DATA SERVICES AND PRODUCT LIST 2023

IFCN
Dairy Data • Knowledge • Inspiration

The Dairy Research Network
Helping people in the dairy world to make better decisions
About IFCN
The IFCN is a global network for Dairy Economic Research and Consultancy in the supply chain. As a leading knowledge and service provider the IFCN focuses on milk production, milk prices and other dairy related topics. Its economic models and standardisation methods ensure comparability between countries and provide a global picture with regional insights. Recognizing the complex nature and the rapid pace of change in the dairy world, IFCN is guided by the mission:

“We help people in the dairy world with dairy data, knowledge and inspiration to make better decisions”

Core Competence
The IFCN consists of two networks, dairy researchers and companies from the dairy chain. IFCN’s core competence lies in connecting the various actors and creating a platform of knowledge and discussion about dairy economic topics. In over 20 years, we have been able to create trust among all stakeholders and, together with the analysis team in Germany, developed an ongoing system for knowledge creation.

Core Values
Trust and confidence are the keys to an operational network and the exchange of information. The IFCN is independent of third parties and a politically neutral provider of knowledge. Truth and transparency mean for the IFCN that we describe realities and give advice without hidden agendas. The IFCN and all of its partners commit not to be involved in discussions or activities that may violate applicable competition law.
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The Dairy Research Network
Helping people in the dairy world to make better decisions
Today, the dairy world serves over 7 billion consumers and provides livelihood for about 1 billion people who live on dairy farms. The key challenges for dairy stakeholders lie in the complexity of the sector and the high rate of change in a globalized world. More than 140 dairy related companies are collaborating with IFCN, a global dairy research network that helps customers to improve decision-making. Globally comparable economic data for dairy products and forecasts have been used for over 20 years to better understand the dairy world.

### Partnership Benefits

- Global holistic picture of the dairy world
- Networking with your peers & companies
- Learning and capacity building

### Data Benefits

- World class dairy business intelligence
- Better decisions based on better analysis
- Better data: comparable, global & real time

### IFCN Partnership Packages

<table>
<thead>
<tr>
<th>IFCN Partnership Packages</th>
<th>Your benefit</th>
<th>Basic</th>
<th>Premium</th>
<th>Ultimate*</th>
</tr>
</thead>
<tbody>
<tr>
<td>IFCN Dairy Report, hard copies and as pdf file</td>
<td>Coverage of 125 countries key dairy economic indicators in Excel database</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>IFCN Monthly Webinar &amp; Newsletter</td>
<td>The latest sector news at your finger tips including presentations and recordings</td>
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<td>✔️</td>
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</tr>
<tr>
<td>Logo positioning &amp; IFCN Hotline</td>
<td>Be visible on the IFCN Publications and Website; Remarks for urgent questions</td>
<td>✔️</td>
<td>✔️</td>
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<tr>
<td>IFCN Supporter Conference**</td>
<td>Be part of the annual conference and receive the content presentations</td>
<td>One seat</td>
<td>Two seats</td>
<td>Three seats</td>
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<tr>
<td>IFCN Workshop &amp; other events</td>
<td>Be part of the Data Analysis Workshop and other insightful events**</td>
<td>—</td>
<td>✔️</td>
<td>✔️</td>
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</tbody>
</table>

**Access to IFCN Data Services**

- Access to the Standard IFCN Data Delivery Package (.xlsx or .csv formats)***

*IFCN reserves the right to adjust the final partnership package and to define usage rights for the legal entities based on the IFCN terms and conditions.

**Besides the Data Analysis Workshop which is free of charge for all partners, some events are paid and Premium and Ultimate partners are getting a discount for those events.

***More information about the Standard IFCN Data Delivery Packages is provided on page 7.
### P IFCN Partnership Package

<table>
<thead>
<tr>
<th>Package</th>
<th>Description</th>
<th>Basic</th>
<th>Premium</th>
<th>Ultimate*</th>
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</table>
| P5 | IFCN Supporter Partnership  
Dairy Report, Supporter Conference, Newsletter, Hotline, Logo positioning and  
World Milk Price Update Webinar | 7,000 | 10,000+ | 31,000 |

### D IFCN Dairy Data

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<td>Dairy Sector</td>
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<td>D3.2</td>
<td>IFCN Annual Dairy Sector - with IFCN Long-term Dairy Outlook - ENHANCED</td>
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<td>D3.4.0</td>
<td>IFCN Monthly Real Time Data - on production, prices and milk feed price ratio - ENHANCED</td>
<td>8,000</td>
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<td>D3.4.1</td>
<td>IFCN Monthly Real Time Farm Economics - available extension to D3.4.0</td>
<td>2,000</td>
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<tr>
<td>D3.4.2</td>
<td>IFCN Dairy World in 10 minutes - Latin American focus*****</td>
<td>on request</td>
<td>on request</td>
<td>on request</td>
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<tr>
<td>D3.5</td>
<td>IFCN Short-term Dairy Outlook - NEW*****</td>
<td>on request</td>
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<td>D3.7</td>
<td>IFCN Annual Farm Structure Data - with time series and forecast***</td>
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<td>IFCN Top Milk Processor Data</td>
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<td>D5.1</td>
<td>IFCN Farm Economic Data - with time series &amp; Farm Feeding System Data</td>
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### K IFCN Knowledge

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<td>Reports</td>
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<tr>
<td>K1.2</td>
<td>IFCN Dairy Report - hard copy****</td>
<td>Free</td>
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<td>IFCN Presentation</td>
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<td>On request</td>
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<td>IFCN Company Workshop**</td>
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<td>IFCN Dairy Outlook Workshop - NEW</td>
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### I IFCN Inspiration

