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Livestock and Products Annual

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Report Highlights:
Bulgaria's livestock sector continues to advance, despite marginally lower cattle and swine inventories in 2017. Farms continue to get larger and more efficient and the overall livestock industry continues to consolidate. 2017 beef production was flat while pork production grew slightly. The animal-disease situation was stable in 2017, although in June and July 2018 the European Union's first-ever cases *peste des petits ruminants* (PPR) were reported in Bulgaria. Pork producers and animal quarantine officials are currently monitoring for African swine fever (ASF), as recent ASF outbreaks have occurred just over the border with Romania, and elsewhere in the region. Pork remains the most widely produced and consumed meat in Bulgaria. Consumer demand for beef continues to get stronger. Bulgaria remains a net importer of pork and beef. Consumption patterns are driven by higher disposable incomes and a growing food service sector. The Bulgarian pork and beef industries are cautiously optimistic about their prospects in 2019, although ongoing animal-health challenges and potential trade-related issues pose threats.

General Information:

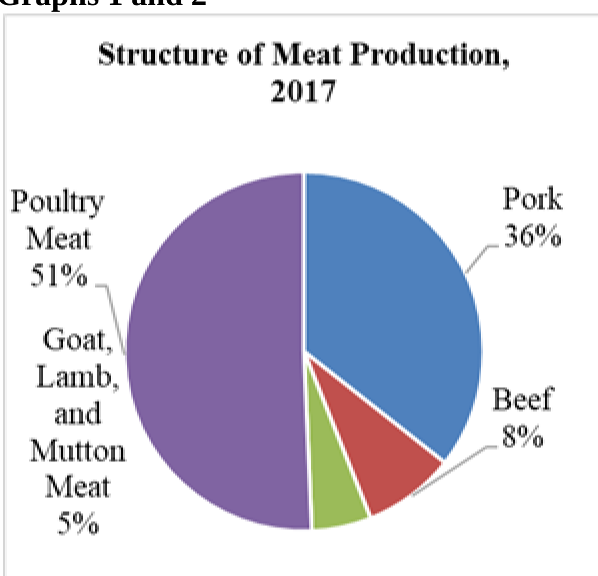
Overview

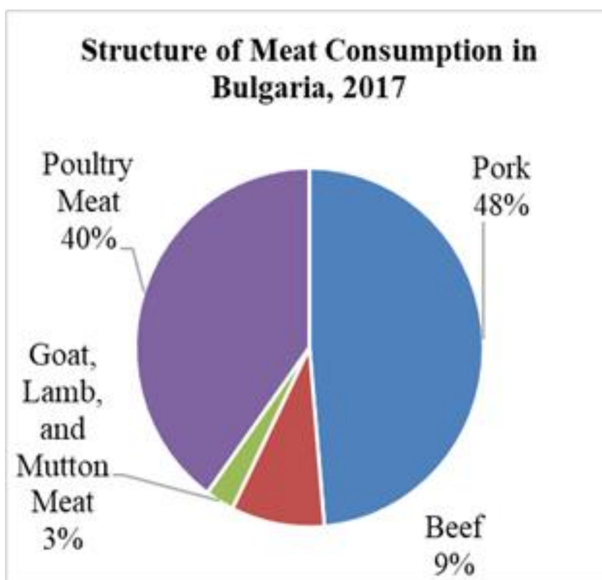
Pork continues to be the Bulgarian meat industry's dominant product. Beef production in 2017 remained flat, although beef cattle inventories are growing. In 2017, swine and cattle inventories decreased slightly. 77 commercial slaughterhouses processed Bulgarian hogs and cattle. Commercial slaughter rates increased by nine percent for cattle and by two percent for swine. On-farm slaughter declined by four percent for cattle and by 16 percent for hogs. Pork production increased by about three percent, while the beef supply grew slightly by less than one percent. Demand for higher-quality beef is driving domestic commercial beef production, as well as imports.

Poultry led total animal protein production at 51 percent, followed by pork at 36 percent, beef at eight percent and meat from sheep and goats at five percent (Graph 1). Pork's share expanded by two percentage points at the expense of poultry meat. Beef and goat, lamb, and mutton meat were stagnant. Pork also led consumption at 48 percent, followed by poultry at 40 percent, beef at nine percent, and goat, lamb, and mutton meat at three percent (Graph 2). Beef consumption increased from seven to nine percent, while pork and poultry shares declined by one percentage point each. Although total meat production in 2017 was flat, consumption grew by four percent due to favorable consumer demand. Demand growth was met by imports (Graph 3).

During the first four months of 2018, the Bulgarian meat processing industry reported higher slaughter rates and output for both beef and pork. Cattle slaughter increased by 13 percent and beef output increased by nine percent due to lower average carcass weights. Hog slaughter increased by six percent and pork output increased by seven percent over the same period 2017. Declining inventories and higher slaughter may lead to a slowdown in production rates later in the year. Also, epizootic threats, particularly ASF, also threaten momentum in the months ahead. Post expects that beef and pork production will see only marginal growth in 2018.

