

Konkurrenzfähigkeit der deutschen Milchviehhalter im internationalen Vergleich



Agrarfinanztagung 2015
des Deutschen Bauernverbandes
und der Landwirtschaftlichen
Rentenbank – 4/ 2015

Dr. Torsten Hemme, Managing Director
IFCN Dairy Research Network at University Kiel,
Email: torsten.hemme@ifcndairy.org

Agenda

1. IFCN Methodik
2. Milchpreise
3. Kosten
4. IFCN Outlook 2024
5. Fazit



IFCN – steht für International Farm Comparison Network

IFCN ist ein **globales Netzwerk von Milchwissenschaftlern** und Unternehmen der Milchwirtschaft. Gegründet 1997

IFCN analysiert die **Milchproduktion** und weitere Themen wie Milchpreise und Wettbewerbsfähigkeit.

Das IFCN ist **unabhängig** und den folgenden Grundsätzen verpflichtet: Wahrheit, Wissenschaftlichkeit und Vertrauenswürdigkeit.

Wissenschaftler



IFCN Center
an der Uni Kiel



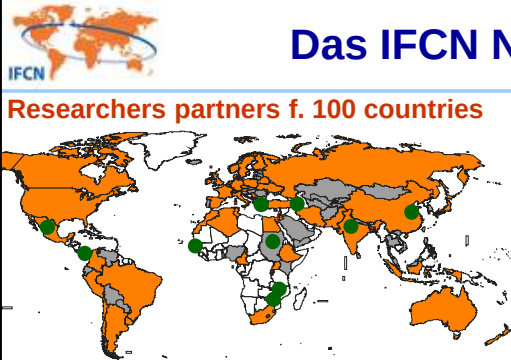
Firmen



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Das IFCN Netzwerk in 2015

Researchers partners f. 100 countries



■ Farm Comparison: 51 countries & 61 dairy regions
■ Country Profile: 100 countries (49 other than farm comparison)



Supporting partners (> 100)



IFCN has also partnerships with

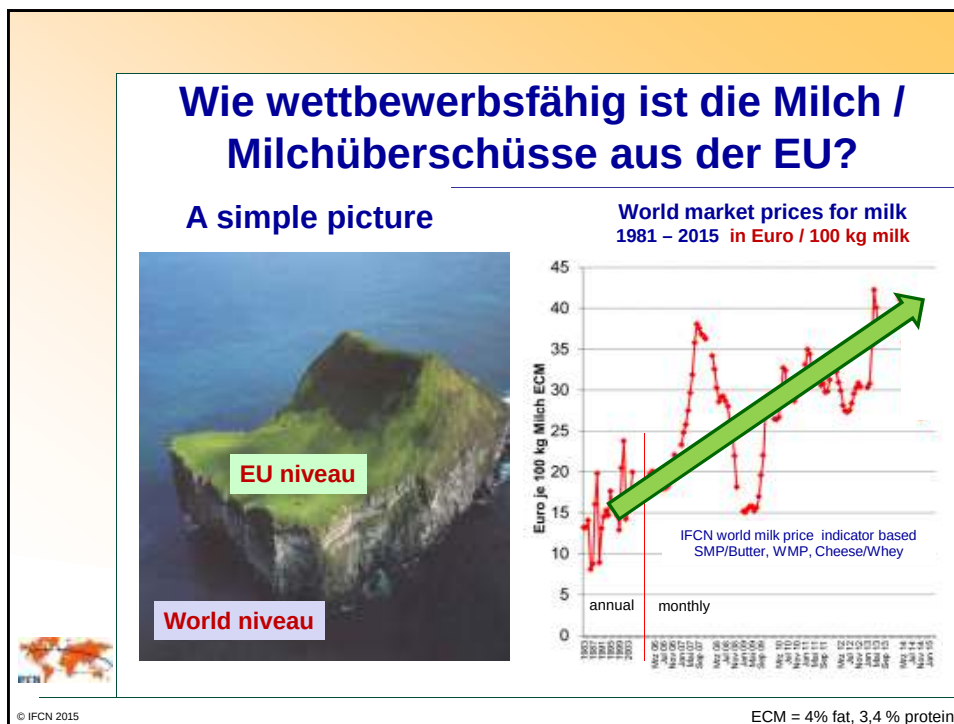
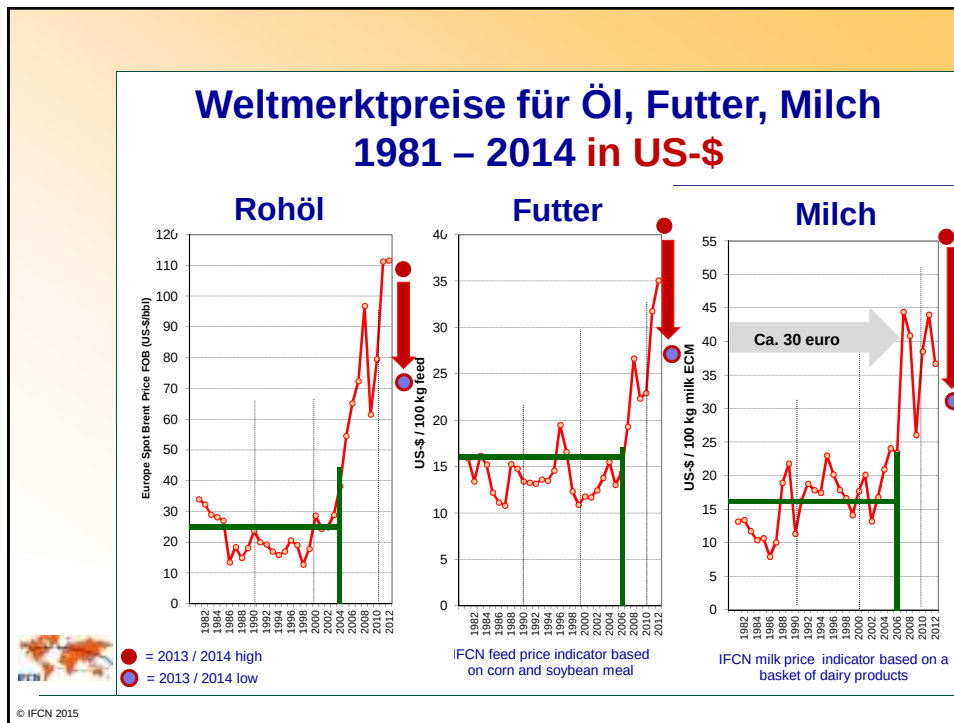


