



VISION FOR THE GLOBAL DAIRY SECTOR

A PERSONAL VIEW

**GENERAL ASSEMBLY OF FEPALE
HAVANA, CUBA, 29 NOVEMBER 2017
NICO VAN BELZEN, PHD
DIRECTOR GENERAL
INTERNATIONAL DAIRY FEDERATION (IDF)**



VISIÓN PARA EL SECTOR LÁCTEO GLOBAL: UNA VISIÓN PERSONAL

**ASAMBLEA GENERAL DE FEPALE
HABANA, CUBA, 29 DE NOVIEMBRE DE 2017
NICO VAN BELZEN, PHD
DIRECTOR GENERAL
FEDERACIÓN INTERNACIONAL DE LECHERÍA (IDF)**

DIPOSITIVAS TRADUCIDAS POR LIC. LEYANIS AGUIAR DÍAZ, MSc



Development of the dairy sector

- Key drivers
- Current state
- Future



Desarrollo del sector lácteo

- Factores clave
- Estado actual
- Futuro

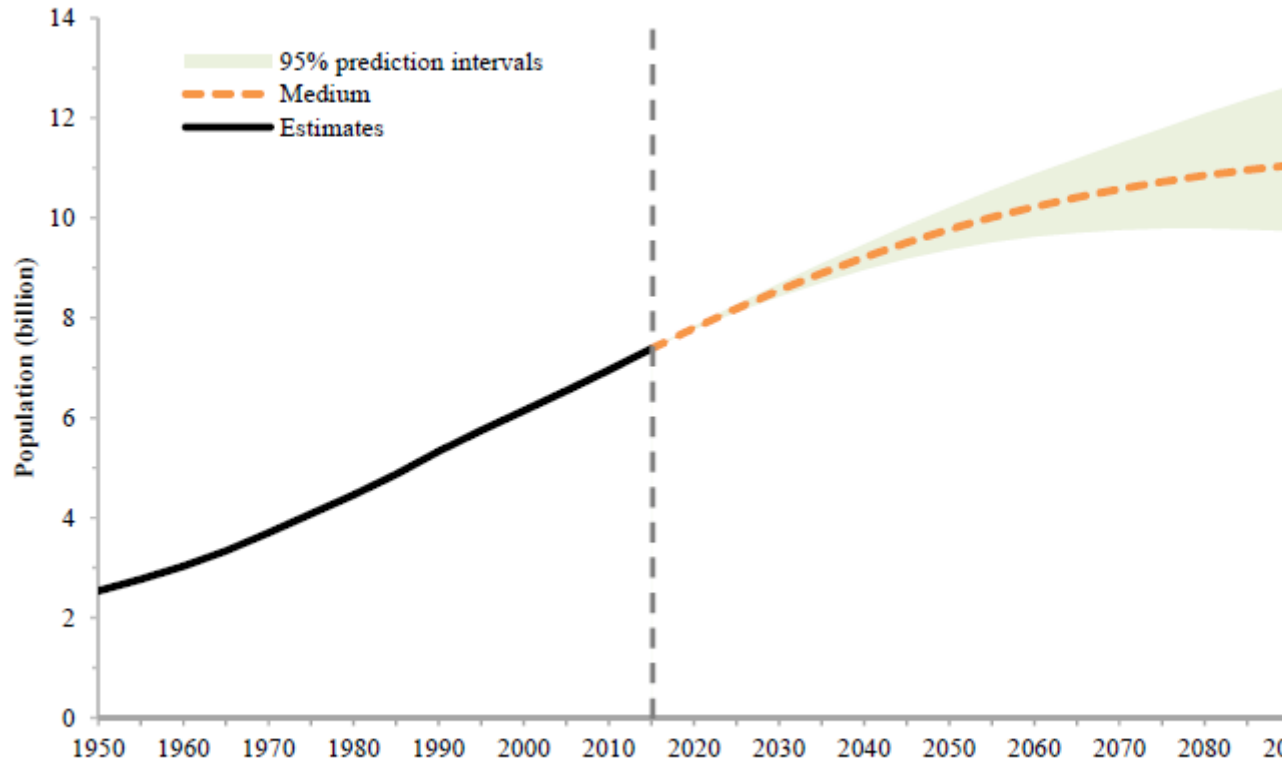


Key drivers of the dairy sector

Principales impulsores del sector lechero

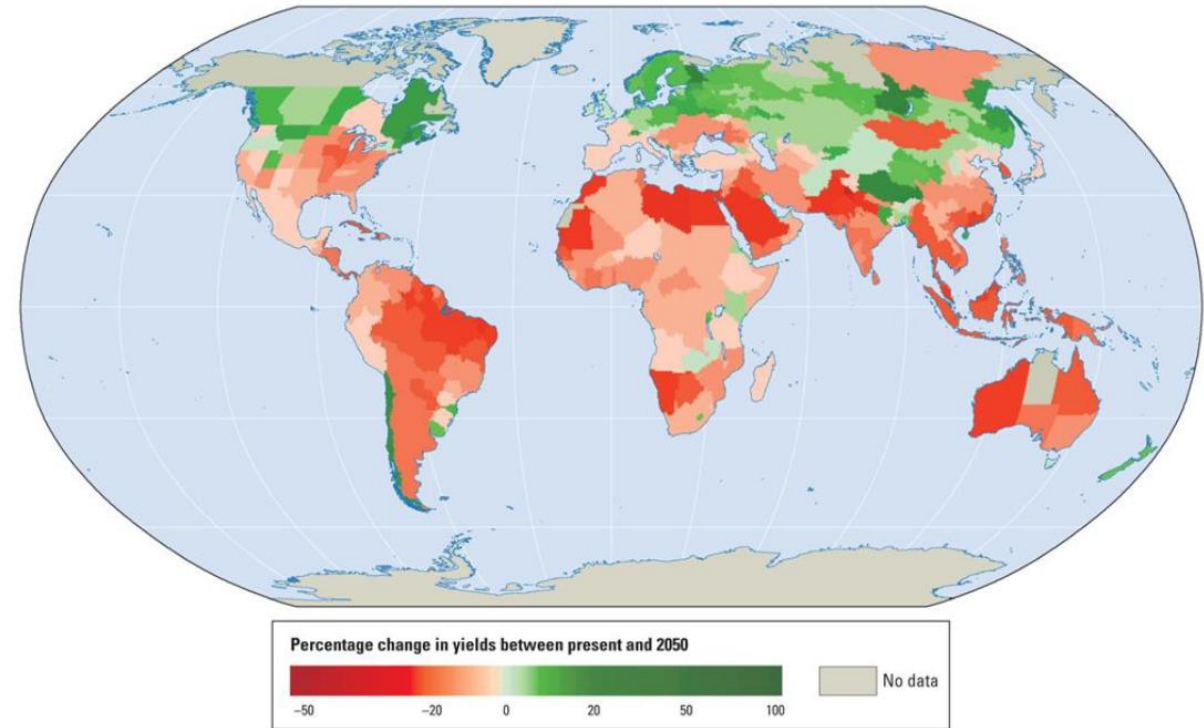
KEY CHALLENGES: POPULATION GROWTH AND CLIMATE CHANGE

Figure 2. Population of the world: estimates, 1950-2015, and medium-variant projection with 95 per cent prediction intervals, 2015-2100



Source: United Nations, Department of Economic and Social Affairs, Population Division (2017). *World Population Prospects: The 2017 Revision*. New York: United Nations.

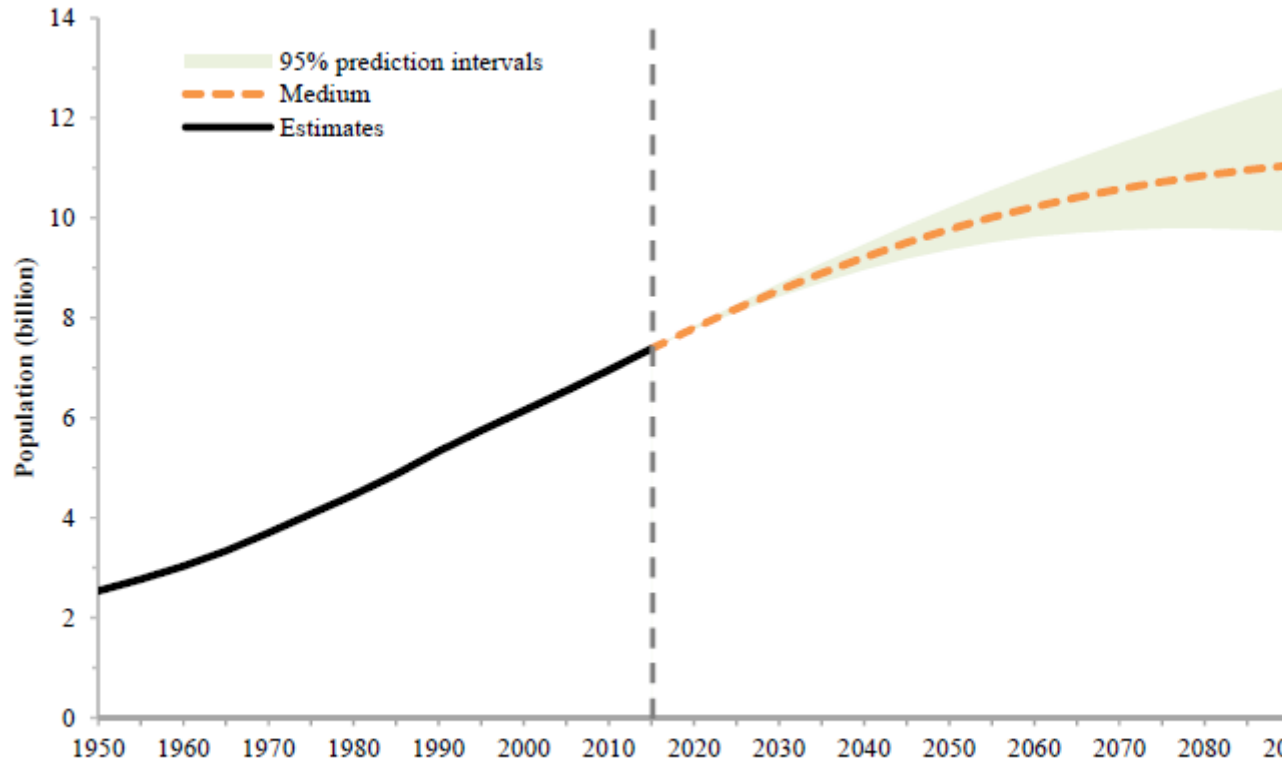
Projected percentage in agricultural yields by 2050 given current agricultural practices and crop varieties



Source: World Bank (World Development Report 2010).

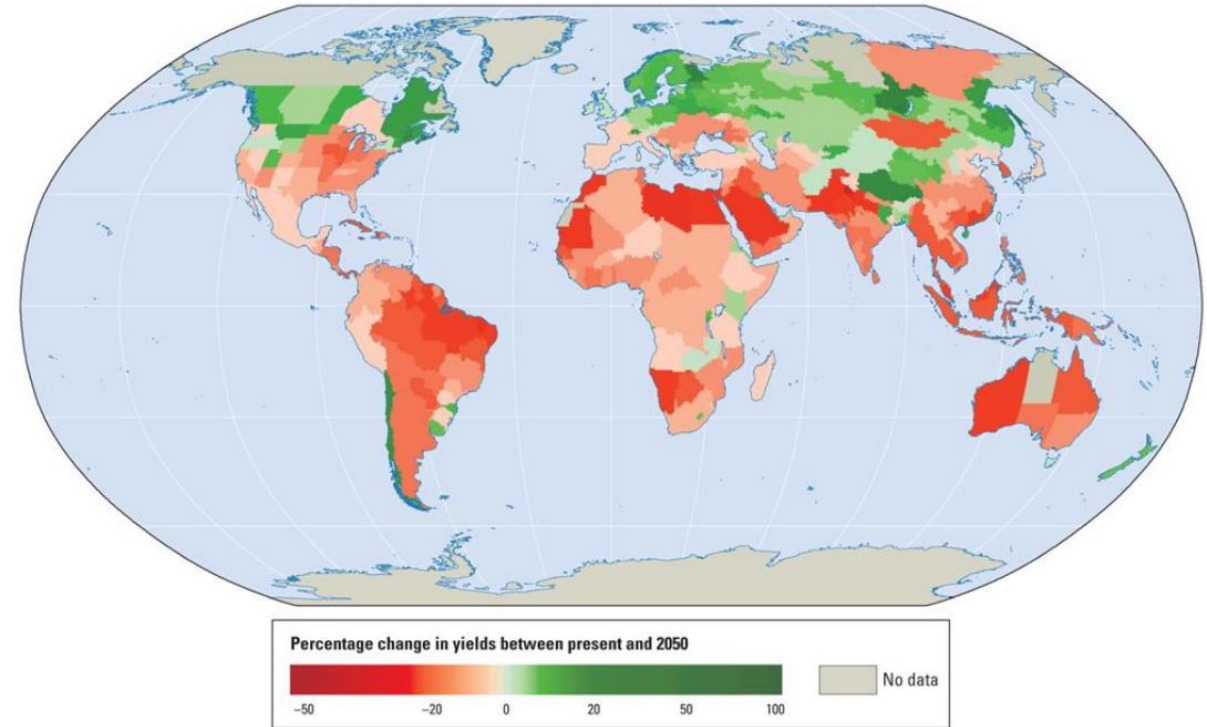
LOS RETOS: CRECIMIENTO DE LA POBLACIÓN, CAMBIO CLIMÁTICO

Figura. Población del mundo: estimaciones 1950-2015 y proyección de variante media con intervalos de predicción del 95%, 2015-2100



Source: United Nations, Department of Economic and Social Affairs, Population Division (2017). *World Population Prospects: The 2017 Revision*. New York: United Nations.

