



CENTER FOR AGRI-POLICY ANALYSIS (CAPA)

INSTITUTE OF AGRICULTURAL ECONOMICS - SOFIA



10 YEAR CAP IN BULGARIA AND FUTURE POLICY INSIGHTS

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Meeting “SCAR CASA National meeting” - Bulgaria,
28 February 2018



CONTENT OF THE PRESENTATION

1. Effects and impact of the CAP implementation in Bulgaria
 - Direct Payments Scenarios focusing on GAO, GAV, IC
 - Changes in agricultural industry pattern
 - Investment support and farm consolidation – the middle size farms at stake
2. CAP Proposal of the Scientific Society in the NAF – CAP Post 2020
 - Vision and Priorities
 - Insights on I and II Pillars

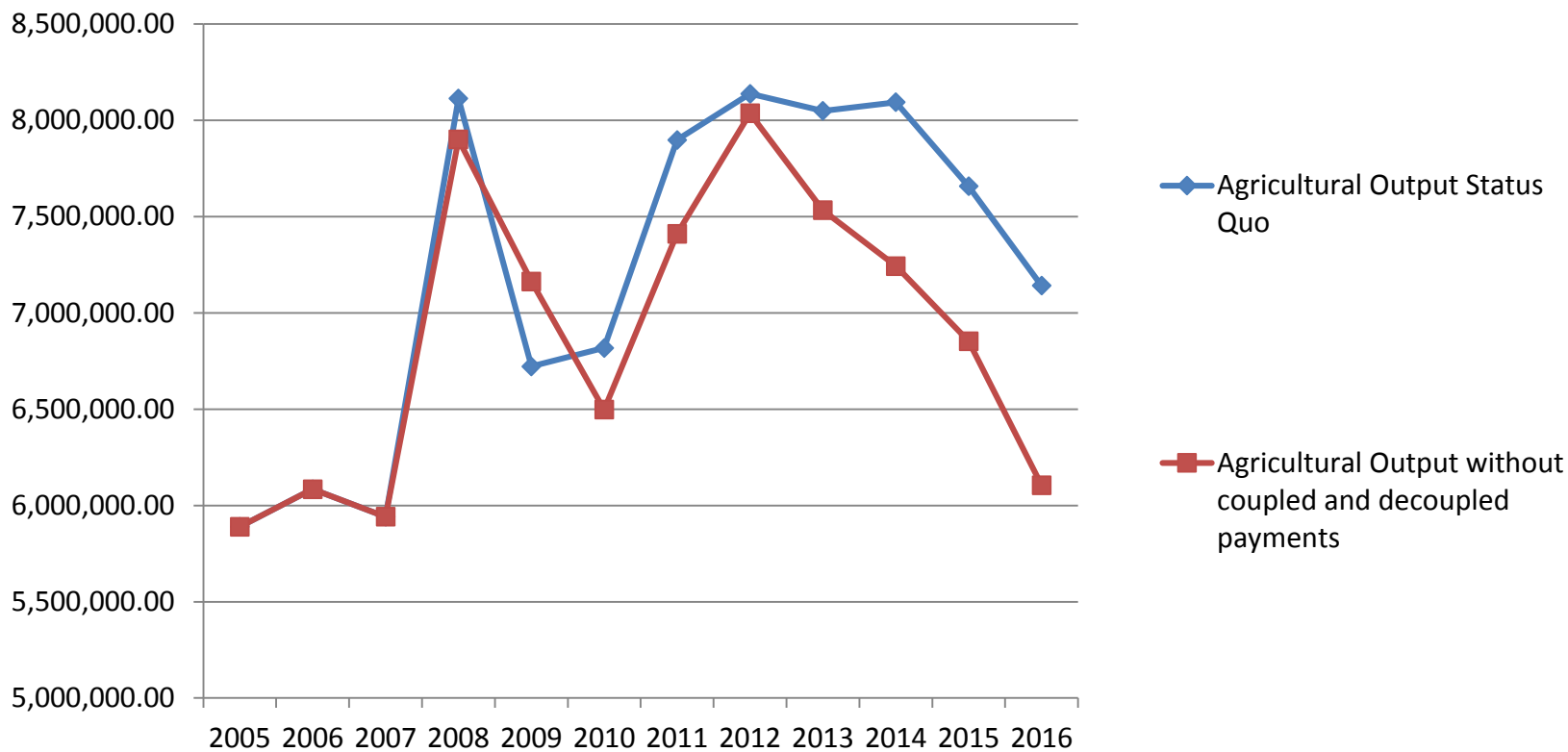


Distribution of Direct Payments

DP Topic/Schemes	2007 - 2013	2014 - 2020
Total I Pillar envelop (billion euro)	€2,5	€5,3
SAPS / BP	97%	45%
Top-ups support / National transitional support (Billion €)	€0,6	€0,3
Greening	No	30%
VCS	3%	15% (13% + 2%)
YFS	No	0.5%
SFS	No	Yes (€500/ha)
Redistributive Payment	No	7,9% (€76/ha)

