



AHDB cereal exports **competitor report**

Bulgaria

Harvest 2019

Grain is mainly produced in the north and north-east regions of Varna, Razgrad and Lovech, which between them produce just over 50% of Bulgaria's wheat.

Barley production is mainly in the Danubian plain, bordering Romania in the northern regions of Montana, Lovech, Razgrad and Varna.

Cumulative rainfall during the winter cereal development stage provided adequate water resource to supply the plants through the ear formation and flowering phases. The good moisture content in the soil was favourable for spring cereal development. Satisfactory yields were attained given the good growing conditions that prevailed this season. Soft wheat yields exhibited a wider value range with rather low test weights; protein content values were also rather low at the start of the harvest but have tended to improve as harvesting has progressed.

Wheat production is at 5.7Mt, and barley at just above 0.5Mt for 2019/20.

Exports

The vast majority of Bulgarian wheat exports are to EU markets. Spain is the largest recipient, taking in over 1Mt in 2018/19 and 2019/20, followed by Italy and Greece. According to Ministry of Agriculture data, 16% was of a milling quality, down from 48% in 2017/18. Feed wheat accounted for 84% in 2018, versus 52% in 2017. The smaller share of milling wheat, along with lower Danube River levels, challenged exports. Another limiting factor was phytosanitary fees charged for exports to third countries, making Bulgarian exports less competitive, particularly against stiff regional competition from Russia and Ukraine.*

There is no segregation of wheat varieties in Bulgaria and quality can vary from year to year. Bulgarian wheat is often traded as a feed wheat, but it goes into the milling industry, which makes it highly competitive.

Overall wheat exports from the country are as high as 4Mt. Competing with Russia brings challenges, however, with neighbouring countries like Greece providing an outlet for some of the volume.

Regarding barley, non-EU markets account for 60% of Bulgaria's exports. Barley export markets have changed, with higher amounts to Libya and Tunisia and lower exports to Spain and Greece in 2018, compared with the previous season. Ministry of Agriculture data indicates good quality, with brewing barley at 67%.*

*Source: Grain and Feed Report, Bulgaria, May 2019

Main ports in Bulgaria

Port Balchik and Varna Bay are the two main ports handling grain exports from Bulgaria. Port Balchik is the sea gate of Dobrudzha, one of the biggest productive regions for grain in Bulgaria. With its excellent transport connections and crossroad location, port terminal Balchik is a convenient 'bridge' for the cargo flows between Europe, Russia, Ukraine, Caucasus, Middle Asia, Middle and Far East

Port terminal Balchik is a multipurpose port which is equipped with modern facilities. It is a specialised terminal for handling general cargo, as well as dry and liquid bulk. The port terminal is operational 24 hours per day, 7 days a week, 365 days per year. The major turnover of the port is based on handling bulk cargo, mainly grain.

Varna Bay Port is the main gate for Bulgaria's grain exports and accommodates large vessels up to 50,000 tonnes. A new mobile laboratory and an additional automatic sampler is to be installed at Ezerovo port, near Varna.

Bulgarian wheat and barley exports

Wheat

Unit (Tonnes)	2017		2018
Spain	1,740,537	Spain	1,331,975
Greece	417,860	Italy	526,462
Italy	381,448	Romania	378,961
Romania	244,457	Greece	325,921
Libya	226,538	Germany	260,893
Sudan	171,851	Ireland	215,462
India	143,862	Netherlands	208,639
Portugal	120,864	UK	162,140
Morocco	92,772	Libya	158,622
Egypt	82,585	Portugal	149,828
Netherlands	65,609	Egypt	62,076
Lebanon	53,507	Ethiopia	45,730
Djibouti	49,750	Yemen	35,000
Sweden	46,832	Morocco	32,341
Ethiopia	44,496	Belgium	27,105

Source: Eurostat

Barley

Unit (Tonnes)	2017		2018
Spain	139,626	Libya	74,648
Greece	83,353	Greece	50,398
Libya	23,675	Cyprus	39,530
Cyprus	22,016	Tunisia	27,500
Portugal	15,698	Algeria	17,402
Syria	13,518	Turkey	15,182
Turkey	10,470	Romania	14,676
Romania	4,721	Lebanon	10,712

Source: Eurostat

Supply and demand

As at Dec 2019 1000 Mt	2018/19 Wheat	2018/19 Barley	2019/20 Wheat (Forecast)	2019/20 Barley (Forecast)
Beginning stocks	226	30	44	41
Production	5,590	437	5,702	530
Imports	38	1	15	2
Total supply	5,854	468	5,762	573
Exports	4,164	202	4,089	278
Feed domestic consumption	426	150	405	190
FSI consumption	1,025	50	1,065	50
Domestic consumption	1,646	225	1,652	265
Ending stocks	44	41	21	30

Source: Strategie Grains

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