

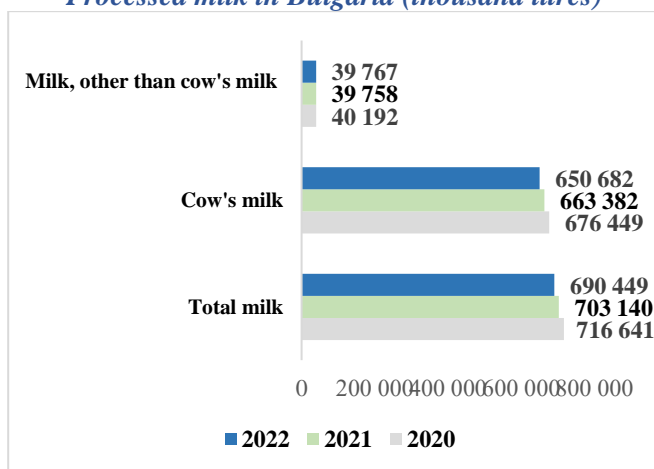


Activity of the dairies in Bulgaria 2022

240 dairies (milk processors) provided data on milk processing and manufactured milk products in 2022. They processed 690 million litres of raw milk (including deliveries from EU member states and imports from third countries). Processed cow's milk dominates (94.2%), with 1.9% less compared to 2021. In 2022, ewe's milk takes second place (with a share of 3.5%). Goat's milk occupies 1.7% of processed milk and is 1.2% more compared to 2021. 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 and Food, Agrostatistics Department, Activity of the dairies in 2022

Table 1

Quantities of processed milk declared in 2020, 2021 and 2022, deliveries from EU member states and imported from third countries incl.							
Type of milk	2020		2021		2022		Change 2022/2021 (%)
	Quantity (thousand litres)	Share of processed milk (%)	Quantity (thousand litres)	Share of processed milk (%)	Quantity (thousand litres)	Share of processed milk (%)	
Cow's milk	676 449	94.4%	663 382	94.4%	650 682	94.2%	-1.9%
Ewe's milk	25 318	3.5%	24 109	3.4%	24 295	3.5%	0.8%
Goat's milk	10 413	1.5%	11 228	1.6%	11 365	1.7%	1.2%
Buffalo's milk, mixed milk and cream	4 461	0.6%	4 421	0.6%	4 107	0.6%	-7.1%
Total:	716 641	100%	703 140	100%	690 449	100%	-1.8%

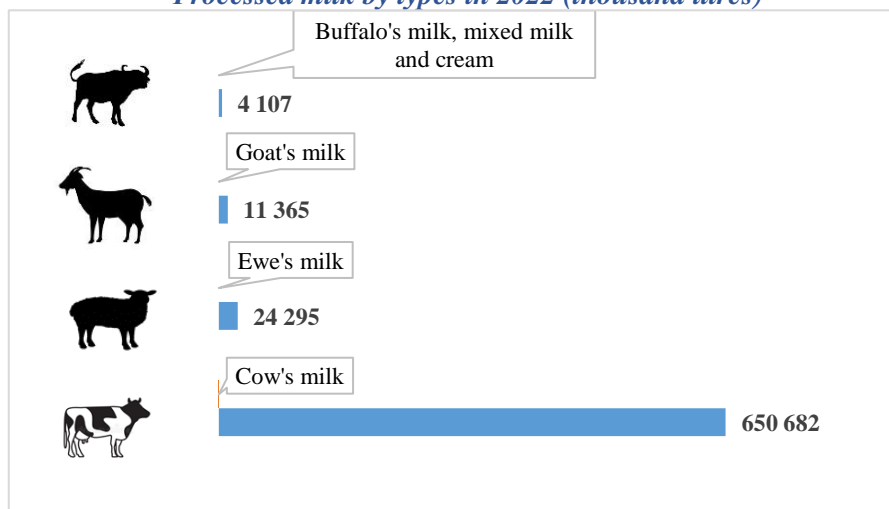
Source: Ministry of Agriculture and Food, Agrostatistics Department, Activity of the dairies in 2022

In 2022, 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 4 374 tons of concentrated milk input in the dairy products, 6 634 tons of milk powder and cream powder, 4 856 tons of milk concentrate* and 526 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 23 thousand tons in total. Inputted raw materials of non-dairy origins (fats and/or proteins, containing milk) are 4 819 tons.

