

Bulgaria 2010



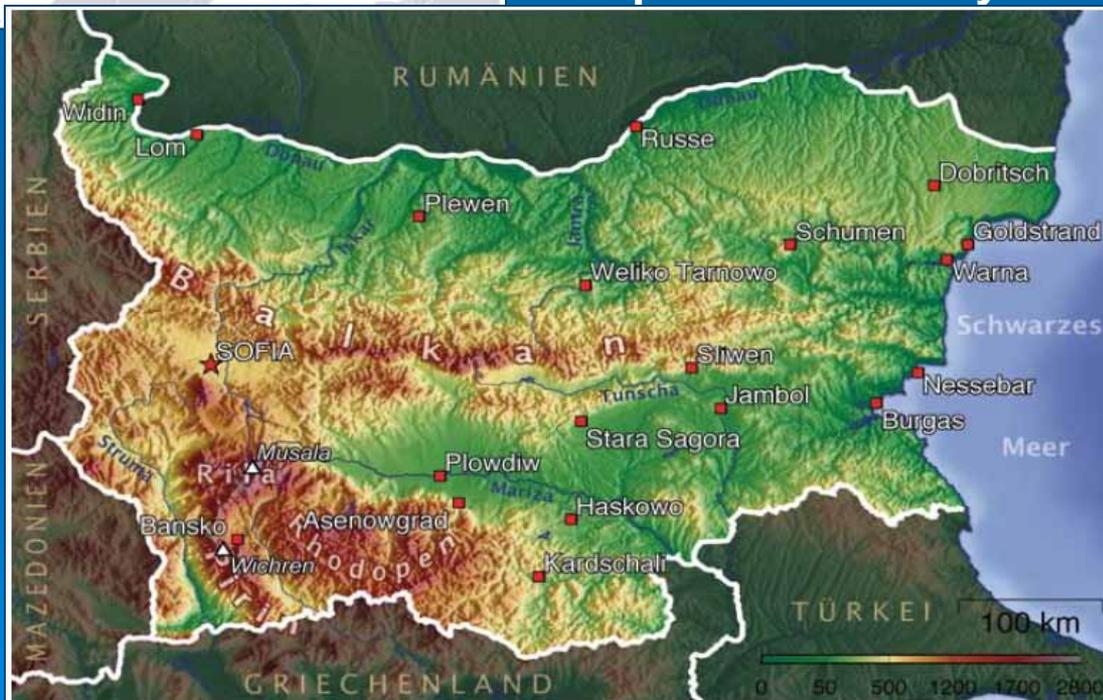
Agricultural Economics, Raspberry Industry

November, 2010

Location and General Information



- Situated in the South East Europe, Balkan Peninsula
- **Area** 110,994 km²
- **Population** 7,606,551 (December 2008)
- **Population density** of 70 inhabitants per km²



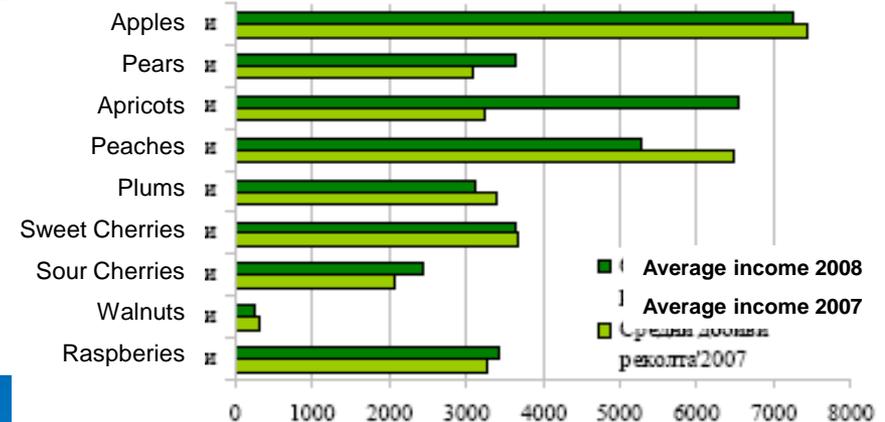
- Parliamentary Republic
- **Administrative units:**
 - ü 264 municipalities,
 - ü 28 districts
 - ü 6 planning regions

