
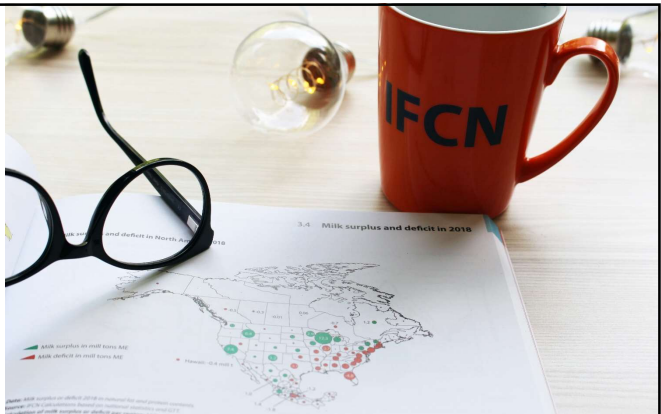


IFCN
Dairy Data - Knowledge - Inspiration

Presentation from



Dr. Torsten Hemme
Founder of IFCN & Chairman of the Advisory Board
torsten.hemme@ifcndairy.org




Global Dairy Trends, Drivers and Perspectives


May 2024 for Dairy Olympics in Ankara, Turkey

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Dairy Data - Knowledge - Inspiration



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The IFCN Dairy Network in 2024



Mission: We help people in the dairy world to make better decisions.

IFCN Approach: 3 Knowledge Pillars

- > 100 countries: Network of researchers from over 100 countries
- > 130 companies: Network of 130+ dairy-related companies
- 20 Dairy Experts in the IFCN Research Center in Kiel



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>130 Dairy related companies use IFCN for better business planning



Milk Processing UFA Dairy Farmers of America, Fonterra, LACTALIS, Arla, Nestlé, FrieslandCampina, Saputo, Amul, 蒙牛, DANONE, AGROPUR Dairy Cooperative, miller, dmk, SAVENCIA RESEARCH & DAIRY, SODIAL UNION, LEP, Emi, Unilever, Mondelez, MILKMADE RESEARCH, Milcobel, TINE, Borden, Vreugdenhil, Hochland, Zoff, hochwald, Hilmar, DALE FARM, Lakeland, PINAR, KDD, Aurora DAIRIES, f-milk	Feed and Feed Additives Cargill, ab agr, dsm-firmenich, Altech, Phibro, LALLEMAND, Jostens, EVONIK, trouw nutrition, NOVUS, de heus, KEMIN, Nutribio, PERDUE, UBM, Berg & Schmitt, agvital, ADISSEO, INATEGA, AAB, Ferraroni, Leiber, iff, Danisco Animal Nutrition & Health, serval	Milk Processing and Packaging Technologies Tetra Pak, ELOPAK, FOSS
Milking and Barn Equipment GEA, DeLaval, Lely, BolMatic, milkrito InterPuls, VES-Artex, TOPCOOL, serap, animat, spinder, Holm & Laue	Health and Hygiene MSD Animal Health, Elanco, Ceava, Vetcoquinol, HIPRA, ECOLAB, kersia, CH. MANNEN, CALIER, HUVEPHARMA, UNIVET, Mileutis	Finance Institutions IFC International Finance Corporation, Rabobank, StoneX, VR Bank Nord eG
Farm Machinery JOHN DEERE, KRONE, KUHN, POTTINGER, FARESIN, WEIDEMANN	Genetics for Animals & Plants URUS, SEMEX, GENUS, S, cogent	Agriculture Technology Companies MADCAP, milc group, MooMe, TOPCON, nedap, smaxtec, MauMap
	Dairy Farming EKONIVA, 3KOHIBA, Land Milkerei, moon	Consulting and other Companies Kite, promar, Vion