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

Figure 2

Processed milk by types in 2022 (thousand litres)



Source: Ministry of Agriculture and Food, Agrostatics Department, Activity of the dairies in 2022

Table 2

Dairy enterprises - Legal status 2022			
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)	31	28 420	4.1%
Companies	204	660 979	95.7%
Other status	5	1 050	0.2%
Total:	240	690 449	100%

Source: Ministry of Agriculture and Food, Agrostatics Department, Activity of the dairies in 2022

The number of dairies (Table 2) owned by sole traders decreases in 2022. They processed 4.1% of the milk. The processed milk from dairies with legal status - companies is 95.7% of the total processed milk.

Table 3

Average fat and protein content in processed raw milk in 2022		
Type of milk	Milk fat content	Milk protein content
Cow's milk	3.66%	3.31%
Ewe's milk	6.48%	5.31%
Goat's milk	3.66%	3.32%
Buffalo' milk	6.64%	4.26%

Source: Ministry of Agriculture and Food (MAF), Agrostatics Department, Activity of the dairies in 2022

8 017 is the number of persons employed under an employment contract in the 240 dairy enterprises on 31.12.2022. The districts Plovdiv, Silistra, Dobrich and Gabrovo have the largest number of employees, Ruse, Kyustendil, Vratsa and Pernik have the least number of employees.

In 2022 the total value (VAT excl.) of sold milk products by the dairies is 1.263 billion BGN, which is 19% more than in 2021.

Table 4

Processed milk, internal deliveries by statistical regions in 2021 and 2022 (thousand litres)					
Statistical region	2021		2022		Change total milk 2022/2021
	Total milk quantity	cow milk incl.	Total milk quantity	cow milk incl.	
Severozapaden	63 737	60 326	56 544	53 504	-11.3%
Severen tsentralen	165 894	160 670	167 369	162 841	0.9%
Severoiztochen	63 063	57 383	58 557	51 438	-7.1%
Yugoiztochen	90 382	85 163	93 484	86 244	3.4%
Yugozapaden	54 901	53 239	56 894	55 382	3.6%
Yuzhen tsentralen	244 714	228 726	234 293	219 653	-4.3%
Bulgaria	682 691	645 507	667 141	629 062	-2.3%

Source: Ministry of Agriculture and Food, Agrostatics Department, Activity of the dairies in 2022

