

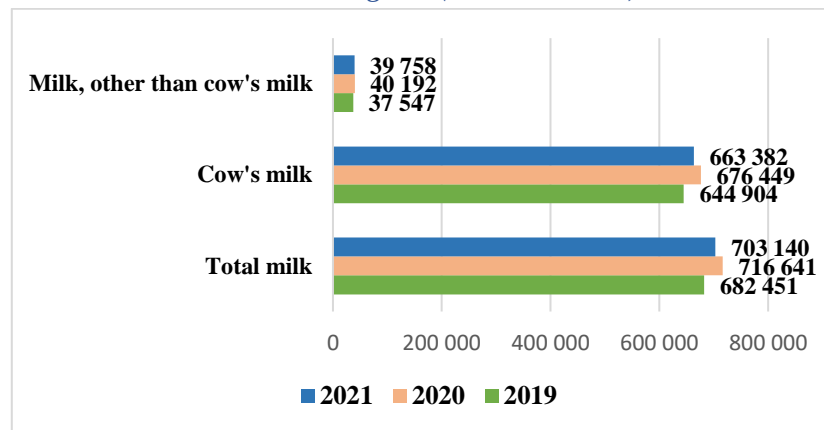


Activity of the dairies in Bulgaria 2021

244 dairies (milk processors) provided data on milk processing and manufactured milk products in 2021. They processed 703 million litres of raw milk (including deliveries from EU member states and imports from third countries). Processed cow's milk dominates (94.4%), with 1.9% less compared to 2020. In 2021, ewe's milk takes second place (with a share of 3.4%). Goat's milk occupies 3.4% of processed milk and is 7.8 % more compared to 2020. Processed buffalo's milk and mixed milk is 0.6% of the total milk.

Figure 1

Processed milk in Bulgaria (thousand litres)



Source: Ministry of Agriculture, Agrostatics Department, Activity of the dairies in 2021

Table 1

Quantities of processed milk declared in 2019, 2020 and 2021, deliveries from EU member states and imported from third countries incl.							
Type of milk	2019		2020		2021		Change 2021/2020 (%)
	Quantity (thousand litres)	Share of processed milk (%)	Quantity (thousand litres)	Share of processed milk (%)	Quantity (thousand litres)	Share of processed milk (%)	
Cow's milk	644 904	94.5%	676 449	94.4%	663 382	94.4%	-1.9%
Ewe's milk	23 496	3.4%	25 318	3.5%	24 109	3.4%	-4.8%
Goat's milk	9 291	1.4%	10 413	1.5%	11 228	1.6%	7.8%
Buffalo's milk, mixed milk and cream	4 760	0.7%	4 461	0.6%	4 421	0.6%	0.0%
Total:	682 451	100%	716 641	100%	703 140	100%	-1.9%

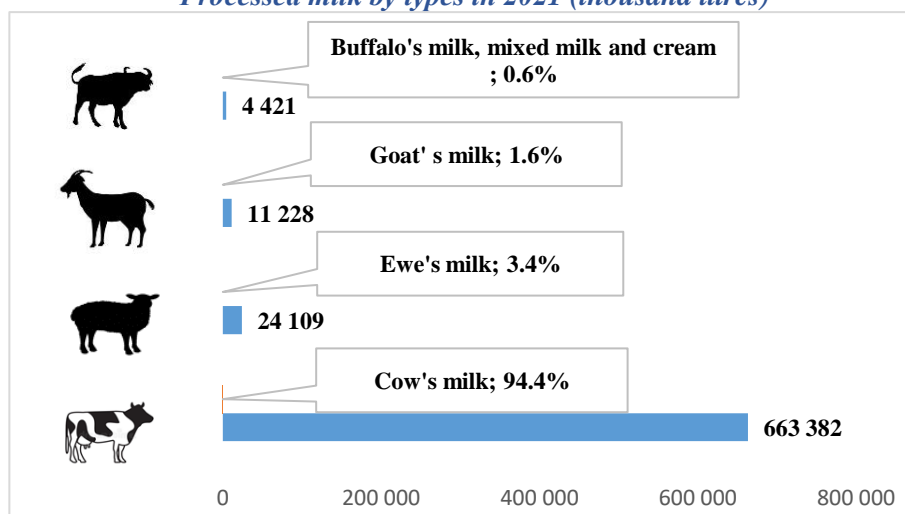
Source: Ministry of Agriculture, Agrostatics Department, Activity of the dairies in 2021

In 2021, according to data provided by milk processing enterprises, in addition to the amounts of raw milk by type indicated in Table 1, including imports from EU member states and from third countries, there is extra 3 121 tons of concentrated milk input in the dairy products, 7 497 tons of milk powder and cream powder, 4 709 tons of milk concentrate* and 930 tons of other products (cream, leaven, whey). The processed quantities of raw milk delivered by EU member states or imported from third countries are over 20 thousand tons in total.

