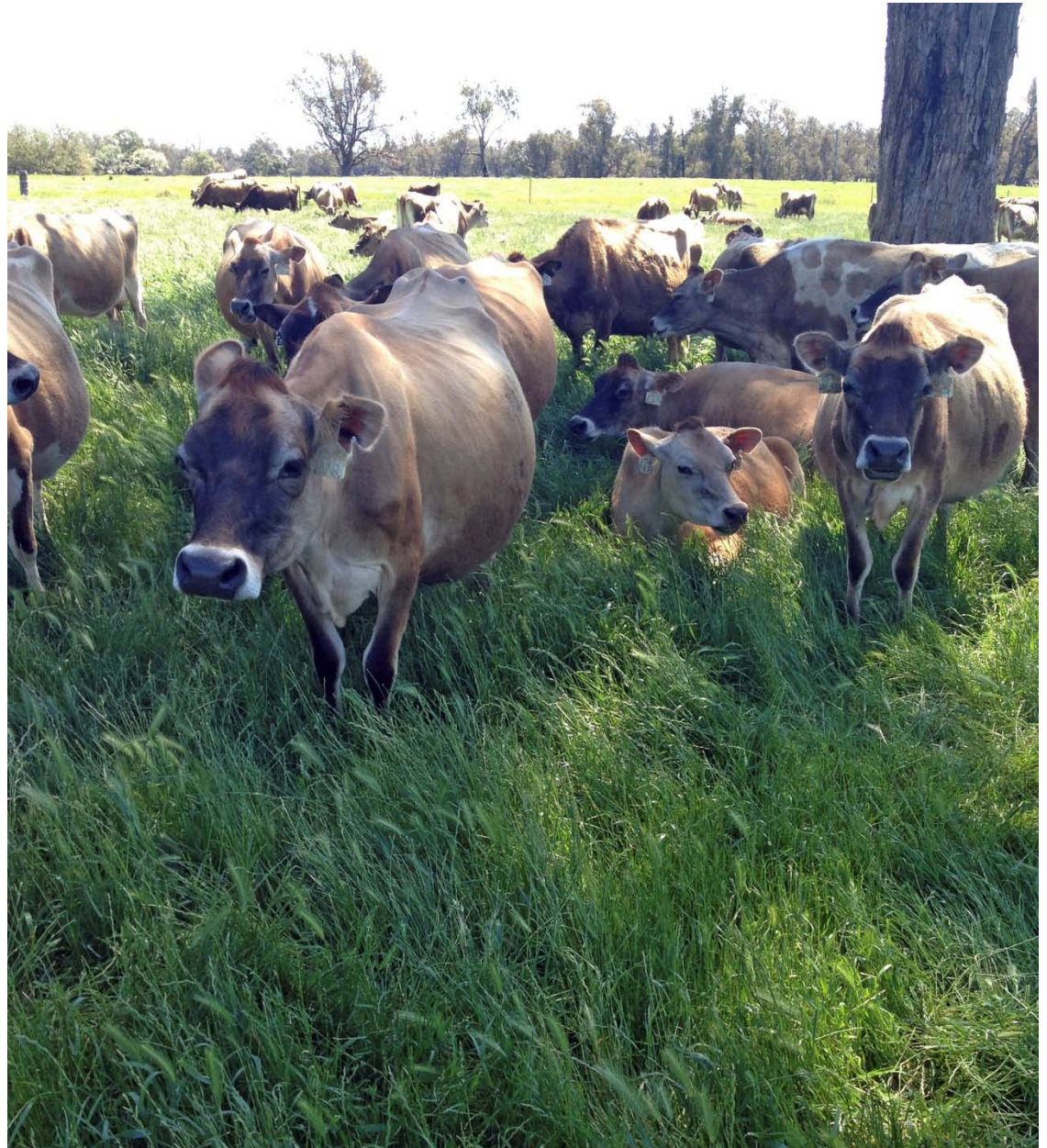


## Wereldwijde informatie over melkveehouderij

19 november 2013, Michel de Haan



For a better understanding of milk production world wide



LIVESTOCK RESEARCH  
WAGENINGEN UR

# For a better understanding of milk production world wide



# For a better understanding of milk production world wide





# For a better understanding of milk production world wide



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# Inhoud

- IFCN (wie, wat, waarom?)
- Onderwijs (kostprijverschillen, melkprijs en – melkproductie)
- Resultaten 2012



# Wat is IFCN?

- International Farm Comparison Network
- [www.ifcnnetwork.org](http://www.ifcnnetwork.org)