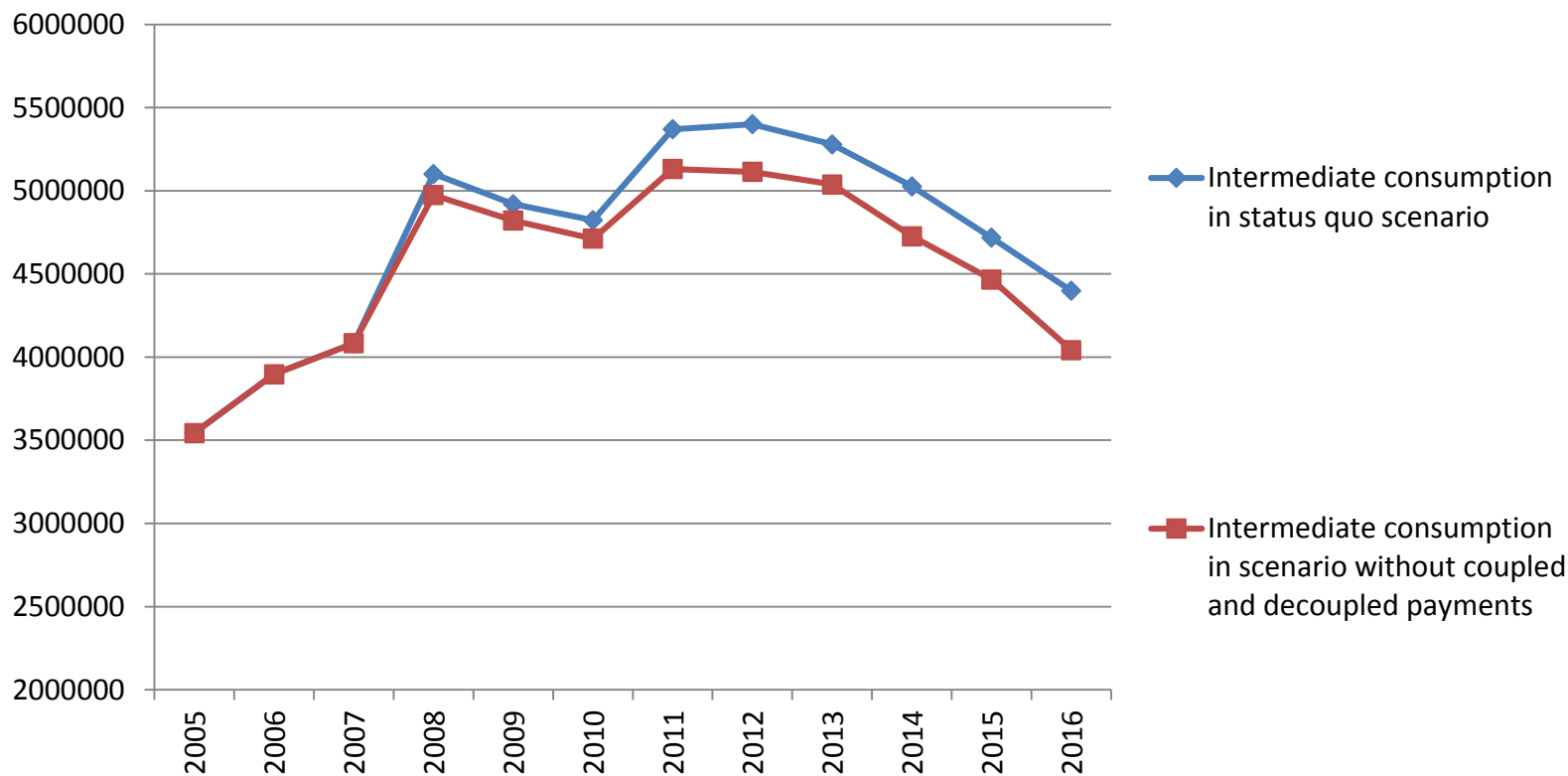
Source: Payment Agency

Gross Agricultural Output - Status Quo and None DP, 000 BGN