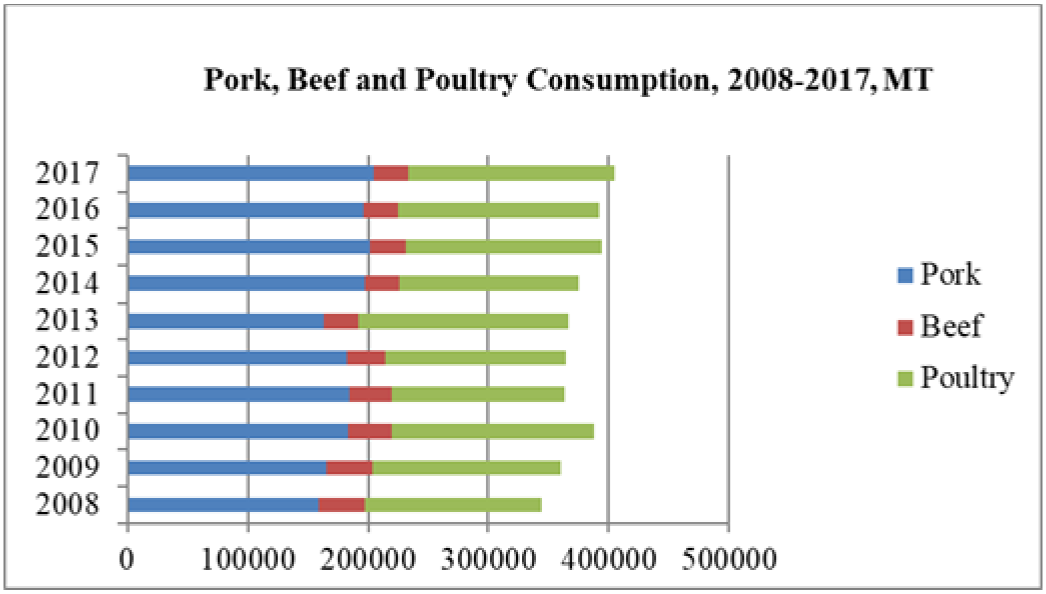
Graphs 1 and 2





Source: Ministry of Agriculture and Foods Statistical Bulletins

Graph 3

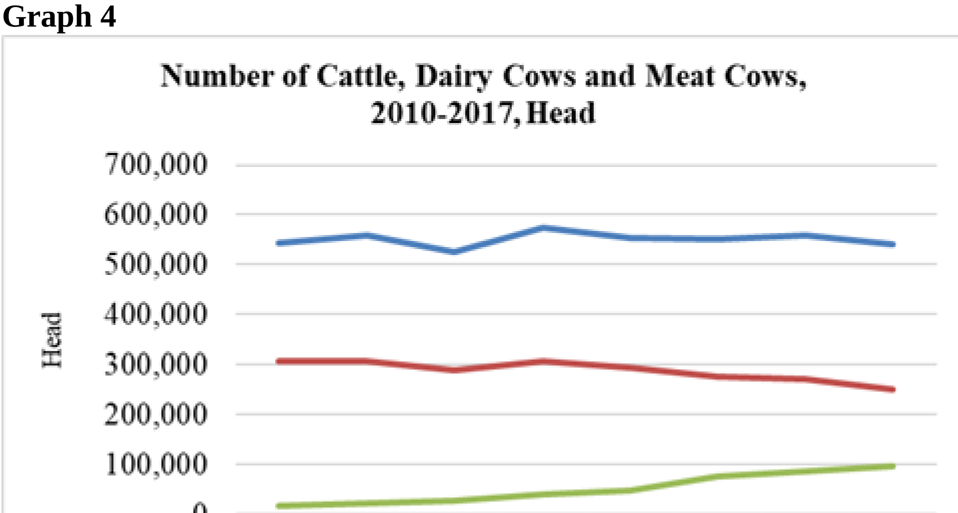


Source: Ministry of Agriculture and Foods Statistical Bulletins

Cattle and Beef

Cattle Inventory: Bulgaria's total cattle herd has contracted in recent years, due to ongoing dairy sector reform. After a temporary increase in 2016, 2017 cattle inventories decreased again by 3.2 percent and the number of cattle farms declined by 15 percent (Table 1 and Graph 4). Although the dairy herd continued to decline in 2017 by 2.4 percent, the beef cattle population grew by 12.5 percent (to 97,000 head) and accounted for 18 percent of overall cattle herd, versus 15 percent in 2016. This shift has resulted in more cattle per farm, from 14.5 head to 16.5 head (Table 1).

Graph 4



	2010	2011	2012	2013	2014	2015	2016	2017
Total Cattle	544,456	557,641	526,112	575,584	552,807	550,201	557,866	540,115
Dairy Cows	308,165	306,843	288,749	307,097	295,374	276,160	271,329	252,056
Meat Cows	18,643	23,134	28,546	39,670	49,122	76,411	85,870	96,635

Beef Farms: Dairy industry reforms and targeted coupled-support subsidies continued to motivate unprofitable dairy farmers to switch over to beef production. Although there are about 8,000 beef farmers in Bulgaria, many of whom are located in the southcentral region of the country, only about 1,600 have dedicated beef operations. The need for improved genetics, still widespread poor agricultural management, the lack of approved slaughterhouses, non-existent beef trading standards, and the gray market remain the primary challenges to beef farms.

Animal Health: Following the outbreak of lumpy skin disease (LSD) in 2015/2016, the subsequent vaccination regime and import restrictions, no new cases were registered in 2017 and 2018. In 2018, to date, the epizootic situation for beef has significantly improved.

Selection and Breeding: Farmers and the breeding associations made significate efforts to improve selection work in 2017/2018. Several trade shows and a number of outreach seminars targeted high-quality genetics. New DNA tests are planned to be introduced in 2018 to support better selection process. According to the Ministry of Agriculture (MinAg) data and industry reports, about 37 percent of cattle (dairy and beef) (110,000 head) are currently under selection control, of which 12,000 are beef cattle. In October 2017, the MinAg paid a subsidy of 5.5 million leva ($3.4 million) to all breeding associations (48 total) to cover administrative and related costs of selection work.