PRODUCTION AND MARKETING OF FRUIT BERRIES

Raspberry production

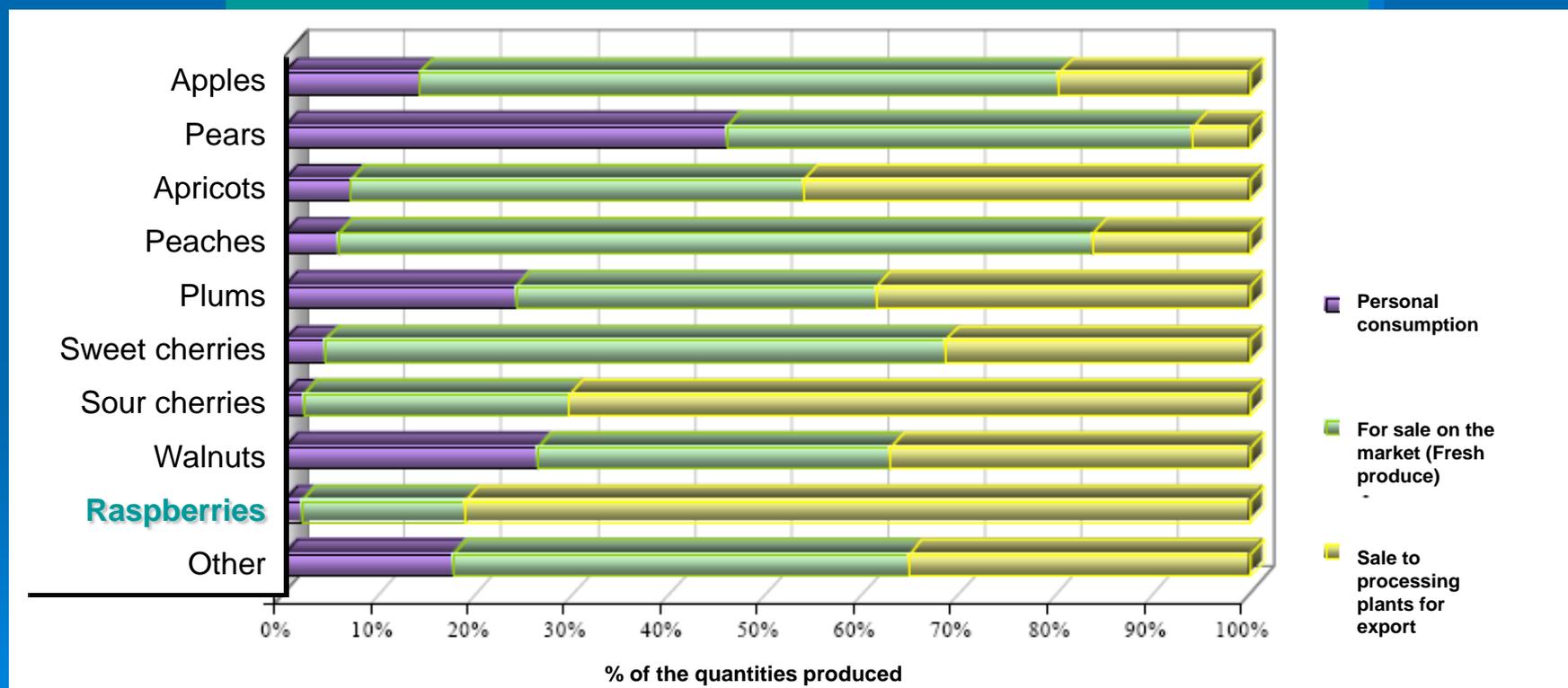
	2004	2008
Area (ha)	1 678	1 034
Production (t)	5 000	3 540

Average yields of fruit crop production in 2007 and 2008 (kg / ha)



PRODUCTION AND MARKETING OF FRUIT BERRIES

Sales of fruit production in 2008 (kg / ha)



PRODUCTION AND SALES OF BERRY FRUITS FROM BULGARIA

Exported frozen fruit production in 2009

Production Year	Quantity (t)			Value (USD)			Average price (USD / t)		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Total fruit	14678,4	9955,2	6685,2	22010560	16917612	17303384	1500	1699	2588
Raspberries / Blackberries	5561,2	3356,9	2946,2	9954904	7295402	10811288	1790	2173	3670
Strawberries	2458,3	1226,6	872,0	3348366	2370908	2133616	1362	1933	2447
Other	6659,0	5371,5	2866,8	8707290	7251302	4358480	1308	1350	1520
Sweet cherries	515,7	451,1	536,3	506158	497684	739512	982	1103	1379
November 2010 Sour cherries	873,1	1261,8	546,2	1028593	1549573	966242	1178	1228	1769

PRODUCTION AND SALES OF PROCESSED FRUITS AND VEGETABLES IN BULGARIA OBSU Q3 '2009

Production of preserved and processed fruits and vegetables Q3 '(2008-2009)