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<th>Ultimate*</th>
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<td>Networking and Conferences</td>
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<td>IFCN Supporter Conference**, additional seats on request</td>
<td>1 seat</td>
<td>2 seats</td>
<td>3 seats</td>
</tr>
<tr>
<td>I1.8</td>
<td>IFCN Workshops**</td>
<td>On request</td>
<td>Free</td>
<td>Free</td>
</tr>
<tr>
<td>I1.9</td>
<td>IFCN Market Intelligence Training*****</td>
<td>1,200</td>
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<td>IFCN Emerging Dairy Regions Forum**</td>
<td>Free</td>
<td>Free</td>
<td>Free</td>
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<td>I1.11</td>
<td>IFCN Scenario Building Workshop - NEW</td>
<td>On request</td>
<td>On request</td>
<td>On request</td>
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<td>I2</td>
<td>Hosting and Sponsorship of IFCN Events</td>
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<tr>
<td>I2.5</td>
<td>IFCN Hosting and Sponsor Package for IFCN Events</td>
<td>3,000 - 40,000</td>
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<tr>
<td>I3</td>
<td>Research and Consulting Projects</td>
<td></td>
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<tr>
<td>I3.1</td>
<td>IFCN Research and Consulting - on specific topics</td>
<td>On request</td>
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</table>

**Status: July 29, 2022**

You are purchasing annual using rights of IFCN Data Services and Products.

All content is exclusively intended for confidential and internal use by our partners.

The using right of this data product is only valid during the calendar year of purchase.

All prices are in Euro excluding VAT or other taxes (if applicable).

*IFCN reserves the right to adjust the final partnership package and to define usage rights for the legal entities based on the IFCN terms and conditions.

** Due to the effects of the COVID-19 situation we are considering to change the format of the conferences and workshops. Our goal is to combine the best of both worlds of a live event and an online conference.

***Product can be bought as an extension to the IFCN Annual Dairy Sector Data D3.2 with a 75% discount (price in EUR - 3,000).

****The shipping of IFCN Dairy Reports incurs additional costs. Additional copies cost 200 EUR.

*****Additional IFCN services which are not included in any partnership package and requiring the indicated fee.
P5 - IFCN Basic Partnership

IFCN helps people in the dairy world to make better decisions. IFCN provides globally comparable data, outstanding knowledge and inspiration. With our core competencies in the fields of milk production, milk prices and related economic topics, we bring market intelligence, data, knowledge and inspiration to all members in the network. More than 140 dairy related companies and organisations support the IFCN Dairy Research Network and use the knowledge to solve challenges in the dairy world more efficiently. IFCN has innovative ways to share the knowledge with their partners and with the dairy world as a whole. IFCN Events provide opportunities to network with your peers and companies in the supply chain.

MAIN BENEFITS OF THE PRODUCT

- The global holistic picture of the dairy world for better strategic decisions
- Access to key people and companies driving the dairy sector forward to gain synergies
- Access to global comparable dairy data which saves data mining costs and leads to better decision making.

KEY SERVICES & DELIVERIES

1. IFCN Dairy Report: 5 hard copies and a digital copy in pdf format
2. IFCN Global Dairy Sector Database on the key variables of country profile data
3. IFCN Presentations after each conference, PDF copy
4. IFCN Newsletter: Monthly updates with IFCN insights (video format)
5. Logo positioning: In the Dairy Report, the World Dairy Map and in digital materials
6. E-mail hotline: Remarks and first suggestions for urgent questions
7. IFCN Supporter Conference: One complimentary seat
8. IFCN World Milk Price Update Webinar
9. IFCN Publications: Information and access to all IFCN publications

TECHNICAL DETAILS

- Format: Reports in PDF & recorded audio file, event participation, data in .xlsx or .csv format
- Delivery: Annual data, reports & monthly webinars via IFCN Portal, event participation
- Coverage: 125 countries included in the analysis
- Content: Global dairy economics related topics
- Price: 7,000 EUR / year

Find more details:
dairyreport.online/partnership
IFCN Market Intelligence Services – a three phase approach

Market Intelligence Block 1
Be IFCN Partner – Basic level
The first level of market intelligence aims to focus on the industry via a holistic view. The goal is to provide support to IFCN Basic level partners with globally comparable data to make better strategic decisions and save data mining costs. Networking with the key people from agri-business companies to gain synergies is the essential value of this block.

Market Intelligence Block 2
Use IFCN Dairy Data services
IFCN Dairy Data and analysis drive today’s and tomorrow’s success. Professionalize your company’s data management with highly precise IFCN Data. IFCN Data is reliable and comparable, saves company resources for data collection and is a broad basis for deep strategic analysis in your business.
The key strengths of IFCN Data are

- Accuracy
- Completeness
- Timeliness

Market Intelligence Block 3
Consultancy, Projects, Company workshop
The third block offers customized and applicable consultancy to your company’s specific needs. These solutions are based on state-of-the-art knowledge and experience.

Projects:
- "What if" analysis for farm input companies
- Exploring new markets for milk processors
- Research for new product developments

Consultancy for specific topics:
- Farming economics and its impacts on your markets
- Global market development and sustainability

Company workshops:
- Tailor-made presentations at your company events
- Company specific workshops on desired topics
- Professionalizing your market intelligence processes and projects
We are happy to welcome new companies and institutions to the IFCN Network 2022!

Agribusiness companies:

- Mondelez International
  - Snacking Made Right
- Vion
  - Food Group
- BouMatic
  - For the life of your dairy
- Leiber
  - Excellence in Yeast

Institutional Partners:

- copa cogeca
  - European farmers
  - European agri-cooperatives

More than 140 dairy related companies use the data and knowledge as exclusive members of the IFCN network for their strategic planning.