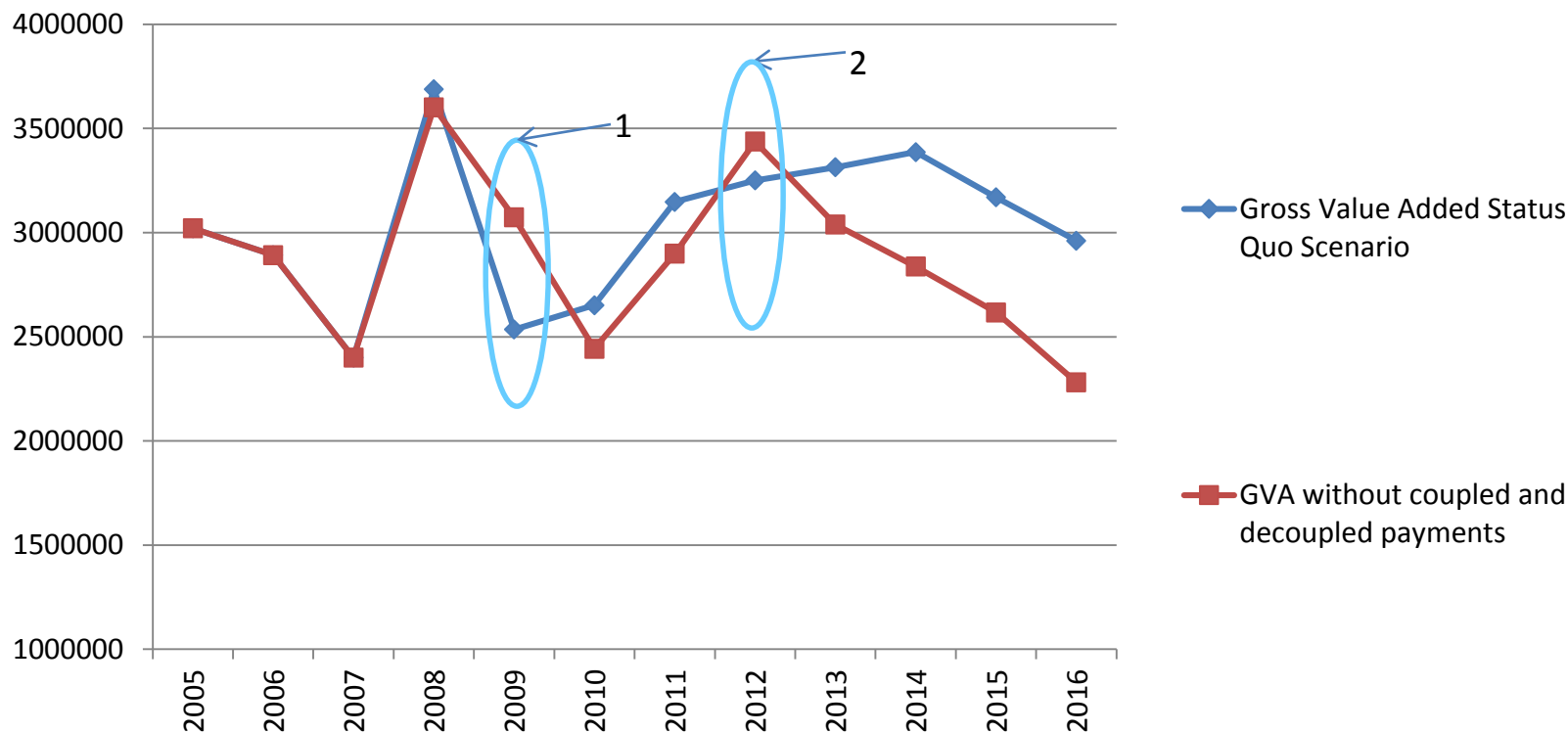
Source: CAPA, NSI data

Production Costs - Status Quo and None DP, 000 BGN