**Afghanistan**



**Indonesia**



**Our mission: Create  
a better understanding  
of milk production  
world-wide**



**South Africa**



**Jordan**



**Indonesia**

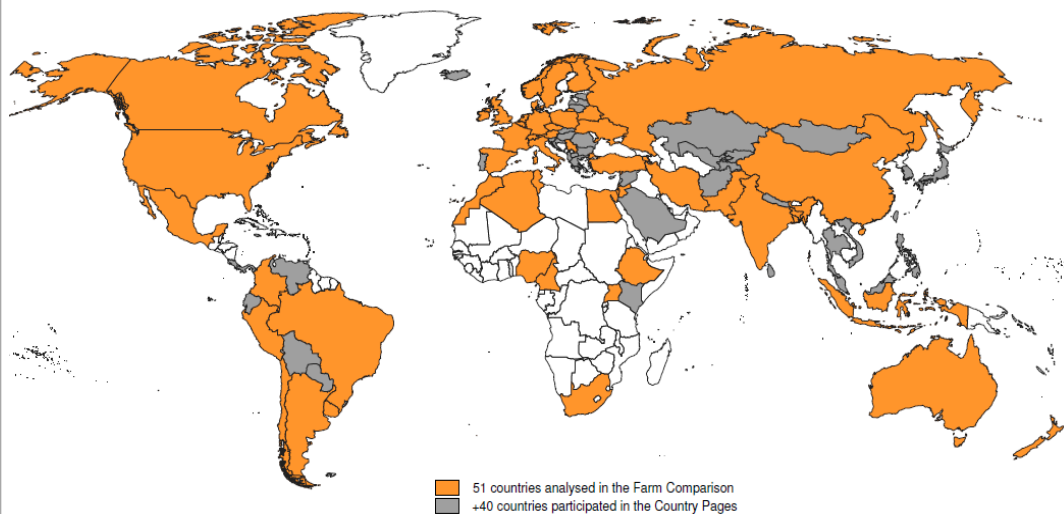


**Malaysia**



# Status of the IFCN Network in 2013

## 91 countries analysed in Dairy Report 2012



## Researchers partners from > 80 countries



## 9 Institutional partners



## 99 Agribusiness partners



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## Wat doet IFCN?

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- Monitoren prijzen en bedrijfssystemen
- Benchmarking melkveehouderij mondiaal
- Cijfers vergelijkbaar maken, 'Typical Farms'
- Analyseren bedrijfs- en sectorontwikkelingen
- Personen en informatie bij elkaar brengen
- Kennis delen en conclusies trekken
- Ca 95landen



# Belang van IFCN



We leven niet (meer) op een  
eiland

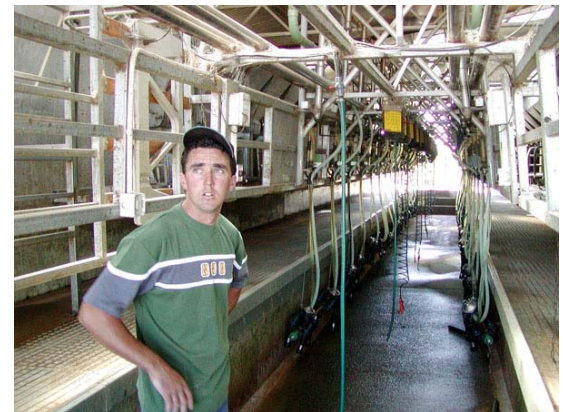


LIVESTOCK

WAGENINGEN UR

# Belang IFCN

- Zicht op mondiale ontwikkelingen
- Kennis van kosten melkproductie per regio
- Melkprijs belangrijk voor concurrentiekracht
- Sterke en zwakke punten eigen regio bekend
- Kennis en inspiratie, alternatieve systemen
- Leren van mondiale ontwikkelingen



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# Inhoud

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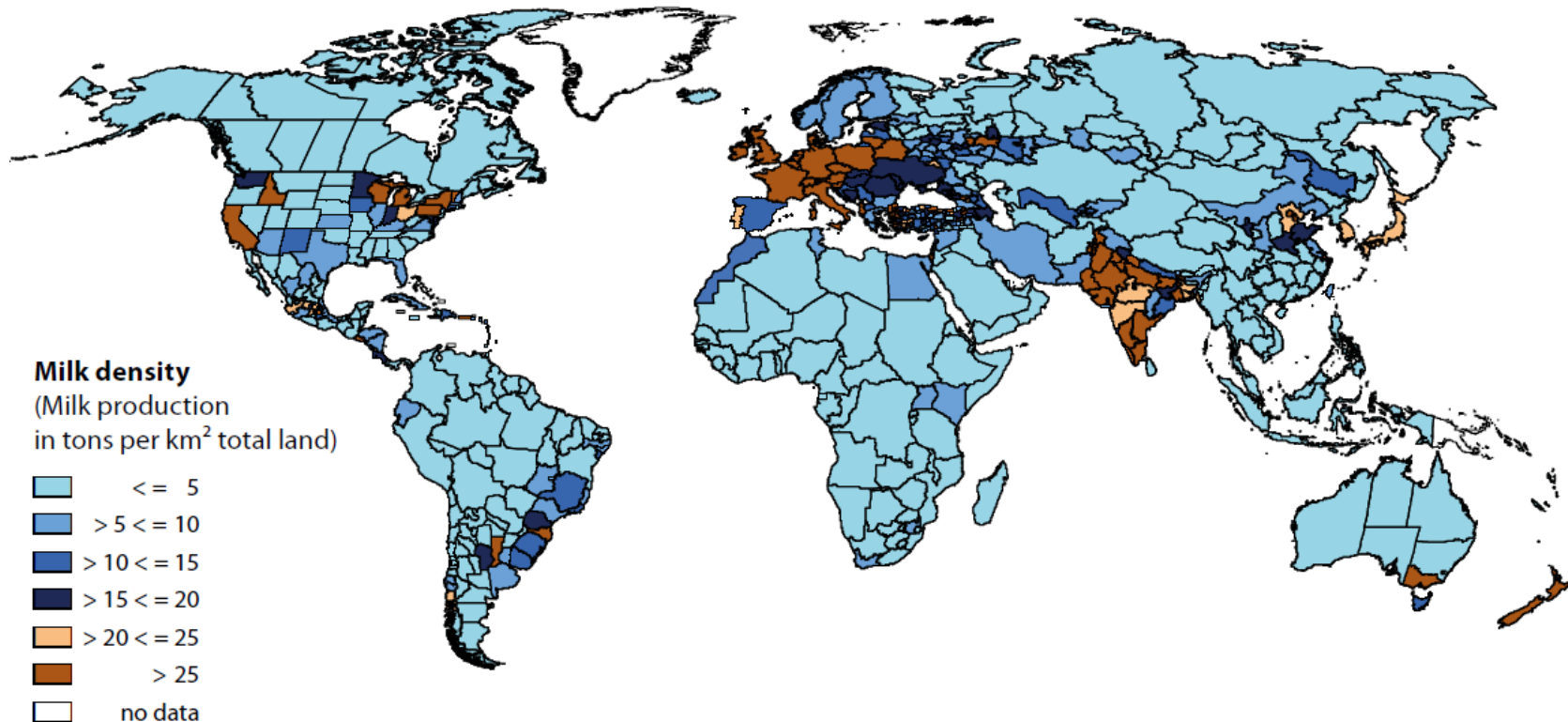
- IFCN (wie, wat, waarom?)
- Onderwijs (kostprijverschillen, melkprijs en – melkproductie)
- Resultaten 2012