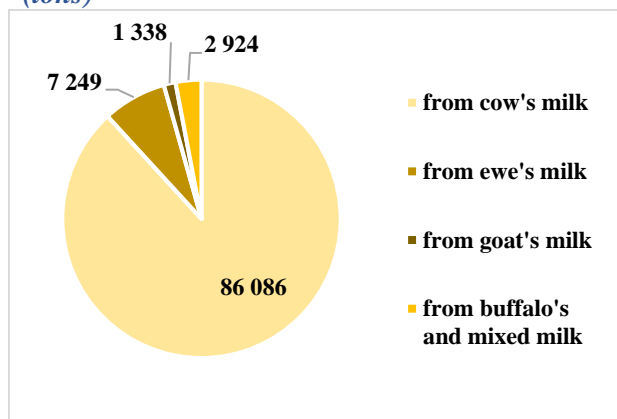
Table 5

Dairy processors in 2022 and dairy products by type of milk							
Products for consumption	Production 2021	Production 2022				Product quantity Change 2022/2021	
	Quantity	Quantity	Share of each product in the product group (%)	Number of dairies	Average production		
Drinking milk (thousand litres)	75 265	66 153	100%	58	1 141	-12.1%	
Cream – fresh or sour (tons)	3 572	2 545	100%	31	82	-28.8%	
Natural yoghurt – (tons)	from cow's milk	157 665	149 222	97.8%	127	1 175	-5.4%
	from ewe's or mixed milk	1 176	2 436	1.6%	28	87	107.1%
	from buffalo's milk	422	327	0.2%	15	22	-22.5%
	from goat's milk	-	539	0.4%	13	41	-
	Total:	159 263	152 524	100%	131	1 164	-4.2%
Flavoured yoghurt (with or without additives), milk desserts and milk based drinks (tons)	15 269	14 067	100%	18	782	-7.9%	
Cheese (tons)	from cow's milk	89 890	86 086	88.2%	210	410	-4.2%
	from ewe's milk	7 270	7 249	7.4%	72	101	-0.3%
	from buffalo's milk and mixed milk	3 035	2 924	3.0%	51	57	-3.7%
	from goat's milk	1 262	1 338	1.4%	43	31	6.0%
	Total:	101 457	97 597	100%	223	438	-3.8%
Processed and smoked cheese (tons)	1 723	1 550	100%	26	60	-10.0%	

Source: Ministry of Agriculture and Food, Agrostatics Department, Activity of the dairies in 2022

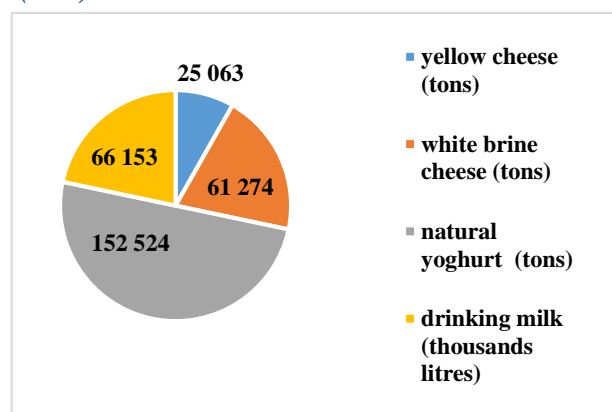
Basic dairy products in 2022

Figure 3
Cheese production by type of milk (tons)



Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2022

Figure 4
Basic dairy products in Bulgaria (tons)



Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2022

In 2022, the production of natural yoghurt decreased 4.2% (152 524 tons) compared to 2021. Yoghurt from buffalo's and cow's milk decreased, but from ewe's and mixed milk increased to 2 436 tons. Yoghurt from cow's milk has the largest share with 97.8%, followed by ewe's and mixed milk – 1.6%.

Flavoured yoghurt (with or without additives), milk desserts and milk based drinks (tons) are 14 067 tons – 7.9% less than in 2021.

Cheese production decreased 3.8% in comparison with 2021. Cheese from cow's milk accounted for 88.2%, followed by cheese obtained from ewe's milk – 7.4% (Table 5).

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

Table 6

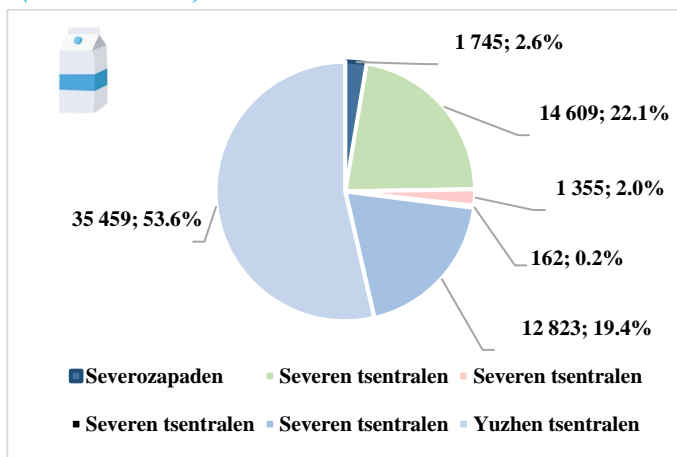
Production of basic dairy products by statistical regions (NUTS 2)							
Dairy production	Severo-zapaden	Severen tsentralen	Severo-iztochen	Yugo-iztochen	Yugo-zapaden	Yuzhen tsentralen	Bulgaria
Drinking milk (thousand litres)	1 745	14 609	1 355	162	12 823	35 459	66 153
Natural yoghurt – (tons)	11 512	43 157	7 666	6 951	18 309	64 929	152 524
White brine cheese (tons)	4 990	21 537	7 830	5 320	3 143	18 454	61 274
Yellow cheese (tons)	1 826	3 220	940	7 774	623	10 680	25 063

Source: Ministry of Agriculture and Food, Agrostistics Department, Activity of the dairies in 2022

The production of drinking milk in 2022 (Figure 5) is highest in the Yuzhen tsentralen region, with a share of 53.6% of the total production. The Yuzhen tsentralen region recorded the largest production of yoghurt – 42.6% of the total production and yellow cheese – 42.6% of the total production.