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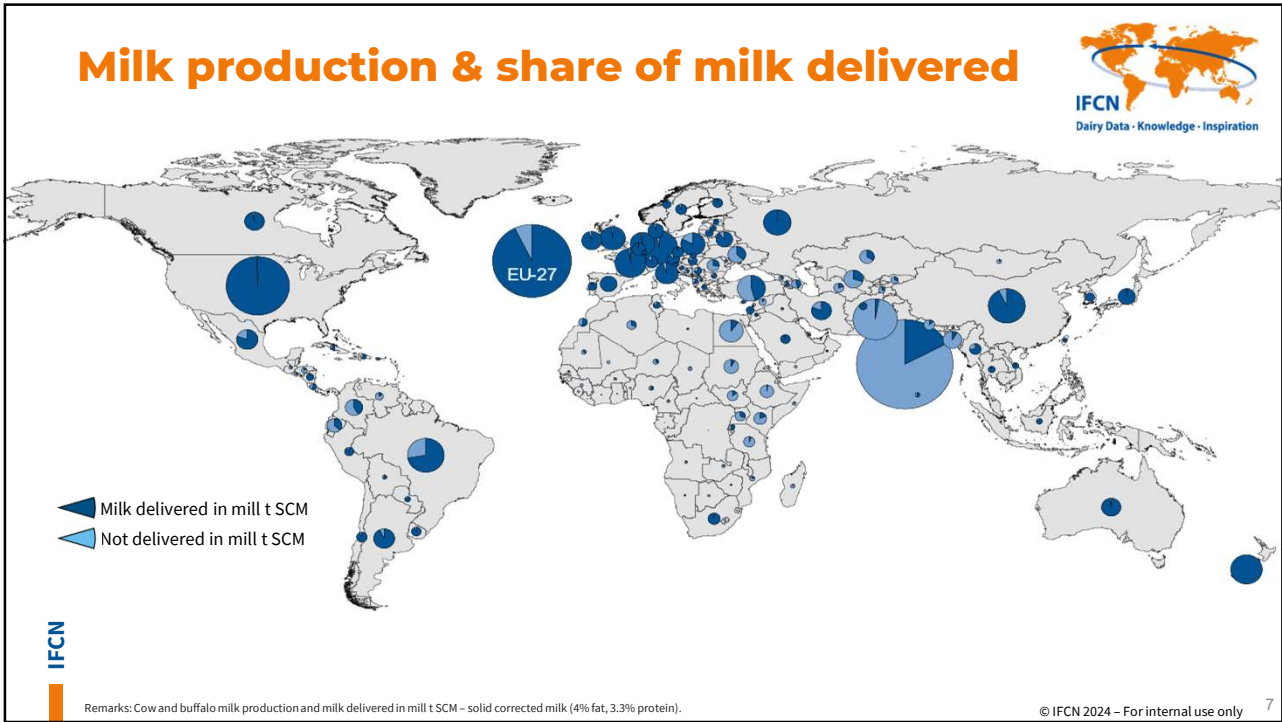
**A picture tells
more than 1000
words.**

