



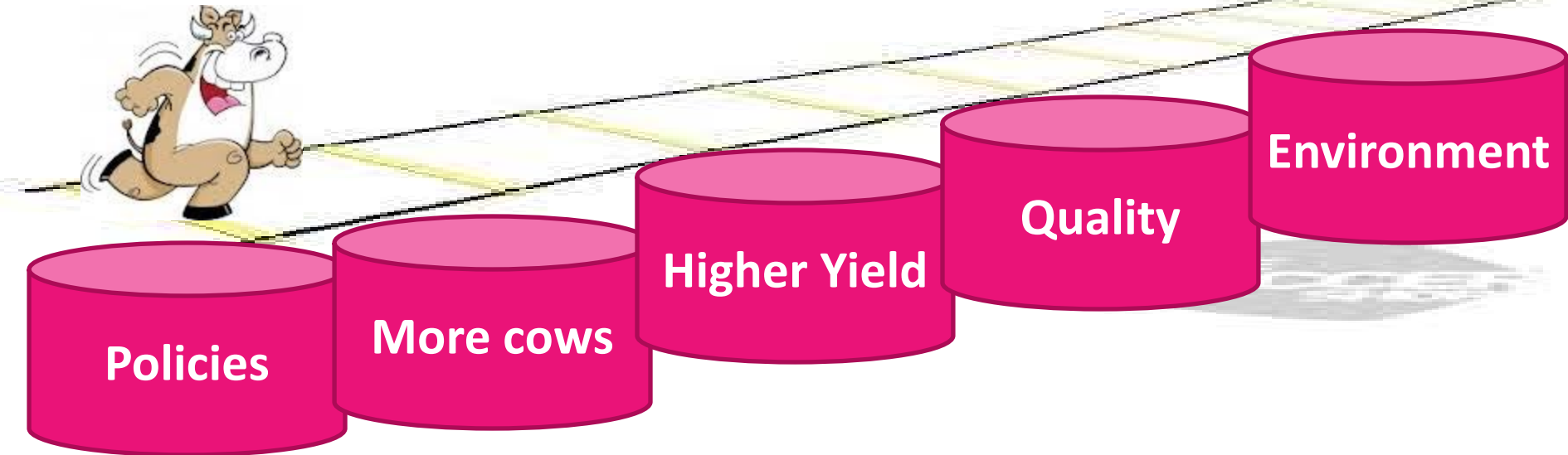
MAPPING THE CHALLENGES

For Sustainable Dairy Development in Vietnam

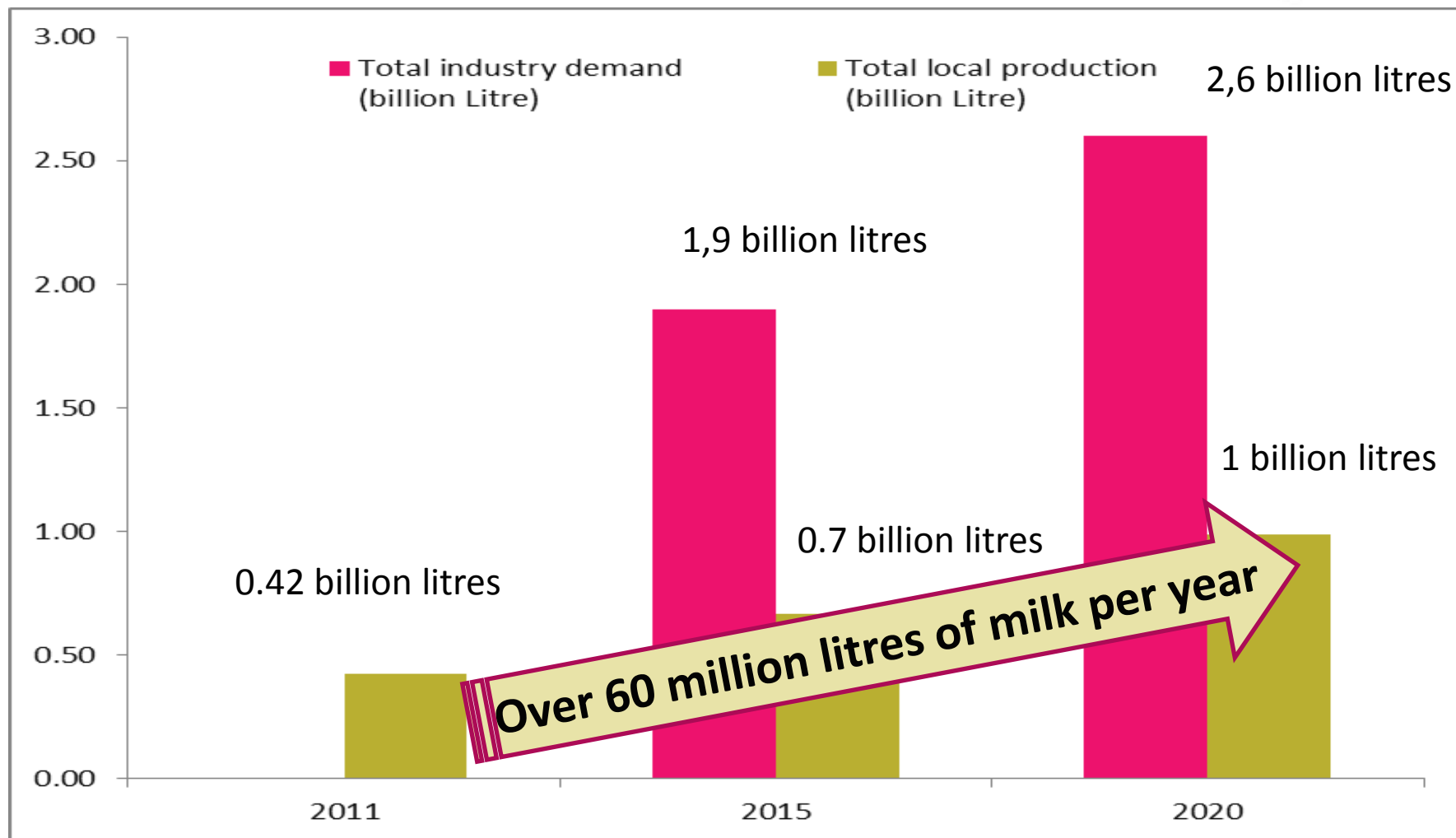


Introduction

- Outlook for the dairy development in Vietnam
- Mapping the challenges for the sustainable dairy development:



