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MINISTÈRE
DE L'AGRICULTURE
DE L'AGROALIMENTAIRE
ET DE LA FORÊT

French Dairy sector main characteristics

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Support and development of small producers

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Dnipropetrovsk, *31 March 2016*





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French Dairy sector Main characteristics

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What is a small farm ?





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The dairy industry : a key driver of the French economy

- ⇒ € 27.2 billion (dairy industry revenues)
- ⇒ € 1,040 million annual investments in the dairy industry
- ⇒ 250 000 jobs across France
- ⇒ +€3.6 billion trade surplus in 2013
- ⇒ Dairy product : €8.7 billion production in absolute value : 13% of total agricultural production
- ⇒ France 2d producer in Europe, 8th in the world





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Europe's 2nd largest milk producer

**70,000 dairy farms delivering cow's milk
(427 000 in 1983 ; 149 000 in 1995)**

3.69 million dairy cows (60% Holstein)

1200 processing companies

40% of milk exported (2/3 in EU)

A typical French dairy farm

52 dairy cows

330,000 litres of milk produced annually

92 ha including 32 ha of pasture, 16 ha of corn

**54% run as farm companies (as "GAEC"
collectives or "EARL" limited companies)**





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3 types of dairy farms

Plain areas (34 369 farms / 45%) : bigger farms more intensive

54 dairy cows

351 000 litres of milk, 89 ha

Milk : 52% of national production

Mountains areas (17 444 farms / 16%) : more specialised, more pasture, more PGI

38 dairy cows

221 000 litres of milk, 75 ha

Milk : 16% of national production

Crop and breeding (22 044 farms / 29%) : productivity

51 dairy cows

361 000 litres of milk, 119 ha

Milk : 32% of national production



Milk collection

24,5 billion litres of cow's milk collected

France represents nearly 20% of cow's milk in Europe

A typical cow :

- Weighs **600Kg**
- Produces **6 800 litres of milk annually** (5 700 in 2000)
- Produces up to **30 litres of milk daily**
- Drinks **80 to 100 litres of water** daily during lactation
- Eats **70 kg of forages and cereals** daily





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Milk is collected on average every 48 hours

Milk collection in France

=

54% by cooperatives

+

46% by private companies

**5 French groups rank
in the global dairy
top 25**

N°1
Lactalis



N°4
Danone



N°17
Sodiaal



N°18
Bongrain



N°24
Bel



Source : CNIEL

1.9% of collected milk is organic



Around 60% of dairy products made in France are consumed by the French consumer

1 French person buys on average:



* Fresh dairy products: yoghurts, dairy desserts and fromage blanc

France is:
=> The world's largest consumer of **butter**
=> The world's largest consumer of **cheeses**





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French supports and development of small producers

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Quality and food security

15 dairy laboratories



**Milk price based on
the quality**

108 million analysis

**1 dairy farm is
subject to 250
random milk
analysis per year.**





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Cooperatives

45 000 producers members (54% of the collected milk)

Turn over : 10,5 Bn€

Market share : 66% of milk ; 53% of powders, 51% of butter, 43% of cheeses

Accompagny the production everywhere in France and specially in remote areas.

Better management of volume/price in the context of the end of quotas in 2015.





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Technical advice and innovation

- **Technical advices** : Chamber of agriculture, or private groups, or producer organisations like cooperatives
- **Research and development institute** : tools and references for the advisors and diagnostics
- **Training center networks** : highschoools, centers, vocational programs
- **Public supports** : young farmers policy, European Agricultural Fund for Rural Development, State aid



Protected designation of origin & Protected geographic indications



Collective and voluntary démarche

Specificities of the Product are linked to the location of the production (GIP : at least for production or process) in line with strict specifications. The linked to the origin is based on quality, reputation or properties. 50 PDO. 10% / milk, 21% / farms.

Importance of the role of the organisation

Name open to all producers present in the territory respecting the specification.

Better protection, not limited in time & guaranteed by national authorities

Better value : milk 20% higher ; finished product 2,23 times higher

Turn-over : 1,89 bn € for dairy products





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Thank you for your attention !

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