

Dairy

2012
Sources Available in the
Business Information Centre



Market
Research



Country
Intelligence



Company
Leads



Tender
Opportunities



Useful
Contacts

INTRODUCTION

It is important to keep up to date with what is happening in any industry in order to plan your company strategy effectively. The Business Information Centre can provide a wealth of information on all aspects of the Dairy industry from the global industry as a whole to the more specific sub-sectors including milk, cheese, butter and cream.

In addition, Enterprise Europe NI is hosted by Invest Northern Ireland. The network can provide direct contact with market research centres throughout Europe and is a first point of contact for researching European Dairy markets.

What our research reports say about the dairy market:

Trends: a high level of dairy products that have been launched between 2007 and 2012 are low-fat, catering to those concerned about high levels of fat in dairy products. Smaller portions are also more popular amongst the health conscious. However, there is room in the market for hybrid products that combine ice cream and confectionery. Local sourcing is increasingly important to Irish consumers. (source: Keynote).

Yoghurt - Ireland has the 2nd highest per capita consumption in Europe (34kg per capita – Sweden consumes 39 kg – Source: Business Monitor). This is currently being bolstered by its use in cooking. (Source: Mintel).

Flavoured milk - opportunities exist to attract new customer segments, such as young women and older consumers, to this increasingly popular product segment. (Source: Mintel).

The **global** milk and dairy market is buzzing from the growing demand for products in emerging and newly industrialised states. (source: Keynote).

See below to find out more.

*This guide has been designed to assist with desk research and shows **examples** of reports and websites that might be useful. It is only possible to give an idea of the content of databases and websites. Invest NI does not endorse any of the websites or information providers mentioned.*

MARKET REPORTS

BUSINESS MONITOR (www.businessmonitor.com)

Business Monitor provides Industry trend analysis and forecasts, and competitive intelligence on leading companies, covering 16 industries in Asia, Europe, the Middle East, Africa, and parts of Latin America.

The following lists show **samples** of the reports available within the Dairy sector:

- Food & Drink Quarterly Reports for 70+ Countries
- Industry Forecast – Poland Dairy Outlook – Q4 2012
- Industry Trend Analysis – Declining Production in 2012/13 Signal of Muted Long Term Growth – New Zealand 2012
- Mass Grocery Retail Market Overview for 70+ Countries
- Mass Grocery Retail Industry Trends & Developments for 70+ Countries

DATAMONITOR (www.datamonitor.com)

Datamonitor reports provide comprehensive market intelligence, analysis and forecasting based on primary quantitative and qualitative research. The following is a sample of the reports available:

Market Reports, Interactive Models & Databooks

- Dairy Market Outlook 2011
- Dairy NPD and Successes 2012
- Impulse Ice-Cream in the BRIC (Brazil, Russia, India, China) Countries, Market Overview and Forecasts to 2014
- Product Insights: Dairy in Australia 2011
- Product Insights: Dairy in Brazil 2011
- Product Insights: Dairy in China 2011
- Product Insights: Dairy in India 2011
- Product Insights: Dairy in Mexico 2011
- Product Insights: Dairy in the UK 2011
- Product Insights: Dairy in the US 2011
- The Future of Functional Dairy Ingredients 2012
- Databook – Dairy Food to 2014 in:

Argentina	Denmark	Italy	Poland	Taiwan
Asia Pacific	Eastern	Japan	Portugal	Thailand
Australia	Europe	Latin America	Regional	Turkey
Austria	Egypt	Malaysia	Level	UAE
Belgium	Emerging	Mexico	Romania	UK
Brazil	Markets	Middle East &	Russia	US

BRIC	Finland	Africa	Saudia Arabia	Ukraine
Bulgaria	France	Morocco	Singapore	Uruguay
Canada	Germany	Netherlands	Slovakia	US
Chile	Global	New Zealand	Slovenia	Venezuala
China	Greece	Nigeria	South Africa	Vietnam
Columbia	Hong Kong	Norway	South Korea	Western Europe
Croatia	India	Nth America	Spain	
Czech Rep	Indonesia	Pakistan	Sweden	
	Ireland	Philippines	Switzerland	
	Israel			

Industry profiles

- Dairy in:

Asia Pacific	Germany	Russia
Australia	Norway	Saudi Arabia
Austria	Peru	Singapore
Belgium	Poland	South Africa
Brazil	Portugal	South Korea
Canada	Global	Spain
Chili	Hungry	Sweden
China	India	Switzerland
Columbia	Ireland	Taiwan
Czech Republic	Israel	Turkey
Denmark	Italy	UAE
Egypt	Japan	UK
Europe	Mexico	US
France	Netherlands	Venezuala

- Milk in:

Asia Pacific	Germany	Netherlands
Belgium	Global	Portugal
Canada	Ireland	Spain
China	Italy	UK
Europe	Japan	United States
France		

- Yoghurt in:

Ireland	Philippines	Thailand
Malaysia	Portugal	

- Ice Cream in:

Asia Pacific
Belgium
Canada
China
Europe

France
Germany
Global
Italy
Japan

Netherlands
Spain
UK
United States

- Cheese in Portugal 2012
- Cheese in Ireland 2012

Detailed company analyses

- Top 5 in the Dairy Sector are:

- Associated Milk Producers Inc.
- China Mengniu Dairy Company Limited
- Dairy Crest Group Plc
- Dairy Farm International Holdings
- Irish Dairy Board Co-operative Limited

Frost & Sullivan (www.frost.com)

Frost & Sullivan provides access to over 4,000 market reports for a wide range of sectors globally. These reports provide valuable analysis of market size, shares, distribution and forecasts. The following is a sample of the reports available:

- Market for Dairy Ingredients in South Africa 2012
- Strategic Analysis of the Asia-Pacific Probiotic Cultures Market 2012
- Strategic Assessment of the GCC Food Flavours Market 2012
- Strategic Assessment of the Indian Flavours Market: White Paper 2012

KEYNOTE (www.keynote.co.uk)

Keynote is an online database providing information on 27 industry sectors in the UK. Reports cover industrial and consumer sectors and information includes market size and trends, key players and company profiles. **There is always a chapter on the global market.** The following is a sample of the reports available:

- Dairy Industry, Business Ratio 2012
- Ice Cream and Frozen Desserts Update 2011
- Milk and Dairy Products 2012

MINTEL (www.mintel.com)

Mintel market reports analyse market sizes and trends, market segmentation and consumer attitudes and purchasing habits, as well as assessing the future market. The following is a sample of the reports available through Mintel for the Dairy industry:

- Agriculture & Farming Ireland 2011
- Artisan Foods Ireland 2012
- Attitudes towards Family Dining 2012
- Breakfast Eating Habits UK 2011
- Cheese, UK 2012
- Dairy Drinks, Milk and Cream, UK 2012
- Dairy Products, Ireland 2012
- Food Processing Ireland 2011
- Food Provenance UK 2011
- Food Service Ireland 2012
- Ice Cream, UK 2012
- Organic Food & Drink Ireland 2011
- Organic Food UK 2011
- Sandwiches & Lunchtime Foods UK 2011
- Yellow Fats and Edible Oils 2012
- Yoghurts and Desserts, UK 2012

PLIMSOLL (www.plimsoll.co.uk)

Plimsoll specialises in providing up to date, authoritative financial analysis. They publish in-depth industry reports and market analysis on over 1500 UK industries. The following is a sample of the reports:

- Dairy Equipment 2012
- Dairy Northern Ireland Industry Report 2012
- Dairy Produce Merchants 2012
- Dairy Produce & Supplies

UK TRADE & INVESTMENT (UKTI) (<https://www.uktradeinvest.gov.uk>)

UKTI has extensive research contacts in every sector, in every country. They also publish research on their website. The following reports are a sample of what is available:

- The Food & Drink Sector in Egypt 2012
- The Food & Drink Sector in South Africa 2012

- The Food & Drink Sector in South Korea 2012
- The Food & Drink Sector in Argentina 2012
- The Food & Drink Retail Sector in France 2012
- The Food & Drink Sector in Ireland 2012
- The Food & Drink Sector in Germany 2012

HARDCOPY REPORTS

- The Grocer – Directory of Manufacturers & Suppliers 2012

Some Management Consultants specialise in different sectors and make detailed research available on their websites. Those with research available on the Dairy sector include:

- KPMG GLOBAL –
<http://www.kpmg.com/Global/en/WhatWeDo/Industries/Pages/default.aspx>
- ACCENTURE –
<http://www.accenture.com/us-en/industry/Pages/index.aspx>
- PWC GLOBAL –
<http://www.pwc.com/gx/en/industry-sectors/index.jhtml>
- ERNST & YOUNG –
<http://www.ey.com/GL/en/Industries>

COMPANY INFORMATION

Identifying companies and finding the right information about their activities and performance is essential to making good business decisions. The Information Centre has a wide range of company databases that can provide financials, product information, company details or trade names. Company information on agents or distributors, competitors or even potential customers, can be searched for on an international, regional, national or local level through a variety of databases including Kompass and Amadeus.

Some of these databases have free, limited searching available on the internet. This can help to identify potential companies which can be researched further. The following links are useful:

- Bureau Van Dijk – Free Directory - www.bvdep.com
- Kelly's Directory – www.kellysearch.com
- Kompass – www.kompass.com

Datamonitor supplies company profiles on the larger global corporates including, Vietnam Dairy Products J.S.C., Umang Dairies Ltd and Prairie Farms Inc These

profiles provide an invaluable analysis into the competitive and strategic performance of the company.

STATISTICS

The National Statistics website, www.statistics.gov.uk, holds information on import and export trade statistics for many products:
<http://www.statistics.gov.uk/OnlineProducts/>

Datamonitor also provides very comprehensive statistics and forecasts.