Find more details:

- linkedin.com/company/ifcn
- ifcndairy.org
dairyreport.online
IFCN DAIRY DATA

The Dairy Research Network
Helping people in the dairy world to make better decisions
D3.2 IFCN Annual Dairy Sector Data with Long-term Dairy Outlook

D3.2 provides the dairy outlook until 2050. This comprehensive data product supports long-term strategic business decisions with comparable data at country level. It contains: timeline data since 1996, regional data and the IFCN Long-term Dairy Outlook until 2050. Standardised and quality-checked country and regional data increase efficiency in business development by shortening the time for data mining.

**MAIN BENEFITS OF THE PRODUCT**

- Get a holistic picture of the dairy sector and share the results with colleagues
- Increase business analysis efficiency with timely and accurate value chain data
- Save time and focus on business planning with up-to-date Outlook Data

**TECHNICAL DETAILS**

- **Format:** Excel, CSV & PDF files
- **Delivery:** in March
- **Coverage:** +200 countries, about 99% of world milk supply
- **Data period:** 1996 - current year and forecast until 2050 for core variables
- **Price:** 16,000 EUR / year*

*The usage right for this data product is only valid during the calendar year of purchase

**KEY VARIABLES**

- Milk supply & demand with outlook
- Dairy farm & cow numbers with outlook
- Total dairy trade & stocks
- Milk & feed prices
- Milk production by region
- Dairy processing profile
- Dairy commodity trade & consumption
- **NEW:** CO₂ emissions per kg milk produced

**World milk production**

in mill. tonnes SCM (Solid Corrected Milk), 4% fat, 3.3% protein

- Milk from other animals
- Informal market (cow & buffalo)
- Household consumption/ on farm use (cow & buffalo)
- Milk delivered to dairies (cow & buffalo)

**Chinese milk balance with forecasts until 2050**

in mill. tonnes ME (milk equivalents), 4% fat and 3.3% protein

* Did you know? More than 40% of milk produced never reaches dairy processors
Save time by streamlining your data sourcing and keep on top of market trends. This real-time product provides monthly data on milk production, milk & feed prices and describes the current situation and ongoing developments of the dairy market. It enables you to optimise short-term operational business processes on a global and country level. The key market insights empower you to interpret the up-to-date databases for faster decision making.

**MAIN BENEFITS OF THE PRODUCT**

- **Improve your workflow** using the real-time milk supply and price data for insights and forecasting
- **Gain time preparing for the next dairy market shocks** with precise price transmission periods
- **Receive the data and insights in the best format** for your end use

**TECHNICAL DETAILS**

- **Format**: Excel, CSV & PDF files
- **Delivery**: Middle of every month
- **Coverage**: 65 countries, 92% of world milk supply
- **Data period**: 2006 - current month
- **Price**: 8,000 EUR / year*

*The usage right for this data product is only valid during the calendar year of purchase

**KEY VARIABLES**

- Monthly milk & feed prices
- Monthly milk supply
- EU-28 & US dairy stocks
- Fat and protein content of milk
- Market report and charts
- **NEW**: Annual milk production data break down to quarterly data

**Change in Brazilian milk production on monthly basis**

**Did you know?**

Brazilian milk supply declined sharply in 2021/22, as farmers’ profitability was under pressure due to unfavourable weather conditions and a huge increase in production costs, which could not be covered by current historically high milk prices.
D3.4.1 covers the latest monthly farmers’ margin data from premium sources. This real-time product provides farm economic data with easy-to-understand traffic light visualization. It comprises the farm economics data for 65 countries and thus enables a comparison to be made of how quickly a country’s farm economics react after a change in the world prices. Since 2015, this product has been available as an extension to the IFCN Monthly Real Time (D3.4.0) product.

**MAIN BENEFITS OF THE PRODUCT**

- Get a one click solution for a **reliable view of farmers’ margin status**
- Be “the one truth point” in your team to judge the national farmers’ **“mood”**
- **Connect your sales or sourcing** goals with real-time farm economic data

**TECHNICAL DETAILS**

- **Format:** Excel, CSV & PDF files
- **Delivery:** Middle of every month
- **Coverage:** 65 countries, 92% of world milk supply
- **Data period:** 2006 - current month
- **Price**: 2,000 EUR as extension of D3.4.0
  *The usage right for this data product is only valid during the calendar year of purchase*

**KEY VARIABLES**

Additionally to variables from D3.4:

- Margin over compound feed costs
- Judgement of farm economics
- From world margin to country milk supply change

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**Monthly German milk and feed prices costs**

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<thead>
<tr>
<th>Year</th>
<th>National farm gate milk price</th>
<th>National feed price</th>
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</table>

**German margin over compound feed costs**

<table>
<thead>
<tr>
<th>Year</th>
<th>Margin over compound feed costs (0.3 kg/kg milk)</th>
<th>Bound - average 2007-2021</th>
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</thead>
<tbody>
<tr>
<td>2007</td>
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**Did you know?**

As farm economics stimulate or diminish milk supply, a change in margins can show an impact on production with a 4-6 month reaction lag.
This video newsletter offers you insights into global developments in the dairy sector and their links and impacts on the Latin American dairy market.

Together with our local IFCN Research partners, we interpret and summarise the latest developments on a monthly basis and provide indications of future market changes. The drivers of the global dairy industry operate differently in each world region, and it is therefore interesting to look at the impact on Latin America, which is a particularly vast, diverse and commodity-rich region. For this reason, we have developed a newsletter that serves as an easy-to-understand and targeted link between Latin America and the global value chain.

