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ROMANIAN MILK MARKET ANALYSIS

Case
study

Keywords

Milk,
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JEL Classification

M21, L11

Abstract

The paper investigates the evolution of Romanian milk market in the European market context: primary production, milk processing, supply and demand, consumption, prices and quality; marketing, the domestic market. Deficiencies in the dairy sector has created conditions for import rising. Last year brought about significant increases in imports of raw milk, decreased milk product supplied by local farmers and keeping the main positions of the processors on the market. Domestic consumption of milk per capita remains low in comparison with the European average. The reduction of milk quotas will be a challenge to domestic producers. Development of associations of producers may be a viable option to ensure the continuity of business for the Romanian farmers.

Introduction

The breeding of animals for milk represents a basic occupation of the population living in the mountains and in rural areas, ensuring the best usage of fodder obtained from natural pastures, steady incomes and local workforce stability. The implementation of some government strategies to support the national level of production and to efficiently capitalize raw milk, together with the implementation of some measures suitable for national economy could ensure a healthy nutrition to the population and substantial income. The support granted to farmers can allow the implementation of investment in refurbishing the activity, obtaining controlled dairy products, with good quality characteristics and superior warranty. In many cases, for breeders from many areas, milk is the only sustenance and commercial exchange source. Milk and dairy products represent strategic types of food recommended for children, for the elderly, for people who are on a diet or who suffer from different diseases. The national dairy product market represents about 800 million euros in 2013. The main competitors are Friesland, Danone, Albalact, Delaco, LaDorna and Covalact (Vaschi, 2014). In Romania large quantities of cow and sheep milk are being consumed or marketed. There are also smaller quantities of buffalo and goat milk that are being consumed or marketed. The quality of the dairy products is obtained at the farm and in the processing plant; it is maintained in commerce and is ascertained by the consumer.

Materials and methods

The data used in this article represent statistical information presented by specialized national, European or global institutions, information presented in the media, journals, food industry treatises/dissertations. All data collected from FAO databases, Eurostat databases and National Institute of Statistics was rewritten into the tables. There have been used data series regarding livestock production, raw milk production, milk and dairy product imports in Romania, milk processing plant situation. The purpose of the statistics is to show changes in the size and value of the total production of milk (table 6,7,8,9).

Romania's natural potential for animal breeding

Having a total surface of 238,000 km² and a population of 19,041 million inhabitants, Romania holds 6% of the total surface of the European Union and 4% of its population (European Union, 2014). The generous resources of good-quality land constitute important national advantages for generating a significant development and for restructuring the agriculture and livestock sector, which, unfortunately, are insufficiently capitalized. The pastures, representing plots of land covered

with grasses and used as grassland or hay fields, occupy an important surface in Romania, estimated at about 4.9 million hectares (The National Institute of Statistics – NIS, 2014). Approximately two thirds of these surfaces are used for grazing, the rest are being used to obtaining hay, which is destined to feed the animals in cold season. The pastures represent one third of the agricultural land and almost 20% of the total surface of the country. As compared to Europe, where pastures cover approximately 50% of the agricultural land, in our country, the surface of the pastures was reduced during communism because of fallowing and the introduction in the arable circuit. The fallowed surfaces have been used for agriculture and they have been tilled with potatoes, beet or annual crops for the fodder base. In the current conception of the European Union, pastures constitute a major element of the sustainable agriculture systems represented by: animal welfare, fodder supply, soil quality and optimal use of less productive land.

A part from the crucial role of ensuring fodder for animals, pastures also play an important part in rural development and the protection of the environment. Thus, pastures and hay fields play an important role in fixing carbon into the soils and reducing the concentration of CO₂ from the atmosphere, by using nitrogen better, in improving the quality of the scenery, in conserving biodiversity, in increasing soil fertility, in preventing floods and landslides, or in managing water. (ADER132, 2013).

After the 1990's, in Romania there haven't occurred major transformations of the surfaces occupied by pastures into arable farmland. According to the data presented by the NIS (2014) the surfaces occupied by pastures in Romania (2008 – 2013) are indicated in table 1. There hasn't been a significant change of the surfaces occupied by pastures in our country lately. By means of a rational exploitation, the Romanian pastures could ensure food for at least 8 million cattle and 20 million sheep (Recolta.eu, 2011).

