



Dairy sector in Poland

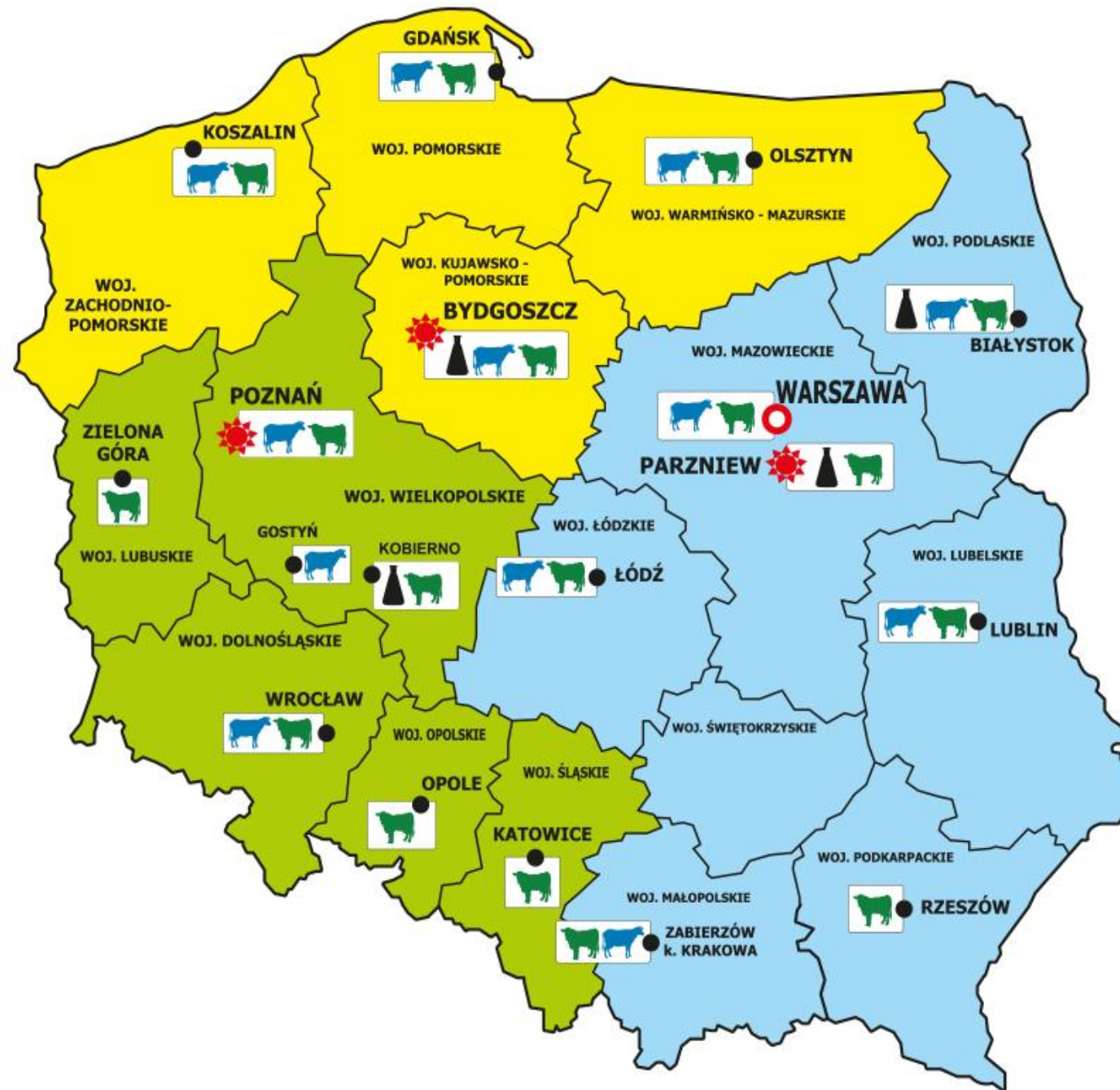
Dorota Śmigielska



Polish Federation of Cattle Breeders and Dairy Farmers



- Is the only legal representative of dairy cattle breeders and milk producers in Poland.
 - It is an independent, voluntary and self-governing organization collecting about 11000 members associated in regional and breeds' unions. There are private farmers, state farms, treasury state corporations, private collectives and tenanted farms.
 - Polish Federation strictly cooperates with many institutions related to cattle breeding in whole country and abroad.
- The Polish Federation of Cattle Breeders and Dairy Farmers is the only organization authorized by Ministry of Agriculture and Rural Development to keep herd books for dairy cattle (since 1st of July 2004), provides milk recording (since 1st of July 2006) and type evaluation (since 1st of July 2007) in Poland.