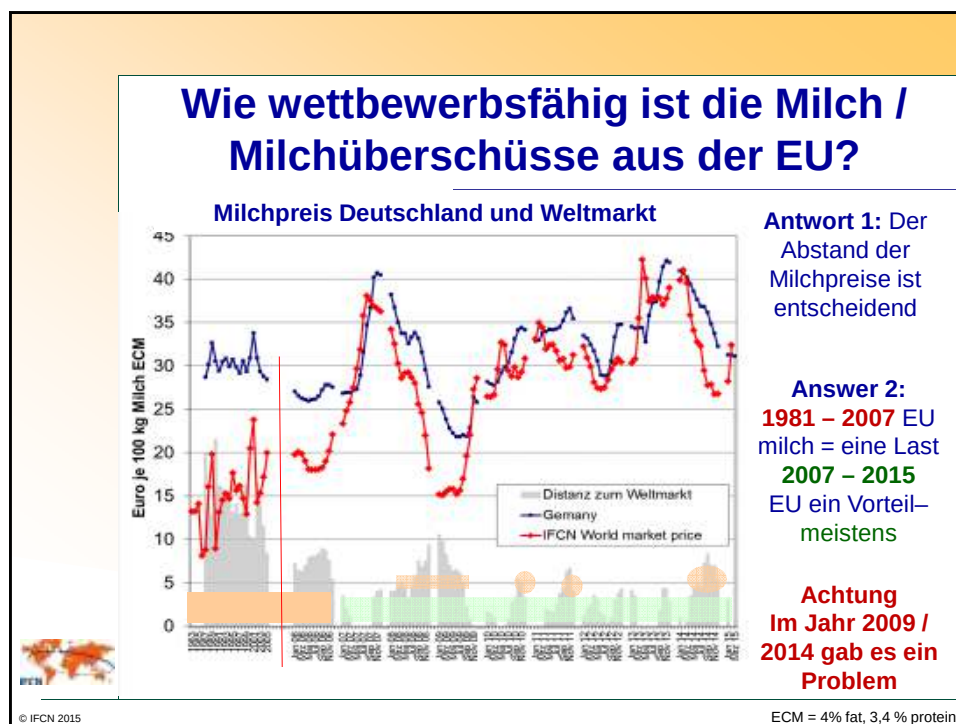
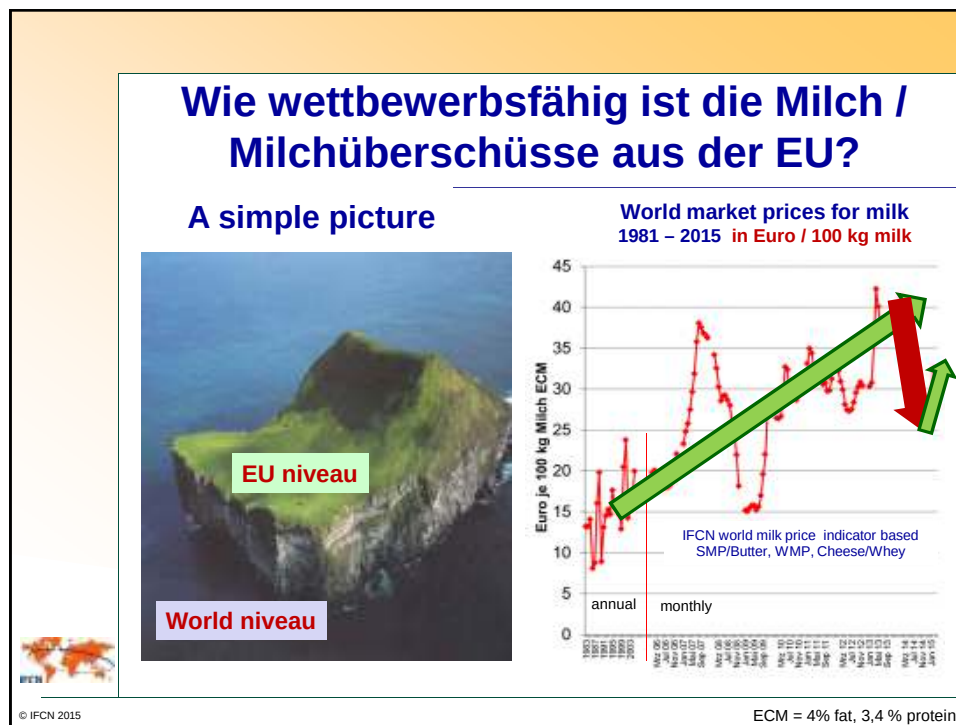


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Was treibt den Weltmarktpreis für Milch?