# IFCN can define key dairy regions

Milk density in t milk / km<sup>2</sup> land



**Data:** 2010 or if not available 2009 data was taken for CN, IN, TR, 2008 data for AR. Country data in ECM, regional data in natural fat and protein content.

**Source of data:** National statistics, FAO, for some countries estimates.

**Calculation:** Milk production divided by km<sup>2</sup> total land.

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# Wat stuurt de melkproductie?

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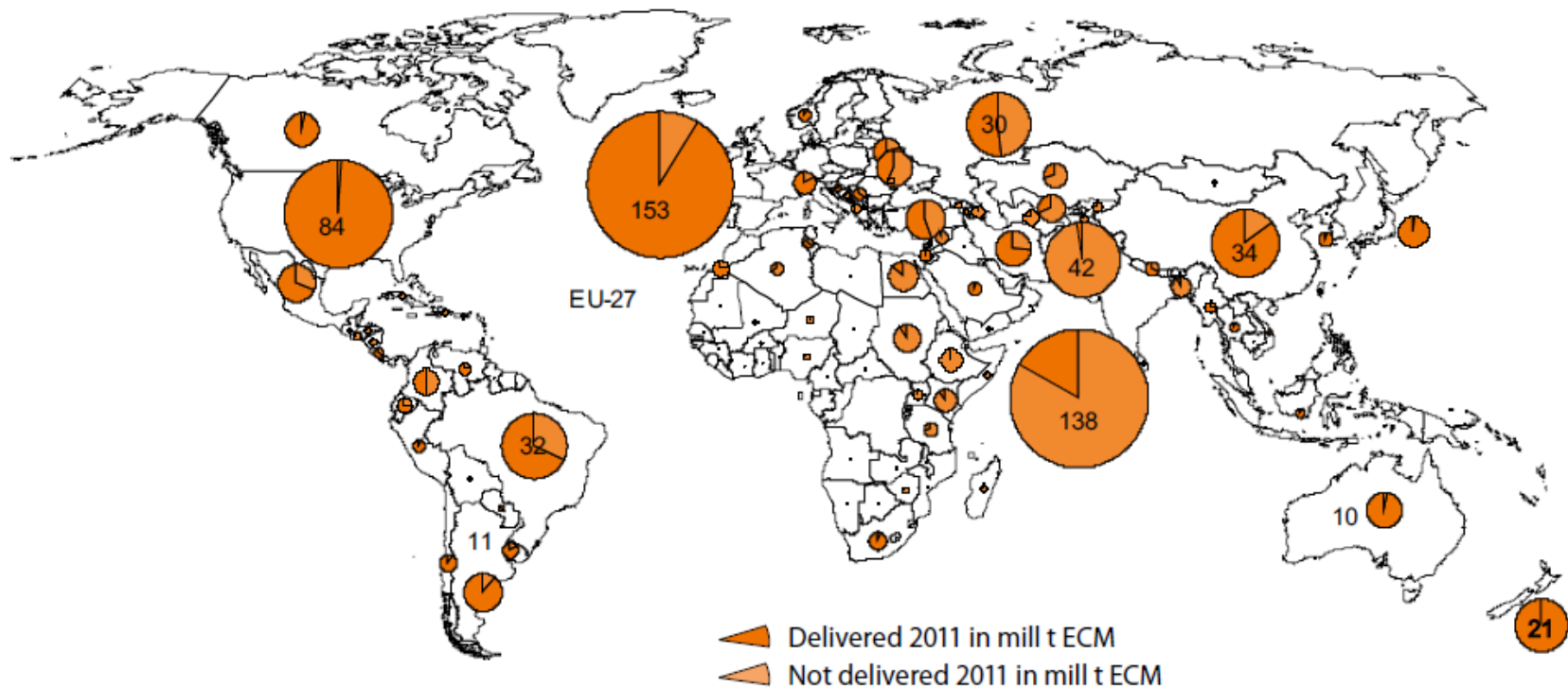
- Klimaat - weersomstandigheden
- Bodem – productie potentieel
- Kracht van de zuivelindustrie
- Beleid
- Technische vooruitgang
- Inkomen – Kostprijs?
- Vraag naar zuivel
- Melkprijs