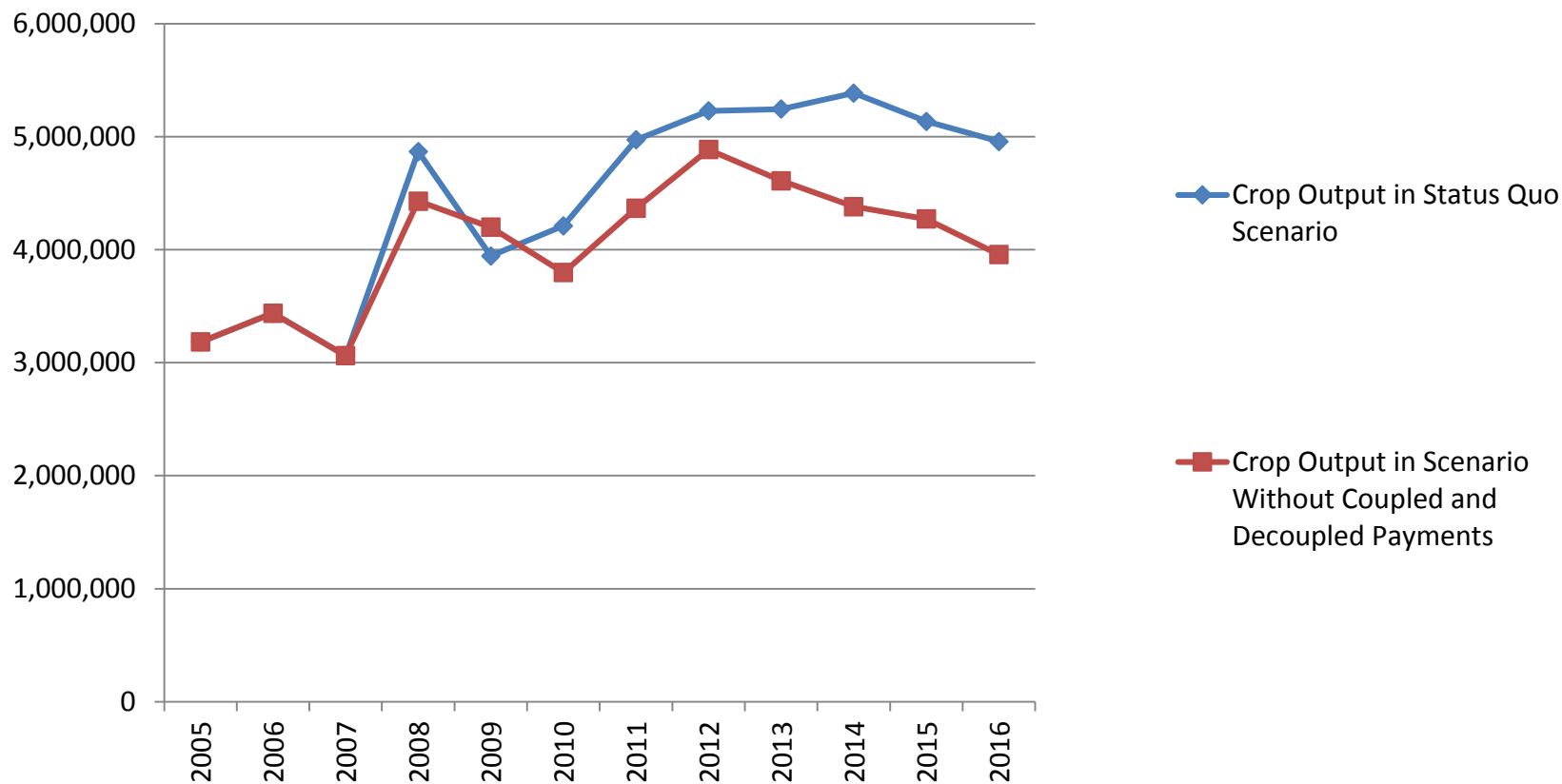
Source: CAPA, NSI data

Gross Value Added - Status Quo and None DP, 000 BGN