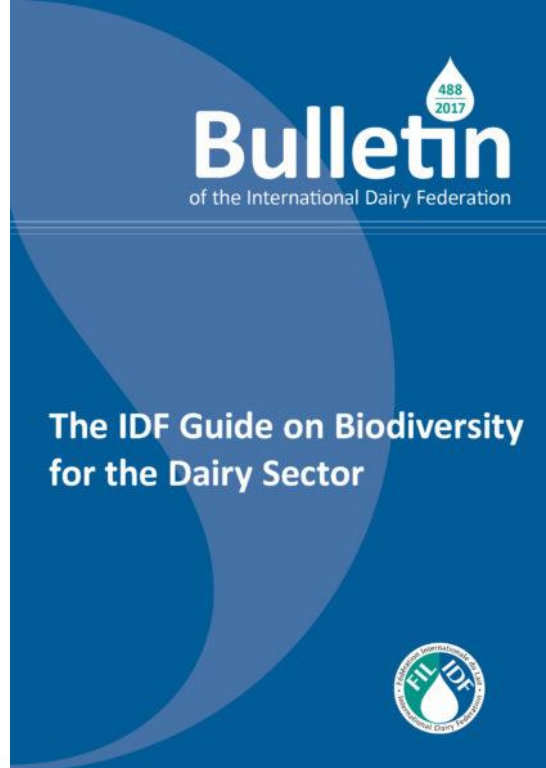
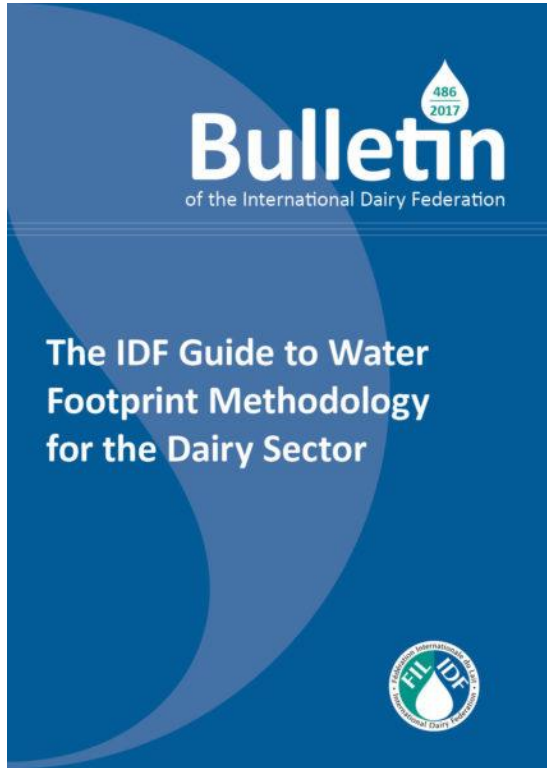
Porcentaje proyectado de los rendimientos agrícolas para el año 2050, dadas las prácticas agrícolas actuales y las variedades de cultivos



Source: World Bank (World Development Report 2010).

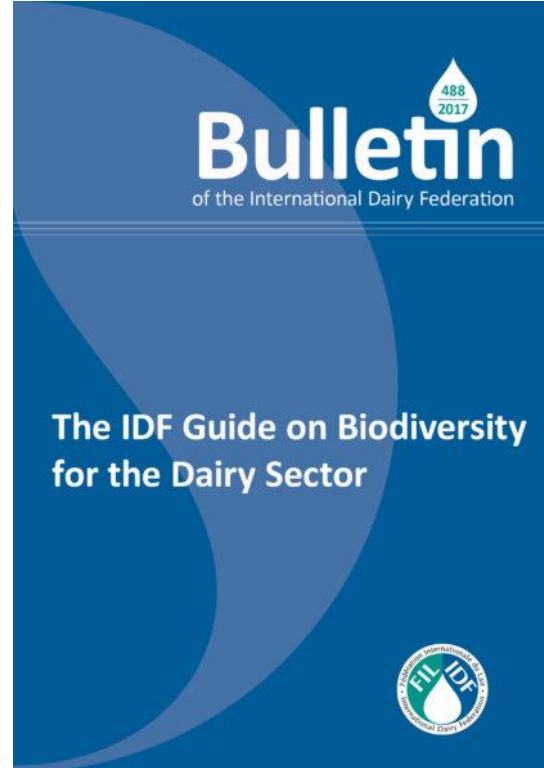
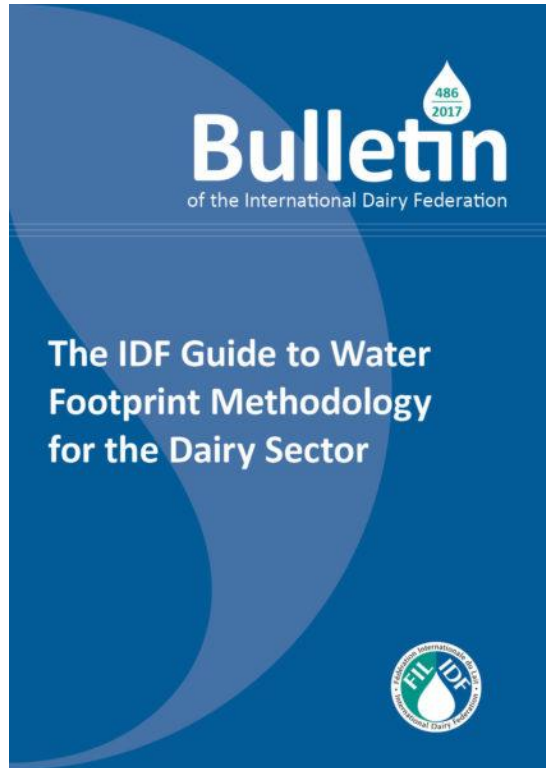


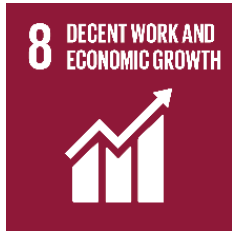
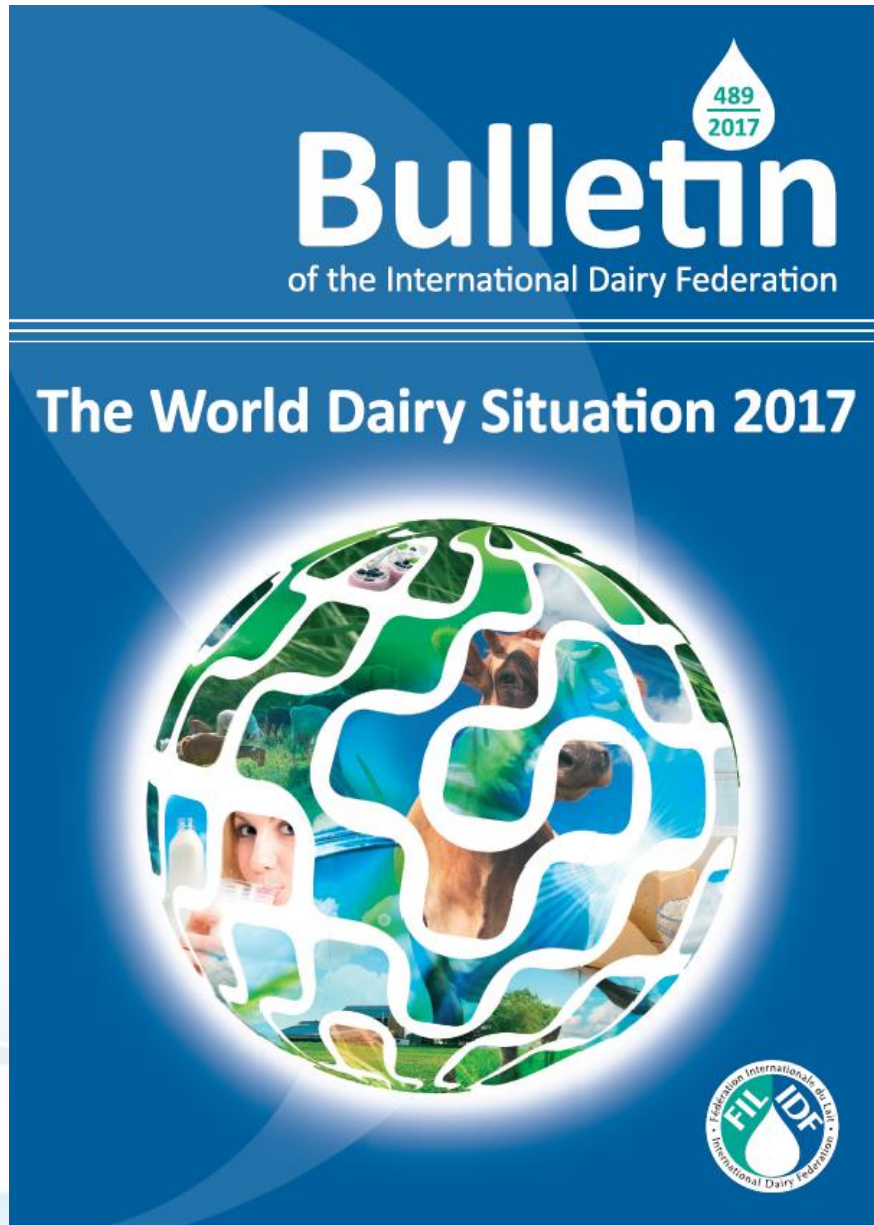
Environmental sustainability of the dairy sector





Sostenibilidad ambiental del sector lechero








489
2017

Bulletin


of the International Dairy Federation

The World Dairy Situation 2017






IDF Factsheet 004/2017-04

Scientific excellence • Industry applicability • Strategic networking • Global influence



Executive Summary of IDF Country Reports – April 2017



Members of the IDF Standing Committee on Dairy Policies and Economics (SC DPE) from 11 countries¹ submitted country reports covering the six months leading up to April 2017. This fact sheet highlights the main findings from the review of the country reports as prepared by Peter Dawson (UK) and presented to the Committee at the SC DPE meeting held in Tel Aviv 26th April 2017.

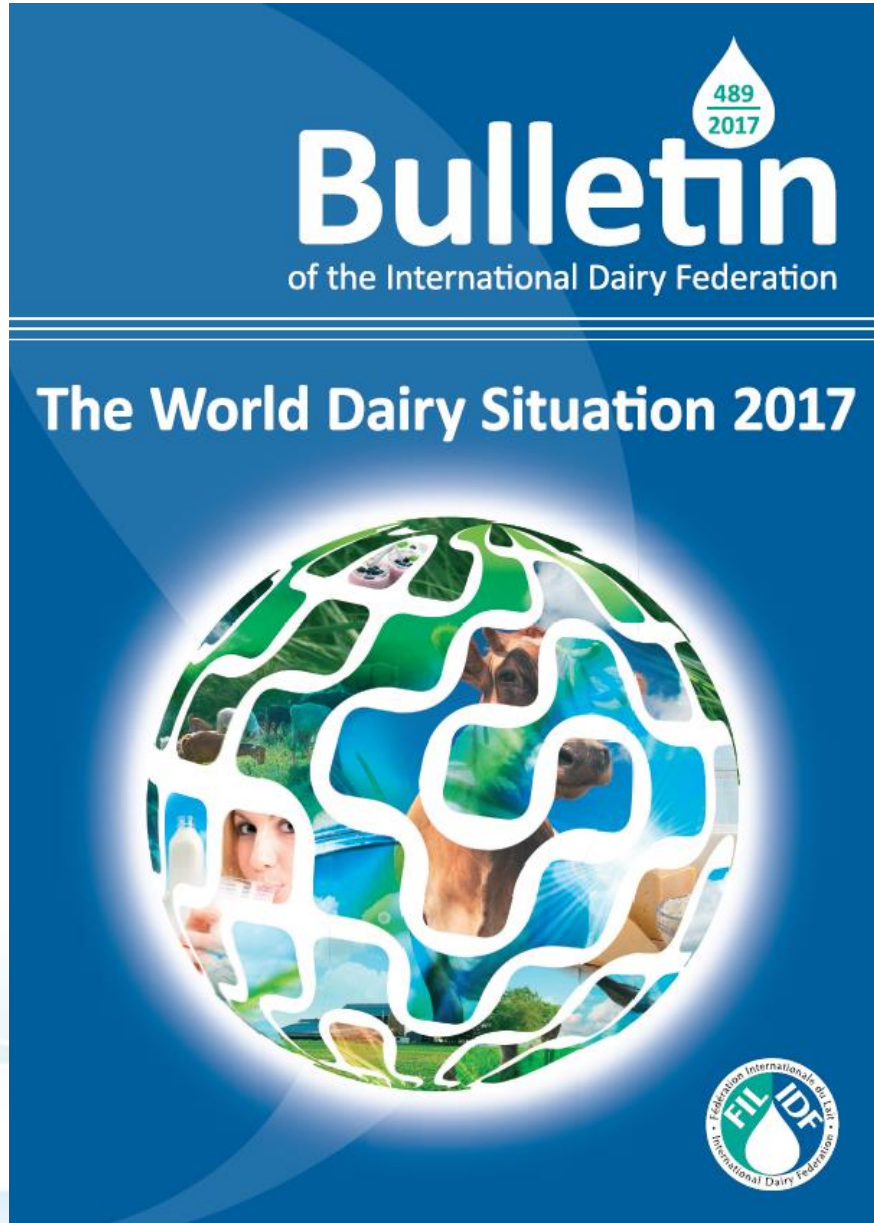
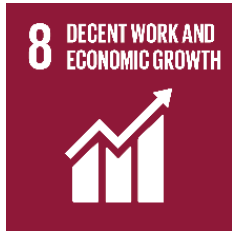
Milk Production

Production trends for the latest period (October 2016 to April 2017) reported by the majority of EU countries were negative or weak. The largest declines were recorded for France at -5.6% and Ireland at -4.6%. The exception was Italy with +3.2%. Milk production in the Netherlands for 2017 was expected to contract due to the constraints of environmental legislation on phosphates.

ahead strongly in the second half of 2016 with some stabilization in the first period of 2017. However the expectation was that they will remain firm for the remainder of the year due to strong demand growth.

