

# Press Release: IFCN Top 20 Milk Processors List 2018



## Top 20 Milk Processors collect 25% of milk worldwide

**IFCN, the Dairy Research Network, published the IFCN Top 20 list of milk processors around the globe. This list is published every second year and shows the market share of biggest milk processor giants. The top 20 milk processors collect 211 million tonnes of milk, 25,4% of produced milk worldwide.**

New results from IFCN Top 20 Milk Processors List 2018 shows that 25.4 % of produced milk worldwide is processed from top 20 dairy giants. The total collection of top 20 milk processors rose steadily from 200 million tonnes in 2015 to 211 million tonnes of milk in 2017. Like the 2016 ranking, Dairy Farmers of America topped the list in 2018 with 29.2 million tonnes milk intake holding 3.5% of the total market share of world's total milk production.

Top 3 Leaders DFA, Fonterra, Lactalis of the list stay stable their positions compared to the previous ranking in 2016.

The companies Arla, Nestlé and Friesland Campina take ranks 4 to 6 with milk intake of ca. 14 million tonnes milk intake.

Saputo increased intake by about 2.1 million tonnes milk through the acquisition of the Australian Murray Goulburn company.

Amul from India is a new entry in the Top 10 ranking in 2018 with 9.3 million tonnes milk enjoying shifting from 13<sup>th</sup> to 9<sup>th</sup> position since previous ranking in 2016. This shift was driven by growing milk intake and the fact that IFCN decided to standardise milk intake from natural content to 4 % fat and 3,3 % protein.

Two big Chinese milk processors, Yili Group and Mengniu show rise in milk intake by about 1 million tonnes since 2016 ranking list, together summed 13.6 million tonnes milk.

It is worth mentioning that estimated turnover per kg milk ranges between 0.5-2.0 USD kg in 2017 which is average 1.0 USD for top 20 milk processors. Every even year published IFCN Top 20 Milk Processors List provides validated, comparable variables to better understand the large dairy processors worldwide.

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## IFCN Top 20 Milk Processors by milk intake



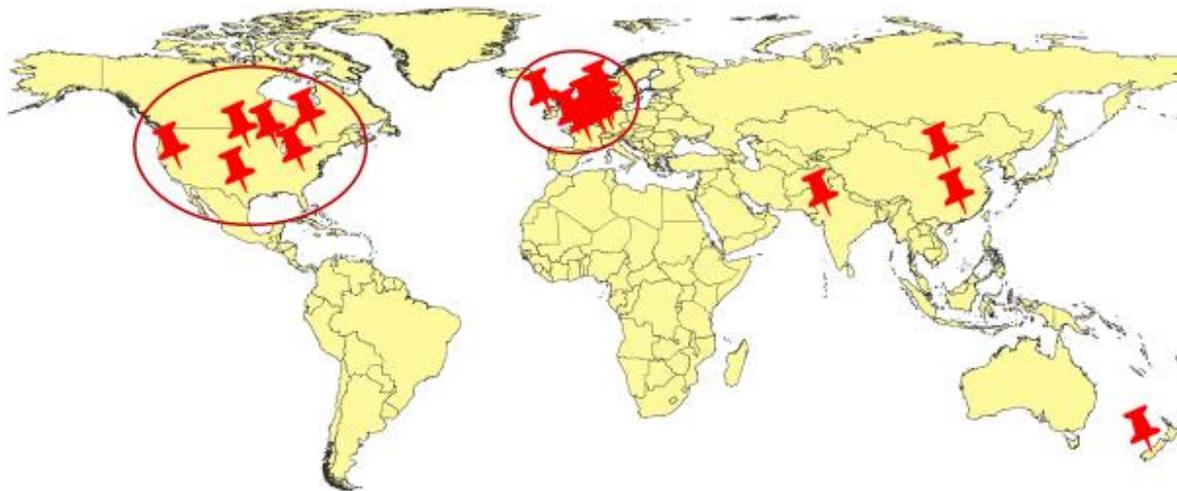
Rank 2018	Company name	Origin & main operation countries	Milk intake in mill. t ME	Estimated turnover per kg milk, in USD	Market share in % of world milk production
1	Dairy Farmers of America	USA	29,2	0,5	3,5%
2	Fonterra	New Zealand/ others	23,7	0,6	2,8%
3	Groupe Lactalis	France/others	19,6	1,1	2,4%
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 (GCMMF)	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%
<b>Sum of Top 20</b>			<b>211</b>	<b>1,0</b>	<b>25,4%</b>

**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 (1 litre = 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.

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## 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 worlds milk 2017; 42% of milk delivered

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Source: D3.2 - Dairy Sector Analysis with IFCN Long-term Dairy Outlook 2030, status 3/2018

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IFCN Dairy Research Network provides globally comparable dairy economic data and forecasts through IFCN Models and a Research partners network in 95 countries. Core competences lie in the field of milk production, milk prices and related economic topics. By providing the dairy data, knowledge and inspiration IFCN aims to create a better understanding of the dairy world.