

# Michel Nalet



---

## Strategie di penetrazione nei mercati mondiali delle imprese lattiero-casearie europee

EU dairy strategies for conquering world dairy markets



european dairy association



## EU Dairy & Export Opportunities - Strategie di penetrazione nei mercati mondiali delle imprese lattiero-casearie europee”.

Michel NALET, EDA President

CLAL, 29 May 2015





**“milk and dairy products are a vital source of nutrition”**



connect to the world of dairy



- **CONNECT TO THE WORLD OF DAIRY:**
- **Association of 22 national dairy industry associations of EU Member States & Serbia**
- **Cooperative and private milk processors represented**



Securing the  
European milk  
base

Uncork the  
potential of the  
European  
markets

Growth in the  
world

***EDA 222***

***Visibility, Impact through Access***

***'Shaping the EU frameworks to allow the dairy industry to grow sustainably'***





## L'impact socio-économique de notre secteur - the economic power of EU dairy













connect to the world of dairy

## The TOP 12 Dairies in Europe



## Milk production in EU10 (in mio tons)

	1984	2014	Evolution (%)
	3.1333	3.702	18
	26.1	25.337	-3
	24.304	31.375	29
	8.266	10.153	23
	293	306	4
	12.525	12.468	0
	5.033	5.112	2
	5.585	5.822	4
	15.762	14.829	-6
	411	619	51
<b>Total</b>	<b>101.412</b>	<b>109.723</b>	<b>8</b>



Source: ZMB

connect to the world of dairy



# Evolution of milk production per capita in EU

	Cows' milk collection (T)			Population			Per capita (kg)		
	1984	2014	Variation %	1984	2014	Variation %	1984	2014	Variation %
Belgium	3,133,000	3,702,000	+18%	9,855,372	11,087,000	+12%	317.9	333.9	+5%
Denmark	5,033,000	5,112,000	+2%	5,111,619	5,629,000	+10%	984.6	908.2	-8%
Germany	24,304,000	31,375,000	+29%	77,858,685	81,254,000	+4%	312.2	386.1	+24%
Ireland	5,585,000	5,822,000	+4%	3,532,423	4,765,000	+35%	1581.1	1221.9	-23%
Greece	411,000	619,000	+51%	9,895,801	11,126,000	+12%	41.5	55.6	+34%
France	26,100,000	25,337,000	-3%	56,489,874	66,201,000	+17%	462	382.7	-17%
Italy	8,266,000	10,153,000	+23%	56,576,718	59,574,000	+5%	146.1	170.4	+17%
Luxembourg	293,000	306,000	+4%	365,998	534,000	+46%	800.1	573	-28%
Netherlands	12,525,000	12,468,000	-0.46%	14,424,211	16,775,000	+16%	868.3	743.2	-14%
United Kingdom	15,762,000	14,829,000	-6%	56,422,072	64,066,000	+14%	279.4	231.4	-17%
EC10	101,412,000	109,723,000	+8%	290,532,773	321,011,000	+10%	349.1	341.8	-2%

EU28		148,884,000			507,970,000			293.1	
------	--	-------------	--	--	-------------	--	--	-------	--

Source: ZMB

connect to the world of dairy

# Evolution of milk production per capita in the World



***Not enough milk production for growing World population***

## Milk volume produced (t)

1984	2014	2020
440,000,000	640,000,000	697,600,000

## Global population

1984	2014	2020
4,757,458,452	7,204,763,000	7,672,744,000

## Milk production (kg) per capita

1984	2014	2020
92.5	88.8	90.9



Source EDA calculation on basis OECD-FAO outlook

connect to the world of dairy

## 2024: EU 1<sup>st</sup> Global Dairy Exporter

➔ 2024 EU milk production

➔ 170 mio tons

➔ Consumption

➔ 145 mio tons



- **Produce for the world market**
- **Produce for the markets all over the world**
- **Brand your produce on the world markets**

