Dutch dairy in figures
2017
Dutch dairy in figures 2017

The Netherlands is a dairy country with a long tradition of milk, butter and cheese production and consumption. The characteristic meadow landscape with cows and windmills is inextricably linked to the image of our country. Behind this image lies a modern sector, with an eye for people, animals and the environment. It is one of the largest and most vital agricultural sectors in the Netherlands and makes an important contribution to the Dutch economy.

From local traditions to an international business

The strongly internationally-oriented business model we see in dairy today has developed over 150 years from a mainly locally-focused on-farm dairy production. Growth in scale at the farm level, and especially the possibilities offered by refrigerated transport, were major milestones in the development of the Dutch dairy industry. Since the 1960s, dairy factories have seen considerable growth in their range of activities and scale. These developments also led to a greater efficiency in processing at fewer and fewer locations.

The major impact of quotas

The introduction of milk quotas in Europe in the early 1980s marked a new phase in the development of the dairy sector. Quotas curbed the productivity improvement in dairy farming through economies of scale. This led to an accelerated development in business efficiency through a steadily declining dairy herd and a growing production per cow. In the dairy industry, the limits imposed on the quantity of milk gave an extra boost to the pursuit of greater efficiency, as a result of which the Dutch dairy industry became one of the most consolidated in the world.

Phosphate ceiling

The abolition of milk quotas at the end of March 2015 and the long-term promising developments in the global dairy market boosted new investments in dairy farming and the dairy industry in recent years, aimed at capacity growth through modernisation, expansion and new construction. However, the strong growth in dairy farming led to an overshoot of the phosphate production ceiling set by the European Commission for the Netherlands in 2015 and 2016. In order to reduce phosphate production, the phosphate reduction plan came into effect in 2017, followed by a system of phosphate rights put in place as from 1 January 2018. As a result of these measures, the dairy herd decreased significantly in 2017 and little room for growth in milk production will be available in the coming years.
Drinking milk and other fresh milk products 7.1%

Cheese 55.4%

Butter and butter oil 1.6%

Milk powder 13.7%

Condensed milk 5.6%

Other 16.6%

Contribution to trade surplus: 7%

17.5 thousand dairy farms

Milk processing

Export revenues € 6.4 billion

1.8 million dairy cows

0.3 million dairy goats

1.1 million hectares of grassland and maize

45 thousand fte's in dairy farming and milk processing industry

Milk, cheese and yoghurt in the Wheel of Five (Dutch dietary guidelines)

28% of the surface area of the Netherlands

Outdoor grazing at almost 80% of the dairy farms

Cow milk production 14.5 billion kg

Goat milk production 0.3 billion kg

1.7 million dairy cows

0.4 million dairy goats

1.1 million hectares of grassland and maize

17 thousand dairy farms

27% of the surface area of the Netherlands

Dairy consumption 355 grams per day

Breakfast 27%

Lunch 25%

Dinner 27%

In-between 21%

Conclusion

Source: ZuivelNL, RVO.nl, Statistics Netherlands (CBS), Wageningen Economic Research, Sustainable Dairy Chain, RIVM
**Economic importance**

**Contribution of Agro & Food to the Dutch economy 2016**

- **Dutch economy**: € 631.0 billion
- **Agro & Food**: € 437.7 billion (6.9%)
- **Dairy**: € 8.3 billion (1.3%)

**Added value Dutch dairy complex**

- **2016**: Dairy farming: 2,000, Milk processing industry: 8,000, Distribution: 4,000, Dairy sector related services*: 2,000
- **2015**: Dairy farming: 1,900, Milk processing industry: 8,100, Distribution: 3,900, Dairy sector related services*: 1,900
- **2016**: Dairy farming: 2,000, Milk processing industry: 8,000, Distribution: 4,000, Dairy sector related services*: 2,000

* Among other agricultural and financial services, utilities and employment agencies

**Gross production value Dutch agriculture**

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>% share 2015</th>
<th>% share 2016</th>
<th>% share 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Horticulture</td>
<td>10.2</td>
<td>10.1</td>
<td>10.5</td>
<td>38.1%</td>
<td>37.4%</td>
<td>36.1%</td>
</tr>
<tr>
<td>Livestock, meat and eggs</td>
<td>5.4</td>
<td>5.5</td>
<td>5.8</td>
<td>20.4%</td>
<td>20.4%</td>
<td>19.8%</td>
</tr>
<tr>
<td>Dairy farming</td>
<td>4.4</td>
<td>4.6</td>
<td>5.7</td>
<td>16.4%</td>
<td>16.9%</td>
<td>19.7%</td>
</tr>
<tr>
<td>Arable farming</td>
<td>3.1</td>
<td>3.4</td>
<td>3.4</td>
<td>11.6%</td>
<td>12.4%</td>
<td>11.8%</td>
</tr>
<tr>
<td>Other</td>
<td>3.6</td>
<td>3.5</td>
<td>3.7</td>
<td>13.4%</td>
<td>12.8%</td>
<td>12.7%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>26.8</strong></td>
<td><strong>27.0</strong></td>
<td><strong>29.1</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>100.0%</strong></td>
</tr>
</tbody>
</table>

* The indicative value of Dutch dairy production (concerns only the production of the milk processing industry) amounted to € 7.7 billion in 2017

**Trade balance 2017**

- **Positive trade balance**
  - **Total**: € 57.1 billion
  - **Agricultural products**: € 27.3 billion
  - **Dairy products (*)**: € 4.2 billion

* Including producers of ice cream, on-farm processors, industrial processors of dairy (semi-finished products) and other related dairy companies

**Employment in dairy farming and milk processing industry in the Netherlands**

- **2010**: Dairy farming 34,900, Milk processing industry 9,700
- **2016**: Dairy farming 34,100, Milk processing industry 13,000

* Source: Eurostat, Wageningen Economic Research
Market overview

Market prices

High fat prices, very low protein prices and strong price fluctuations characterised the market in 2017. Consumption of dairy products such as butter is structurally increasing due to a more positive consumer perception of milk fat. The protein market remained under pressure however due to high stock levels of skimmed milk powder in the EU and US.