*milk concentrate – material, obtained by concentrating milk protein by ultrafiltration of milk, semi-skimmed milk or skimmed milk.

Results and analyses

Figure 2
Processed milk by types in 2021 (thousand litres)



Source: Ministry of Agriculture, Agrostistics Department, Activity of the dairies in 2021

Table 2

Dairy enterprises - Legal status 2021			
Legal status	Number	Quantities of processed milk, deliveries from EU member states and imported from third countries incl. (thousand litres)	Share of the total processed milk quantity
Sole trader (ST)	34	32 139	4.6%
Companies	203	669 741	95.2%
Other status	7	1 260	0.2%
Total:	244	703 140	100%

Source: Ministry of Agriculture, Agrostistics Department, Activity of the dairies in 2021

The number of dairies (Table 2) owned by sole traders decreases in 2021 with 1.0 %. They processed 4.6% of the milk. The processed milk from dairies with legal status – companies is 95.2% of the total processed milk.

Table 3

Average fat and protein content in processed raw milk in 2021		
Type of milk	Milk fat content	Milk protein content
Cow's milk	3.62%	3.21%
Ewe's milk	6.34%	5.12%
Goat's milk	3.62%	3.25%
Buffalo' milk	6.89%	4.25%

Source: Ministry of Agriculture, Agrostistics Department, Activity of the dairies in 2021

8 146 is the number of persons employed under an employment contract in the 244 dairy enterprises on 31.12.2021.

In 2021 the total value (VAT excl.) of sold milk products by the dairies is 1.068 billion BGN, which is 3.6% less than in 2020.

Table 4

Processed milk, internal deliveries by statistical regions in 2020 and 2021 (thousand litres)					
Statistical region	2020		2021		Change total milk 2021/2020
	Total milk quantity	cow's milk incl.	Total milk quantity	cow's milk incl.	
Severozapaden	67 735	64 073	63 737	60 326	-5.9%
Severen tsentralen	165 326	158 984	165 894	160 670	0.3%
Severoiztochen	68 810	63 094	63 063	57 383	-8.4%
Yugoiztochen	91 055	85 951	90 382	85 163	-0.7%
Yugozapaden	57 666	56 034	54 901	53 239	-4.8%
Yuzhen tsentralen	249 356	232 580	244 714	228 726	-1.9%
Bulgaria	699 948	660 716	682 691	645 507	-2.5%

Source: Ministry of Agriculture; Agrostistics Department, Activity of the dairies