Vietnam Strategic Vision

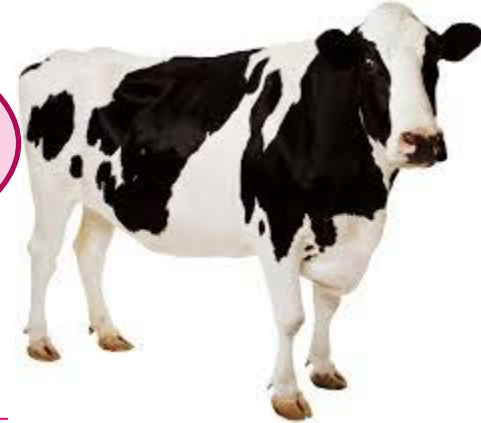


Source: Decree 3399/QĐ-BTC dated 28/6/2010

Tactical Approaches



**Increase by over 60
million liters per
year**



**More quality milk yield
per cows**

More cows

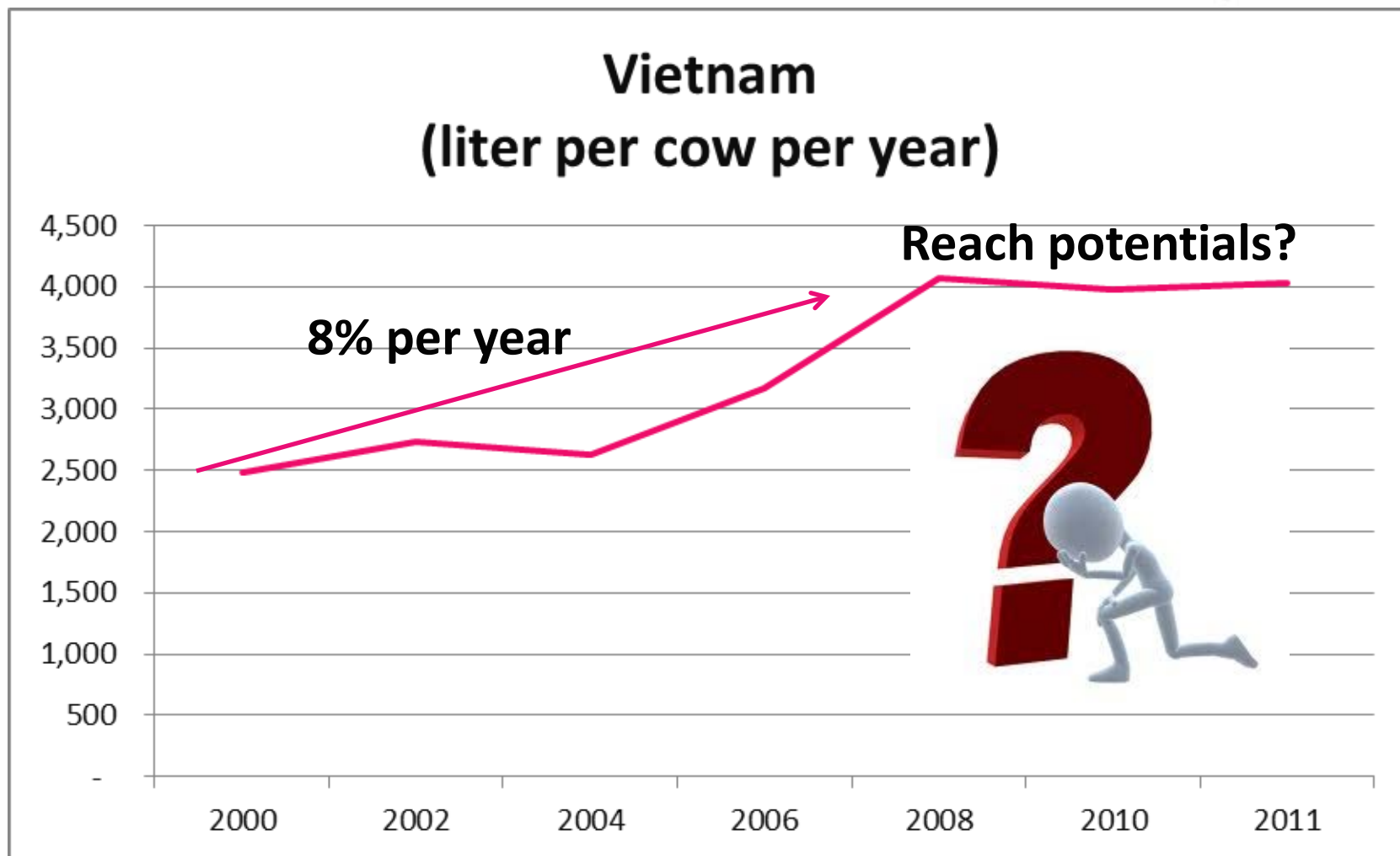
Cow breeds

Husbandry

More farmers

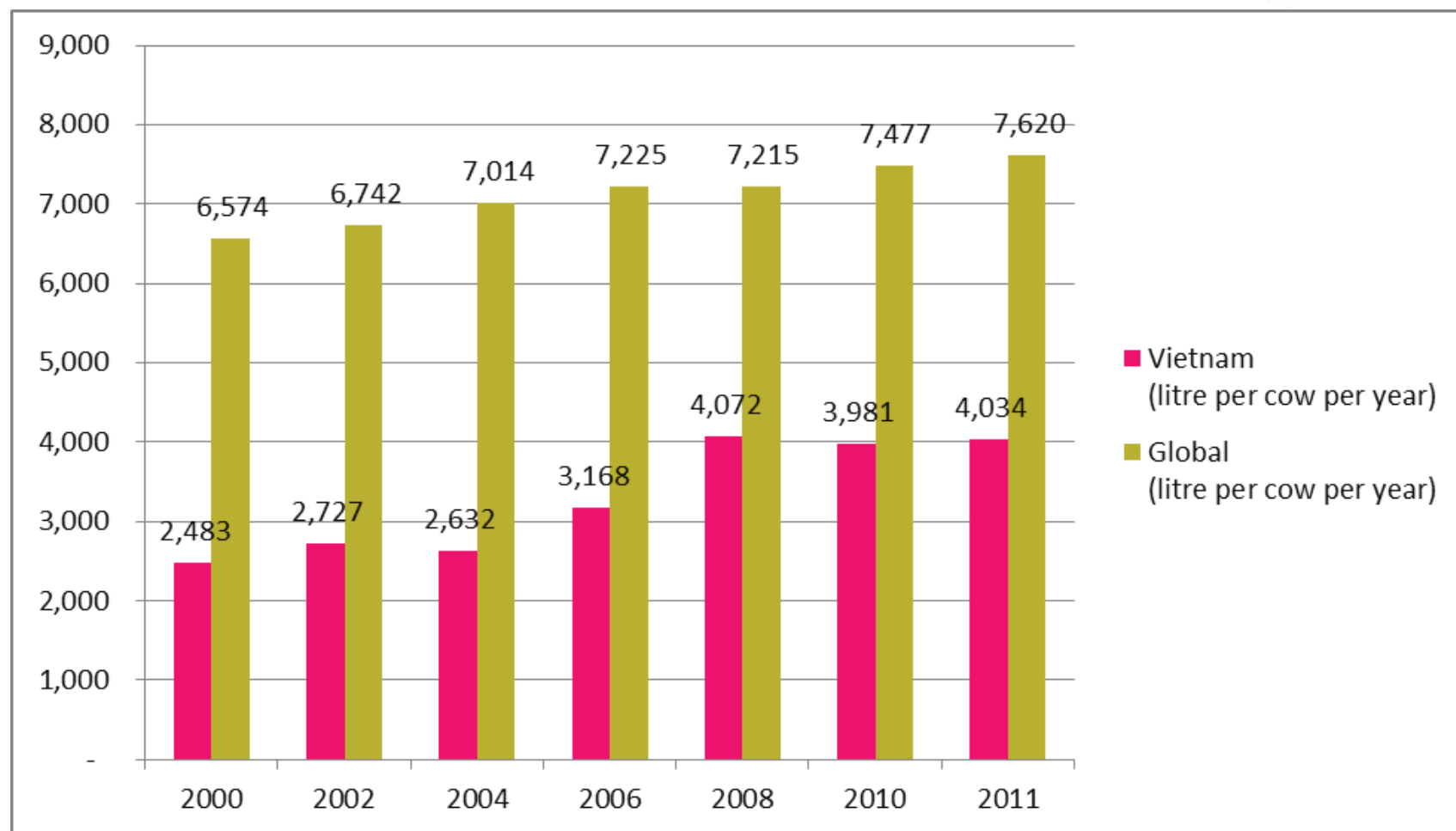
**More cows per
existing farmers**