Key figures

Cow`s milk production

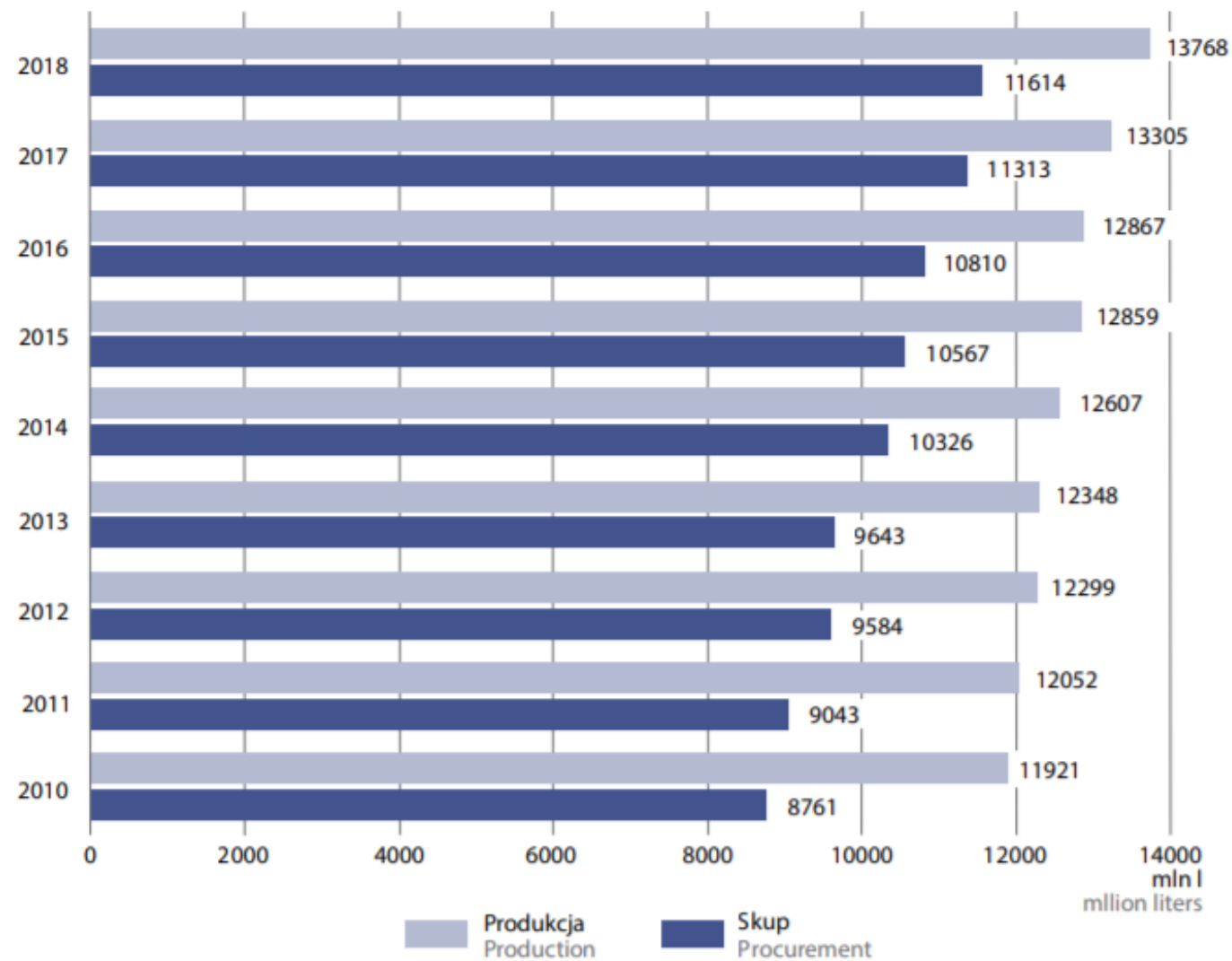
Cow`s milk deliveries (`000 tonnes)

Number of dairy cows (x 1 000 head)

Milk yield per cow (kg)

