



# CURRENT SITUATION AT THE GLOBAL DAIRY MARKET

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# A WORLD OF COMPLEXITY, CHANGE AND UNCERTAINTY



- Agriculture and food systems are being disrupted and challenged by a diversity of crisis:
  - climate (flood and dry)
  - economics and
  - geopolitics
- The global dairy sector needs to be prepared to operate in this new world of complexity, change and uncertainty.
- RESILIENCE & COLLABORATION are key!

# GLOBAL DAIRY SECTOR'S SOCIO-ECONOMIC IMPACT



- Nourishes 6 billion people
- Provides livelihoods for 1B+
- 150M farm households
- 750M people are engaged in milk production



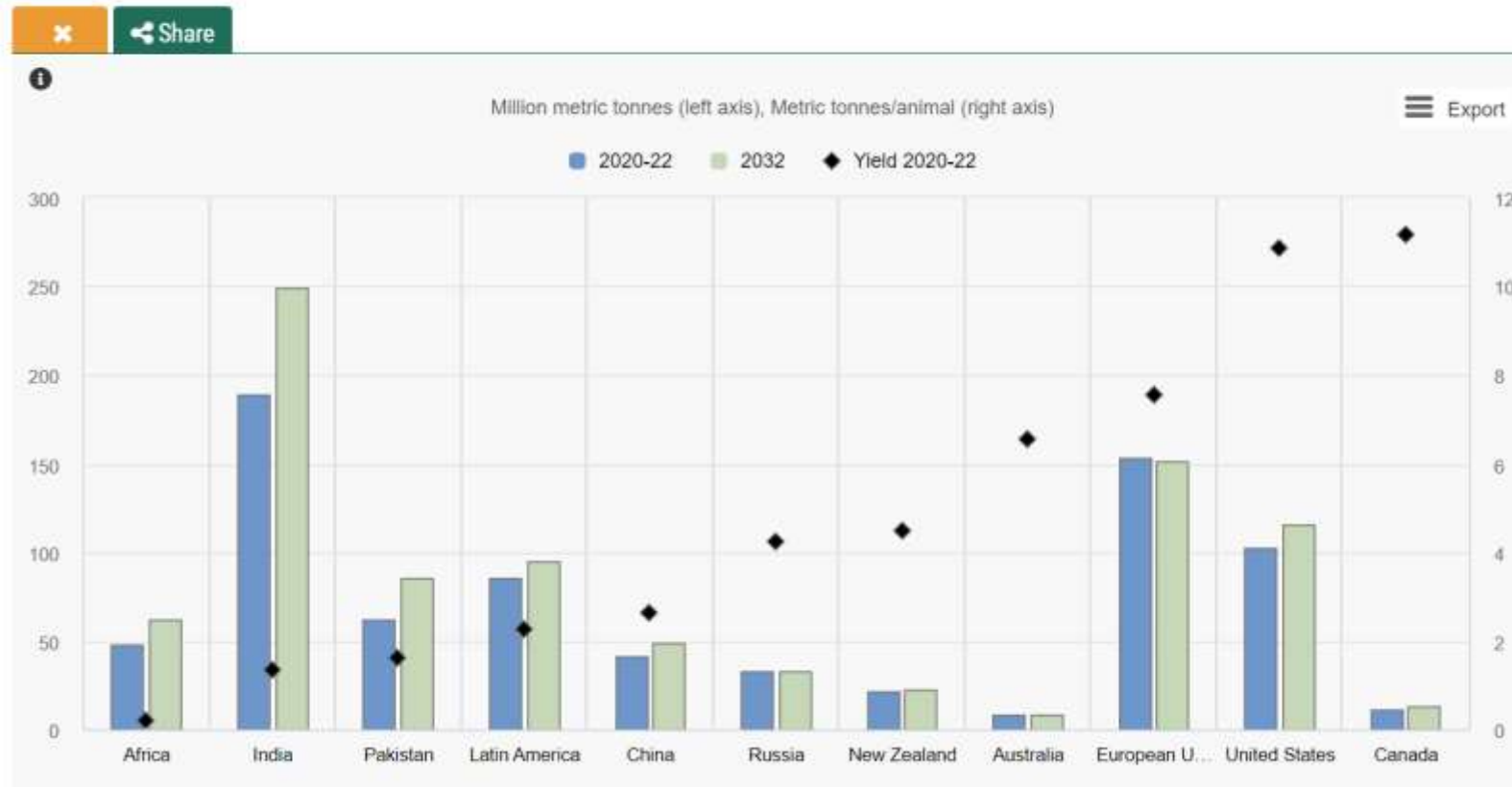
Sources: FAO, IFCN



# MILK PRODUCTION



Figure 7.4. Milk production and yield in selected countries and regions

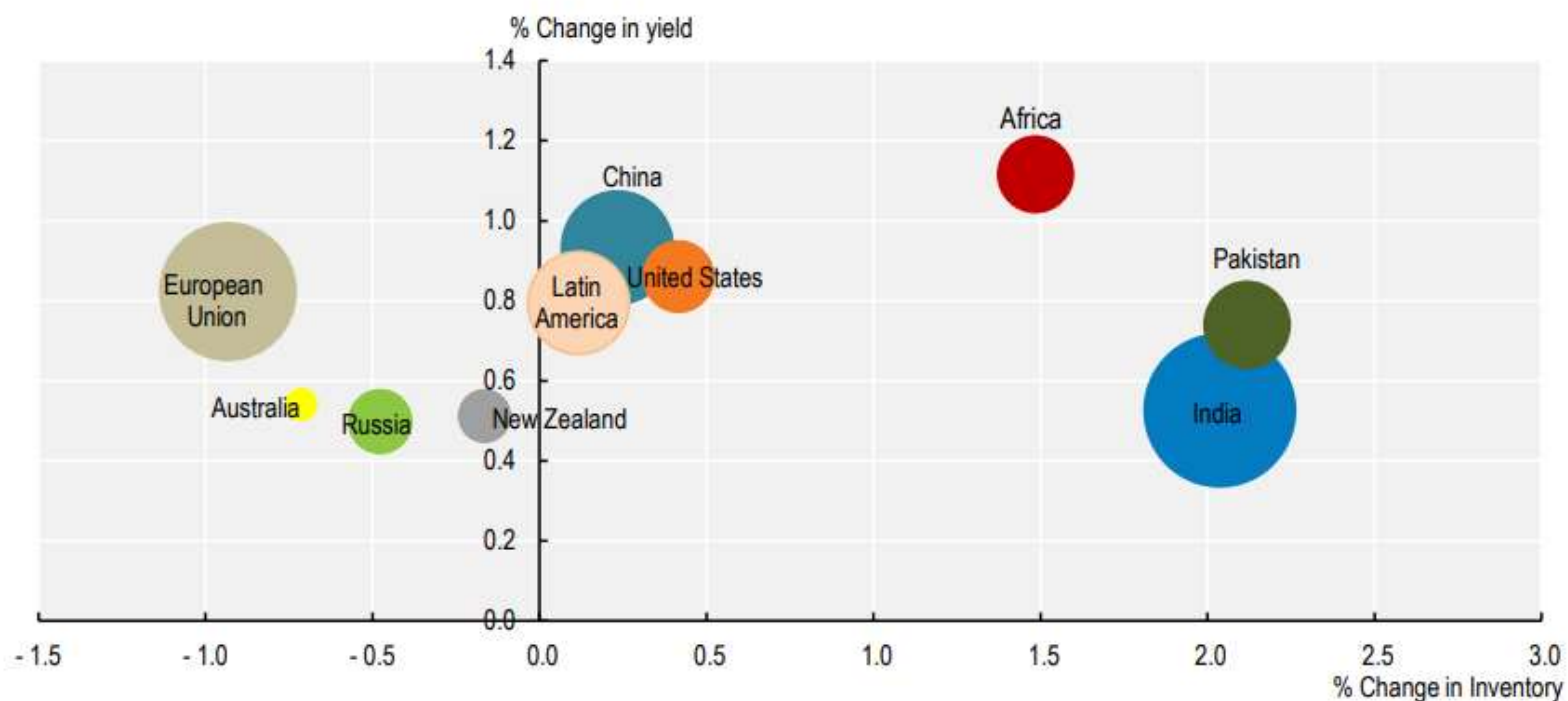


OECD agricultural  
outlook 2023

See also  
Rabobank forecast  
dairy production  
and consumption  
IFCN

# SIZE OF DAIRY HERD

Figure 7.3. Annual changes in inventories of dairy herd and yields between 2022 and 2032



Note: The size of the bubbles refers to the total milk production in the base period 2020-22.

Source: OECD/FAO (2023), "OECD-FAO Agricultural Outlook", OECD Agriculture statistics (database), <http://dx.doi.org/10.1787/agr-outl-data-en>.



# MILK PRODUCTION

## TOP 20 COWS' MILK PRODUCERS IN 2023



Country	2023 mln tonnes	Growth 2022/23 (%)
EU 27	154.1	-0.2%
Germany	32.6	+0.6%
France	23.9	-2.6%
Poland	15.4	+1.5%
Netherlands	14.7	+0.8%
Italy	13.1	-0.8%
India <sup>(B)</sup>	128.6	+7.4%
USA	102.7	-0.0%
China	42.0	+6.8%
Brazil	36.8	+3.2%
Russia	33.6	+2.5%
New Zealand	21.3	+0.9%
Pakistan <sup>(C)</sup>	20.9	+3.8%
Türkiye	20.0	+0.2%
United Kingdom	15.5	+0.0%
Mexico	13.7	+1.7%
Bangladesh	12.7	+7.6%
Uzbekistan	11.9	+3.0%
Argentina	11.7	-2.0%
Canada	10.6	+1.4%
Australia <sup>(D)</sup>	8.6	+3.1%
Belarus	8.3	+5.9%
Iran	7.5	0.0%
Colombia	7.3	-4.3%
Japan	7.3	-4.2%



(B) Dairy years ending March of the following year.

(C) Dairy years ending June of the following year; milk production for human consumption.

