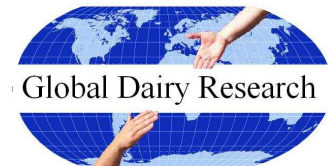


# Global Dairy Research:



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## **Introduction:**

Global Dairy Research is a network of associated members (institutes) linked to Global Dairy Farmers [www.globaldairyfarmers.com](http://www.globaldairyfarmers.com) (GDF). Its targets are doing studies serving the dairy sector and looking for innovations, trends and new farm systems. GDF is one of the leading business partners. The network tries to achieve its targets by developing research projects. The management of this network is done by Wageningen-UR AgroCenter The Hague Netherlands (Alfons Beldman).

## **GD Research**

is a separate network that is aiming to do research projects with results that have an added value for Global Dairy Farmers. The network aims to combine the questions from the GDF network with research questions from others (governments, other official organisation or companies). Through this combination of clients a higher level of research can be achieved. The plus for the others should be the connection with the GDF network (top level farmers and companies). The higher level of research can only be achieved if there is a two-way interaction, this means input from research is required, but also from the GDF network (farmers and companies). The GD Research network has its own budget and management.

In co-operation with the members and business partners of GDF GD Research will do research on the developments, innovations and new business concepts in the dairy industry and its surroundings. Important for the topics of research are the questions of the GDF-network and others. Examples of results so far:

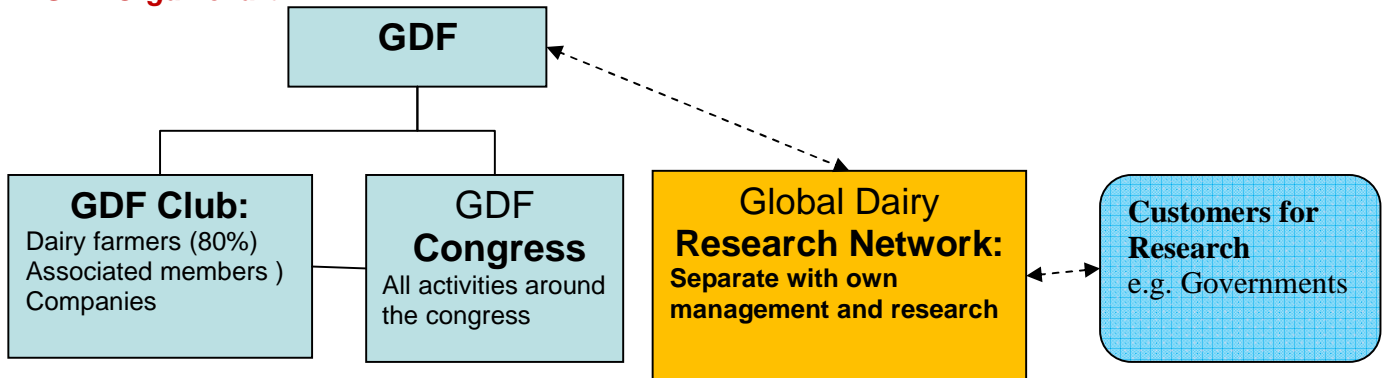
- GDOutlook 2007
- Prospective of the Chinese Dairy Industry 2009

LEI-WUR has committed itself to take the lead of GD Research in 2009 and to take the lead in developing research projects closely connected to GDF.

The activities in 2009 will at first aim at:

- Planning, collecting and organizing input for the GDF Congress China 2009, necessary and useful for the strategy discussions during the congress.
- Presenting sector developments and making the innovation agenda.
- Facilitating the discussions during the congress.
- Making an inventory of possible research questions within and around the GDF-network in order to create a good foundation for follow up projects.
- Reporting the results of the discussions and supporting items.

**GDR Organ chart:**



**Basic understanding of the GDR products:**

	<b>GDR</b>
<b>Key question</b>	Future developments and innovations in dairy. Typical for the GDR projects is the connection with or the translation to the primary producers.
<b>Value of the network</b>	<b>Network for developing and transferring knowledge between dairy farmers, companies and institutes</b> Companies meet farmers and researchers.
<b>Key product USP</b>	<b><i>Giving and developing cornerstones for future developments, innovations and trends in the dairy industry .</i></b> <b><i>By means of facilitating creativity into innovation</i></b> - Access to insights, - Ideas of the future, from farmers and companies together with institutes. - Meeting point between institutes, farmers and companies
<b>Methods</b>	Farmers' outlook Qualitative trends on farm level Reactions on trends in society / legislation etc.
<b>Critical factors for success</b>	Good institutes, farmers and companies Good interaction between institutes, farmers and companies
<b>GDNews</b>	<b><i>(Exclusive for GDF, GDR and business partners)</i></b> This will be produced in cooperation with GDF and published 4-6 times annual
<b>GDAppetizers</b>	One topic e-magazine especially for interested people outside the GDF and GDR networks and the website

## Possible research topics and deliverables

Definite choice of topics and deliverables depends on the choices of clients of GDR

<b>Theme</b>	<b>Research</b>	<b>Deliverables</b>
Farm management and systems	<ul style="list-style-type: none"> <li>• Farm economics</li> <li>• Technical Innovations</li> <li>• Grazing systems</li> <li>• Building concepts</li> <li>• Automation</li> </ul>	<ul style="list-style-type: none"> <li>• Agenda of innovations</li> </ul>
Farm strategies	<ul style="list-style-type: none"> <li>• Strategies based on developments in market and society.</li> <li>• New farming systems</li> <li>• New farmer driven chain concepts</li> </ul>	<ul style="list-style-type: none"> <li>• GDOutlook as 'mirror' for farmers</li> <li>• Business concepts (CN)</li> <li>• Chain concepts</li> </ul>

### **Package for associated members (institutes) in GD Research:**

#### **Target group:**

Global playing institutes in the dairy industry and interested in joint studies with farmers and companies and taking central positions in these studies.