Number of dairy farms

Cow's milk production



Key figures

Cow`s milk production

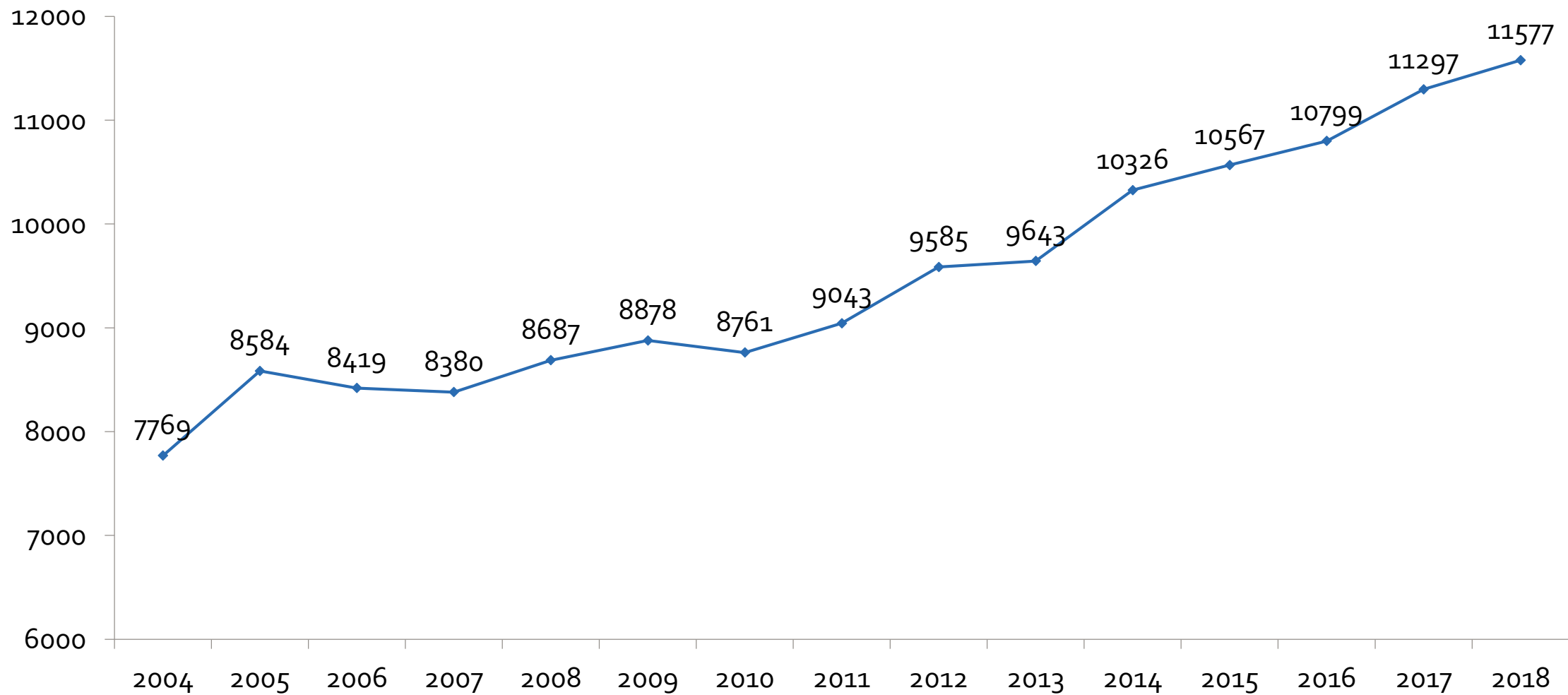
Cow`s milk deliveries

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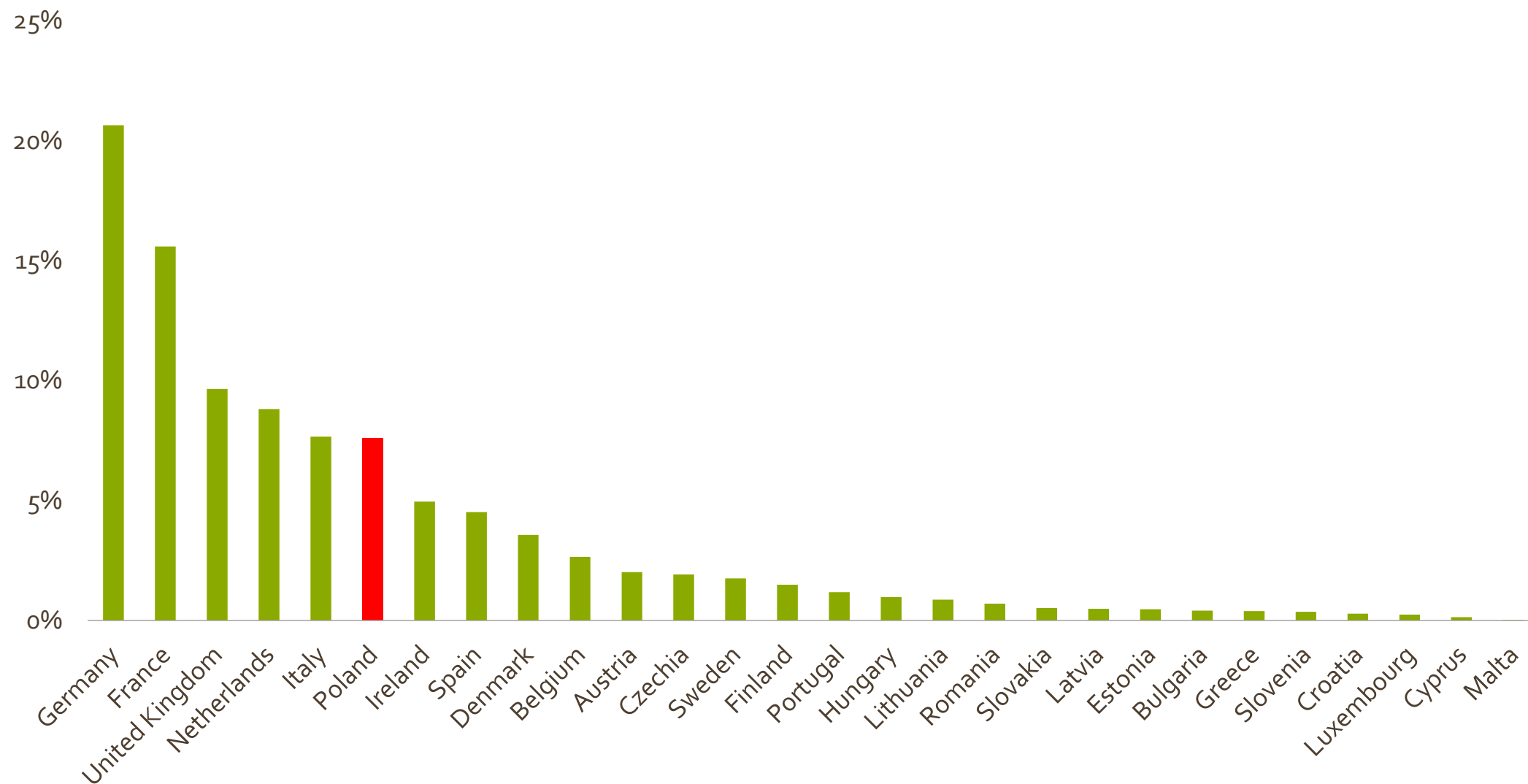
Milk yield per cow (kg)