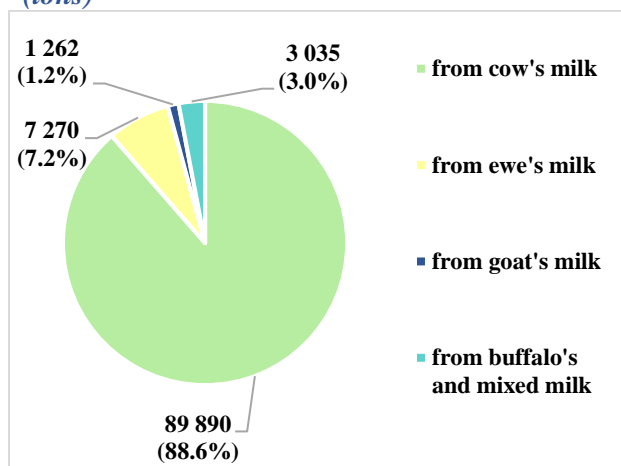
Table 5

Dairy processors in 2021 and dairy products by type of milk							
Products for consumption	Production 2020	Production 2021			Product quantity Change 2021/2020		
	Quantity	Quantity	Share of each product in the product group (%)	Number of dairies		Average production	
Drinking milk (thousand litres)	74 834	75 265	100%	55	1 368	0.6%	
Cream – fresh or sour (tons)	2 906	3 572	100%	31	115	22.9%	
Natural yoghurt – (tons)	from cow's milk	155 213	157 665	99.0%	122	1 292	1.6%
	from ewe's or mixed milk	966	1 176	0.7%	28	42	21.7%
	from buffalo's milk	318	422	0.3%	14	30	32.7%
	Total:	156 497	159 263	100%	131	1 216	1.8%
Flavoured yoghurt (with or without additives), milk desserts and milk based drinks (tons)	13 856	15 269	100%	18	848	10.2%	
Cheese (tons)	from cow's milk	90 897	89 890	88.6%	219	410	-1.1%
	from ewe's milk	7 207	7 270	7.2%	73	98	0.9%
	from goat's milk	1 295	1 262	1.2%	46	26	-2.5%
	from buffalo's milk and mixed milk	3 988	3 035	3.0%	55	56	-23.9%
	Total:	103 387	101 457	100%	223	455	-1.9%
Processed and smoked cheese (tons)	1 600	1 723	100%	27	64	7.7%	

Source: Ministry of Agriculture; Agrostistics Department, Activity of the dairies in 2021

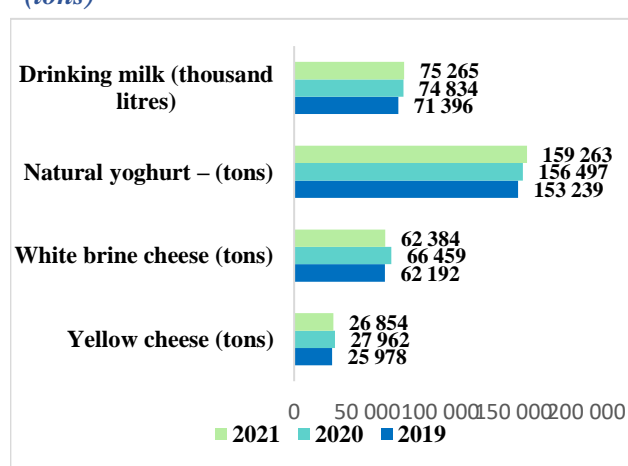
Basic dairy products in 2021

Figure 3
Cheese production by type of milk (tons)



Source: Ministry of Agriculture, Agrostatics Department, Activity of the dairies in 2021

Figure 4
Basic dairy products in Bulgaria (tons)



Source: Ministry of Agriculture, Agrostatics Department, Activity of the dairies in 2021

In 2021 the production of natural yoghurt decreased 1.8% compared to 2020 (159 263 tons).

The most significant increase is observed in the production of natural yoghurt, obtained from buffalo's milk – 32.7%, ewe's and mixed milk – 21.7%. Yoghurt from cow's milk has the largest share with 99.0%

Flavoured yoghurt (with or without additives) are more than 2020 (10.2%) and they are 15 269 tons.

Cheese production decreased 1.9% in comparison with 2020. Cheese from cow's milk accounted for 88.6%, followed by cheese obtained from ewe's milk – 7.2% (Table 5).

Production of basic dairy products by statistical regions (NUTS 2)

Table 6

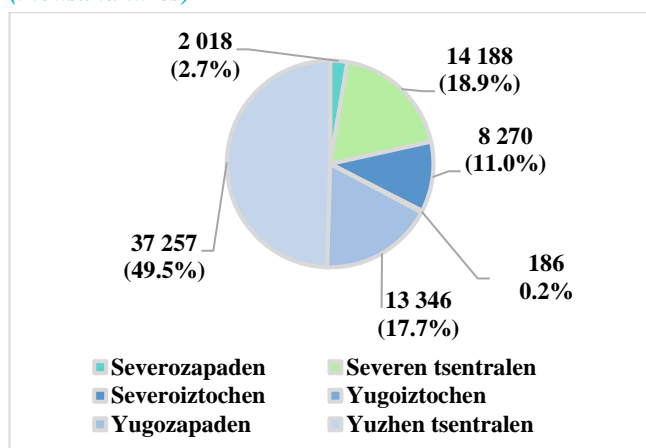
Production of basic dairy products by statistical regions (NUTS 2)							
Dairy production	Severo-zapaden	Severen tsentralen	Severen tsentralen	Severen tsentralen	Severen tsentralen	Yuzhen tsentralen	Bulgaria
Drinking milk (thousand litres)	2 018	14 188	8 270	186	13 346	37 257	75 265
Natural yoghurt – (tons)	11 214	46 362	13 581	7 556	16 410	64 140	159 263
White brine cheese (tons)	6 207	21 917	7 561	4 998	2 772	18 929	62 384
Yellow cheese (tons)	2 172	4 804	963	7 253	682	10 980	26 854

