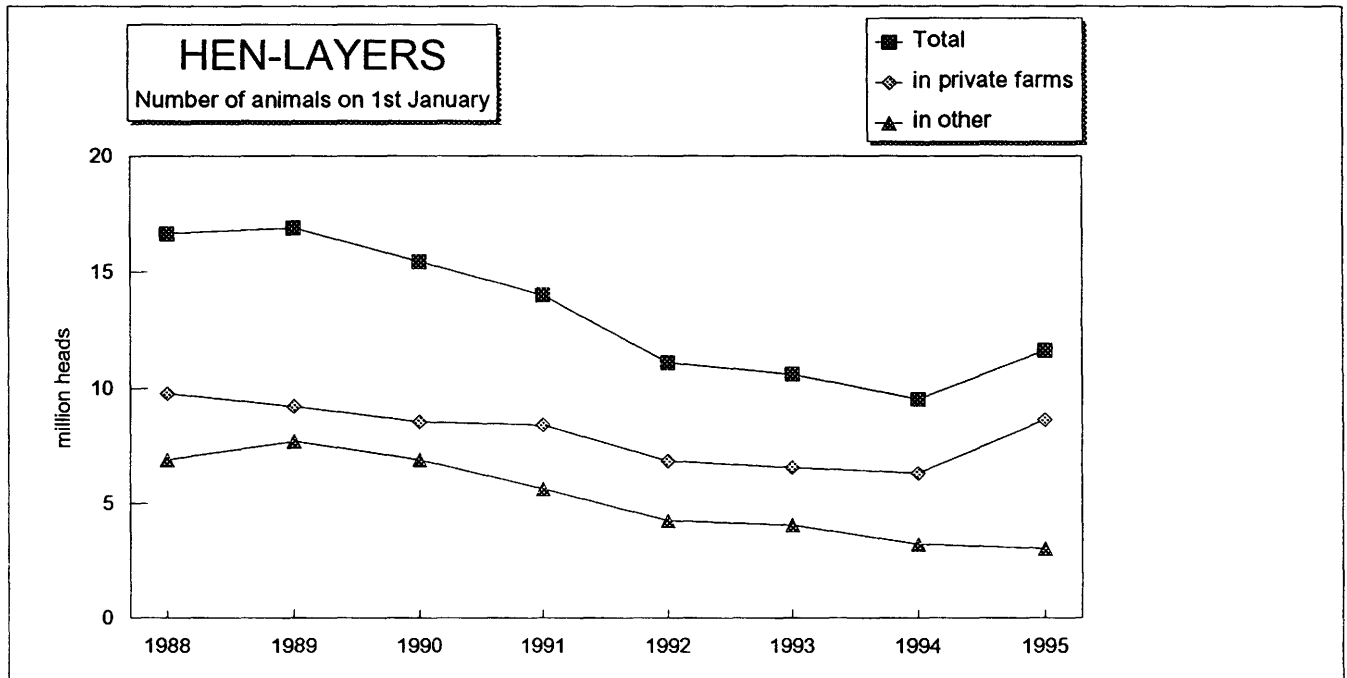
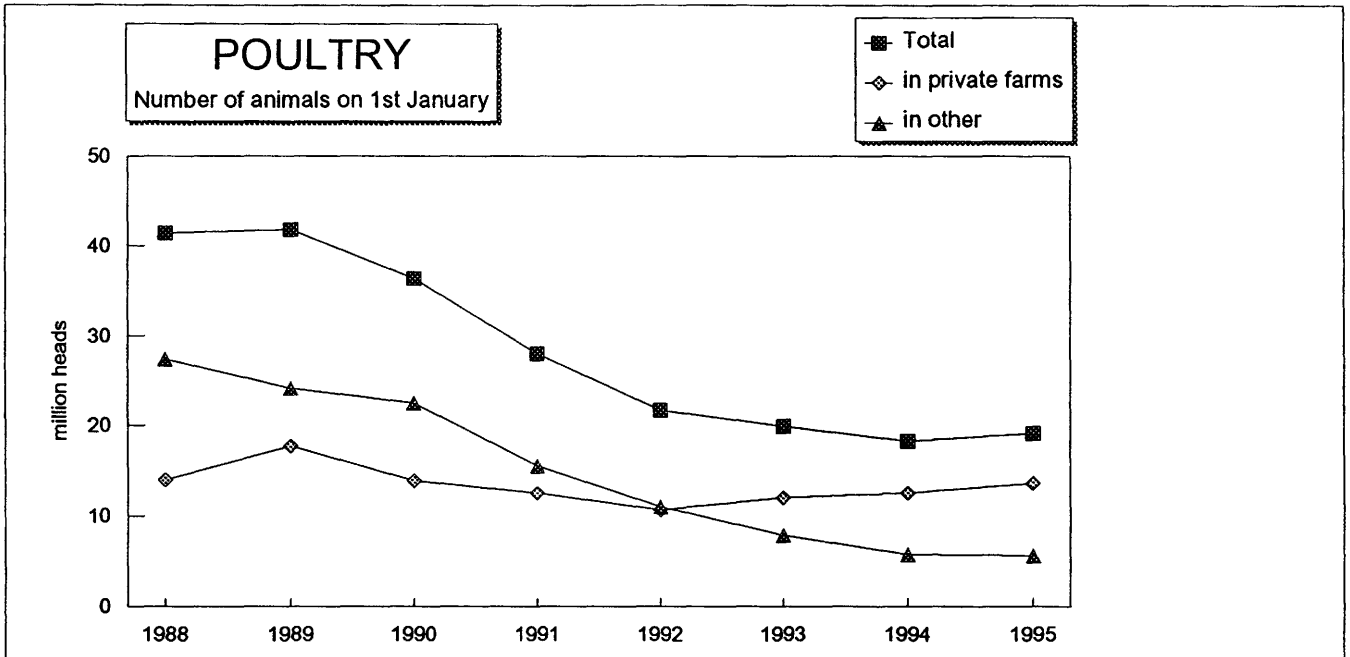
ANNEX 3.12