Number of dairy farms

Cow's milk deliveries mln l



Share in UE-28 milk deliveries 2018



Key figures

Cow`s milk production

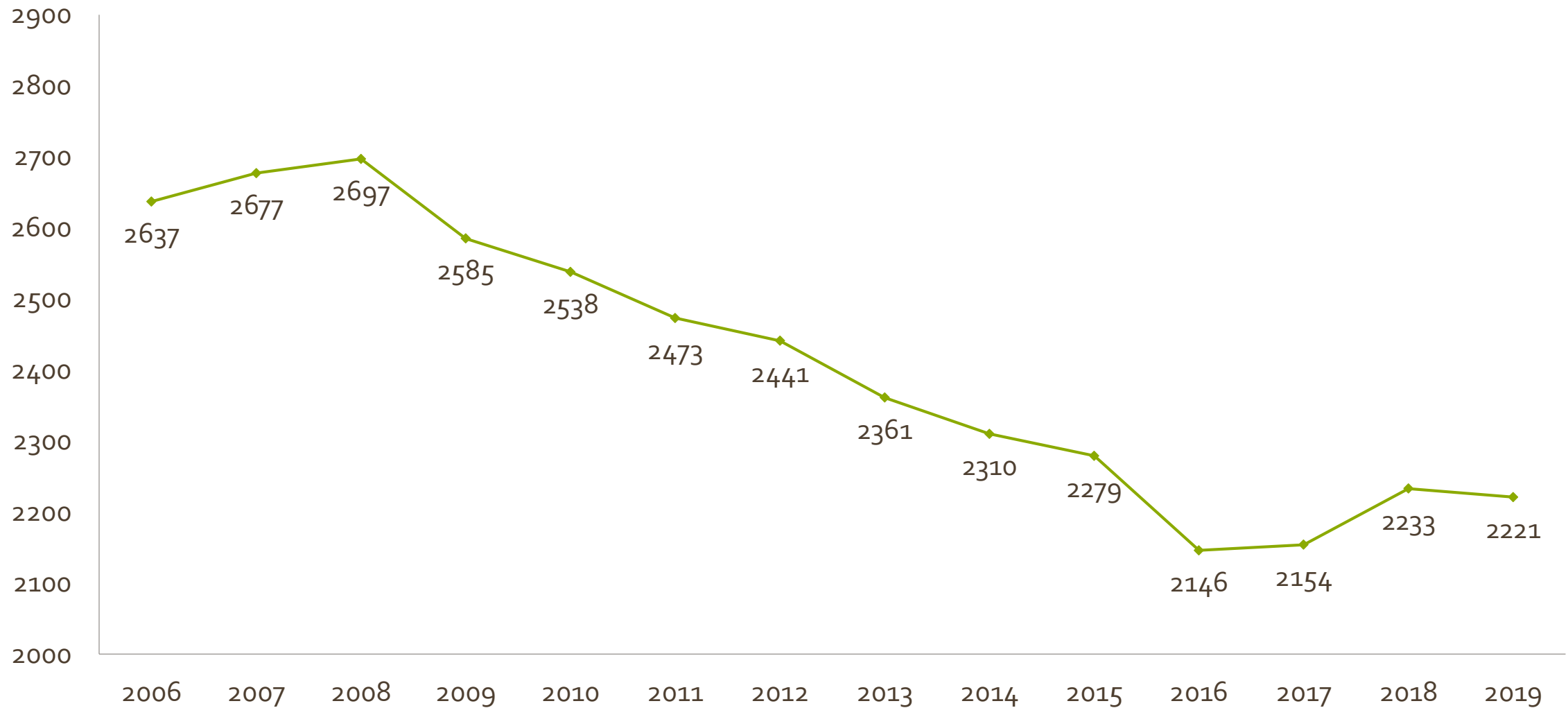
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Number of dairy farms

