

Vietnam Dairy Comprehensive Report Q4.2016

<https://marketpublishers.com/r/V40B443FFB2EN.html>

Date: November 2016

Pages: 138

Price: US\$ 1,995.00 (Single User License)

ID: V40B443FFB2EN

Abstracts

Dairy are important food providing necessary nutrients for every human being. Dairy is a universal and livestock industry related production: Livestock and milk collection take place in almost every country across the world, and up to one million people participate in milk production. It is an important part of the global food system and it plays a key role in the sustainability of rural areas in particular. In fact, the dairy industry actively contributes to the economies of a number of communities, regions and countries. An increasing demand worldwide is noticeably emerging at the present, and the industry is globalizing, thus increasing the scope and intensity of the global dairy trade. However, the world's dairy industry is mainly produced in developed countries, such as America, New Zealand and is mostly exported to developing countries. In addition, the dairy industry is in shortage of supply. The motivation comes from China and Europe with annual input growth rates up to 20%.

Vietnam does not initially possess the cow raising tradition, this only emerged in Vietnam since the early of the 20th century. Up to 2015, Vietnam has more than 275 thousand units of cow and a total of 19 thousand producers. Cow raising requires capital and high technical skills, but in Vietnam, cows are mainly raised by small scale producers (less than 20 units/ producer) coupled with the lack of knowledge on raising and preventing cows from diseases, resulting in low productivity, high production cost, and unstable milk quality. According to Vietnam Industry Research and Consultant (VIRAC), West Europe has production cost from 45-55 USD. While America has the production cost at about 35-60 USD, depending on each area development. Countries like Argentina have suitable weather and big farming land, helping reducing the average cost. Cost of production in Australasia is 36.6 USD, while it is 30 -35 USD in Australia and 41-42 USD in New Zealand. The discrepancy comes from food price, land price and the revaluation of NZD recently. New Zealand used to have the most competitive price in around the year 2000 (12USD/ 100kg) but the revaluation of the currency and rising inputs price trebled the price. In general, the cost of production did not fluctuate

strongly throughout the period. Vietnam has the average cost of production because diluted raising and scale, does not achieve the economics of scale, low productivity (12-15 liters/day) and high cost of cattle-feed and veterinary. This leads to the lack of milk as input materials for milk manufacturing industry for years hence has to rely on imports.

The in-depth research “Vietnam Dairy Industry” carried out by Vietnam Industry Research and Consultant (VIRAC) illustrates the overall scenario of the dairy industry in Vietnam in order to provide an insight for a better understanding regarding the market. The report details the economic situation in general and the industry in particular with updated date and statistic until 2016, the movement of the price as well as the forecast for the upcoming future, covering all domains, including liquid milk, powdered milk, condensed milk as well as yogurt, butter and cheese. Analysis of big players in the industry is also elaborated by providing detailed financial analysis, applied technology, market share, etc. herein to help companies position and define the competitiveness in the market. For example, some typical producers are VinaMilk, TH True Milk, Nutrifood, Hanoi milk, IDP, 3A nutrition.

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