Source: Ministry of Agriculture, Agrostatics Department, Activity of the dairies in 2021

The production of drinking milk in 2021 (Figure 5) is highest in the Yuzhen tsentralen region, with a share of 49.5% of the total production. The Yuzhen tsentralen region records the largest production of flavoured yoghurt (with or without additives) – 40.3% of the total production and yellow cheese - 40.9% of the total production.

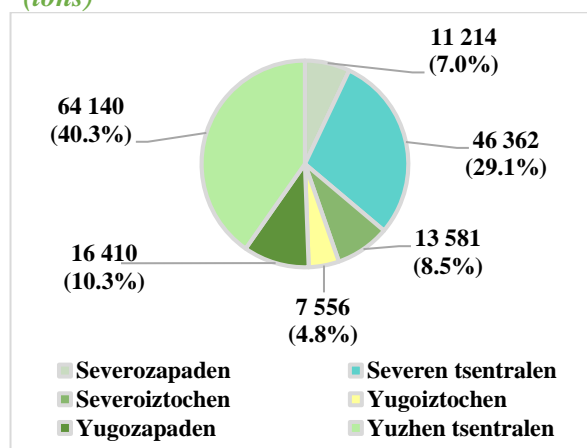
The largest quantity of white brine cheese production (Figure 7) is produced in the Severen tsentralen region and it is 35.1% of the total production at national level, but the production is 2 747 tons less than 2020.

Figure 5
Drinking milk production by statistical regions (thousand litres)



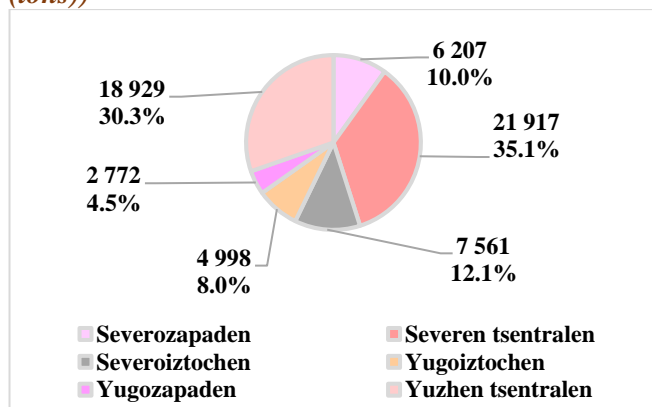
Source: Ministry of Agriculture, Agrostatistics Department, Activity of the dairies in 2021

Figure 6
Yoghurt production by statistical regions (tons)



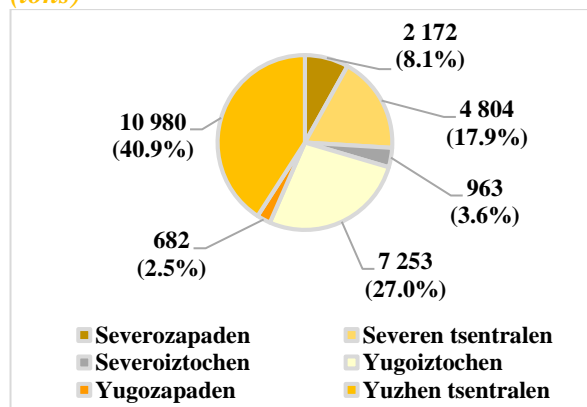
Source: Ministry of Agriculture, Agrostatistics Department, Activity of the dairies in 2021

Figure 7
White brine cheese production by statistical regions (tons)



Source: Ministry of Agriculture, Agrostatistics Department, Activity of the dairies in 2021

Figure 8
Yellow cheese production by statistical regions (tons)



Source: Ministry of Agriculture, Agrostatistics Department, Activity of the dairies in 2021

159 263 tons yoghurt, 75 million litres drinking milk, 62 384 tons white brine cheese and 26 854 tons yellow cheese are manufactured in 2021.