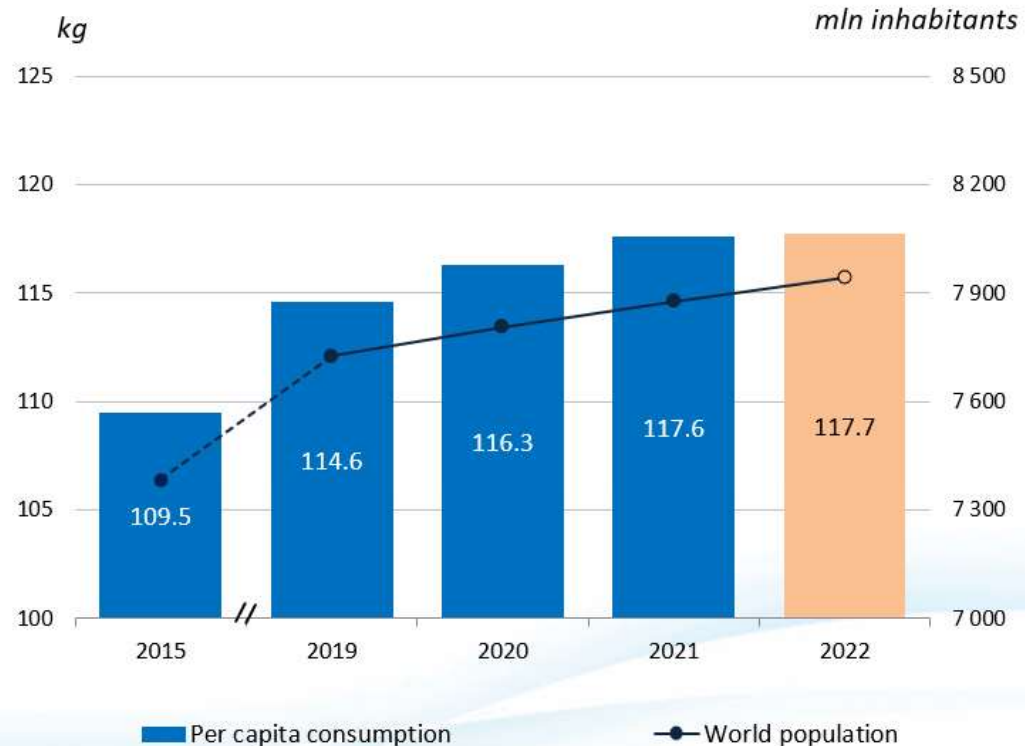
(D) Dairy years ending June of the following year.

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

# DEMAND



World: per capita consumption and population



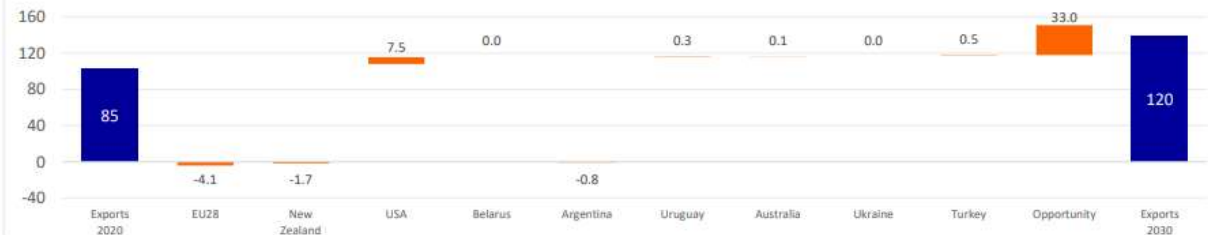
## Global dairy supply and demand outlook

Updated 2023

Import Bridge: million tons liquid milk equivalents

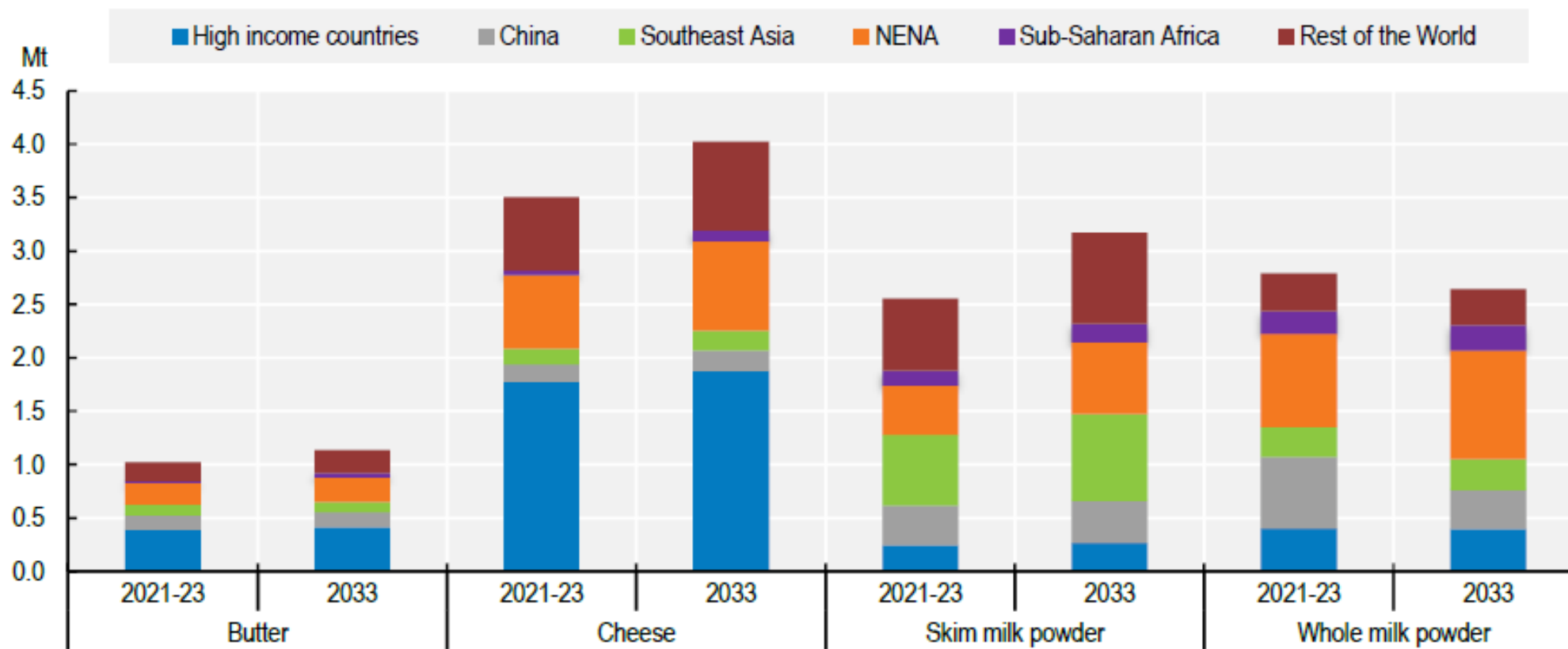


Export Bridge: million tons liquid milk equivalents



Source: Rabobank, 2023

# IMPORTS OF DAIRY PRODUCTS BY REGION



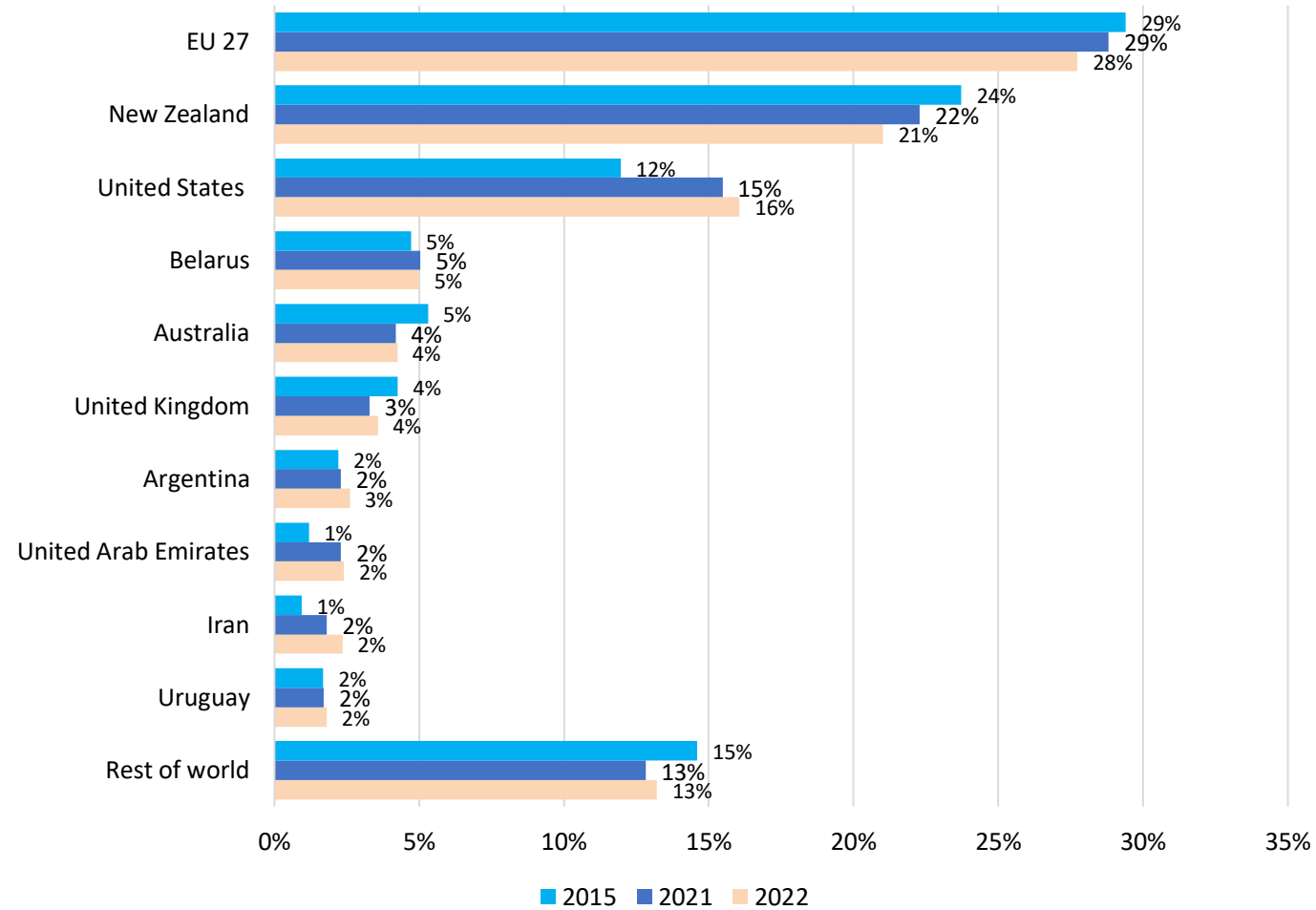
Note: NENA stands for Near East and North Africa, and is defined as in Chapter 2. Southeast Asia contains Indonesia, Malaysia, Philippines, Thailand and Viet Nam.