Number of dairy cows



Key figures

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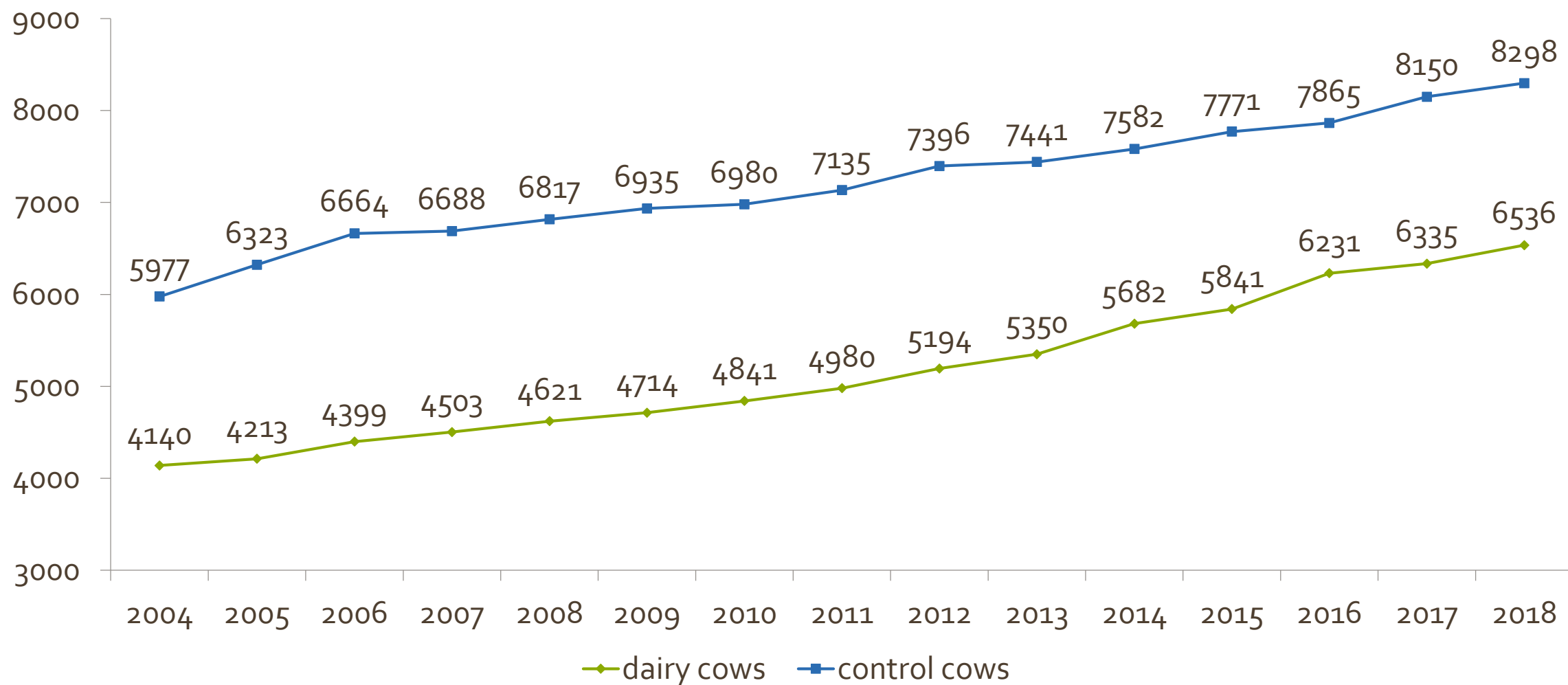
Cow`s milk deliveries

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Milk yield per cow (kg)

Number of dairy farms

Milk yield per cow (kg)