However protein prices remained weak with significant stocks over-hanging the market. The underlying trend would be clarified once the EU had passed its production peak in May. On the world market the GDT auction recorded similar overall trends.





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The importance of food safety

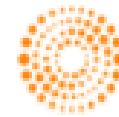
World Health Organization: in 2010

- 600 million foodborne diseases
 - 1 of 11 people
- 420,000 deaths
 - 1 of 16,000 people
- 33 million healthy life years lost (DALYs)

3 GOOD HEALTH AND WELL-BEING



#BUSINESS NEWS AUGUST 23, 2017 / 3:41 PM / 2 DAYS AGO



REUTERS

Contaminated eggs cost Dutch chicken farmers 33 million euros

WHO ESTIMATES OF
THE GLOBAL BURDEN
OF FOODBORNE DISEASES



La importancia de la seguridad alimentaria

Organización Mundial de la Salud (WHO):
en 2010

- 600 millones de enfermedades transmitidas por los alimentos
1 de cada 11 personas
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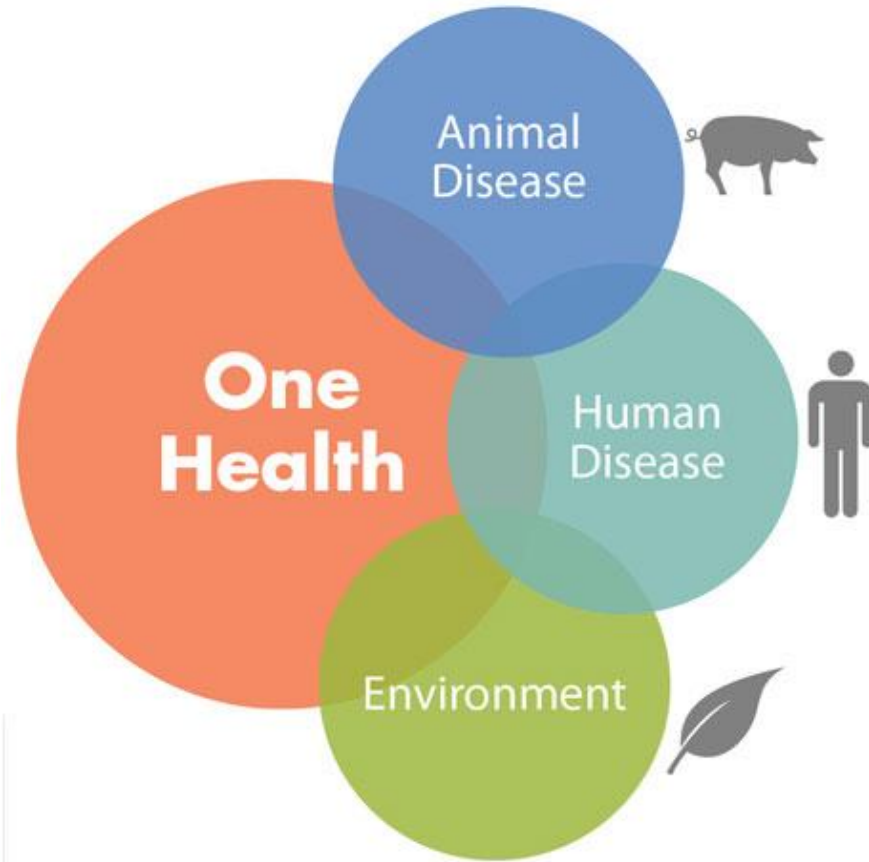


quien estima la carga global de enfermedades transmitidas por los alimentos?



Food safety – the One Health concept

3 GOOD HEALTH AND WELL-BEING



IDF Animal Health Report

Issue N° 11 - September 2017

484
2016
Bulletin
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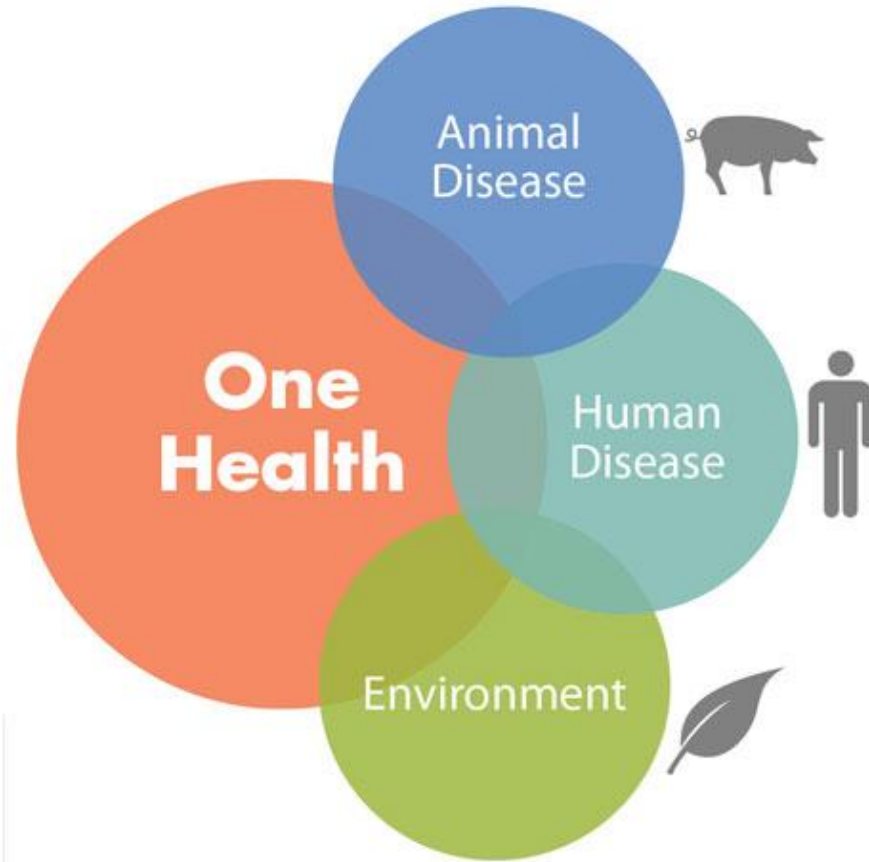
Proceedings of the
5th Paratuberculosis Forum
Nantes, France, 19 June 2016





Seguridad alimentaria: el concepto de “Una Salud”

3 GOOD HEALTH AND WELL-BEING



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Antimicrobial resistance

IDF Factsheet 003/2017-05

Scientific excellence • Industry applicability • Strategic networking • Global influence



Guidance on Antimicrobial Resistance from the Dairy Sector

3 GOOD HEALTH AND WELL-BEING



Responsible use of antimicrobial agents in the global dairy industry

Nico van Belzen, PhD

Director General, International Dairy Federation
IACG, 17th October 2017, OIE Headquarters, Paris
Slideshow by María Sánchez Mainar, PhD



GLOBAL DAIRY POSITION ON AMR

IDF Factsheet 003/2017-05

Scientific excellence • Industry applicability • Strategic networking • Global influence



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This reference document outlines dairy sector guidance on prudent use of AA and defines the global dairy position on AMR





Resistencia antimicrobiana

IDF Factsheet 003/2017-05

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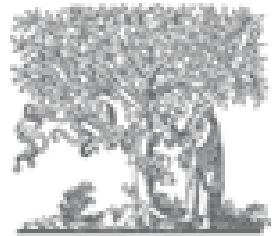
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ELSEVIER

International Dairy Journal

Volume 68, May 2017, Pages 46–51



Short communication

Non-protein nitrogen determination: A screening tool for nitrogenous compound adulteration of milk powder

Jonathan W. DeVries^{a, 1}, George W. Greene^b, Anitra Payne^c, Steven Zbylut^a, Peter F. Scholl^d, Paul Wehling^a, Jaap M. Evers^e, Jeffrey C. Moore^f  

Seguridad química, e.g. prevención de la adulteración

3 GOOD HEALTH AND WELL-BEING



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Trade restrictions

#WORLD NEWS

AUGUST 7, 2017 / 5:18 PM / 3 MONTHS AGO

Sanctions have a silver lining for Russian cheese producers

Reuters Staff

2 MIN READ



ISTRA, Russia (Reuters) - Russia's ban on imported foodstuffs from the West may have caused a headache for European farmers, but it has played right into the hands of Russian cheese producers gladly filling the lucrative niche.

Restricciones comerciales

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“Imitation is the sincerest form of flattery that mediocrity can pay to greatness.”

– Oscar Wilde



Press and Information

Court of Justice of the European Union

PRESS RELEASE No 63/17

Luxembourg, 14 June 2017

Judgment in Case C-422/16

Verband Sozialer Wettbewerb eV v TofuTown.com GmbH

Purely plant-based products cannot, in principle, be marketed with designations such as ‘milk’, ‘cream’, ‘butter’, ‘cheese’ or ‘yoghurt’, which are reserved by EU law for animal products



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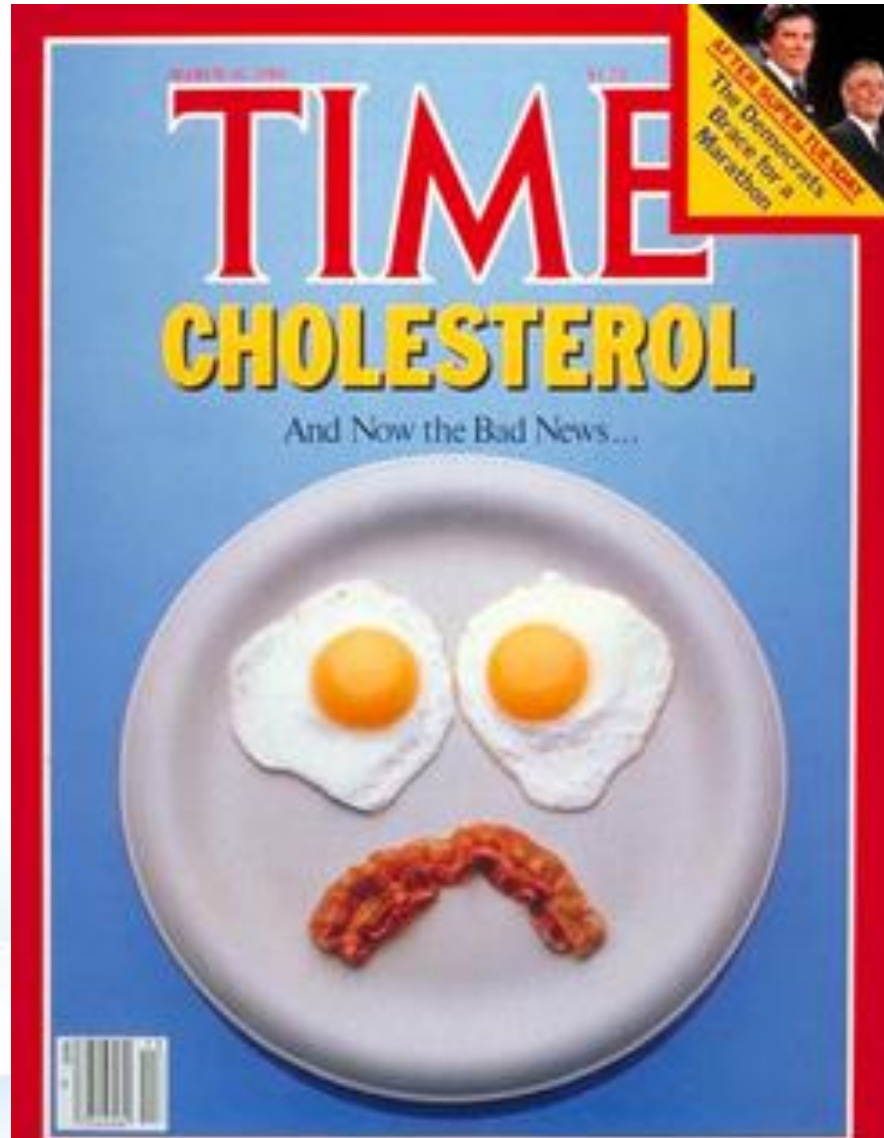
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MEDIA AND CONSUMER ATTITUDE

