

Voluntary Report – Voluntary - Public Distribution

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Report Name: Oilseeds and Products Update

Country: Bulgaria

Post: Sofia

Report Category: Oilseeds and Products

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Report Highlights:

Following the conclusion of Bulgaria's MY 2020/21 sunflower harvest in late October, the Ministry of Agriculture (MinAg) reported lower than expected yields and production. Post revises its sunflower production estimate downward to 1.7 million metric tons (MMT). Post also reduces its total MY 2020/21 rapeseed production estimate to 270,000 metric tons (MT) based on final post-harvest data. The fall 2020 planting season for MY 2021/22 rapeseed was delayed due to dry conditions. The rapeseed area planted is forecast down by over 20 percent from MY 2020/21. Although planting challenges may negatively affect the size of the winter rapeseed crop, it may increase the spring crop area in 2021.

Weather Overview

Warm and dry summer weather persisted during the first three weeks of September, which were the warmest on record since 1979. Despite the generally dry conditions, limited precipitation during the first five days of September and also after October 5, reached 60-100 mm in northern Bulgaria, while southern regions received 40-70 mm. Dry weather conditions facilitated the sunflower harvest in September. Conversely, fall 2020 rapeseed planting has been hampered. Dry conditions also hindered rapeseed emergence and early crop development, although soil moisture levels improved in October (see Maps 1-3, [Crop Explorer](#) and [Bulgaria data](#)).

MY 2021/22 Forecast

As of October 30, MinAg reported the rapeseed area planted at 102,000 hectares (HA), an eight percent decline from the same time last year. MinAg's first data about the fall 2020 planting season were released in late September and showed only 21,000 HA had been planted as of September 24. Post estimates the rapeseed area planted as of the first week of November at 115,000 HA, down from last year's 150,000 HA planted by the same time. Since about 80 percent was planted after the peak planting season, yields may be negatively affected. Post's early MY 2021/22 crop forecast is projected at 230,000 MT. The lower rapeseed area planted is likely to increase the 2021 spring crop area, particularly for sunflower.

MY 2020/21 Estimates

Based on final harvest data, Post revises its rapeseed production estimate down to 270,000 MT (2.35 MT/HA) (Table 1). Eurostat's current rapeseed production forecast is at 260,000 MT.

As of October 30, 99.8 percent of sunflower was harvested, per MinAg data. Reported average yields are 2.03 MT/HA, a 12-percent decline from last year, due to the hot and dry weather. Production is reported at 1.65 MMT, a four-percent decline from the same period in MY 2019/20. Most private yield estimates are around 2.0 MT/HA, Eurostat's sunflower estimate is 1.66 MMT. Based on final official and private data, Post revises its production estimate to 1.7 MMT.

The high-oleic sunflower production has increased this year. There are no official data about different sunflower varieties, however most private estimates indicate that the high-oleic sunflower area at 150,000 HA and production at 300,000 MT to 330,000 MT. Post expects most high-oleic sunflower production will be exported.

Bulgaria's soybean harvest was completed in late October. See Table 1 below for more information.

Oilseeds and Products Trade

Rapeseed: Early season MY 2020/21 rapeseed exports are lower due to the smaller crop. As of October 30, MinAg reported exports at 176,000 MT, down from 318,000 MT exported during the same period in MY 2019/20. All exports were destined for other EU markets.

Sunflower: MY 2019/20 sunflower trade data as of July (Trade Data Monitor (TDM) based on Eurostat) shows record-high imports at 636,000 MT, mainly from Russia, Moldova, and Romania to meet the crush demand of expanding processing capacities. This is almost triple the level of imports in MY 2018/19 (224,000 MT). Sunflower exports during this period were 761,000 MT, a 25-percent increase over MY 2018/19.

Higher domestic crush resulted in growing exports of processed products. Exports of sunflower oil through July 2020 were 432,000 MT, 24 percent above the same period in MY 2018/19 (348,000 MT), mainly to South Africa, Greece, Spain, Italy, Morocco, and Turkey. Exports of sunflower meal were at 478,000 MT, an 11-percent increase over MY 2018/19, to the Netherlands, France, the United Kingdom, Greece, Turkey, and Egypt.

