



Productschap
Zuivel



Land- en Tuinbouworganisatie Nederland



EDF Congres

Saluzzo (Italy) June 25th 2010

Willem Koops

***LTO International comparison
of producer prices for milk***

2009



*prezzi di latte • melkprijzen • prix du lait • molkeprizen
milch preise • milk prices • maelke priser • maidon hinnat*



Introduction of the project

- Initiated by the dairy farmers of LTO Nederland, start 2000
- Reason: No good market indicator available
- Objective: Market transparency
- Result: Comparison of prices for standard milk
 - MONTHLY
 - ANNUAL
- Realised by PZ in co-operation with EDF

Basic assumptions

- Euro/100 kg
- Ex farm, VAT excluded
- 1 litre = 1.03 kg
- True Protein = 0.95 Crude Protein (France)
- Method:
 - Copies of monthly milk statements from EDF farmers
 - Model of payment
- Standards:
 - 4.20 % fat and 3.40 % (crude) protein
 - 500,000 kg delivery per year
 - total bacterial count 24,999, somatic cell count 249,999

Dairies

17 large and geographical spread European dairies

- Belgium: Milcobel
- Denmark: Arla Foods
- Germany: Alois Müller, Humana Milchunion eG and Nordmilch
- Finland: Hameenlinnan Osuusmeijeri
- France: Bongrain, Danone, Lactalis and Sodiaal
- Ireland: Glanbia and Kerry
- Italy: Granarolo
- Netherlands: DOC Kaas and FrieslandCampina
- UK: Dairy Crest and First Milk

EU compared with New Zealand (Fonterra) and USA


www.milkprices.nl



International Milk Price Reviews

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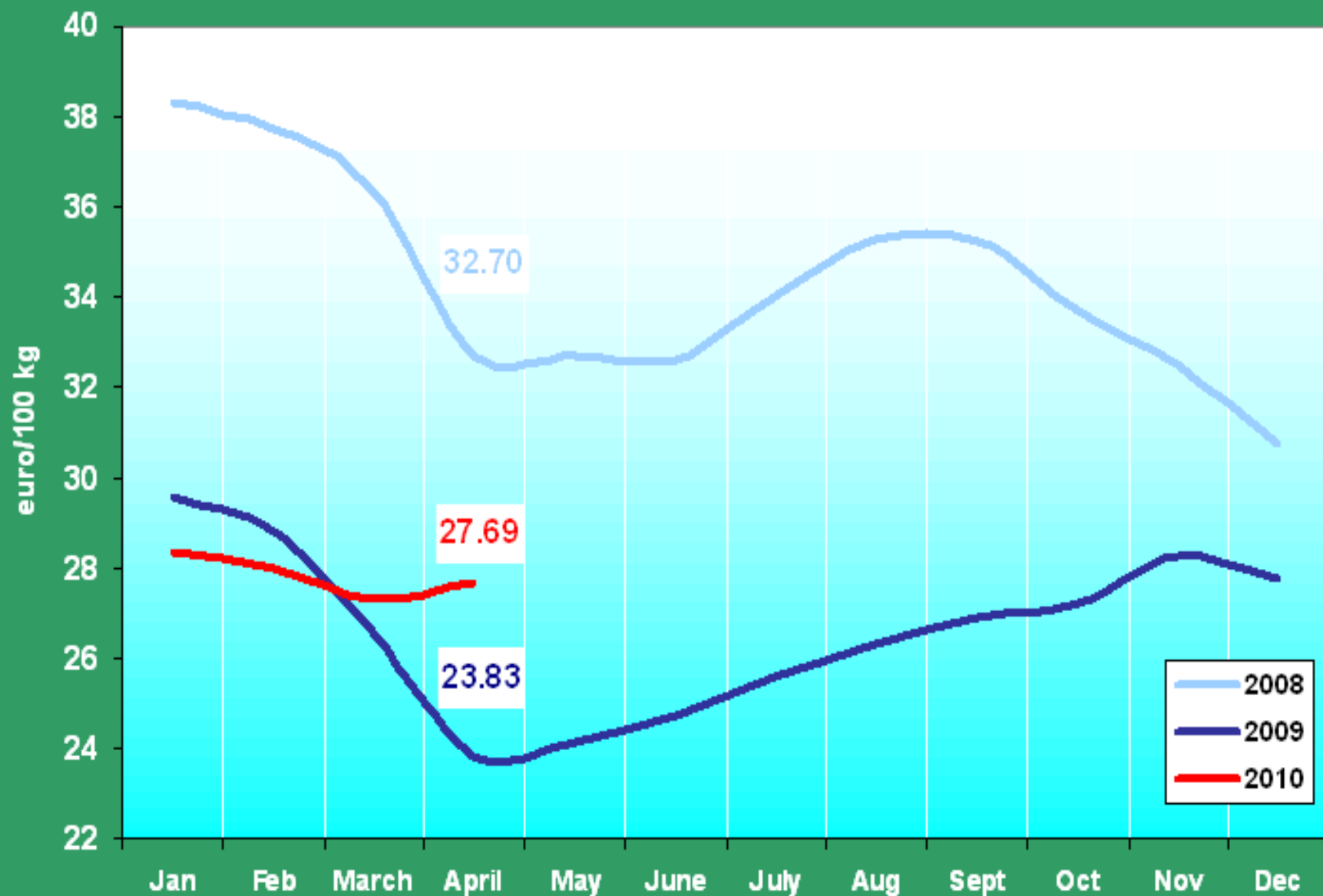
INTERNATIONAL MILK PRICE REVIEW for April 2010 deliveries