ANNEX 3.12



ANNEX 3.12





## ANNEX 4.1

## STATE OF PRIVATIZATION BY 31/12/94

No	Sector	Number of enterprises	Privatized enterprises		State companies under privatization	
			No of units	%	No of units by 1.03.95	% by 1.03.95
	<b>I. Agriculture - General</b>	<b>531</b>	<b>58</b>	<b>10.9</b>	<b>85</b>	<b>16</b>
1	Animal feed industry	33	7	21.2	12	36.4
2	Mills	38	5	13.1	6	15.8
3	Other grain processing activities	33			5	15.1
4	Agricultural production	32			2	6.2
5	Pig breeding	60	10	16.7	9	15
6	Poultry	33	7	21.2	10	30.3
7	Freshwater fishbreeding	16	2	12.5	10	62.5
8	Agrochemical services	29	2	6.9	2	6.9
9	Mechanization	155	15	9.7	7	4.5
10	Agricultural building construction	35	5	14.3	9	25.7
11	Seeds and planting material	9	1	11.1	4	44.4
12	Greenhouse, vegetable and flower production	26	2	7.7	5	19.2
13	Agricultural marketing	12				
14	Veterinary activities	15	2	13.3	3	20
15	Automatization systems for management and others	5			1	20
	<b>II. Food industry - General</b>	<b>251</b>	<b>13</b>	<b>5.2</b>	<b>43</b>	<b>17.1</b>
1	Food and beverage industries	54	5	9.3	7	12.9
2	Canning industry	47	1	2.1	9	19.1
3	Brewry industry	20	1	5	3	15
4	Wine industry	43			10	23.2
5	Vegetable oil industry	15			2	13.3
6	Dairy industry	52	6	11.5	11	21.1
7	Sugar processing industry	13			1	7.7
8	Fishbreeding and fishprocessing industries	4				
9	Others	3				
	<b>Total I + II</b>	<b>782</b>	<b>71</b>	<b>9.1</b>	<b>128</b>	<b>16.4</b>

