



AHDB cereal exports competitor report

Bulgaria

Harvest

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.

Bulgarian wheat production in 2021/22 is estimated to amount to 7.1 million tonnes, 51 per cent higher than the previous season. The average wheat yields have averaged more than 6 t/ha, a welcome improvement on the drought-affected 4 t/ha in 2020/21, produced off a much smaller harvested area.

Bulgaria's barley crop has also recovered from last season's modest crop – up by 25 per cent to 700,000 tonnes this year.

Exports

Annual wheat exports for the marketing year 2021/22 are projected to amount to 5.5 million tonnes. Export growth to non-EU markets has been strong, with sales estimated to reach 2.8 million tonnes in 2021/22 according to Stratégie Grains. Main non-EU recipients of wheat include Philippines, Libya, Turkey and Indonesia.

Most Bulgarian wheat exports to EU remain Spain, Greece and Italy, which receive 1.5–2 million tonnes between them. Spain, one of the UK's traditional customers for wheat, now receives 0.6–1 million tonnes of Bulgarian wheat each year.

Just over half of Bulgaria's almost 400,000 tonnes of barley exports are destined to non-EU markets, with Libya being the main recipient over the past two seasons.

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 location near a major crossroads, Balchik port terminal is a convenient 'bridge' for the cargo flows between Europe, Russia, Ukraine, the Caucasus, Middle Asia and the Middle and Far East.*

Balchik port terminal is a multipurpose port, equipped with modern facilities. 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.** There is also has a specialized rail discharging station for grain carrying wagons.

* <http://www.port-balchik.com/en/connections/>

** <http://www.ubncorporation.com/index.php/activities/products-services/blog/90-grain-markets-and-logistics/174-bulgarian-black-sea-ports>

Bulgarian wheat and barley exports

Wheat

Units = tonnes	2020		2019
Spain	636,679	Spain	1,150,668
Greece	438,973	Greece	476,071
Romania	386,386	Romania	382,582
Philippines	266,918	Philippines	369,637
Libya	193,959	South Korea	231,352
Italy	183,608	Italy	223,834
Turkey	144,221	Indonesia	220,769
Sudan	132,444	Lebanon	207,835
Lebanon	122,882	Portugal	204,145
Thailand	116,637	Netherlands	195,602
Israel	108,706	Libya	166,678
Tunisia	92,358	Ireland	129,550
Indonesia	79,532	Israel	99,396
Bangladesh	60,158	Tunisia	93,814

Source: IHS Maritime & Trade – Global Trade Atlas® – Eurostat

Further publication of the trade data is prohibited, unless expressly permitted by IHS Maritime & Trade.

Barley

Units = tonnes	2020		2019
Libya	94,838	Saudi Arabia	66,000
Morocco	57,564	Libya	59,947
Tunisia	50,073	Greece	45,955
Romania	49,898	Spain	33,399
Greece	46,735	Israel	25,381
Algeria	33,000	Cyprus	12,087
Cyprus	4,800	Romania	8,373
Oman	474	Portugal	5,654

Source: IHS Maritime & Trade: Global Trade Atlas ® – Eurostat

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Supply and demand

As at Feb 2022 Units = thousand tonnes	2021/22 Wheat	2021/22 Barley	2022/23 Wheat (forecast)	2022/23 Barley (forecast)
Beginning stocks	106	40	121	21
Production	7,171	699	6,248	549
Imports	22	1	22	2
Total supply	7,299	740	6,391	573
Exports	5,588	427	4,749	236
Feed domestic consumption	401	220	328	216
FSI consumption	1,025	47	1,034	47
Domestic consumption	1,540	292	1,525	289
Ending stocks	121	21	116	48

Source: Stratégie Grains