**>40% of world
milk is
consumed on
farms or
delivered like
this**

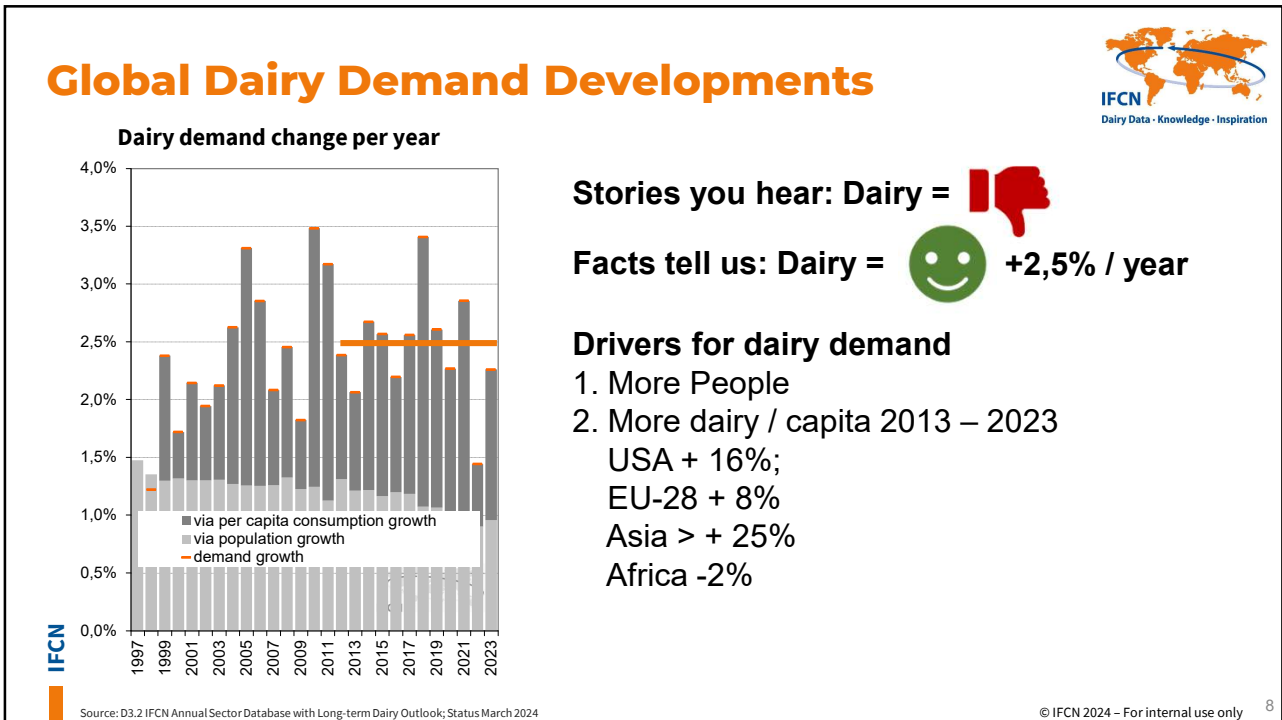


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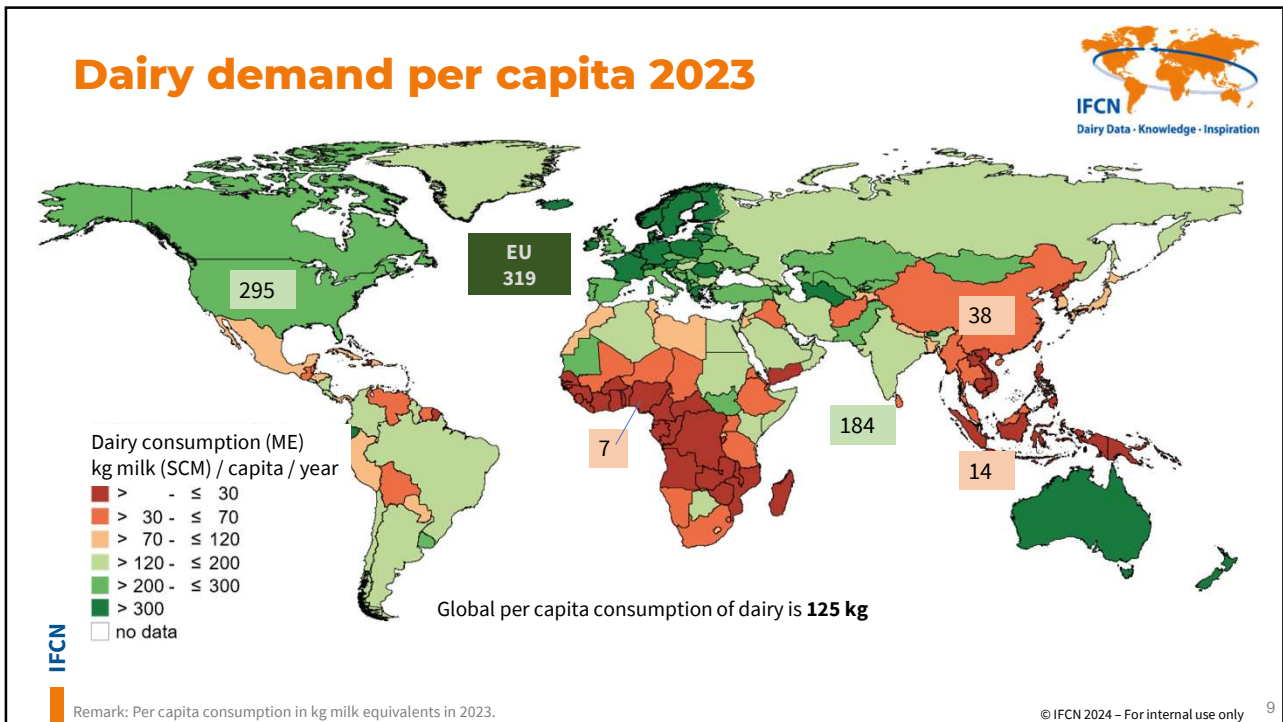
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Dairy alternatives - one of the threats?