Source: CAPA, NSI data

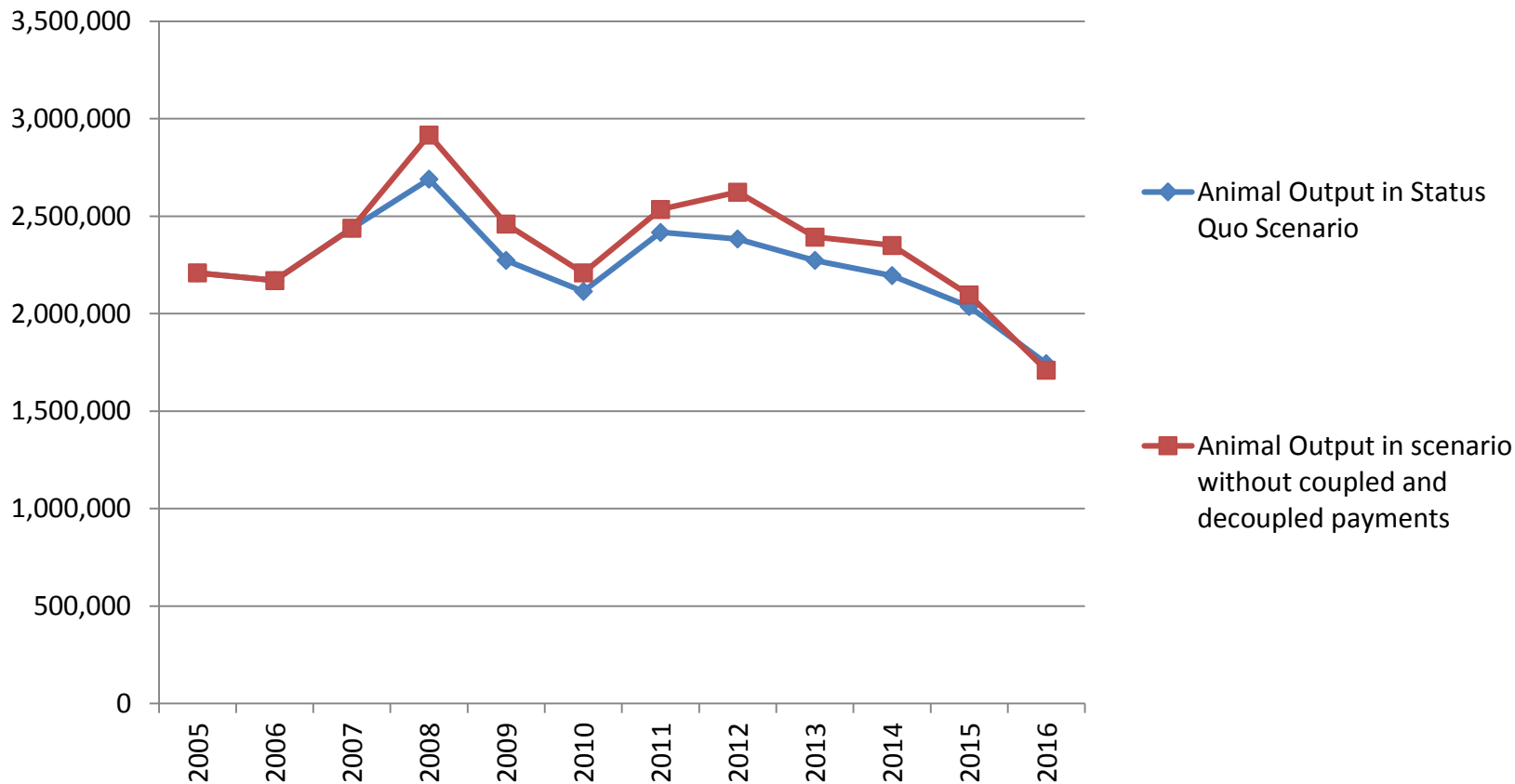
Crop Output - Status Quo and None DP, 000 BGN