Breeding animals for milk, meat, wool represents a traditional activity for the rural population, practised mainly in household farms, family farms, for own consumption. Table 2 and 3 show the main breeds of cattle and sheep used for milk and meat production in Romania are presented in table 2.

One may easily notice from the data presented in the table 2 that the traditional, Romanian cattle breeds (Romanian spotted, Romanian black spotted, Brown) have an average milk production of about 3-4000 kg./lactation, which is obviously inferior to the highly-productive imported breeds (Frieze, Simmental), raised in intensive production modern farms. The quality and quantity of the milk obtained at the farm greatly depend on the breed, the feeding and caring manner, health, age, the period of lactation, season, milking and storage

conditions. (Rotaru and Stanciu, 2007). The milk obtained in households present superior organoleptic qualities, generated by the breeds and the animal natural feeding manner. Although milk chemical composition generally corresponds to the rules imposed by processors, there are still major problems linked to the high microbiological load resulted from improper milking and storage conditions, thus fostering the import of large quantities of raw milk.

From the 1st of January 2014 the European regulations regarding farm-produced milk quality took effect. According to the Sanitary Veterinary and the Food Safety National Agency NASVSA (2014), raw milk can be marketed directly to the end consumer only by complying with the provisions of the sanitary veterinary legislation in force regarding the total number of germs (maximum 100,000/ml.) and of somatic cells (400,000/mL).

In Romania, the breeding of sheep is traditionally made in the mountains. The main breeds of sheep from our country are for milk, meat, wool; there exist only a few farms specialised in breeding sheep only for milk.

Table 4 shows the data published by the Ministry of Agriculture and Rural Development (MARD, 2014) regarding the cattle number and cow milk production evolution. The lack of a Romanian animal breeding development strategy for each breed has led, in the last five years, to an important decrease in the number of animals (-18%) and in the quantity of milk production for consumption (-22.35%). The lowest values were recorded in the crisis period (2008 - 2010), followed by a slight change for the better in the last years. Romania, one of the greatest forces in the domain of animal breeding, has become an importer of food products, although, by tradition, it is one of the countries that foster ideal conditions for animal breeding. The annual average milk production per cow is between 2500 and 3600 l. This is also a weak point for Romania as compared to other countries of the world. Therefore, according to the FAO data, quoted by Vidu (2002), the first place in the world as far as milk production per cow is concerned is occupied by Israel, with 8444 kg. of milk/cow, followed by the USA with 7690 kg. of milk/cow, Japan with 6552 kg. of milk/cow and Canada with 6225 kg. of milk/cow.

In the analysed period, the sheep and goat breeding sector recorded a genuine revival, especially in the total number of animals. Live meat production constituted one of the main animal products exported by Romania. Between 2008 and 2013, the number of sheep increased from 8882 to 9136 thousands. The number of goats increased with almost 50%, from 898 to 1313 thousands, the goat and sheep sector being the only one which seems not to be affected by the 2010 crisis (table

10). The market demand for goat/sheep milk products represented a powerful incentive for producers, fact which led to an increase in the quantity of milk with over 200 thousand hl. The sheep breeding sector has registered a positive trade balance in the last few years, thus satisfying the domestic consumption need and creating availability for export.

By comparing the national milk production to the other countries from the community space, Romania occupies modest places in the analysed period, succeeding in outrunning only its Balkan neighbours (Greece, Bulgaria), or countries that have by far more inferior agricultural areas (Estonia, Slovenia).

Milk production decrease is due to the decrease in the number of animals, to the migration of the workforce from the rural areas, to the dissipation of the livestock in households or small farms, to the poor organisation of the sector, to competition and the regulations imposed by the European community. Thus, when Romania joined the EU, it was forced to cut milk production from 5 million tons of milk per year to a maximum of three million tons of milk per year. Out of this quantity, two million tons were earmarked for direct sale, and one million tons for delivery to the processing plants. Producing more milk involves penalties of 278.3 euros for each extra ton of milk. The production of smaller quantities of milk involves a decrease in the next few years. According to Osman (2012), the common agricultural policy affects mainly the traditional micro-farms that do not succeed in complying with the European standards for medium and large producers. The production potential, targeted by the MADR leadership, is represented by the holders of 20-50 animals, and respectively 50-100 animals, and not by the small producers.