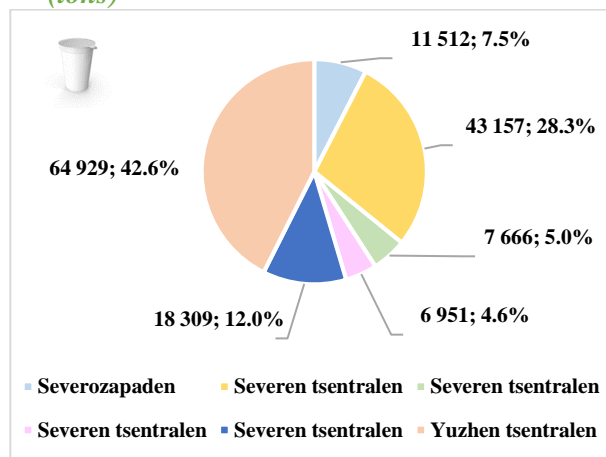
The largest quantity of white brine cheese production (Figure 7) is produced in the Severen tsentralen region and it is 35.1% of the total production at national level.

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



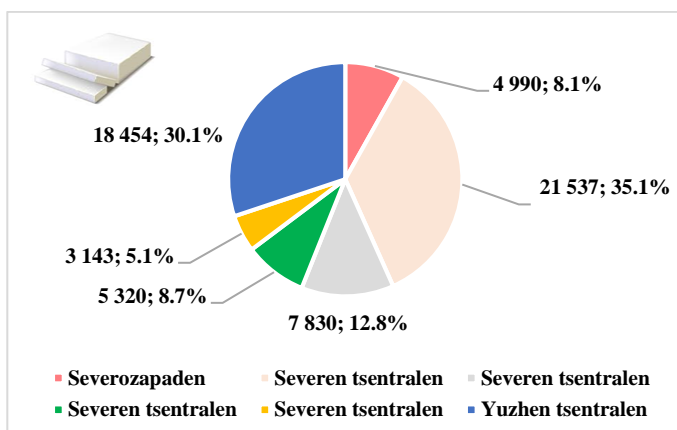
Source: Ministry of Agriculture and Food; Agrostatistics Department, Activity of the dairies in 2022

Figure 6
Yoghurt production by statistical regions
(tons)



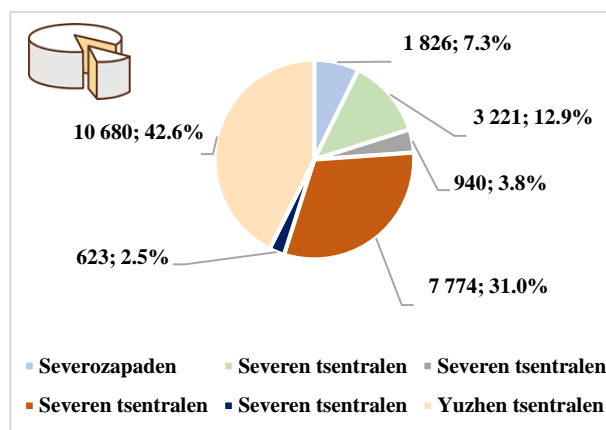
Source: Ministry of Agriculture and Food, Agrostatistics Department Activity of the dairies in 2022

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



Source: Ministry of Agriculture and Food; Agrostatistics Department Activity of the dairies in 2022

Figure 8
Yellow cheese production by statistical regions
(tons)



Source: Ministry of Agriculture and Food, Agrostatistics Department Activity of the dairies in 2022

152 524 tons yoghurt, 66 million litres drinking milk, 61 274 tons white brine cheese and 25 063 tons yellow cheese are manufactured in 2022.

