



Sectorul laptelui din Romania  
la 16 luni de la aderare

INTERLCTA – editia I –a 2008  
Poiana Brasov



## Principalele probleme ale – *Industria Laptelui* inainte de Aderare

- **Restrictii** foarte mari referitoare la **calitatea laptelui** materie prima, fata de situatia in teren
- Agricultura atomizata si polarizata – foarte putine ferme de vaci medii, comerciale, foarte multe fabrici
- Grad de echipare al fermelor de vaci si al fabricilor, foarte scazut – productivitate scazuta – costuri de productie mari
- Lipsa structurilor asociative, care sa promoveze interesele membrilor si/sau perioada de pionierat a celor existente
- Lipsa unei strategii coerente in dezvoltarea sectorului de industrializare a laptelui



## Principalele probleme ale – *Industria Laptelui* inainte de Aderare

- Lipsa coerenței în managementul sectorului

**OBIECTIVE**

Responsabili  
implementare

Termene limita  
implementare

Evaluare  
Control

noul  
Plan de Actiune



# 2008 Piata laptelui materie prima

## 1. Context

### 1.1 Context Local

- Sezonalitate mare a productiei de lapte
- Inca putin lapte livrat de calitate EU
- 262 procesatori de lapte si numai 1.3 mil. to lapte

### 1.2 Contextul European

- Constrangeri din partea Sistemului de Cota
- OMC presiuni pentru eliminarea subventiilor
- Reformarea PAC

### 1.3 Contextul Mondial

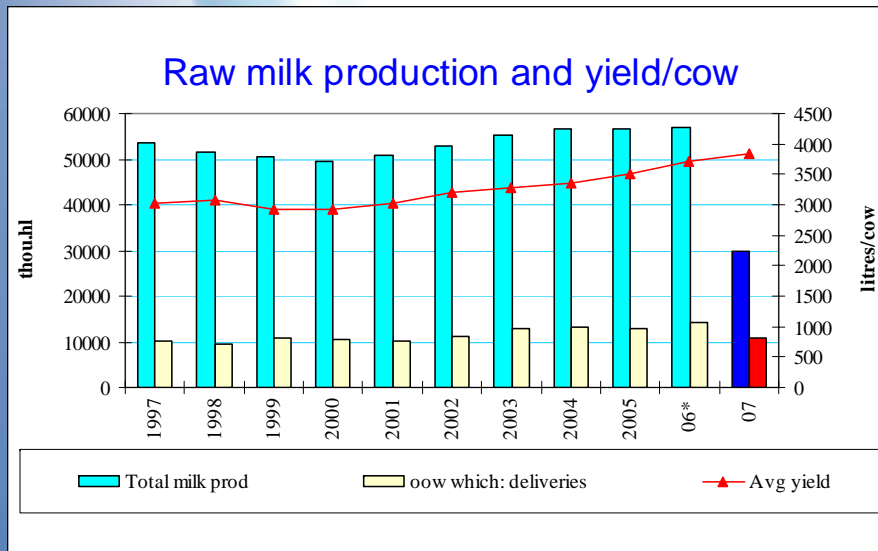
- Dezvoltarea economica – Cresterea consumului
- Productia de biocarburanti
- Schimbarile climaterice – managementul apei
- Expansiunea imobiliara



Cat lapte producem in RO, cat colectam,  
si ce produse lactate facem cu acest lapte?