The production of skimmed yoghurt decreased 45.7%, of milk based drinks increased 23.0% (Table 7).

The manufactured quantities of yellow cheese in 2021 decreased 4.0% compared to 2020. The quantities of yellow cheese from ewe's milk increased 6.4%, but yellow cheese obtained from other type of milk decreased nearly with 33.7%. Yellow cheese from cow's milk takes the largest share – 92.6%. The production drops 3.1% compared to 2020.

The production of white brine cheese decreased with 4 075 tons in comparison with 2020 or 6.1%. The largest share (85.5%) is for white brine cheese from cow's milk. The production of brined cheese with added vegetable fat and/or proteins decreases by 5.1% in 2021.

The production of processed and smoked cheeses increased 7.7% in 2021. Other types of cheese (soft cheese, blue cheese, etc.) also increased to +93.6%. There has been a reduction in other milk products during the last two years. The reported decrease in 2021 compared to 2020 is 62 tons.

The production of cream is 3 572 tons which is a growth of 22.9%. Butter production increased with 22.6%.

Table 7

Comparison of main products production by dairy enterprises in 2020 and 2021					
Products for consumption		Production 2020	Production 2021		Change 2021/2020
		Quantity	Quantity	Share of each product in the product group (%)	
Drinking milk (thousand litres)	Whole	29 087	24 441	32.5%	-16.0%
	Semi-skimmed	43 970	49 756	66.1%	13.2%
	Skimmed	1 777	1 068	1.4%	-39.9%
	Total:	74 834	75 265	100.0%	0.6%
Cream – fresh or sour (tons)	Total:	2 906	3 572	100.0%	22.9%
Yoghurt (with or without additives), milk desserts and milk based drinks (tons)	Whole or semi-skimmed	135 531	135 534	85.1%	0.0%
	Skimmed	3 187	1 730	1.1%	-45.7%
	For drinking	17 779	21 999	13.8%	23.7%
	Total:	156 497	159 263	100.0%	1.8%
Butter (tons)	Total:	1 025	1 257	100.0%	22.6%
White brine cheese (tons)	From cow's milk	56 844	53 329	85.5%	-6.2%
	Of which: Non-dairy materials as fats and/or proteins included	13 780	13 082	21.0%	-5.1%
	From ewe's milk	5 913	5 830	9.3%	-1.4%
	Other type of milk	3 702	3 225	5.2%	-12.9%
	Total:	66 459	62 384	100.0%	-6.1%
Yellow cheese (tons)	From cow's milk	25 676	24 876	92.6%	-3.1%
	From ewe's milk	1 153	1 227	4.6%	6.4%
	Other type of milk	1 133	751	2.8%	-33.7%
	Total:	27 962	26 854	100.0%	-4.0%
Fresh cheese (curd included) (tons)	Total:	6 296	7 053	100.0%	12.0%
Other cheese (tons)	Total:	2 670	5 168	100.0%	93.6%
Processed and smoked cheese (tons)	Total:	1 600	1 723	100.0%	7.7%
Other products (tons)	Total:	255	193	100.0%	-24.3%

Source: Ministry of Agriculture, Agrostistics Department, Activity of the dairies in 2021"

Milk production and distribution in Bulgaria

Table 8

Milk production and distribution in Bulgaria 2021 (thousand litres)		
Type of distribution	Total milk	Of which cow's milk
Processed in the dairy enterprises	682 692	645 507
Direct sales, own consumption and other uses in farms	242 286	165 929
Total milk production:	924 978	811 436

Source: Ministry of Agriculture; Agrostistics Department, Activity of the dairies in 2021"

Registered farmers and dairy processing enterprises under Regulation No. 26/2010 on the specific requirements for direct supplies of small quantities of raw materials and food of animal origin sold a total of 83 704 thousand litres of raw or processed milk, of which 69 964 thousand litres are cow's milk (84%) and 7 454 thousand litres ewe's milk (9%).

Raw milk sold directly to consumers is 51 659 thousand litres, and processed milk is 32 045 thousand litres. 1 795 tons white brine cheese, 761 tons yellow cheese, 1 988 tons yoghurt and other dairy products have been sold.