(for standardized (1) milk and based on payment systems of the companies)

All prices expressed in euro/100 kg

Company		Quality adjustment	Quantity adjustment	Seasonal adjustment	MILK PRICE this month	Most recent supplementary payment	Rolling av last 12 months (4)
Milcobel	BE	0.73	1.37		30.08	0.67	27.26
Alois Müller	DE	0.51			28.09	0.46	25.68
Humana Milch Union eG	DE				27.83	-0.18	25.34
Nordmilch	DE		0.15		27.83	-0.15	24.65
Arla Foods	DK	0.54			27.09	2.04	27.87
Hämeenlinnan Osuusmeijeri	FI	2.14		-2.59	30.86	1.17	37.33
Bongrain CLE (Basse Normandie)	FR	0.74			29.45	none	28.92
Danone (Pas de Calais)	FR				29.38	none	29.49
Lactalis (Pays de la Loire)	FR				28.47	none	28.58
Sodiaal	FR	0.58			29.36	none	29.59
Dairy Crest (Davidstow)	GB	-0.22	0.33	- 2.50	25.05	0.00	27.29
First Milk	GB	0.56	2.08		21.97	0.00	23.49
Glanbia	IE				27.96	0.00	23.62
Kerry	IE				27.85	none	23.56
DOC Kaas	NL	0.05	0.34		26.53	1.53	25.09
Friesland Campina	NL	0.05	0.75	-2.30	25.19	0.86	26.90
AVERAGE MILK PRICE THIS MONTH (2)					27.69		27.17
Granarolo (North)	IT	1.15	3.42		33.98	none	33.96
Fonterra (5)	NZ				26.26	0.00	24.47
United States of America (3)	US	0.11			24.03	none	21.85