Beef Supply and Demand

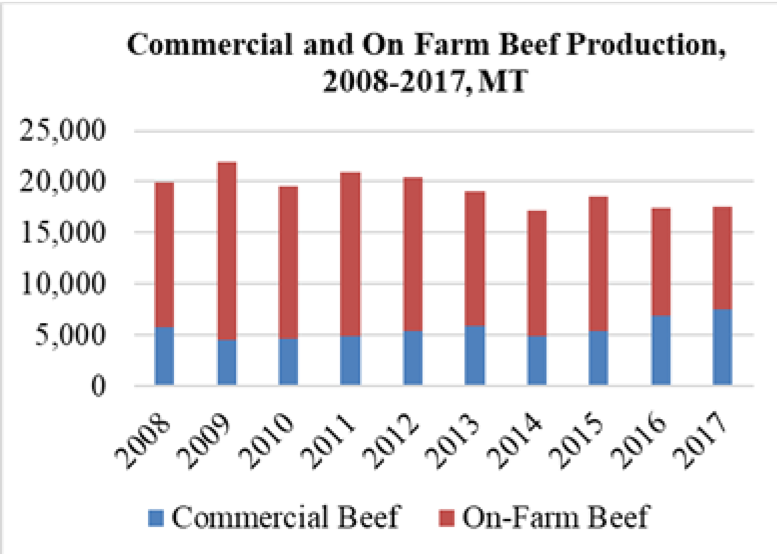
Beef accounted for eight percent of the total 2017 animal protein production and nine percent of consumption basket. While most beef is still sourced from unproductive dairy cattle, beef from commercial beef farms is increasing and often channeled to restaurants and specialty retail outlets. According to independent experts, about 30 percent of quality beef is channeled to the hotel, restaurant, and catering (HORECA) sectors.

In 2017, the total beef slaughter, including on-farm slaughter, decreased slightly by 0.7 percent. Beef output, respectively, stagnated (+0.3 percent) (Table 2). Strong consumer demand and the changing structure of the beef supply chain drives demand for commercial beef instead of on-farm production (Graph 5). Commercially-slaughtered beef accounted for 43 percent of beef production compared to 39 percent in 2016, an increase of nine percent over 2016. The 2017 monthly commercial slaughter average was between 2,200-4,600 head, peaking above 4,000 head during the last quarter of the year (Table 2 and 3).   In 2017, there were 10 dedicated cattle slaughter plants.

In contrast, on-farm beef production in 2017 declined. The number of slaughtered cattle decreased and beef output was five percent lower, although it still accounted for 57 percent of total beef. This type of beef is usually consumed in rural areas and does not reach retail or restaurant outlets.

Organic beef production is limited (260 Metric Tons (MT) in 2016). The number of cattle raised as organic (in transition of conversion) increased to about 10,000 head in 2017 but only 2,000 of them produced certified organic products.

Graph 5



Source: Ministry of Agriculture and Foods Statistical Bulletins

Data indicates that in 2018 (January-April) commercially slaughtered cattle and beef output increased by 13 percent and nine percent, respectively. Due to lower beginning inventories, Post expects that current slaughter rates may not be sustainable later in the year. Post forecasts marginally higher beef production in 2018 and 2019.

Consumption
Beef consumption has been stable at 28,000-30,000 MT since 2012. Official per capita consumption was reported slightly higher at 1.0 kg per capita in 2016 and 2017. According to MinAg data (Table 3), imports increased in 2017 to 21,000 MT, 33 percent higher than in 2016, spurring a 31-percent consumption increase to 38,000 MT. This data is also confirmed by industry reports and sources, as well as trade sources and reported sales. (Note: World Trade Atlas data shows lower imports in 2017 under PSD Beef, in CWT, see Table 4). In 2017, local beef stocks accounted for about 46 percent of domestic consumption, a decrease from 60 percent in 2016. Based on above data and industry sources, the forecast higher consumption levels in 2018 and 2019.

Bulgarian consumers prefer higher-quality chilled cuts and convenient packaging. High-quality imported beef is usually sold in the food service sector. A few retail players have also started offering imported fresh cuts. In 2017 and 2018, some commercial beef farms began direct sales to select restaurants and/or specialty retail outlets. Their major challenge is providing consistent quantity and quality product due to smaller volumes of operation. Gourmet burgers have become trendy and are increasingly offered in non-specialized outlets.

Trade
Cattle: Live cattle imports are small and tend to consist of breeding stock. In 2017, imports increased by 33 percent and reached 11,500 head, coming mainly from Germany and the Czech Republic (PSD Live Cattle, WTA). During the first four months of 2018, breeding stock imports decreased by 40 percent to 2,100 head from Germany and the Czech Republic.

Live-cattle exports are generally shipped to neighboring countries like Turkey, Albania, and Kosovo.

2017 live cattle exports continued to increase by 45 percent, reaching 41,000 cattle (valued at $55 million), most of which was shipped to Turkey. During January-April 2018, exports moderated and showed 48 percent reduction from the corresponding period in 2017.

Beef: 2017 beef imports decreased by 33 percent to 13,700 CWT (Table 4) (World Trade Atlas). Local MinAg 2017 data show imports at 21,000 MT, a 33-percent increase (Table 3). World Trade Atlas and Eurostat import data are much below Bulgarian MinAg data. Major beef suppliers to Bulgaria are Poland, Romania, Italy, and the Netherlands. U.S. beef is reportedly re-exported to Bulgaria from Italy, the Netherlands, and Austria. WTA data for January-April 2018 shows a five percent decline in beef imports. Italy was a leading supplier in the first half of the year.

Following a growth in fresh beef imports (HS#0201) in 2016, imports in 2017 dropped by 32 percent to about 2,600 CWT. In value terms, imports decreased by 14 percent from $9.0 million to $7.8 million. Trade data from January-April 2018, reflect that fresh beef imports decreased by 18 percent over the same period last year, mainly due a 40-percent price increase. Main suppliers of fresh beef to Bulgaria are the Netherlands, Italy, and Romania. Frozen beef imports (HS#0202) decreased by 34 percent to 10,000 CWT in 2017 and by another eight percent in January-April 2018. Poland, Italy, and Romania are Bulgaria's primary frozen beef suppliers.