1984

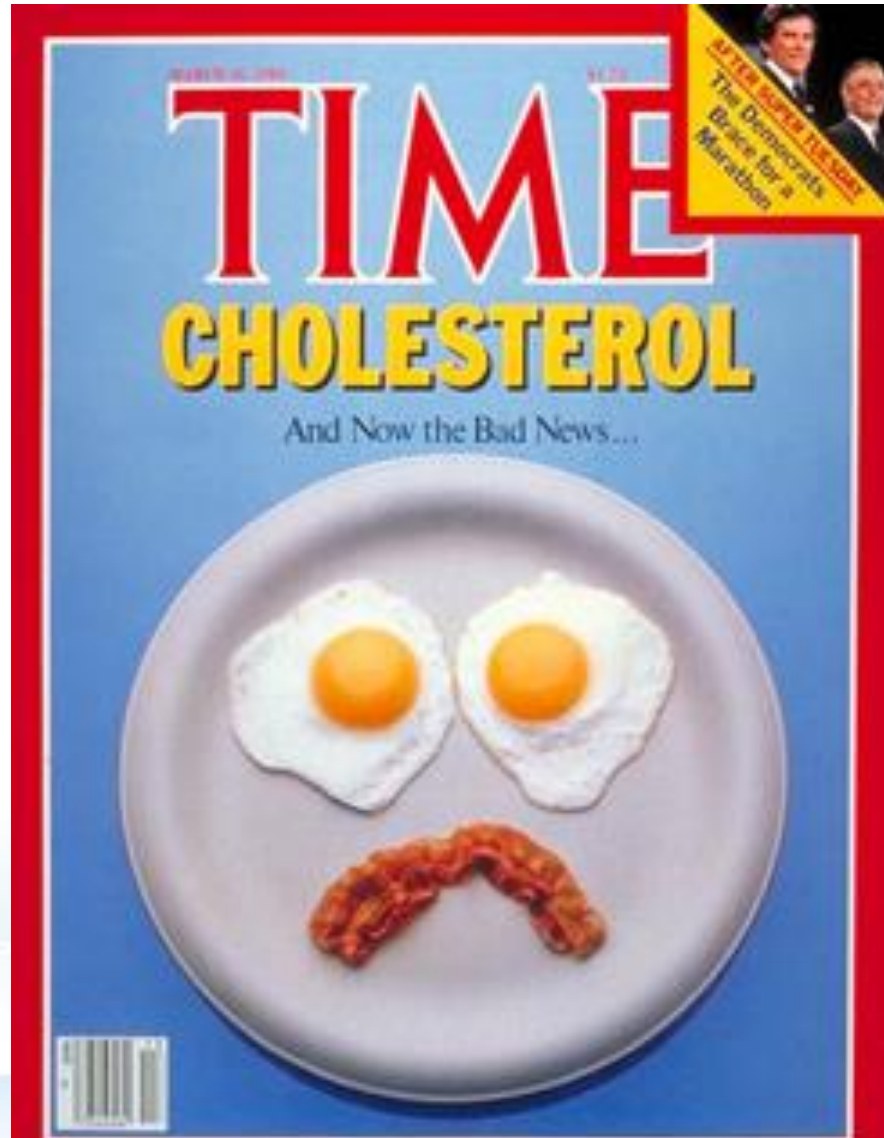


2014



LOS MEDIOS Y LA ACTITUD DEL CONSUMIDOR

1984

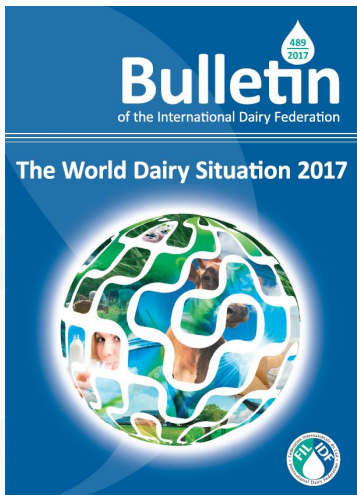
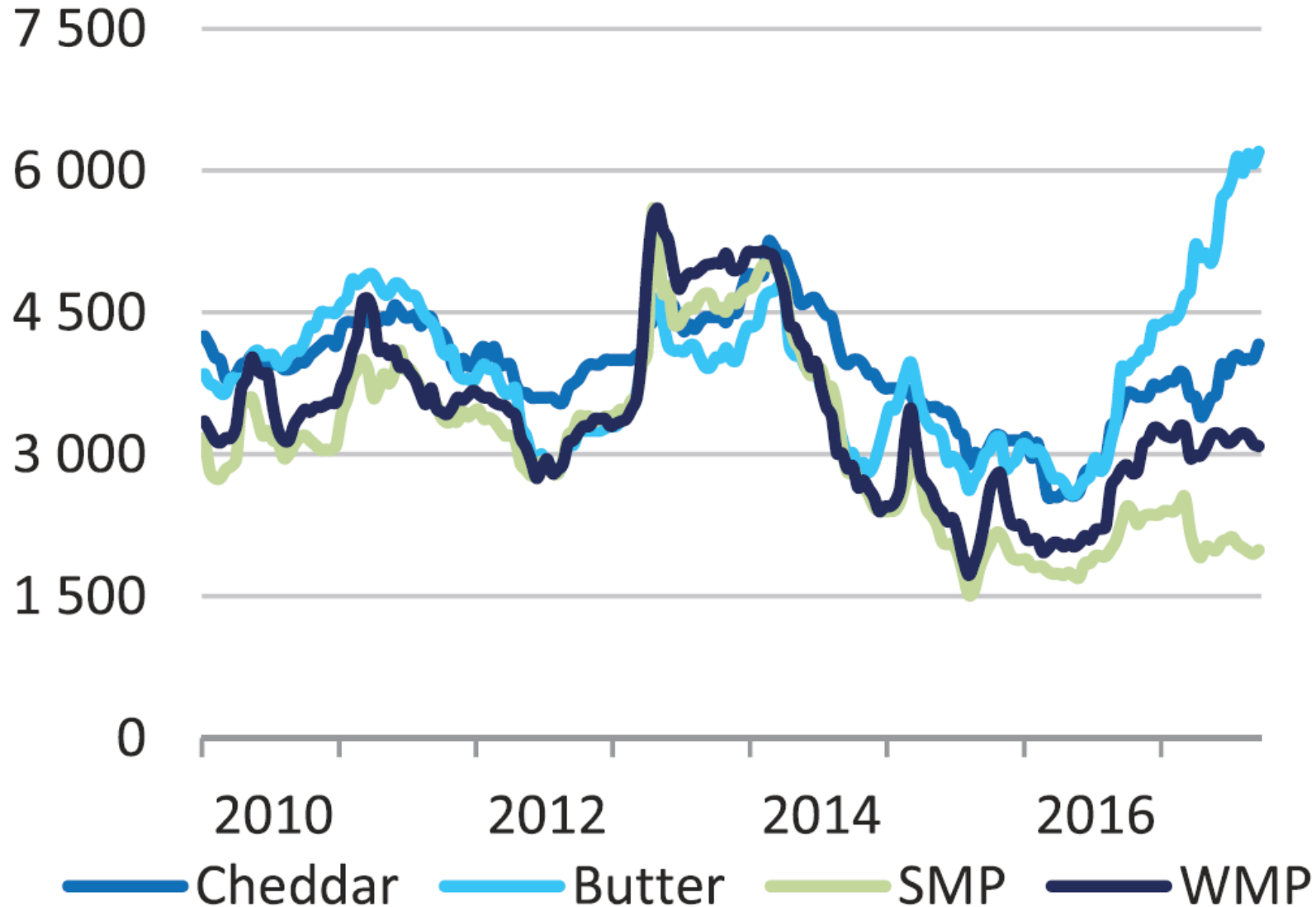


2014



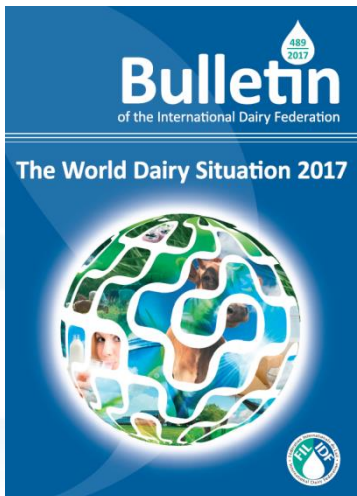
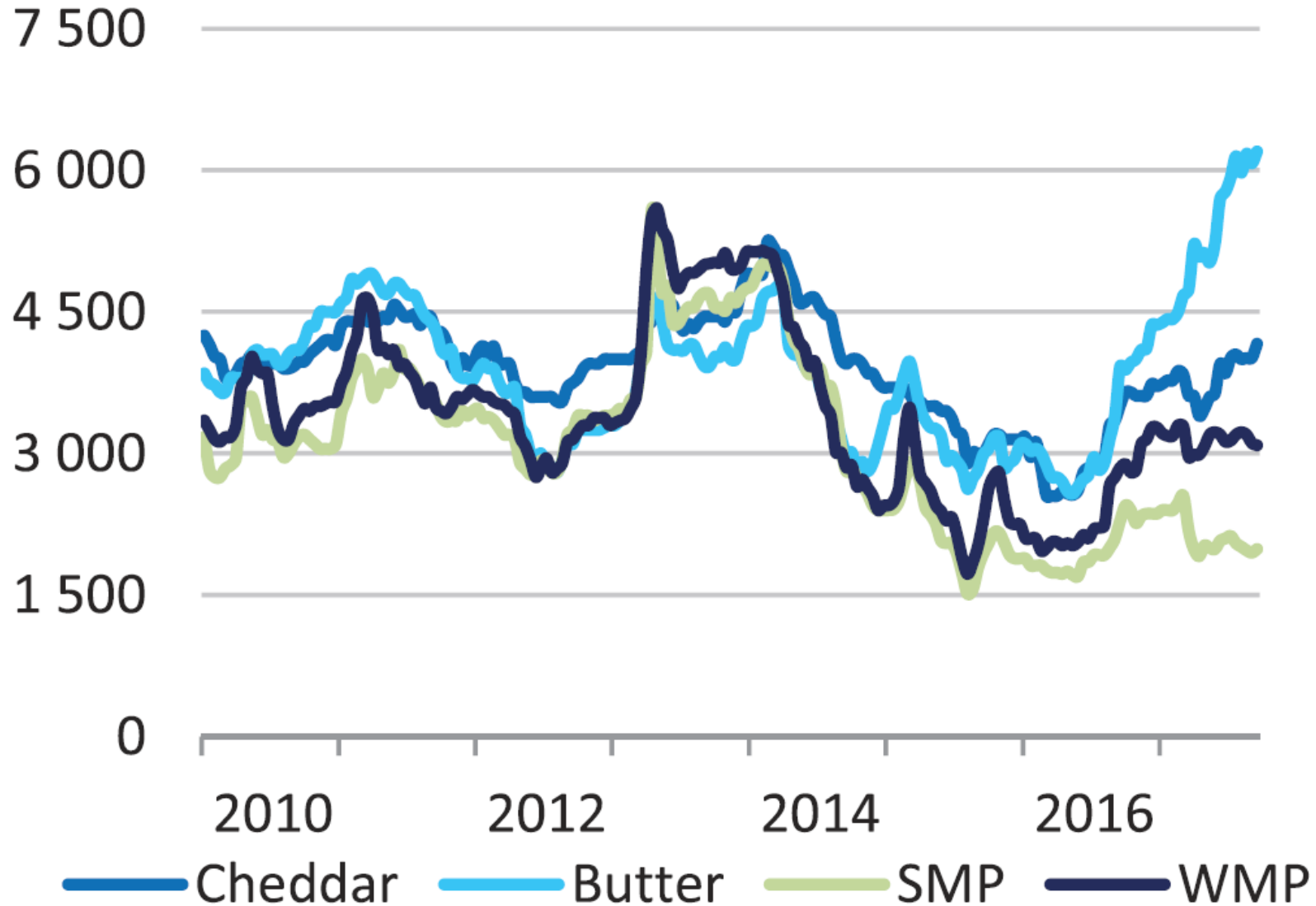
World: dairy product prices