Source: OECD/FAO (2024), "OECD-FAO Agricultural Outlook", OECD Agriculture statistics (database), <http://dx.doi.org/10.1787/agr-outl-data->



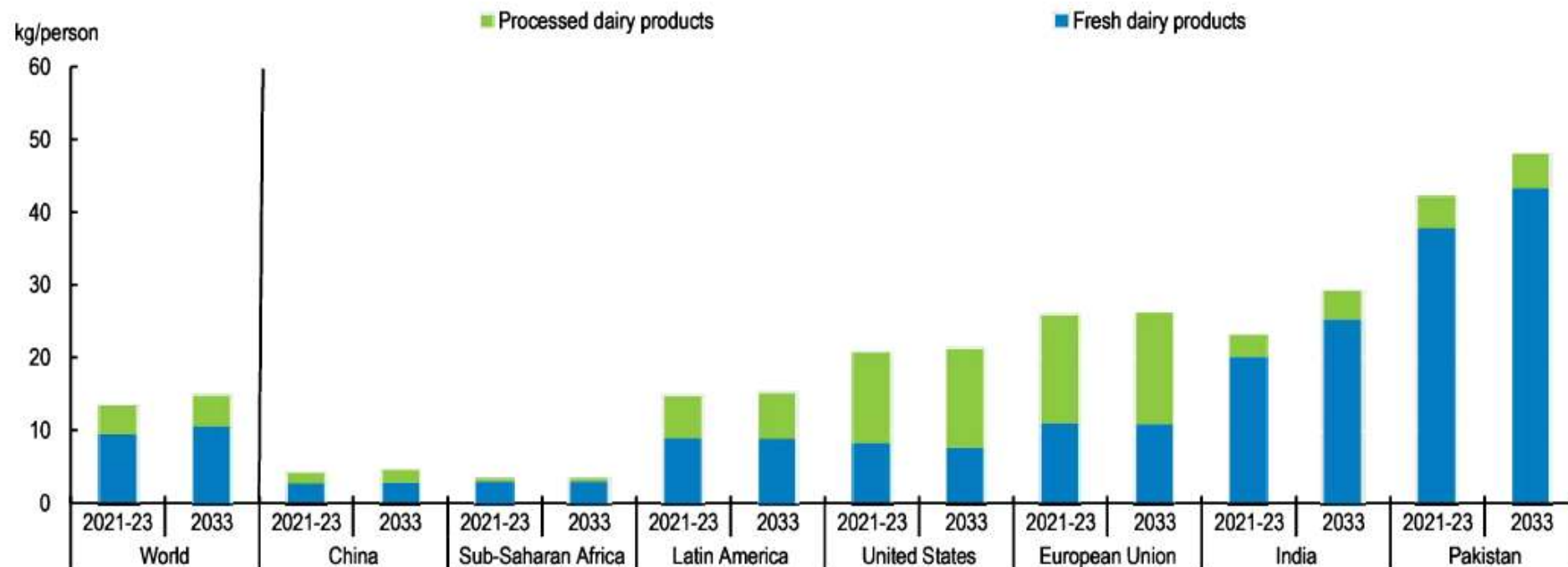
# Dairy Trade

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



Source : ZuivelNL, Comtrade

# PER CAPITA CONSUMPTION OF PROCESSED AND FRESH DAIRY PRODUCTS IN MILK SOLIDS



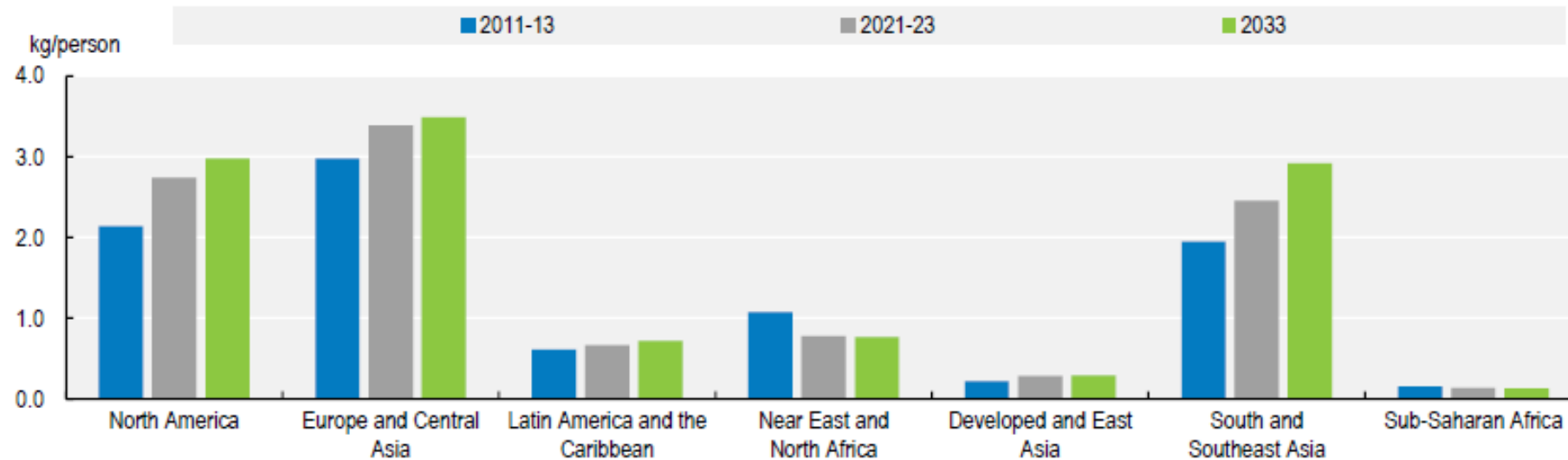
Note: Milk solids are calculated by adding the amount of fat and non-fat solids for each product; Processed dairy products include butter, cheese, skim milk powder and whole milk powder.

Source: OECD/FAO (2024), "OECD-FAO Agricultural Outlook", OECD Agriculture statistics (database), <http://dx.doi.org/10.1787/agr-outl-data-en>.

# GLOBAL CONSUMPTION – BUTTER



Figure 7.3. Per capita consumption of butter in selected regions

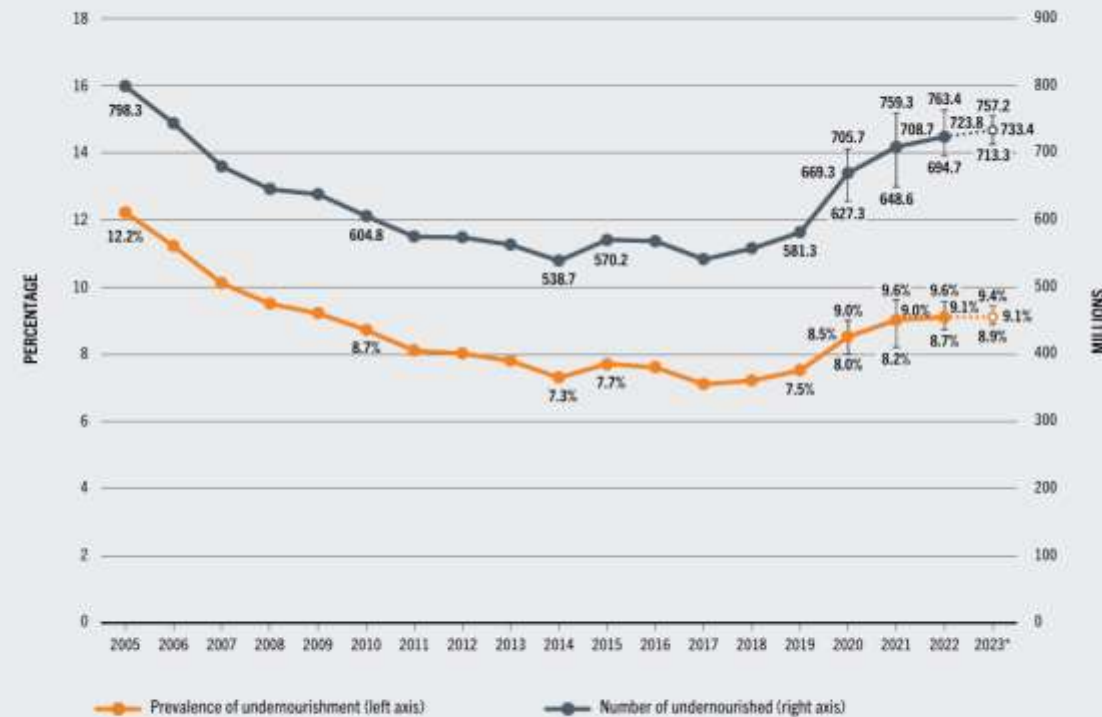


Source: OECD/FAO (2024), "OECD-FAO Agricultural Outlook", OECD Agriculture statistics (database), <http://dx.doi.org/10.1787/agr-outl-data-en>.

# FOOD INSECURITY IS ON THE RISE



**FIGURE 1** GLOBAL HUNGER ROSE SHARPLY FROM 2019 TO 2021 AND PERSISTED AT THE SAME LEVEL TO 2023



NOTES: Bars show lower and upper bounds of the estimated range. \* Projections based on nowcasts for 2023 are illustrated by dotted lines.