Beef exports are usually small. Exports declined from 6,200 CWT in 2016 to 2,100 CWT in 2017, mainly to the Netherlands and Poland.

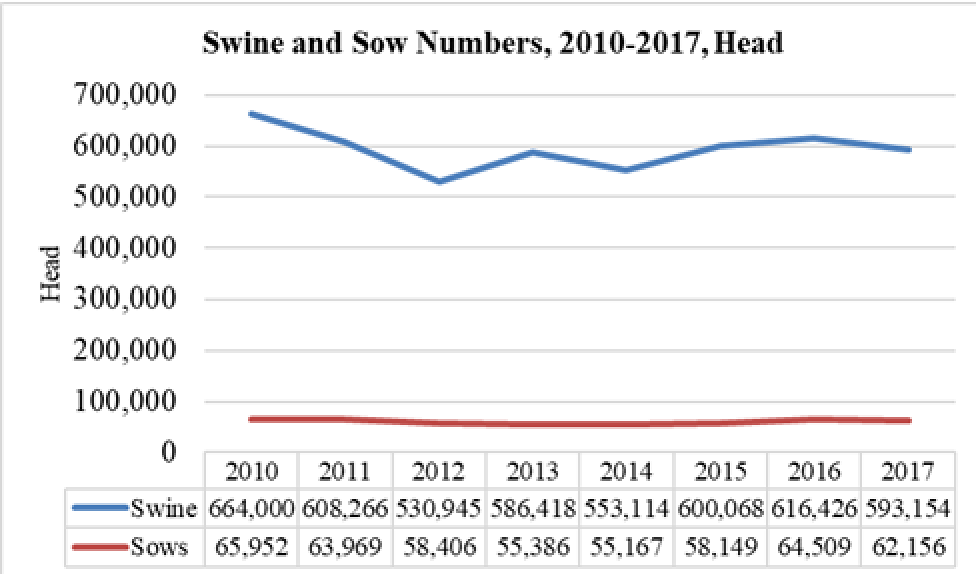
Swine and Pork

Swine Inventory: Over the last two years, the hog and pork industries have became more efficient and commercialized, including new pork processing investments. Following growth in swine inventory in 2015/2016, in 2017 the total swine herd decreased by 3.8 percent, with the number of breeding sows dropping by 5.3 percent (Graph 6). Producers tried to optimize the size of their operations and become more efficient.

Pork Farms: Farms continued to consolidate with swine farms in 2017 totaling about 8,000, a 26-percent from 2016 (Table 7 and Graph 6). This resulted in higher numbers of animals per farm at 73.2 head/farm compared to 56 head/farm in 2016. The industry is dominated by 40 large commercial operations which account for 89 percent of swine inventory, are vertically integrated and have continued to invest in improvement of farm efficiencies.

The number of sow farms experienced a 25 percent decline. The average number of sows per farm increased from of 39.3 head to 49.7 head, with 97 percent of sows raised at farms with more than 10 sows (Tables 6 and 7).

Graph 6



Source: Ministry of Agriculture, Foods and Forests Statistical Bulletins

Pork Production

Bulgaria's hog slaughter and the pork output increased marginally by 1.1 percent and 2.6 percent, respectively. In parallel with farm development, pork production at commercial-scale farms grew by 3.7 percent while on-farm supplies witnessed a decrease of 16.1 percent in slaughtered animals and of 13.7 percent in produced pork (Table 8, Graph 7).

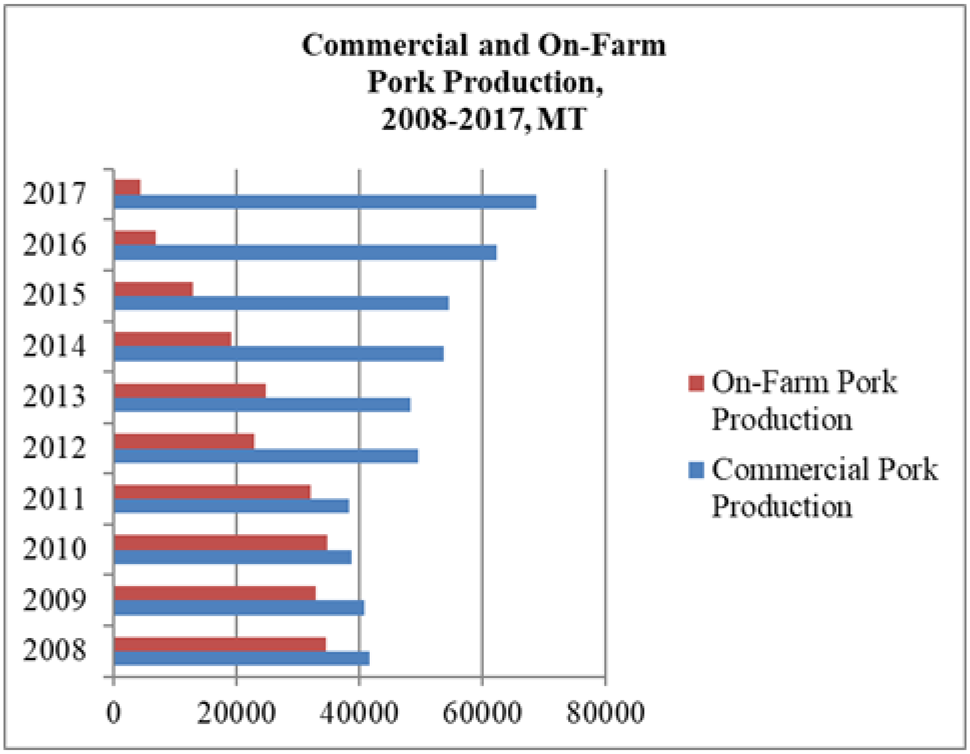
Currently, Bulgaria has 77 small/medium size slaughterhouses, with swine slaughtered at 69 of them. 21 slaughterhouses are specialized for swine only. Hogs slaughtered at slaughter plants accounted for 96 percent of total slaughter, as well as 95 percent of total pork, one percentage point more than in 2016. The average carcass weight was slightly higher at 66.8 kg/head.