USD per tonne

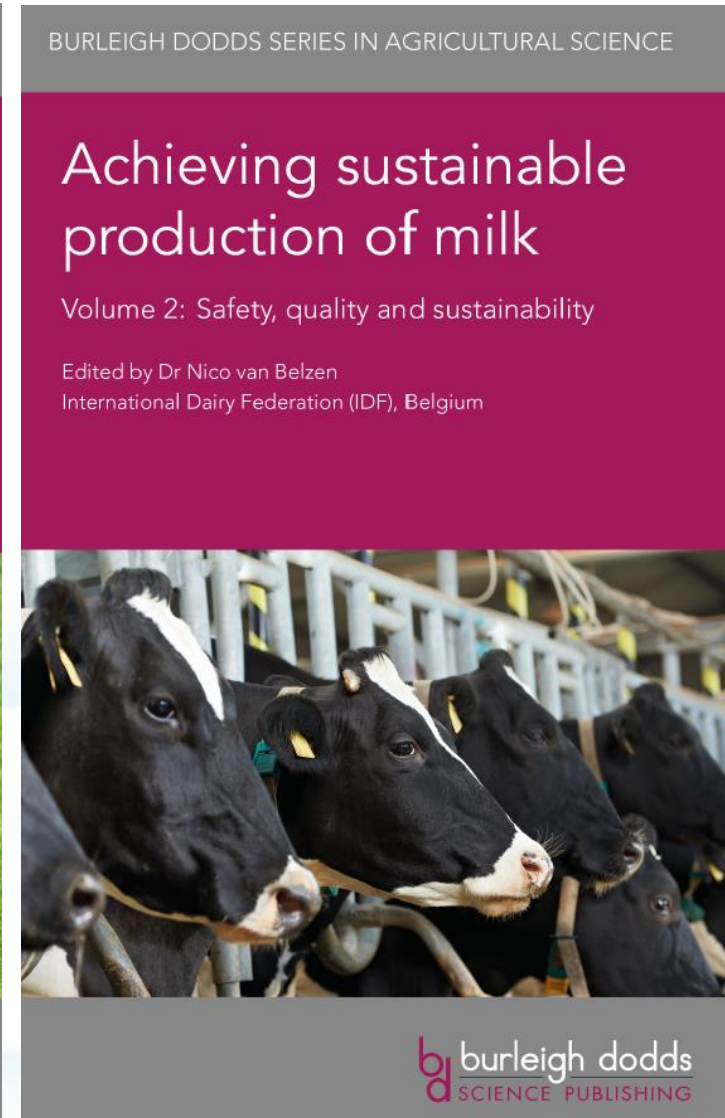
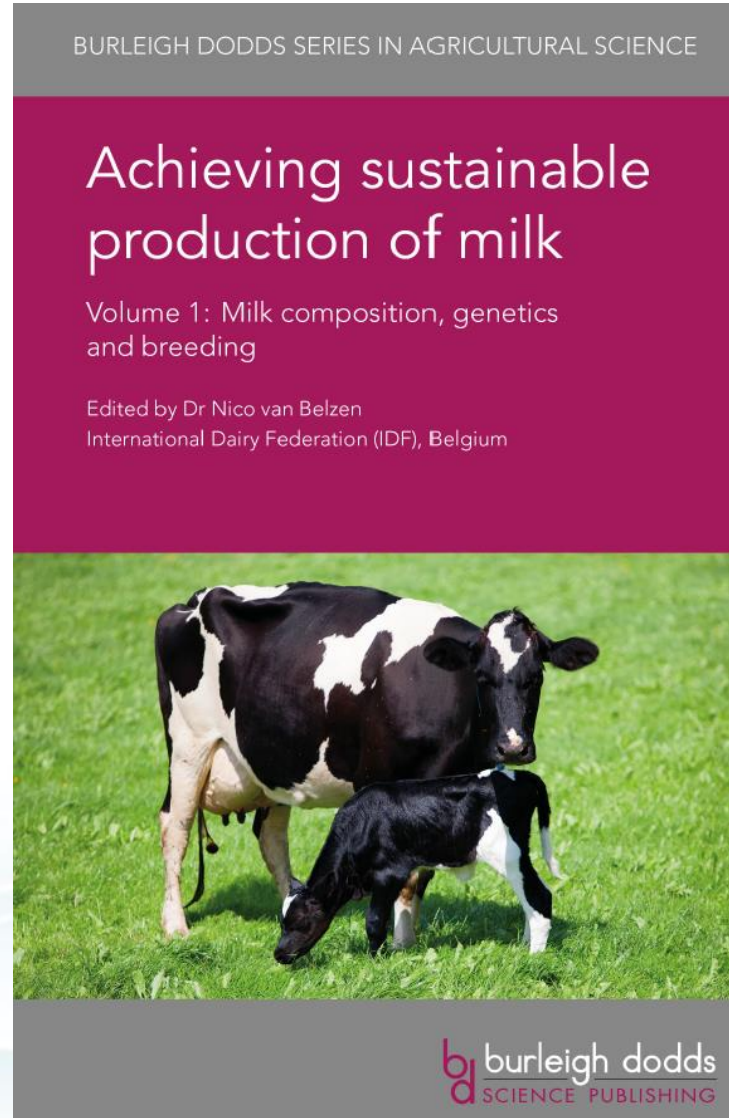
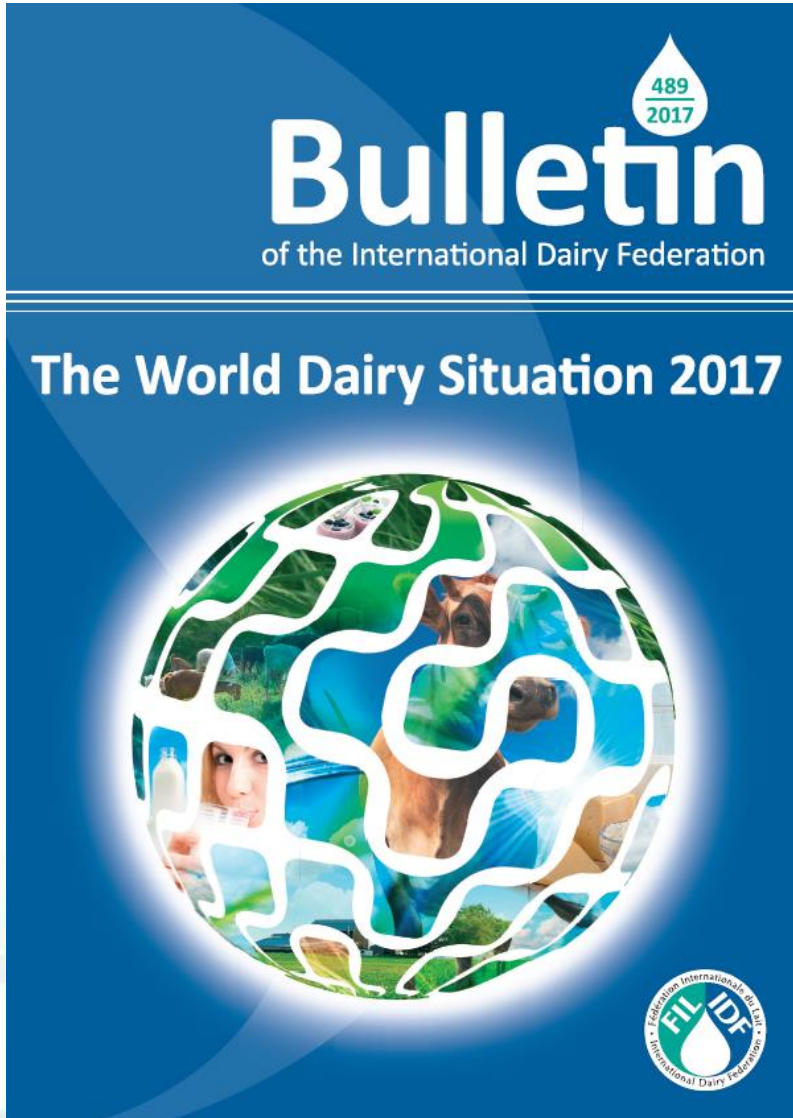


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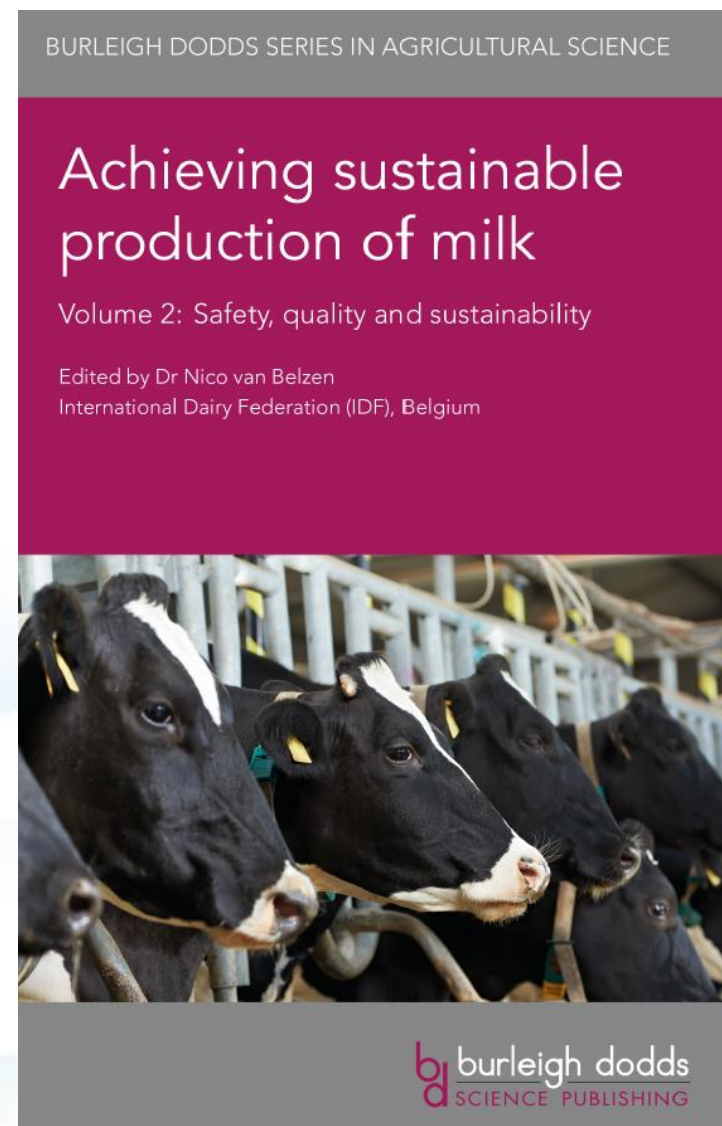
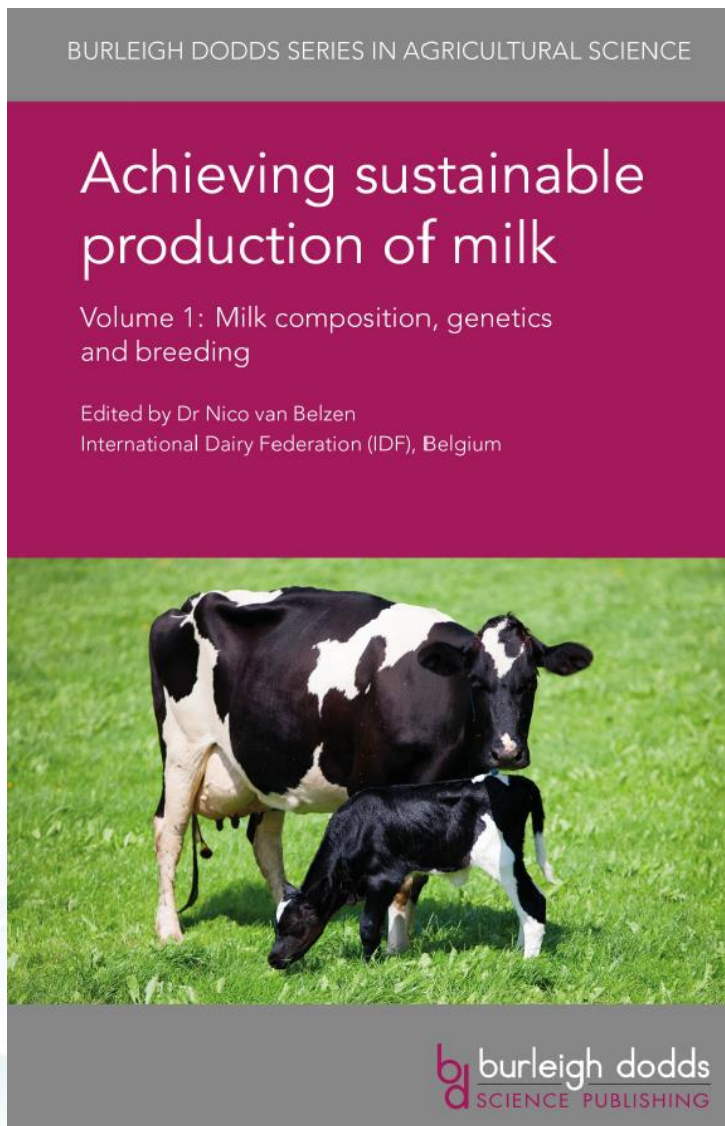
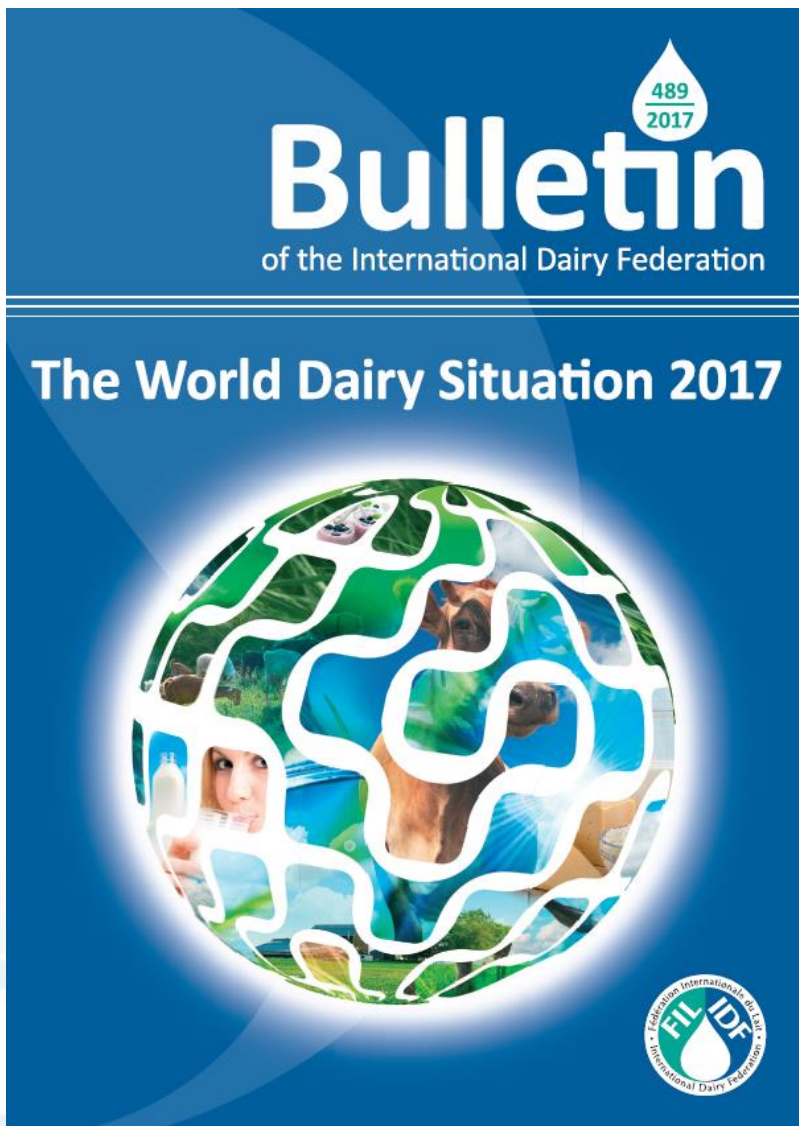
USD per tonne