The butter price rose uninterruptedly after a short period of decline in early 2017, until mid-September, when the price of butter, as represented by the Dutch quotation, reached the record level of almost € 700 per 100 kg. From the end of September, fat prices came under great pressure, caused by a drop in demand and an increasing supply due to the rapidly growing milk production. This led to a sharp downward price correction that lasted until the end of the year.

The price of skimmed milk powder dropped practically throughout the year, with a brief interruption from April to mid-June, partly as a result of intervention purchases in that period. From June onwards, prices were under pressure again due to the sharp increase in milk supply in the EU in particular, the increased competition on the world market and an unfavourable EUR/USD exchange rate. The negative sentiment in the market was reinforced by the substantial EU (intervention) stocks and uncertainty about how the European Commission would deal with this. The Dutch quotation of skimmed milk powder fell until the end of the year and was ultimately well below the intervention price level.

The prices of whole milk powder and cheese largely reflected the developments in the fat and protein market, but were at a significantly higher level than in 2016.

The average price level of the fat-related products was ultimately clearly higher in 2017 than in 2016. The average quotation of butter was 60% higher, that of whole milk powder almost 27%. The average indicative value for Gouda cheese increased by 31%. The average quotation of skimmed milk powder was ultimately almost 3% lower than in 2016. In contrast, the average price of whey powder showed an increase of 22%.

Consumption of butter in several countries

Dutch dairy in figures 2017
Milk prices

Milk prices rose slightly in the first half of 2017. This was the result of the increased fat prices, which compensated for the effect of the decreased protein prices. The acceleration in the price increase of fat-related products in the second and third quarter meant that milk prices rose sharply in the third quarter and in October in particular. After this, milk prices remained at a stable level, despite the sharp fall in fat prices in combination with low protein prices.

The average milk price paid to dairy farmers in 2017 rose by as much as 34% after having fallen for two years.

International milk price comparison

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Granarolo (Noord)</td>
<td>Italy</td>
<td>36.93</td>
<td>39.79</td>
<td>7.8%</td>
</tr>
<tr>
<td>Friesland-Campina</td>
<td>Netherlands</td>
<td>31.27</td>
<td>38.63</td>
<td>23.5%</td>
</tr>
<tr>
<td>Royal A-ware</td>
<td>Netherlands</td>
<td>27.30</td>
<td>38.06</td>
<td>39.4%</td>
</tr>
<tr>
<td>Valio</td>
<td>Finland</td>
<td>35.21</td>
<td>36.64</td>
<td>4.1%</td>
</tr>
<tr>
<td>Arla Foods DK</td>
<td>Denmark</td>
<td>28.44</td>
<td>36.46</td>
<td>28.2%</td>
</tr>
<tr>
<td>Milcobel</td>
<td>Belgium</td>
<td>27.29</td>
<td>35.75</td>
<td>31.0%</td>
</tr>
<tr>
<td>DMK</td>
<td>Germany</td>
<td>24.96</td>
<td>35.62</td>
<td>42.7%</td>
</tr>
<tr>
<td>Müller (Leppersdorf)</td>
<td>Germany</td>
<td>26.20</td>
<td>35.36</td>
<td>34.9%</td>
</tr>
<tr>
<td>Danone (Pas de Calais)</td>
<td>France</td>
<td>31.57</td>
<td>34.46</td>
<td>9.2%</td>
</tr>
<tr>
<td>Sodiaal (Pas de Calais)</td>
<td>France</td>
<td>30.48</td>
<td>34.33</td>
<td>12.6%</td>
</tr>
<tr>
<td>Kerry Agribusiness</td>
<td>Ireland</td>
<td>24.84</td>
<td>34.27</td>
<td>38.0%</td>
</tr>
<tr>
<td>Glanbia</td>
<td>Ireland</td>
<td>22.99</td>
<td>34.27</td>
<td>49.1%</td>
</tr>
<tr>
<td>Dairygold</td>
<td>Ireland</td>
<td>24.62</td>
<td>34.25</td>
<td>39.1%</td>
</tr>
<tr>
<td>Hochwald Milch eG</td>
<td>Germany</td>
<td>26.14</td>
<td>34.14</td>
<td>30.6%</td>
</tr>
<tr>
<td>Savencia (Basse Normandié)</td>
<td>France</td>
<td>29.78</td>
<td>33.92</td>
<td>13.9%</td>
</tr>
<tr>
<td>Lactalis (Pays de la Loire)</td>
<td>France</td>
<td>29.60</td>
<td>33.54</td>
<td>13.3%</td>
</tr>
<tr>
<td>Dairy Crest (Davidstow)</td>
<td>United Kingdom</td>
<td>27.03</td>
<td>32.63</td>
<td>20.7%</td>
</tr>
<tr>
<td><strong>Average milk price</strong></td>
<td><strong>28.51</strong></td>
<td><strong>35.42</strong></td>
<td><strong>24.2%</strong></td>
<td></td>
</tr>
</tbody>
</table>

Note: prices for standard milk with 4.2% fat and 3.4% protein with an annual delivery of 1,000,000 kg milk (excluding VAT, including supplementary payments and excluding premiums for special milk flows)
**Dairy farming**

**Milk production**

In 2017, Dutch dairy farms produced almost as much milk (14.5 billion kg) as in 2016. As a result of the phosphate reduction plan, the dairy herd declined considerably in 2017. According to Statistics Netherlands (CBS), the Netherlands had 1.67 million dairy cows at the beginning of December 2017, almost 130 thousand fewer (-7%) than a year before. Despite the sharp shrinkage in the number of dairy cows, the amount of milk produced has remained constant, by increasing the milk yield per cow. This amounted to an average of 8,560 kg per cow in 2017, almost 3% higher than in 2016.