Milk Yield Increase Over The Past Years



Source: MARD 2012

Average Milk Yield in Vietnam and Global in 2011



Source: MARD and IFCN

Tactical Approaches



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Cow breeds

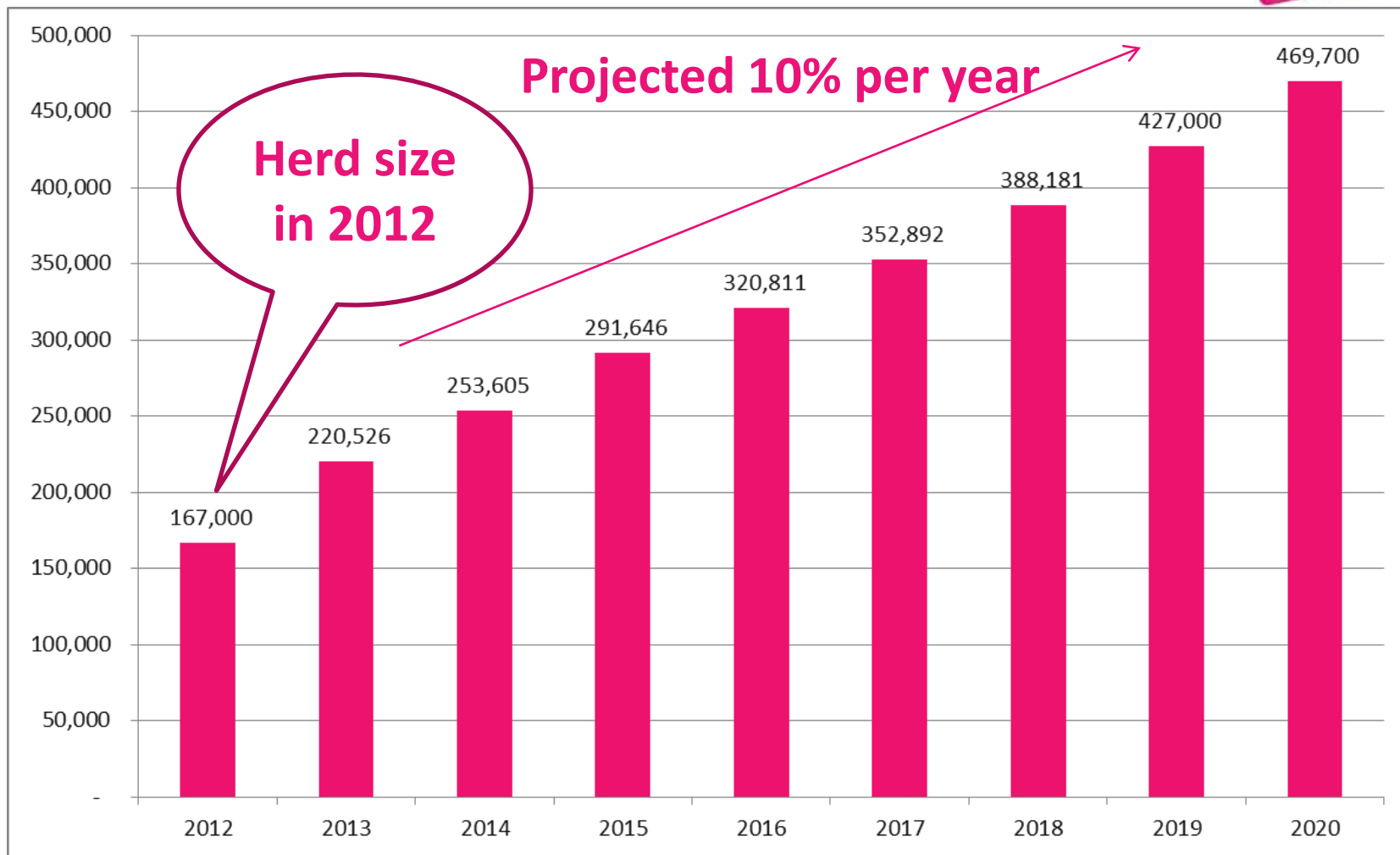
Husbandry

More cows

More farmers

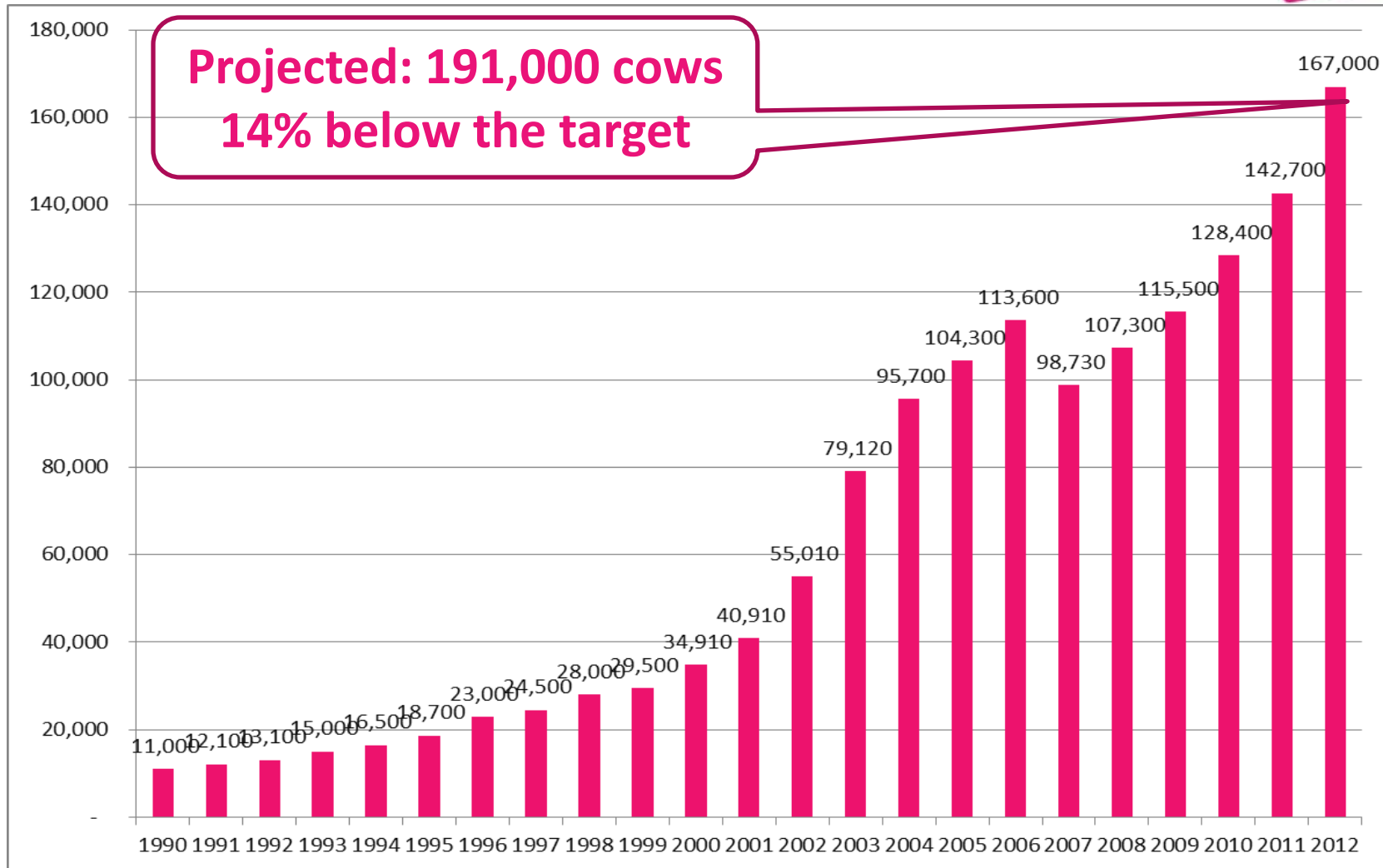
**More cows per
existing farmers**

Projected Herd Development in Vietnam 2013-2020



Source: DLP/MARD

Past Record of Herd Development 1990-2012



Source: Dinh Van Cai and MARD

Milk Quality



Cow Breed

**Feeding
Management**

**Lactation
stage**

Animal Health

Environment

Medicine use

Milking

**Storage and
processing**

Objectives for Vietnamese Dairy Sector



Milk Quality Assurance

Dairy Herd Increase

Yield Improvement

Types of Dairy Farms in Vietnam



Large Corporate Farms

Smallholder dairy farms



Smallholder Dairy Enterprise



Over **90%** of locally produced milk is from smallholders and thus the sustainability of the Vietnamese dairy sector greatly depends on maintaining and expanding **smallholder dairying.**



3 Key Factors for Sustainable Dairy Enterprise



1990
2010
2015
2020

A thick pink arrow points downwards from the year 1990 to 2020, indicating the passage of time.