MINISTRY OF AGRICULTURE AND FOOD INDUSTRY

ANNEX 4.2

Account statement in the state's upstream  
and downstream industries

No	Subsectors	Incomes (‘000 lv)	Expenses for the activity (‘000 lv)									Profit (‘000 lv)	Losses (‘000 lv)	Staff (number)
			Expenses Total	Variable expenses Total	Including for				Labour Expenses Total	Including for				
					Materials	Consulting	Amorti- zations	Others		Honora- ria and other fees	Social Security			
	<b>Total - Ministry of Agriculture</b>	<b>20277516</b>	<b>19388901</b>	<b>12262147</b>	<b>1033934</b>	<b>893757</b>	<b>642268</b>	<b>386780</b>	<b>2723098</b>	<b>1968914</b>	<b>754184</b>	<b>189097</b>	<b>3125197</b>	<b>47833</b>
1	Meat Processing Industry	3888804	3987274	3301741	2981385	126865	114249	89242	429709	315195	114514	7028	759437	9243
2	Dairy Industry	4526868	4421860	3652877	3252871	195047	105144	99815	374483	274797	99686	36718	82393	5512
3	Canning Industry	4005155	3521564	2763325	2380017	181861	139185	62262	517738	382014	135724	89604	437510	13949
4	Vegetable Oil Industry	2988625	2249338	1837046	1582226	165133	61745	27942	272180	193119	79061	215419	31860	3275
5	Wine Industry	5071383	3867620	2583471	1989749	309244	177699	106779	600174	436689	163485	178393	98513	7513
6	Brewery Industry	3229086	2539375	1952424	1472575	237202	144478	98169	403942	289759	114183	191013	127942	4929
7	Bakery Industry	174221	147076	129040	105844	18598	3270	1327	18036	12455	5581	7298	0	217
8	Fish Breeding	471096	505555	365305	152609	68743	21504	122449	94884	64182	29952	3497	136252	1868
9	Freshwater Fish Breeding	95776	97672	70416	49526	5712	8633	6545	21994	16020	5974	113	75358	483
10	Mills	4240079	3881467	2625672	2299072	198890	63286	64424	320246	229634	90612	16197	358746	5439
11	Animal Feed Industry	4418704	4053953	3412842	3225577	96376	49306	41583	236119	171518	64601	22025	348896	3467
12	Pig Breeding	3194187	3053850	662958	1492672	81031	53852	35403	299793	212682	87111	44419	1549034	4632
13	Poultry Industry	2864370	2746907	2109179	1844365	93443	133744	37627	28202	205154	76866	19046	461410	5871
14	Greenhouse, Vegetable and Flower Production	529404	500702	288260	209724	43498	27291	7747	124811	89884	34927	211	113629	2909
15	Seeds and Planting materials	1041560	916965	175767	66799	70473	17204	21291	164252	118389	45863	39161	4255	1967
16	Veterinary Activity	279064	269822	123543	89033	13906	11204	9400	74878	53542	21336	7451	4435	1068
17	Agrochemical Services	772730	777360	100099	46540	22690	14624	16245	82257	58694	23563	9346	13279	1199
18	Mechanization	1306412	1352483	784725	544139	77092	101693	61801	488551	351210	137341	24380	69567	9455
19	Agricultural Production	300640	320808	180243	120433	29190	18267	12353	61948	44920	17028	2529	66490	1389
20	Agricultural Marketing	124555	123868	53048	32290	14864	2738	3156	19371	14365	5006	446	7188	372
21	Agricultural Building Construction	1100416	1281967	668739	318851	140994	140056	68838	542848	399955	142893	3719	52259	9508
22	Automatization Systems for Management	9619	11077	6656	321	5598	370	367	4010	2947	1063	54	651	74

Source: Ministry of Agriculture

## ANNEX 5.1

### List of Food Products with Monitored Prices

#### At wholesale level

- white wheat flour
- brown wheat flour

#### At retail level

- brown bread 'Dobrugja'
- white bread 'Stara Zagora'
- meat with bones:   pork  
                          baby beef and veal  
                          lamb and weaned lamb  
                          poultry
- fresh pasteurised cow's milk
- yoghurt from cow's milk
- white cheese in brine
- sunflower oil, refined \*
- butter \*
- egges \*
- pasta\*
- sausages \*
- yellow cheese from cow's milk \*
- white sugar \*
- small white beans \*
- lentils \*
- rice \*
- potatoes \*
- baby food \*