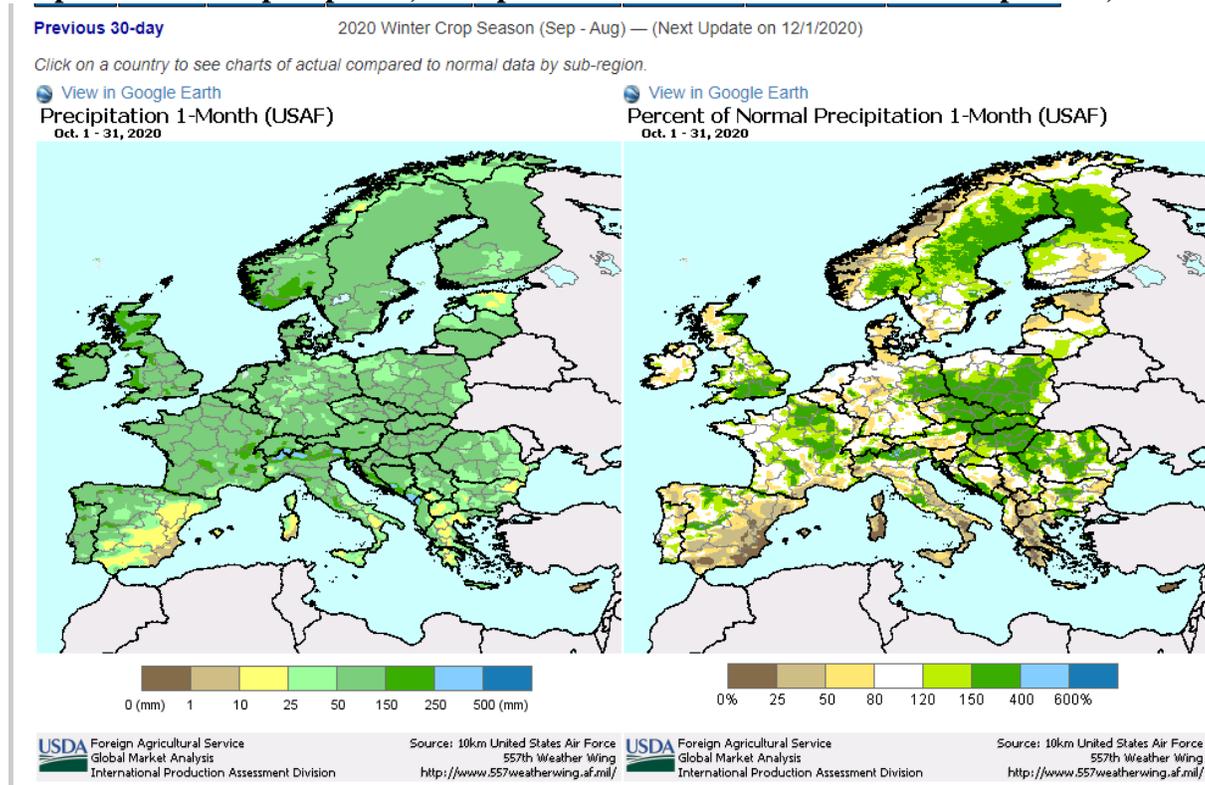
MY 2020/21 started with lower beginning stocks due to domestic consumption growth and exports in the previous season. Because of the shorter crop and smaller stocks, exports through the end of October reached a record low of 32,000 MT, down from 154,000 MT exported during the corresponding period last year (source: MinAg weekly bulletins). Conversely, domestic consumption has grown to 335,000 MT, a 29-percent increase over MY 2019/20. Post expects that this MY may mark a turning point for when Bulgaria becomes a net sunflower importer.

Appendix:

Table 1: Post MY 2020/21 Estimates for Major Oilseeds as of November 2020

Crops	Area Harvested, HA	Production, MT
Soybeans	4,000	8,500
Rapeseed	115,000	270,000
Sunflower	810,000	1.7 million

Map 1: USDA Crop Explorer, Precipitation and Percent of Normal Precipitation, October 2020



Map 2: USDA Crop Explorer, Surface and Subsurface Soil Moisture, October 23-25, 2020

Previous 7-day 2020 Winter Crop Season (Sep - Aug) — (Next Update on 11/2/2020)

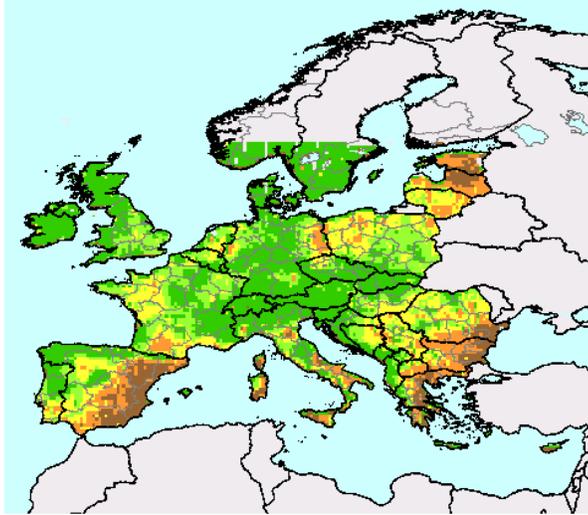
Click on a country to see charts of actual compared to normal data by sub-region.