**MAIN BENEFITS OF THE PRODUCT**

- Interpreting global developments and their impact on the Latin American dairy sector
- Understanding the dairy world without complex analysis
- Key ideas & messages for decision making at the local level

**TECHNICAL DETAILS**

- **Format:** Video, PDF file in Spanish language
- **Delivery:** Monthly
- **Coverage:** Latin American countries & world level
- **Price:** on request

**KEY VARIABLES**

- Monthly milk & feed price
- Monthly milk supply
- Milk:feed price ratio / farm economics

**Map presents:** Milk : Feed Price Ratio

**Relación de Precios Concentrado: Leche**

![Map showing milk : feed price ratio in Latin American countries](image)
IFCN provides you a new outlook service which is providing you with insights about the future developments for the key dairy markets.

IFCN has developed a unique holistic approach based on data-driven and critical thinking, not only for farm-gate milk prices, farm economics and milk supply, but also for dairy commodity prices. It enables you to redefine, forecast and manage your operational and tactical planning, e.g. as guidance for pricing strategies or to forecast your own sales figures.

As the world is changing fast, and milk supply is not a fixed variable anymore, it is important to understand the whole dairy price and production cycle – especially the impact of farm economics – to make precise dairy market outlooks.

**MAIN BENEFITS OF THE PRODUCT**

- Holistic cycle with complementary perspectives (data driven and critical thinking)
- Providing you with insights of what is driving the dairy world in the next 6 to 12 months
- Use the outlook to guide, re-fine or forecast your own sales or product pricing strategies

**TECHNICAL DETAILS**

- **Format:** Excel with data & insights
- **Delivery:** Monthly
- **Coverage:** Select out of 65 countries and 10 world regions
- **Data period:** January 2006 - current month and 6-12 months forecasts
- **Price:**
  - 1 to 5 countries or regions: 1,200 EUR / per country;
  - 6 to 10 countries: 1,000 EUR / per country;
  - more than 10 countries: 950 EUR / per country;

**KEY VARIABLES**

- Monthly milk production forecasts
- Monthly milk and feed price forecasts
- Farm economic outlook
- SMP & Butter quotation prices for EU, US, NZ
- Insights on developments

**US milk and feed prices with 6 month forecast**

in USD / 100 kg SCM or feed

<table>
<thead>
<tr>
<th>Month</th>
<th>National farm gate milk price</th>
<th>National feed price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan-17</td>
<td>40</td>
<td>20</td>
</tr>
<tr>
<td>Jan-18</td>
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<tr>
<td>Jan-19</td>
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<td>40</td>
</tr>
<tr>
<td>Jan-20</td>
<td>70</td>
<td>50</td>
</tr>
<tr>
<td>Jan-21</td>
<td>80</td>
<td>60</td>
</tr>
<tr>
<td>Jan-22</td>
<td>90</td>
<td>70</td>
</tr>
</tbody>
</table>

**Change in US milk production on monthly basis with 6 months forecast**
D3.7 IFCN Annual Farm Structure Data

Farm structure data is important for your sales planning and expansion strategies. As it offers a standardisation of the farm size classes on a global level it offers the possibility to analyse comparable herd sizes with regard to animals and farms. The timeline data and forecast up to 2030 provide a comprehensive overview of the historical and future developments of farm structures for over 80 countries. This is a great tool to segment customer groups and identify profitable target markets.

### MAIN BENEFITS OF THE PRODUCT

- **Increase the profitability of your services** by being aware of the herd size of your future customers/suppliers
- Comparable farm size **segmentation enables you to target the most suitable services** they need and can use
- **Use farm structure** forecast to identify potential market scale for the company strategy

### TECHNICAL DETAILS

- **Format**: Excel, CSV & PDF files
- **Delivery**: Annually, delivery in March
- **Coverage**: 80 countries, 95% of world milk supply
- **Data period**: 1996 - current year and forecast until 2030
- **Price**: 12,000 EUR / year* (3,000 EUR as extension to D3.2)

*The usage right for this data product is only valid during the calendar year of purchase

### KEY VARIABLES

- Farm number, Ø farm size
- National farm structure data
- IFCN Standard Herd Size Class data
- Farm structure forecast per size class
- >100 herd size class forecasts
- Comments on status and forecast data
- Improved forecast data & quality judgment
- Paper on standardisation method
- **NEW**: Regional data (NUTS2/3) added for selected countries

### D3.7 FUTURE DEVELOPMENT POINTS

- Improve data quality and alignment towards other data services
- Improving the methodology of milk production per herd size class
- Better connection of farm economic trends with farm size developments

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**Did you know?** The Danish dairy sector is showing a progressive consolidation which will continue in the future and even might speed up with new legislations

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© IFCN Data Services and Product List 2023
This IFCN product shows the largest milk processors in the world’s major milk producing countries. Sorted according to milk intake and milk turnover, this data can serve as an essential basis for market analysis and for planning product strategies. The product enables you to assess where the milk processing markets are growing and how the consolidation process of the milk processing industry is progressing.