Key figures

Cow`s milk production

Cow`s milk deliveries

Number of dairy cows

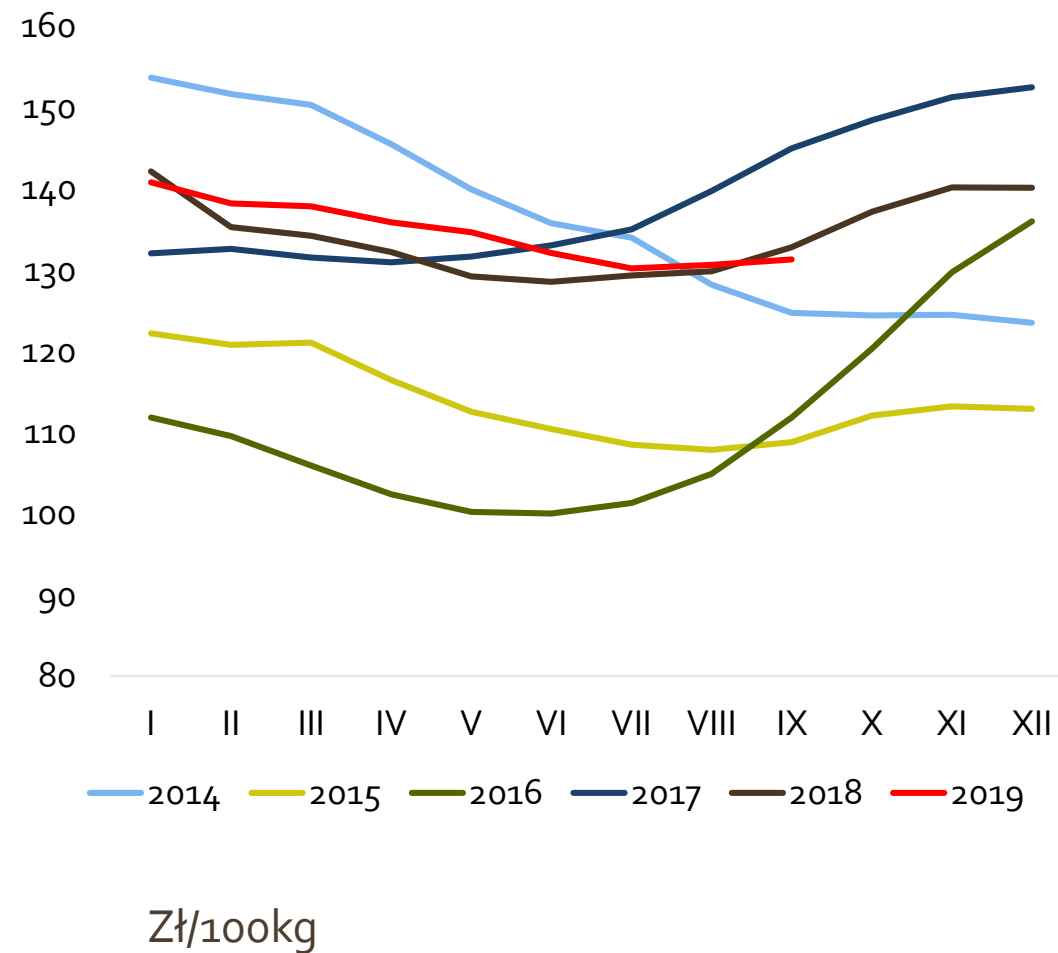
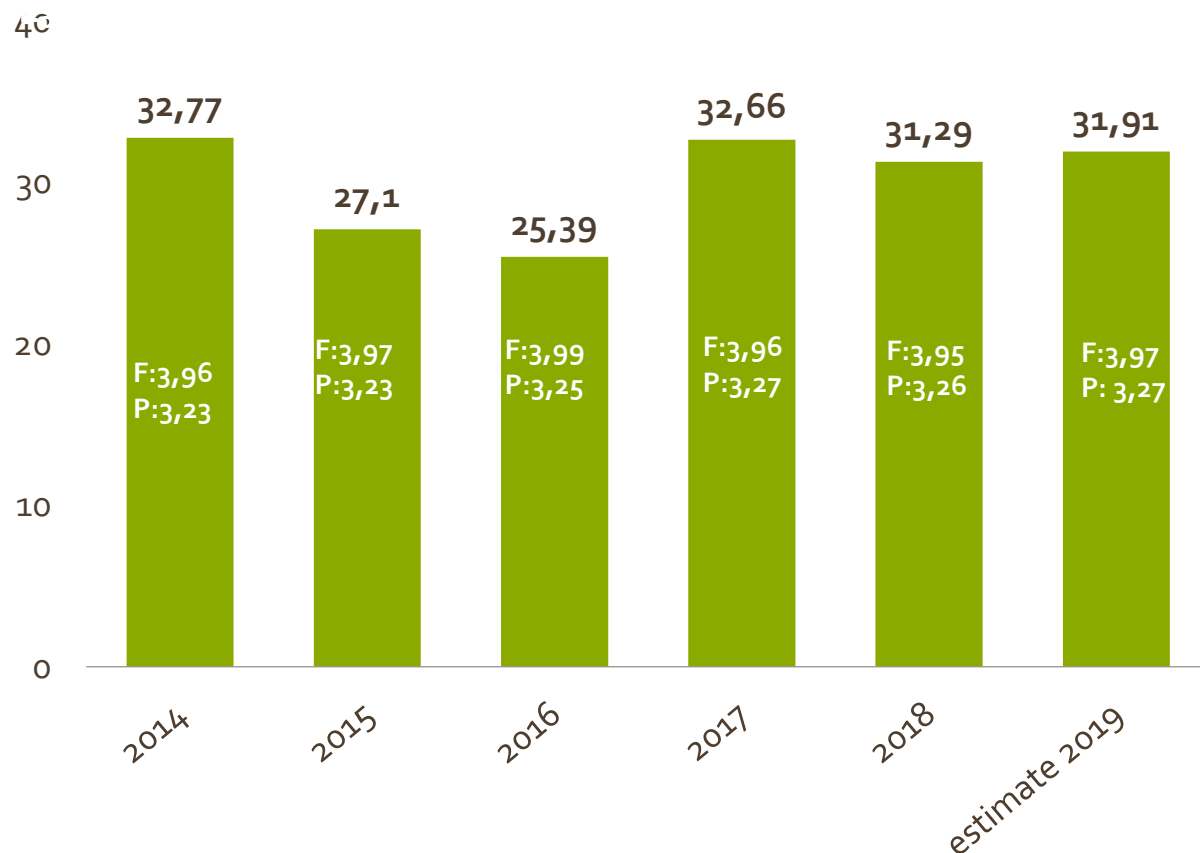
Milk yield per cow (kg)

Number of dairy farms

Number of dairy farms

Herd size	2004			2015		
	cows	farms	cow/farm	cows	farms	cow/farm
from 1 to 2	639,5	487,6	1,3	164,2	126,7	1,3
from 3 to 9	863,8	181	4,8	339,6	66,9	5,1
to 9	1503,2	668,6	2,2	503,8	193,6	2,6
from 10 to 29	931,4	60,4	15,4	919	54,6	16,8
from 30 to 49	132,5	3,6	36,8	438	12,3	35,6
from 50 to 99	64,5	0,96	67	228	3,628	62,8
100 and more	154,2	0,541	285	190,3	0,86	221
from 100 to 199	44,8	0,307	146	77,3	0,603	128
200 and more	109,4	0,234	468	113	0,257	440
IN ALL	2786	734	3,79	2279	264,9	8,6

Cow's milk prices EUR/100kg



Production of milk and milk products (000 ton)

	2014	2015	2016	2017	2018	2019 (estimate)	2019/ 2018
Milk Deliveries	10 581	10 869	11 130	11 647	11 946	12 180	2,0%
Drinking milk	1 604	1 646	1 658	1 733	1 777	1 800	1,3%
Cheese	718	756	791	808	849	880	3,7%
Butter	158	172	184	185	201	210	4,5%
SMP	180	162	163	154	168	170	1,0%
WMP	57	46	44	43	40	45	11,4%