Superbowl 2021
30 sec slot - 5.5 mill US\$

Its like milk but made for humans

No cows
No cows
No cows

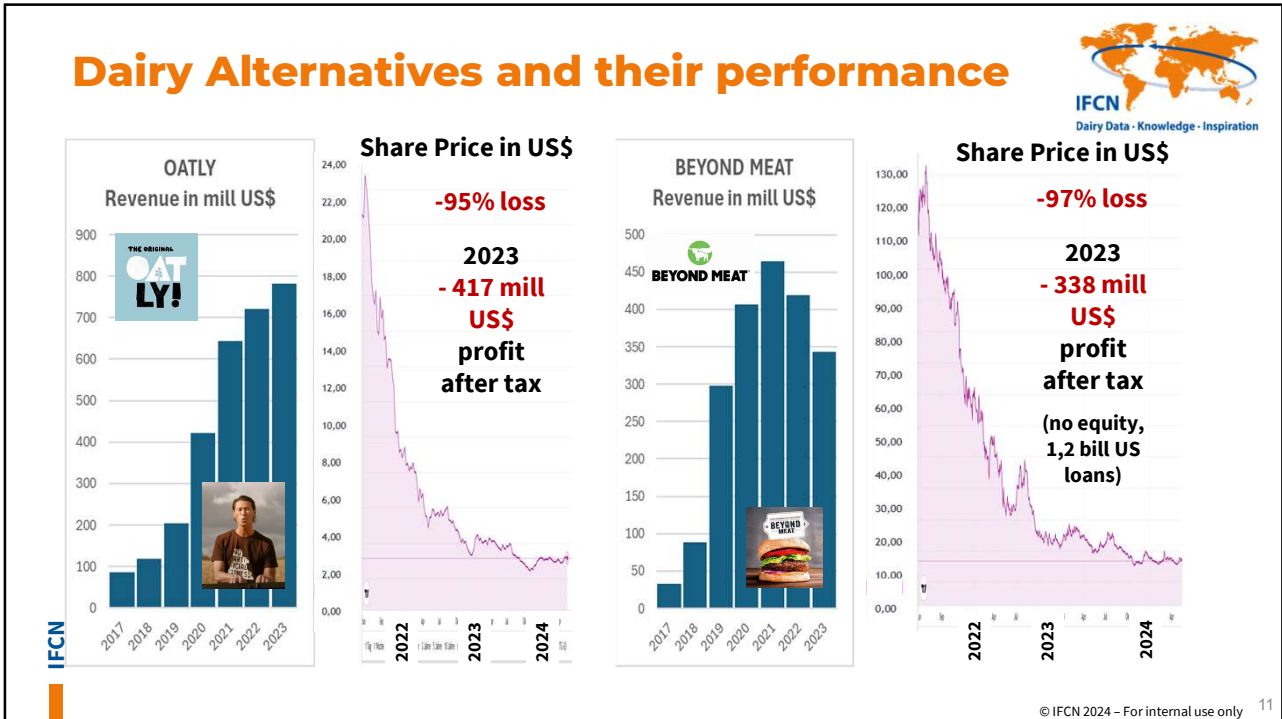
Oatly

Dairy & the Story
Loose, Loose, Loose
(Animals, People, Planet)