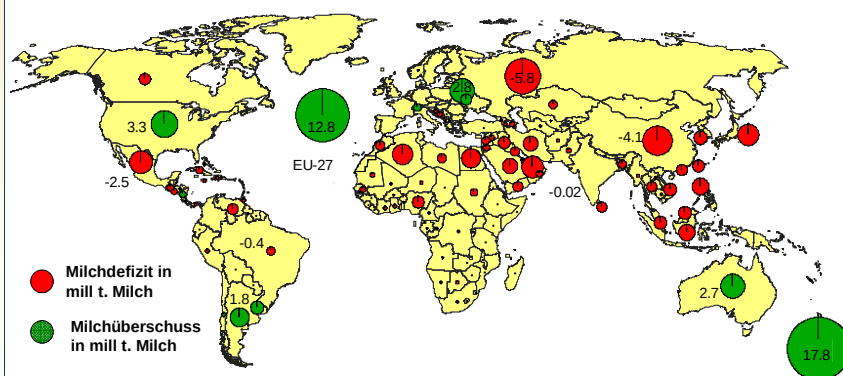
3. Antworten



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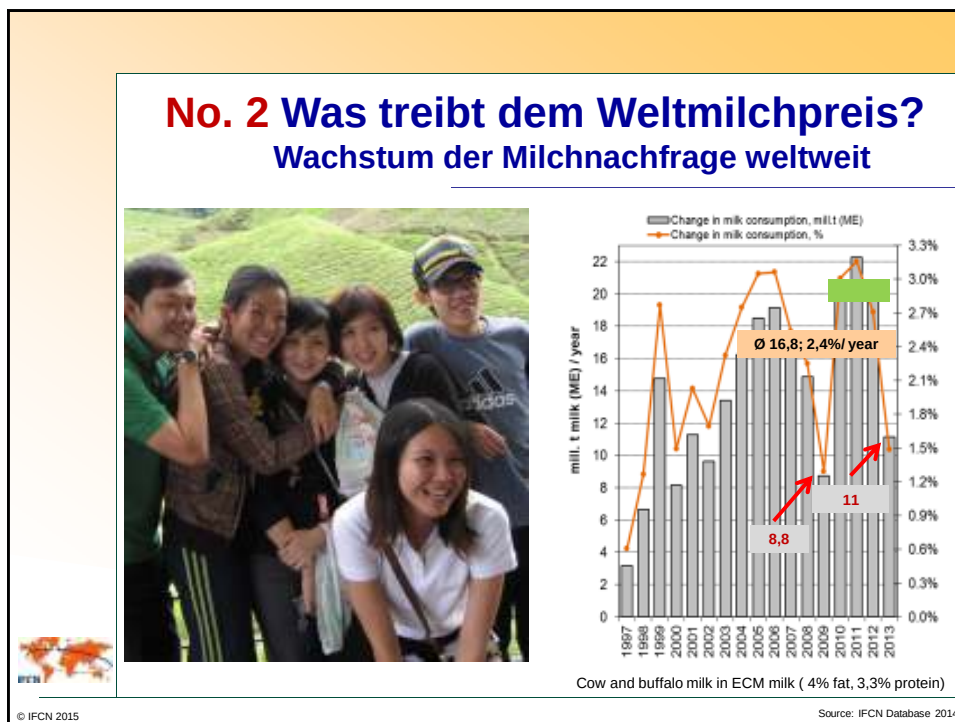
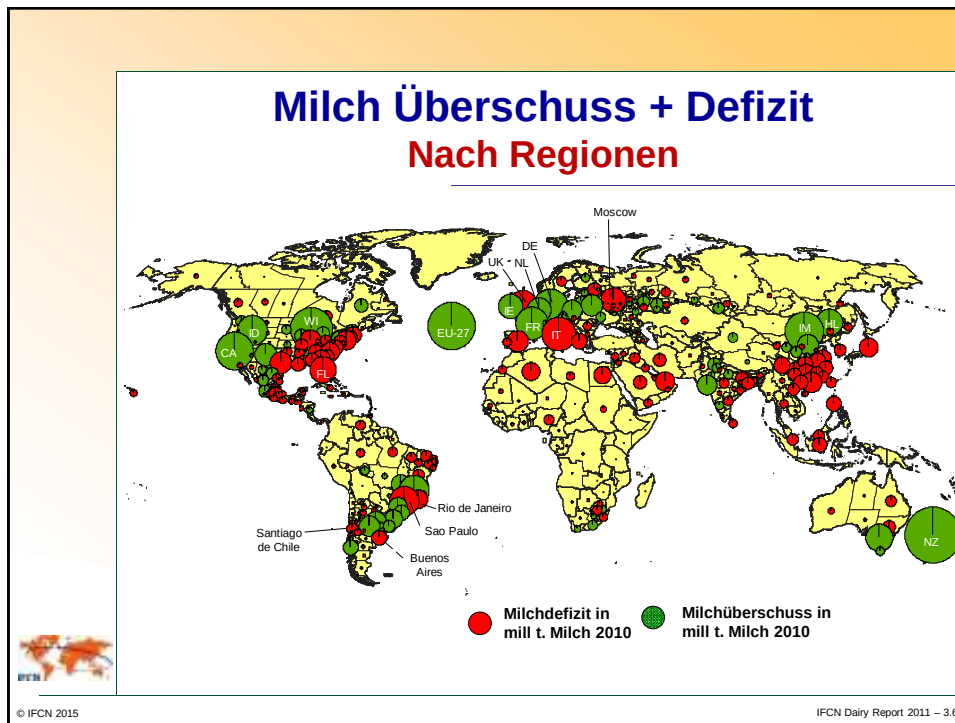
Source: IFCN Dairy Research Center