# Only 62% of milk reaches processors

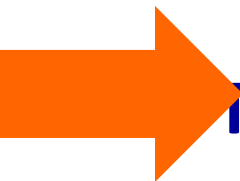
## Status of milk production 2011



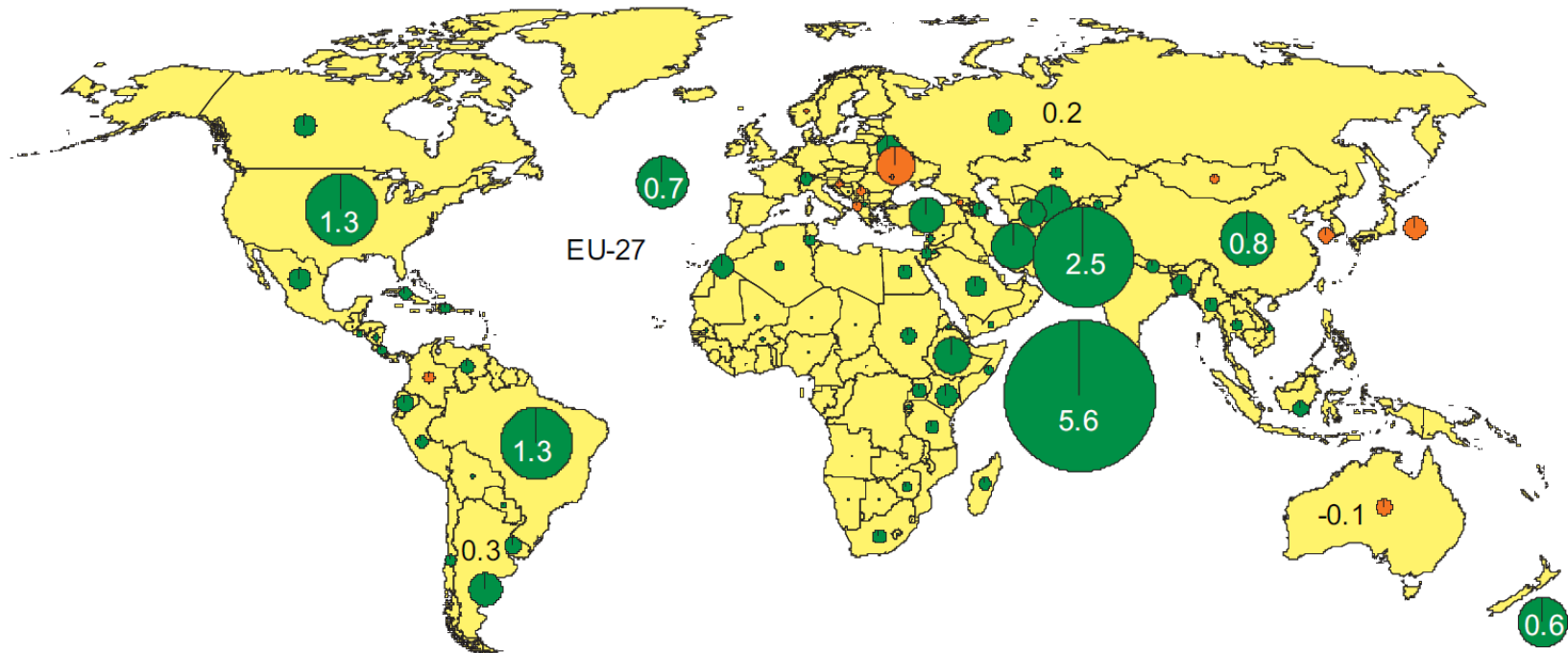
**Data:** Cow and buffalo milk production and milk delivered 2011 in mill t ECM.

**Source of data:** National statistics, AMI, FAO, estimates for some countries. Share of milk delivered estimated for Venezuela, Jamaica, Sudan, Kyrgyzstan, Tajikistan, Turkmenistan, Tanzania, Sudan. Mexico deliveries under validation.

**Comment:** NZ, AU, IN annualised milk production.



# Milk production grew where demand grew change in milk production 2006-2011



▲ 2006 to 2011 milk production increase in mill t  
▲ 2006 to 2011 milk production decrease in mill t

**Data:** Cow and buffalo milk production 2011 and 2006 in mill t ECM per year.  
**Source of data:** National statistics, AMI, FAO, estimates for some countries.  
**Calculation:** (Milk production 2011 minus milk production 2006) divided by 5.  
**Comment:** NZ, AU, IN annualised milk production.



WAGENINGEN UR

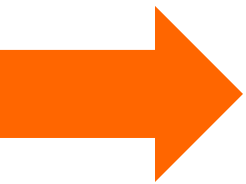
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# Wat stuurt de vraag naar melk?