The strong decline in the dairy herd in 2017 meant that phosphate production in 2017 only just exceeded the sector ceiling of 84.9 million kg of phosphate. With the introduction of the phosphate rights system in January 2018, Dutch dairy farming was expected to fall below the ceiling again.

**Size of scale**

The structure development within dairy farming has been characterised for decades by a decreasing number of farms and a continuing increase in scale. The number of dairy farms with more than 100 dairy cows was 6,660 in 2017, almost four times as much as in the year 2000. Compared to 2016, however, this meant a sharp decline in the number of farms in this size class (-5%), caused by the imposed contraction in the dairy herd.
Outdoor grazing in the Netherlands

In comparison with total dairy farming

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of organic dairy farmers</th>
<th>% of total</th>
<th>Organic milk production (million kg)</th>
<th>% of total</th>
<th>Milk production per dairy farm (kg)</th>
<th>Number of dairy cows per dairy farm</th>
<th>Milk yield per dairy cow (kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>310</td>
<td>1.6%</td>
<td>137</td>
<td>1.2%</td>
<td>Organic dairy farm</td>
<td>442,000</td>
<td>67.8</td>
</tr>
<tr>
<td>2015</td>
<td>360</td>
<td>2.0%</td>
<td>184</td>
<td>1.4%</td>
<td>Average dairy farm</td>
<td>512,000</td>
<td>77.0</td>
</tr>
<tr>
<td>2016</td>
<td>440</td>
<td>2.5%</td>
<td>245</td>
<td>1.7%</td>
<td>Organic dairy farm</td>
<td>558,000</td>
<td>84.1</td>
</tr>
<tr>
<td>2017</td>
<td>480</td>
<td>2.7%</td>
<td>267</td>
<td>1.8%</td>
<td>Average dairy farm</td>
<td>556,000</td>
<td>97.4</td>
</tr>
</tbody>
</table>

Outdoor grazing: dairy cows graze in the meadows at last 120 days per year for a minimum of six hours per day

Organic milk production in several European countries 2017

<table>
<thead>
<tr>
<th>Country</th>
<th>2017 million kg</th>
<th>2017/2010 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>939</td>
<td>57%</td>
</tr>
<tr>
<td>France</td>
<td>644</td>
<td>127%</td>
</tr>
<tr>
<td>Denmark</td>
<td>541</td>
<td>14%</td>
</tr>
<tr>
<td>Austria</td>
<td>526</td>
<td>38%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>440</td>
<td>-4%</td>
</tr>
<tr>
<td>Sweden</td>
<td>400</td>
<td>54%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>267</td>
<td>95%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>233</td>
<td>12%</td>
</tr>
<tr>
<td>Finland</td>
<td>64</td>
<td>108%</td>
</tr>
</tbody>
</table>

Organic milk production in the Netherlands

Outdoor grazing: dairy cows graze in the meadows at last 120 days per year for a minimum of six hours per day

Source: Sustainable Dairy Chain, ZuivelNL
Milk processing industry

Milk deliveries
At the beginning of 2017, there was a contraction in milk deliveries in the main dairy exporting countries. With the exception of the US, volume declined both in the EU and in Oceania and South America. In the second quarter, the picture changed and there was global growth again which was maintained until the end of the year. However, milk supply in the EU only really started to get underway in the second half of the year. Ultimately, the volume in the EU in 2017 increased by almost 2% on balance. Strongest growth was achieved in Ireland, the United Kingdom, Poland and Italy. Milk deliveries in Germany were just as in the Netherlands (-0.2%) slightly lower than in the previous year.

Milk processing
The Dutch dairy industry processed an estimated 14.1 billion kg of milk in 2017, slightly less than in 2016. Less milk was used for the production of cheese, butter and -oil, skimmed milk powder and condensed milk. Cheese production fell by almost 3% in 2017 to a volume of 865 thousand tons. On the other hand, non-skimmed milk powder production increased sharply for the second year in a row (+13%).

Development of milk deliveries in major exporting countries

Argentina, Australia, Brazil, Canada, Chile, EU-28, New Zealand, Uruguay and the USA

Milk deliveries and dairy production EU 2017
Relative share of several EU Member States in total volume

Dutch dairy in figures 2017

source: Eurostat, RVO.nl, IDF, National Statistics

source: RVO.nl, ZuivelNL

* based on the development in the monthly figures

Dutch industrial dairy production

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Milk delivered to factories</td>
<td>14,324</td>
<td>14,297</td>
<td>-0.2%</td>
</tr>
<tr>
<td>Milk available for processing</td>
<td>14,172</td>
<td>14,100</td>
<td>-0.5%</td>
</tr>
<tr>
<td>Drinking milk and other fresh milk products (excluding added ingredients, including cream)</td>
<td>1,000</td>
<td>1,029</td>
<td>2.9%</td>
</tr>
<tr>
<td>Cheese (including cottage cheese)</td>
<td>888</td>
<td>865</td>
<td>-2.6%</td>
</tr>
<tr>
<td>Butter and butteroil</td>
<td>232</td>
<td>223</td>
<td>-3.8%</td>
</tr>
<tr>
<td>Non-skimmed milk powder</td>
<td>166</td>
<td>187</td>
<td>12.6%</td>
</tr>
<tr>
<td>Skimmed milk powder</td>
<td>70</td>
<td>67</td>
<td>-4.5%</td>
</tr>
<tr>
<td>Condensed milk (including coffee milk)</td>
<td>372</td>
<td>367</td>
<td>-1.4%</td>
</tr>
</tbody>
</table>

source: RVO.nl, ZuivelNL

Development of milk deliveries in major exporting countries

Cumulative (relative mutation compared to the year before)