Source: CAPA, NSI data

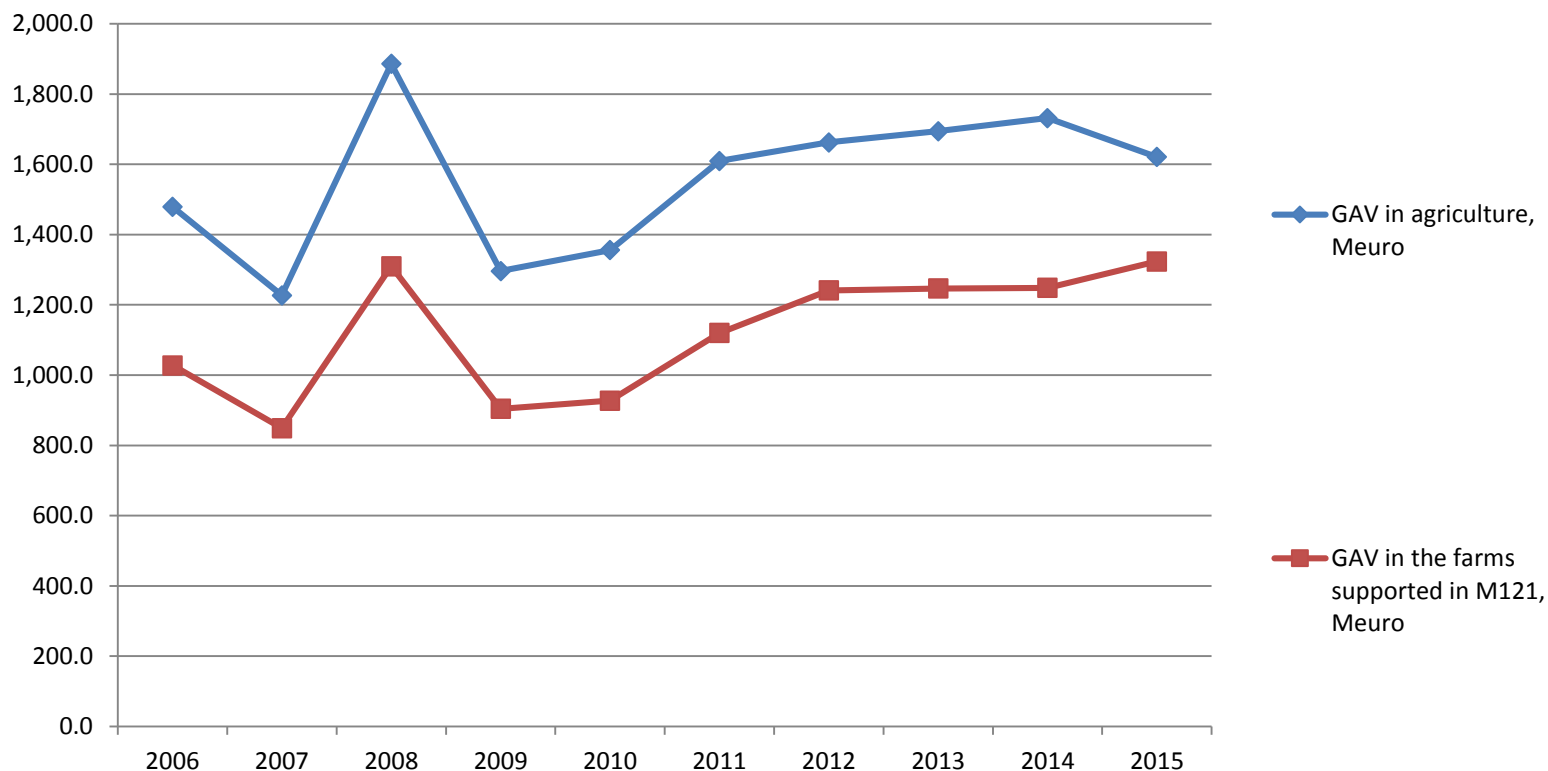


Livestock Output - Status Quo and None DP, 000 BGN



Source: CAPA, NSI data

GAV in the entire agriculture and created by investment measures, MEUR



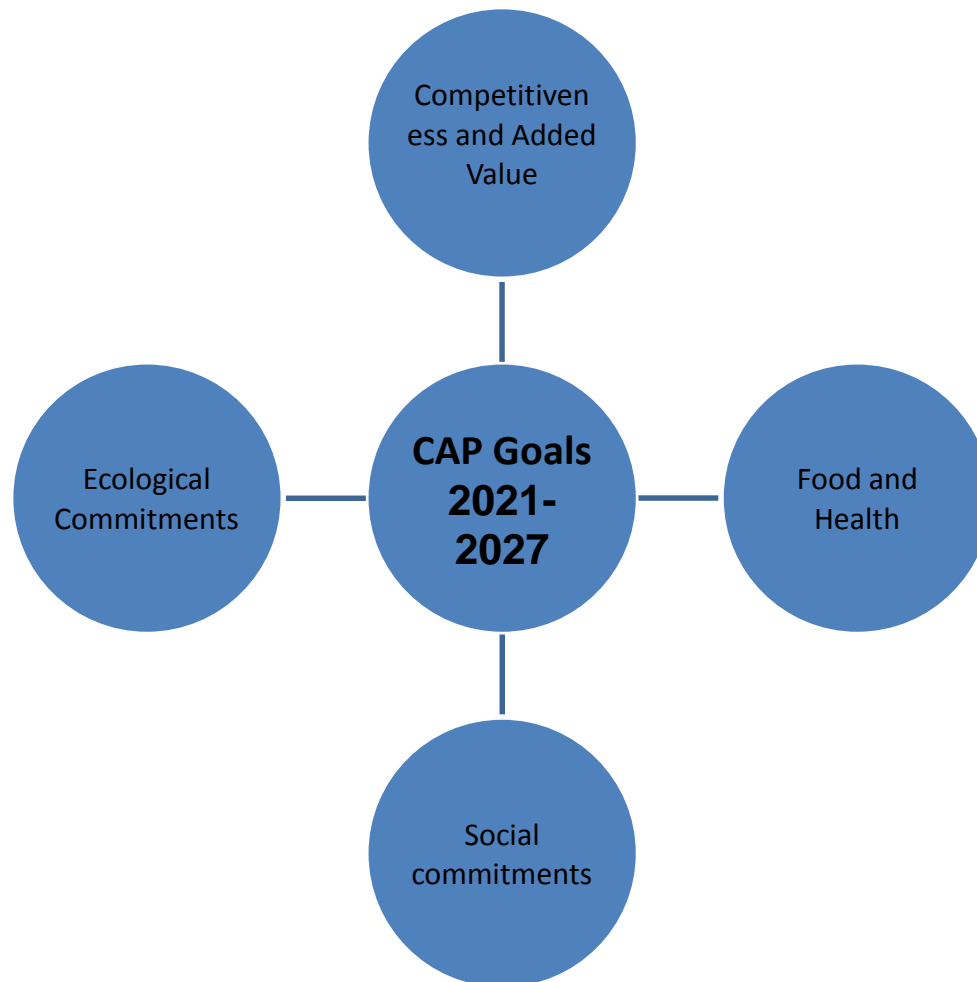
