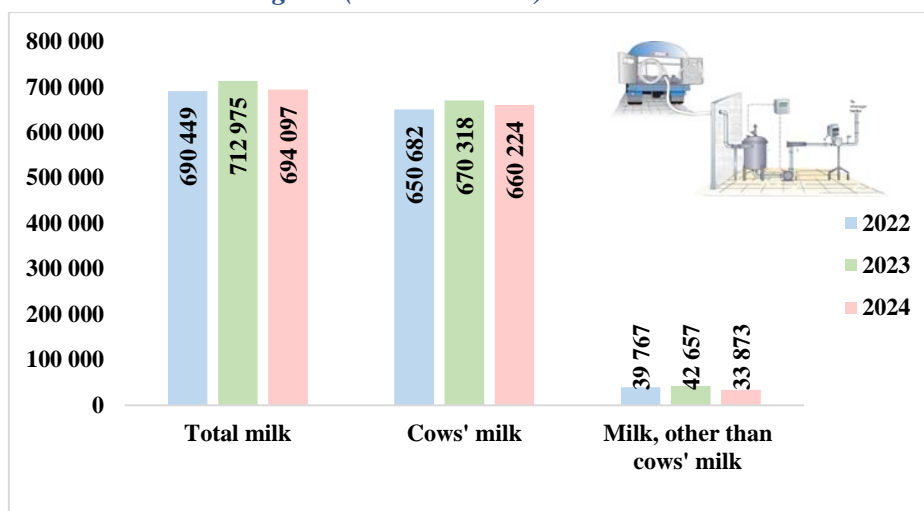




Activity of the dairies in Bulgaria in 2024

235 dairies (milk processors) are interviewed and provide data on milk processing and manufactured milk products in 2024. They process 694 million litres of row milk (deliveries from EU member states and imports from third countries incl.). Processed cows' milk dominates (95.1%), with 1.5% less compared to 2023. In 2024 ewes' milk takes second place (with a share of 3.0%) and is 23.8% less. Goats' milk occupies 1.4% of the processed milk and is 13.3% less than 2023. Processed buffalos' milk and mixed milk are 0.5% of the total milk, with a decrease of 19.6% in 2024.

Figure 1
Processed milk in Bulgaria (thousand litres)



Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2024

Table 1

Quantities of processed milk declared in 2022, 2023 and 2024, deliveries from EU member states and imports from third countries incl.							
Type of milk	2022		2023		2024		Change 2024/2023
	Quantity (thousand litres)	Share of processed milk (%)	Quantity (thousand litres)	Share of processed milk (%)	Quantity (thousand litres)	Share of processed milk (%)	
Cows' milk	650 682	94.4%	670 318	94.0%	660 224	95.1%	-1.5%
Ewes' milk	24 295	3.4%	27 265	3.8%	20 781	3.0%	-23.8%
Goats' milk	11 365	1.6%	11 473	1.7%	9 943	1.4%	-13.3%
Buffalos' milk, mixed milk and cream	4 107	0.6%	3 919	0.5%	3 149	0.5%	-19.6%
Total :	690 449	100%	712 975	100%	694 097	100%	-2.6%

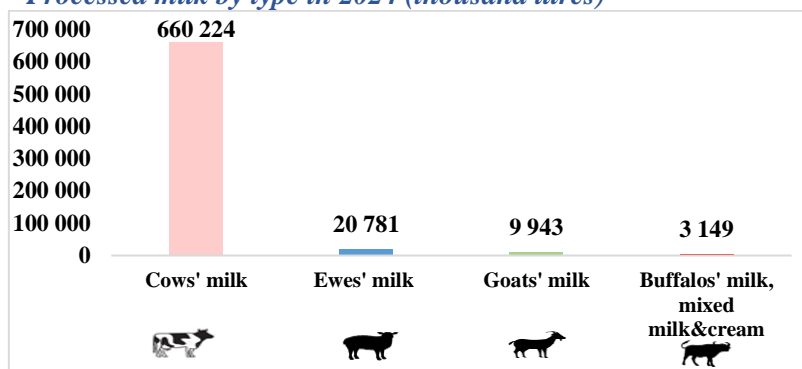
Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2024

In 2024 according to data provided by milk processing enterprises, and in addition of the amounts indicated in Table 1, there are extra 1 453 tons of concentrated milk input in the dairy products, 6 116 tons of milk powder and cream powder, 331 tons milk concentrate* and 2 151 tons other products (cream, leaven, whey). The processed quantities of raw milk, delivered by EU member states or imported from third countries amount to over 44.2 thousand tons in total. Input raw materials of non-dairy origin (fats and/or proteins) are 4 881 tons.