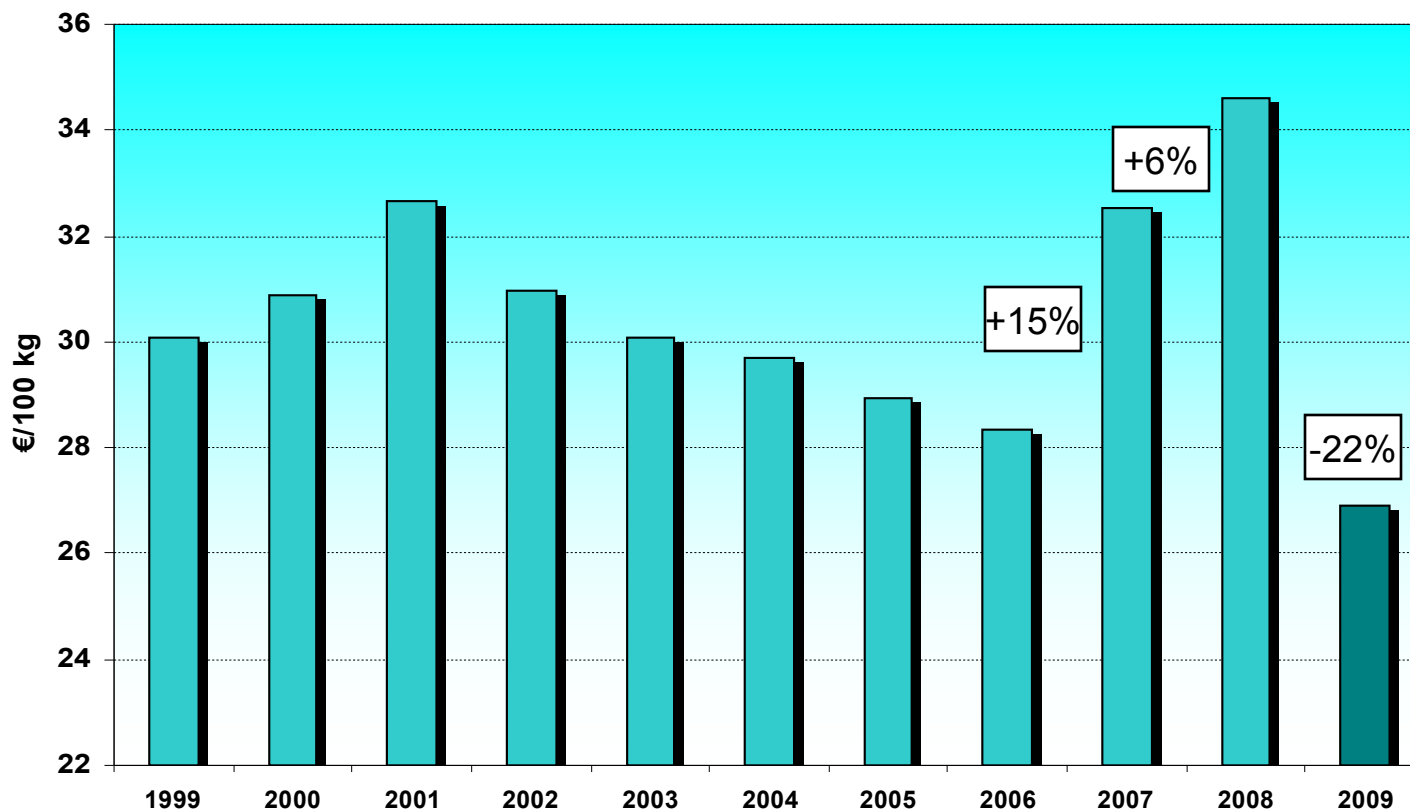
Average milk price April 2010 € 3.86 higher than last year