Current state of the dairy sector

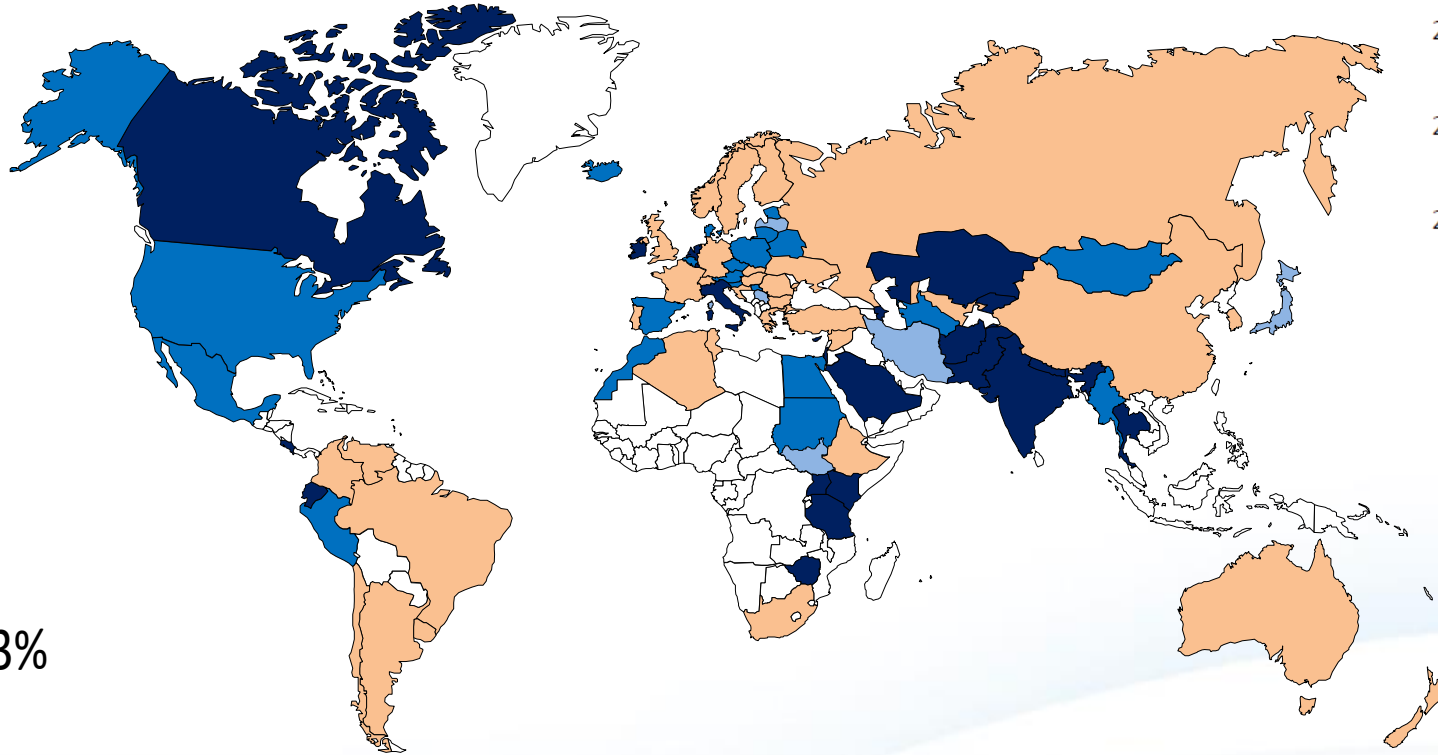


Estado actual del sector lácteo

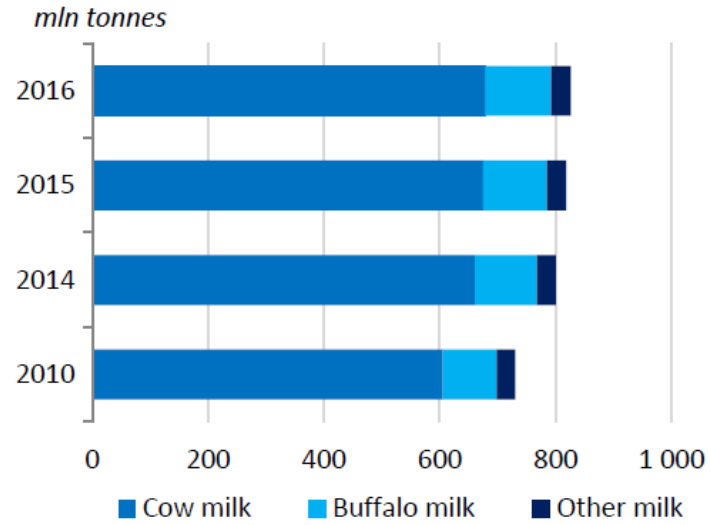


Milk production

Cow's milk production growth in 2016



World: milk production by species

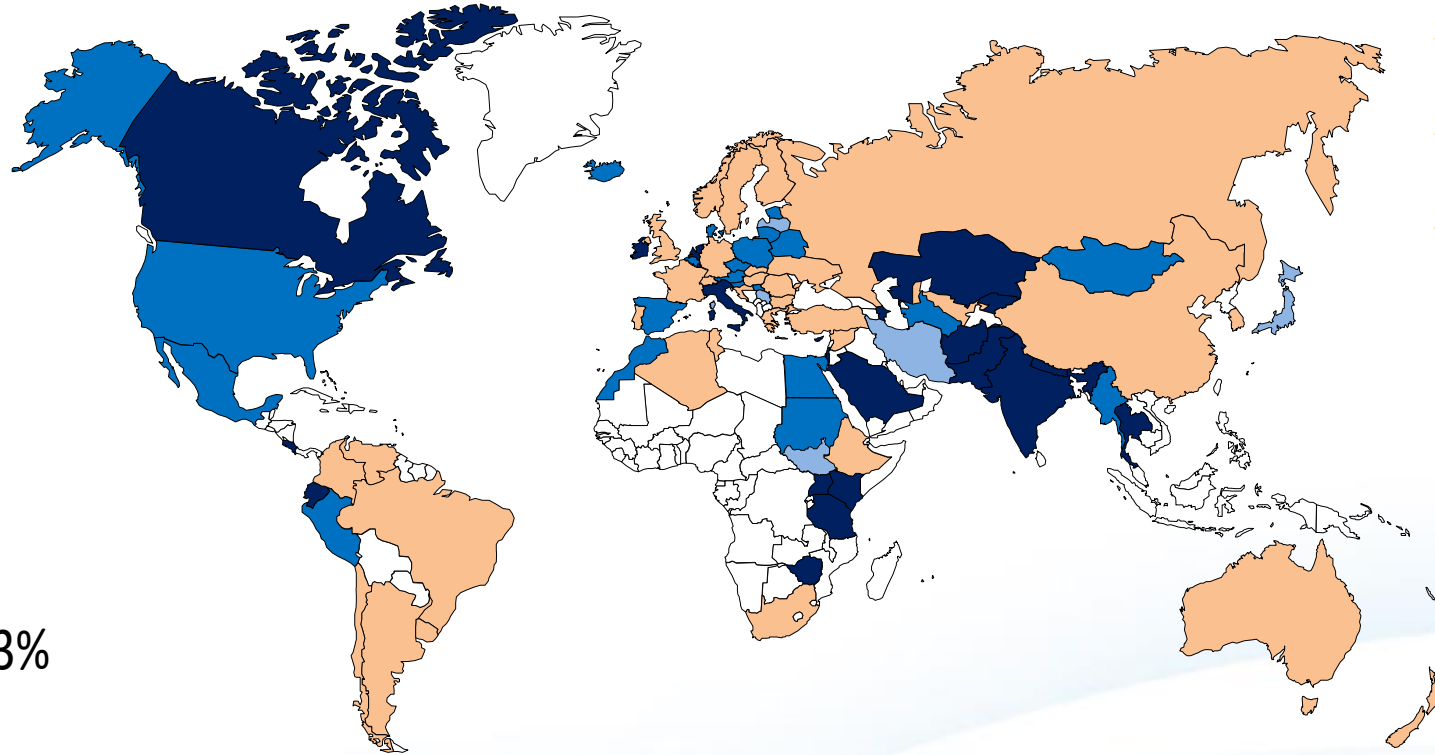


N.B.: Countries left blank produce less than 1 million tonnes annually.

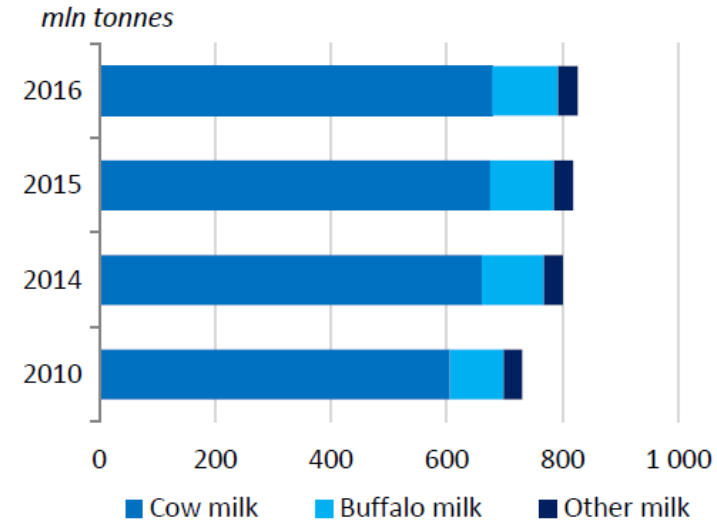
Source: IDF / CNIEL, ZuivelNL, FAO, IDF National Committees, national statistics.

Producción de leche

Crecimiento de la producción de leche de vaca en 2016



World: milk production by species

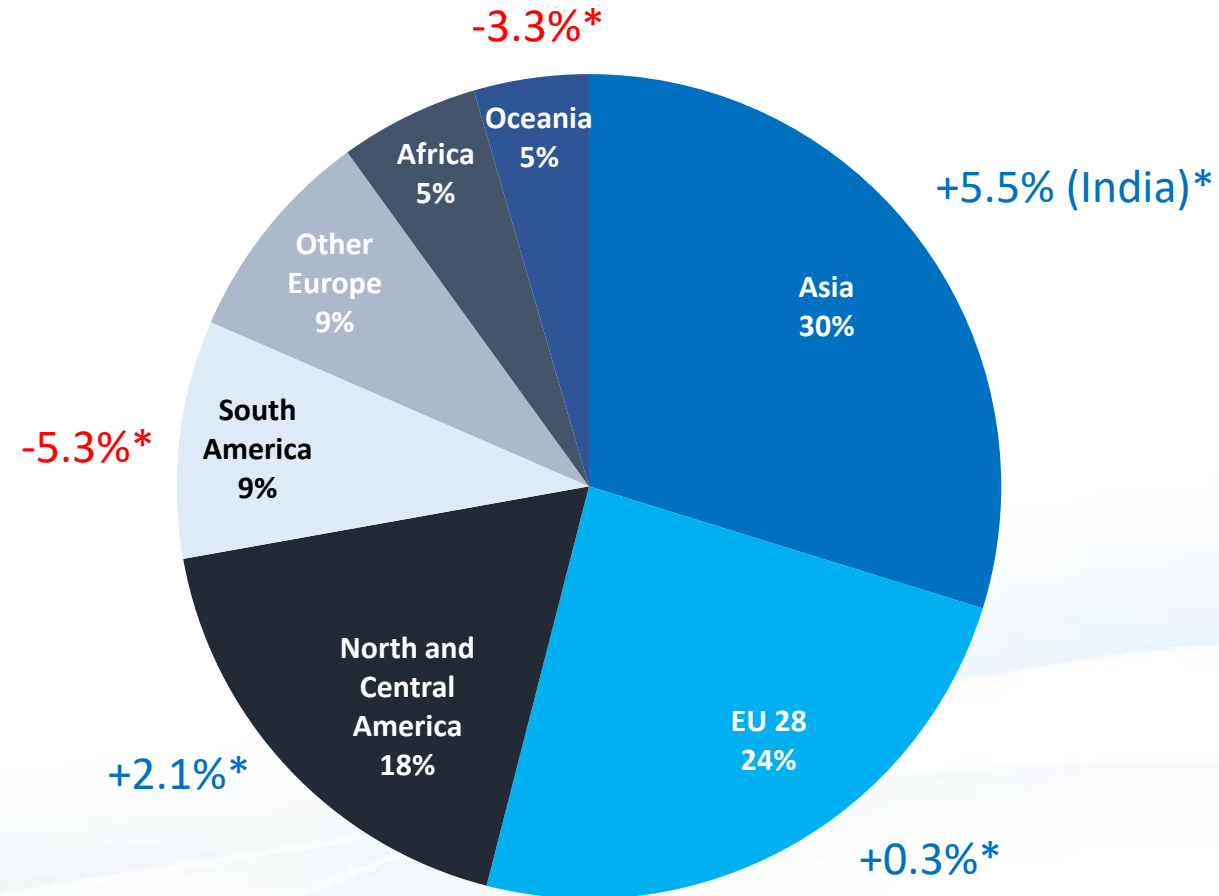


N.B.: Los países que quedan en blanco producen menos de 1 millón de toneladas anualmente

Source: IDF / CNIEL, ZuivelNL, FAO, IDF National Committees, national statistics.