No. 1 Milch Überschuss + Defizit Nach Ländern

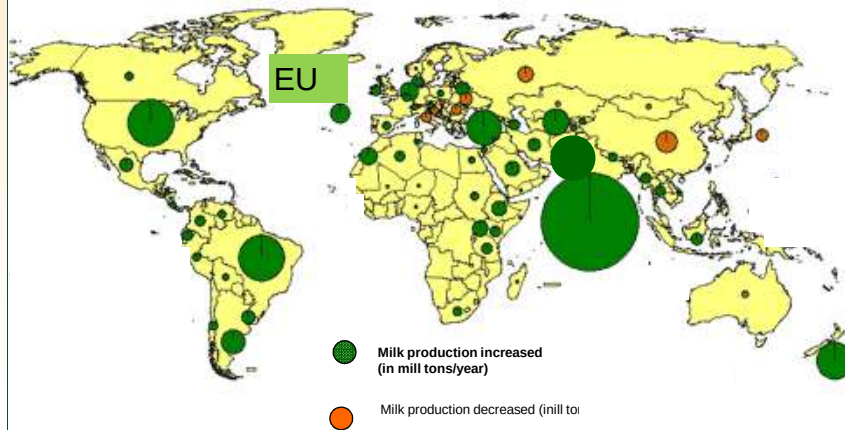


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Source: IFCN Dairy Research Center



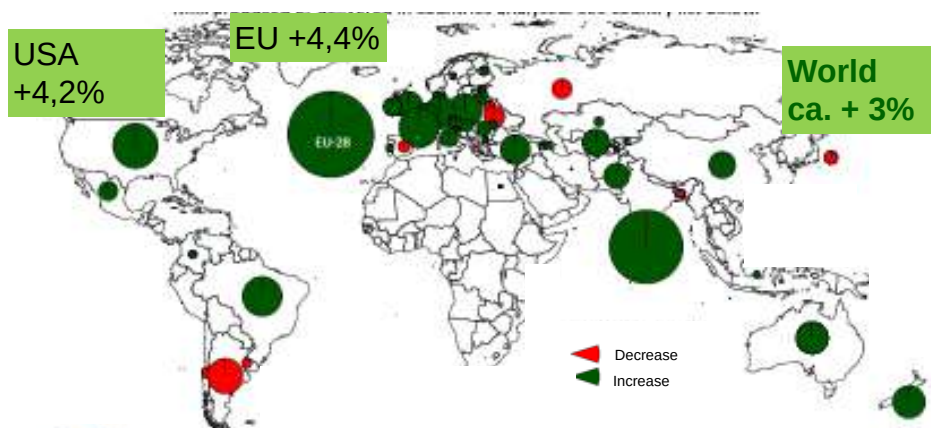
No. 2: Was treibt dem Weltmilchpreis? Wachstum der Milchmenge 2006 – 2013 / Jahr



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IFCN Dairy Report 2013 – estimates for the year 2013

World milk production – August 2014 vs. 2013

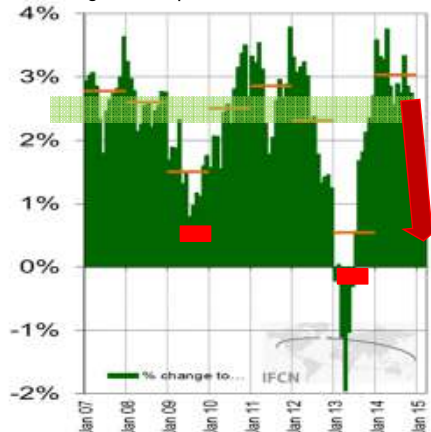


60 countries analysed (p = milk production, d = milk delivery): **EU-28:** (d), **CIS:** Armenia (p), Azerbaijan (p), Belarus (p), Kazakhstan (p), Kyrgyzstan (p), Moldova(p), Russia (p), Tajikistan (p), Ukraine (p), Uzbekistan (p).
USA & Canada: Canada (d), USA (p), **Latin America:** Argentina (p), Brazil (d), Chile (d), Colombia (d), Mexico (p), Peru (d), Uruguay (d), **Oceania:** Australia (p), New Zealand (p), **Asia:** Bangladesh (p), China (p), India (p), Indonesia (d), Japan (p), Pakistan (p), **Africa:** Egypt (d), South Africa (p). **Other:** Switzerland (d), Turkey (d), Iran (p). Countries included represent 92% of world milk production. Data is preliminary or estimated.

IFCN monatliche Milchproduktionsdaten

Daten f. 2007 – 3/ 2015; Dez- März - real time estimates

% change in milk production in the world



Key fact of this data base

1. 60 countries >90% world milk)
2. ECM corrected
(4% fat, 3,3%protein)
3. Leap year adjusted
4. Real time estimates
(1-3 month)
5. updates (mid of each month)

This database we offer as monthly service to support people doing market projections.



Explanation: Relative change of the 12-months rolling sum of milk production expresses the relative deviation of milk production in a 12 month period compared to the same period one year before. Countries included represent 92% of world milk production. Data is adjusted for leap year effect.