Source: Payment Agency



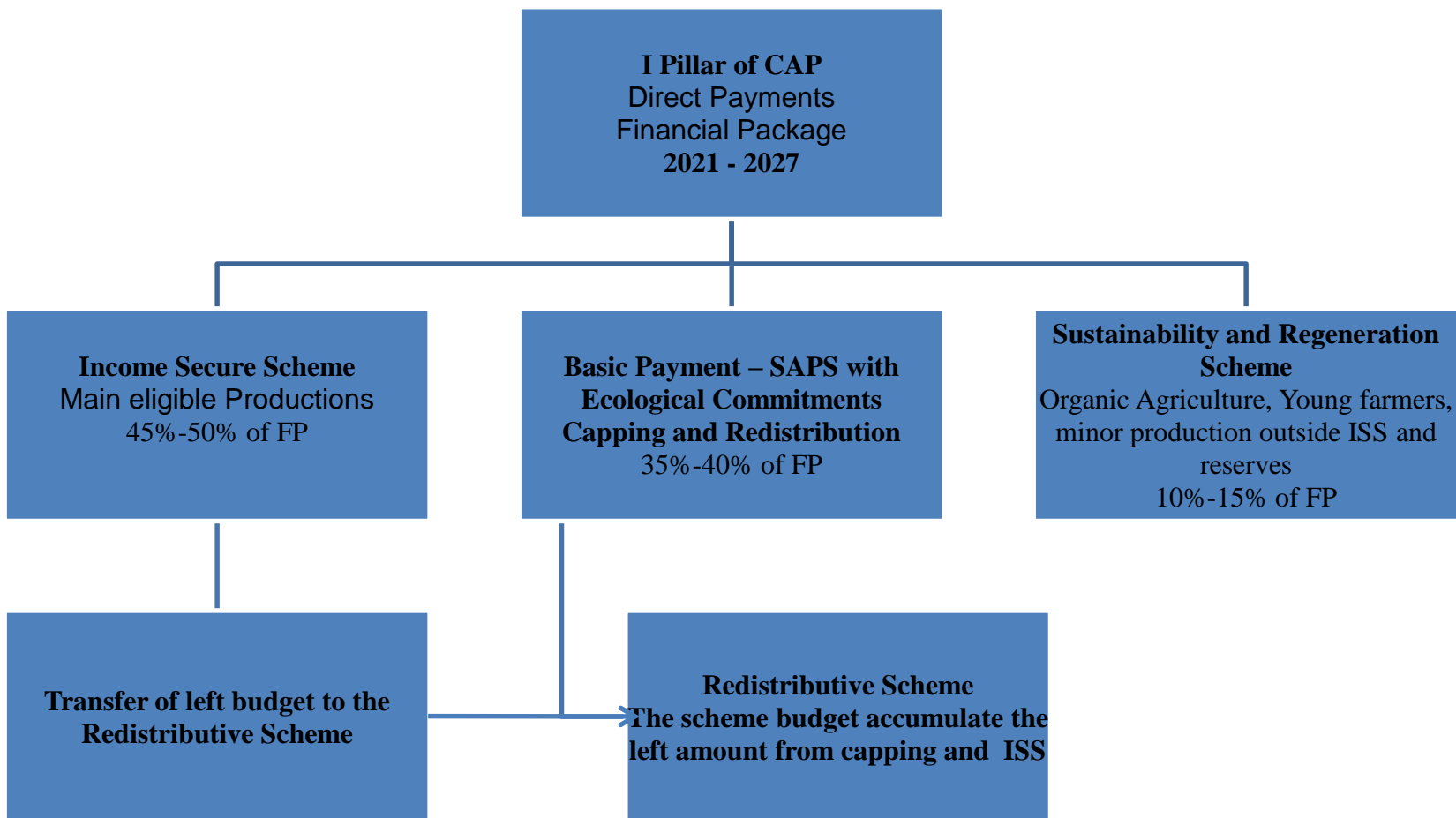
CAP Post 2020

GOAL: Competitiveness and added value increase through providing qualitative and healthy food considering social and ecological aspects of farming

