

# Analysis of the Brittany dairy sector to 2030

Decrease in production expected



WORK PACKAGE 4  
DAIRY SECTOR ANALYSIS

## Overview of outlook to 2030:



Dairy cows numbers is projected to decrease by 8 % from 748 000 to 687 000. Yield would slightly increase from 7 510 to 7 800 kg/VL/an.



The milk production is projected to decrease by 5 % from 5,619 million tons to 5,361 million tons.



In a purpose of more autonomy, the dairy farms would use the same amount of concentrate but will be more efficient.



The number of dairy farms would decrease by 32 % until 2030.



The dairy sector dynamic would lead to an increase of the Brittany farm's dimension. The average size would go to 122 ha (+ 28 %) with a dairy herd of 87 cows (+ 25 %).



The number of farms with more than a hundred cows is projected to 50 % against 36 % in 2019. The number of farms between 50-100 cows is projected to 45 %.

- Projections are subject to no trade disruption, CAP reform or future free trade agreements.
- Projections subject to no major impact of climate change.

# Analysis of key performance indicators for Brittany

## DAIRY COW NUMBERS

Projections show a significant decrease in the number of dairy farms in Brittany. This is mainly due to the non-renewal of farmers, the attractiveness of the profession and the competition with other productions. The number of farms is expected to decrease by 32% from 11 546 in 2019 to 7 900 in 2030 (Brittany 2040 prospective).

The number of dairy cows is projected to decrease by about 8%, partly due to the reduction of the number of farms. However, the decline would be less than that of dairy farms due to an increase in the size of dairy farms and a continued demand for milk in France.