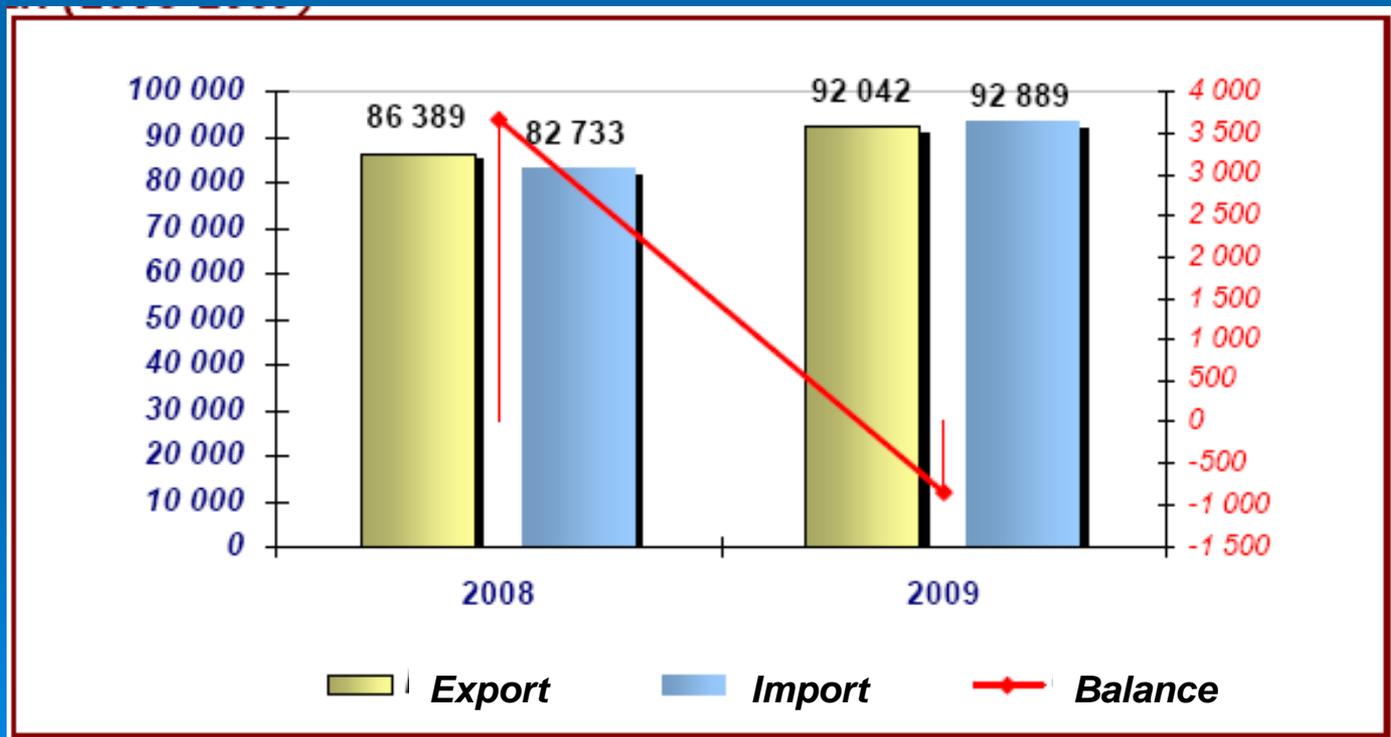
	Maß	2008	2009	Index
Preserved vegetables	t	16 889	16 250	96.2
Preserved Fruit	t	16 407	9 561	58.3
Juices	Thousands BGN	12 719	10 505	82.6

Production of preserved and processed fruits Q3 '(2008-2009)

	Measure	2008	2009	Index
Preserved fruit total	t	26 285	17 941	68.3
Fruit, raw or cooked in water or steam, TKW	t	5 240	3 670	70.0
Jams, marmalades, jellies, mousses, purees, fruit based puree	t	7 981	5 679	71.2
Otherwise processed fruits (without the "Musli") - sterilized	t	13 063	8 593	65.8

PRODUCTION AND SALES OF PROCESSED FRUITS AND VEGETABLES IN OBSU BULGARIA Q3 '2009

Import, export, exchange of goods - processed fruits and vegetables in Bulgaria, September (2008-2009)



PRODUCTION AND SALES OF PROCESSED VEGETABLES AND OBSU Q3 '2009

Import of canned fruits IX '(2008-2009)