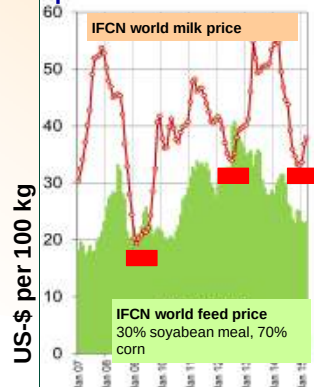
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Source: Data product - Monthly real time data of milk production, milk & feed prices, status 5/2014

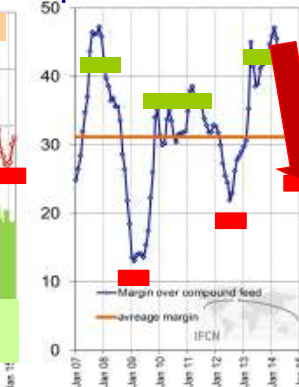
airry farm economics a key driver for milk supply growth

Data f. 2007 – 3/2015 estimates

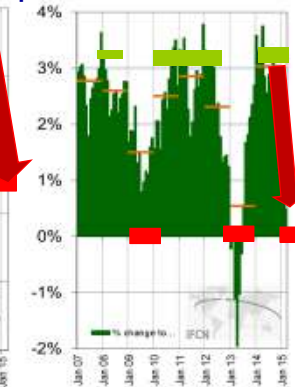
World milk and feed price



IFCN margin over compound feed costs



% change in milk production 60 countries



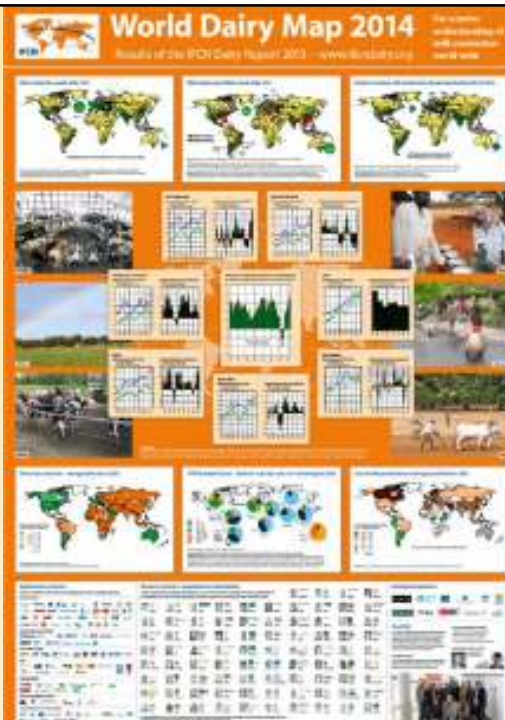
Explanation: Relative change of the 12-months rolling sum of milk production expresses the relative deviation of milk production in a 12 month period compared to the same period one year before. Countries included represent 92% of world milk production. Data is adjusted for leap year effect.