**MAIN BENEFITS OF THE PRODUCT**

- Understand the level of milk processing capacity of top processors
- Scan potential competitors or customers and their market share
- Assessment of your own position in the market compared to the top milk processors

**TECHNICAL DETAILS**

- **Format:** Excel, CSV files
- **Delivery:** Every other year
- **Coverage:** over 50 countries, 90% of world milk supply
- **Data period:** 2008 - last available data
- **Price:** 4,000 EUR / year*

*The usage right for this data product is only valid during the calendar year of purchase

**KEY VARIABLES**

- Milk intake of top 10 processors
- Turnover in USD
- Legal ownership status
- Development of top 10 processors
- Global top 20 processors list

---

**Concentration share of TOP1, TOP3, TOP5 and TOP10 processors**

<table>
<thead>
<tr>
<th>Processor</th>
<th>Germany</th>
<th>Netherlands</th>
<th>New Zealand</th>
<th>China</th>
<th>India</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top1</td>
<td>0.12</td>
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<td>0.05</td>
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<td>0.03</td>
<td>0.02</td>
<td>0.02</td>
<td>0.01</td>
</tr>
</tbody>
</table>

**Germany milk intake of processors**

in 1,000 t milk

- Bayerische Milchindustrie eG: 837.8
- Rücker: 850
- Meierei Barmstedt: 850
- Goldsteig Käsereien Bayerwald GmbH: 860
- frischli Milchwerke GmbH: 865
- Molkerei Ammerland eG: 1599
- Arla Foods GmbH: 1741
- Unternehmensgruppe Theo Müller: 2000
- Hochwald Foods GmbH: 2278.9
- DMK Deutsches Milchkontor: 6700

**Did you know?**

Within 10 years the TOP 5 German dairy processors increased their market share from 40% to 50% on total milk delivered.
The dairy trade product contains standardised monthly trade data for 27 dairy and 3 animal feed commodities on a 6-digit HS code level. Updated quarterly, the product can provide your company with crucial knowledge about the latest global developments in dairy trade. The export and import data are standardised to milk equivalents (ME, 4% fat, 3.3% protein) for better comparison: Volume (1000 t ME).

**MAIN BENEFITS OF THE PRODUCT**

- **Get an overview** of countries active in dairy trade and their self-sufficiency status
- **Be able to analyse new export markets** better with reliable global trade data
- **Be aware of your company’s market share** within a country’s imports and exports with standardised data

**TECHNICAL DETAILS**

- **Format:** Excel files
- **Delivery:** Monthly
- **Coverage:** over 90 countries, 95% of world milk supply
- **Data period:** 2013 - latest available data
- **Price:** 8,000 EUR / year*

*The usage right for this data product is only valid during the calendar year of purchase

**KEY VARIABLES**

- Traded dairy volume in ME
- 5 dairy commodity groups
- 27 dairy products (6-digit HS codes)
- Monthly dairy trade balance
- **NEW:** Added HS code for fat-filled milk powders
- **NEW:** Feed trade data for 3 commodities (maize or corn, barley and soy bean flour and meal)
- **NEW:** Summary dashboard with the most important developments

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**Did you know?**

In 2020, the highest growth of Chinese imports was monitored in fresh products (+121%).

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**D3.9 FUTURE DEVELOPMENT POINTS**

- Integrate trade flows for specific countries and dairy commodity groups
- Get facts on the market share of top exporter/importer countries
- Improve user friendliness via different charts and maps
D5.1 IFCN Farm Economics Data & Farm Feeding System Data

If you wish to analyse how to increase farmers’ adoption of your new technologies & services, start with the IFCN Farm Economics database. This comprehensive dataset facilitates strategic decision making by presenting a unique tool for benchmarking dairy farms worldwide. Short, but thorough farm descriptions help you to find the farms/farming systems you are most interested in. The D5.1 enables you also to compare these specific farms with regard to farm economics, cost competitiveness and feeding indicators. Furthermore, key indicators to show sustainability and resilience of dairy farms around the world are included.

**Typical farm codes: DE - Germany, RS - Serbia, CN - China | example: DE-154N = German 154 - cow farm in Northern Germany

### MAIN BENEFITS OF THE PRODUCT

- Choose the most fitting and valuable services to offer via benchmarking cost and income of farms
- Set and measure farm sustainability targets of your dairy customers / suppliers in specific countries
- Better product pricing strategy in profitable locations by measuring the value of your product

### TECHNICAL DETAILS

- **Format:** Excel files,
- **Delivery:** Annually, delivery in October
- **Coverage:** over 50 countries, >170 typical farms, 89% of world milk supply
- **Data period for the time series analysis:** 2000 - last complete calendar year
- **Price:** 10,000 EUR / year*

*The usage right for this data product is only valid during the calendar year of purchase

**Cost components of production costs of the dairy enterprise**

**in USD / 100 kg SCM (Solid Corrected Milk)**

(4% fat, 3.3% protein)

- Total labour cost
- Other costs
- Total land costs
- Machinery & buildings (maintenance, depreciation, contractors)
- Feed (purchased feed, fertiliser, seed, pesticides)
- Vat & medicine, insemination
- Total capital costs

### KEY VARIABLES

- Description of typical farms analysed
- Base farm data: size, yield, system
- Typical farm economic results
- Costs components of typical farms
- Sustainability & resilience of typical farms
- Ratio composition
- Feed costs, intake and efficiency
- **NEW:** Relation between production parameters and economic indicators per world region
- **NEW:** Combining Farm Economic Data and Farm Feeding System Data into one product

### D5.1 FUTURE DEVELOPMENT POINTS

- Get a dynamic visualization of farm economics with one click
- Deeper analysis of dairy farm sustainability pillars
- Developing risk and farm management monitoring tools

**Typical farm codes: DE - Germany, RS - Serbia, CN - China | example: DE-154N = German 154 - cow farm in Northern Germany**
The Dairy Research Network
Helping people in the dairy world to make better decisions
The IFCN Dairy Report has been published for more than 20 years and has since become a standard publication for scientists and companies in the dairy sector. The report provides a global overview of macroeconomic and farm level developments. In addition, it contains 125 country profiles with valuable analysis and indicators on milk supply & processing, self-sufficiency and farm structure that can serve as a good basis for discussions and strategic decisions - for companies, institutions, and people from the research sector.