\* products included in the monitoring system in April 1994

## ANNEX 6.1

## EUR 12. IMPORTS FROM BULGARIA (000 ECU)

	1986	1987	1988	1989	1990	1991	1992	1993	1994
01 LIVE ANIMALS	10978	11409	11758	16318	16487	15132	12933	8275	14017
02 MEAT AND EDIBLE OFFAL	11269	11612	11543	17501	18413	16516	19202	24020	33208
03 FISH, CRUSTACEANS, MOLLUSCS	7014	4082	2955	5516	2843	2749	3963	2105	6814
04 DAIRY PRODUCTS, EGGS	10652	10594	9915	9857	7821	10204	8865	12499	13044
05 PROD. ANIMAL ORIG. N.E.S.	1023	692	714	593	360	553	289	982	1045
06 TREES, PLANTS, FLOWERS	531	504	261	217	487	863	777	453	587
07 EDIBLE VEGETABLES	4367	4601	4185	6643	9315	19943	21812	7636	15988
08 EDIBLE FRUIT AND NUTS	3919	6143	4285	4539	7165	17727	7883	8413	9736
09 COFFEE, TEA, SPICE	3337	902	748	1944	3244	1486	1752	1412	1441
10 CEREALS	21	417	177	199	716	388	745	185	120
11 PRODUCTS MILLING INDUSTRY	0	0	1	3	90	40	2	2	12
12 OILSEEDS, OLEAGINOUS FRUITS	5742	6227	9052	12605	12924	21788	23508	19843	17059
13 LAC, GUMS, RESINS	5	10	2	83	80	172	49	13	142
14 VEG. PLAINTING MATERIALS	2	14	19	5	47	140	221	202	94
15 FATS AND OILS	337	237	1764	1464	1287	621	2731	1494	2647
16 PREPARATIONS MEAT AND FISH	464	1425	746	872	1223	1573	1969	4290	4420
17 SUGAR AND CONFECTIONERY	7	4	0	0	249	4	171	279	210
18 COCOA AND PREPARATIONS	1	0	0	0	0	0	6	8	26
19 PREPARATIONS CEREALS, FLOURS	0	1	0	0	1	24	103	55	69
20 PREPARATIONS VEGETABLES, FRU	7644	5896	8823	11674	13265	16330	12434	10911	9632
21 MISCELLANEOUS EDIBLE PREP.	37	11	106	43	36	101	98	581	801
22 BEVERAGES, SPIRITS & VINEGAR	9117	11585	17337	19216	29262	37158	37431	44753	42812
23 RESIDUES & WASTE FOOD INDUST	8975	9609	11956	11451	12355	13742	11006	9947	6917
24 TOBACCO	19535	14149	12224	12660	14204	14495	16027	16875	17813
1-24 TOTAL PROD.AGRI	104977	100124	108571	133403	151874	191749	183977	175233	198657
1-99 TOTAL ALL PRODUCTS	572194	523332	461622	530857	582878	751834	897714	950105	1342378
% PROD.AGRI/ALL PROD.	18.3	19.1	23.5	25.1	26.1	25.5	20.5	18.44	14.8