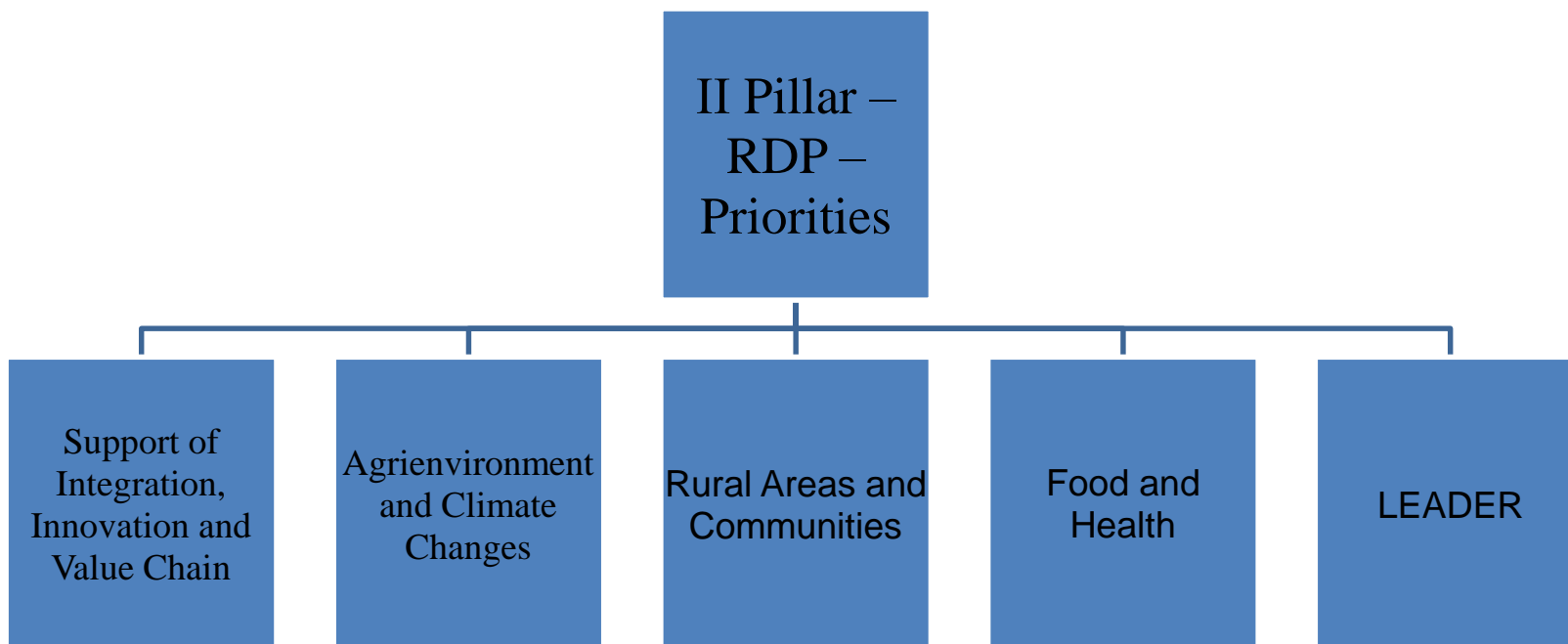
- Policy flexibility; common budget – various ways
- Reforms against decent and adequate CAP budget
- I Pillar – switching from farm's income support to income secure
- Capping linked to employment instead of administrative regulation
- II Pillar – rural men in the centre rather than infrastructure, broadband Internet, etc.



I Pillar Framework



II Pillar Priorities





General conclusions

1. Continuing a Common Policy oriented into results
2. Adequate CAP budget to save the balanced and family feature of EU agriculture
3. Decoupled SAPS support is not efficient and must be re-considered in CAP Post 2020
4. Vital integration of the agri-businesses
5. Innovations - integrated Agribusiness and Research organizations by public support



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THANK YOU FOR YOUR ATTENTION!

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