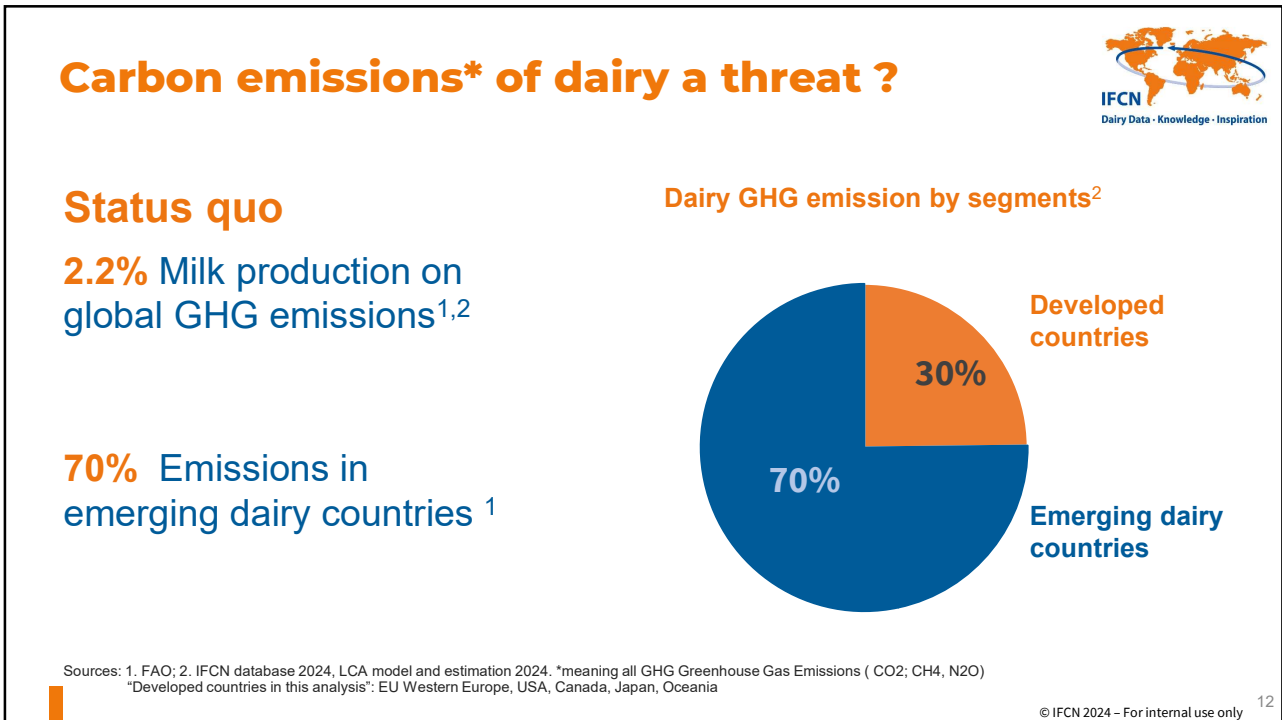
USA TODAY SPORTS

0:26 / 0:30

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A global initiative to solve carbon & dairy



WE SUPPORT PATHWAYS TO DAIRY NET ZERO.

We're helping to accelerate climate change action for dairy worldwide.

LEARN MORE AT WWW.PATHWAYSTODAIRYNETZERO.ORG



>100 Companies and organisations signed in

Driven by the global dairy sector and supported by leading scientific and research organizations.