*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 type in 2024 (thousand litres)



Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2024

Table 2

Dairy enterprises - Legal status 2024			
Legal status	Number	Quantities of processed milk, Deliveries from EU member states and imports from third countries incl. (thousand litres)	Share of the total processed milk
Sole trader (ST)	29	22 520	3.3%
Companies	198	669 294	96.4%
Other	8	2 283	0.3%
Total:	235	694 097	100%

Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2024

The number of dairy processing enterprises – interviewed and providing data (Table 2) stays stable in 2024 compared to 2023. The sole traders process 3.3% of the milk and companies 96.4% of the total processed milk.

Table 3

Average fat and protein content in processed raw milk in 2024		
Type of milk	Milk fat content	Milk protein content
Cows' milk	3.75%	3.26%
Ewes' milk	6.50%	5.18%
Goats' milk	3.61%	3.27%
Buffalos' milk	6.29%	4.49%

Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2024

In the interviewed 235 dairy enterprises 7 413 persons are employed under an employment contract on 31.12.2024, which is 1% less compared to employed persons in 2023. The districts: Plovdiv, Silistra, Razgrad, Sliven and Gabrovo have the largest numbers of employees. Ruse, Kyustendil, Pernik, Montana and Pleven have the least number of employees.

The total value (VAT excl.) of milk products sold by dairies is 1.293 billion BGN in 2024, which is 3% less than in 2023.

Table 4

Processed milk, internal deliveries by statistical regions (NUTS 2) in 2023 and 2024 (thousand litres)					
Statistical Region	2023		2024		Change total milk 2024/2023
	Total milk quantity	Cows' milk incl.	Total milk quantity	Cows' milk incl.	
Severozapaden	54 437	51 061	50 633	47 239	-7.0%
Severen tsentralen	173 962	168 664	164 738	161 446	-5.3%
Severoiztochen	61 095	53 739	58 523	51 469	-4.2%
Yugoiztochen	100 051	91 391	141 886	135 254	41.8%
Yugozapaden	45 921	43 856	42 464	40 636	-7.5%
Yuzhen tsentralen	238 233	224 755	191 617	179 970	-19.6%
Bulgaria	673 699	633 466	649 861	616 013	-3.5%

Source: Ministry of Agriculture and Food, Agrostatistics Department, Activity of the dairies in 2024