The organisation of this sector is poor and does not answer to the European standards regarding milk quality. According to the data presented by V duva (2014) in the journal *Recolta.eu*, in 2013, the number of authorised/registered farms, which deliver raw cow milk to be processed, is of 2,044, the great majority being in compliance with the requests of Section IX from the European Statute 853/2004.

Out of the total of milk delivered to processing plants, 2.2% do not comply with the criteria imposed for raw milk in Section IX from the European Statute 853/2004.

The milk needed for processing

The milk quota allotted to Romania for processing was of 1.2 million tons in 2013, out of which domestic production being of 880,000 tons, the deficit of 320,000 tons being covered from imports. Over 60% of the milk processors are in

Transylvania, an area which is well-known as a big "milk pool" in Romania.

The daily milk need of processors is of over 2,410 tons, out of which almost 137 tons of raw milk is imported, according to SPOT, whereas 2,273 tons of raw milk are produced in Romania.

The newest price weighted average of the raw milk produced in Romania is 1.51 lei, while our neighbours sell milk at 0.35 eurocents. In December, the SPOT milk price was of 0.52 eurocents.

Romania is importing more and more milk. According to the NIS data, in 2013, the quantity of cow milk collected at the processing plants decreased with 8784 tons (-1%) as compared to 2012. In the same period, the quantity of imported raw milk increased with over 62%, from 59267 tons in 2012 to 96240 tons in 2013.

Romanian exports are few, being done mainly by the large processors (Danone, Friesland) that are looking for new markets in Central and Eastern Europe. Table 5 and table10 presents the situation of domestic milk and dairy product exports. Romania mainly exports cheese and concentrated dairy products that have a high value and a high degree of processing as compared to the other products.

New rules regarding milk and dairy product production and marketing in Romania

From the 1st of January 2014, as a consequence of the end of the transition period granted to Romania in order to improve raw milk quality, Romanian producers must meet the quality conditions imposed by the European standards. According to NASVSA's decision (2014), the small producers (the households) or milk cow farms can deliver the raw milk to the milk collection centres or directly to the milk processing plants. In order to market the raw milk towards the end consumer, there will be some supplementary regulations, as compared to 2013 that must be obeyed. Therefore, there will be obeyed the provisions of the sanitary veterinary legislation in force regarding mainly the microbiological load – the total number of germs (max. 100,000/ml.) and the somatic cells (400,000/ml.). The raw milk meant for direct sale to the end consumer, or its processing into cheese, must come only from healthy animals, which do not suffer from diseases that can be transmitted to people by drinking the animal's milk. The producers who sell raw milk directly to the end consumer in markets must have health cards that must state the good health condition of the animal from which the milk comes, filled in by veterinarians from the original villages, and a report that must certify the product's compliance with the requests of the legislation. Milk and cheese marketing by farmers in food markets and in fairs is done only on the basis of the sanitary

veterinary registration documents, issued by the county's DSVSA, according to the provisions of the NASVSA Ordinance No. 111/2008. The milk and cheese obtained by farmers must be safe for the consumers' health. The official veterinarians that ensure the supervision of food markets will check the manner in which are obeyed the sanitary veterinary conditions regarding milk and cheese transport, storage and marketing.

Raw milk direct sales towards the end consumer by means of vending machines are regulated by NASVSA's Ordinance No. 55/2010, which states the sanitary veterinary conditions in which raw milk direct sale can be done by means of vending machines.

Table 11 presents the situation of the sanitary veterinary authorised and verified units by NASVSA at the beginning of 2014. The legislature stipulates that if upon reception there will be found some non-compliant milk; the milk processing plants have the possibility to process it into cheese, with a maturation period of at least 60 days, in accordance with the European legislation.

Conclusions

The Romanian territory has a significant natural potential, represented by large areas of pastures and hay land, qualified personnel and animal breeds adapted to the natural conditions from Romania. The Romanian raw milk production sector is fragmented, being mainly made up of producers owning small farms, in which there are only 1-3 milk cows. Sheep and goat breeding represents a slight increase, but this increase can be affected by the critical incidents from the market. (ESP, Bluetongue) – table 3. The negotiations that took place before Romania joined the European Union disfavoured the Romanian milk sector, the imposed quotas not being correlated with the indigenous production potential. The support of the government is mainly declarative, without the implementation of some concrete measures, which could support Romanian producers. The lack of reaction of the Romanian officials and the poor competition that exists among Romanian farmers will lead to an ever higher dependence on imports.