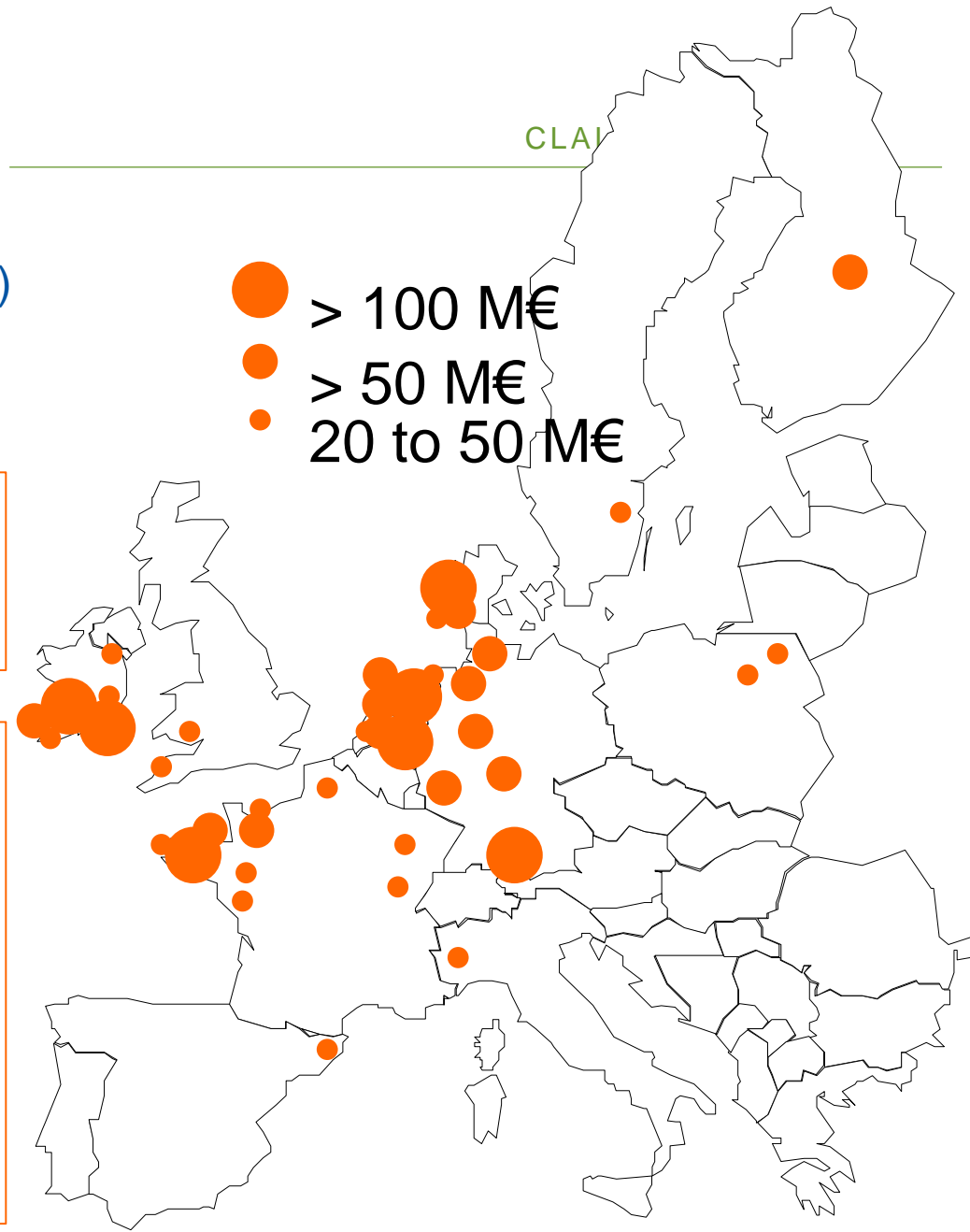


➤ **Produce for the world market**



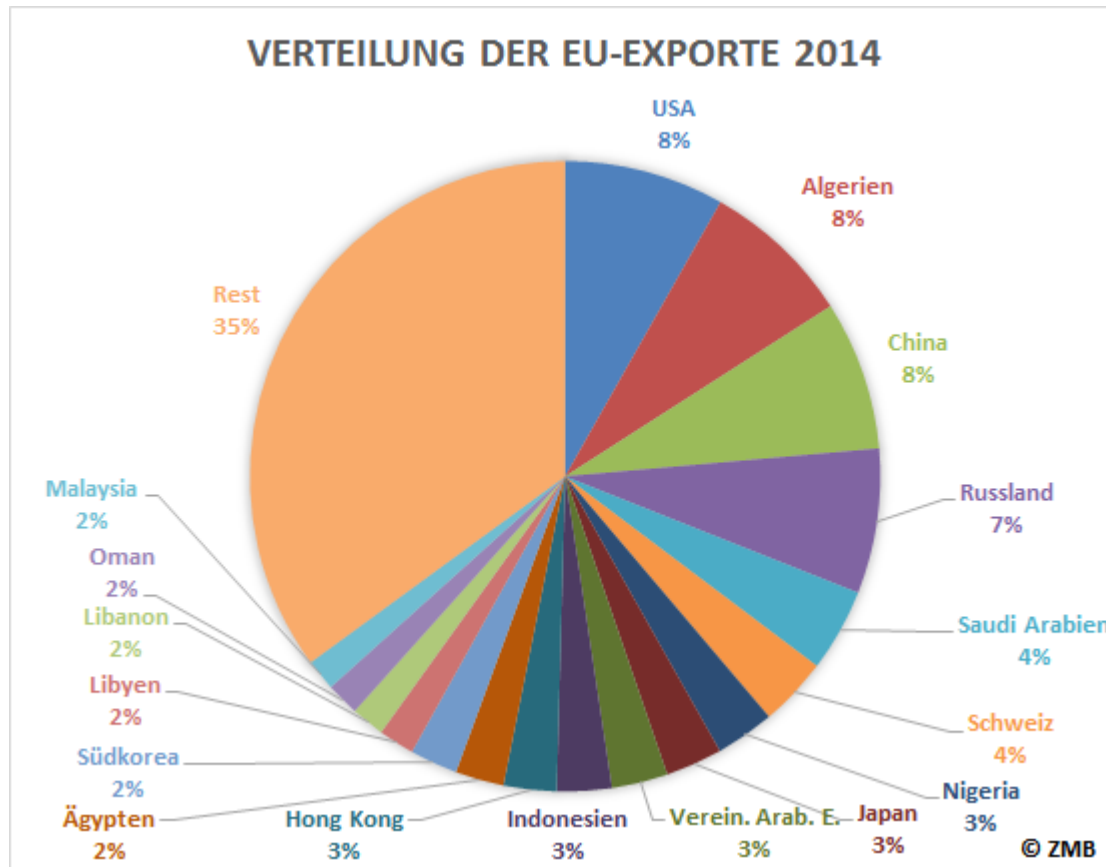


2012 – 2014 milk processing (drying)  
Investments (over 20 mio Euro)



➤ **Produce for the markets all over the world**





➤ **Brand your produce on the world markets**



➤ 3 marques internationales



➤ Des marques multi-pays







➤ Global leader in PDO / PGI cheese (fromages AOC) and raw milk cheese

. 25 PDO / AOC cheeses  
(20 in France, 4 in Italie and 1 in Spain)

. **In France, Lactalis stands for**  
18% of the AOC cheese production and  
52% of the raw milk cheese production



	EU	New Zealand	Australia <sup>1</sup>	US	Argentina (Mercosur)	India	Pakistan	Switzerland
South Korea	7/2011		12-Dec-2014	1/2012				EFTA
India								
Canada		TPP 2012			Americas			EFTA
Mercosur						06/2009	Not yet notified WTO	
Japan	6 rounds	ASEAN	15-Jan-2015					
Malaysia			ASEAN*			ASEAN		EFTA
Ukraine								
Russia/ Customs Union	2	9 rounds <sup>3</sup>						EFTA <sup>4</sup>
China								7/2014
GCC	5			FTA Bahrain		Not yet notified in WTO		EFTA
Norway	1/2012					EFTA	EFTA	
Colombia/ Peru		TPP						EFTA
South Africa					6			EFTA
Switzerland						EFTA	EFTA	
Morocco	7							EFTA
Indonesia		ASEAN	ASEAN*			ASEAN		
Mexico	To be updated	TPP 2012						EFTA
Vietnam			ASEAN*	TPP		ASEAN		EFTA
Thailand	8		ASEAN*	9		ASEAN		10
Singapore		TPFTA	ASEAN*			ASEAN		
Chile		TPFTA						EFTA
Ecuador					11			
Venezuela	12				13			



**“milk and dairy products are a vital source of nutrition”**



connect to the world of dairy



**2015 - A New Start for EU Dairy**

**15/16 October 2015**

**The George Hotel, Edinburgh;**

**[www.eda2015.eu](http://www.eda2015.eu)**