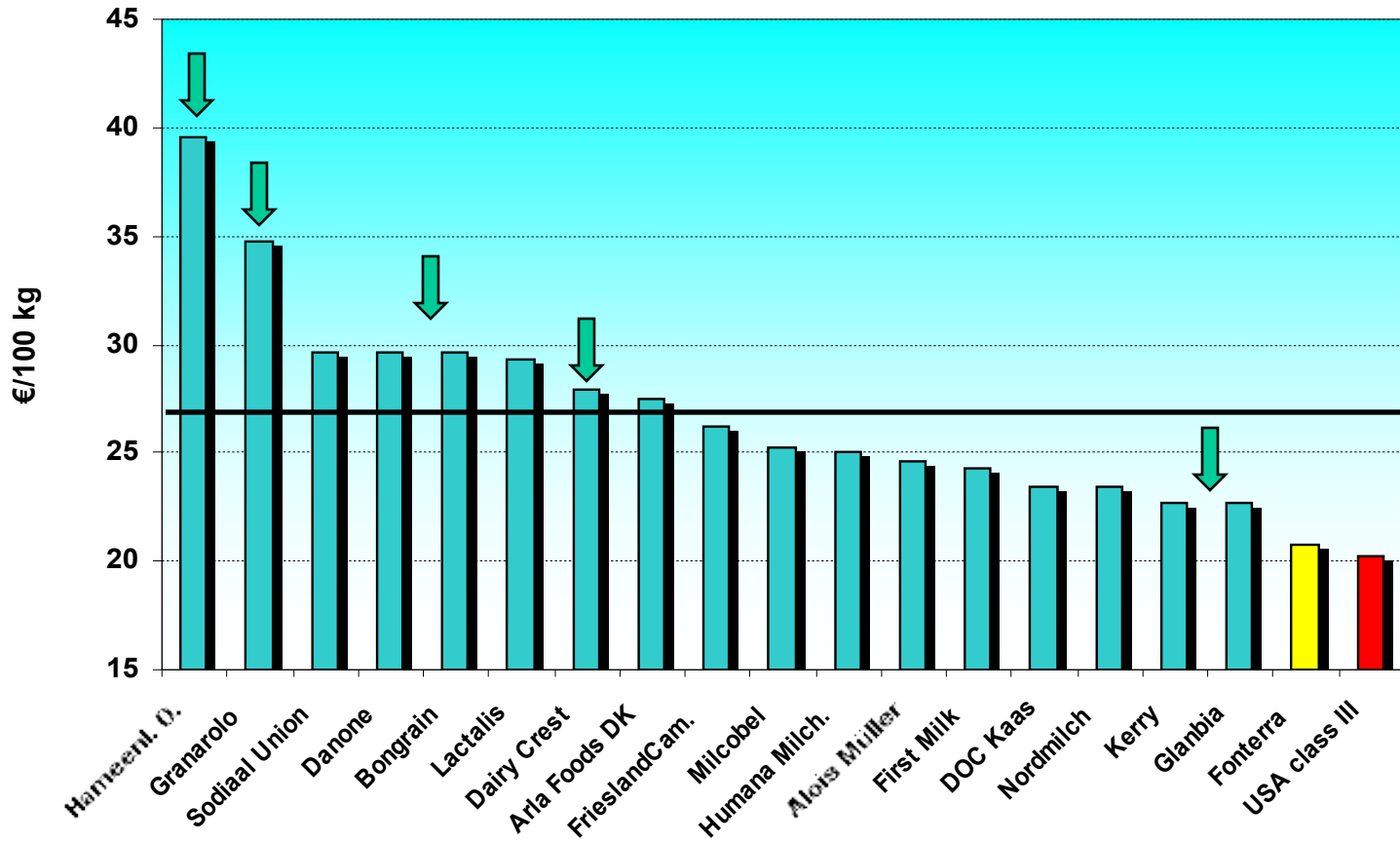
Annual milk prices

- Milk price per calendar year = Weighted monthly milk prices + Supplementary payments end-of-the-year profits (Corrected for date of payment and for invested capital)
- July 5th 2010 Publication Annual Report 2009 (at www.milkprices.nl)

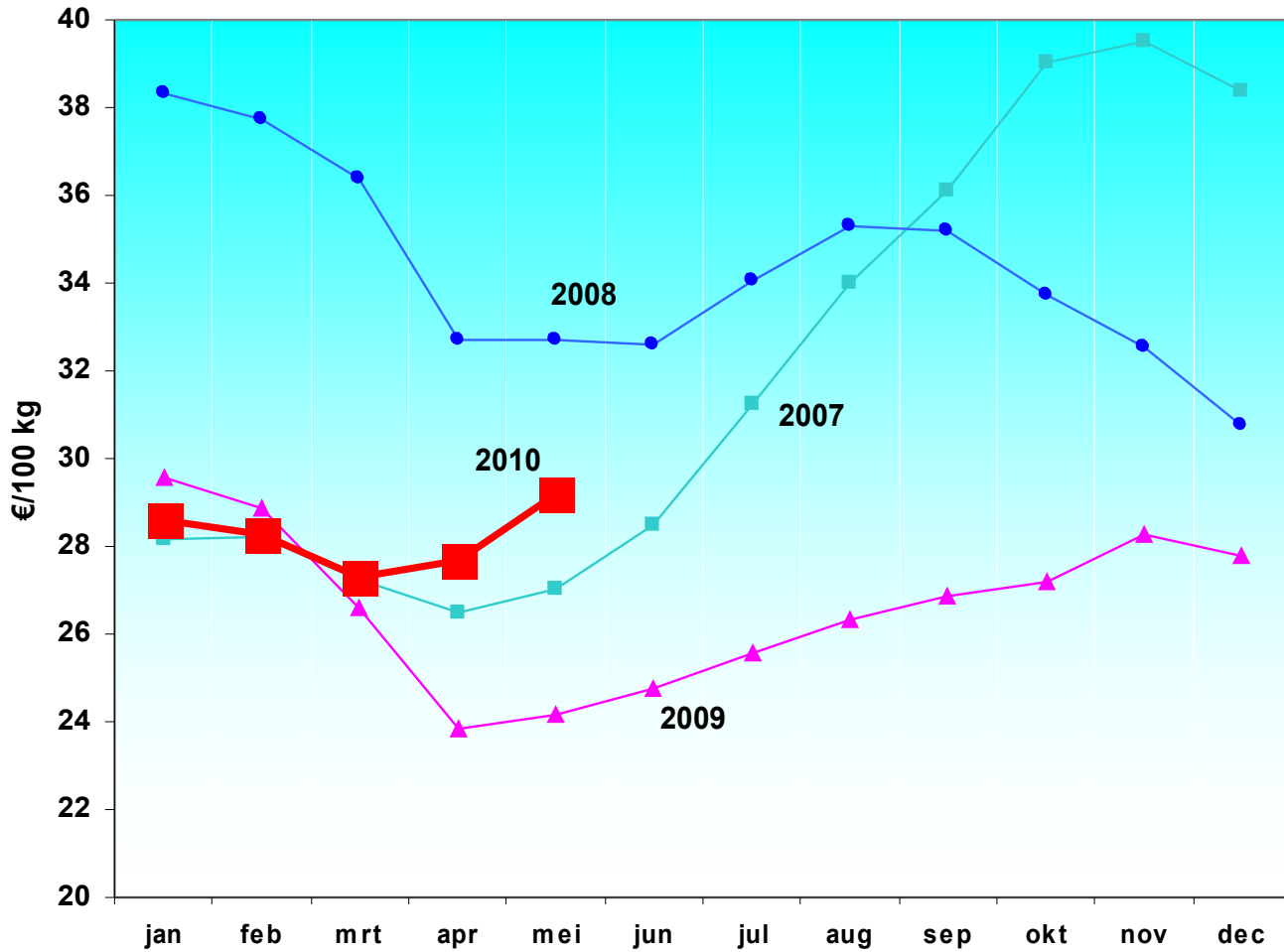
Average annual milk prices european dairies (2009 provisional)