SOURCE: FAO. 2024. FAOSTAT: Suite of Food Security Indicators. [Accessed on 24 July 2024]. <https://www.fao.org/faostat/en/#data/FS>;

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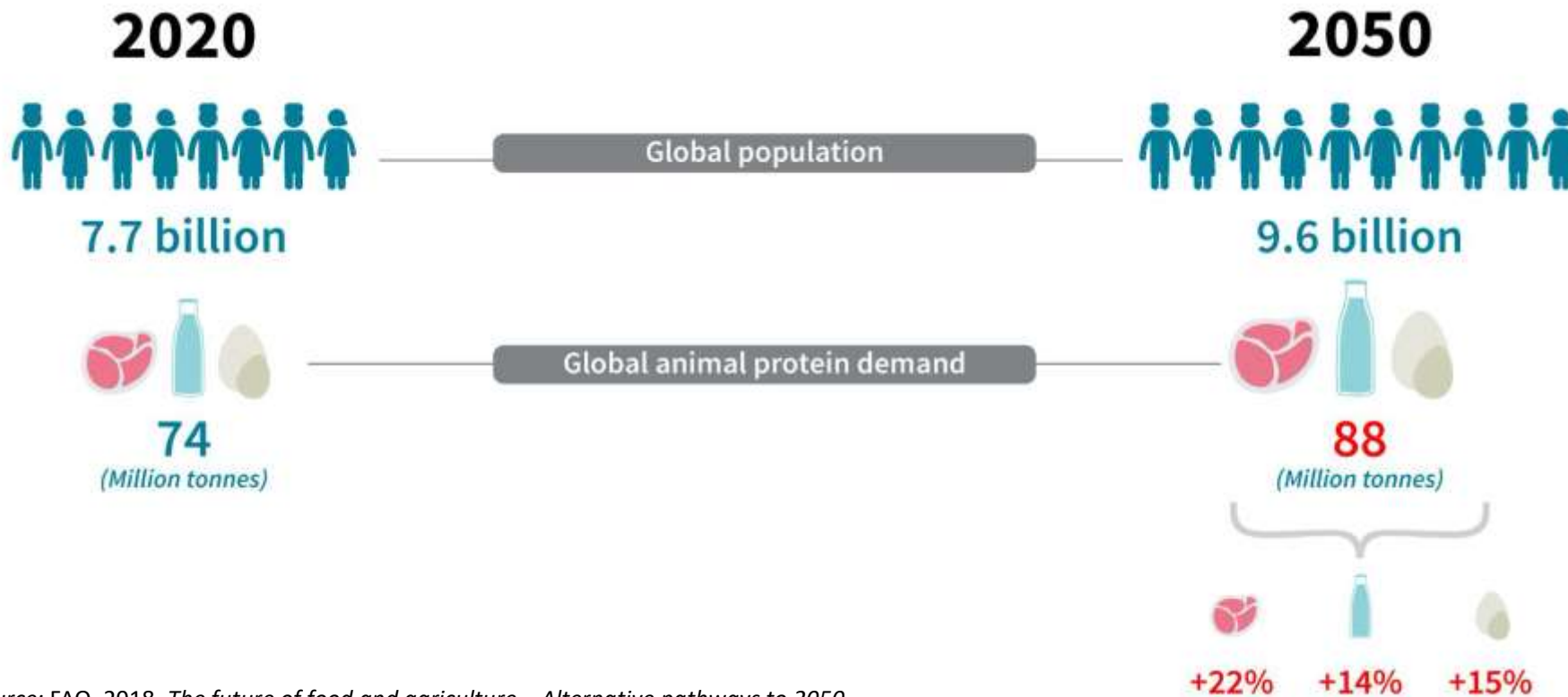


Food and Agriculture  
Organization of the  
United Nations



# How to feed people in this planet?

Population growth and global demands of animal-source foods



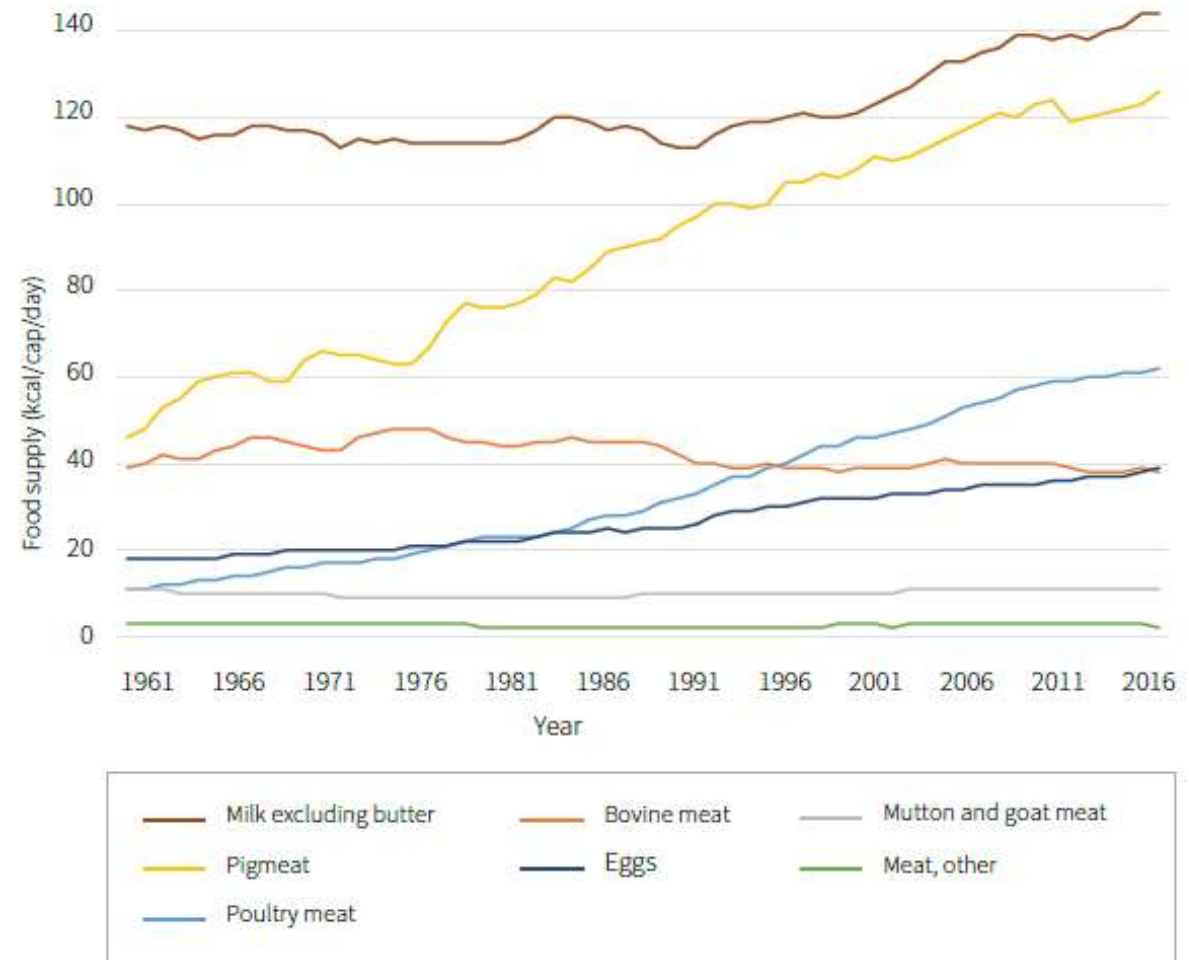
Source: FAO. 2018. *The future of food and agriculture – Alternative pathways to 2050.*



# Dietary patterns and trends of terrestrial animal source food

- 18% of all food energy
- 34% of global protein consumption, importantly high quality protein
- Provide high proportions of critical macro- and micronutrients: vitamin A, B12, calcium, iron, zinc, among others

Figure A3. Trends in global food supply of terrestrial animal source food





# HOW DOES IDF SUPPORTS THE DAIRY SECTOR

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# GLOBAL REACH



- Established in 1903
- Members in 40 countries representing 2/3 of world milk production
- Accredited to the FAO, Codex, WOAHA, UNEP, UNFCCC, ISO, ECOSOC
- Collaborate with IGO's and several other international organizations - IICA, GDP, DSF, WFO, OECD, GASL, FEPAL, etc.



# REPRESENTING THE ENTIRE DAIRY SECTOR



- Dairy Farmers
- Milk processors
- National dairy organizations
- Academia/non-profit research institutes
- Government (Ministry of Agriculture)
- Suppliers
- Milk Sector Employees

# ENGAGEMENT WITH STAKEHOLDERS



FAO

CODEX

WHO

WOAH

ISO

CFS

OECD

WVA

GDP

GASL

ICAR

IICA

DSF

LEAP

IUFOST

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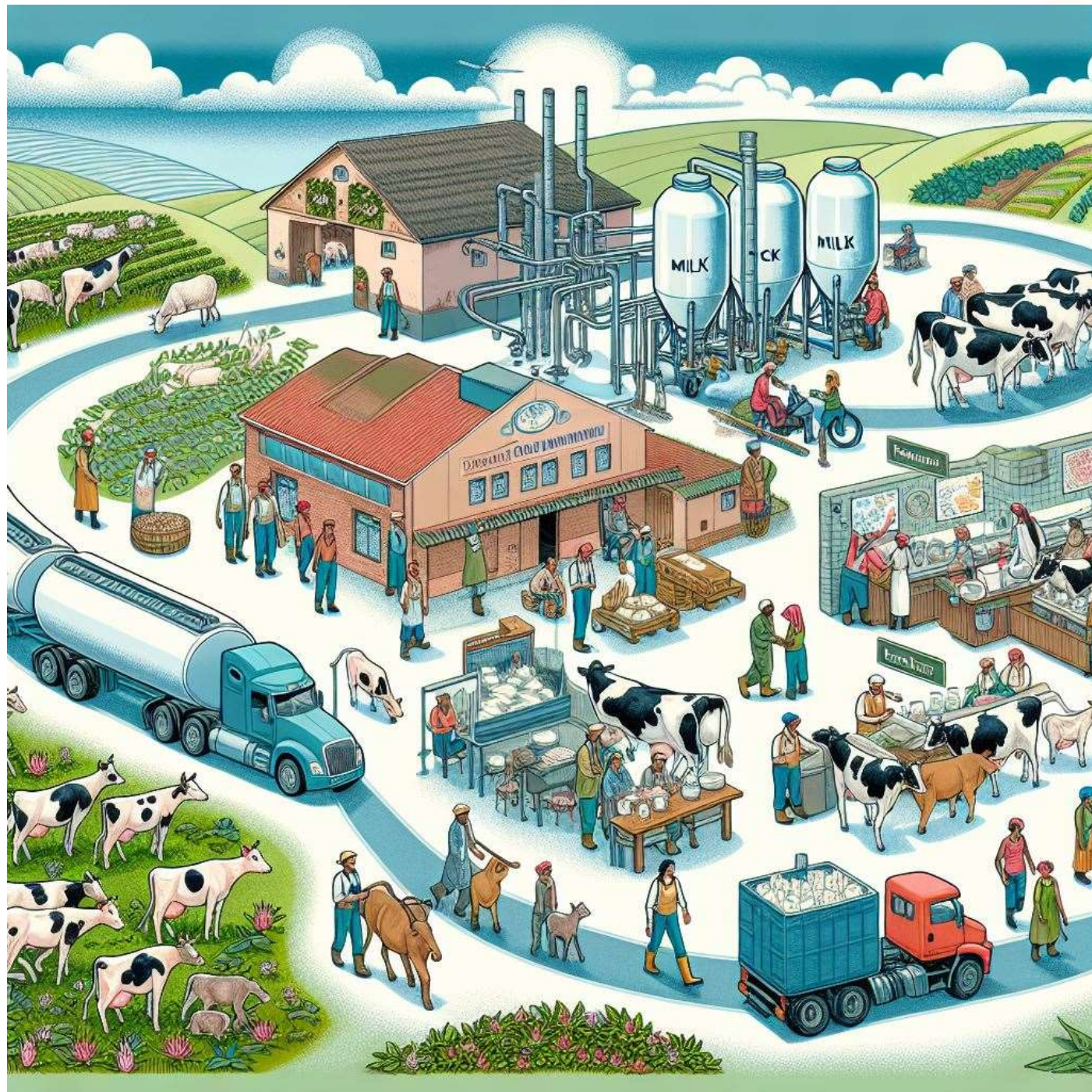
# IDF IS THE SECTORS' MAIN PLATFORM TO ADDRESS GLOBAL CHALLENGES AND OPPORTUNITIES



