

Circular 161/18.

Ciudad de México, a 09 de octubre de 2018.

Asunto: Ranking mundial 2018 de empresas lácteas.

Estimados Afiliados:

Por considerarlo de su interés, les compartimos el ranking mundial de las 20 principales empresas procesadoras de lácteos a nivel mundial.

Este reporte publicado recientemente es elaborado por la Red de Investigación de Productos Lácteos (IFCN, por sus siglas en inglés).

En la lista del 2018 de los principales procesadores de lácteos aparece en primer lugar la empresa Dairy Farmers of America con 29.2 millones de toneladas, lo que representa el 3.5% de la cuota de mercado del total de la producción mundial de leche.

Las primeras 3 empresas del ranking, DFA, Fonterra, Lactalis, mantuvieron el mismo orden que en el ranking 2016.

Por primera vez ingresa dentro de las 10 del ranking la empresa Amul, de India, con 9.3 millones de toneladas de leche.

EL comunicado de prensa con los principales datos del Ranking 2018 se puede consultar en la siguiente liga:

<https://ifcndairy.org/ifcn-top-20-processor-list-2018/>

A t e n t a m e n t e ,

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Director General

IFCN Top 20 Milk Processors by milk intake

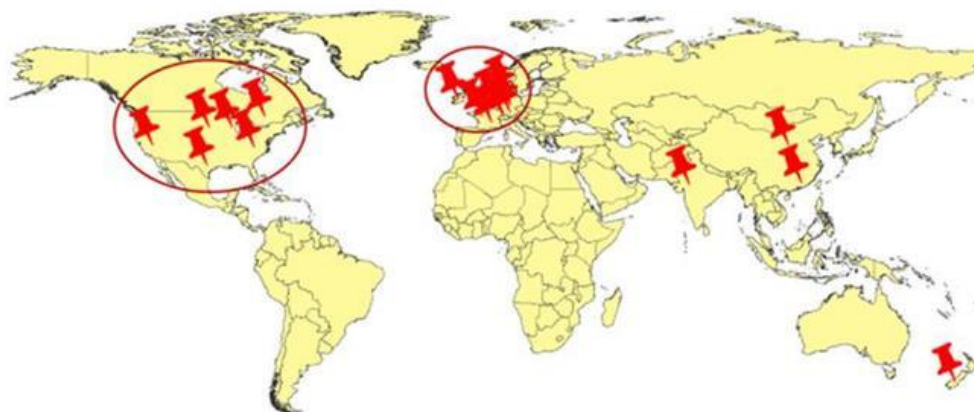


Rank 2018	Company name	Origin & main operation countries	Milk intake in mill. t ME	Estimated turnover per kg milk, in USD	Market share in % of world milk production
1	Dairy Farmers of America	USA	29,2	0,5	3,5%
2	Fonterra	New Zealand/others	23,7	0,6	2,8%
3	Groupe Lactalis	France/others	19,6	1,1	2,4%
4	Arla Foods	Denmark/Sweden/others	13,9	0,8	1,7%
5	Nestlé	Switzerland/others	13,7	1,8	1,6%
6	FrieslandCampina	Netherlands/others	13,6*	1,0*	1,6%
7	Saputo (incl.MG)	Canada/USA/others	9,8*	1,1*	1,2%
8	Dean Foods	USA	9,4	0,8	1,1%
9	Amul (GCMF)	India	9,3	0,7	1,1%
10	Danone	France/others	8,6	2,0	1,0%
11	DMK	Germany/Netherlands	8,1*	0,9*	1,0%
12	California Dairies	USA	7,7	0,5	0,9%
13	Yili Group	China	7,2*	1,4*	0,9%
14	Glanbia Group	Ireland/USA/others	6,5	0,6	0,8%
15	Mengniu	China	6,4	1,4	0,8%
16	Agropur	Canada/USA	6,3	0,8	0,8%
17	Groupe Sodiaal	France	4,9	1,2	0,6%
18	Müller	Germany/UK/others	4,6*	1,1*	0,6%
19	Schreiber Foods	USA	4,5*	1,1*	0,5%
20	Bongrain/Savencia	France/others	4,1	1,3	0,5%
Sum of Top 20			211	1,0	25,4%

Source: IFCN data collection, analysis and estimates (feedback to improve our estimations is always very welcome). Data represents in most cases the year 2017. * = IFCN estimation.

Explanation of variables: 1. Milk intake represents milk volume collected and dairy commodity purchases (in milk equivalent) for the main company and its subsidiaries. Milk intake figures in mill tons. In some cases recalculated from litre (1litre = 1.033 kg). In the milk intake a double counting is possible once a processor sources milk from a collecting cooperative (e.g. DFA) or is sourcing milk in form of dairy products. This means that the total milk volume of the top 20 processors can be overestimated. Content of milk intake (fat and protein level) can be underestimated in some countries such as New Zealand and The Netherlands. 2. Turnover per kg milk: Dairy turnover divided by milk intake. This indicator gives an indication of value creation per kg of milk processed. This figure shall be interpreted with care as the precise number is difficult to define and a direct comparability between companies is limited.

Top 20 milk processors 2018 – Locations



Headquarters: 10 in Northwest Europe, 6 North America, 3 in Asia, 1 in Oceania
 Processing of top 20: 25% of world's milk 2017; 42% of milk delivered