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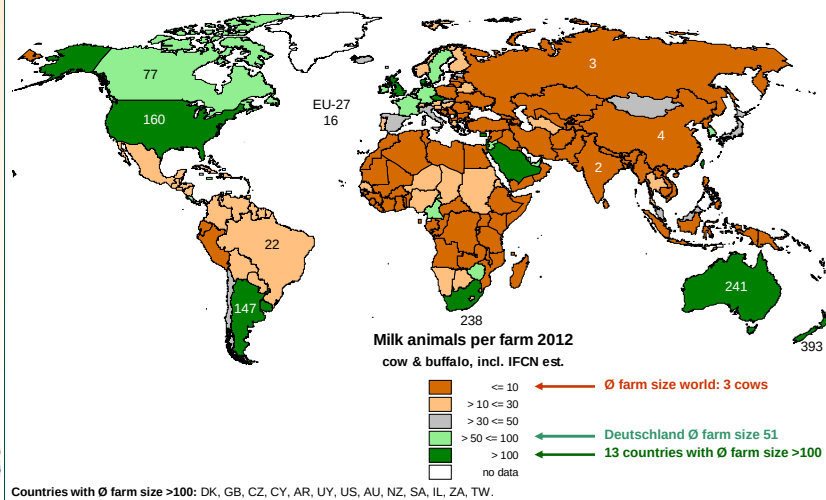
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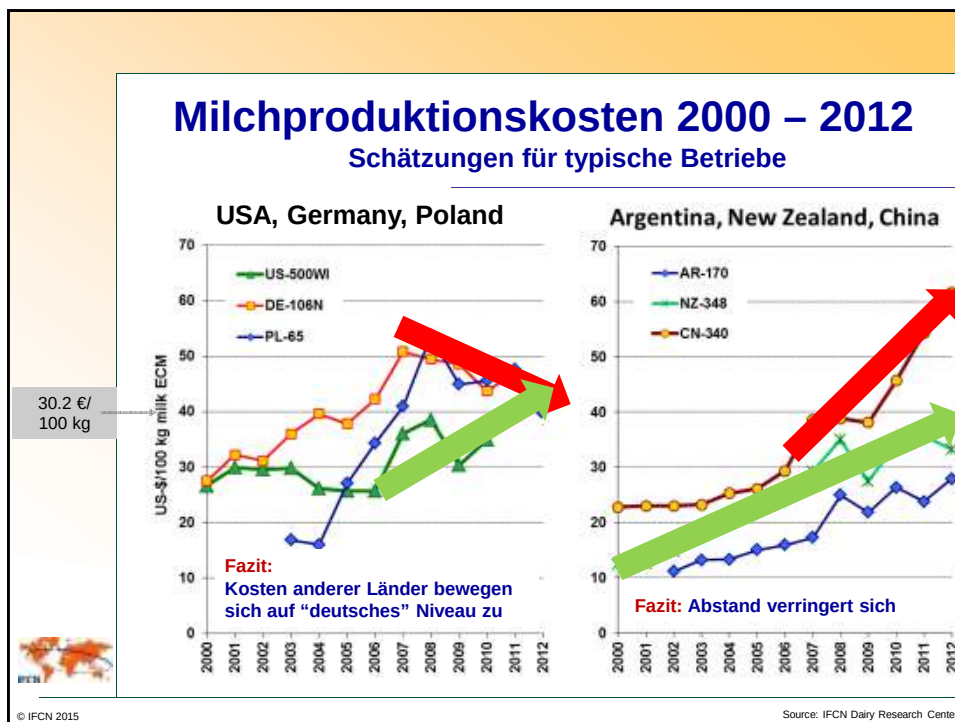
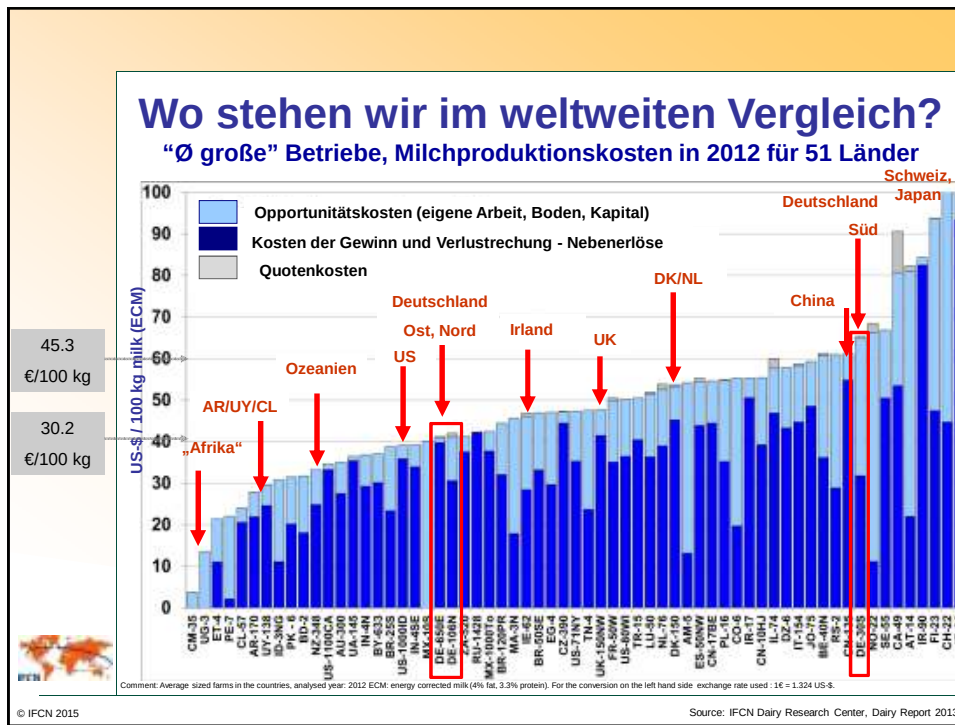
Struktur der Milchproduktion weltweit

Ø Betriebsgröße in 2012, Kühe und / oder Büffel pro Betrieb



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Sources: Dairy sector database product, IFCN Dairy Research Center

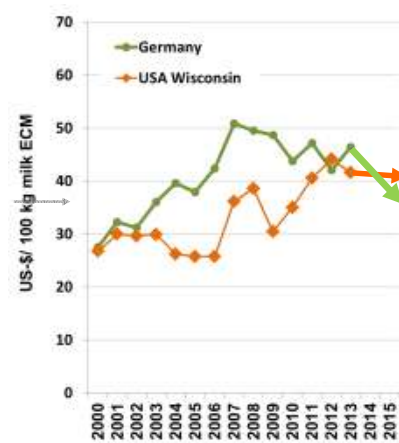


Produktionskosten Deutschland und USA 2000 – 2015 (Data for typical dairy farms (est. 2014/15))

Exchange rate US-\$/Euro



Cost of milk production



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Source: IFCN Dairy Research Center

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IFCN Global Dairy Outlook Methodische Schritte seit 2011

2011 1. Step **900 mill t**
in 2025 - qualitative work

There are 15 exciting years ahead of us

	Past 1985	+ 12 years Now 2015	+ 12 years Future 2025
Yardstick Horizon	36 years	45 years	68 years
World population	5.6 bn	+ 1.2 bn 6.8 bn	+ 1.5 bn 7.3 bn
World milk production	320 mill t	+ 170 mill t 490 mill t 60% from Asia esp. in China, Africa (+ 12% each)	+ 200 mill t 690 mill t

2013 2. Step: Quantitative work + mile stone in IFCN development
analysis and database for 1996 – 2023
globally consistent and comparable

2014 3. Step: Refine, improve and deepen feedback received
in 03/2014 new IFCN Baseline 2024

2015 4. Step: Improvement outlook 2015



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Country fact sheets 1996 - 2024