## EUR 12. EXPORTS TO BULGARIA (000 ECU)

	1986	1987	1988	1989	1990	1991	1992	1993	1994
01 LIVE ANIMALS	3982	1130	1261	2988	3392	5628	1689	2149	2633
02 MEAT AND EDIBLE OFFAL	1476	1095	6119	14800	3618	28530	581	12744	8685
03 FISH, CRUSTACEANS, MOLLUSCS	3346	2662	2226	3669	1693	1181	1650	4461	4829
04 DAIRY PRODUCTS, EGGS	3076	3367	36579	17710	12748	26288	3828	8673	6795
05 PROD. ANIMAL ORIG. N.E.S.	232	165	99	171	54	30	449	1214	1166
06 TREES, PLANTS, FLOWERS	305	272	395	365	269	137	271	193	310
07 EDIBLE VEGETABLES	1104	1083	519	485	426	1124	999	2373	2441
08 EDIBLE FRUIT AND NUTS	9583	3931	4597	5496	7227	5213	9863	16459	35940
09 COFFEE, TEA, SPICE	2622	497	760	361	1374	2246	1300	5644	14671
10 CEREALS	21459	5146	11763	4633	974	28882	25	4527	570
11 PRODUCTS MILLING INDUSTRY	240	73	107	108	52	419	135	4777	467
12 OILSEEDS, OLEAGINOUS FRUITS	1557	494	704	1950	1420	1237	677	1123	1774
13 LAC, GUMS, RESINS	345	302	202	150	217	138	78	415	324
14 VEG. PLAINTING MATERIALS	319	215	242	249	38	73	0	14	15
15 FATS AND OILS	4858	5564	3365	2843	3025	2715	5519	8005	10964
16 PREPARATIONS MEAT AND FISH	221	1056	474	1549	324	3114	2346	4577	6637
17 SUGAR AND CONFECTIONERY	927	978	967	992	11235	5479	14562	9145	4890
18 COCOA AND PREPARATIONS	2646	3891	3124	2501	3728	5689	8478	17221	23880
19 PREPARATIONS CEREALS, FLOURS	1056	1152	1304	1616	4374	1865	3717	12811	10068
20 PREPARATIONS VEGETABLES, FRU	4942	3407	3772	9176	3905	3942	2660	12557	9866
21 MISCELLANEOUS EDIBLE PREP.	2955	2385	2807	2082	3849	5854	7782	13948	18377
22 BEVERAGES, SPIRITS & VINEGAR	9723	8807	10646	11453	14845	16148	28076	46578	39444
23 RESIDUES & WASTE FOOD INDUST	6402	15081	12293	11899	3607	3067	3368	2585	2582
24 TOBACCO	7444	7709	5405	5394	3798	6197	26917	29702	20839
1-24 TOTAL PROD.AGRI	90820	70462	109730	102640	86192	155196	124970	221895	228166
1-99 TOTAL ALL PRODUCTS	1472124	1460136	1405706	1476891	900494	1032653	1111654	1346073	1702122
% PROD.AGRI/ALL PROD	6.2	4.8	7.8	6.9	9.6	15.0	11.24	16.48	13.4

## EUR 12. BALANCE TRADE WITH BULGARIA (000 ECU)

	1986	1987	1988	1989	1990	1991	1992	1993	1994
01 LIVE ANIMALS	10978	11409	11758	16318	16487	15132	-11244	-6126	-11384
02 MEAT AND EDIBLE OFFAL	11269	11612	11543	17501	18413	16516	-18621	-11276	-24523
03 FISH, CRUSTACEANS, MOLLUSCS	7014	4082	2955	5516	2843	2749	-2313	2356	-1985
04 DAIRY PRODUCTS, EGGS	10652	10594	9915	9857	7821	10204	-5037	-3826	-6249
05 PROD. ANIMAL ORIG. N.E.S.	1023	692	714	593	360	553	160	232	121
06 TREES, PLANTS, FLOWERS	531	504	261	217	487	863	-506	-260	-277
07 EDIBLE VEGETABLES	4367	4601	4185	6643	9315	19943	-20813	-5263	-13547
08 EDIBLE FRUIT AND NUTS	3919	6143	4285	4539	7165	17727	1980	8046	26204
09 COFFEE, TEA, SPICE	3337	902	748	1944	3244	1486	-452	4232	13230
10 CEREALS	21	417	177	199	716	388	-720	4342	450
11 PRODUCTS MILLING INDUSTRY	0	0	1	3	90	40	133	4775	455
12 OILSEEDS, OLEAGINOUS FRUITS	5742	6227	9052	12605	12924	21788	-22831	-18720	-15285
13 LAC, GUMS, RESINS	5	10	2	83	80	172	29	402	182
14 VEG. PLAINTING MATERIALS	2	14	19	5	47	140	-221	-188	-79
15 FATS AND OILS	337	237	1764	1464	1287	621	2788	6511	8317
16 PREPARATIONS MEAT AND FISH	464	1425	746	872	1223	1573	377	287	2217
17 SUGAR AND CONFECTIONERY	7	4	0	0	249	4	14391	8966	4680
18 COCOA AND PREPARATIONS	1	0	0	0	0	0	8472	17213	23854
19 PREPARATIONS CEREALS, FLOURS	0	1	0	0	1	24	3614	12756	9999
20 PREPARATIONS VEGETABLES, FRU	7644	5896	8823	11674	13265	16330	-9774	1646	234
21 MISCELLANEOUS EDIBLE PREP.	37	11	106	43	36	101	7684	13367	17576
22 BEVERAGES, SPIRITS & VINEGAR	9117	11585	17337	19216	29262	37158	-9355	1825	-3368
23 RESIDUES & WASTE FOOD INDUST	8975	9609	11956	11451	12355	13742	-7638	-7362	-4335
24 TOBACCO	19535	14149	12224	12660	14204	14495	10890	12827	3026
1-24 TOTAL PROD.AGRI	104977	100124	108571	133403	151874	191749	-59007	46662	29509
1-99 TOTAL ALL PRODUCTS	572194	523332	461622	530857	582878	751834	213940	395968	359744