On-farm pork production continued to fall. The carcass weight is usually higher than at commercial slaughterhouses and in 2017 it was at 83.3 kg/head. On-farm pork production shrunk and accounted for five percent of all pork supply compared to six percent in 2016 (Tables 8 and Graph 7).

Data for January-April 2018 indicates that the commercial hog slaughter increased by six percent and pork output increased by seven percent over the corresponding period in 2017. Due to lower hog inventories, slaughter rates are forecast to slow down later in the year. Another risk is the challenging ASF situation, which may result in commercial and backyard losses. Post expects Bulgaria's pork production will increase marginally in 2018 and 2019, to upwards of 77,000 MT.

Investment in pork farms and processing plants, including by foreign investors, abundant feed at competitive prices, and favorable consumer demand indicate that that domestic production will meet upwards of 60 percent of Bulgarian demand in about three years, versus 34 percent presently. The local industry also made concerted efforts to improve productivity and farm management, quality of meat, and marketing. In 2017, Bulgaria imported 53 percent more breeding sows over 2016.

Graph 7



Source: Ministry of Agriculture and Foods Statistical Bulletins

The low supply of local carcasses keeps prices higher prices for local producers. According to industry and EU reports, the prices of E-class Bulgarian carcasses are priced at 10 to 20 percent above the EU average prices. This makes local pork more expensive than in most of the EU and prevents exports. As of July 2018, the average Bulgarian price for E-class carcass was €171.30/100 kg carcass ($209) compared to the EU average of €145.85/100 kg carcass, 17- percent difference. Between January and July 2018, the price declined by eight percent, while annual price change (June 2018 to June 2017) declined by 20 percent, which was in-line with the EU average, which was down by 17.8 percent.

Consumption

Since 2016, Bulgarian pork consumption has consistently increased. According to official data, per capita pork consumption in 2017 was at 9.4 kg, comparable to 9.5 kg in 2016. Household purchases were also stable at 21.1 kg/household. The pork balance (Table 9) shows that consumption in 2017 increased by 3.3 percent to 211,000 MT, a record high. Strong demand drove import growth by 3.8 percent to 141,000 MT, also the highest to date. According to industry estimates (source: Inteliagro), fresh consumption is estimated at 70,000 MT and the remaining 140,000 MT is used for processing. Imports accounted for 67 percent of consumption in 2017 versus 34 percent for domestic production. Most imported pork is frozen cuts and used for processing. Imports are priced generally 10-12 percent below domestic pork, per industry reports. Growth in pork consumption paralleled with higher poultry and beef consumption, resulting in a four percent increase in total animal protein consumption (Graph 3).

In recent years more consumers have showed a preference for fresh meat over processed meat products, mostly due to the perceptions that it is more healthful and of better quality. This trend is driving the emergence of specialty butcher shops which offer local pork from select farms. These shops can successfully compete with supermarkets. To respond to consumer demand for quality meat products, in April 2018 *Lidl* retailer introduced a program for quality meat products under private labels. These products should not contain mechanically deboned meat. The retailer also expanded its *Clean Label* products that should contain no artificial additives. Two more retailers, *Kaufland and Billa*, undertook campaigns to promote authentic local meat products, registered in the EU, through tastings and promotions. In addition, the MinAg and the Bulgarian Food Safety Agency (BFSA) in collaboration with the meat processing industry are considering an introduction of a new voluntary standard for sausages. These standards are likely require at least 75 percent meat content in processed products. The idea was introduced as a result of "dual food standards" debate in the EU but it has not been finalized yet.

Trade

Live Swine: Imports of live swine vary and consist mainly of breeding stock and occasional pigs for fattening. Sources for most breeding sows are the Netherlands, Denmark and Belgium.
2017 imports were about 33,000 head, a 53 percent increase from 2016 (World Trade Atlas, PSD Live Swine). During the first four months of 2018, imports grew by a considerable 68 percent to 7,000 head (originating from the Netherlands, Denmark and Belgium), largely driven by new investments. 2017 live-swine exports included 7,000 head to Romania and Albania, and to date in 2018, 2,200 head, mainly to Romania.

Pork Meat: Data shows imports in 2017 at 152,000 CWT or 3.8 percent more than 2016 (Table 10) (PSD Pork and processed pork products in CWT equivalent). Major suppliers of pork were Spain, Germany, and France. Good pork availability at competitive prices on the EU market supported imports meeting favorable consumer demand. In January - April 2018 imports continued to grow by 10 percent. Spain was leading with 35 percent share in imports.   Post expects annual pork meat imports to be slightly higher in 2018.

Pork exports (mainly processed products) are usually small (Table 11). In 2017 exports were at 6,000 MT or 23 percent higher than in 2016. Exports are limited due to the deficit market and good local demand as well as some sanitary restrictions to third markets. The main market is Greece with small quantities to Romania. In January - April 2018 exports increased by 31 percent to the same markets.

Agricultural and Trade Policy for Livestock and Products Sector

Epizootic Situation, Swine

In March 2016, Bulgaria applied to the OIE to be recognized as free of Classical Swine Fever (CSF). In September 2017, the audit which concluded successfully and in May 2018, OIE declared Bulgaria as CSF free.

