



AGRICULTURAL UNIVERSITY PLOVDIV BULGARIA

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***Review of some agrostatistical indicators
of Bulgarian vegetable production in the
context of common agricultural policy***

Teodora Stoeva



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The aim of this publication is to show the influence of some basic agrostatistical indicators over the status and dynamics of vegetable production as well as to reveal the basic trends in this important agricultural subsector.

From the crucial 1989, price liberalization, foreign trade and private initiative have put Bulgarian agriculture in a fundamentally different business environment. In comparison to European agricultural policy of the EU, the mechanisms of Bulgarian agricultural policy are not sufficiently well developed.

Advantages of Bulgarian production

- favourable soil and climatic conditions
- rich experience and traditions in vegetable growing
- high scientific potential and availability of a specific genotype of local crops and varieties
- good opportunities for creating jobs in underdeveloped rural areas
- creation of good conditions for organic vegetable production

- For the period 2002-2011 its share in plant-growing and in agricultural sector as a whole, decreased by 76%.
- For the same period the areas harvested with vegetables decreased by 61%.
- The import of certain crops at relatively low prices from neighboring countries such as Turkey and Greece where the weather is more favorable almost throughout the whole year, adds additional pressure on Bulgarian production.

Factors

- lack of sustainable financial resources for improving and modernising production
- poor condition of the irrigation equipment and infrastructure
- low-skilled workers
- constant competition of imported products which suppress domestic production.

Factors responsible for the economic conditions

- the prevailing unfavourable trend for reduction of agricultural lands . from 2000 to 2007 the usable agricultural area (UAA) decreased with 465.8 thousand hectares, including arable land which decreased with 219.6 thousand hectares

the predominant number of small farms (more than 70 % of the farms are under 1 hectare) and insufficient resource security put serious limits to the possibilities for the efficient use of production factors;

shortage of financial resources . due to the fact that agricultural production is deemed to be high risk, commercial banks refrain from lending



- Now, the production of vegetables is far below the level of the years till 2008, when it reached the value of and above 1 billion BGN.
- In 2011 a total of 103.1 thousand tons of tomatoes were produced, which was 10% less than in 2010.
- The reduction of cabbage production was 43.4% in comparison to 2010.
- There was a serious reduction in egg-plant production . with about 37%.

- The lower average yield per hectare in 2011 for all major vegetable crops grown in open areas was due to non-observance of the technologies for their cultivation by farmers, many of whom use their own seeds for production because of the high prices of certified commercial vegetable seeds.
- Of the vegetables produced in 2011, 81.1% were realized and 72.2% of them were intended for the market.
- Vegetables delivered to processing factories were 9.7% of the total production for the year as carrots, pepper and tomatoes having the largest share.

- In 2011 a Fruit and Vegetable Index was made.
- 15 goods from the group of Bulgarian fruits and vegetables and of those imported were included in it.
- The vegetables included in this index were: Bulgarian potatoes and imported potatoes, onion, garlic, greenhouse tomatoes and imported tomatoes, greenhouse cucumbers and imported cucumbers, green pepper, cabbage, etc.
- The analysis of wholesale prices of vegetables in 2011 shows:
 - The prices preserve their characteristic feature to decrease during spring and summer and to increase in autumn and winter;
 - Comparative analysis of prices in recent years has illustrated the strong influence of climatic factor, which leads to frequent fluctuations in both directions depending on the specific weather conditions;

- On the other hand, Bulgarian vegetables are uncompetitive due to the high VAT imposed on agricultural production in Bulgaria . 20%. For comparison, agricultural production in European countries is taxed with 7-9% VAT.
- In the years of transition Bulgaria has lost its place as a leading manufacturer and exporter of vegetables to other European countries and vegetable industry has suffered a sharp decline.

- With the accession of our country to the European Union in 2007, agricultural sector and vegetable industry in Bulgaria in particular faced a number of challenges.
- Traditional Bulgarian production of vegetables has become a lagging production with a negative balance.
- Strong competition of imported products which are cheaper as well as illegal imports from neighboring countries further presses Bulgarian production.

- Vegetable growing is a specific agricultural activity and its improvement should be a priority in the strategy of Bulgarian agriculture.



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