Figure 1 : Number of dairy farms projections to 2030

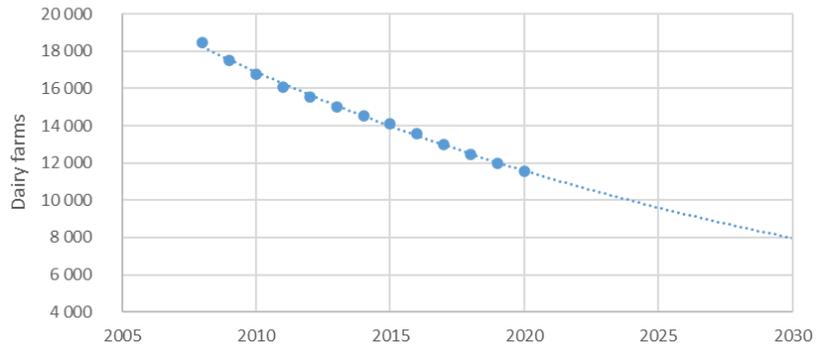


Figure 2 : Dairy cows projections to 2030

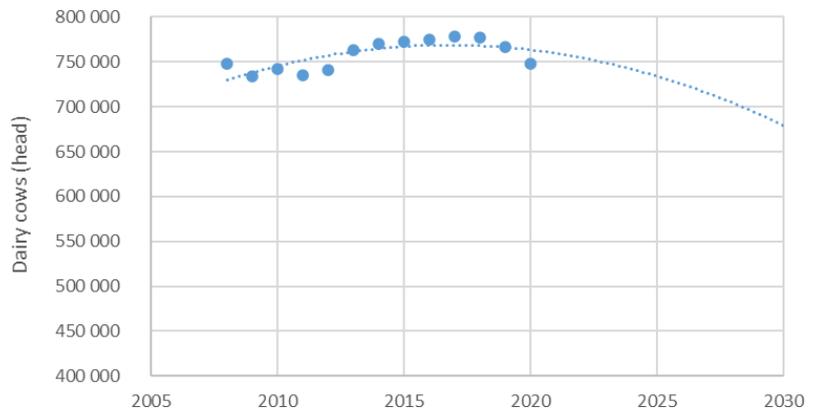


Figure 3 : Milk sold per collection site projections to 2030

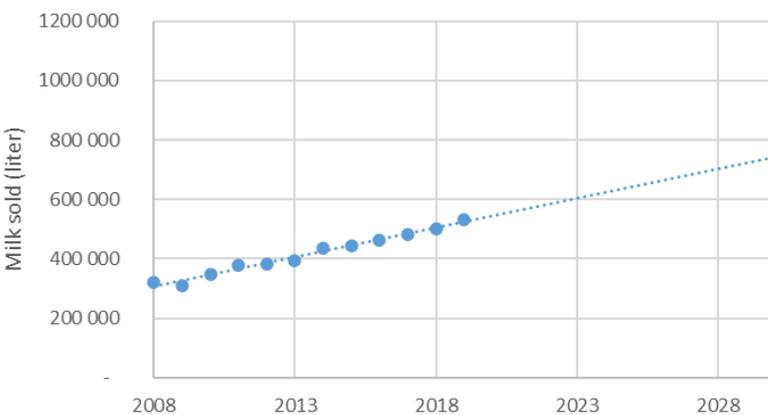
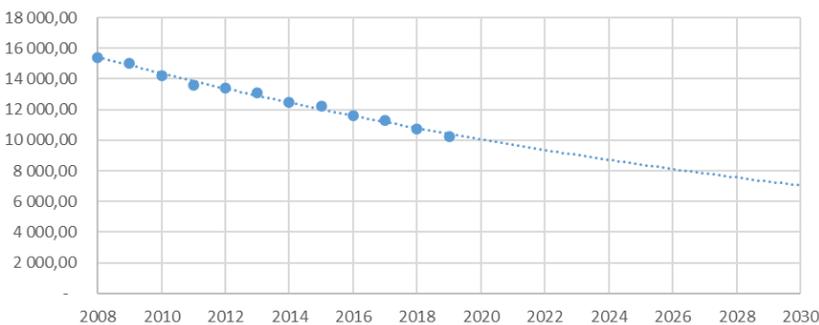


Figure 4 : Milk collection site projections to 2030



## PRODUCTIVITY

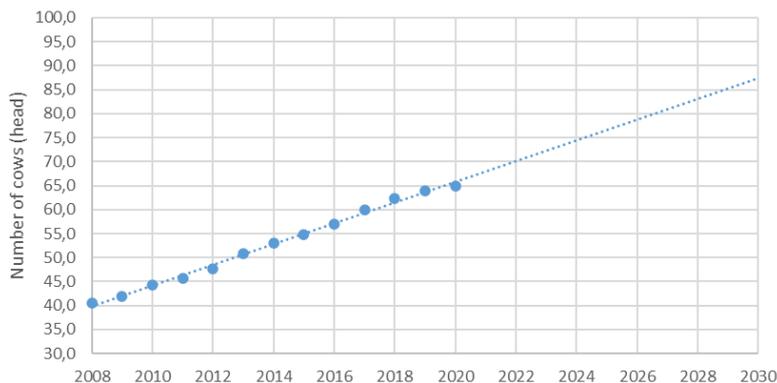
In order to have the milk production evolution, the best method was to take the criterion “milk sold per collection site”. Projections show an increase of milk sold per collection site of 39 %, achieving 740 000 liters of milk per collection site. In the same time, the number of milk collection site would decrease of 32 % (see below). As seen previously, the same decrease would be observed in dairy farms evolution.

The milk productivity would increase about 300 L/cow, from 7 500 to 7 800. This increase would be achieved with a better forage's quality and a little bit more of grazing in dairy cow's diet (+ 2% in 2030). Also, the average stocking rate (LU/ha) would decrease from 1,1 to 1 LU/ha thanks to a better heifer's management. So, the concentrate would be lowered of 100 kg/cow/year, achieving 1 000 kg/cow/year in 2030.

## DAIRY FARM STRUCTURES

The average dairy herd size is expected to increase by 34 % from 65 cows in 2019 to 87 cows in 2030. The number of dairy farms with more than 100 cows would increase strongly from 36 % in 2019 to half of dairy farms in Brittany until 2030. In the same time, the average farm size would proportionally increase as the dairy herd size in order to keep a certain autonomy and also to respect the nitrogen density. The average farm size would grow from 88 ha in 2019 to 122 ha in 2030.

Figure 5 : Average Herd Size - Projected to 2030



## MILK DELIVERIES & PROCESSING CAPACITY

Due to the expected decrease of 5 % of the Brittany's milk production, the regional self-sufficiency would decrease from 531 % to 497 % but stay very high. At a national scale, the demand would stabilize despite a decrease of milk consumption per inhabitant (- 3%) thanks to the population growth. The part of French milk produced in Brittany would increase from 22 % to 25 % due in part to better climate conditions than in other territories in France.

## REFERENCES

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