#### **Deliverables**

- Entrance to the Global Dairy Research network and GDF. (GDR managed by Wageningen-UR-AgroCenter The Hague NL)
- Involvement in studies organized by GDR.
- Initiating studies and other research together with partners of the network
- Presenting papers on GDF Congress
- Once a year an extra meeting linked to GDF for discussing hot topics with GDF farmers.
- Entrance to GDF Congresses with 2 persons on same conditions as GDF members

#### **Rules for associated members:**

- Commitment and input for studies
- Member of GDR: annual fee 2500 € for overhead and maintenance of the network
- Member of GDF: annual fee 2500 €

#### **Associated members of GDR are for 2009:**

1. **WUR-AgroCenter (NL)**
2. **Dairy Australia (AU) foreseen**
3. Dairy New Zealand (asked)

#### **Manager:**

Alfons Beldman

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## Concept projects:

*Project 1: Current developments in dairy (research) and innovation challenges for the near future.*

*Client: Global Dairy Farmers*

*Project partners: Wageningen-UR LEI, Dairy Australia (?)*

*Project goal:*

Main purpose of the project is to make an overview of world wide research in dairy that is of importance for the GDF – network. This means that the research has to be available for different important milk producing regions and/or handles topics or challenges that are of great importance for the future of the dairy industry. Important is that a translation from this research to GDF level is made so the presentation can lead to a good strategic discussion within the GDF network. The results will be input for the strategic discussion on the GDF congress in China. During the last congress in Moscow a similar workshop was organized, which resulted in the following result.

	Oceania	USA	Eastern Europe	Western Europe	Russia (Moscow)
<b>Production and sales</b>	Limited increase in output	Stable	Increase	Slight increase	Increase
<b>Societal preconditions</b>	Reduction of greenhouse gases	Increasing influence. End of BST and hormone use	Very limited	Very important	Very limited
<b>Local aspects</b>	Water Labour	Water	Availability of animals. Management level	Good infrastructure good climate	Land prices are increasingly quite rapidly, labour
<b>Economy</b>	Increasing cost price	Cost of biofuels, feed increasing	Milk prices and cost prices increasing	Stable	Good milk prices
<b>Strategy</b>	Increases in scale	Increases in scale, collaboration	Increases in scale	Growth in farms. Added value from chain	Growth, management improvements
<b>Investments</b>	Also off farm	Buildings Land	Buildings land sales	Growth in sales	Buildings Animals Knowledge

For the congress in China we want a more detailed input for the discussion, so we can focus more in the discussion and also have a better fundament to discuss.

The GDF-Outlook 2009 will have the same core, then derived from discussions at the congress in China. Input for the discussions at the congress consists of:

- knowledge and visions of GDF-members;
- knowledge of other experts;
- Country or region studies concerning the developments in dairy farming and dairy industry

- Other valuable information

Before or between the discussions at the Congress the input should be presented to the congress participants. The results of the discussions will be reported after the congress. A table like the one above will be a core part of the report. (parts of) the input for the discussions at the congress will be added to the report.

Activities to be done in 2009:

- Planning, collecting and organizing input for the congress, aimed at usefulness for the strategy discussions during the congress.
- Preparing format for strategy discussions during the congress.
- Reporting the results of the discussions and supporting items.

*Budget:* to be decided

*Products:*

- Presentation at the GDF congress in China, will be published afterward at GDF website, agrocente website and possibly other websites, depending on participating partners.
- Results of the strategy discussion will also be presented and reported.

## *Project 2: Global Dairy Outlook*

*Client:* Global Dairy Farmers and business partners

*Project partners:* Wageningen-UR LEI, Dairy Australia (?), .....

### Project goal:

Main purpose of the project is to get an overview of the main (financial) indicators on farm level in important milk producing regions. This will be done by gathering data from the different regions and extrapolate these data (based on expert knowledge) to the near future.

Preferably data from individual dairy farms will be used. The actualisation, strategies of leading individual farmers, material of other organizations and a round table conference will contribute in the creation of the outlook.

### Regions:

As a start the next regions are defined as important milk regions. The focus is on professional dairy farms, mainly in exporting regions:

- Western Europe, with Denmark, Holland, France and Germany
- USA with Texas and Idaho
- Canada with Alberta
- South America with Brazil and Argentina
- Australia with Victoria, New South Wales and Western Australia
- New-Zealand with Waikato and Southern Island
- Eastern Europe with Russia, Poland, Hungary and Estonia

The definite choice of regions will also depend on partner institutes. Data from EU-region are available through the FADN network.

### Steps\activities:

1. To determine the set of most important indicators/key factors (farm performance and structure) for the different regions: based on attachment 1);
2. Developing and implementing a model for extrapolating the data.
3. Attention for the influence of exchange rates on results.
4. Creating an outlook,
5. Organizing a workshop with farmers and experts to confront trends from the outlook with the intended strategies from leading dairy farmers, during the GDF conference
6. Building up and stabilizing networks, necessary for these targets.

A first set-up of the project, with examples for some regions will be presented at the GDF congress in China.

Budget: to be decided.

Deliverable: presentation at GDF congress