MILK QUOTA SITUATION



Country	Milk Production 2001		Milk Quota				TOTAL '06/01	
	Total	Dairies	2004			Reserve		
000 Tons	Total	Dairies	Total	Dairies	Dir sales	ve	Total	
Poland	12.030	7.037	8.964	8.500	464	416	9.380	78%
Romania ini	5.100	1.200	3.057	1.251	1.806	188	3.245	64%
RO end 07			3.057	1.320	1.737	188	3.245	
Czech Rep	2.702	2.512	2.682	2.613	69	56	2.738	101%
Hungary	2.100	1.726	1.947	1.783	164	43	1.990	95%
Lithuania	1.730	1.153	1.647	1.256	391	58	1.705	99%
Slovakia	1.114	930	1.013	991	22	27	1.040	93%
Bulgaria			701	630	71	278	979	
Latvia	848	403	695	469	226	33	728	86%
Estonia	687	460	624	537	87	22	646	94%
Slovenia	660	461	560	467	93	16	576	87%
Chypre	145	145	145	141	4	0	145	100%
Malta	49	49	49	---	---	0	49	100%
<b>Total</b>	<b>27.165</b>	<b>16.076</b>	<b>25.141</b>	<b>19.958</b>	<b>5.134</b>	<b>1.325</b>	<b>26.466</b>	<b>97%</b>

Spec.	MU	2006	2007	Dif +/- %.
Cow milk coll. by proc	to	1.133.122	1.144.097	0,96
Av. Fat cont	%	3,65	3,69	1,08
Av. Prot cont	%	3,20	3,03	-5,61
Milk for consumption	to	173.869	184.055	5,86
Cream for consumption	to	39.370	46.159	17,24
Fermented products	to	108.457	129.951	19,82
Butter	to	7.485	8.216	9,77
Cheese	to	65.032	67.304	3,49
Total dairy product	to	394.213	435.685	10,52

Lapte total colectat '07 – 1.144.097 to  
Lapte livrat est an cota '07 – '08 - 1.320.000 to  
Lapte de calit. EU'07/'08 – 45 % -- 594.000 to

Fabrici de procesare lapte autorizate - 262  
Centre de colectare autorizate - 984  
Centre de colectare in per Tranzitie - 1140



## Calitatea laptelui – Situatia actuala si previziuni- 2006 - 2009

	<i>RO std 2007</i>	<i>RO std 2009</i>	<i>EU std 2010</i>
◆ <i>Microbiology</i>			
Somatic cells	< 600.000 /ml	< 400 000 / ml	< 400 000 / ml
Total no. of germs	< 1 000 000 / ml	< 500.000 / ml	< 100 000 / ml
Butyric	-	< 1 000 / ml	< 1 000 / ml
◆ <i>physic-chemical</i>			
Cryoscopy	-	≥ - 0,520	≥ - 0,520
Protein	≥ 32 g/l	≥ 32 g/l	≥ 32 g/l
Fat	≥ 35 g/l	≥ 35 g/l	≥ 38 g/l
Density	1,028	1,028	1,028
Acidity	17-18		
◆ <i>Food security</i>			
Inhibitors ( antibiotics )	<i>absent</i>	<i>absent</i>	<i>absent</i>
Aflatoxin	-	<i>absent</i>	<i>absent</i>
Pesticide		<i>follow the actual legislation</i>	



## ◆ Obiectivele Romaniei

In imbunatatire calitatii laptelui Sept.'06 – Dec. '09

Category of milk quality NTG / ml	Current situation Aug '06	April '07	April '08	April '09	Dec. '09
> 1.000.000	47%	0%	0%	0%	0%
< 1.000.000	53%	100%	100%	100%	0%
< 500.000	40%	50%	75%	90%	0%
< 100.000	31%	35%	50%	80%	100%
			↓ 44 %		



## Romanian Establishments Category

09.04 '08

Categoria	Calitate lapte procesat		Tip Marca	Distributie
A – Fabriци care corespund din punct de vedere structural (constructiv, tehnologic siguranta alimentara etc) standardelor UE	Fabriци care prod toate tipurile de produse lactate- <b>25</b> (18+2+2+3)	Lapte calit. EU	Oval	Piata UE
	Fabriци care proc produse lactate cu perioada lunga de maturare <b>9</b>	Lapte calit EU si RO	Oval	Piata UE
	Fabriци care au doua linii separate de procesare a laptelui - 2	Lapte calit. EU	Oval	Piata UE
		Lapte calit RO	Rotund	Piata Nationala
Fabriци care produc toate tipurile de produse lactate - <b>40</b>	Lapte calit EU si RO	Rotund	Piata Nationala	
C-Fabriци care beneficiaza de perioada de tranzitie	Fabriци care produc toate tipurile de produse lactate din lapte RO si UE ( Dec 2009) <b>198</b>		Rotund	Piata Nationala
TOTAL Establishments	<b>262</b>			