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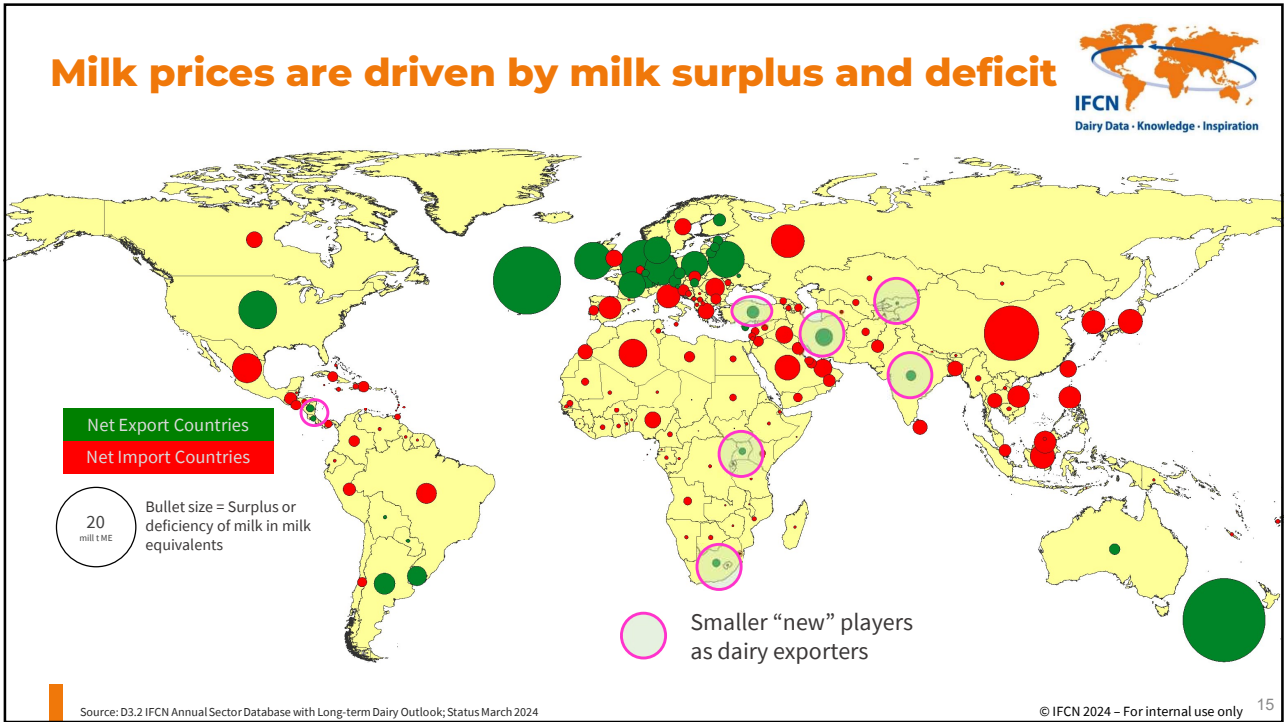
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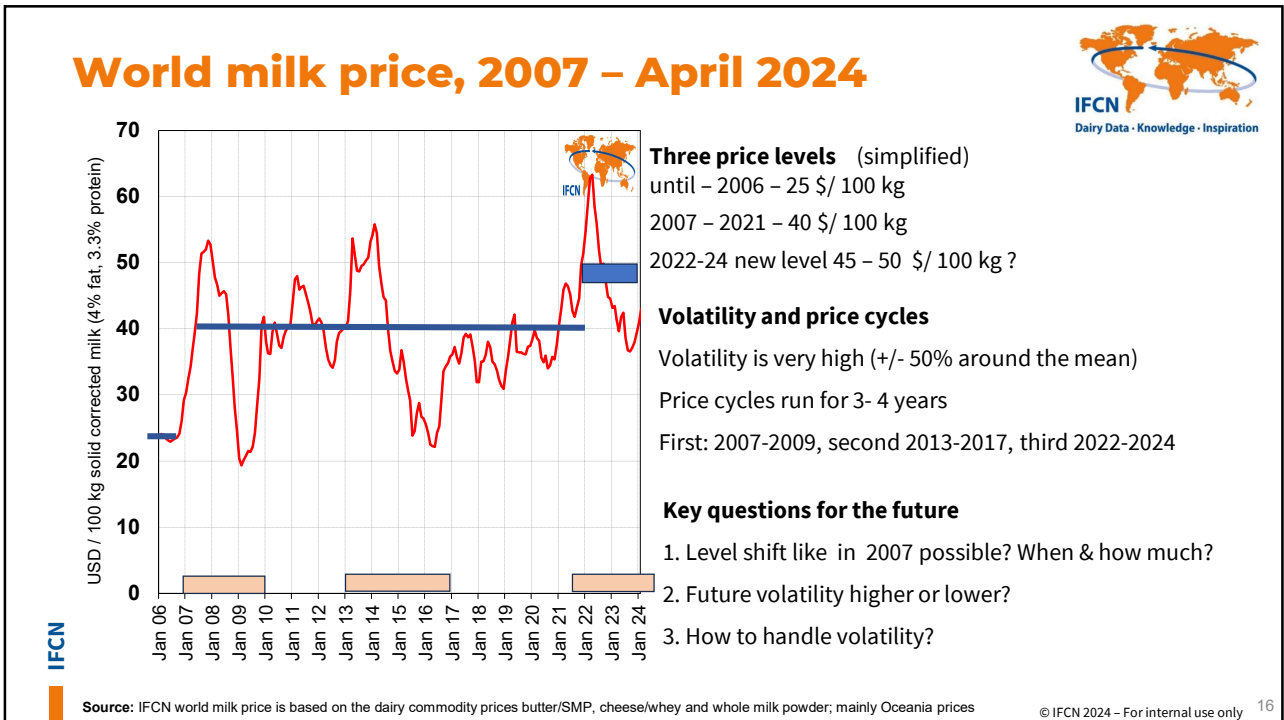
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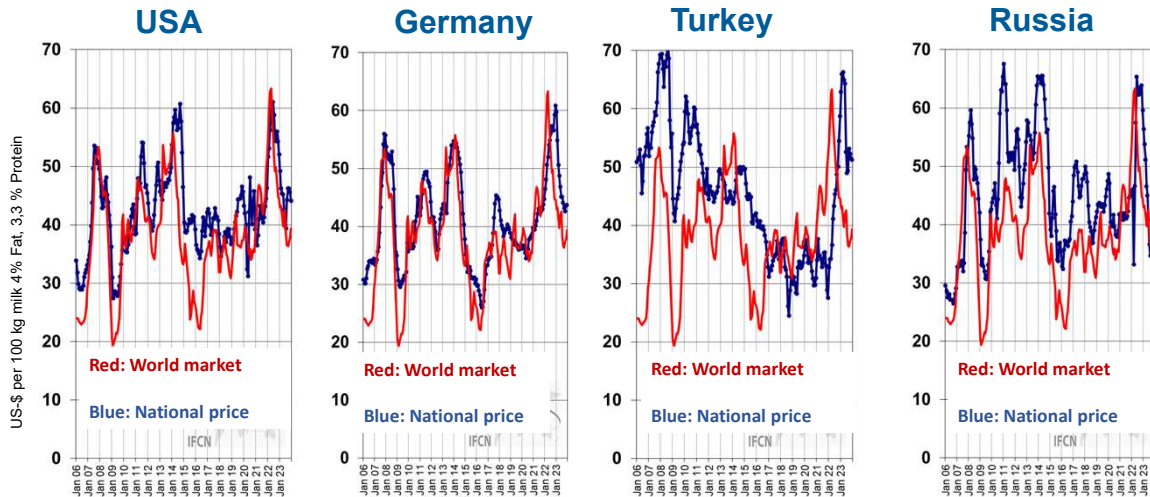