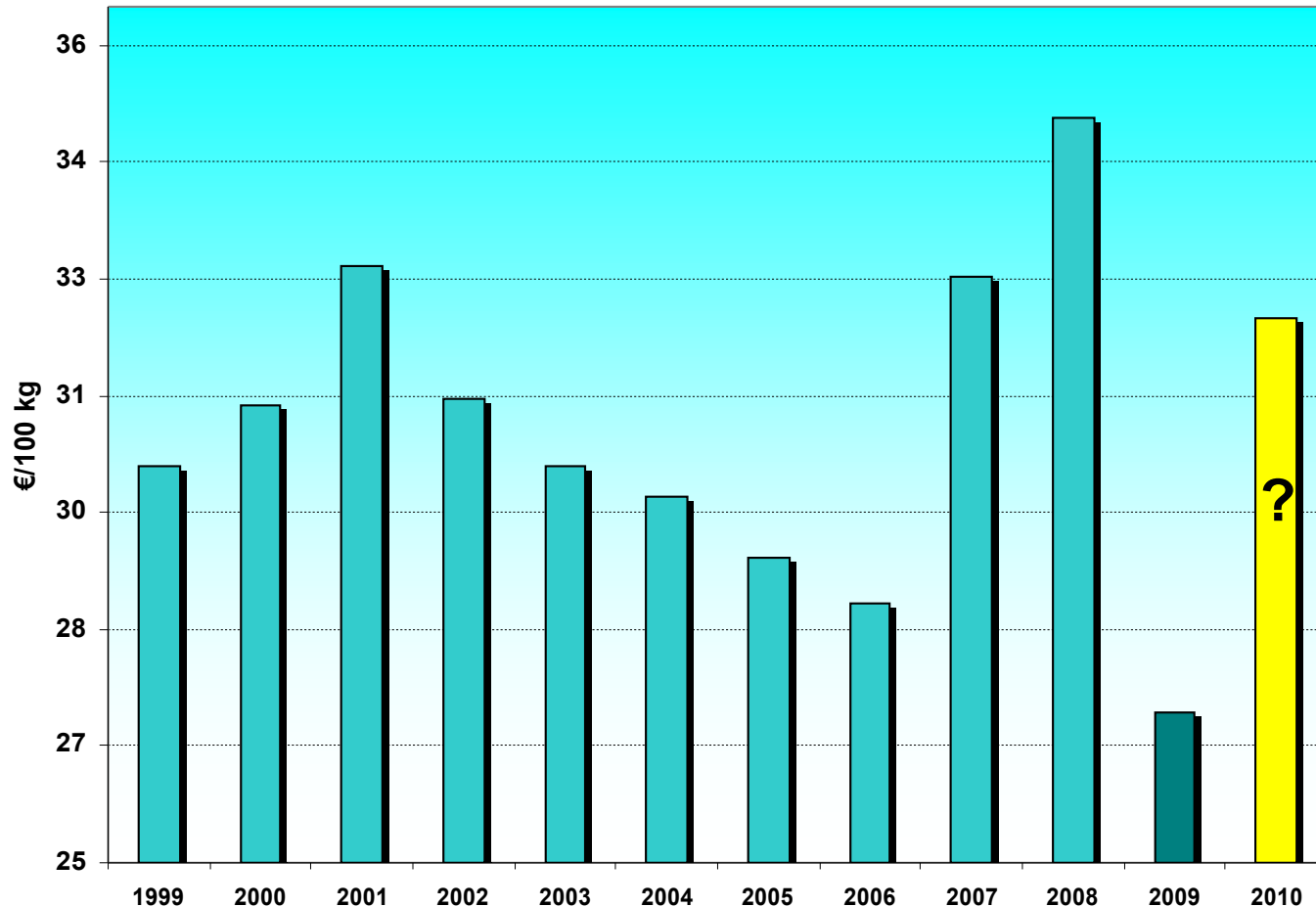
Milk prices 2009 (provisional)