## Cows live stock structure

Category	No. of farms	% of total	No. of cows	% of total	Cows farm
<b><i>TOTAL:</i></b>	<b><i>1.106.286</i></b>	<b><i>100,00</i></b>	<b><i>1.737.065</i></b>	<b><i>100,00</i></b>	<b><i>~1,5%</i></b>
<b>&gt; 100 heads</b>	164	0,01	34.382	1,98	209
<b>51 - 100 heads</b>	246	0,02	16.892	0,97	69
<b>31 - 50 heads</b>	443	0,04	16.980	0,98	38
<b>21 - 30 heads</b>	704	0,06	17.578	1,01	25
<b>16 - 20 heads</b>	1.220	0,11	23.100	1,33	19
<b>11 - 15 heads</b>	2.280	0,21	38.925	2,24	17
<b>6 - 10 heads</b>	8.046	0,73	60.077	3,46	7
<b>3 - 5 heads</b>	63.054	5,70	215.013	12,38	3
<b>1 - 2 heads</b>	1.030.129	93,12	1.314.118	75,65	~1,3

## Cows live stock structure

Source MAPDR 01.04'07

Structure of farms (cows and heifers)	TOTAL	
	No. of farms	No. of cows + heif.
<b>First target group</b>	<b>853</b>	<b>68.254</b>
> 100 heads	164	34.382
51 - 100 heads	246	16.892
31 - 50 heads	443	16.980
<b>Second target group</b>	<b>4.204</b>	<b>79.603</b>
21 - 30 heads	704	17.578
16 - 20 heads	1.220	23.100
11 - 15 heads	2.280	38.925
<b>Third target group</b>	<b>1.101.229</b>	<b>1.589.208</b>
6 - 10 heads	8046	60.077
3 - 5 heads	63.054	215.013
1 - 2 heads	1.030.129	1.314.118



EDA  
European Dairy Assoc

M.A.P.D.R.