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Appendix

Table no 1.
Surfaces occupied by pastures in Romania 2008 – 2013 (ha)

	2008	2009	2010	2011	2012	2013
<i>Pastures</i>	3333028	3313785	3288725	3279251	3270610	3273961
<i>Hay fields</i>	1532342	1528046	1529561	1554680	1544957	1541854
<i>Total</i>	4865370	4841831	4818286	4833931	4815567	4865370

(Source of data: NIS, 2014)

Table no 2.
Breeds of cattle for milk in Romania

	Average duration of lactation (days)	Average production of milk/ lactation(kg)	Average content of milk fat (%)	Fodder conversion (UN/kg of milk)	Observations
<i>Romanian spotted</i>	340-380	3500-4000	3,8	1,2	<i>Mixed breed (Grey steppe – Simmental)</i>
<i>Romanian Black Spotted</i>	300-360	>4500	3,8	1,0 - 1,1	<i>Mixed breed (Frieze – Dobrogea red/Spotted/Romanian spotted/Pinzgau)</i>
<i>Brown</i>	320-370	>3500	3,75	1,15	<i>Unimproved native breed</i>
<i>Transylvanian Pinzgau</i>	320 -350	1500 - 3000	3,85	1,6	<i>Grey steppe/Mocanița - Pinzgau</i>
<i>Frieze</i>	280-300	>6000	4,05	0,9	<i>Israeli Frieze – Holstein Frieze</i>
<i>Simmental</i>	300-330	4500-5000	4	1,0	<i>Imported breed</i>

(Source of data: Acatinc i, 2004)

Table no 3.
Sheep breeds for milk in Romania (Source of data:Gazeta de Agricultura, 2014)

	Average duration of lactation (days)	Milking period (days)	Average production of milk/ lactation (kg)*		Average content of milk fat (%)	Observations
<i>Palas Merinos</i>	132	40-69	130	20-30	5,4	<i>Breed for milk/meat/wool</i>
<i>Transylvanian Merinos</i>	170	50-60	80-90	15-25	5,3	<i>Breed for milk/meat/wool</i>
<i>Țigaie (Sheep with prime wool)</i>	180	50-60	80-90	30-35	6,4	<i>Breed for milk/meat/wool</i>
<i>Tzurcana sheep</i>	180-200	120-150	100	50-65	7,0	<i>Breed for milk/meat/wool</i>
<i>Karakul</i>	180	120-150	65	40	7,6	<i>Breed for skin/milk</i>
<i>Freize</i>	200	100-150	400-700	200-300	6,4	<i>Breed specialised for milk production</i>

Note The data from the first column represent the total quantity of milk produced in the lactation period, whereas the data from the second column represent milk production after the weaning of the lambs

Table no 4.
The dynamics of the source cattle and of milk production 2008 – 2013

Specification	UM	2008	2009	2010	2011	2012	2013
<i>Total number of cattle out of which</i>	<i>thousands</i>	2684	2512	1.985	2.130	2164	2197
<i>Source cattle</i>		1.639	1.569	1.282	1.312	1.352	1.369

Average milk production	l/cow	3.653	3.807	2.595	3.529	3.417	3.385
Total milk production	thousands of	53.089	50.570	42.824	43.807	42.036	42.600
Goods production	hl	28.197	25.310	17.433	22.321	21.462	21.894

(Source Ministry of Agriculture and Rural Development, 2014)

Table no 5.
Romanian milk and dairy product exports 2008- 2012 (thousands of euro)

	2008	2009	2010	2011	2012
Milk and cream from milk, non-concentrated, without added sugar or sweeteners	1004	1390	1703	3957	6126
Milk and cream from milk, concentrated, with added sugar or sweeteners	13443	12219	16542	22148	18399
Fermented milk products	2281	2412	2784	4591	8942
Whey and whey products	33	147	609	1175	1841
Butter and other fat milk products	152	294	1151	1662	1436
Cheese and green ewe cheese	5095	7232	14180	13378	27693

(Source of data NIS - TEMPO online, 2014)

Table no 6.
Milk production evolution in the main EU countries (thousands of hl)