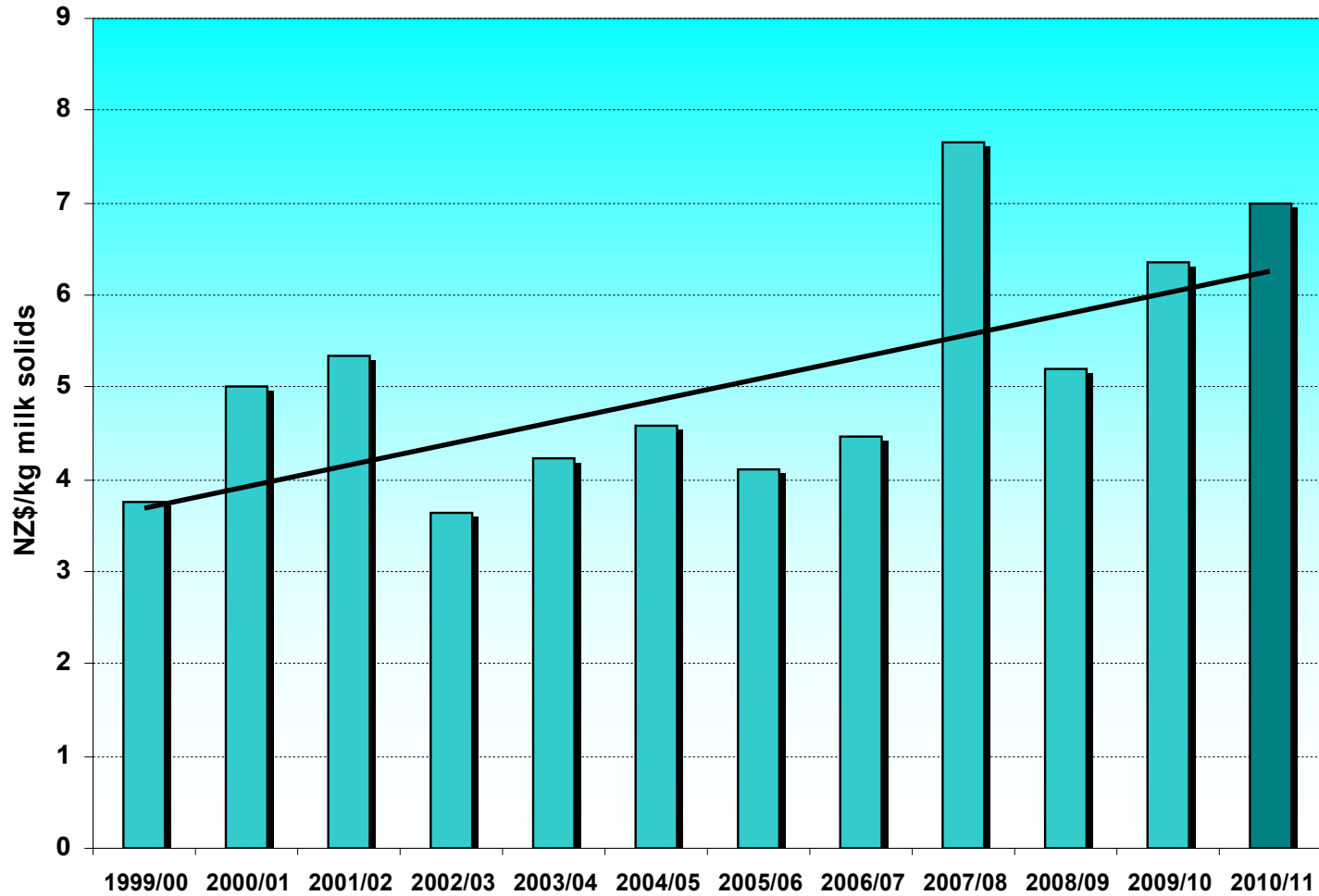
Milk prices 2010 (av. Jan-May)