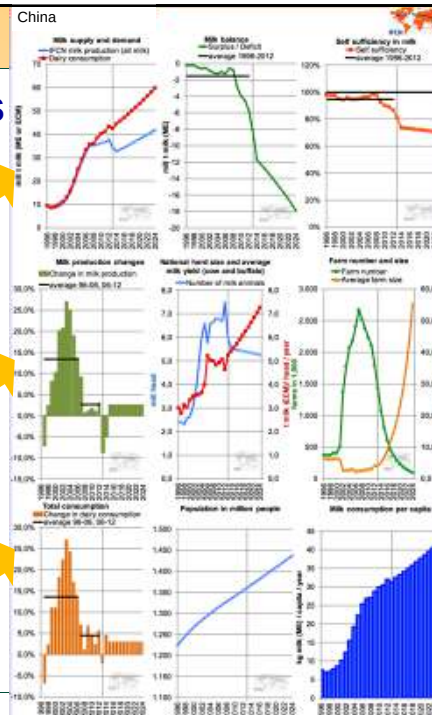
Supply & demand balance
Milk supply, demand,
Imports/export
Self sufficiency

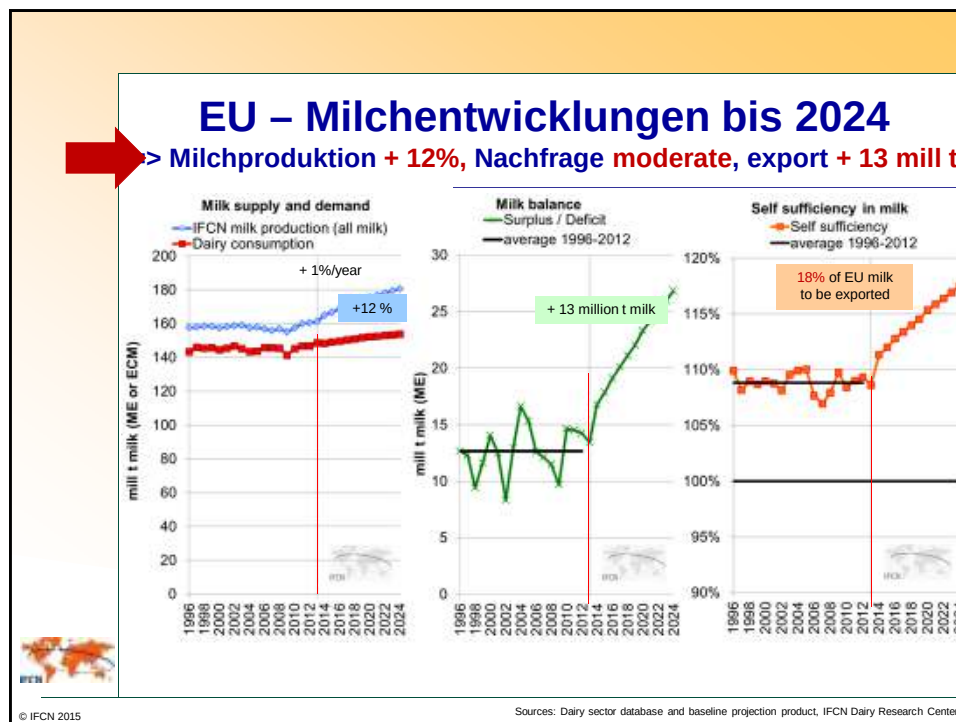
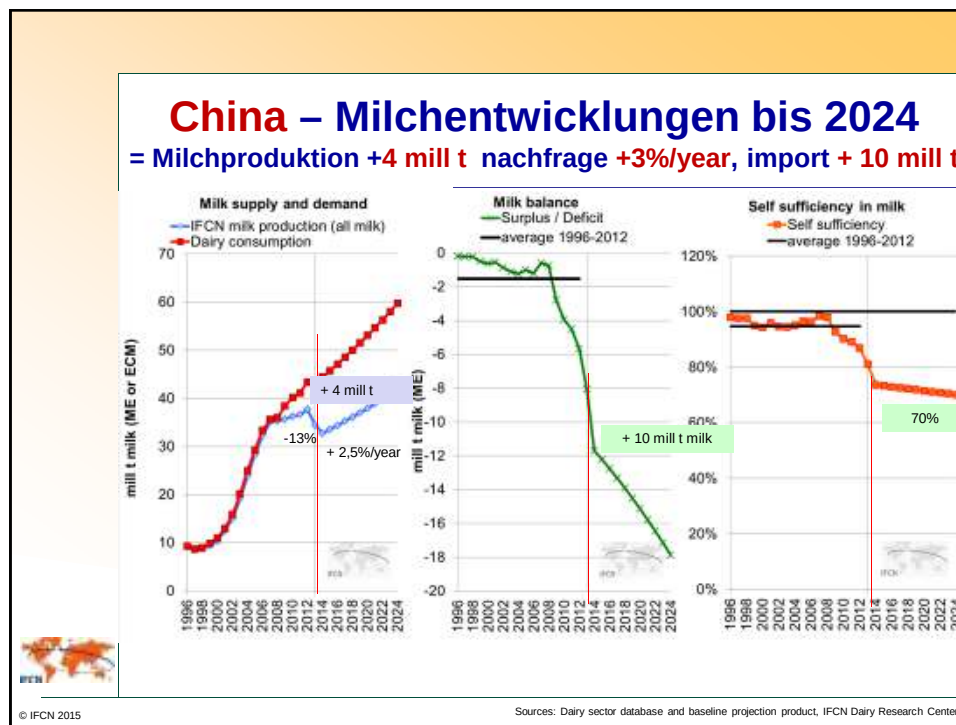
Milk supply details
% growth / year
Cows & milk yield
Farm number and size