Country	2008	2009	2010	2011	2012	2013
Austria	2705	2709	2781	2904	2964	2688
Denmark	4586	4740	4818	4787	4916	4601
France	23814	22842	23361	24602	24534	22357
Germany	27465	28248	28659	29339	29702	27761
Greece	690	684	688	638	664	600
Ireland	5106	4904	5327	5537	5380	5390
Italy	10608	10506	10604	10882	10876	9803
The Netherlands	10936	11085	11626	11642	11676	11171
Total EU - 15	115332	115006	117600	120351	120618	11850
The Czech Republic	2433	2354	2317	2366	2446	2187
Estonia	614	592	619	624	665	646
Hungary	1425	1407	1322	1308	1398	1235
Lithuania	1382	1276	1278	1317	1360	1237
Poland	9112	9136	8990	9296	9843	9102
Slovakia	946	852	800	811	851	759
Slovenia	524	517	519	526	535	475
Total EU 10	17263	16916	16657	17089	18007	16460
Bulgaria	681	578	539	499	497	455
Romania	1053	979	901	892	884	811
Total EU 2	1734	1558	1440	1391	1381	1266
Total EU 28	134976	134155	136321	139467	140608	130042
A comparison with the previous year		-0,67%	1,61%	2,37%	0,82%	0,72%

(Source of data: Eurostat database, 2014)

Table no 7
Raw milk collection centres, households and total number of animals

	2012	2013
Registered/authorised farms, out of which:	2388	2044
- comply with the criteria	2162	1902
- do not comply with the criteria	226	142

<i>Farms with milk cows</i>	90418	100952
- <i>1-3 animals</i>	68399	84217
- <i>more than 3 animals</i>	22019	16775
<i>Total number of animals (heads)</i>	-	277 12
- <i>in farms with 1-3 animals</i>	-	163319
- <i>in farms with over 3 animals</i>	-	114193
<i>Collection centres, out of which</i>	1156	1148
- <i>comply with the criteria</i>	1036	1084
- <i>do not comply to the criteria</i>	120	64

(Source of data V duva, 2014)

Table no 8.

Average raw milk price evolution at a farm 2008-2014 (euro/1000 l)

Product	2008	2009	2011	2012	2013	Trim. I 2014	Trim. II 2014
<i>Fresh cow milk</i>	19.6	20	24	24.7	26.7	27.8	27.6
<i>Fresh sheep milk</i>	32.7	31.3	40.2	41.6	35.6	-	40

(Source of data NIS - TEMPO online, 2014)

Table no 9

Milk and dairy product imports in Romania 2008- 2012 (thousands of euro)

	2008	2009	2010	2011	2012
<i>Milk and cream from milk, non-concentrated, without added sugar or sweeteners</i>	31686	38881	50754	56619	54622
<i>Milk and cream from milk, concentrated, with added sugar or sweeteners</i>	17608	18862	17999	21874	22042
<i>Fermented milk products</i>	14246	18149	19695	19128	21402
<i>Whey and whey products</i>	7611	6438	6792	6776	8234
<i>Butter and other fat milk products</i>	19528	22108	17157	16307	14307
<i>Cheese and green ewe cheese</i>	84516	77306	81350	100078	102631

(Source of data NIS - TEMPO online, 2014)

Table no 10

The dynamics of the number of sheep/goats and of the milk production 2008-2013

	2008	2009	2010	2011	2012	2013
<i>Sheep (thousands)</i>	8882	9141	8417	8533	8834	9136
<i>Goats (thousand)</i>	898	917	1241	1236	1266	1313
<i>Total (thousands)</i>	9.780	10.059	9.658	9.770	10.100	10.449
<i>Total milk production (thousands of hl)</i>	5.917	5.813	6.305	6.127	6.301	6.135

(Source of data NIS- TEMPO online, 2014)

Table no 11

Milk processing plant situation

	No. of plants	Observations
<i>Plants that benefited from the transition period, out of which:</i>	64	<i>List published on the NASVSA site, at the section Plants approved for intra-community exchange, unit 9 – Raw milk and dairy products</i>
- <i>plants that process compliant milk</i>	51	
- <i>closed plants</i>	13	
<i>Approved milk processing plants, authorised from a sanitary veterinary point of view for intra-community trade</i>	168	

(Source of data NASVSA, 2014)