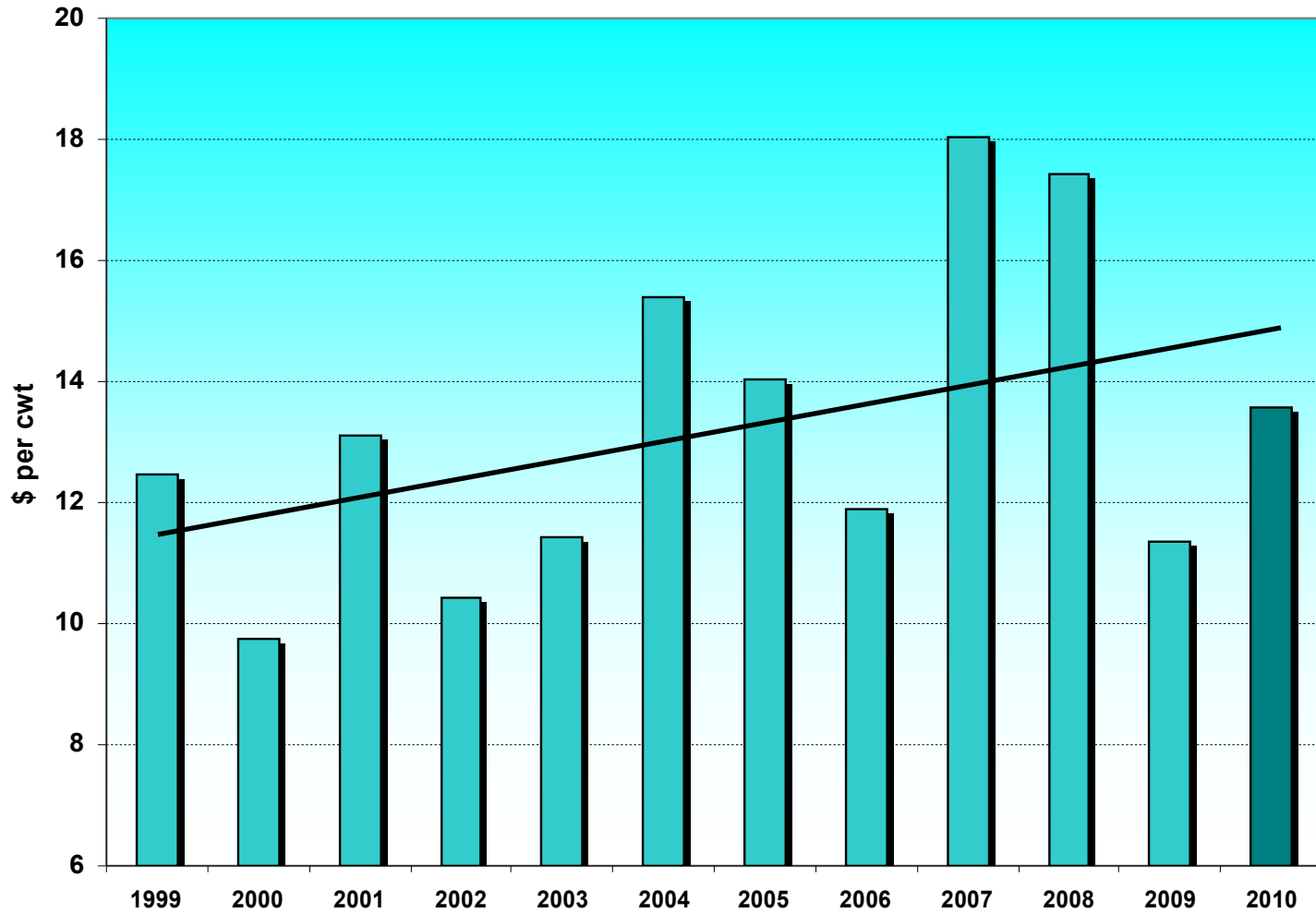
Average annual milk prices european dairies