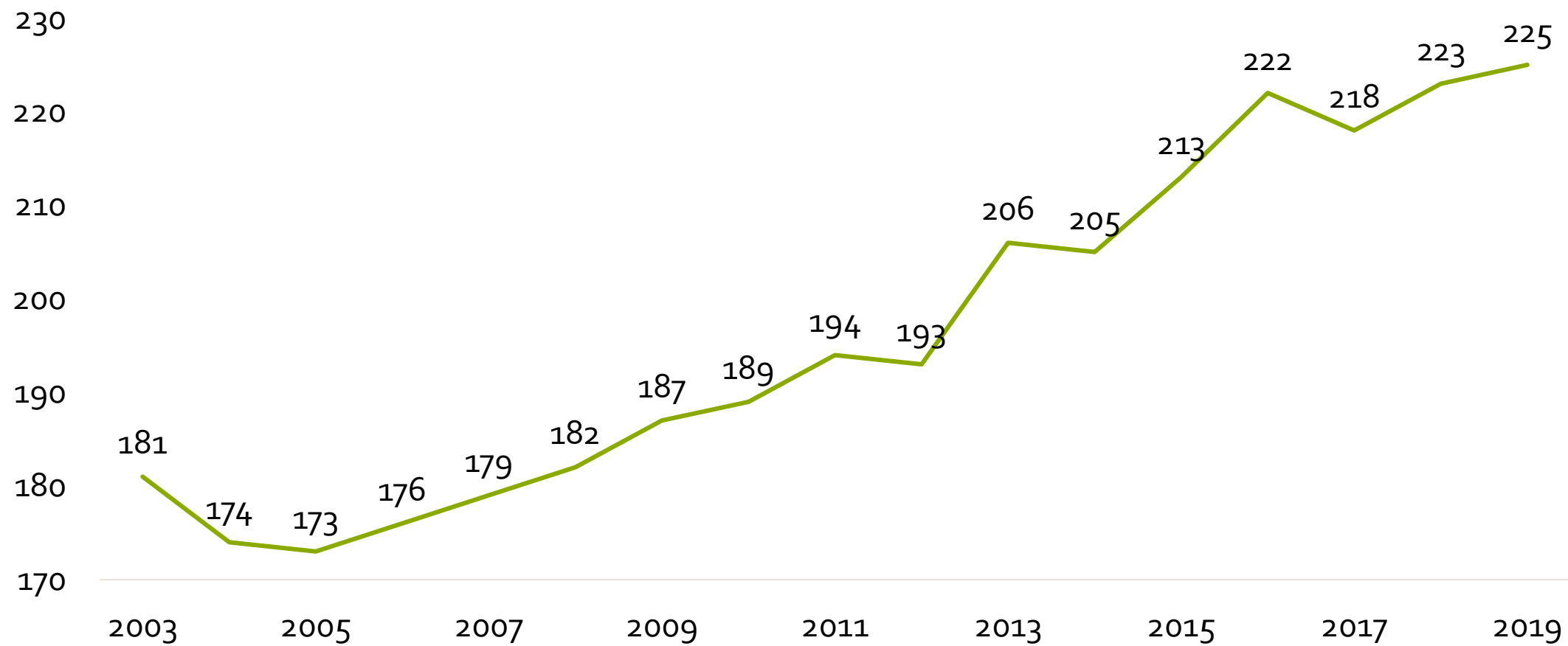
Product	Production in '000 ton						Index
	2014	2015	2016	2017	2018	2019 estimate	2019/ 2018
Processed liquid milk	2956,5	3198,3	3345,1	3519,4	3454,4	3490	1,0%
including: drinking milk	1603,7	1646,1	1658,4	1732,7	1776,8	1800	1,3%
Fermented milk drinks	713,6	717,3	702,4	689,6	719,7	750	4,2%
including yoghurt	437,2	428,6	396,9	373,7	372,1	375	0,8%
Concentrated milk	56,8	59,7	48,6	42,3	44	40	-9,1%
Milk powders	236,1	207,7	206,6	196,4	208,7	215	3,0%
including: whole milk powder	56,6	46	43,9	42,6	40,4	45	11,4%
skimmed milk powder	179,5	161,6	162,7	153,8	168,3	170	1,0%
Cheese	717,5	755,7	791,1	808,2	849	880	3,7%
including: fresh	406	429,9	449,3	459,5	470,1	485	3,2%
ripened	301,3	309,5	329,1	337,8	351,7	365	3,8%
others	10,2	16,3	12,7	10,9	27,2	30	10,3%
Processed cheese	82	77,7	80,3	80,7	79,3	75	-5,4%
Cream	380,9	362,2	349,4	376,3	387,8	400	3,1%
Butter and butteroil	179,6	191,4	204,1	211,5	222,4	225	1,2%
including: butter 80-85% fat	158,1	171,6	183,5	184,6	201	210	4,5%
Whey	1376,8	1500,8	1300,6	1795,3	1632,5	1700	4,1%
including whey powder	262,3	271,5	283	289,3	321,2	335	4,3%