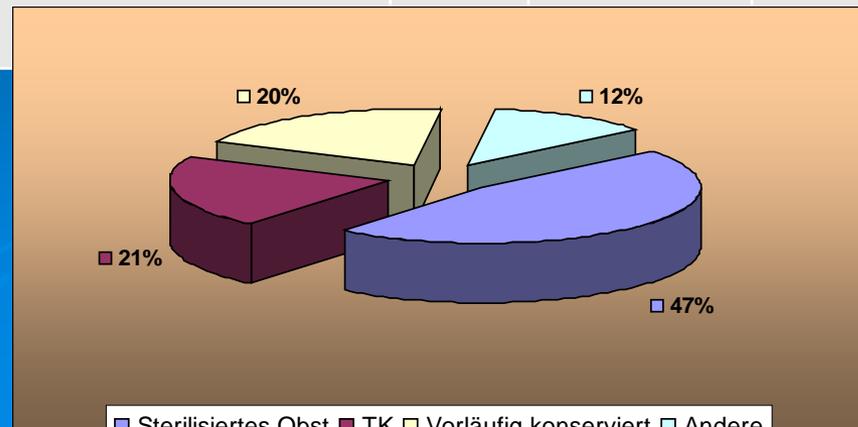
	2008		2009	
	(t)	Thousand €	(t)	Thousand €
Total	33 562	25 023	33 195	34 665
Fruit, raw or cooked in water or steam, tank truck, even with added sugar or other sweetener	466	300	258	357
Fruit, provisionally preserved for further processing	3 903	2 382	4 428	2 488
Dried fruit, mixtures of fruit or nuts	7 922	3 523	5 100	1 879
Jams, marmalades, jellies, purees, fruit based puree, processed by boiling water without adding sugar or other sweeteners	1 477	1 504	1 196	1 355
Fruits or other edible parts of plants, processed or preserved with or without added sugar, other sweeteners, or alcohol, not previously mentioned or included (sterilized)	19 793	17 314	22 213	28 586

PRODUCTION AND SALES OF PROCESSED AND VEGETABLES IN

BULGARIA OBSU Q3 '2009

Export of canned fruit IX '(2008-2009)

	2008		2009	
	(t)	Thousand €	(t)	Thousand €
Total	30 270	40 602	27 725	43 782
Fruit, raw or cooked in water or steam, tank truck, even with added sugar or other sweetener	5 166	8 600	5 678	9 566
Fruit, provisionally preserved for further processing	6 879	9 495	5 429	6 859
Dried fruit, mixtures of fruit or nuts	1 155	1 068	1 403	1 204
Jams, marmalades, jellies, purees, fruit based puree, processed by boiling water without adding sugar or other sweeteners or	5 142	4 124	2 106	2 494
Fruits or other edible parts of plants, processed or preserved with or without added sugar, other sweeteners, or alcohol, not previously mentioned or included (sterilized)	11 927	17 316	13 109	23 658



November, 2010

PRODUCTION AND MARKETING OF FRUIT TK Q3 '2009

PRODUCTION AND MARKETING OF FRUIT TK Q3 '2009

Import

- Germany, USA, France and Holland hold almost 54% of the total import of TKW fruit in the world in the third quarter of 2009
- Bulgaria, however, takes 35th Place with 0.04% of total quantity

Export

- Poland, China, Holland, USA and Germany have almost 62% of the total export of TKW fruit in the world in the third quarter of 2009
- Bulgaria takes 15th Place with 2.2% of total world exports

Quelle: *International Trade Centre*

PRODUCTION AND MARKETING OF FRUIT TK Q3 '2009

World Trade / World markets - Export of provisionally preserved fruit Q3 '2009)

Place	Country	Q3'2008	Q3'2009	Index
1.	Bulgaria	5 632	4 509	80.1
2.	China	3 804	3 615	95.0
3.	Italy	3 415	2 792	81.8
4.	Spain	2 822	2 567	91.0
5.	USA	3 267	2 019	61.8