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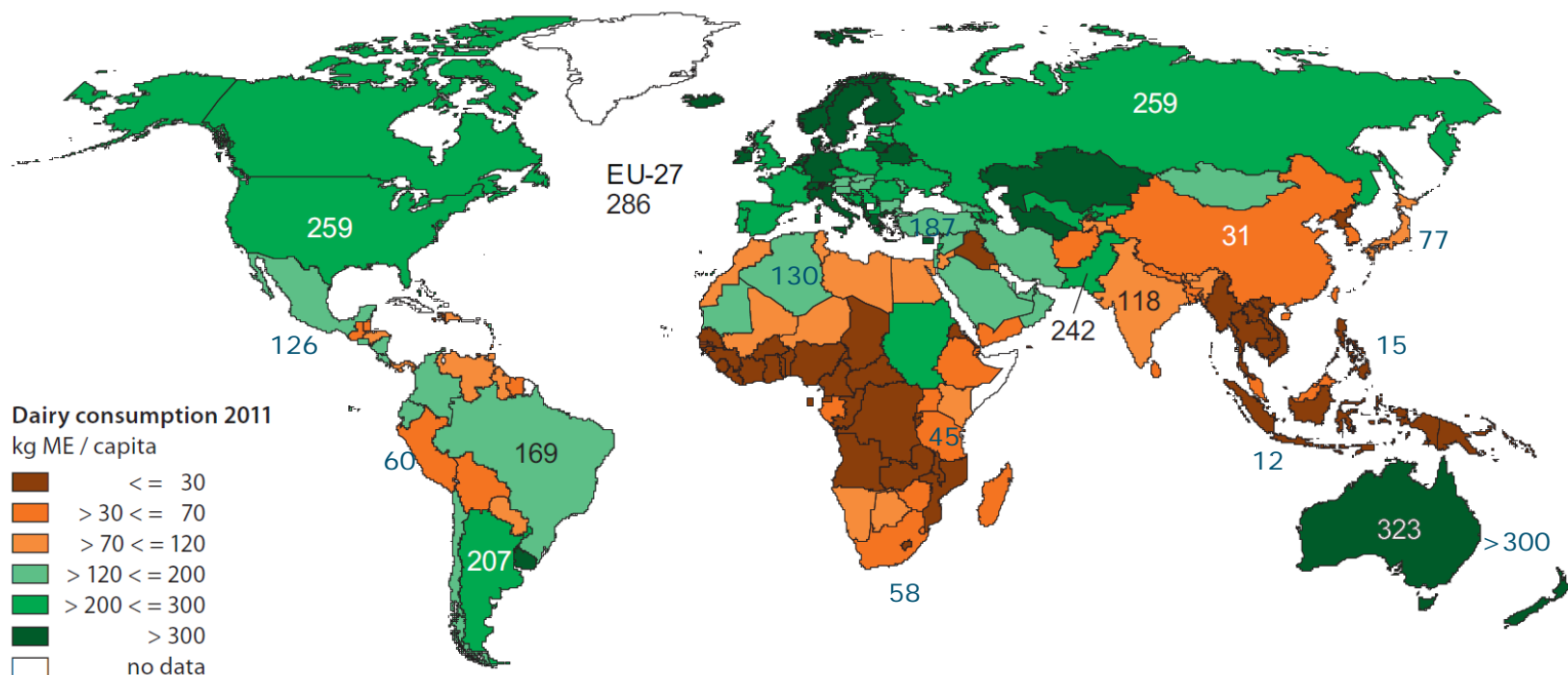
- Bevolkingsgroei
- GDP / inkomen
- Melkconsumptie
- eetgewoontes
- Urbanisatie
- Voorraden
- Melkprijs?





# Comparable IFCN milk demand figures

## Per capita dairy consumption in kg milk equivalents (ME) in 2011



**Source of data:** National statistics, FAO, IMF.

**Calculation:** Dairy consumption = milk production of all milk animals plus import minus export volumes plus or minus stock changes.

Per capita consumption = dairy consumption in the country divided by population.

**Specification:** Milk production data in ECM (Energy corrected milk) standardised to 4% fat and 3.3% protein.

ME (milk equivalent) based on fat and protein only.

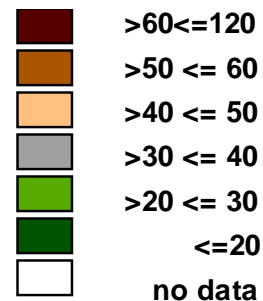


# Annual milk prices in 2012

in US-\$ / 100 kg ECM

World Ø: 38 US-\$ or 29 €/ 100 kg milk

## Milk price 2012 (US-\$/100kg ECM)

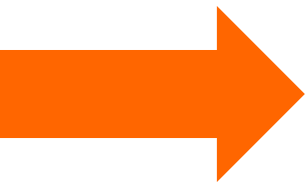


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# Wat beïnvloedt de melkprijs?

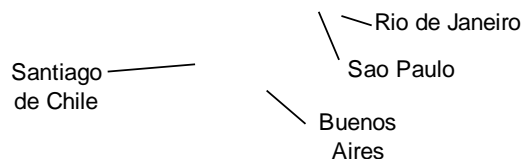
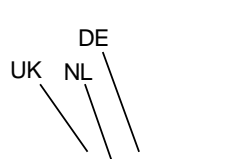
- Vraag naar melk
- Aanbod van melk
- eetgewoontes
- Urbanisatie
- Politiek?