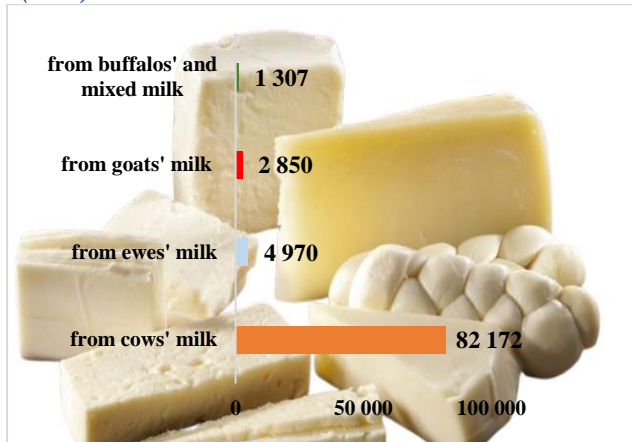
Table 5

Dairy products by processors and by type of milk in 2024							
Product for consumption		Production 2023	Production 2024				Product quantity change 2024/2023
		Quantity	Quantity	Share of each product in the product group (%)	Number of dairies	Average production	
Packaged milk for drinking (thousand litres)		64 447	68 622	100%	57	1 204	6.5%
Cream – fresh or sour(tons)		2 301	2 804	100%	32	88	21.9%
Natural yoghurt – (tons)	from cows' milk	150 684	157 846	99%	127	1 243	4.8%
	from ewes' or mixed milk	2 437	688	0.4%	25	28	-71.8%
	from buffalos' milk	317	243	0.2%	14	17	-23.3%
	from goats' milk	490	574	0.4%	10	57	17.1%
	Total:	153 928	159 351	100%	129	1 235	3.5%
Flavoured yoghurt (with or without additives, milk desserts and milk based drinks (tons)		9 569	8 392	100%	20	420	-12.3%
Cheese (tons)	from cows' milk	87 218	82 172	90.0%	205	401	-5.8%
	from ewes' milk	6 297	4 970	5.5%	65	76	-21.1%
	from buffalos' or mixed milk	3 377	2 850	3.1%	51	56	-15.6%
	from goats' milk	1 412	1 307	1.4%	48	27	-7.4%
	Total:	98 304	91 299	100%	213	429	-7.1%
Melted and smoked cheese (tons)		1 605	1 352	100%	25	54	-15.8%

Source: Ministry of Agriculture and Food, Agrostatistics Department, Activity of the dairies in 2024

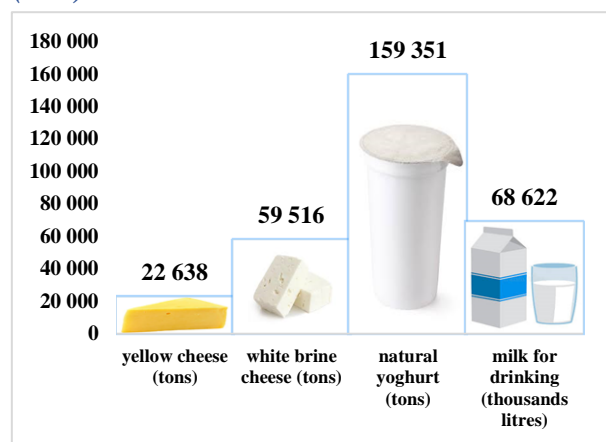
Basic dairy products in 2024

Figure 3
Cheese production by type of milk
(tons)



Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2024

Figure 4
Basic dairy products in Bulgaria
(tons)



Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2024

In 2024, the production of natural yoghurt increases 3.5% compared to 2023 (159 351 tons), with the increase in the yoghurt from cows' and goats' milk. The production of natural yoghurt from ewes' and mixed milk plummets down by 71.8%. Yoghurt from cows' milk has the largest share 99.0%, followed yoghurt from ewes' and mixed milk with 0.4% and goats' milk (0.4%).

Flavoured yoghurt (with or without additives) milk desserts and milk based drinks are 8 392 tons or 12.3% less than in 2023.

There is a slight decrease in the cheese production of 7.1% compared to 2023. Cheese from cows' milk has the largest share of 90.0%, followed by cheese from ewes' milk with 5.5% (Table 5). The cheese production from buffalos' milk and mixed milk decreases in 2024 by 15.6% and takes 3.1%.

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

Table 6

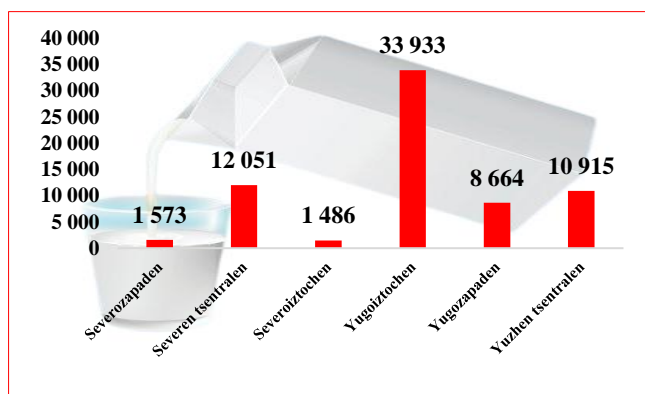
Production of basic dairy products by statistical regions in 2024 (NUTS 2)							
Dairy products	Severoza-paden	Severen tsentralen	Severo-iztochen	Yugo-iztochen	Yugo-zapaden	Yuzhen tsentralen	Bulgaria
Packaged milk for drinking (thousand litres)	1 573	12 051	1 486	33 933	8 664	10 915	68 622
Natural yoghurt – (tons)	12 836	52 517	8 121	21 608	17 984	46 285	159 351
White brine cheese (tons)	4 986	22 257	8 827	4 728	2 898	15 820	59 516
Yellow cheese (tons)	1 612	4 232	611	3 977	638	11 568	22 638

Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2024

The production of packaged milk for drinking in 2024 (Figure 5) is highest in Yugoiztochen region, with a share of 49.4% of the total production. Severen tsentralen region records the largest production of yoghurt with 33.0%, and white brine cheese with 37.4% of the total production at national level.