Bulgaria is on high-alert regarding any detections of ASF due to recent outbreaks in neighboring Romania, the latest one being only 60 kilometres over the border from Bulgaria. Geographically, the northeast region has the highest concentration of commercial pork operations (about 80 percent) and is also the nearest to Romanian outbreak locations. The GOB estimates possible ASF-related loses at over 2 billion leva ($1.3 billion). Experts anticipate that the ASF may hit the country in the next 30-60 days.

Biosecurity and mitigation measures as per the European regulations have been stringently adopted and monitored. Industry and authorities actions have intensified in July 2018 and additional budget of 4.5 million leva ($2.8 million) was approved for ASF prevention. National Emergency Taskforce was established to coordinate and oversee all necessary interagency actions related to ASF prevention. Two more local emergency regional offices were established in the towns of Dobrich and Silistra (northeast). The BFSA undertook a massive informational campaign in rural areas, especially with small, backyard farmers. Inspectors are visiting small farms and rural houses to renew swine records and prevent unregistered animals. A phone hotline was opened for any suspect reports.

Grain farmers in proximity to swine farms were advised to install electric fences. The Minister of Agriculture expressed high concern about weaker biosecurity at backyard farms and advised backyard farmers in 10 kilometers zones around commercial pork operations to slaughter all the pigs in order to guarantee better biosecurity for larger farms. The Minister visited 133 kilometers of border area with Romania where the authorities decided to build a special fence to stop wild boar migration. Police forces are guarding 10 km along the land border and checking luggage of passengers crossing the borders (passenger traffic in summer is high due to the tourist season). The BFSA banned imports of pork/pork products for personal use. Passengers at the border are inspected and products are destroyed if found. All crossing vehicles are disinfected. Ports along the Danube River banned garbage throwing at and around the ports.

To reduce wild boars as the main vector of ASF, Bulgaria's Hunting Act was amended (Official Gazette July 11, 2018) to open hunting of wild boar in the summer (from July 11 until December 31) instead of the standard season beginning October 1. To date, only individual hunting is allowed in this timeframe. This change caused debates regarding the measures efficiency and environmental impacts. Despite this legislative change, the MinAg recommended none or very limited organized group hunting due to other associated risks. Licensing fees for boar hunting were reduced fivefold. The goal is to reduce the boar population by at least 30 percent or to shoot 120,000 wild boars until the end of the year and collect 40,000 samples. Collection of truffles in forests was also banned for three months.

Epizootic Situation, Cattle

In November 2017, the MinAg increased the budget for animal disease vaccination and prophylactics by 5 million leva ($3.1 million) to cover extra expenses for vaccination against anthrax, lumpy skin disease, and tuberculosis. Cattle farmers have vaccinated for two years against lumpy skin disease (since 2017) for three years against bluetongue disease (since 2016). Vaccination against bluetongue disease will continue in 2018 and about 300,000 cattle will be re-vaccinated, following vaccination on 610,000 cattle in 2017.

In January 2018, the BFSA published its three-year program on anthrax. Vaccination programs with one or two vaccinations per year will be applied in different country regions depending on when the last outbreak had occurred in the last 30 to 50 years. In February 2018, the BFSA reported a case of Anthrax on a caw in Turgovishte area (northeast). No such cases were reported in the affected village in the last 50 years.

Epizootic Situation, Sheep and Goats

In June/July 2018, the country reported the first case in Bulgaria and in the EU of the highly-contagious ovine rinderpest, or PPR on farms near the Turkish border. To date, five detections in seven municipalities in two major country regions were registered. About 300,000 sheep and goats are located in these two regions, 30,000 of which are in the affected seven municipalities. The EC works in close coordination with the authorities to contain the disease. Testing continues and new, increasingly stringent biosecurity measures are being implemented. As of July 27, over 4,000 animals have been culled. The high risk of further contagion is complicated by the issue becoming heavily politicized. Please, see GAIN report BU1825 First Ovine Rinderpest Outbreak in Bulgaria.

Animal Identification

In January 2018, the MinAg updated its regulation (Decree No. 6) regarding animal-ear identification. A new requirement was introduced for ear tags to be certified by the International Committee for Animal Recording (ICAR). By July 18 2019, all cattle will be required to two ear tags also electronic ear tag and/or rumen bolus. The options for cattle farmers are: two ear tags; one ear tag and one electronic ear tag; two ear tags and rumen bolus. All cattle should be issued "passports" which will be registered in the BFSA integrated identification system. For swine, there will be an additional bar code placed on the ear tags that will indicate all changes related to the status of the animals without the need to change the ear tags.

Geographical Indicators

Bulgaria has one registered meat product, *pastarma govezhda* made from beef, registered under the Protected Geographic Indication scheme (OJ, L 160 of June 22, 2017). Five other similar meat products (various types of salami, made mainly from pork) registered as Traditional Speciality Guaranteed **products.**

Domestic Support

Swine: Since 2012 the MinAg has provided limited subsidies for adoption of voluntary higher than EU animal welfare standards at swine farms for minimum five years. The budget for 2017 was at 30 million leva ($17 million). In July 2017, the EC approved the MinAg notification to provide state aid for animal welfare at swine farms of 178 million leva ($11 million) for the period 2018-2022.

Cattle: In September 2017, cattle farms were approved to benefit from *de minimis* program under EC Regulation 1408/2013 with a budget of 7.6 million leva ($4.7 million). The program applies for cattle farmers with minimum five beef cows at a rate of seven leva/head ($4.4/head); dairy farmers with minimum 10 dairy cows at the same rate and sheep farmers with minimum 50 ewes at a rate of 3.7 leva/head ($2.3/head). In November 2017, MinAg paid six million leva ($3.7 million) payments to 15,000 farmers under this program. The MinAg continues to support investment at cattle farms using EU funds. At the end of 2017, the MinAg Paying Agency reported over 330 approved projects for subsidized investments at cattle farms.