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World milk price drives national prices

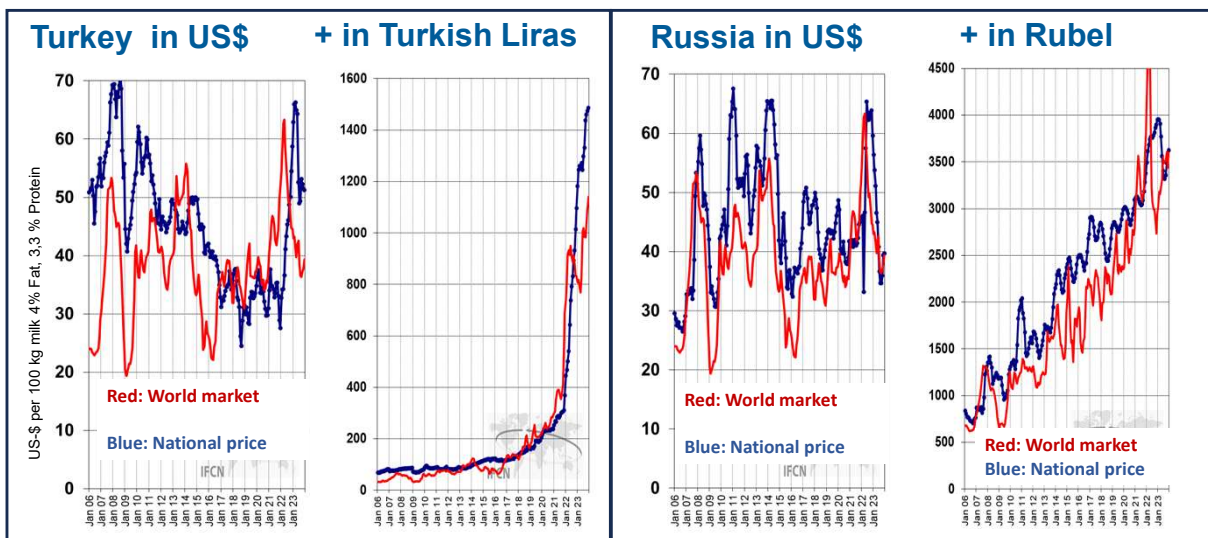


Source: IFCN Database 3.4: Monthly real-time database for 65 countries 2006 – Dec 2023

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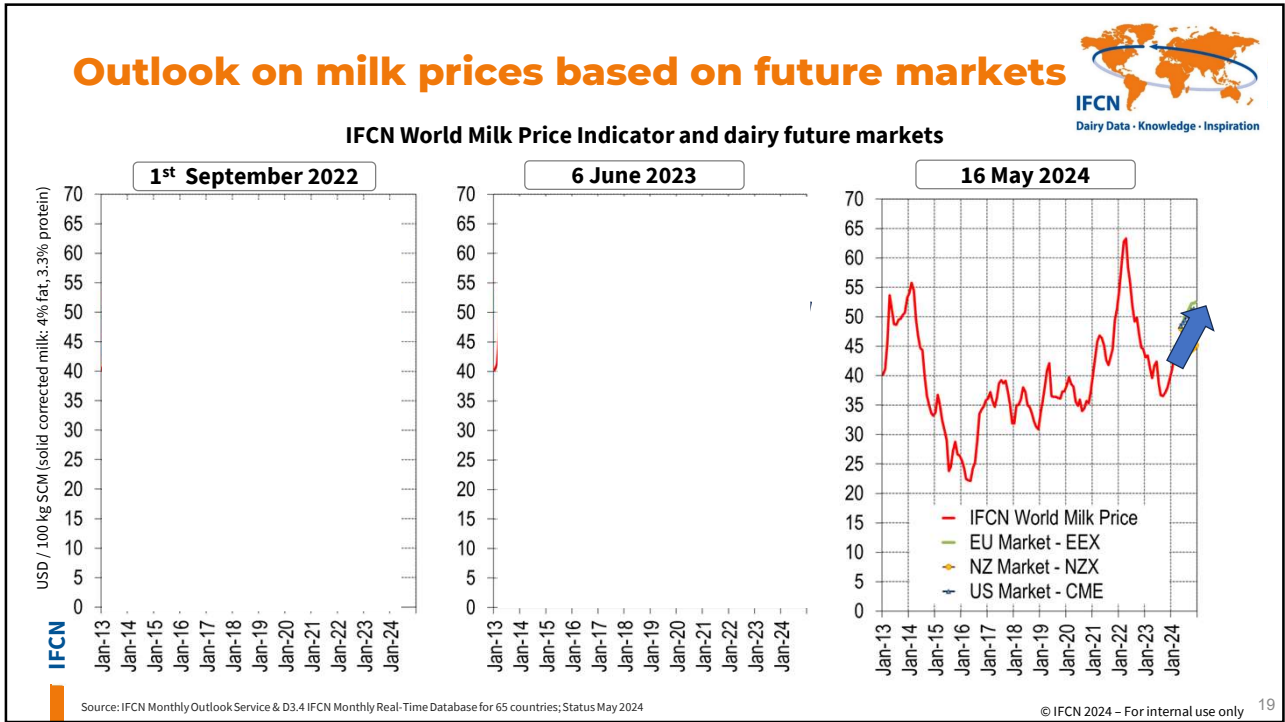
Milk prices in US\$ and national currency