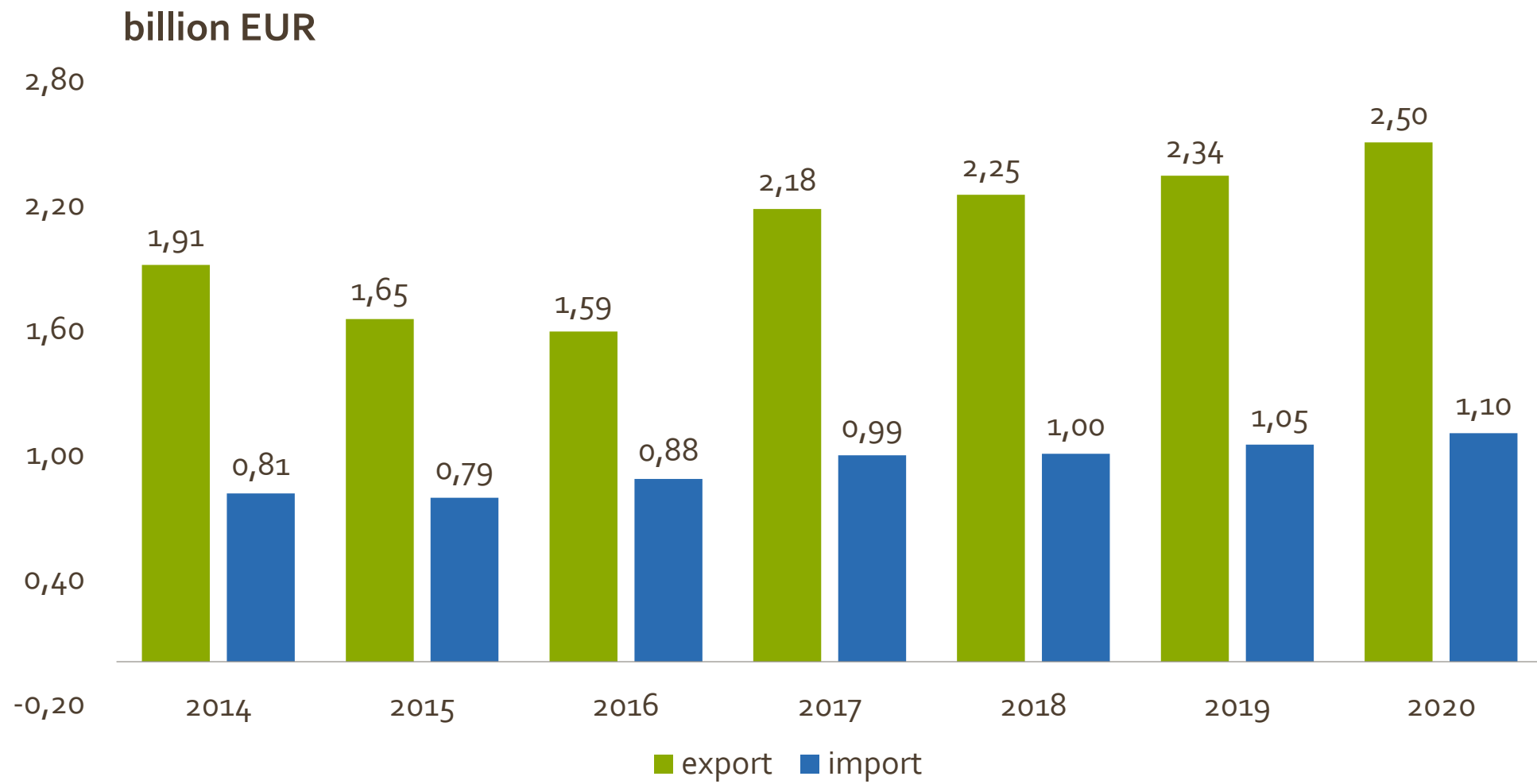
Milk processing and processors

	2014	2015	2016	2017	2018	2019 estimate
Number of processors	181	177	175	168	163	158
Income from sales (billion EUR)	7,15	6,41	6,34	7,90	7,55	7,58
income from sales (billion PLN)	30,02	26,92	27,64	33,67	32,17	32,6



Consumption





Cooperation Of Milk Producers

Milk producers are mainly the owners of dairy processors – 80% of all dairies in Poland are cooperatives. Rest 20% are either Polish capital companies (Polmlek, Milkpol and others smaller) or foreign capital (Danone, Hochland, Zott, Lactalis, Bongrain and others). Delivering milk to private companies are based on individual contracts.

Formulating Groups of milk producers are not so popular in Poland, because of the specific of dairy companies (cooperatives), but there are several Groups operating on the big scale and some Milk Producers Cooperatives. They agglomerate several milk producers from adjacent area, are able to offer bigger milk deliveries and therefore negotiate better prices.

Interbranch Organizations



Polish Chamber of Milk



National Association Of Dairy Cooperatives



Association of Polish Dairy Processors



National Dairy Association



Polish Federation of Cattle Breeders and Dairy Farmers

Changing trends in dairy products:

- Convenience - on-the-go dairy products – easy to drink/eat at school, office, in the public transportation, on the street etc.
- Functional– with high protein content, easy to use at the gym, during training etc.
- Senior functional dairy products – with easy opening, nutrition value added etc.
- One-person household products – for young urban citizens or seniors leaving alone.
- Health attributes and added features
- Clean labels product - without contain any artificial additives or preservatives.
Information regarding the ingredients increase the consumers' trust in the producer and brand.

MILK PROMOTION FOUNDED BY PRODUCERS AND PROCESSORS

Milk Promotion Found (the first related purchasers of milk are required to pay 0.001 zlotys per kilogram of milk purchased by them). Main aims o Milk Promotion Found is to help branch organization in building of the image of Polish dairy sector on the domestic and global market (cofounding fairs and exhibitions), informing and educating of children, teenagers and adults about milk consumption (special promoting action in tv, social media, schools, publishing books, organizing events, presenting of films etc.)

Also processors using their own financial resources undertake promotions action to increase milk consumption among young generation.



Thank you for your attention

Dorota Śmigielska