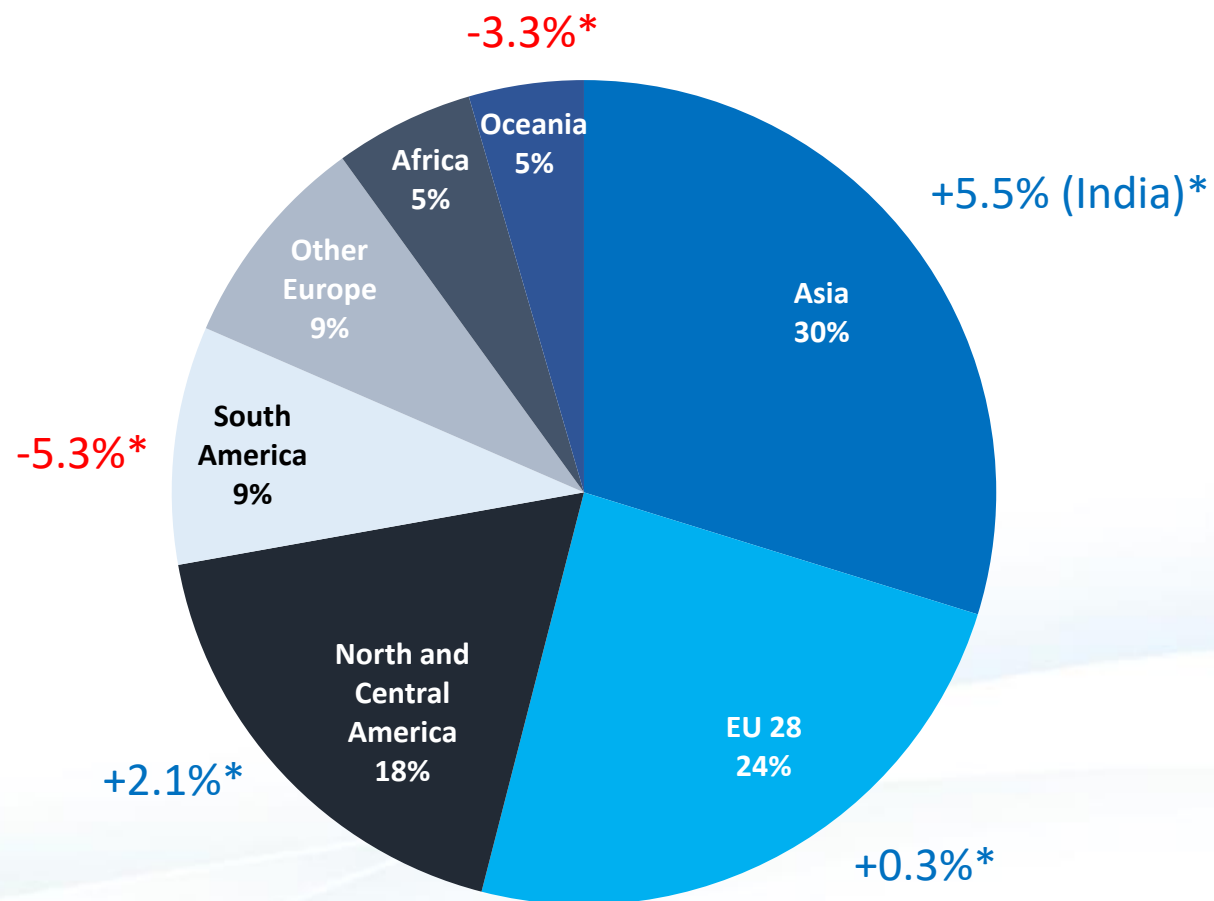
Milk production by region

World: cow's milk production (share per region)



Producción de leche por regiones

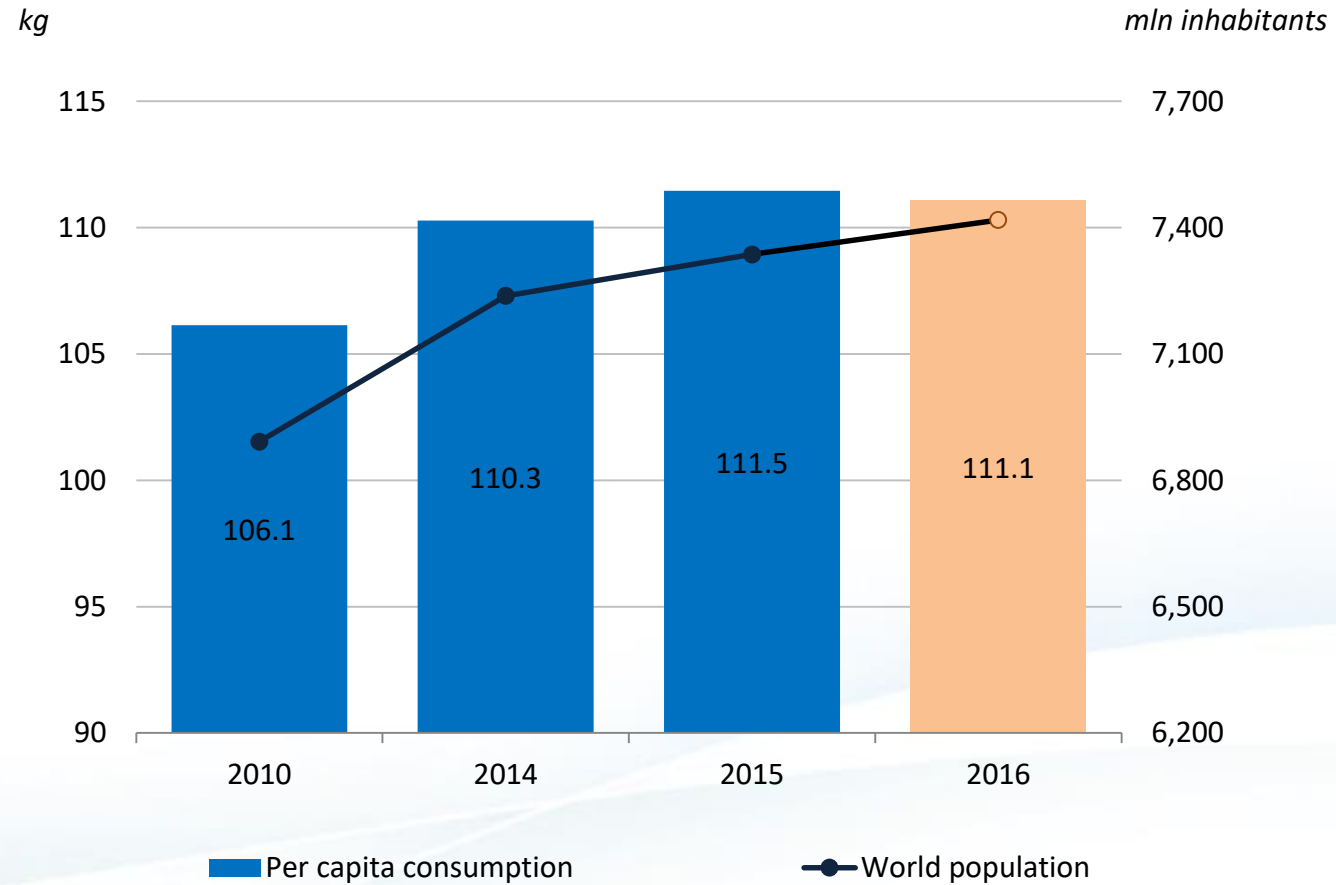
Producción de leche de vaca por regiones





Consumption

World: per capita consumption and population

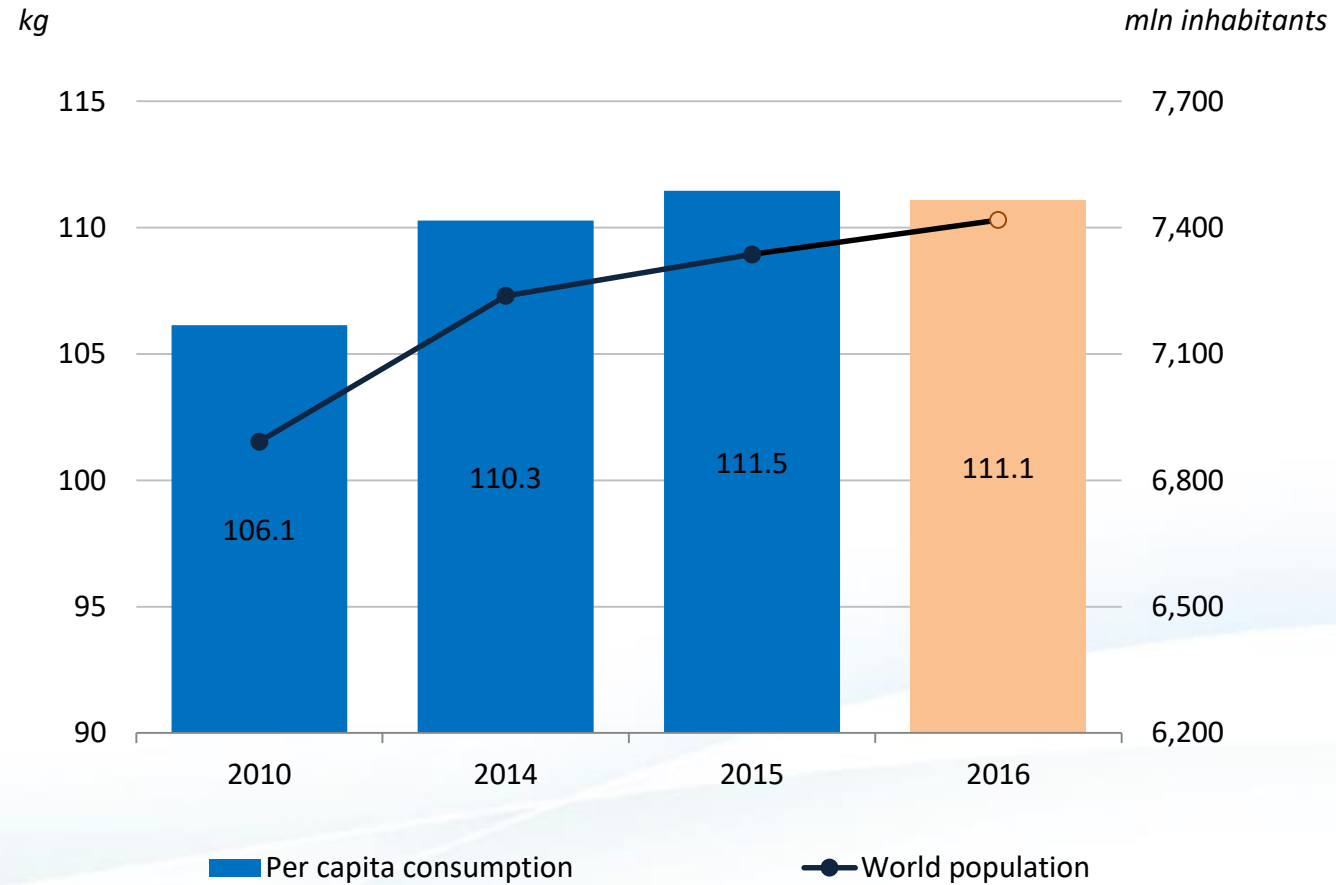


Source: IDF / CNIEL, ZuivelNL, IDF National Committees, national statistics.