Source: IFCN Database 3.4: Monthly real-time database for 65 countries 2006 – Dec 2023

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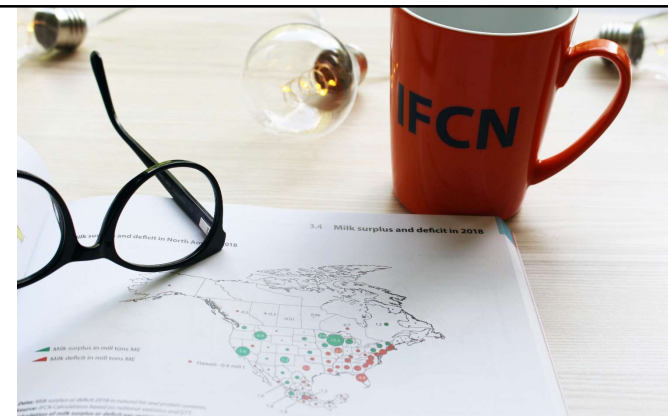
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Validation of IFCN Outlook from 2011

Past 1995	+ 15 years	Now 2010	+ 15 years	Future 2025
World population				
5,6 bn	+ 1,2 bn	6,8 bn	+ 1 bn	7,8 bn
World milk production				
530 mil t	+ 170 mil t	700 mil t	+200 mil t ?	900 mil t

What was predicted for 2025 we reached in 2021

(7,8 million people /> 900 mill t milk)

Presented 2011 at the IFCN Supporter Conference, France
(for cows & buffalo milk)

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Key Scenarios to Predict the Future

+ DEMAND Strong preferences for dairy products

INCOME RESTRICTED

PRO DAIRY

DEMAND / SUPPLY GROWTH
LIKE 2010 - 2020

IFCN SCENARIO

+ POLICY & ECONOMICS

„STAGNATION OR SHRINKING ?“


RICH AND PICKY

- DEMAND More dairy-free diets (+ less food waste)

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The Dairy World in 2050 vs 2020




9.6 billion people
+ 24% ; +2 bn


+41% more milk
produced and consumed
(+440 mill t milk SCM = 4,4x USA today; ca. 18x NZ)



300 mill dairy "cows"
-19%, -71 mill heads



143 kg "milk" consumed
+19%, +22 kg ME/capita



81 mill t ME traded*
+24%, +16 mill t ME

Dairy farms in 2050
60 million
Double the size and almost double the yield

* excl. EU-intra trade

IFCN outlook 3 / 2023 – Pro dairy scenario (People positive about dairy, good economic growth
5/27/2024 © IFCN 23

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My key messages for you today

2000-22 Golden years for dairy

+70% demand (400 mill t more milk = 4 times US today), + **60%** milk price level shift 2007



Even in golden times there where bumpy roads



2020 - 2050: Golden years for dairy ?

+ 40% dairy demand (440 mill t more milk = 4,4 times US today)

Feed price level shift 2021; +30 to 70%?

Milk price level shift 202X; x%



IFCN outlook 3 / 2023 – Pro dairy scenario (People positive about dairy, good economic growth 24

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