ASSOCIATIONS

Associations are an extremely useful way to find information on either markets or companies within the sector. Many associations hold detailed membership directories and many also include detailed market reports, statistics, events, industry news and useful links. Relevant associations include:

NORTHERN IRELAND:

- Food Standards Agency for Northern Ireland - www.food.gov.uk/northernireland
- Northern Ireland Dairy Association - www.nida.co.uk

IRELAND:

- Food Safety Authority for Ireland - www.fsai.ie
- Irish Agriculture and Food Development Authority - www.teagasc.ie/
- Irish Cattle and Sheep Farmers Association - www.icsaireland.com/
- Irish Co-operative Organisation Society - www.icos.ie/home/index.asp
- Irish Creamery Milk Suppliers Association - www.icmsa.ie/
- Irish Dairy Board - www.idbusa.com/
- Irish Food Board - www.bordbia.ie/
- Irish Farmhouse Cheesemakers Association - www.irishcheese.ie/
- National Dairy Council of Ireland - www.ndc.ie/
- The Irish Farmers Association - www.ifa.ie/

UK:

- British Cheese Board Association - www.britishcheese.com/
- British Sheep Dairying Association - www.sheepdairying.com/
- Dairy Industry Association - www.diaryuk.org
- National Dairy Council - www.milk.co.uk

- Organic Milk Suppliers Co-Operative - www.organicmilk.co.uk.
- Provision Trade Association - www.provtrade.co.uk/
- Royal Association of British Dairy Farmers - www.rabdf.co.uk
- Stilton Cheese Makers' Association - www.stiltoncheese.com/
- The British Sheep Dairying Association - www.sheepdairying.com
- The Specialist Cheesemakers Association - www.specialistcheesemakers.co.uk
- UK Dairy Association - www.ukidf.org

EUROPEAN:

- German Milk Industry Information Service - www.milchmarkt.de/en/index_en.html
- European Dairy Association. - www.euomilk.org/eda/index.aspx
- European Union of Dairy Trade (EUCOLAIT) - www.eucolait-dairytrade.org/app/pub/
- European Whey Products Association - www.euomilk.org/
- National Association for Poultry and Eggs in Italy - www.unionenazionaleavicoltura.it/pres-english/presentazione.asp
- Swedish Dairy Association - www.svenskmjolk.se/english.asp

INTERNATIONAL:

- International Association of Food Industry Suppliers - www.fpsa.org/
- International Dairy, Deli, Bakery Association - www.iddba.org/
- International Dairy Federation - www.fil-idf.org.
- International Dairy Foods Association - www.idfa.org/
- National Dairy Council of the US - www.nationaldairycouncil.org/NationalDairyCouncil/
- National Frozen & Refrigerated Foods Association of the US - www.nfraweb.org/
- The American Cheese Society - www.cheesesociety.org/
- The American Egg Board - www.aeb.org/
- US Poultry and Egg Association - www.poultryegg.org/

Invest NI is not responsible for the content of external websites and inclusion in, or exclusion from, the above list does not imply recommendation, endorsement or otherwise of any company, product or service.

NEWS

Business Information Centre subscribes to a number of news databases which provide access to articles news and trade sources.

A vast amount of current and retrospective News articles on the industry can also be obtained from Datamonitor and Mintel.

The Lexis Nexis database has access to trade and news sources from around the world.

JOURNALS

- Bell Publishing Ltd – The Dairy Industry
- Farmweek
- IFK – Farmers Journal (Irish)
- Pebbles Media Group – Scottish Grocer
- William Reed Business Media – The Grocer
- Greer Publications – Ulster Grocer

FINDING LOCAL AND EUROPEAN GOVERNMENT CONTACTS

The Tenders Alert Service is hosted by Enterprise Europe NI for Invest NI. It enables you to identify local and international contract opportunities from a wide range of public sector organisations via a daily alerting service. In 2010, 58 companies on the service won 114 contracts potentially worth £239 million.

The team can also offer guidance on:

- tendering procedures
- UK and EU Public Procurement Regulations
- supplying to local government, education boards, the health sector and utility companies
- The charge for the service is £100 plus VAT per annum. For more information, contact:

Derval Mooney	Tel: 028 9069 8134	Email: derval.mooney@investni.com
Stephen McCann	Tel: 028 9069 8108	Email: stephen.mccann@investni.com

Or email tenders@investni.com

EXHIBITIONS/TRADESHOWS

Exhibitions/Tradeshows are a good way to market your product, finding out who your competitors are, networking and finding new customers. To find out about exhibitions and tradeshows in this sector, worldwide or locally, just click on the links below:

<http://www.exhibitions.co.uk/>

<http://www.expodatabase.com/messedb/>

RELATED LINKS

Other sector guides related to this sector are:

- Meat, Fish & Poultry
- Food and Drink Services
- Bakery

These sector guides along with others can be found on the Invest NI website:

<http://www.investni.com/index/publications.htm?filter=S>

These are only examples of information available for the industry. If you require anything specific or have any questions, please do not hesitate to contact Kathy McConville, 028 9069 8127 or any member of the Business Information Centre by e-mail: bic@investni.com.

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