

Future of Dairy after 2015

Kees Romijn
vz LTO Melkveehouderij



- Dutch farmers / horticulture Organization
 - 40.000 members in 16 sectors
- 12.500 Dairy farmers (69%)
- Mission:
Strong economic and social position for our members by promoting appropriate framework for the agricultural entrepreneurship



The Netherlands

- 2,25 smaller than Hungary
- Almost 30% is lower then the sea-level
- River delta
- 16,8 million people
- Trade history



Dairy in NL

- 17.000 dairy farmers
- 1,6 million cow's
- 750.000 ha grass and 150.000 ha maize
- 12 million ton's milk quota
- Farm average
 - 95 cow's
 - 52 ha land



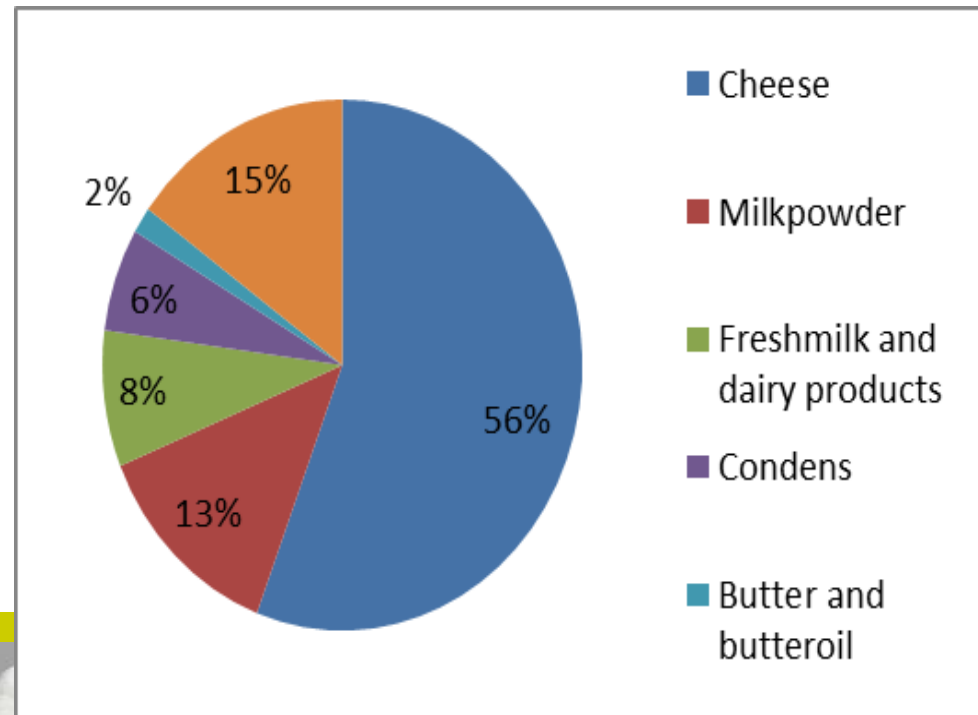
Dairy in NL

- 13 Milk processors collect 98%



- 85% cooperative

- 66% export
 - 2/3 inside EU
 - 1/3 outside EU



Home



Challenges

- Ending milk quota system
 - Milk price
 - Number off farmers
- New Boundary's?
- Image?