In October 2017 and in January 2018, MinAg approved a budget of 41 million leva ($26 million) non-coupled support for cattle. In December 2017, the MinAg approved the subsidy rates for coupled support. Later in June 2018, the subsidy rates were increased due to available budgetary funds.

- Beef cows under selection control: budget of 3.2 million leva ($2.0 million) with eligibility requirement for minimum 20 beef cows under selection control – a set rate of 271.25 leva/head ($170) (increased to 280 leva/$180/head in June 2018) for farms with up to 250 animals, and 217 leva/head ($136) (increased to 224/$140/head in June 2018) for farms with more than 250 animals. The MinAg reported that 270 farmers were supported under this program.

- Beef cows: budget of 18.7 million leva ($12.0 million) for farms with 10-250 animals; rate for beef cows – 142 leva/head ($89) (increased to 173 leva/$108/head in June 2018). The MinAg reported that 6,500 farmers were supported under this program.
- Dairy cows under selection control: budget of 36.8 million leva ($23 million) with eligibility requirement for at least 20 cows under selection control and a minimum milk yield of 4,000 liters/cow; the rate was set at 596 leva/head ($372) for farms with 10-250 animals (increased to 632 leva/$395/head in June 2018); a rate of 477 leva/head ($298) (increased to 506 leva/$316/head in June 2018) was set for farms with more than 250 animals.
- Dairy cows: budget of 30 million leva for farms with 10-250 dairy cows and eligibility requirement for 2,000 kg milk/dairy cow and 1,500 kg milk/dairy cow in mountain areas. The rate was set at 254 leva ($159)/head (increased to 323 leva/$202/head in June 2018) and 250 leva/head ($156) for dairy cows in mountain areas (5-9 cows/farm).

Appendix:

Table 1. Cattle Farms as of November 2017

Changes at Cattle Farms in 2017 compared to 2016		
	Cattle	**Cows (Dairy and Meat)**
Total Head	540,100	348,700
2017/2016 Change in Inventory	- 3.2%	-2.4%
Number of Farms	32,700	30,300
2017/2016 Change	-15.1%	-14.9%

Average Number of Animals per Farm	16.5	11.5
2017/2016 Change	14.0%	14.7%
Source: Ministry of Agriculture and Foods Statistical Bulletins (#339 May 2018)		

Table 2. Cattle Slaughter, Commercial and On-Farm Sector, 2017

Cattle Slaughter in Head and in MT, Commercial and On-Farm Sector, 2017						
Number of Slaughtered Cattle	**Average Live Weight, kg**	**Total Live Weight. MT**	**Average Carcass Weight, kg**	**Total Carcass Weight. MT**	**Annual Change in Slaughtered Head, %**	**Annual Change in Carcass Meat, %**
Commercial Sector						
35,300	459.3	16,188	212.1	7,476	+9.0%	+9.0%
On-Farm						
82,400	243.8	20,893	121.9	10,043	-4.3%	-5.3%
Total						
117,700	315.0	37,081	148.8	17,519	-0.7%	+0.3%
Source: Ministry of Agriculture and Foods Statistical Bulletin #345/June 2018						

Table 3. Beef Meat Production, Imports, Exports and Consumption in 2012-2017, MT

Beef Meat Supply and Demand, MT					
Commercial Production	On-Farm Production	Total production	Imports*	Exports*	Consumption
2017					
7,476	10,043	17,519	21,045	797	37,768
2016					
6,860	10,603	17,463	15,851	4,566	28,748
2015					
5,363	13,185	18,548	12,560	2,423	28,685
2014					
4,876	12,334	17,210	14,671	1,962	29,918
2013					
5,877	13,229	19,107	10,036	1,073	28,069
2012					
5,355	15,022	20,377	9,699	952	29,124
Source: MinAg Statistical Bulletins Note*: Imports and exports include processed products and are recalculated in beef meat equivalent.					

Table 4. Bulgarian Beef Imports, 2014-2018 (January-March)

Bulgaria Import Statistics **Commodity: _PSD BEEF, _PSD BEEF, in CWT**		
Annual Series: 2013 - 2017, Year To Date: 03/2017 & 03/2018 **Quantity**		
Partner	**Calendar Year**	**Year To Date**

Country	2013	2014	2015	2016	2017	03/2017	03/2018	%Change
World	11662	18361	16106	20426	13739	2947	2730	-7.34
Poland	3380	7378	5140	5626	4439	1079	722	-33.03
Italy	2458	4161	2484	2515	3009	567	906	59.81
Romania	765	595	1697	3014	2333	633	291	-54.02
Netherlands	777	875	1655	1391	1080	170	159	-6.63
Spain	1889	1500	1725	4387	905	94	54	-43.25
France	444	943	926	668	592	121	116	-3.65
Germany	852	1348	1413	1293	323	51	54	7.23
Denmark	45	152	308	317	268	46	97	111.83
Hungary	127	190	92	162	180	32	70	115.36
Belgium	202	85	180	391	150	63	52	-17.58

Source: WTA

Table 5. Bulgarian Beef Exports, 2014-2018 (January-March)

Bulgaria Export Statistics Commodity: _PSD BEEF, _PSD BEEF, in CWT								
Annual Series: 2013 - 2017, Year To Date: 03/2017 & 03/2018 Quantity								
Partner Country	Calendar Year					Year To Date		
	2013	2014	2015	2016	2017	03/2017	03/2018	%Change
World	1257	2870	3222	6182	2124	370	456	23.21
Netherlands	2	3	4	2	580	1	138	∞
Poland	0	0	54	781	496	232	101	-56.63
Macedonia	126	287	194	194	330	38	30	-20.51
Greece	396	759	1596	4960	175	31	34	10.24
Belgium	100	7	6	15	139	2	27	1309.79
United Kingdom	4	21	40	62	127	18	45	145.61
Romania	9	138	647	21	90	1	3	133.72
Azerbaijan	0	2	0	0	33	0	0	n/a
Qatar	0	0	0	11	32	4	4	-8.47
Albania	0	4	3	30	31	31	0	-100
Kazakhstan	537	1331	348	0	28	0	0	n/a