- Considerations to be given to the role dairy plays in nourishing and livelihoods.
- Global challenges – local solutions
- Trade offs
- Setting up enabling environments that support dialogue with all actors to consider holistic approaches

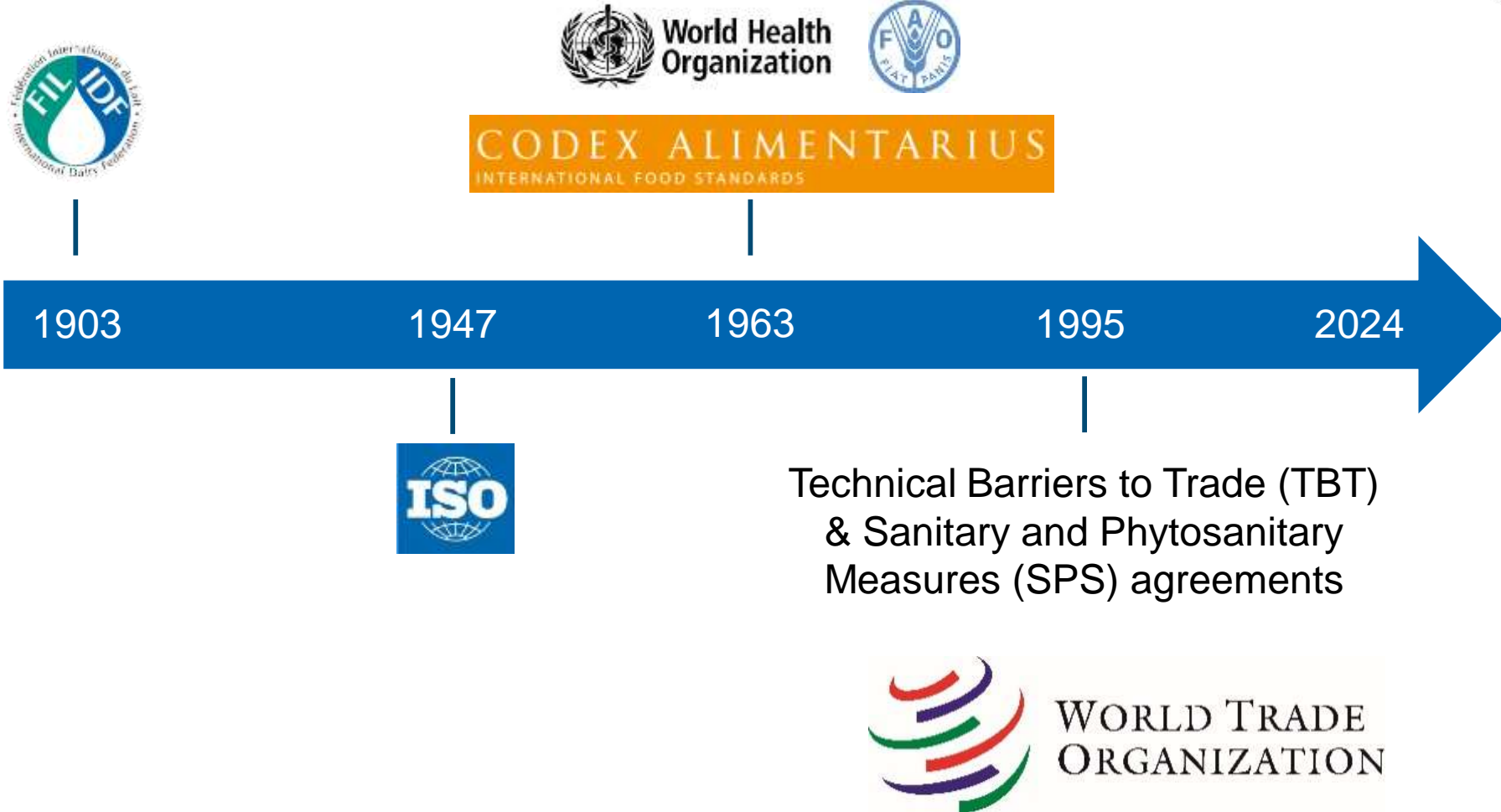




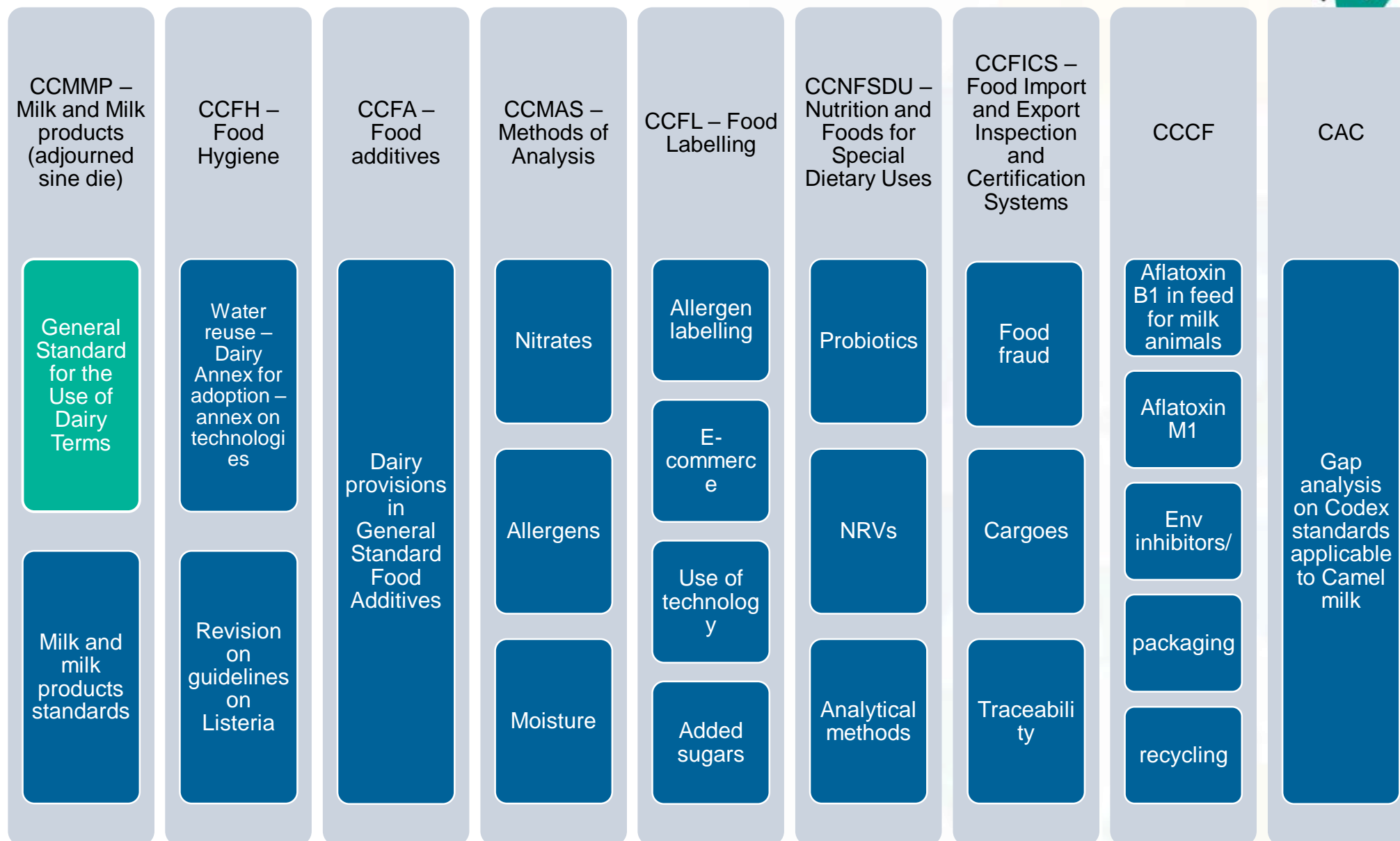




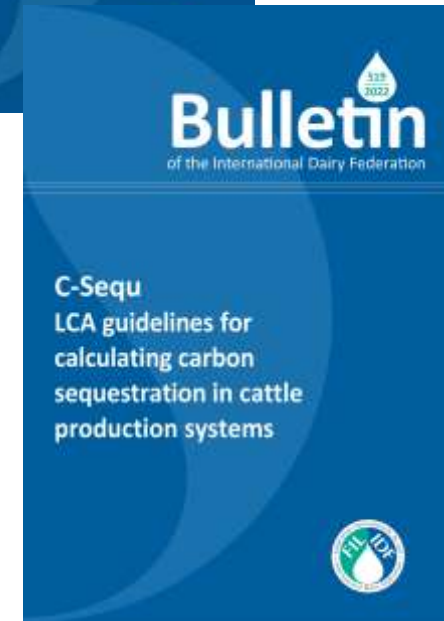
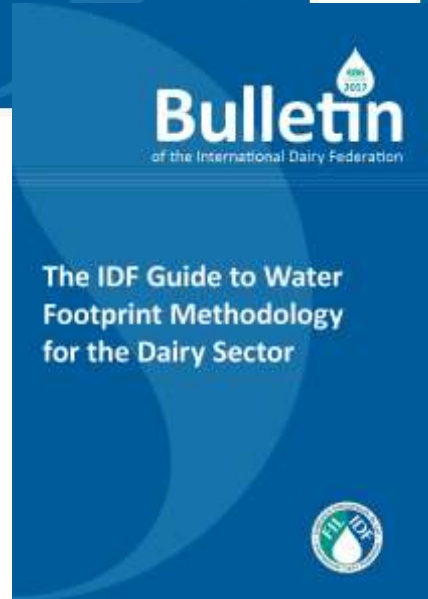
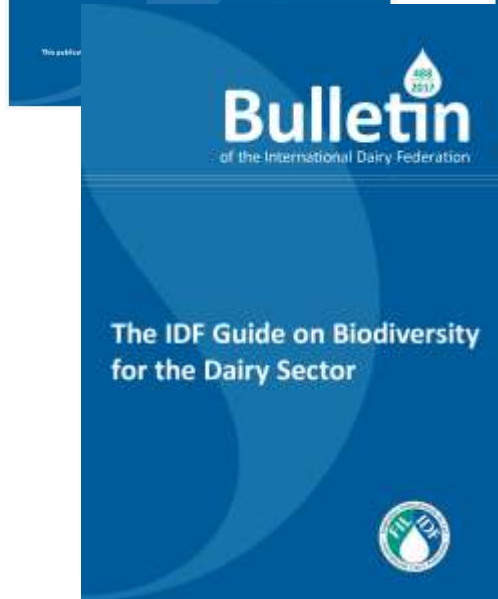
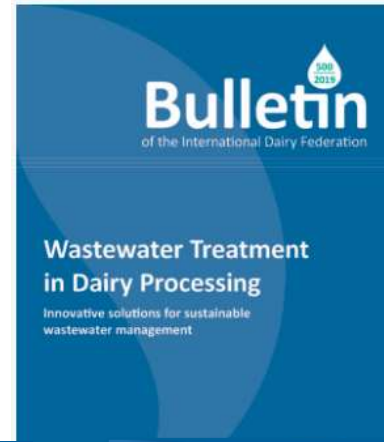
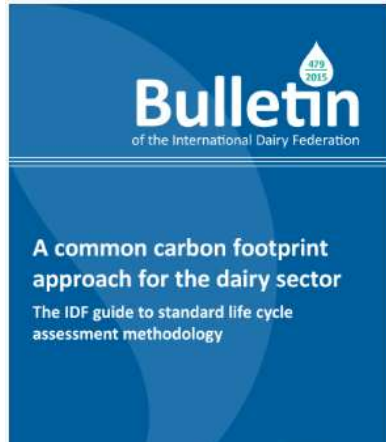
# STANDARD COOPERATION MILESTONES TO SUPPORT FOOD SAFETY AND FAIR TRADE