Overview per exporting country (absolute mutation compared to the year before)

Milk deliveries

billion kg


Cumulative (relative mutation compared to the year before)

Overview per exporting country (absolute mutation compared to the year before)

Milk deliveries

billion kg


Milk delivered to factories

14,324

14,297

-0.2%

Milk available for processing

14,172

14,100

-0.5%

Drinking milk and other fresh milk products (excluding added ingredients, including cream)

1,000

1,029

2.9%

Cheese (including cottage cheese)

888

865

-2.6%

Butter and butteroil

232

223

-3.8%

Non-skimmed milk powder

166

187

12.6%

Skimmed milk powder

70

67

-4.5%

Condensed milk (including coffee milk)

372

367

-1.4%

Dutch dairy in figures 2017

17

Dutch dairy in figures 2017

16

Dutch dairy in figures 2017

16

Dutch dairy in figures 2017

17

Dutch dairy in figures 2017

16

Dutch dairy in figures 2017

17

Dutch dairy in figures 2017

16

Dutch dairy in figures 2017

17

Dutch dairy in figures 2017

16

Dutch dairy in figures 2017

17
**Geographical spread of milk processing industry**

Situation from 31-12-2017

**Top 20 largest dairy companies**

Turnover in 2016 + mergers and acquisitions between 1 January and 30 June 2017

<table>
<thead>
<tr>
<th>Company</th>
<th>Country</th>
<th>Revenue (billion €)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nestlé</td>
<td>Switzerland</td>
<td>21.7</td>
</tr>
<tr>
<td>Danone</td>
<td>France</td>
<td>16.6</td>
</tr>
<tr>
<td>Lactalis</td>
<td>France</td>
<td>16.3</td>
</tr>
<tr>
<td>Dairy Farmers of America</td>
<td>USA</td>
<td>12.2</td>
</tr>
<tr>
<td>FrieslandCampina</td>
<td>Netherlands</td>
<td>11.1</td>
</tr>
<tr>
<td>Fonterra</td>
<td>New Zealand</td>
<td>10.8</td>
</tr>
<tr>
<td>Arla Foods</td>
<td>Denmark/Sweden</td>
<td>8.9</td>
</tr>
<tr>
<td>Yili</td>
<td>China</td>
<td>8.1</td>
</tr>
<tr>
<td>Saputo</td>
<td>Canada</td>
<td>7.6</td>
</tr>
<tr>
<td>Mengniu</td>
<td>China</td>
<td>7.4</td>
</tr>
<tr>
<td>Dean Foods</td>
<td>USA</td>
<td>6.7</td>
</tr>
<tr>
<td>Unilever</td>
<td>Netherlands/UK</td>
<td>6.2 *</td>
</tr>
<tr>
<td>Kraft Heinz</td>
<td>USA</td>
<td>5.7</td>
</tr>
<tr>
<td>Meiji</td>
<td>Japan</td>
<td>5.5</td>
</tr>
<tr>
<td>DMK</td>
<td>Germany</td>
<td>5.1</td>
</tr>
<tr>
<td>Sodiaal</td>
<td>France</td>
<td>4.8</td>
</tr>
<tr>
<td>Schreiber Foods</td>
<td>USA</td>
<td>4.4 *</td>
</tr>
<tr>
<td>Savencia</td>
<td>France</td>
<td>4.4</td>
</tr>
<tr>
<td>Müller</td>
<td>Germany</td>
<td>4.4 *</td>
</tr>
<tr>
<td>Agropur</td>
<td>Canada</td>
<td>4.2</td>
</tr>
</tbody>
</table>

*estimate

**Structure**

At the end of 2017, the Dutch dairy industry consisted of 25 companies with a total of 53 production sites. Five of these companies are cooperatives. They process the milk in 27 factories.

The production value was estimated at €7,700 million in 2017, which meant a significant increase (+ 20%) compared to the years 2015 and 2016. This was mainly due to the strongly increased revenue for fat-related products such as cheese, butter and -oil and whole milk powder, in which almost two-thirds of Dutch milk is processed. Per 100 kg of processed milk, the production value came to a level of €54.61, almost 21% higher than in 2016.
Trade

Exports

The total export value grew by 22% in 2017 to an amount of €7.9 billion. Growth was achieved for all major product groups. The main contribution to growth was provided by the product groups cheese, butter and -oil, and non-skimmed milk powder. In particular, the export value of butter and -oil showed a significant increase (+ 44%).

The export value of cheese increased by almost 14% due to the sharp rise in the average price level. The volume remained stable at 913 thousand tons. The trade of cheese to EU Member States slightly decreased in 2017. More than 2% more was exported to countries outside the EU, in particular to Asia, Central and South America and Oceania. However, much less cheese was exported to Africa. In the case of butter and -oil, and non-skimmed milk powder, the growth of the export value was also the result of the significantly higher average price level. The export volume of these product groups decreased. The export value of skimmed milk powder increased mainly due to the substantial volume increase, but also due to a higher average price level.