# The key driver for world milk prices

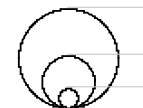
## Milk surplus and deficit by dairy region 2010



Milk deficit in mill. t.  
Milk equivalents



Milk surplus in mill. t.  
Milk equivalents

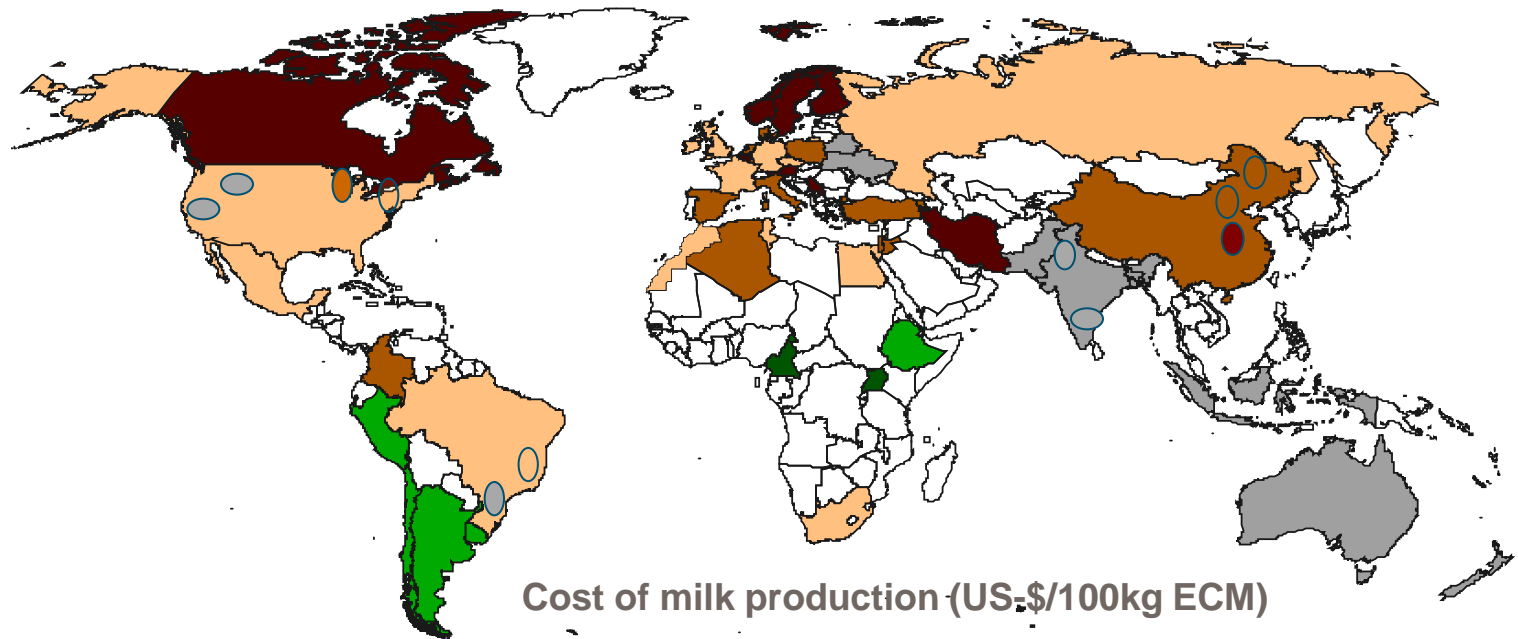


10 mill tons/year  
3 mill tons/year  
0.5 mill tons/year

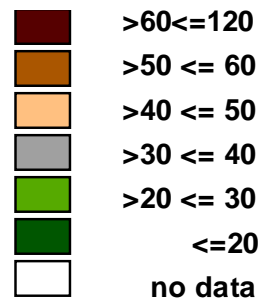