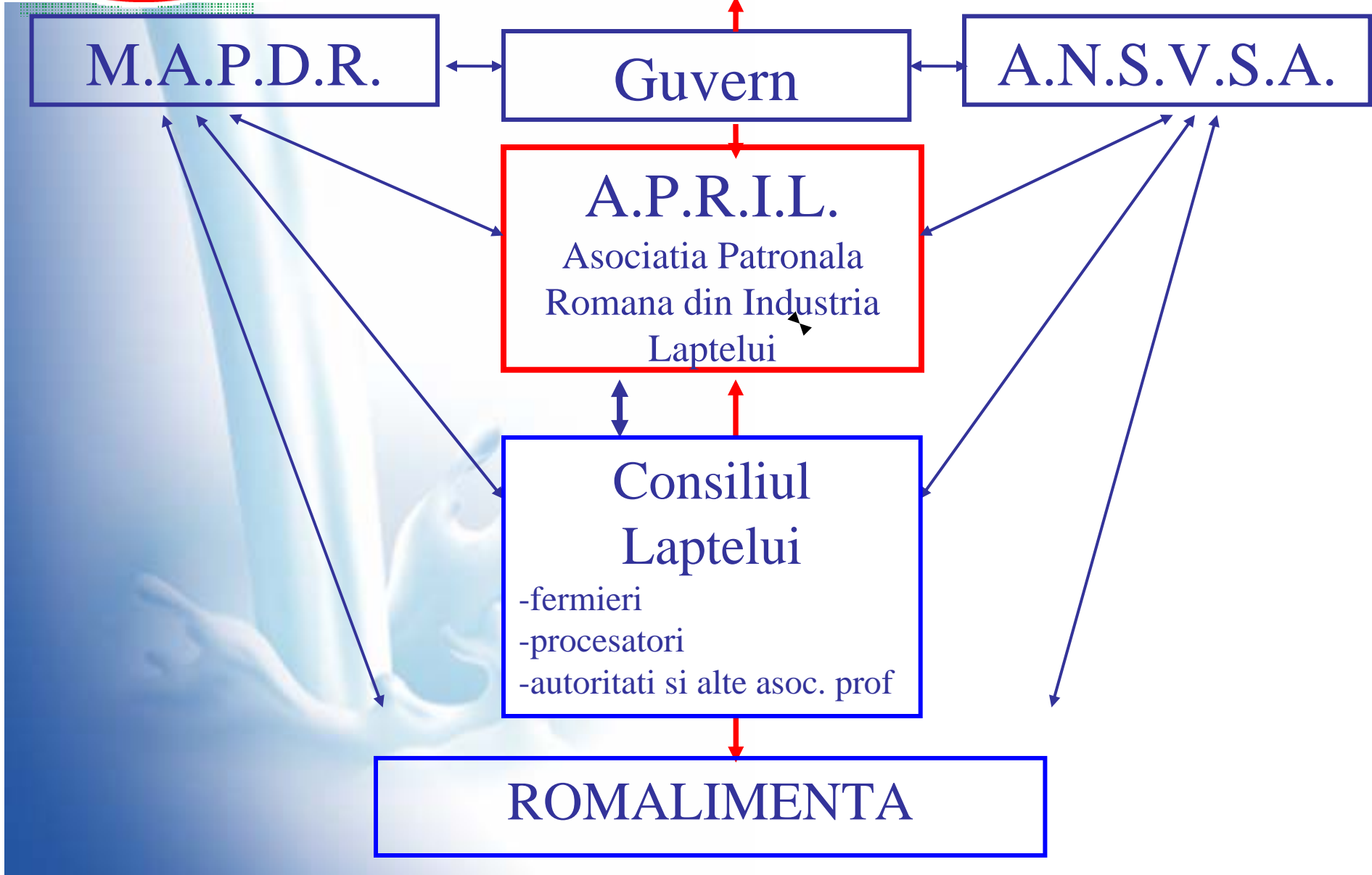
Guvern

A.N.S.V.S.A.