The EU is the most important sales region for Dutch dairy products. In 2017, intra-trade accounted for more than €5.7 billion, almost three-quarters of the total export value. Germany, Belgium and France are the most important markets in the EU. The Netherlands is also the most active of all member states on the world market, with a share of more than 5% in world trade. This makes the Netherlands the fifth dairy exporter in the world, after New Zealand, the United States, Australia and Belarus. The most important destinations for Dutch dairy exports outside the EU in 2017 were China (including Hong Kong), Japan and Algeria.

Dutch export value per destination 2017

- **European Union:** €5.7 billion
  - Germany: 34%
  - Belgium: 23%
  - France: 13%
  - Italy: 4%
  - Spain: 5%
  - United Kingdom: 5%
- **Other EU:** €2.2 billion
  - Sweden: 3%
  - Greece: 3%
  - Other EU: 9%
- **Third countries:** €2.2 billion
  - China (incl. Hong Kong): 12%
  - Japan: 6%
  - Mexico: 3%
  - Indonesia: 3%
  - Kuwait: 4%
  - United Arab Emirates: 4%
- **Other third countries:** €6.1 billion
  - Algeria: 6%
  - Saudi Arabia: 5%
  - South Korea: 5%
  - Nigeria: 4%
- **Non-EU-28 Asia, Africa, Central and South America:** €500 million
  - Other third countries: 45%
  - China (incl. Hong Kong): 12%
  - Japan: 6%
  - Saudi Arabia: 5%
  - Mexico: 3%
  - South Korea: 5%
  - USA: 4%
  - Nigeria: 4%
  - United Arab Emirates: 4%
  - Other EU: 9%

**Source:** ZuivelNL, Eurostat, Statistics Netherlands (CBS)

Export value of Dutch dairy products 2017

- **Cheese:** €5,730 mln
  - **EU-28:** €2,690 mln
  - **Third countries:** €1,164 mln
    - **Japan:** €296.7 mln
    - **Indonesia:** €26.7 mln
  - **Other EU:** €1,154 mln
    - **China (incl. Hong-Kong):** €226.7 mln
    - **Singapore:** €23.7 mln
    - **Other:** €156.7 mln
- **Butter and butteroil:** €1,164 mln
  - **EU-28:** €580 mln
  - **Third countries:** €199 mln
    - **Japan:** €59.7 mln
    - **Saudi Arabia:** €59.7 mln
    - **Kuwait:** €49.7 mln
    - **Indonesia:** €49.7 mln
  - **Other EU:** €149 mln
    - **China (incl. Hong-Kong):** €116.7 mln
    - **Singapore:** €116.7 mln
    - **Other:** €116.7 mln
- **Milk and cream:** €1,009 mln
  - **EU-28:** €199 mln
  - **Third countries:** €79 mln
    - **Japan:** €39.9 mln
    - **Saudi Arabia:** €39.9 mln
    - **Kuwait:** €39.9 mln
    - **Indonesia:** €39.9 mln
  - **Other EU:** €213 mln
    - **China (incl. Hong-Kong):** €193.9 mln
    - **Singapore:** €193.9 mln
    - **Other:** €193.9 mln
- **Non-skimmed milk powder:** €610 mln
  - **EU-28:** €199 mln
  - **Third countries:** €100 mln
    - **China (incl. Hong-Kong):** €75.6 mln
    - **South Korea:** €75.6 mln
    - **Vietnam:** €75.6 mln
  - **Other EU:** €206 mln
    - **China (incl. Hong-Kong):** €144.6 mln
    - **South Korea:** €144.6 mln
    - **Vietnam:** €144.6 mln
    - **Other:** €144.6 mln
- **Skimmed milk powder:** €199 mln
  - **EU-28:** €100 mln
  - **Third countries:** €99 mln
    - **Indonesia:** €21.8 mln
    - **Saudi Arabia:** €21.8 mln
    - **Nigeria:** €21.8 mln
  - **Other EU:** €79 mln
    - **China (incl. Hong-Kong):** €63.8 mln
    - **South Korea:** €63.8 mln
    - **Vietnam:** €63.8 mln
    - **Other:** €63.8 mln
- **Other:** €61 mln
  - **EU-28:** €61 mln
  - **Third countries:** €61 mln
    - **China (incl. Hong-Kong):** €50.1 mln
    - **South Korea:** €50.1 mln
    - **Vietnam:** €50.1 mln
  - **Other EU:** €61 mln
    - **China (incl. Hong-Kong):** €49.8 mln
    - **South Korea:** €49.8 mln
    - **Vietnam:** €49.8 mln

**Main destinations Dutch trade 2017**

- **Cheese**
  - **EU:** 771.7 million kg, index (2016=100)
    - **Third countries:** 140.9 million kg, index: 102.2
      - **Japan:** 29.6 million kg, index: 126.7
      - **USA:** 14.7 million kg, index: 90.6
      - **Mexico:** 9.5 million kg, index: 78.7
      - **Chile:** 8.0 million kg, index: 693.2
      - **Indonesia:** 2.6 million kg, index: 116.7
    - **Other:** 71.1 million kg, index: 83.7
  - **Total:** 912.6 million kg, index: 100.0

- **Butter and butteroil**
  - **EU:** 269.8 million kg, index (2016=100)
    - **Third countries:** 28.2 million kg, index: 77.9
      - **Indonesia:** 2.6 million kg, index: 116.7
      - **Mexico:** 9.5 million kg, index: 78.7
      - **Iran:** 2.5 million kg, index: 225.6
      - **Japan:** 2.4 million kg, index: 73.1
      - **Chile:** 8.0 million kg, index: 693.2
      - **China:** 2.4 million kg, index: 73.1
    - **Other:** 15.8 million kg, index: 67.4
  - **Total:** 298.0 million kg, index: 98.0

