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Report Name: 2020 Agricultural Census Confirms Farm Consolidation and Growth

Country: Bulgaria

Post: Sofia

Report Category: Agriculture in the Economy, National Plan, Policy and Program Announcements, Agriculture in the Economy, National Plan, Policy and Program Announcements

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Report Highlights:

In 2020, Bulgaria conducted an agricultural census based on European Union (EU) regulations and Food and Agricultural Organization (FAO) recommendations. Bulgaria typically conducts agricultural censuses every ten years. The recently-published 2020 census reveals that Bulgaria's agricultural industry changed significantly during the first ten years of EU membership (since 2007) with clear trends toward commercialization and consolidation. Currently, there are 132,000 Bulgarian farms, of which the average size has tripled over the last ten years to 33 hectares (HA) per farm. About nine percent of the farms account for 85 percent of the utilized agricultural land (UAL).

Overview

From September to December 2020, Bulgaria conducted an agricultural census based on EC Regulation 2018/1091, FAO recommendations, and the [Bulgarian Law for Agricultural Census](#) (2020). Prior to the 2020 census, Bulgaria also conducted agricultural censuses in 2003 and 2010, and 2020. This report summarizes the first tentative [published](#) results. The census was carried out online and by spot visits. The final results will be published during the first half of 2022, as per the local legislation. Eurostat is scheduled to publish final data from the census during the second half of 2022.

Farming Industry

According to the census' preliminary data, 132,400 total Bulgarian farms cultivate 3,957,000 HA of UAL. The number of farms declined by 64 percent compared to 2010 (370,200 farms) and by 80 percent compared to 2003.

This steep decline in the number of farms occurred in parallel with farm enlargement. In 2020, the UAL was nine percent more than in 2010 and 36 percent more than in 2003. Significant agricultural land had been abandoned and uncultivated between 1990 and 2000 due to challenges related to land privatization and opaque ownership. With the development of private farming since 2000, this land was put back under cultivation. As a result, the average farm size in 2020 is 33 HA, compared to 10 HA/farm in 2010, and 4.0 HA/farm in 2003. Northern Bulgaria has the highest share of UAL (above 38 percent), followed by the southcentral and southeastern regions, which account for between 11 and 23 percent of UAL, and Bulgaria's southwest where the share of UAL is the lowest at five to ten percent.

The number of farms with less than 1.0 HA/farm declined by 80 percent in 2020 versus 2010. About nine percent of farms, with 50 HA/farm or more, cultivate 85 percent of all UAL. The number of these large farms grew by 28 percent in 2020 over 2010 (Table 1).

Table 1. Number of Farms and Utilized Agricultural Land Development 2003-2020

Number of Farms (000') and Utilized Agricultural Land (UAL) (000') HA, 2003-2020										
Years	Farms¹	UAL	Farms²	UAL	Farms³	UAL	Farms⁴	UAL	Farms⁵	UAL
2003	502	193	90	120	52	186	6	127	5	2,279
2010	248	82	47	63	41	163	13	279	8	3,031
2020	50	16	15	21	25	116	18	438	11	3,366

1- Farms with less than and/or at 1.0 HA
2- Farms with 1.0 HA to 2.0 HA
3- Farms with 2.0 HA to 10.0 HA
4- Farms with 10.0 HA to 50.0 HA
5- Farms with 50.0 HA and above

Source: Bulgarian Ministry of Agriculture, Foods and Forests

Trends toward farm commercialization and consolidation result from local agricultural market and trade convergence with European and international markets, higher domestic supports, especially subsidies based on area (Single Area Payment Scheme), and the rapid development of the grain and oilseeds industries. Recent EU-driven policies pursued in support of small farms did not seem to affect the result in favor of farm consolidations. Conversely, market forces have strongly shaped Bulgarian agriculture.

Agricultural Crops Farms

In 2020, arable land reached 3,318,600 HA or 84 percent of all UAL, followed by 14 percent for pastures, and two percent for orchards. The size of arable land grew by 24 percent compared to 2003 and by six percent over 2010. Pastureland area also increased by 40 percent in 2020 over 2010. The size of orchard land remained flat from 2010 to 2020.

Grain crops accounted for the highest share of arable land at 60 percent, followed by oilseeds at 31 percent. Land under cereal grain production grew by 11 percent in 2020 over 2010 and by 24 percent over 2003. The leading grain crop (in terms of land size) is wheat. Sunflower accounted for the leading oilseed crop.

Animal Husbandry Farms

The livestock farms in 2020 numbered at 71,500, including 31,000 cattle farms, 12,000 goat farms, 22,000 sheep farms, and 3,000 hog farms. Although not as clearly outlined as crop farms, livestock farm consolidation and commercialization is also reflected by the census data. The average number of animals per farm grew for all type of farms: from six head of cattle per farm in 2010 to 20/farm in 2020; from five head of goats in 2010 to 21 head in 2020, from 15 head of sheep in 2010 to 58 head in 2020, and from eight hogs in 2010 to 190 hogs in 2020. The commercialization is the most pronounced in the pork industry.

Agricultural Labor

The census indicated 292,000 employees in agriculture, which included family members and hired workers. Families accounted for 79 percent of all labor. This data refutes the popular notion that farm expansion and consolidation leads to establishment of corporate farming. Male labor dominates in all age groups. Most of the agricultural labor, about 60 percent, is at and above 45 years old.

Women play an increasingly important role in the agricultural industry and account for 28 percent of Bulgarian farm managers (managing 37,000 farms), five percentage points higher in 2020 over 2010. Another positive trend is the growing number of younger farm managers (between 25-54 years) while the share of those 55 and older 55 declined from 2010.

Attachments:

No Attachments.