# Cost of milk production only in 2012

## average sized farms



○ Cost level of farms in region where shade is placed





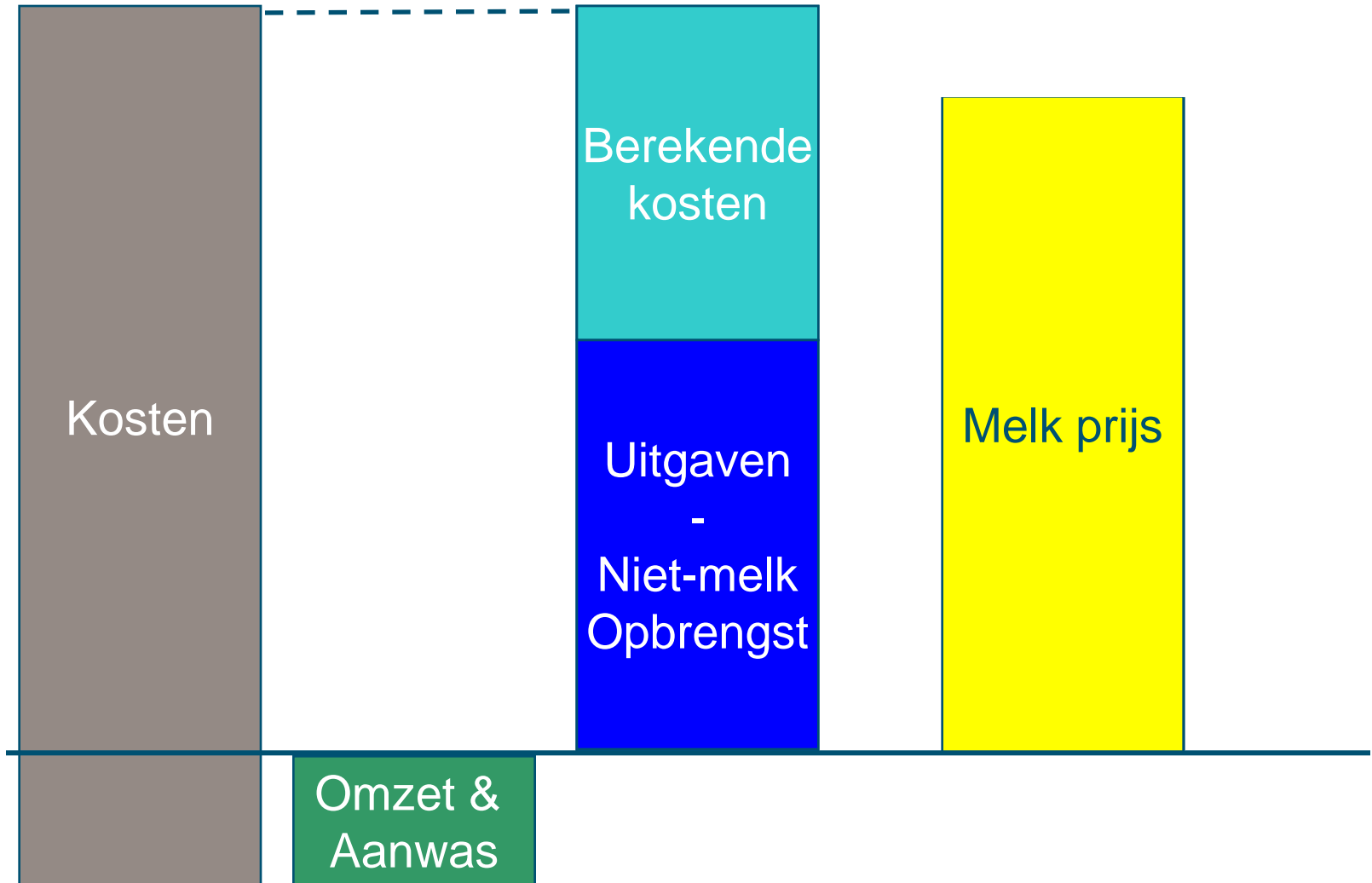
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# Waardoor verschillen in kostprijs?

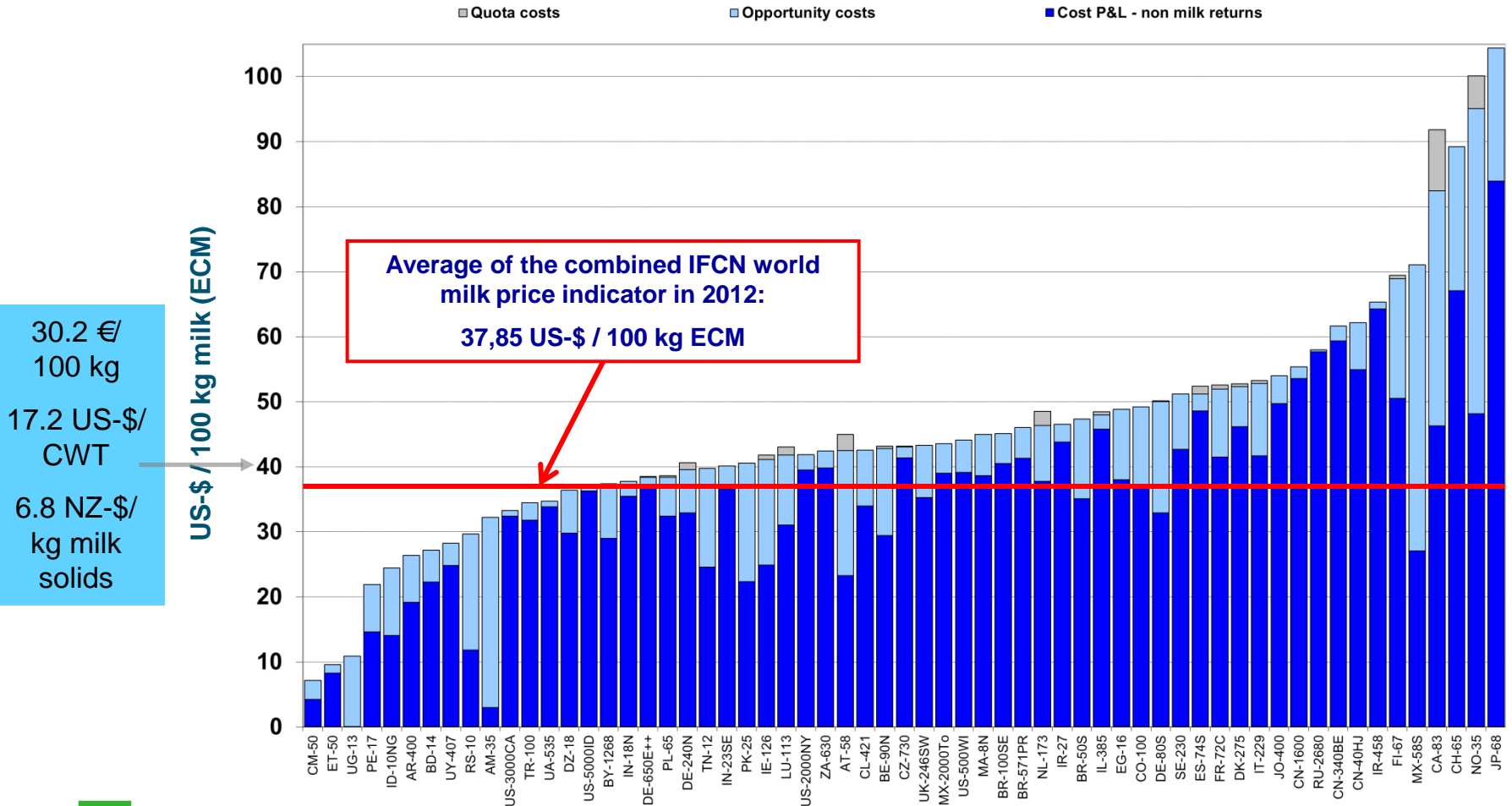
- Verschillende productiesystemen
- Klimaat
- Prijzen van productiemiddelen
- Passie van melkveehouders
- groeipotentie van gewassen
- Mogelijkheid tot weidegang
- Beleid
- Gezinsbedrijf
- ...