- **Skimmed milk powder**
  - **EU:** 48.2 million kg, index (2016=100)
    - **Third countries:** 78.0 million kg, index: 141.9
      - **Thailand:** 8.0 million kg, index: 109.6
      - **Algeria:** 28.8 million kg, index: 395.0
      - **Indonesia:** 7.3 million kg, index: 218.4
      - **Vietnam:** 6.7 million kg, index: 73.1
    - **Other:** 42.9 million kg, index: 145.0
  - **Total:** 126.3 million kg, index: 124.8

- **Non-skimmed milk powder**
  - **EU:** 45.0 million kg, index (2016=100)
    - **Third countries:** 149.5 million kg, index: 102.0
      - **Algeria:** 7.7 million kg, index: 116.6
      - **Saudi Arabia:** 7.7 million kg, index: 116.6
      - **Nigeria:** 10.1 million kg, index: 171.8
      - **Philippines:** 6.6 million kg, index: 158.8
    - **Other:** 72.7 million kg, index: 77.8
  - **Total:** 194.5 million kg, index: 98.9

**Source:** Statistics Netherlands (CBS), Eurostat

*Whey and whey products, fermented products and products with milk constituents
**Position of Dutch dairy exports on the world market 2017**

Export shares of the most important dairy exporting countries (total world trade 2017: 73.5 billion kg milk equivalent)

- **United Kingdom**: 5%
- **Belgium**: 20%
- **Ireland**: 7%
- **Italy**: 5%
- **Denmark**: 4%
- **Poland**: 4%
- **Other**: 8%
- **France**: 8%
- **Germany**: 40%

**Import value 2017**: € 3.7 billion

**Dutch dairy in figures 2017**

- **Imports**
  - **Countries of origin of Dutch imports**
    - Germany
    - France
    - United Kingdom
    - Belgium
    - Poland
    - Ireland
    - Denmark
    - Other

**EU-28 export cheese 2017, by type**

<table>
<thead>
<tr>
<th>Cheese type</th>
<th>EU</th>
<th>NL</th>
<th>%NL of EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheddar</td>
<td>7.5</td>
<td>0.0</td>
<td>1%</td>
</tr>
<tr>
<td>Edam</td>
<td>1.3</td>
<td>1.0</td>
<td>78%</td>
</tr>
<tr>
<td>Gouda</td>
<td>10.3</td>
<td>7.7</td>
<td>75%</td>
</tr>
<tr>
<td>Maasdam</td>
<td>0.2</td>
<td>0.2</td>
<td>92%</td>
</tr>
<tr>
<td>Mozzarella</td>
<td>1.4</td>
<td>0.0</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>136.3</td>
<td>7.2</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>156.9</strong></td>
<td><strong>16.1</strong></td>
<td><strong>10%</strong></td>
</tr>
</tbody>
</table>

**Central and South America**

<table>
<thead>
<tr>
<th>Cheese type</th>
<th>EU</th>
<th>NL</th>
<th>%NL of EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheddar</td>
<td>6.4</td>
<td>0.1</td>
<td>2%</td>
</tr>
<tr>
<td>Edam</td>
<td>3.6</td>
<td>3.3</td>
<td>92%</td>
</tr>
<tr>
<td>Gouda</td>
<td>34.2</td>
<td>21.2</td>
<td>62%</td>
</tr>
<tr>
<td>Maasdam</td>
<td>1.1</td>
<td>1.1</td>
<td>97%</td>
</tr>
<tr>
<td>Mozzarella</td>
<td>3.1</td>
<td>0.0</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>18.1</td>
<td>2.8</td>
<td>16%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>66.5</strong></td>
<td><strong>28.4</strong></td>
<td><strong>43%</strong></td>
</tr>
</tbody>
</table>

**Asia**

<table>
<thead>
<tr>
<th>Cheese type</th>
<th>EU</th>
<th>NL</th>
<th>%NL of EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheddar</td>
<td>35.0</td>
<td>3.8</td>
<td>11%</td>
</tr>
<tr>
<td>Edam</td>
<td>5.3</td>
<td>3.3</td>
<td>62%</td>
</tr>
<tr>
<td>Gouda</td>
<td>49.7</td>
<td>35.3</td>
<td>71%</td>
</tr>
<tr>
<td>Maasdam</td>
<td>1.0</td>
<td>0.3</td>
<td>28%</td>
</tr>
<tr>
<td>Mozzarella</td>
<td>70.3</td>
<td>5.5</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>172.3</td>
<td>6.8</td>
<td>4%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>333.6</strong></td>
<td><strong>54.9</strong></td>
<td><strong>14%</strong></td>
</tr>
</tbody>
</table>

**Africa**

<table>
<thead>
<tr>
<th>Cheese type</th>
<th>EU</th>
<th>NL</th>
<th>%NL of EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheddar</td>
<td>28.5</td>
<td>3.0</td>
<td>11%</td>
</tr>
<tr>
<td>Edam</td>
<td>13.6</td>
<td>12.2</td>
<td>90%</td>
</tr>
<tr>
<td>Gouda</td>
<td>6.1</td>
<td>3.9</td>
<td>63%</td>
</tr>
<tr>
<td>Maasdam</td>
<td>4.2</td>
<td>4.1</td>
<td>96%</td>
</tr>
<tr>
<td>Mozzarella</td>
<td>5.0</td>
<td>0.0</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>39.8</td>
<td>1.6</td>
<td>4%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>97.3</strong></td>
<td><strong>24.9</strong></td>
<td><strong>26%</strong></td>
</tr>
</tbody>
</table>