Economics

Now: 2013



Social



Environment



Dairy Profit as a Sustainability Factor



- Higher quality milk yield
- More calves
- Manure collection
- Culled cows

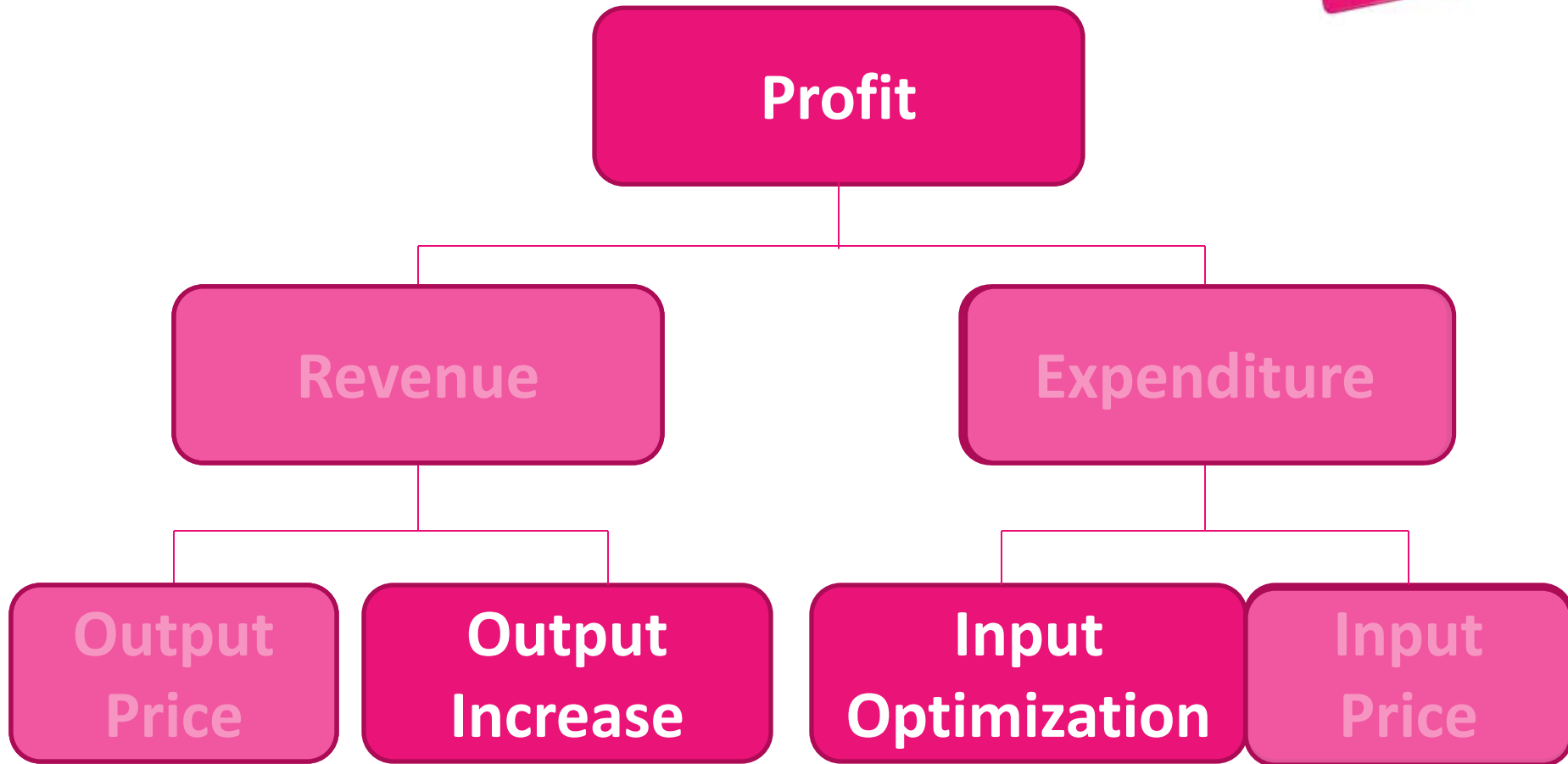
Profit = Total incomes – Total costs

- Feed
- Depreciation
- Medicines
- A.I
- Labors



Source: Cai 2009

Approaches to Increasing Dairy Profit



Sustainable Dairy Development



Enabling Policies

Financial support

**Milk harvesting
and hygiene**

**Genetics &
reproductive
management**

**Nutrition and
Feeding
Management**

- More cows
- Higher milk
- Quality Milk
- Competitiveness

**Disease
prevention and
control**

Environmental and Social Management

THANK YOU