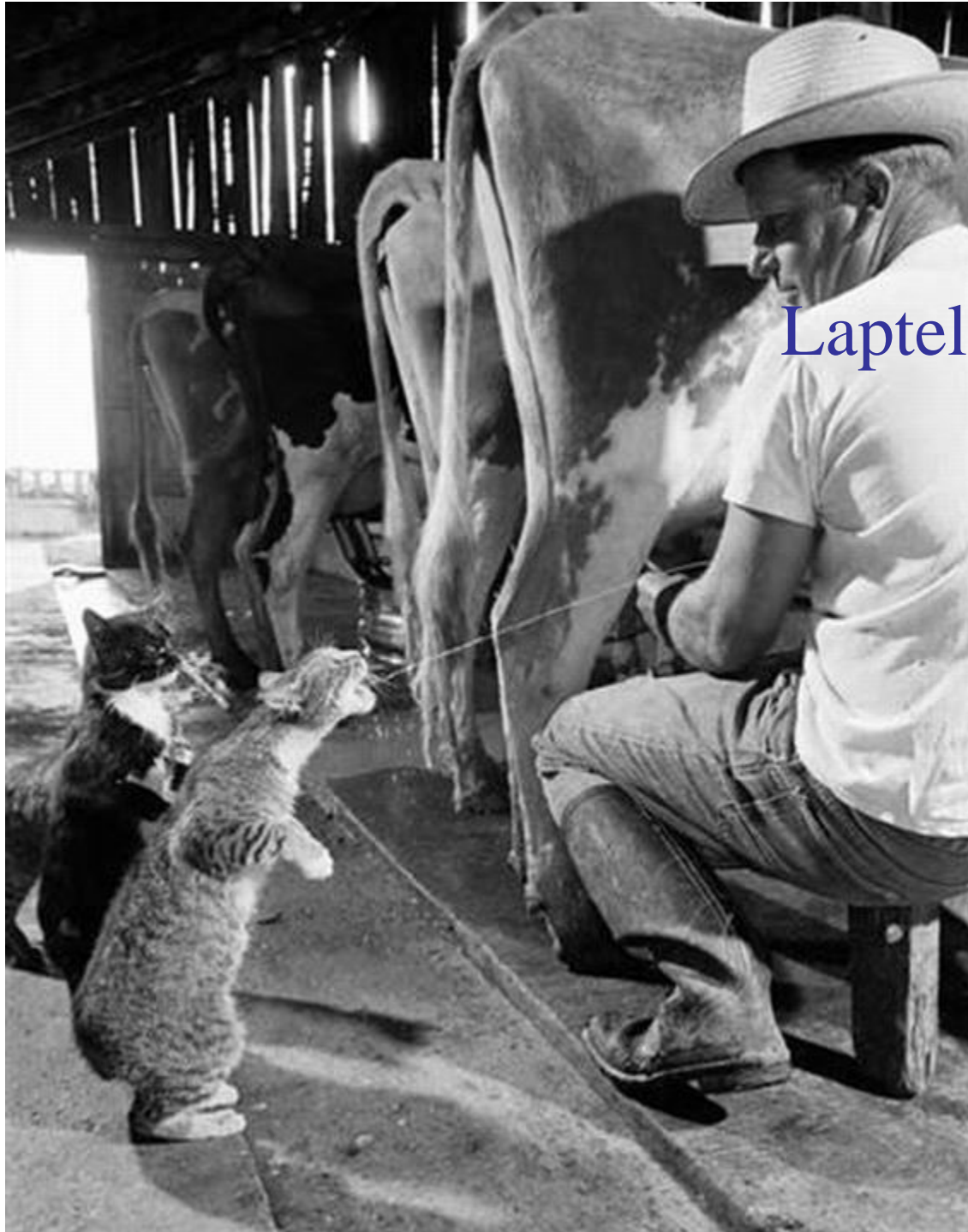
A.P.R.I.L.  
Asociatia Patronala  
Romana din Industria  
Laptelui

Consiliul  
Laptelui  
-fermieri  
-procesatori  
-autoritati si alte asoc. prof

ROMALIMENTA







Laptele este intotdeauna bun.

Cat de bun ?.....  
depinde intotdeauna de...  
**cat de exigent este  
consumatorul**



Ghid de bune practici de  
igiena si de productie in  
industria laptelui si  
produselor lactate

[www.april.org.ro](http://www.april.org.ro)



Întotdeauna pentru atenție !



## **COMPONENCE :**

### **31 MEMBERS :**

- 13 FARMERS ASSOCIATIONS REPRESENTATIVES
- 12 DAIRIES (from which 11 A.P.R.I.L. members)
- 1 member in milk chain (Milk Specialists Association)
- 5 AUTHORITIES REPRESENTATIVES :
  - ✓Ministry of Agriculture
  - ✓Ministry of Economy and Commerce
  - ✓Concurrence Council
  - ✓Ministry of Public Finance
  - ✓Ministry of Environment and Water

# Product Council “Milk and Dairy Products”

Government Ordinance no.45/4.08.2005  
organization of agricultural and food products markets

Law no.307/2005 for approving the Government Ordinance  
no.45/4.08.2005

Minister Order no.1289/2005 for recognizing the  
Romanian Milk Council