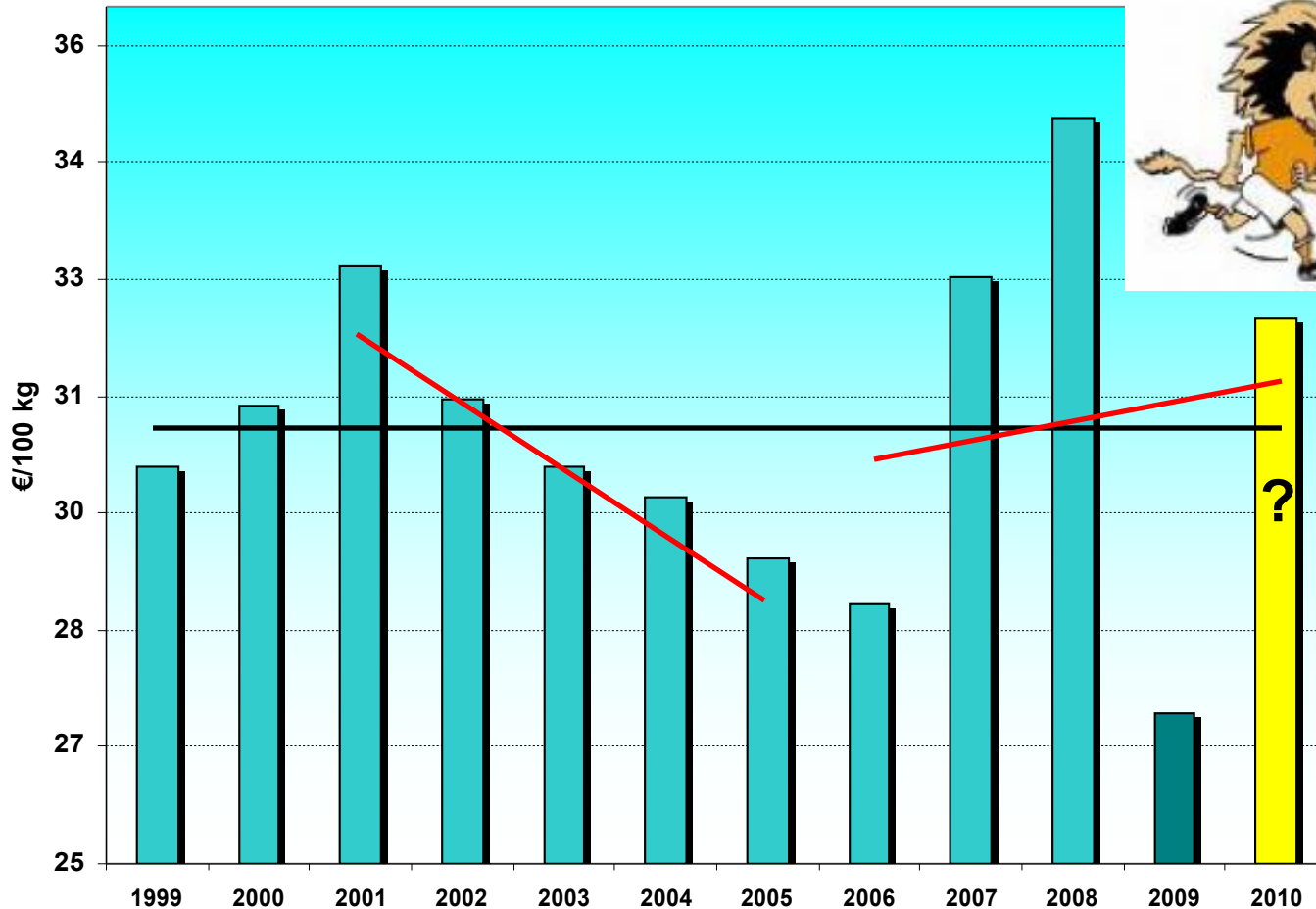
New Zealand (Fonterra)



USA Class III



Average annual milk prices european dairies





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