**MAIN BENEFITS OF THE PRODUCT**

- Gain insight into global dairy farm and market knowledge
- Improve your market strategy based on data with historical time series
- Visualise data with insightful charts & maps in your own custom analyses

**TECHNICAL DETAILS**

- **Format:** Hard copy, PDF, Excel file
- **Delivery:** Annually, delivery in October
- **Coverage:** 125 countries
- **Data period:** 1996 - previous year
- **Price:** 200 EUR / additional hard copy
- **Price for PDF:** 3,000 EUR / year for non-partners - free for all IFCN Partners

**KEY VARIABLES**

- Milk supply & demand
- Milk prices
- Farm economics & structure
- Typical dairy farm comparison
- Special studies on dairy economics
The top 20 Dairy Processors’ impact on the world is understated. In 2021, IFCN conducted an extended research on these processors and created the world’s first dairy processor report: a fact book that makes dairy processing companies comparable. By analysing a wider set of sources and data, it illustrates the contributions of milk processors with a focus on people, planet and profits. IFCN believes that discussions are improved when they are supported by undisputable facts.

### MAIN BENEFITS OF THE PRODUCT

- Obtain a state-of-the-art overview of the dairy processors’ progress and stated ambitions to **reduce their environmental footprint**
- **Benchmark your company** against the top 20 dairy processors
- Use facts to understand better the processors’ **relevance to feeding the world** and giving **value to farmers’ livelihood**

#### TECHNICAL DETAILS

- **Format:** PDF, Q&A session
- **Delivery:** in December, every other year
- **Coverage:** Top 20 dairy processors
- **Data period:** 2014 - previous year
- **Price:**
  - 4,400 EUR for IFCN Partners
  - 5,500 EUR for non-IFCN Partners

#### KEY VARIABLES

- **Company size:** Milk processed, net sales, employment
- **People:** Contribution to farmers, employees, consumers
- **Profit:** Net profit, taxation, payment to owners
- **Planet:** CO₂ target, decision on sustainability and carbon neutrality and planet variables like SDG commitments per company

Get your personal copy now! [www.dairyreport.online](http://www.dairyreport.online)
K4.1 IFCN Presentation

IFCN can be a valued speaker at conferences, webinars, conventions and summits. IFCN gives up-to-date insights into the development on the dairy market as well as the farm sector and can provide valuable information and key figures.

**TECHNICAL DETAILS**

- **Format:** Presentation with PDF hand-out
- **Delivery:** On demand, in-house or at IFCN
- **Duration:** 0.5 - 2 hours
- **Price:** on request

K4.2 IFCN Company Workshop

Individual workshops are an excellent way to stay informed about the latest market conditions and to work out the best benefits of IFCN data for your company. Topics, duration and structure are determined together beforehand.

**TECHNICAL DETAILS**

- **Format:** Presentation with PDF hand-out
- **Delivery:** On demand, in-house or at IFCN
- **Duration:** 3 - 8 hours
- **Content:** Tailor-made based on specific request, outcome is highly confidential
- **Price:** on request
- **Sample Topics:**
  - „Briefing general management on global dairy developments for strategic decisions“
  - „Capacity building for marketing, sales or analysis teams“
  - „Supporting the Market Intelligence set up & next steps“
  - „Business war gaming“
This webinar series is representative of our mission to help people in the dairy world to make better decisions. It was originally created to be of assistance to our supporter partners during the outbreak of the COVID-19 pandemic by providing information particularly regarding the volatility and uncertainties in the dairy market. The webinar includes updates on the world milk price and a comparison of major dairy future prices. This saves you time and enables you to be always one step ahead of the latest trends and drivers. The content-rich events are complemented by a live Q&A session.

### MAIN BENEFITS OF THE PRODUCT

- **Keep an overview of the most important market developments**
- **Better navigate** milk price trends in periods of growing uncertainty
- **Get answers to your questions** during the online session

### TECHNICAL DETAILS

- **Format:** PDF & recorded audio file
- **Delivery:** Monthly
- **Content:** World milk price & related stories
- **Duration:** 30 - 45 minutes
- **Price:** Free for IFCN Supporter Partners

### KEY FEATURES

- **The IFCN World Milk Price Indicator:** Status & Outlook
- **Trends and drivers of the world milk price**
- **Comparison of the main future price indicators for dairy products**
- **Maps & charts with key information**
The New Normal in Dairy – Milk production is no longer a fixed constant. The world is changing, and what has been true in the past may not be true in the future. In the spirit of challenges, uncertainties and curiosity of a rapidly changing world, IFCN invites you to explore options for the dairy industry’s way forward.

In this workshop you will discuss the short and medium term outlook and learn how the world of dairy is changing. This workshop is suitable for anyone who is part of the dairy value chain. You will be able to get answers to the question of whether the dairy industry will be able to satisfy current and future demand (either on the dairy commodity or on the farm input side) as well as hearing different views on the dairy future from market experts. Use this unique opportunity to discuss the future dairy world and network with stakeholders across the dairy value chain.

Main Benefits of the Product

- Get insights about the latest short-term and mid-term dairy outlook
- Improve your risk management by considering the latest and future market trends
- Validate your projections with IFCN outlooks as well as by discussing with other market experts

Example Workshop Day 1
IFCN Short-term and/or Long-term dairy outlook for requested markets

Example Workshop Day 2
Team work on specific topics

Answers and group work on topics like
- IFCN's view on the future dairy world and specific regions/markets
- How will the dairy (farm) business develop in different countries and areas?
- How will market and farm economics impact the dairy world?
- What are possible challenges and opportunities for your business?