The production of skimmed yoghurt decreased 58.4%, of milk based drinks decreased 8.2% (Table 7).

The manufactured quantities of yellow cheese in 2022 decreased 6.7% compared to 2021. The quantities of yellow cheese from ewe's milk increased 23.7%, but yellow cheese obtained from other type of milk decreased nearly 40.0%. Yellow cheese from cow's milk takes the largest share– 92.1%. The production drops 7.2% compared to 2021.

The production of white brine cheese decreased with 1 110 tons in comparison with 2021 or 1.8%. The largest share (85.6%) is for white brine cheese from cow's milk. The production of brined cheese with added vegetable fat and/or proteins decreases by 5.4% in 2022.

The production of processed and smoked cheeses decreased 10.0% in 2022. Other types of cheese (soft cheese, blue cheese, etc.) also decreased (-51.9%). There has been a reduction in other milk products during the last two years. The reported decrease in 2022 compared to 2021 was 78 tons.

The production of cream is 2 545 tons which is a reduction of 28.8%. Butter production increased to 1 336 tons or with 6.3%.

Table 7

Comparison of main products production by dairy enterprises in 2021 and 2022					
Products for consumption		Production 2021	Production 2022		Change 2022/2021
		Quantity	Quantity	Share of each product in the product group (%)	
Drinking milk (thousand litres)	Whole	24 441	23 523	35.5%	-3.8%
	Semi-skimmed	49 756	41 534	62.8%	-16.5%
	Skimmed	1 068	1 096	1.7%	2.6%
	Total:	75 265	66 153	100.0%	-12.1%
Cream – fresh or sour (tons)	Total:	3 572	2 545	100.0%	-28.8%
Yoghurt (with or without additives), milk desserts and milk based drinks (tons)	Whole or semi- skimmed	135 534	131 618	86.3%	-2.9%
	Skimmed	1 730	720	0.5%	-58.4%
	For drinking	21 999	20 186	13.2%	-8.2%
	Total:	159 263	152 524	100.0%	-4.2%
Butter (tons)	Total:	1 257	1 336	100.0%	6.3%
White brine cheese (tons)	From cow's milk	53 329	52 460	85.6%	-1.6%
	Of which: Non- dairy materials as fats and/or proteins included	13 082	12 371	20.2%	-5.4%
	From ewe's milk	5 830	5 540	9.0%	-5.0%
	Other type of milk	3 225	3 274	5.3%	1.5%
	Total:	62 384	61 274	100.0%	-1.8%
Yellow cheese (tons)	From cow's milk	24 876	23 091	92.1%	-7.2%
	From ewe's milk	1 227	1 518	6.1%	23.7%
	Other type of milk	751	454	1.8%	-39.5%
	Total:	26 854	25 063	100.0%	-6.7%
Fresh cheese (curd included) (tons)	Total:	7 053	8 775	100.0%	24.4%
Other cheese (tons)	Total:	5 168	2 485	100.0%	-51.9%
Processed and smoked cheese (tons)	Total:	1 723	1 550	100.0%	-10.0%
Other products (tons)	Total:	193	115	100.0%	-40.4%

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

Milk production and distribution in Bulgaria

Table 8

Milk production and distribution in Bulgaria 2022 (thousand litres)		
Type of distribution	Total milk	Of which cows' milk
Processed in the dairy enterprises	667 141	629 062
Direct sales, own consumption and other uses in farms	175 886	119 216
Total milk production:	843 027	748 278

Source: Ministry of Agriculture and Food (MAF), Agrostatistics Department, Activity of the dairies in 2022

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 53 442 thousand litres of raw or processed milk, of which 42 752 thousand litres are cow's milk (80%) and 6 802 thousand litres ewe's milk (13%).

Raw milk sold directly to consumers is 41 682 thousand litres, and processed milk is 11 760 thousand litres. 1 069 tons white brine cheese, 160 tons yellow cheese, 1 120 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 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 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 Food 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 was 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 Agrostatistics 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-zhivotnovodstvo/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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