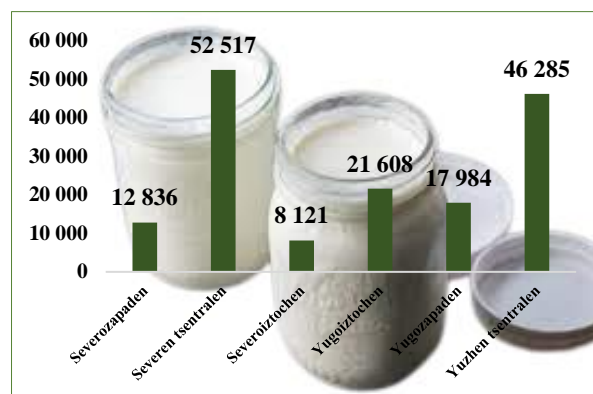
The largest quantity of yellow cheese is produced in Yuzhen tsentralen region – 51.1% of the total production.

Figure 5
Packaged milk for drinking by statistical regions
(thousand litres)



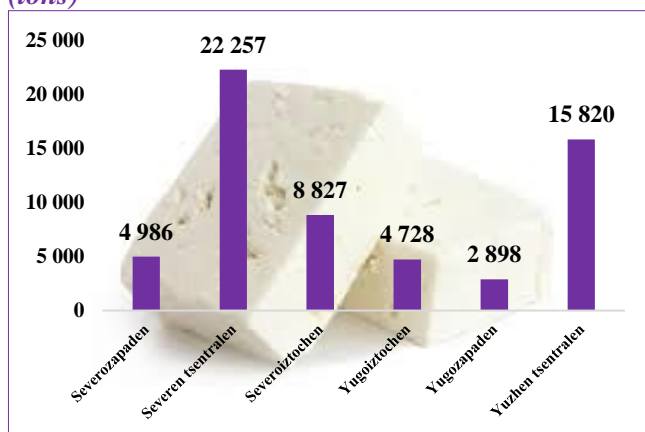
Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2024

Figure 6
Yoghurt production by statistical regions
(tons)



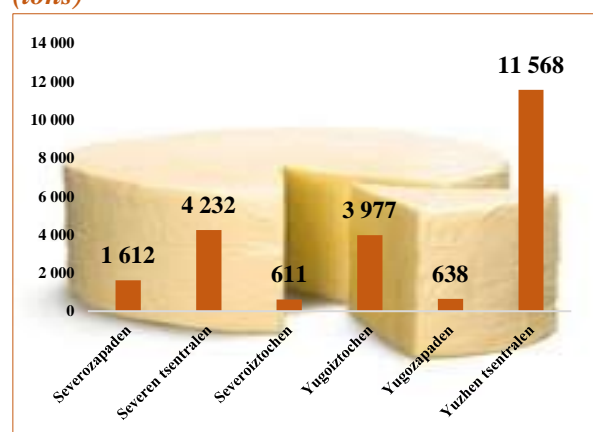
Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2024

Figure 7
White brine cheese by statistical regions
(tons)



Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2024

Figure 8
Yellow cheese by statistical regions
(tons)



Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2024

159 351 tons yoghurt, 68 million litres packaged milk for drinking, 59 516 tons white brine cheese and 22 638 tons yellow cheese are produced in 2024.

6.5% increase in the production of packaged milk for drinking is recorded (compared to 2023), as the produced whole milk is 63.0% more compared to 2023. In 2024, the largest share takes the whole milk with 51.4%, the smallest share takes the skimmed milk with 1.5%. (Table 7).

The manufactured yellow cheese in 2024 is 14.0% less than in 2023. The quantities of yellow cheese from cows' milk decreases by 10% compared to 2023. Yellow cheese obtained from ewes' milk decreases to 74.5%. Yellow cheese from cows' milk takes the largest share with 97.7%.

The production of white brine cheese in 2024 drops to 2 815 tons (or 4.5%) compared to 2023. The largest share (86.9%) takes the white brine cheese from cows' milk. The white brine cheese, obtained from other type of milk decreases by 11.9%. The production of brine cheese with added vegetable fat and/or proteins increases with 0.9% in 2024.