Technical Details
- Format: Presentation with PDF reports
- Delivery: On demand, in-house or at IFCN
- Content: IFCN Outlooks and panels
- Duration: 2 days
- Price: on request
NETWORKING AND CONFERENCES

The Dairy Research Network
Helping people in the dairy world to make better decisions
This international dairy conference brings together representatives from a variety of companies from different stages of the whole dairy supply chain. Last year IFCN held its annual conference online: For the first time in IFCN history, more than 400 participants from the entire dairy supply chain gathered to discuss the status of the dairy world. IFCN data experts looked at various scenarios and, together with dairy leaders from across the globe, analysed what the world will look like after the COVID-19 crisis.

**Event host & sponsors**

- VYLA
- Cargill
- Phibro
- MADCAP
- nedap

**Main benefits of the product**

- Interacting & networking with other dairy industry peers
- Learning & exchanging ideas on current industry topics with experts
- Grow your expertise with resources compiled by experts

**Technical details**

- **Format:** Event seat with handbook*
- **Delivery:** Annually, every September
- **Content:** Customised topics in collaboration with host
- **Duration:** 2.5 days
- **Price:** Free for all IFCN Partners
- **Additional seat:** 2,500 EUR**

**Key messages**

- Milk supply & demand drivers
- World milk and feed price forecast
- Long & short-term dairy outlook
- Special topic related presentations
- Discussions & knowledge of the crowd

---

*Due to the effects of the COVID-19 situation we are considering to change the format of the conference, location and seats availability.

**Excluding travel and accommodation costs.
These workshops bring together various partner companies’ core knowledge, allowing them to share and exchange ideas with industry members on the specific workshop topic. Due to the effects of the COVID-19 situation we are considering to change the format and timing of the workshops in 2022. Our goal is to combine the best of both worlds: offline and online workshops.

### MAIN BENEFITS OF THE PRODUCT

- Interacting & networking with other **dairy industry peers**
- **Learning & exchanging** ideas on current industry topics with experts
- **Grow your expertise** with resources compiled by experts

### TECHNICAL DETAILS

- **Format:** Event seat
- **Delivery:** On request
- **Content:** Customised topics in collaboration with host
- **Duration:** 0.5 - 2 days
- **Price:** On request

### KEY MESSAGES

- Milk supply & demand drivers
- World milk and feed price forecast
- Long & short-term dairy outlook
- Special topic related presentations
- Discussions & voting
This training has a unique curriculum and is delivered by highly experienced specialists, specifically tailored to the needs of IFCN Supporter Partners and leading professionals in the world of dairy business. The training in 2021 was organized in collaboration with Dr. Erik Elgersma, Director of Strategic Analysis Services BV.

**MAIN BENEFITS OF THE PRODUCT**

- **Better competition** in a data-driven world
- Guidance towards a balanced MI-project and process portfolio
- **Ensure better value from IFCN** data services which are accessible to you

**TECHNICAL DETAILS**

- **Format:** Event seat with handbook
- **Delivery:** Annually, to be defined
- **Content:** To be defined
- **Duration:** 1 - 2 days, online (envisaged)
- **Price:** 1,200 EUR / seat

**KEY FEATURES**

- The Market Intelligence Maturity Model
- Permanent Data Collection & Dissemination
- The Market Intelligence Cycle
- Checklist for Data Collection, Analysis and Tools
- How to Turn Intelligence into Action
IFCN has taken action to provide precise information and generate knowledge related to topics of dairy development in emerging countries together with over 600 dairy experts. The first online edition of the forum focused on experiences to improve, learn and determine the best way in which to become 100% dairy self-sufficient. At this event, we considered different scenarios, had discussions with the people who are directly affected and reported on the facts about the status. The main aim of the public forum was to define relevant factors for self-sufficiency in dairy and ways to measure sustainable solutions.

**Main Benefits of the Product**

- Obtain the latest overview of the status of emerging dairy markets
- **Be part of the discussion with top-notch dairy experts** on globally relevant topics
- Improve your knowledge on “sustainable” solutions for dairy topics in these markets

**Technical Details**

| Format: Online event with presentations & recordings |
| Delivery: Annually, in November |
| Content: Customised topics in collaboration with host |
| Duration: 2 - 3 hours |
| Price: Free |

**Key Features**

- Dairy supply and demand drivers
- Special topic related presentation
- Country case studies from dairy experts
- Discussions & knowledge of the crowd
As volatility increases, it is critical to anticipate future developments, mitigate risk and understand the impacts on the dairy world as well as on your business. During such a workshop, which is tailored to the needs of your company, IFCN will provide you and your colleagues with insights what might happen in the future and how to navigate and prepare for it.

The workshop enables you to grasp essential information and different scenarios for your key focus areas e.g. domestic market, supply and demand, key farm profit margin indicators and business perspectives. Use the IFCN experience, knowledge and scenario data as a navigator, orientation guide and basis for your upcoming decision-making processes like budget planning or market development.

### MAIN BENEFITS OF THE PRODUCT

- **Navigator, orientation guide and basis** for your upcoming decision-making processes like budget planning or market development
- **Improve team capacity** to understand the uncertainties and align on the company goals
- **Understand the short- and mid-term impacts** of different scenarios for your company

### EXAMPLE FOR A 1-DAY WORKSHOP ON SCENERIO BUILDING

**IFCN Short-term and/or Long-term dairy outlook for requested markets**

Answers and group work on topics like

- IFCN’s view on the future dairy world and specific regions/markets
- How to build up scenarios for my business?
- How will the dairy (farm) business develop in different countries and areas?
- How will market developments and farm economics impact the dairy world?
- What are possible challenges and opportunities for your business?
- Which possible scenarios do we expect for the upcoming 2, 5 or 10 years concerning the product, market and sales developments?
Today the dairy world provides livelihoods for 1 billion people living on dairy farms. To be a host or sponsor is a great opportunity to gain visibility among the international leading dairy research network, either by being part of the researcher network, or by being close to decision makers of international and national dairy business companies.