# CODEX – ADVOCACY WORK – ON-GOING



# IDF METHODOLOGIES AND ENVIRONMENTAL SUSTAINABLE PRACTICES





# HEAT STRESS IN DAIRY CATTLE



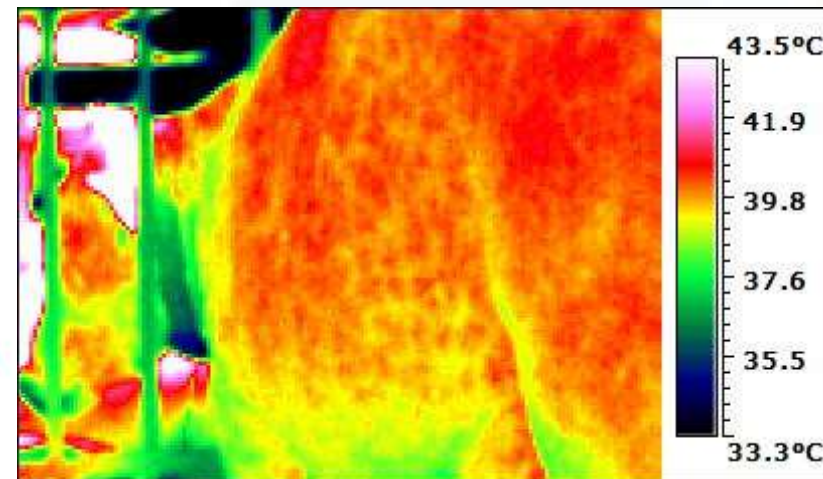
## Experience:

- ↑ discomfort\*
- ↓ milk production
- ↓ reproduction/fertility
- ↑ disease risk
- ↑ mortality

## Changes lead to:

- ↓ welfare\*
- ↑ public concern
- ↓ income
- ↑ costs
- ↑ environmental footprint\*
- ↓ food supply

Publication April 2025



+ long-lasting consequences: 3<sup>rd</sup> lactation

\*Research by Tresoldi et al.

# IDF EVENT ON NON-COW MILK



## Book of abstracts: 8th IDF international symposium on sheep, goat & other non-cow milk

**FREE**

Language

EN

Type

PDF

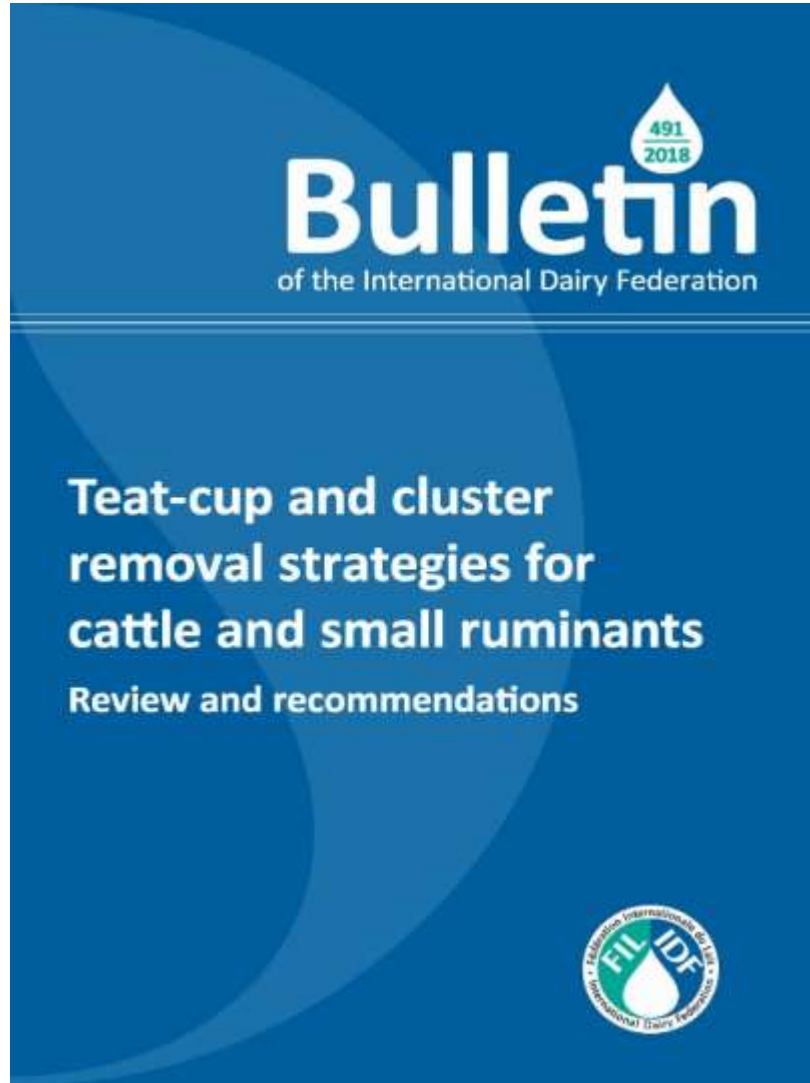
DOWNLOAD



Session 1: Sustainability  
Session 2: Sustainable milk production  
Session 3: Sustainable animal health strategies  
Session 4: Novel milk products & health impact  
Session 5a: Processing Technologies  
Session 5b: Processing Technologies  
Session 6: Quality and Safety  
Session 7a: Udder Health  
Session 7b: Udder Health

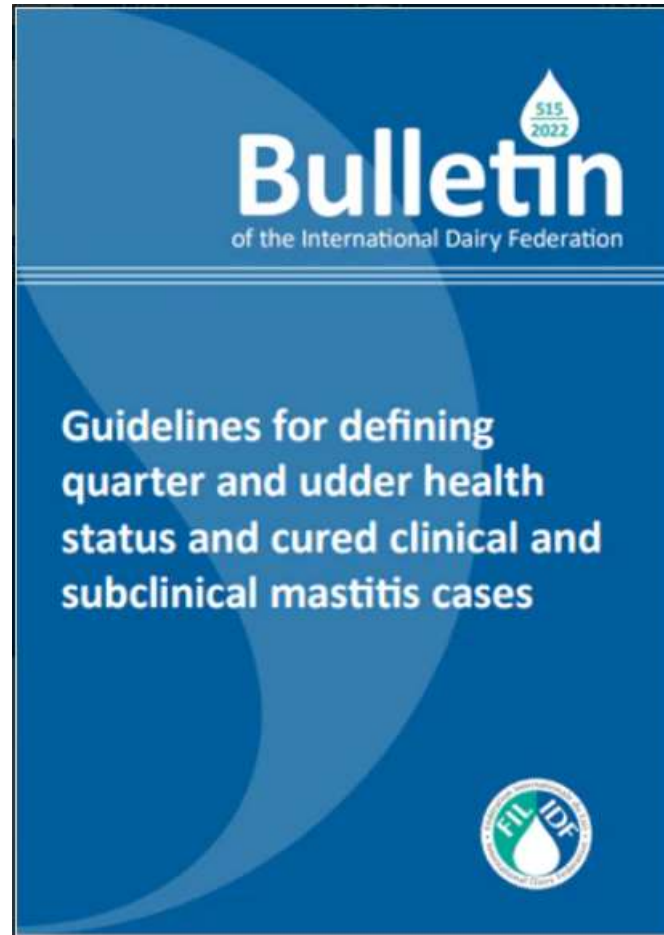
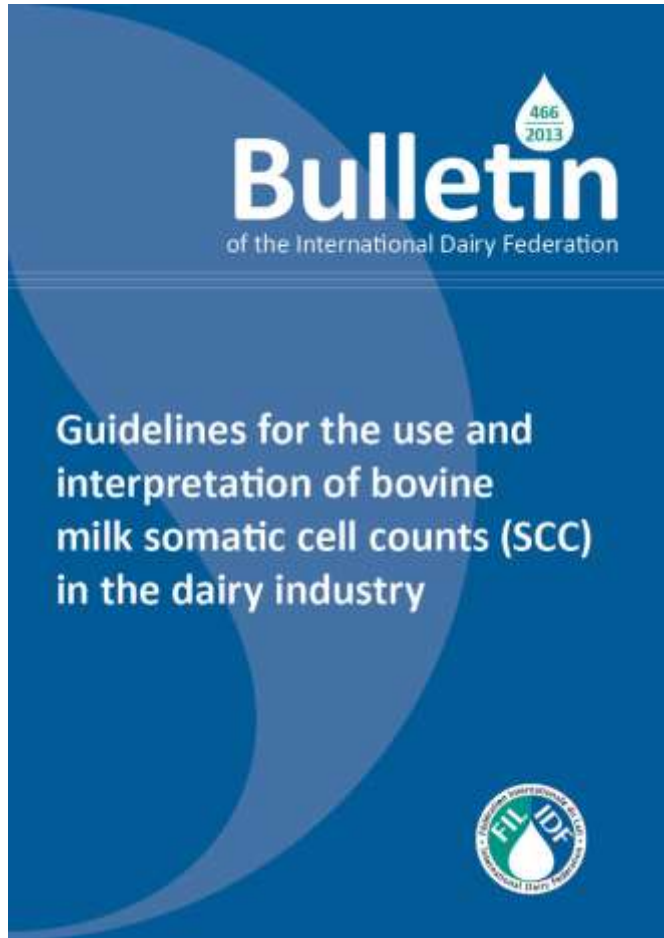