The production of melted and smoked cheese is 15.8% less in 2024. Other types of cheese (soft cheese, blue cheese, etc.) increases by 11.4%. There is a significant increase of other milk products. The reported growth in 2024 is 8 843 tons.

The production of cream is 2 804 in 2024, which is increase of 21.9%. Butter production climbs to 979 tons or increases by 3.6%.

Table 7

Comparison of main products production by dairy enterprises in 2023 and 2024					
Products for consumption		Production 2023	Production 2024		Change 2024/2023
		Quantity	Quantity	Share of each product in the product group (%)	
Packaged milk for drinking (thousand litres)	Whole	21 661	35 301	51.4%	63.0%
	Semi-skimmed	40 950	32 292	47.1%	-21.1%
	Skimmed	1 836	1 029	1.5%	-44.0%
	Total:	64 447	68 622	100.0%	6.5%
Cream – fresh or sour (tons)	Total:	2 301	2 804	100.0%	21.9%
Natural yoghurt (tons)	Whole or semi- skimmed	135 072	137 029	87.7%	1.4%
	Skimmed	2 103	3 498	2.2%	66.3%
	For drinking	16 753	18 824	11.8%	12.4%
	Total:	153 928	159 351	100.0%	3.5%
Butter (tons)	Total:	945	979	100.0%	3.6%
White brine cheese (tons)	From cows' milk	53 641	51 690	86.9%	-3.6%
	of which: Non- dairy materials as fats and/or proteins included	12 219	12 329	20.7%	0.9%
	From ewes' milk	4 899	4 485	7.5%	-8.5%
	Other type of milk	3 791	3 341	5.6%	-11.9%
	Total:	62 331	59 516	100%	-4.5%
Yellow cheese (tons)	From cows' milk	24 558	22 111	97.7%	-10.0%
	From ewes' milk	1 301	332	1.5%	-74.5%
	Other type of milk	449	195	0.9%	-56.6%
	Total:	26 308	22 638	100.0%	-14.0%
Fresh cheese (curd included) (tons)	Total:	6 281	5 378	100.0%	-14.4%
Other cheese (tons)	Total:	3 383	3 767	100.0%	11.4%
Melted and smoked cheese (tons)	Total:	1 605	1 352	100.0%	-15.8%
Other products (tons)	Total:	565	c	100.0%	c

Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2024; c – confidential data

Milk production and distribution in Bulgaria

Table 8

Milk production and distribution in Bulgaria in 2024 (thousand litres)		
Type of distribution	Total milk	Of which cows' milk
Processed in the dairy enterprises	649 861	616 013
Direct sales, own consumption and other uses in farms	120 659	71 571
Total milk production:	770 520	687 584

Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2024

Registered farmers and dairy processing enterprises under Regulation № 26/2010 on the specific requirements for direct supplies of small quantities of raw materials and food of animal origin sold a total of 54 768 thousand litres of raw or processed milk, of which 43 876 thousand litres cows' milk (80.1%) and 6 307 thousand litres ewes' milk (11.5%). Raw milk sold directly to consumers is 32 763 thousand litres, and processed milk is 22 004 thousand litres. 2 206 tons white brine cheese, 460 tons yellow cheese, 2 988 tons yoghurt, 3 796 tons pasteurised packaged milk for drinking and other milk products are produced.

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 end 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 and Food (MAF), 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 and dairy production, 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.

Source of information – The survey is organised by the Agrostatistics Department at the Ministry of Agriculture and Food and implemented by experts 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 agrostatistics information system 52% of the respondents filled the information for 2024 online in the agrostatistic information system (ISAS).

Surveyed Statistical indicators:

1. Quantity of milk transferred for processing, quantity of intermediate products delivered, quantity of end products, quantity of end 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 (litres, kg), quantities of dairy products sold (litres, kg), value of the quantities sold (BGN);

Respondents – All Bulgarian dairy processors are surveyed exhaustively. The list of dairies is prepared by the Agrostatistics Department at the Ministry of Agriculture and Food, 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 Agrostistics Department of the General Directorate Agriculture and Regional Policy at the Ministry of Agriculture and Food.

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 and Food 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 (Agrostistics 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.

The publication is editorially completed on 25.06.2025

Editor:

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