Consumo

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Consumption

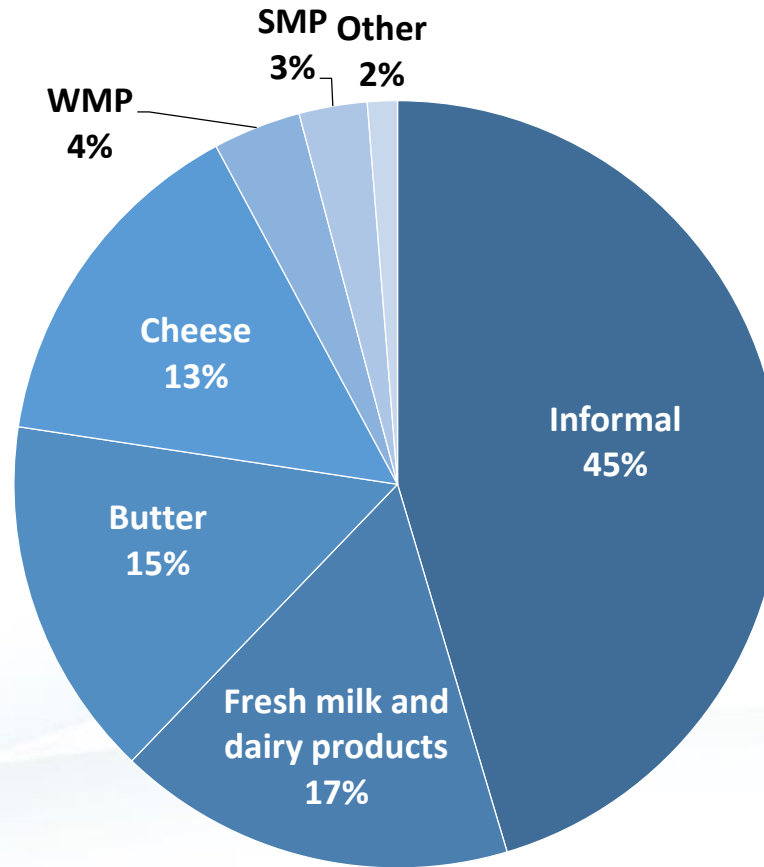


7.4 billion



111.1 kg/capita/year

Dairy consumption breakdown



Consumo

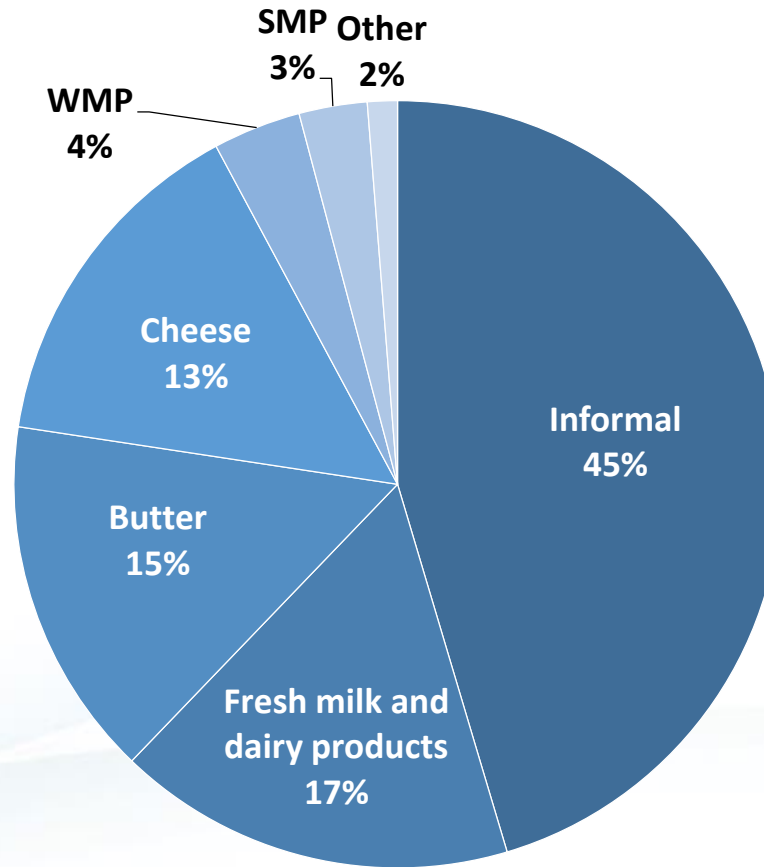


7.4 mil millones



111.1 kg/capita/año

Desglose de consumo de productos lácteos



World: self-sufficiency rate (per region)

Region	2010	2016
Asia	93%	91%
Europe	105%	109%
<i>EU</i>	<i>107%</i>	<i>112%</i>
<i>Non-EU</i>	<i>100%</i>	<i>102%</i>
North America	102%	108%
South America	102%	101%
Africa	88%	84%
Central America	82%	78%
Oceania	311%	311%

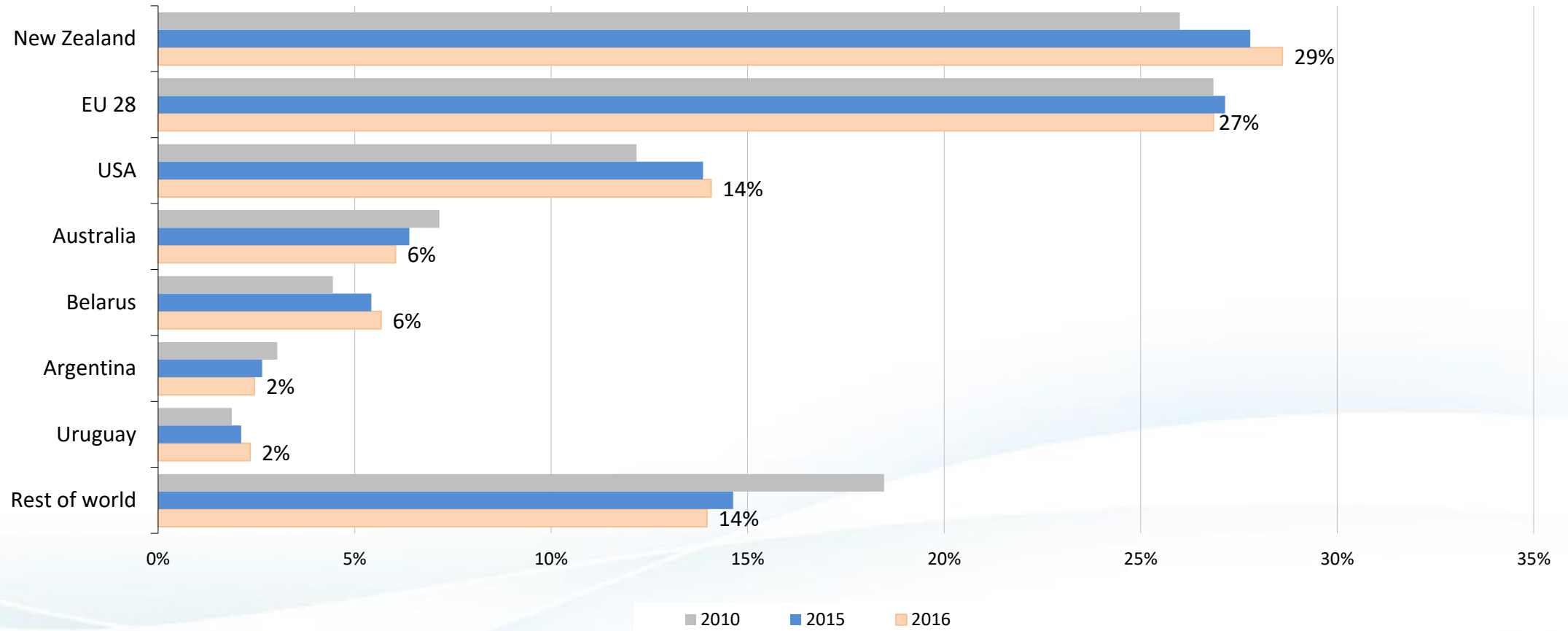
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Dairy trade

2010-2016 Export share of key exporters on the global dairy market (milk equivalent basis)

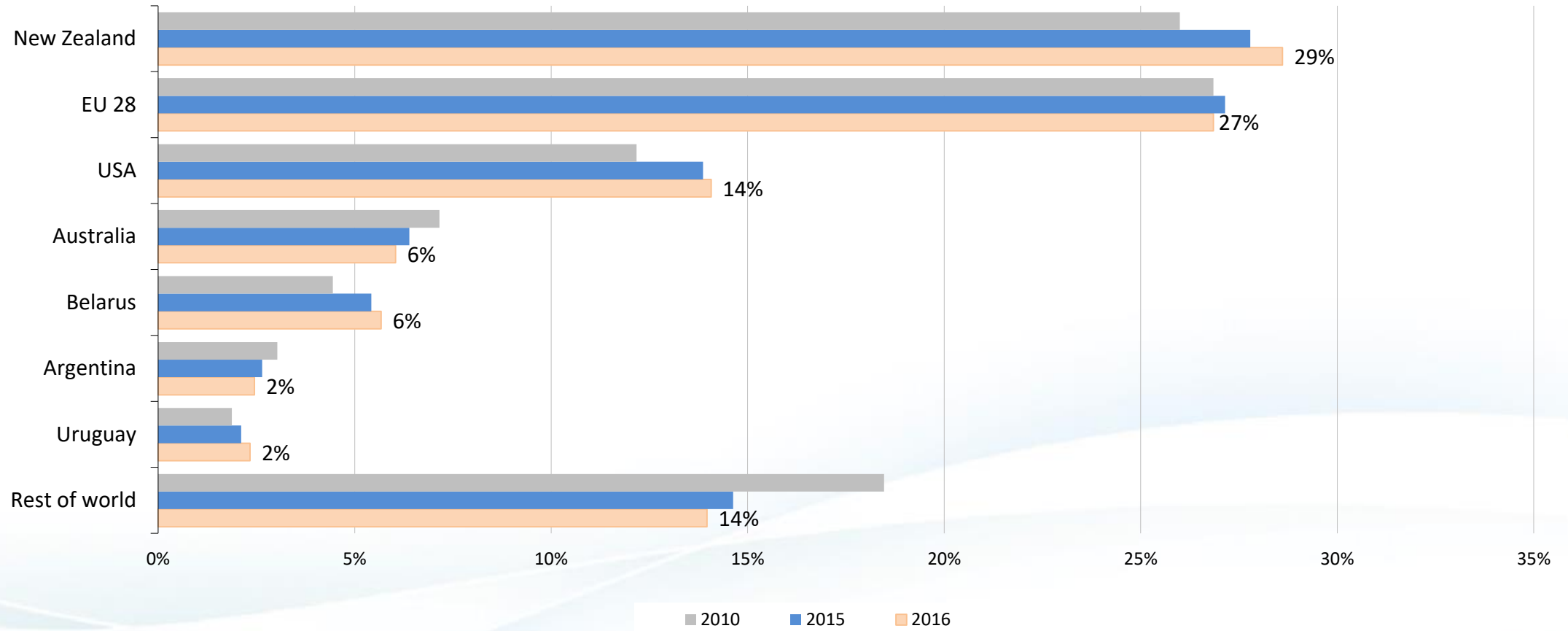


Source: IDF / ZuivelNL, Comtrade.



Comercio de leche

2010-2016 Export share of key exporters on the global dairy market (milk equivalent basis)



Source: IDF / ZuivelNL, Comtrade.



Future of the dairy sector

Futuro del sector lácteo

THE NUTRITIONAL GAP (FOR DAIRY)

Average intake in South America (2012)

Recommended intake in some countries

World population estimate	9.000.000.000		people in 2050
Assumed daily intake	0,48	0,75	liter milk / person / day
Assumed yearly intake	175	274	liter milk / person / year
Global demand	1.576.800.000	2.463.750.000	tonnes milk per year
Production in 2012 (FAOSTAT)	753.924.957		tonnes milk per year
Increase in demand	2,1	3,3	fold

DÉFICIT NUTRICIONAL PARA PRODUCTOS LÁCTEOS

Consumo promedio
en América del Sur
(2012)

Consumo
recomendado en
algunos países

Estimación de la población mundial	9.000.000.000		personas en el 2050
Supuesto consumo diario	0,48	0,75	litro de leche/ persona / día
Supuesto consumo anual	175	274	litro de leche/ persona / año
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Aumento de la demanda	2,1	3,3	veces

Can Livestock Production Meet the Growing Demand for Meat in Developing Countries?

◀ Borlaug's Passion for Agriculture and Why it's Needed Right Now | Main Page | Africa can end malnutrition but lessons must be learnt from front-runners ▶

By Louise Fresco
World Food Prize Council of Advisors

The short answer is yes. Livestock production cannot only meet the growing demand for animal proteins, but we absolutely need livestock to use the planet in a sustainable and healthy way.

Here is why: food production in the 21st century needs to be better matched to food consumption so as to avoid wasting produced biomass.

Yet many people feel that animal based food consumption should be reduced because of the larger ecological footprint compared to plant based food products. But is that really true? Alas, this is more complex than black versus white. Thinking in terms of circular food production systems rather than a linear food commodity chain explains this. A circular economy implies that we can retrieve all waste and transform it into livestock feed (and also fish, but that is not the question here). So in theory, nothing is wasted. Moreover, there are many parts of the world where growing crops or trees are not an option, but grazing livestock is. Animals can unlock nutrients from grasses that we humans cannot digest. So there is, in many areas, a logical synergy between animal and plant proteins. Small farmers all over the world know this and use animal manure and traction for their fields. Here however, we are talking about complementarity at continental or even global levels.



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Dr. Louise Fresco



🏠 > Early Edition > Robin R. White, doi: 10.1073/pnas.1707322114

 Check for updates

Nutritional and greenhouse gas impacts of removing animals from US agriculture

Robin R. White^{a,1,2} and Mary Beth Hall^{b,1,2}

Author Affiliations 

Edited by B. L. Turner, Arizona State University, Tempe, AZ, and approved September 25, 2017 (received for review May 5, 2017)

Abstract

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Significance

US agriculture was modeled to determine impacts of removing farmed animals on food supply adequacy and greenhouse gas (GHG) emissions. The modeled system without animals increased total food production (23%), altered foods available for domestic consumption, and decreased agricultural US GHGs (28%), but only reduced total US GHG by 2.6 percentage units. Compared with systems with animals, diets formulated for the US population in the plants-only systems had greater excess of dietary energy and resulted in a greater number of deficiencies in essential nutrients. The results give insights into why decisions on modifications to agricultural systems must be made based on a description of direct and indirect effects of change and on a dietary, rather than an individual nutrient, basis.

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Nutritional and greenhouse gas impacts of removing animals from US agriculture

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