**01 Be Visible**
This is a great way to demonstrate your authority as an industry expert and consequently be heard.

**02 Build Relationships**
Being under the same roof and engaging with hundreds of peers offers greater return on investment in the first place.

**03 Audience Insights**
Learn from the mix of experienced and new people presenting at the conference. Have access to post event reports.

**04 Awareness**
Generate awareness around your brand and get additional exposure through our network. Also being a less intrusive form of marketing enables event sponsorship to create trust between companies.

**05 We offer**
- Recognition as host or sponsor
- Logo positioning on banners
- Additional seats
- Participation at the think tank talks

---

**MAIN BENEFITS OF THE PRODUCT**

- **Take leadership** on the innovative topics among your industry partners
- **Promote your brand** on the stage of market leaders, competitors & researchers
- **Gain visibility in the news** by being at the forefront of relevant dairy-related topics

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### TECHNICAL DETAILS

- **Format**: Event seats*, logo positioning
- **Delivery**: Annually, each event
- **Content**: Topic related presentation
- **Materials**: Event handbook, banner
- **Price**: On request

### KEY MESSAGES

- Topic related presentation
- Recognition as host or sponsor
- Logo positioning on banners
- Additional 2 seats for hosts*
- Participation at the think tank talks

---

*Due to the effects of the COVID-19 situation we are considering to change the format of the conference, location and seats availability.
Our custom-made consultancy and research projects range from full-day workshops to short- or long-term projects, giving the opportunity to strengthen capacity building in dairy knowledge and to support in strategic planning. A specific project can save internal resources by using the knowledge and network of the IFCN.

**Main Benefits of the Product**

- Find the right milk sourcing opportunities in your future markets
- Get insights into the fitting farm model to serve or sell your products
- Measure and improve your dairy farm solutions

**Technical Details**

- **Format:** Written reports, presentation or Excel files
- **Delivery:** As defined in the project
- **Content:** Upon consultation
- **Duration:** Upon consultation
- **Price:** On request

**Confidentiality**

The content of bilateral discussions is highly confidential and will never become accessible to third parties.

IFCN reserves the right to use precompetitive information under the condition that the source remains unknown.
IFCN is continuously working on improving and offering new services within “dairy data”, “knowledge” and “inspiration”. Here we would like to give you a glimpse of our current potential research and development topics.

**Dairy World in 5 minutes**

*What is it about?*

Get dairy market insights in different languages into the most recent dairy developments, such as milk prices, farm economics and milk production on a global level as well as with a specific focus on the specific regions.

*Requested by:* Farm input companies, dairy processors, dairy farmers.

*“Break the language barrier of communication”*

**Environmental Sustainability of Dairy Farming**

*What will be the potential features?*

Get insights and data from a global tool for measuring and monitoring CO2eq emission and production on a country representative dairy farm as well as on an aggregated country level.

*Requested by:* Dairy processors, dairy unions, farm input companies, public agencies

*“You can only improve what you can measure”*

**Handle the rising complexity in a fast-changing world**

*What could it be used for?*

Stay up-to-date and monitor the latest dairy market developments and future trends with regards to milk prices, farm economics, milk production and traded dairy commodities. Get insights on potential trade flows and see how changes in milk production can impact and influence the import and export of dairy trade.

*Requested by:* Dairy processors, dairy trader/broker, farm input companies.

*“Learning fast and adopting towards the possible changes are key success factors in a competitive world and improve your risk management”*
Economic Sustainable Dairy Feeding
What could it be used for?
Validate and judge changes in feed ratios and feeding systems on the farm economic situation and its potential impact on milk production and yields as a part of your risk management process.
Requested by: Farm input companies, dairy processors, dairy farmers, public agencies

“Achieve your sustainability goals with right feeding systems”

Sustainability pillars of Dairy Farming
What could it be used for?
Validate and judge the impact of different regulations on the 3 pillars (economic, social and environmental) of dairy farming sustainability as well as the indirect impact on dairy farmers’ mood and possible milk production adjustments.
Requested by: Farm input companies, dairy processors, dairy farmers, public agencies

“Measure the mood of dairy farmers caused by different regulations”

i-FCN 2.0
What is it about?
Stay up-to-date and monitor the latest dairy market developments via IFCN Data Services and Knowledge Transfer with an interactive application and use the innovative way of sharing databases with end users.
Requested by: all dairy value chain actors, public agencies, technology start-ups

“The smartest way to access insights and data on dairy farming and national market developments”

Are you interested in a specific research topic?
Do you want to be part of the development and provide feedback?
Or do you have different ideas for future IFCN services?
Send us a message: info@ifcndairy.org
# IFCN Data Services and Product List 2022 (individual price)

## P IFCN Partnership Package

<table>
<thead>
<tr>
<th>Package</th>
<th>Basic</th>
<th>Premium</th>
<th>Ultimate*</th>
</tr>
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<tbody>
<tr>
<td>PS</td>
<td>IFCN Supporter Partnership&lt;br&gt;Dairy Report, Supporter Conference, Newsletter, Hotline, Logo positioning and World Milk Price Update Webinar</td>
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## D IFCN Dairy Data

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<th>Premium</th>
<th>Ultimate*</th>
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## I IFCN Inspiration

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**Status: July 29, 2022**

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