Methodological notes

Purpose - The purpose of the survey is to determine the number of dairy processing enterprises, to collect information on the quantity of raw milk deliveries by type, the quantity of intermediate products deliveries used as materials in the production, the final dairy products, the legal status and the number of persons employed under an employment contract in the enterprises, the market distribution and the value of sales.

The survey information is used for analyses and programs in the sector. It is provided to the Ministry of Agriculture (MoA), the National Statistical Institute (NSI), scientific and industry organizations, Eurostat, FAO, etc. and serves for decision making on management level for the implementation of agrarian policy at national and community level.

Legal framework:

- An ordinance on the statistical surveys related to pig breeding, cattle breeding, buffalo breeding, sheep breeding, goat breeding and to the meat production, milk and dairy products adopted by Decree of the Council of Ministers No. 301 of 6.11.2006, published in Bulgarian Official Journal, No. 93 of 17.11.2006;
- Council Directive 96/16/EO of 19 March 1996 on statistical surveys of milk and milk products;
- Commission decision 97/80/EO of 18 December 1996 laying down provisions for the implementation of Council Directive 96/16/EO of 19 March 1996 on statistical surveys of milk and milk products;
- Regulation (EEC) 3924/91 on the establishment of a Community survey of industrial production (PRODCOM).

The used classifications and definitions are specified in Council Directive 96/16/EC and Commission Decision 97/80/EC; NACE 2008.

Sources of information – The survey was organised by the Agrostistics Department at the Ministry of Agriculture and implemented by experts and officials in the 28 regional directorates. The regional experts conduct an interview with the dairy manager or a person authorized by him, fill-in the statistical questionnaire or receive the data via e-mail. Provided with password access to the agrostistics information system some of the respondents fill the information online in the agrostistic information system (ISAS) (45.9%).

Surveyed Statistical indicators:

1. Quantity of milk transferred for processing, quantity of intermediate products delivered, quantity of intermediate products produced, quantity of final products produced, quantity of final products sold, value of sales (VAT excl.)
2. Legal status and number of persons employed under an employment contract;
3. Main indicators on milk and milk products – quantity of processed milk by type of milk (litres), fat and protein content (%), manufactured milk products (kg), quantities of dairy products sold (kg), value of the quantities sold (BGN);

Respondents – All Bulgarian dairy processors are surveyed exhaustively. The list of dairies has been prepared by the Agrostatistics Department at the Ministry of Agriculture, based on the surveys conducted on the activity of dairy enterprises in recent years and the register supported by Bulgarian Food Safety Agency (BFSA). All the enterprises registered with milk processing activities during the year are surveyed exhaustively. Newly created dairy processors are added every year, information about which is obtained from the BFSA register. The organization and control of the survey is carried out by the Agrostatistics Department of the General Directorate Agriculture and Regional Policy at the Ministry of Agriculture.

Confidentiality – The national confidentiality rules are defined in the Statistics Act. According to Art. 25 individual statistical data as well as statistical information that summarizes data for less than three statistical units or for an aggregate in which the relative share of the value of a studied parameter of one unit is over 85 percent of the total value of this parameter for all units of the population cannot be disclosed or provided. Individual data obtained for the purposes of statistical survey cannot be used as evidence before executive and judicial authorities.

Accessibility and transparency – data on the activity of dairies is available to users on the Ministry of Agriculture website: <http://www.mzh.government.bg/bg/statistika-i-analizi/izsledvane-zhivotnovdstvo/danni/>, according to the deadline established in the National Statistical Program. Main results are published in the Results and Analysis series newsletter. The data are published in the Statistical Reference Book (Agrostatistics Department) and the Statistical Yearbook (NSI), and also transmitted to Eurostat. Additional information, beyond the published one, for all characteristics is available and provided upon request observing the requirements of the Statistics Act.

Distribution of administrative districts by statistical regions (NUTS 2):

Severozapaden: Vidin, Vratsa, Montana, Lovech, Pleven;

Severen tsentralen: Veliko Tarnovo, Gabrovo, Ruse, Silistra, Razgrad;

Severoiztochen: Varna, Dobrich, Targovishte, Shoumen;

Yugoiztochen: Burgas, Sliven, Stara Zagora, Yambol;

Yugozapaden: Blagoevgrad, Kyustendil, Pernik, Sofia-cap., Sofia region;

Yuzhen tsentralen: Kardzhali, Pazardzhik, Plovdiv, Smolyan, Haskovo.

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