Source: WTA

Table 6. Sow Farms as of November 2017

Sow Farms as of November 2017				
Number of sows per farm	Farms		Sows above 50 kg	
	Number	Change, % 2017/2016	Numbers, 000	Change, % 2017/2016
1-2	543	-27.2%	0.8	11.1%
3-9	232	-35.7%	1.2	20.0%

10 – 49	48	-42.8%	1.1	31.3%
50-199	35	-23.9%	3.6	23.4%
200 and above	40	11.1%	55.4	0.7%
Total	898	-29.5%	62.1	-3.7%
Source: Ministry of Agriculture and Foods, Statistical Bulletin 339/May 2018				

Table 7. Swine Farms as of November 2017

Changes at Swine Farms in 2017 compared to 2016		
	Swine	**Sows**
Total Head	593,100	44,700
2017/2016 Change in Inventory	-3.8%	-5.3%
Number of Farms	8,100	900
2017/2016 Change	-26.4%	-25.0%
Average Number of Animals per Farm	73.2	49.7
2017/2016 Change	30.7%	26.3%
Source: Ministry of Agriculture and Foods Statistical Bulletin #339 May 2018		

Table 8. Swine Slaughter, Commercial and On-Farm Sector, 2017

Swine Slaughter, Commercial and On-Farm Sector, 2017						
Number of Slaughtered Swine, Head	**Average Live Weight, kg**	**Total Live Weight. MT**	**Average Carcass Weight, kg**	**Total Carcass Weight. MT**	**Annual Change in Slaughtered Head, %**	**Annual Change in Carcass Meat, %**
Commercial Sector						
1,067,800	104.0	111,089	66.8	71,318	+2.0%	+3.7%
On-Farm						
46,100	129.8	5,982	83.3	3,842	-16.1%	-13.7%
Total						
1,113,900	105.1	117,070	67.5	75,160	+1.1%	+2.6%
Source: Ministry of Agriculture and Foods Statistical Bulletin #345/June 2018						

Table 9. Pork Meat Production, Imports, Exports and Consumption in 20012-2017, MT

Pork Meat Supply and Demand, MT					
Commercial Production	On-Farm Production	Total production	Imports*	Exports*	Consumption
2017					
71,318	3,842	75,160	141,029	4,677	211,513
2016					
68,793	4,449	73,242	135,805	4,366	204,681
2015					
62,401	6,859	69,259	130,396	3,728	195,927
2014					
54,589	12,852	67,442	136,904	2,391	201,955
2013					
53,699	19,206	72,905	129,023	4,138	197,790

2012					
48,437	24,811	73,248	94,837	4,733	163,263

Source: Ministry of Agriculture and Foods Statistical Bulletins.
Note: Imports and exports include processed products are recalculated in pork meat equivalent.*

Table 10. Bulgarian Pork Imports, 2013-2018 (January-March)

Bulgaria Import Statistics Commodity: _PSD PORK, _PSD PORK, in CWT								
Annual Series: 2013 - 2017, Year To Date: 03/2017 & 03/2018 Quantity								
Partner Country	Calendar Year					Year To Date		
	2013	2014	2015	2016	2017	03/2017	03/2018	%Change
World	129188	148527	150232	146826	152436	35661	40374	13.21
Spain	30942	32889	45506	51841	53372	12630	15125	19.75
Germany	27037	31201	25822	20817	25799	5290	7459	40.99
France	19434	26893	26952	22858	21014	4339	5202	19.9
Romania	3365	5914	4162	5761	8252	2722	1744	-35.93
Belgium	10142	9094	4995	4738	7205	1696	2047	20.75
Netherlands	8445	11366	11535	4438	6472	1268	1828	44.18
Hungary	6520	3627	5494	5350	5611	1075	1123	4.47
Poland	5196	9177	8580	5957	4861	1727	1241	-28.16
Italy	3605	3728	3064	7447	3957	1005	567	-43.57
Greece	3001	2508	2699	2033	3882	539	1334	147.39
Austria	1234	1734	2223	4300	2834	942	669	-28.98
Denmark	3783	2367	1789	1458	2377	164	730	346.15
United Kingdom	2934	2798	1572	2781	2273	823	405	-50.8
Cyprus	2607	3953	4539	2939	1377	501	245	-51.02

Source: WTA

Table 11. Bulgarian Pork Exports, 2013-2018 (January-March)

Bulgaria Export Statistics Commodity: _PSD PORK, _PSD PORK, in CWT								
Annual Series: 2013 - 2017, Year To Date: 03/2017 & 03/2018 Quantity								
Partner Country	Calendar Year					Year To Date		
	2013	2014	2015	2016	2017	03/2017	03/2018	%Change
World	4149	3797	3776	5126	6310	1311	1405	7.14
Greece	2165	1352	2192	3012	3440	562	686	21.9
Italy	108	49	3	350	704	248	26	-89.62
Belgium	46	64	67	171	454	127	51	-60.31
Romania	480	224	309	188	396	67	405	500.39
Germany	2	5	126	289	349	98	34	-64.96
United	235	79	119	58	315	60	84	39.13

Kingdom								
Macedonia	136	269	170	253	248	37	18	-50.49
Cyprus	87	132	327	46	74	37	8	-78.38
Netherlands	233	12	82	18	58	3	27	906.81

Source: WTA