**Oceania**

<table>
<thead>
<tr>
<th>Cheese type</th>
<th>EU</th>
<th>NL</th>
<th>%NL of EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheddar</td>
<td>2.4</td>
<td>0.9</td>
<td>38%</td>
</tr>
<tr>
<td>Edam</td>
<td>1.5</td>
<td>1.0</td>
<td>67%</td>
</tr>
<tr>
<td>Gouda</td>
<td>1.0</td>
<td>1.0</td>
<td>96%</td>
</tr>
<tr>
<td>Maasdam</td>
<td>1.6</td>
<td>1.5</td>
<td>97%</td>
</tr>
<tr>
<td>Mozzarella</td>
<td>1.7</td>
<td>0.0</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>25.3</td>
<td>2.0</td>
<td>8%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>33.5</strong></td>
<td><strong>6.4</strong></td>
<td><strong>19%</strong></td>
</tr>
</tbody>
</table>

**Imports**

- **Countries of origin of Dutch imports**
  - Germany
  - France
  - United Kingdom
  - Belgium
  - Poland
  - Ireland
  - Denmark
  - Other

**Butter and butteroil**

- **2010**: 0
- **2015**: 0
- **2016**: 0
- **2017**: 0

**Cheese**

- **2010**: 0
- **2015**: 0
- **2016**: 0
- **2017**: 0

**Milk and cream (in small packages for consumers)**

- **2010**: 0
- **2015**: 0
- **2016**: 0
- **2017**: 0

**EU-28 export cheese 2017, by type**

- **Dutch export to third countries**: 2.9 billion kg
  - 3.4 billion kg world trade: 5.3%

**Source:** Statistics Netherlands (CBS), Eurostat

---

**Other European countries**

<table>
<thead>
<tr>
<th>Cheese type</th>
<th>EU</th>
<th>NL</th>
<th>%NL of EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheddar</td>
<td>5.4</td>
<td>1.8</td>
<td>33%</td>
</tr>
<tr>
<td>Edam</td>
<td>11.1</td>
<td>1.1</td>
<td>9%</td>
</tr>
<tr>
<td>Gouda</td>
<td>15.2</td>
<td>1.9</td>
<td>12%</td>
</tr>
<tr>
<td>Maasdam</td>
<td>4.7</td>
<td>2.6</td>
<td>54%</td>
</tr>
<tr>
<td>Mozzarella</td>
<td>14.3</td>
<td>0.0</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>94.9</td>
<td>2.5</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>145.7</strong></td>
<td><strong>9.7</strong></td>
<td><strong>7%</strong></td>
</tr>
</tbody>
</table>

**Source:** Eurostat

---

**Countries of origin of Dutch dairy exports on the world market 2017**

- **Total EU export of cheese**: 835 million kg
  - **o.w. Netherlands**: 141 million kg (17%)

**Source:** Statistics Netherlands (CBS), Eurostat

---

**EU-28 export cheese 2017, by type**

- **North America**
  - **Total EU export of cheese**: 835 million kg
    - **o.w. Netherlands**: 141 million kg (17%)
Consumption

Dairy is an important part of the Dutch traditional diet. Milk, cheese, yogurt and dairy desserts continue to be part of the daily diet of many people in the Netherlands. The Netherlands Nutrition Centre has acknowledged the fact that dairy is healthy by giving it a prominent place in the Wheel of Five, a tool used to support education about healthy eating.

The share of dairy in Dutch household spending on food and non-alcoholic drinks has been more or less stable at 14% for many years. In 2016, this represented about € 4.9 billion, or 1.6% of total consumer spending.

Since long, per capita cheese consumption in the Netherlands has stayed above the European average. On average, the Dutch eat about 20 kg of cheese per year.

Consumption spending of Dutch households 2016

<table>
<thead>
<tr>
<th>Category</th>
<th>2016 Spending (£ billion)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total consumption spending</td>
<td>€ 310.7</td>
</tr>
<tr>
<td>Food and non-alcoholic beverages</td>
<td>€ 35.6</td>
</tr>
<tr>
<td>Meat and meat products</td>
<td>€ 6.9</td>
</tr>
<tr>
<td>Dairy, eggs, oil and fats</td>
<td>€ 4.9</td>
</tr>
<tr>
<td>Other foods</td>
<td>€ 9.4</td>
</tr>
<tr>
<td>Bread and bakery products</td>
<td>€ 7.2</td>
</tr>
<tr>
<td>Vegetables and fruit</td>
<td>€ 7.2</td>
</tr>
</tbody>
</table>

source: Statistics Netherlands (CBS)

Dutch household consumption of cheese

<table>
<thead>
<tr>
<th>Cheese Type</th>
<th>2016 Consumption (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goudse (50.4%)</td>
<td></td>
</tr>
<tr>
<td>Edammer (0.6%)</td>
<td></td>
</tr>
<tr>
<td>Other domestic natural cheese (25.5%)</td>
<td></td>
</tr>
<tr>
<td>Fresh (7.2%)</td>
<td></td>
</tr>
<tr>
<td>Soft (5.6%)</td>
<td></td>
</tr>
<tr>
<td>Other (7.3%)</td>
<td></td>
</tr>
</tbody>
</table>

source: GfK

Marketing channels Dutch household consumption cheese (%)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>79.6</td>
<td>84.8</td>
<td>88.6</td>
<td>90.1</td>
<td>90.8</td>
</tr>
<tr>
<td>Markets</td>
<td>9.1</td>
<td>7.9</td>
<td>5.6</td>
<td>4.4</td>
<td>4.2</td>
</tr>
<tr>
<td>Fresh speciality stores</td>
<td>7.0</td>
<td>3.9</td>
<td>2.7</td>
<td>2.6</td>
<td>2.4</td>
</tr>
<tr>
<td>Other outlets</td>
<td>4.3</td>
<td>3.4</td>
<td>3.1</td>
<td>2.9</td>
<td>2.7</td>
</tr>
</tbody>
</table>

source: GfK
Organisations

Dairy sector related organisations
The Dutch dairy sector is characterised by a high degree of organisation. Each segment of the production chain has its own organisation(s) to represent its interests. A large proportion of the dairy farmers are represented by the Dutch Federation of Agriculture and Horticulture (LTO Nederland), in particular by the LTO Dairy Committee, while there is also the Dutch Dairy Farmers Union (NMV). Industry is represented by the Dutch Dairy Association (NZO), traders by the organisation of Dutch Dairy Traders (Gemzu) and retailers by the Dutch Food Retail Association (CBL).