[View in Google Earth](#)

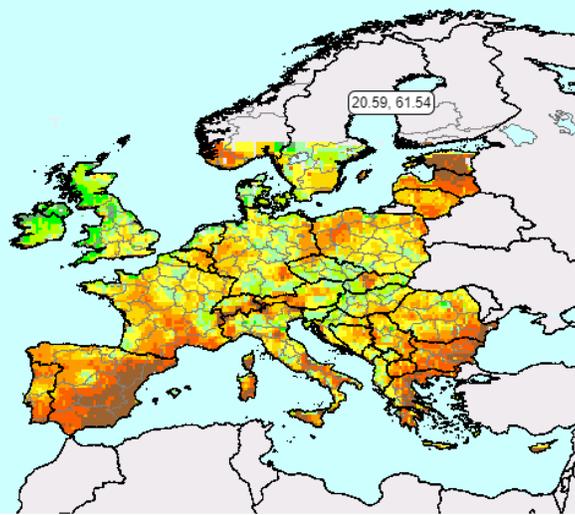
Surface Soil Moisture (SMAP)
Oct. 23 - Oct. 25, 2020

[View in Google Earth](#)

Subsurface Soil Moisture (SMAP)
Oct. 23 - Oct. 25, 2020



0 (mm) 5 10 15 20 25.4 (mm)



0 (mm) 25 50 75 100 125 150 175 200 (mm)

USDA Foreign Agricultural Service
Global Market Analysis
International Production Assessment Division

Source: 2-layer Palmer Soil Moisture Model
(corrected with SMAP imagery)
NASA/GSFC/HSB; USAF 557th WW

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Map

3: Europe, Percent of Soil Moisture, October 23-25, 2020

[Previous 7-day](#)

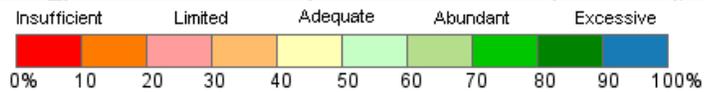
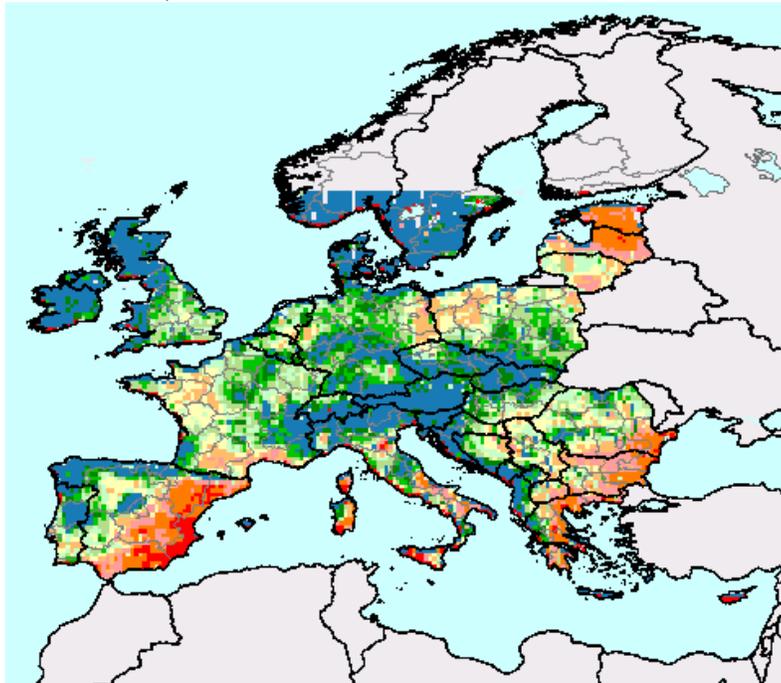
2020 Winter Crop Season (Sep - Aug) —

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Percent Soil Moisture (SMAP)

Oct. 23 - Oct. 25, 2020



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Global Market Analysis
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Source: 2-layer Palmer Soil Moisture Model
(corrected with SMAP imagery)
NASA/GSFC/HSB; USAF 557th WNW

Attachments:

No Attachments.