Quelle: *International Trade Centre*

LENOX FROZEN FOOD LTD

Troyan – Dobrodan Bulgaria

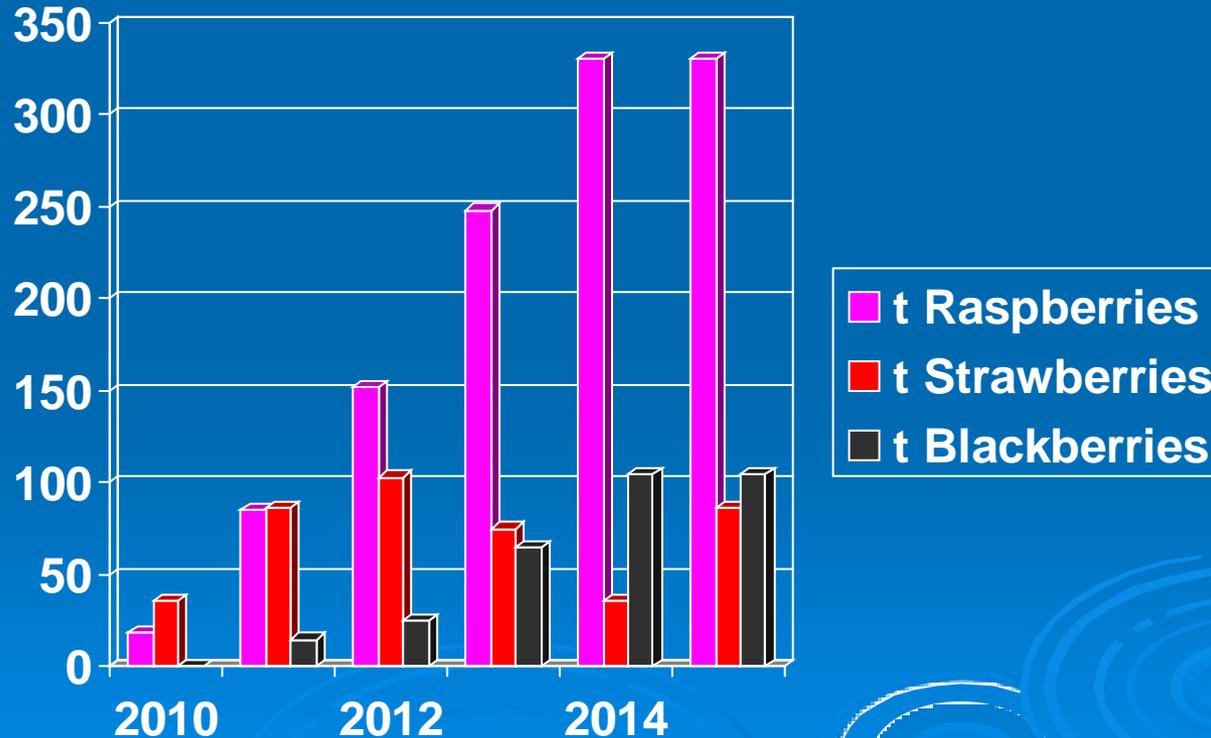
Trends & Strategic Plan 2009-2014

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Implementation by December 2010



Target harvest of fruits to ensure raw materials for production



Planted demo areas & crop per hectare by 2015

- Ø Raspberries 30 ha - 11 t per ha
- Ø Strawberries 8 ha - 11 t per ha
- Ø Blackberries 7 ha - 15 t per ha

Tools needed to create a production system in FROZEN FOOD



Targets of the technology of planting

New targets

- In accordance with European trends
- Adjustment to the Bulgarian conditions
- Approach oriented to the main points



Soil fertility

- ∅ preceding crops
- ∅ stockpiling of soil humus
- ∅ proper rotation of perennial soil treatments
- ∅ optimum soil structure via better aeration



Quality of planting material annual plants from the nursery Import (F)



- ∅ well-developed root mass
- ∅ stolons with well-developed nodes of sprouting
- ∅ preconditions for good crops of Heritage planted in early spring 2010, that will result in full crop in 2011

Development of technology

- ∅ Planting at high beds

Photo 10/09

Terms of planting

May/Juni 2009 –
container plants

- ∅ Obtain **full
production** 10 / 10



Planting at high beds BG version 1



November, 2010

Planting at high beds BG version 2

- ∅ cover the high beds with constant Meypex Folio
- ∅ Stuck with wire staples
- ∅ Open strip for roots management



Effects of higher planting beds

- ∅ Regulation of planting depth
- ∅ Soil aeration
- ∅ Soil moisture by soil cover evenly while destroying weeds
- ∅ Preserve the soil structure without hardening in drought
- ∅ Prevent flooding during periods of high rainfall

Necessary support for project implementation

- ∅ Information and experience exchange on various technical levels
 - regional (Institute Troyan, producers)
 - country (Experimental stations, leading producers)
 - international (Serbia, Germany, Swiss)
- ∅ external consultation and concepts development (permanently or under the plan)









High quality raw material at high price



November, 2010



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High effective and quality processing- competitive finished pruduct



November, 2010



November, 2010

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∅ Dear Participants,
Thank you very much for your attention

MR B.Petkov- Manager
Lenox Frozen Food Ltd, Bulgaria