Chain organisation ZuivelNL
At the initiative of NZO and LTO the private chain organisation ZuivelNL was established in January 2014. ZuivelNL is an association formed by NZO, LTO and NMV in which other organisations linked to the dairy sector can participate. The mission of ZuivelNL is to strengthen the Dutch dairy supply chain with respect to the environment and the interests of society. ZuivelNL is active in fields where cooperation between the segments of the dairy sector will create added value. The ZuivelNL programme of work focuses on the following areas:

- **Food safety**
  Monitoring and research of raw milk quality

- **Animal health**
  Monitoring, research and prevention of animal disease

- **Sustainability**
  Sustainable Dairy Chain (Duurzame Zuivelketen) aims to make the Dutch dairy sector world leader in sustainability

- **Research & innovation**
  Applied and strategic research in the interest of dairy farmers, including knowledge exchange and innovation

- **Labour issues**
  Technical knowledge retention, working environment

- **Export**
  Veterinary issues, trade regulations and foreign market access, normalisation

- **NNC-IDF**
  Netherlands National Committee of the International Dairy Federation (IDF)

- **Market information**
  Commission Official Dutch Dairy Quotations, international milk price comparison, statistics

- **Education**
  Websites on dairy education, teaching materials, farm visits

<table>
<thead>
<tr>
<th>Primary sector</th>
<th>Organisation</th>
<th>Description</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>LTO Nederland</td>
<td>Dutch Federation of Agriculture and Horticulture: organisation for employers and employees in the agricultural sector</td>
<td><a href="http://www.lto.nl">www.lto.nl</a></td>
<td></td>
</tr>
<tr>
<td>NMV</td>
<td>Dutch Dairy Farmers Union: organisation for the interest of dairy farmers</td>
<td><a href="http://www.nmv.nu">www.nmv.nu</a></td>
<td></td>
</tr>
<tr>
<td>BBZ</td>
<td>Farmhouse and Artisan Cheese and Dairy Producers: organisation for on-farm processors, active in defending the interests of its members and in product promotion</td>
<td><a href="http://www.boerderijzuivel.nl">www.boerderijzuivel.nl</a></td>
<td></td>
</tr>
<tr>
<td>NZO</td>
<td>Dutch Dairy Association: association of the Dutch dairy industry</td>
<td><a href="http://www.nzo.nl">www.nzo.nl</a></td>
<td></td>
</tr>
<tr>
<td>Gemzu</td>
<td>Dutch Dairy Traders: umbrella organisation for dairy traders and other affiliated associations</td>
<td><a href="http://www.gemzu.nl">www.gemzu.nl</a></td>
<td></td>
</tr>
<tr>
<td>CBL</td>
<td>Dutch Food Retail Association: association for supermarkets and food service companies</td>
<td><a href="http://www.cbl.nl">www.cbl.nl</a></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other categories</th>
<th>Organisation</th>
<th>Description</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZuivelNL</td>
<td>Dairy chain organisation: association in which LTO, NMV and NZO collaborate on several dairy related themes where and when this is considered of added value to the dairy sector</td>
<td><a href="http://www.zuivelnl.org">www.zuivelnl.org</a></td>
<td></td>
</tr>
<tr>
<td>COKZ</td>
<td>The Netherlands Controlling Authority for milk and milk products: implementing organisation for control, specialized in quality assurance in the dairy chain</td>
<td><a href="http://www.cokz.nl">www.cokz.nl</a></td>
<td></td>
</tr>
<tr>
<td>QLIP</td>
<td>Private organisation for analysis and certification in the dairy chain and agrofood sector</td>
<td><a href="http://www.qlip.nl">www.qlip.nl</a></td>
<td></td>
</tr>
<tr>
<td>GD</td>
<td>Leading Dutch animal health and animal production organisation, active in a.o. animal disease control programmes</td>
<td><a href="http://www.gdanimalhealth.com">www.gdanimalhealth.com</a></td>
<td></td>
</tr>
<tr>
<td>Wageningen UR</td>
<td>Research organisation active in a.o. research on various dairy farming related themes</td>
<td><a href="http://www.wageningenur.nl">www.wageningenur.nl</a></td>
<td></td>
</tr>
<tr>
<td>NIZO Food Research</td>
<td>Research institute for a.o. (dairy)product technology and milk quality</td>
<td><a href="http://www.nizo.com">www.nizo.com</a></td>
<td></td>
</tr>
<tr>
<td>RVO</td>
<td>Netherlands Enterprise Agency (RVO): part of the Ministry of Economic Affairs, which focuses on business support</td>
<td><a href="http://www.rvo.nl">www.rvo.nl</a></td>
<td></td>
</tr>
<tr>
<td>IDF</td>
<td>The International Dairy Federation (IDF) forms a global expert network active in nearly all fields of relevance to dairy</td>
<td><a href="http://www.fil-idf.org">www.fil-idf.org</a></td>
<td></td>
</tr>
</tbody>
</table>