## ANNEX 6.2

### COMMENTS ON SOME AGRICULTURAL COMMODITY EXPORTS

Tobacco and cigarettes which provided almost 60% of the total value of agricultural exports in 1987/89, provided just under 27% in 1994. Monopolistic practises have aggravated the remaining parts of the sector. The decrease in the volume exported of tobacco and cigarettes to the CIS has contributed to the contraction in the production of tobacco. In the CIS markets, the main destination for Bulgarian tobacco, an opposite relationship between new competitors and new kind of tobaccos have created difficulties to maintain the Bulgarian' share of this market.

Concerning Wine, Bulgaria exported almost 70% less in 1994 than in 1987/89. The decline in wine exports reflects the declining level of wine production in Bulgaria and the decline in demand from the markets of the CIS, Poland and other CEECs. These countries accounted for over 80% of total Bulgarian wine exports.

Live animals exports have increased compared to the period 1987/89 and this has mainly been due to the sale of restituted animals by private owners who do not wish to rear animals or do not consider it to be a viable enterprise. In 1992 a 'peak' in exports coincided with a 25%-30% decline in pigs, poultry and cattle numbers. Prior to the reform period, the numbers of live cattle, pigs and poultry exported from Bulgaria were very small. Only live sheep exports were important (about 1 million animals per year in average).

In the meat sector, sheepmeat and pigmeat have fluctuate considerably since 1989. However pigmeat exports have stagnated since 1992 after a peak in 1991. Sheepmeat and poultry meat exports have decreased in value and in quantity compared to 1987/89. In the case of poultry meat, the reduction has been significant (-57% in 1992). The major factor contributing to the decline (poultry meat) and fluctuating (pigmeat) volumes of exports of these meats has been the dismantlement of the largely state-controlled traders and the general lack of financial resources in the CIS and former Yugoslavia (main destinations of Bulgarian meats) with which to pay for imports. Also, many producers in Bulgaria are currently finding it difficult to raise livestock at prices that are competitive on world markets. The rise in costs of imported feed has also contributed to the decline in livestock numbers in Bulgaria during recent years.

Processed meat exports decreased substantially. The main reason for the virtual disappearance of this export market was the break-up of the former CMEA trading system. CIS and Cuba were the traditional destinations of canned meat products on a barter trade basis. With the break-up of the trading system, these export market arrangements ceased. Alternative markets have been extremely difficult to find since the products are largely unsuitable for other markets: inappropriate products and/or perceived to be of low quality by Western standards. As a result, the majority of the Bulgarian meat processing industry is operating at greatly reduced capacity.

For cereals, traditionally the main export product has been wheat, with Bulgaria being a net exporter of wheat but a net importer of coarse grains (principally barley). With the 1993 and 1994 ban on exports, wheat remained only for domestic markets.