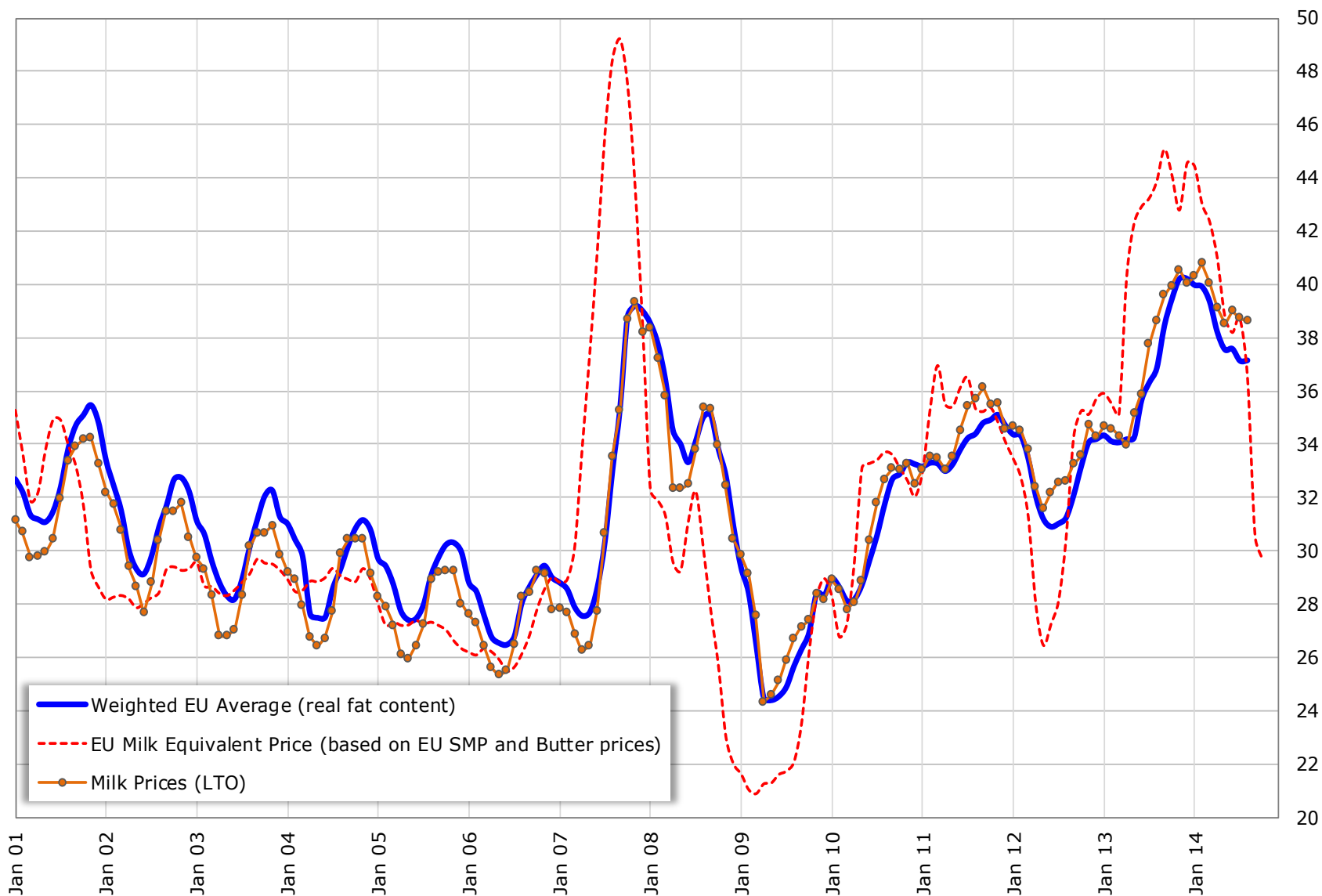
Growing demand for Dairy Products

	2001-2011	2012-2022
World	+2,2%	+2,2%
Asia	+3,3%	+2,9%
Africa	+3,2%	+2,9%
South America	+3,1%	+2,2%
North America	+0,3%	+0,5%
Europe	-/-0,2%	+0,5%



EU Raw Milk Prices Evolution (up to August 14)