# Kostprijs per kg melk



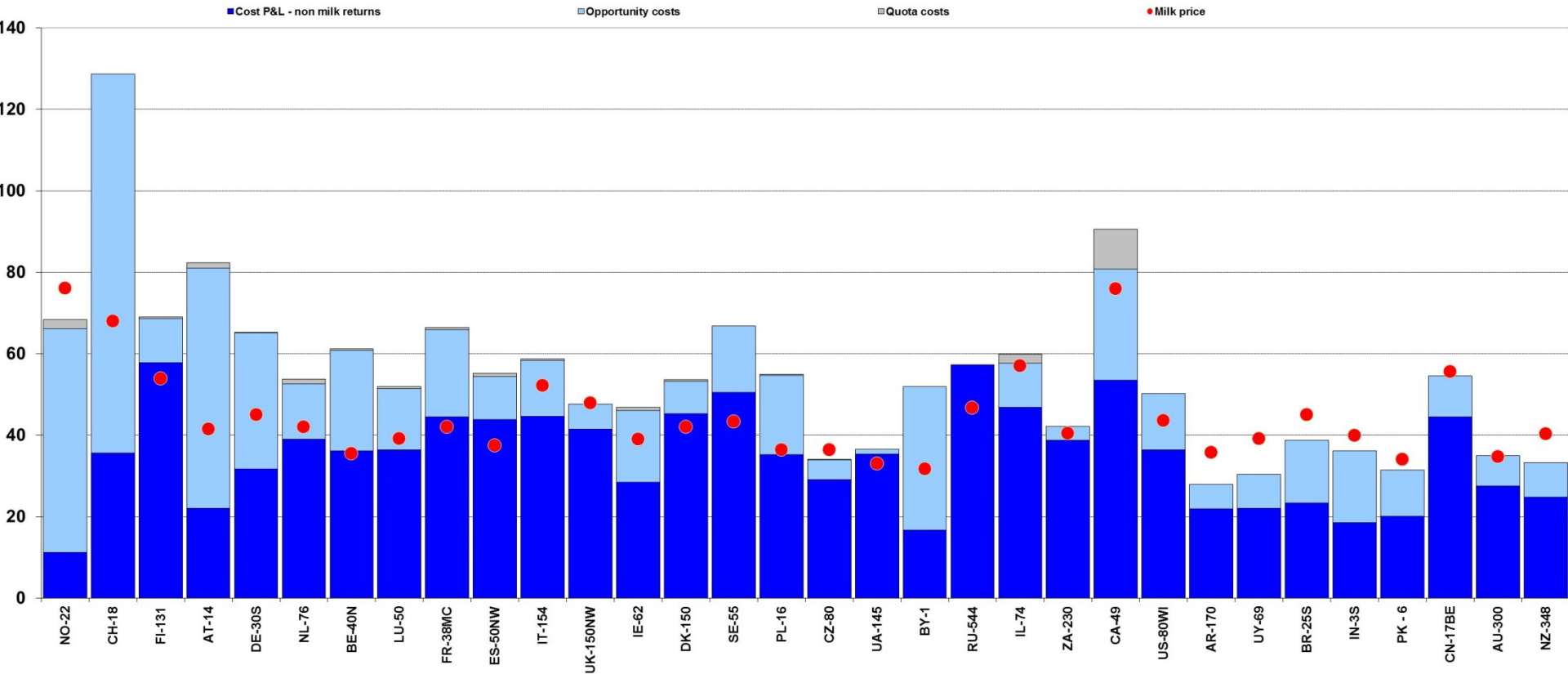
# Cost of milk production on larger farms per country in 2012



FROM AN ENVIRONMENTAL  
POINT OF VIEW, YOUR DAIRY  
FARM IS NOT **SUSTAINABLE!**

IN **MY**  
REGION,  
THAT'S **NOT**  
A PRIORITY!





# Samenvattend

- De rest van de wereld heeft invloed
- Komende jaren grotere vraag dan aanbod van melk
- In Nederland veel melkproductie, kosten en melkprijs hoog
- IFCN levert veel nuttige informatie, ook voor onderwijs



# Toegang tot de wereld