# IDF ADVOCATES FOR GOOD MILKING PRACTICES



**New ISO standard  
on milking and  
cooling machine  
installations**

# IDF DEFINES MASTITIS TERMINOLOGY

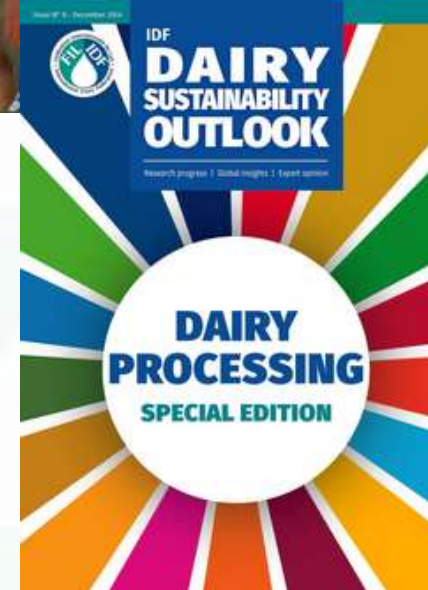
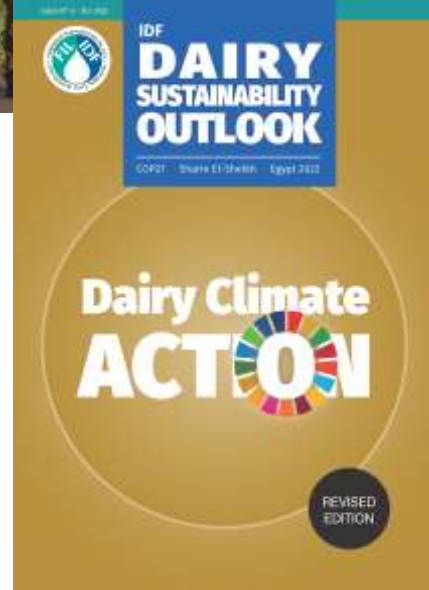
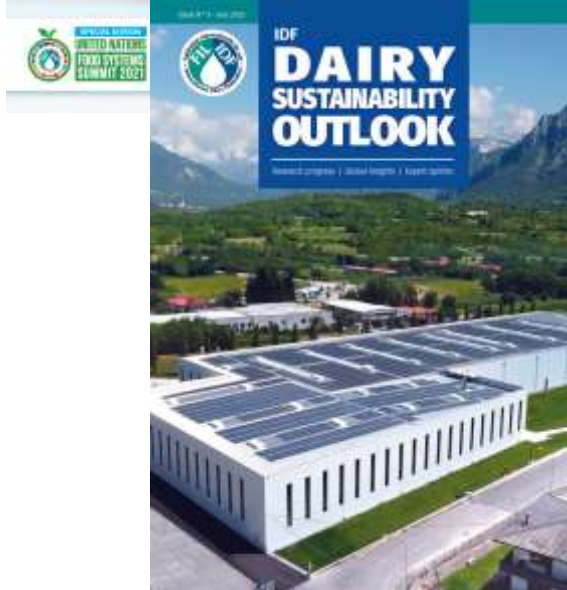
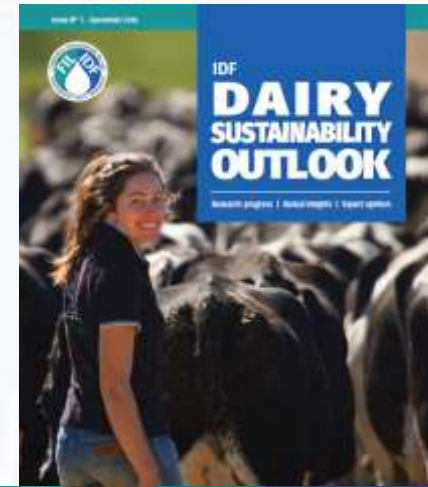
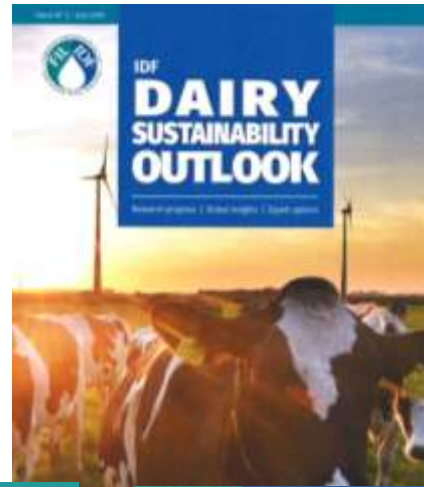
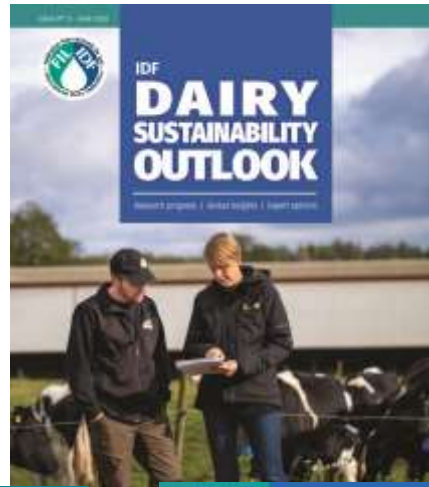
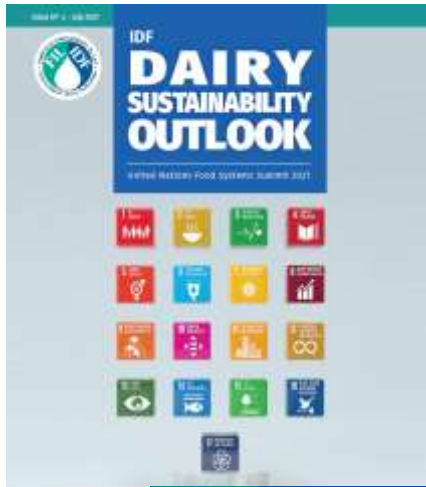


## IDF Bulletin 2025

Guidelines for  
interpretation of  
goat milk somatic  
cell count (SCC) in  
the dairy sector



# CASE STUDIES OF SUSTAINABLE PRACTICES & INNOVATIONS ACROSS THE DAIRY SECTOR

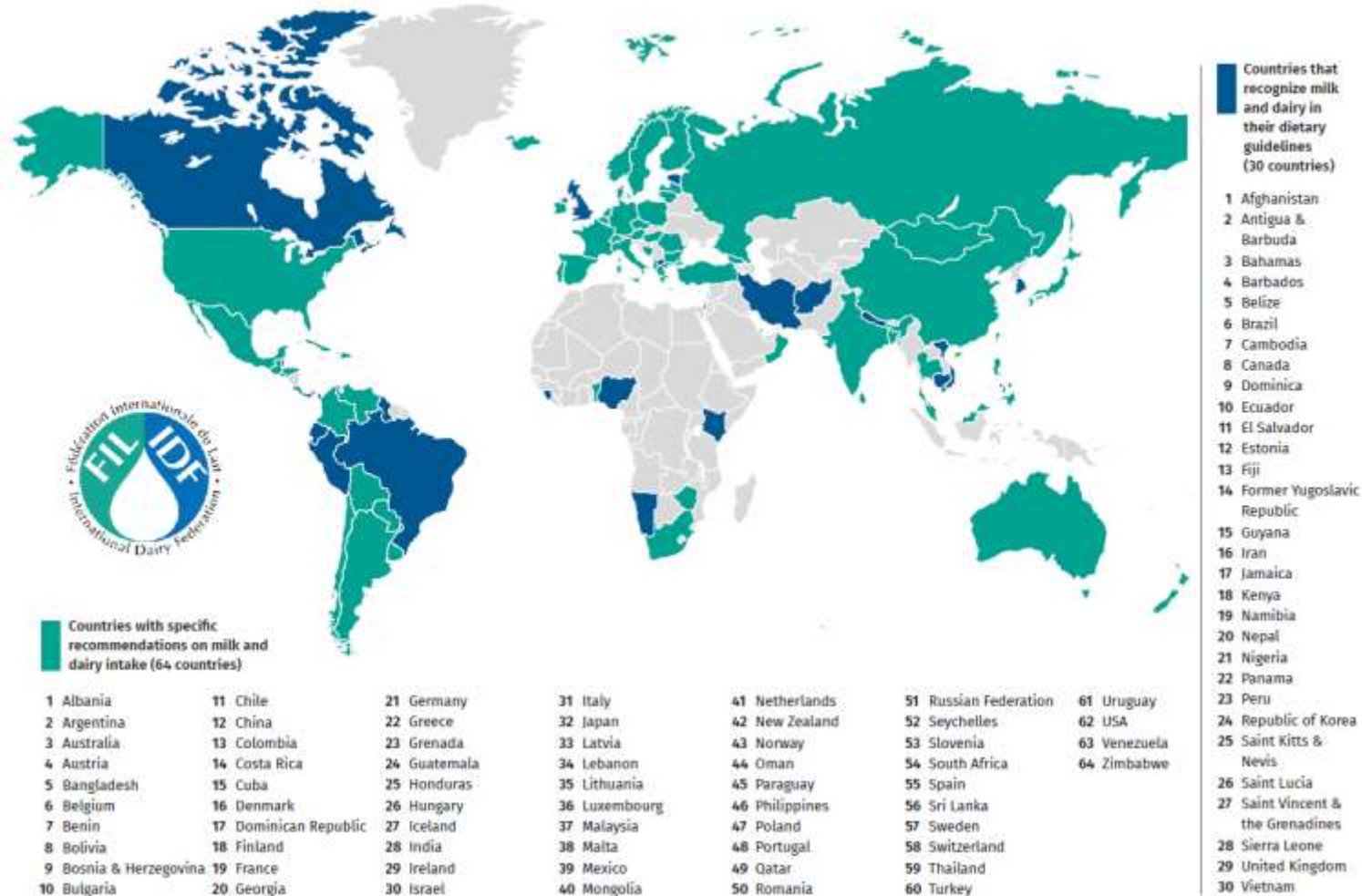




# DAIRY ACKNOWLEDGED IN DIETARY GUIDELINES AROUND THE WORLD



Schematic overview of dairy's place in dietary recommendations based on FAO's database (94 countries)