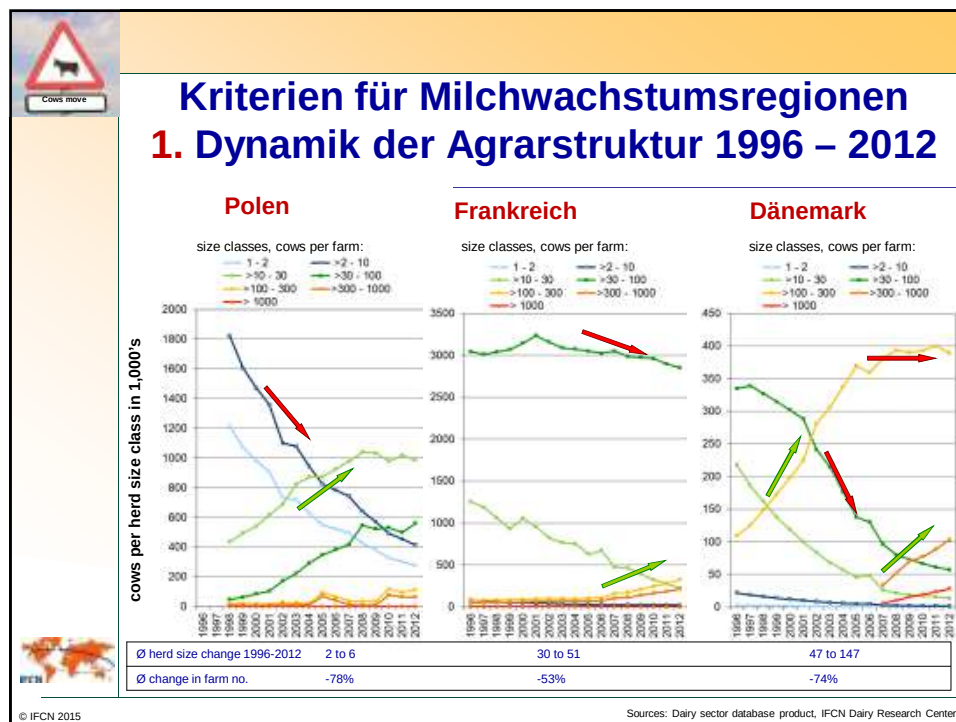
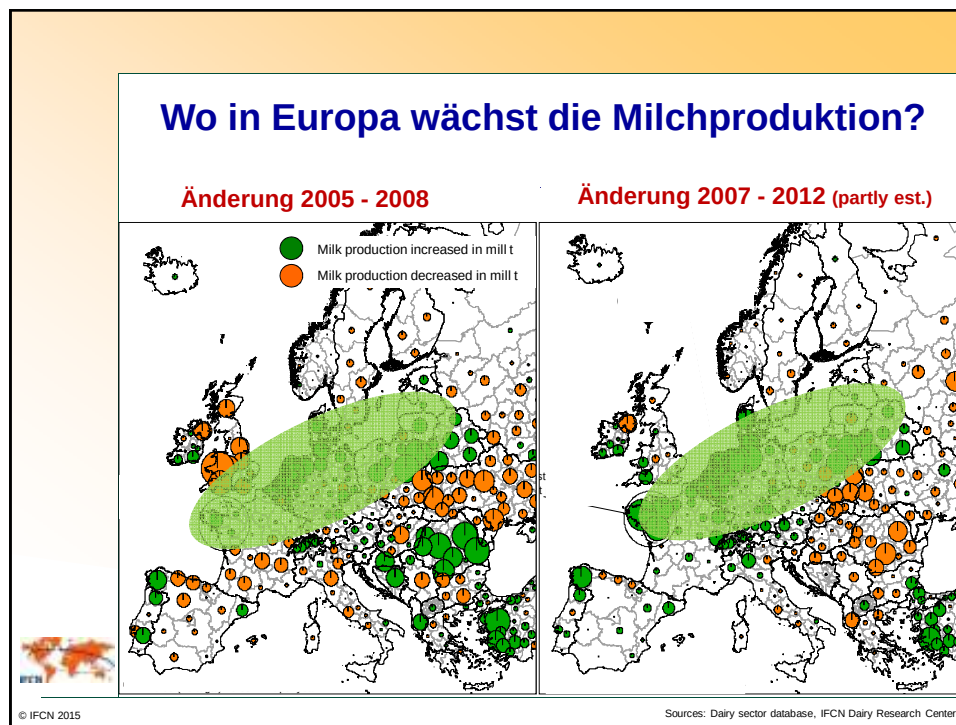
Milk demand details
% growth / year
Population
Per capita consumption



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Fazit

Nachfrage: Wir brauchen ca. 20 mill t mehr Milch/ Jahr

Milchangebot: Milchproduktion kann so schnell wachsen wenn Milch/Futterpreis passt, + Wetter + Politik

Milchpreisniveau: Ca. 45\$/ 34€ 100 kg (für das def. Futterpreisniveau)

Zukunft der Milchwirtschaft in der EU/Deutschland:

- Deutschland ist international wettbewerbsfähig (generell)
- EU = Weltmilchexporteur No.1 in 2024 ?
- **Wettbewerbsfähigkeit** der Milchproduktion ist eine Herausforderung überall auf der Welt !!!!
- **Volatilität** von Milch/Futterpreis sind eine Herausforderung überall auf der Welt.



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Source: IFCN Dairy Research Center

This presentation
is the result of
a large number of people
working together
since 2000



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Network of researchers



Network of companies



Dairy Research Center