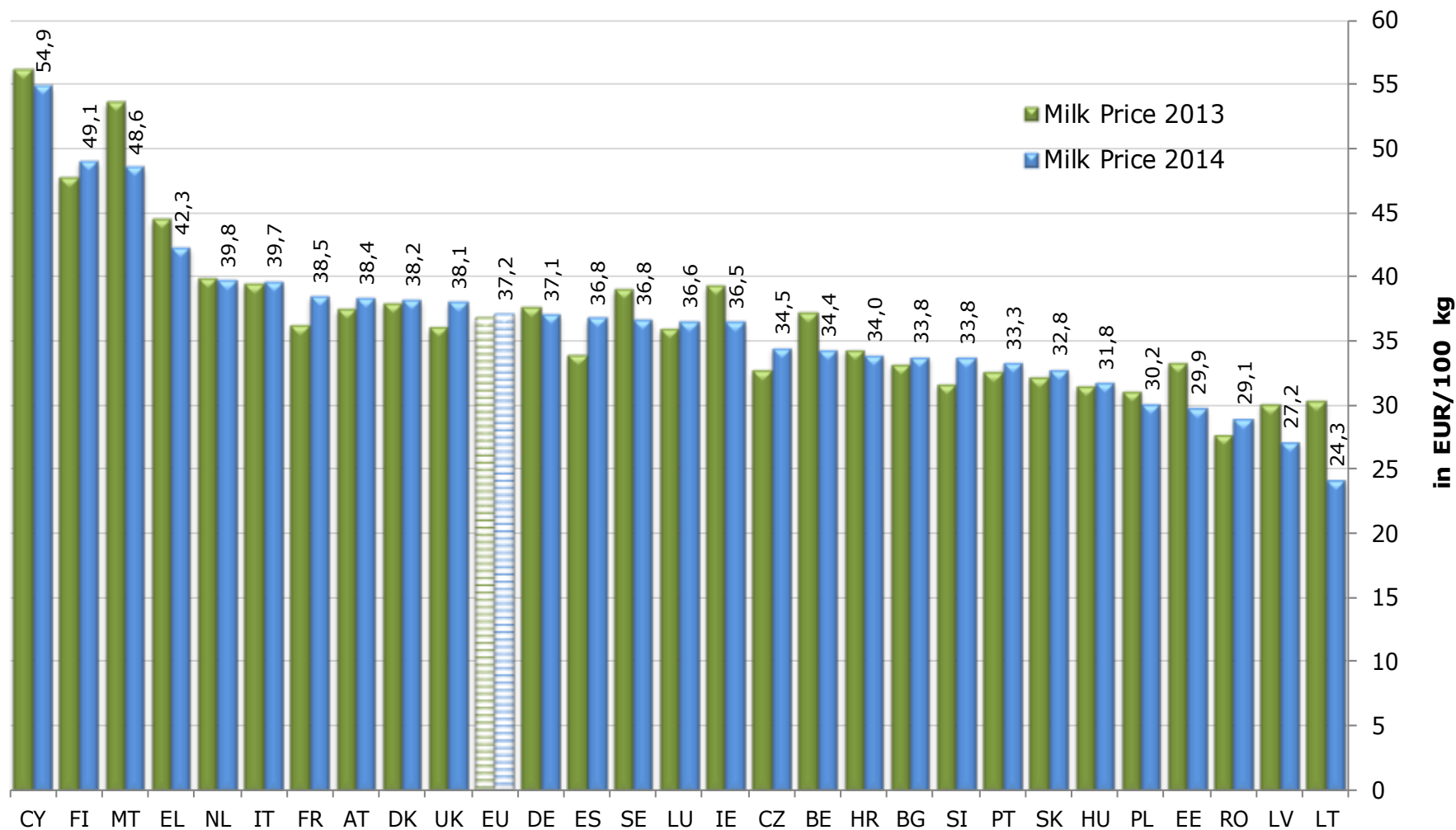
EUR/100 kg



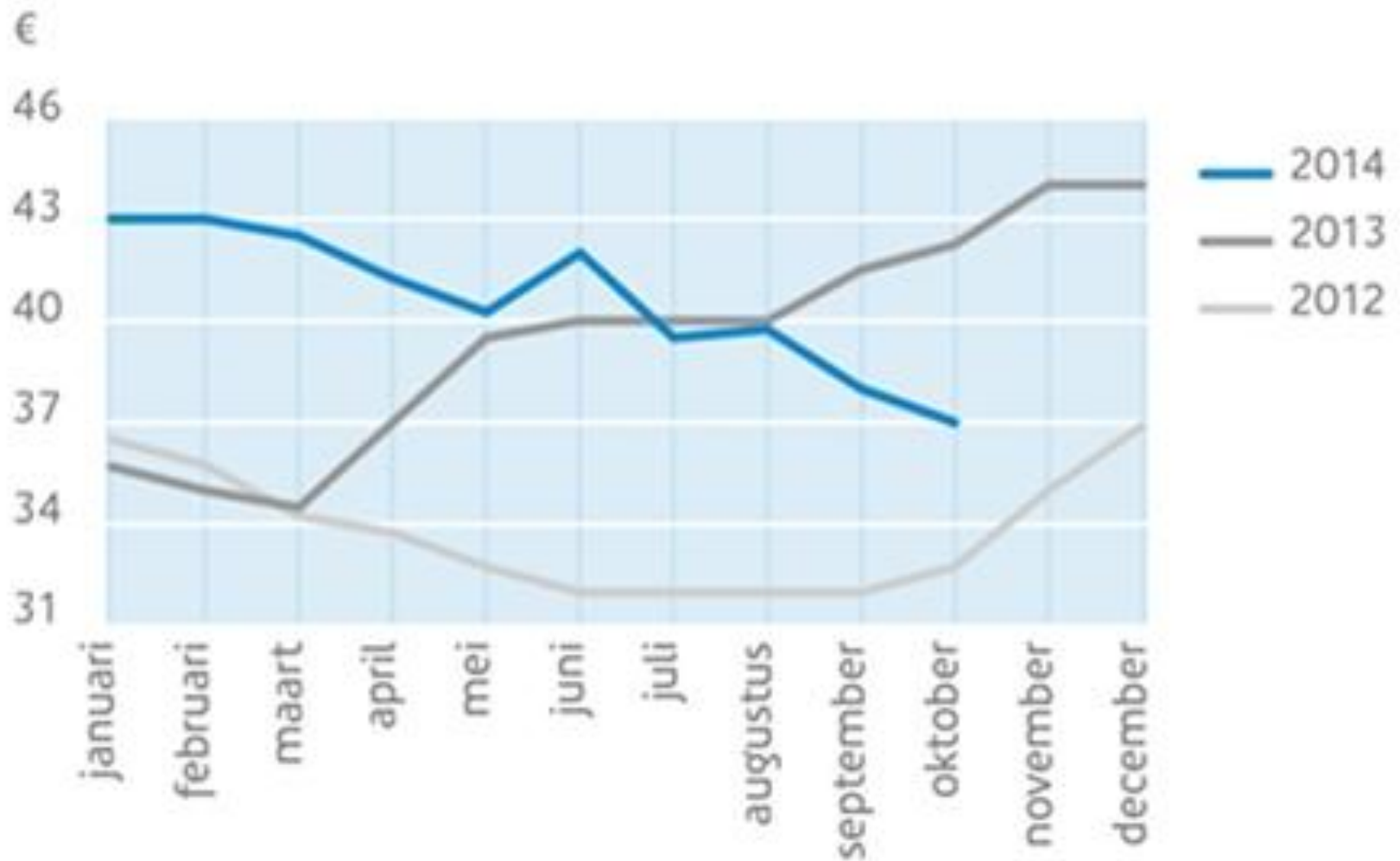
EU MILK PRICES

(Aug 2014 vs Aug 2013)

Source : Member States (Reg. 479/2010)



Dutch farm milk price



Milk quota system

- Intervention price
- Internal support
- Export support
- Milk quota
- *Safety net*
- *Product support -> Rural policy*



- Grow demand greater than production
- Opportunities in the market
- Agri Complex
- Passion / drive to milk cows
- Drive to change



In the Netherlands

- New boundary's
- Limited growing possibility's
 - Economic possibility's
 - Environment theme's
 - Society issues
- *10% - 15% more cow's?*
- *10% better efficiency?*
- *= 20% - 25% more milk in NL*



Structure Dairy sector

- Branche Organization
 - *Dairy NL*
 - Farmers
 - Processors
 - Supply chain
 - Feed / food security
 - Animal health / welfare
 - Sustainability
 - Knowledge / Innovation / Research
 - Market information / Export issues



Facing problem's

- **Golden triangle**
- *Farmer's / Dairy industry*
- *Government*
- *Research / Knowledge centre*
- Education