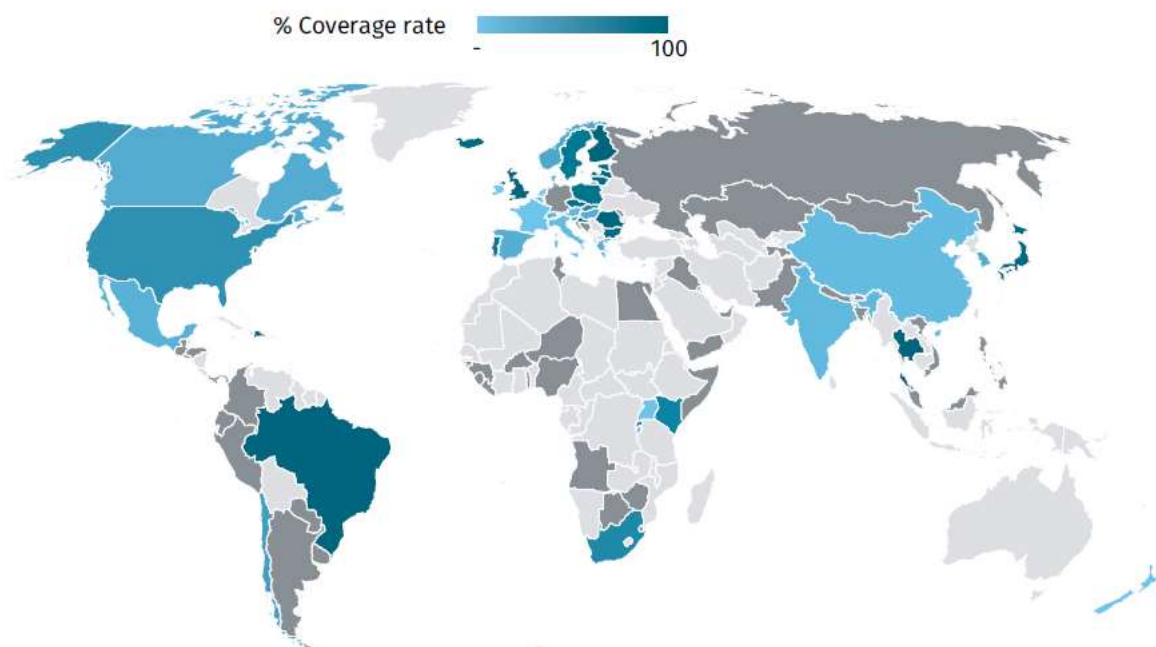
# IDF BULLETIN ON SCHOOL MILK



Over 210 million children in 104 countries benefit from milk and milk products within school programmes\*

Dairy foods are versatile and globally relevant

## Geographical Representation of School Milk Coverage



- ✓ Liquid milk (98%), yoghurt (48%) and cheese (32%) are the most commonly available dairy foods in school programmes
- ✓ Twice as much unflavored dairy foods provided, compared to flavored options
- ✓ Predominantly low-fat options, with whole and fat-free also available

*\*This analysis includes data from the IDF survey as well as data sourced from EU monitoring reports, the Global Child Nutrition Foundation, Tetra Pak, and other public sources.*



# PARIS DAIRY DECLARATION ON SUSTAINABILITY

- ✓ The dairy sector has shown strong commitment to sustainability
  - Global Dairy Agenda for Action (2009)
  - Dairy Sustainability Framework (2013)
  - Dairy Declaration of Rotterdam (2016)
  - Pathways to Dairy Net Zero (2021)
  - Global Methane Pledge (2022)
- ✓ The **Paris Dairy Declaration on Sustainability**, signed by IDF and FAO in October 2024, solidifies a global commitment to sustainable dairy development with **public, quantified, and time-tabled objectives**.
- ✓ IDF calls on all members, leaders, and stakeholders to **endorse the Paris Dairy Declaration on Sustainability** and commit to achieving its sustainability goals.





# IDF DAIRY INNOVATION AWARDS BUILT-IN SUSTAINABILITY AND UN SDG'S



# INTERNATIONAL DAIRY FEDERATION - WORLD DAIRY SUMMIT 2025



**IDF**  
**WORLD DAIRY**  
**SUMMIT 2025**  
**SANTIAGO • CHILE**  
**October 20 to 25**

# CONCLUSIONS

- The global dairy sector stands for major challenges as forecasts show an increase in demand, with variable increase in supply.
- Sustainability is not just about environmental stewardship but also involves ensuring economic viability and social equity. Pulling towards one of these dimensions will create trade offs.
- The global sector is an innovative and resilient sector. Through sharing knowledge, science and expertise we can leverage the vast potential that sits within it.
- Global challenges, local solutions
- At IDF there is some work on other mammalian species but underrepresented.



# ENGAGE WITH IDF!

## Expert recruitment

## How to become an IDF expert and contribute with your knowledge and work to the global dairy sector?

### 1 What is IDF and its contribution to global dairy?

International Dairy Federation (IDF) is the leading source of scientific and technical expertise for all stakeholders of the dairy chain. Since 1903, IDF's network of dairy experts has provided science-based knowledge on how to help nourish the world with safe, nutritious and sustainable dairy products.

With over 1,200 highly qualified dairy experts from its approximately 40 member countries around the world, IDF represents nearly 75% of global milk production and provides a permanent source of authoritative information relevant to the dairy sector. With your input, we will be even more experts and contribute with more expertise.

### Helping deliver a sustainable and successful future for the global dairy sector

- **IDF's Purpose:** To connect and empower the global dairy sector to nourish the world with safe, nutritious, and sustainable dairy.
- **IDF's vision:** Supporting the efforts of the global dairy sector to provide safe, nutritious, sustainable and accessible dairy products to the world's population while being a source of economic and social vitality in agricultural communities and the dairy sector.
- **IDF's mission:** Strengthen the global dairy sector by collecting, extending, managing and sharing science-based dairy expertise and insight for policy development and standard setting at national and international level.
- **IDF's values:** Knowledgeable, Collaborative, Excellent, Longstanding Integrity, Engaged



Our priorities are to:

- Show how milk and dairy foods are delivering on the UN Sustainable Development Goals and help dairy farmers, processors and other members of the global dairy chain to engage in sustainable practices
- Ensure dairy is recognised as an essential component in sustainable food systems and healthy diets
- Contribute to vital standard setting and scientific advice to intergovernmental organisations
- Remain a global forum for knowledge and experience sharing

#### IDF pillars

##### Standards

IDF contributes to the development of science based globally harmonized standards, guidelines, codes of practice and related methodologies across all working areas, to continually improve regulatory environments for the dairy sector.

##### Nutrition & Health

IDF pro-actively supports science-based nutrition policies to ensure that dairy is an integral part of the diet for all age groups and contributes to closing the nutritional gap.

##### Sustainability

IDF pro-actively supports a vibrant dairy sector committed to continuously improve its ability to provide safe and nutritious milk and dairy products from healthy animals to close the nutritional gap whilst preserving natural resources and ensuring decent livelihoods across the whole dairy value chain.

##### Safety & Quality

IDF engages in safeguarding the integrity and transparency of the dairy supply chain to ensure the safety and quality of milk and dairy products.



## Expert recruitment

### 2 How can experts contribute to IDF?

IDF is the strength of its network of 1200 dairy experts around the world working collaboratively to deliver our work. Our uniqueness is the participation of all actors of the value chain from farmers, processors, cooperatives, academics, researchers, dairy boards and organisations, government and policy makers.

Experts are expected to participate actively in the work items contributing to IDF programme of work within one or more of its 17 Standing Committees and Task Forces, according to their expertise, in alignment with their respective National Committees.

National Committee Secretaries nominate experts to the Standing Committees and Task Forces by sending a request with a CV/resume to the IDF Head Office. So if you are interested in becoming one of IDF's experts, get in contact with your country's national committee.

### 3 How would you benefit as an expert?

As an IDF expert, you will have the opportunity to make a difference in the global dairy sector. You will have the chance to impact the way the sector is progressing. You will also be part of a global network and get game-changing opportunities and add value to the IDF mission and programme of work.

At the same time, you will be able to learn and increase your professional profile and development, grow in your career and also become a mentor for others. IDF is a platform where you can provide solutions to a gap or a problem within the dairy sector. You will also have more opportunities to publish and be cited, to be invited as a speaker in summits, conferences and seminars, and be interviewed and consulted by the media. As chair and deputy chair, you will coordinate groups and influence on what work the group engages in.

IDF value for experts

- One-of-a-kind networking opportunities
- Make a difference
- Access to an unrivalled source of scientific and technical knowledge
- Coverage and understanding of dairy-related issues
- Participation in relevant working groups
- Analysis of key issues of interest for the dairy sector
- Contribution to the setting of international standards
- Key contacts
- Opportunities to bring a solution to a problem or a challenge
- Lead work or working groups
- Peer [recognition](#)

How much time would be expected from experts? Invested time will differ depending on how much experts commit to their tasks. However, it is worth mentioning that satisfaction of contributing to the development of the global dairy sector will be proportional to the time invested.

If you are interested to contribute to IDF work as an expert, please contact the [IDF National Committee in your country](#).

*"Joining IDF as an expert is an unparalleled opportunity for those who want to follow a career in the global dairy sector. I started my journey as an IDF expert in 2006, when I joined the IDF US National Committee as an expert and started to attend the first meetings. Then I participated as an IDF expert in the Codex meetings and soon attended my first IDF World Dairy Summit back in 2009. The next step was to chair the Animal Health and Welfare Committee. Fifteen years after, I am the chairing the Science and Programme Coordination Committee, which oversees all IDF's scientific work. It's been an extraordinary experience which I recommend to anyone who wants to leave its mark and impact the dairy sector at a global level."*

**Jamie Jonker, Science and Programme Coordination Committee Chair.**

If you decide to become an IDF member, we will provide you with full guidance and support, including and IDF expert guidelines with all the information you require to perform your duty.

## Join us!





# GLOBAL DAIRY EXPERTISE SINCE 1903

## INTERNATIONAL DAIRY FEDERATION

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1030 Brussels - Belgium

Tel: +32 2 325 67 40

Email: [info@fil-idf.org](mailto:info@fil-idf.org)

