Camel Milk

Research Project to boost the production, processing and consumption of camel milk

PRIMA
PARTNERSHIP FOR RESEARCH AND INNOVATION IN THE MEDITERRANEAN AREA

International Conference: Camel milk overview in the Mediterranean basin

Camel milk value-chain & actors interaction

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Value chain presentation

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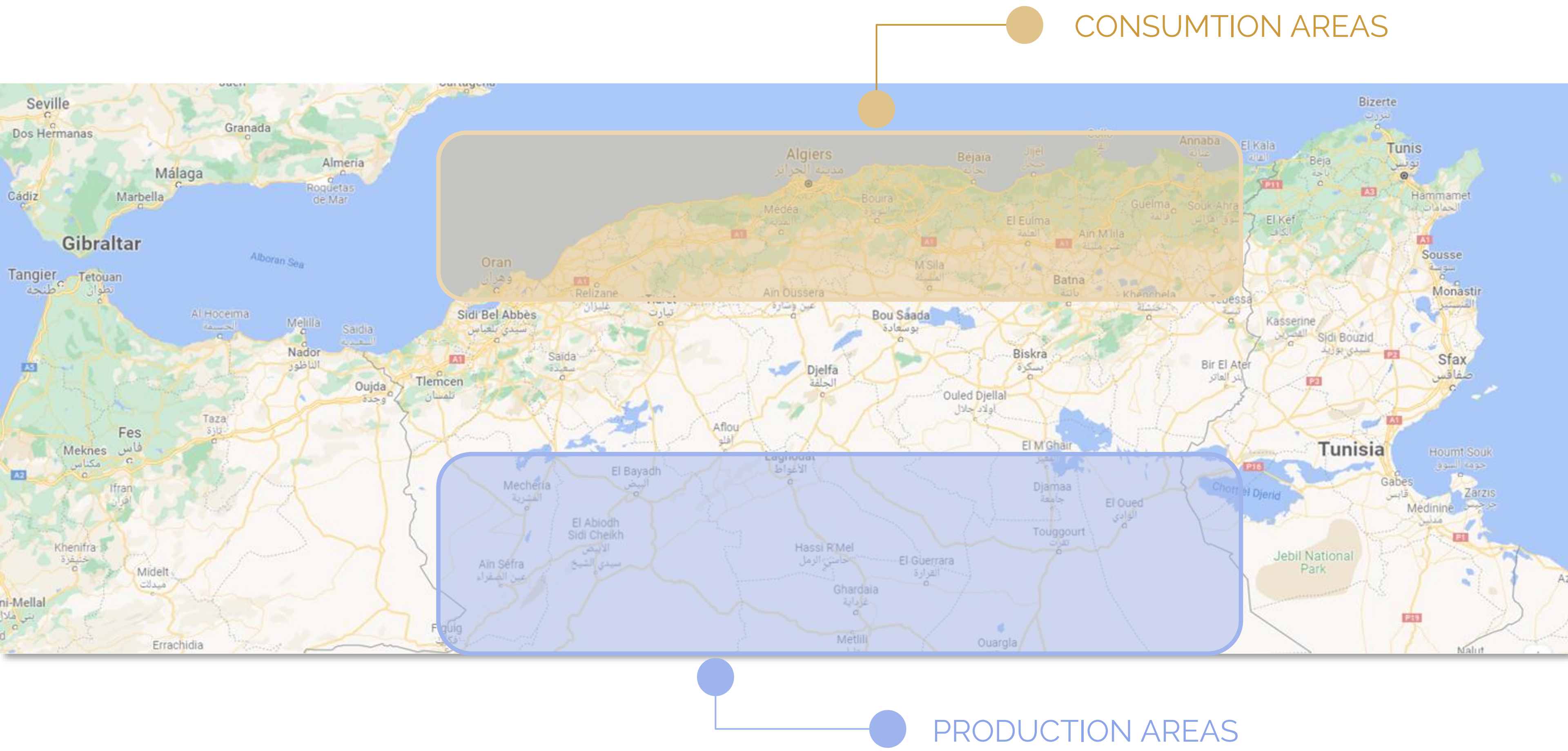
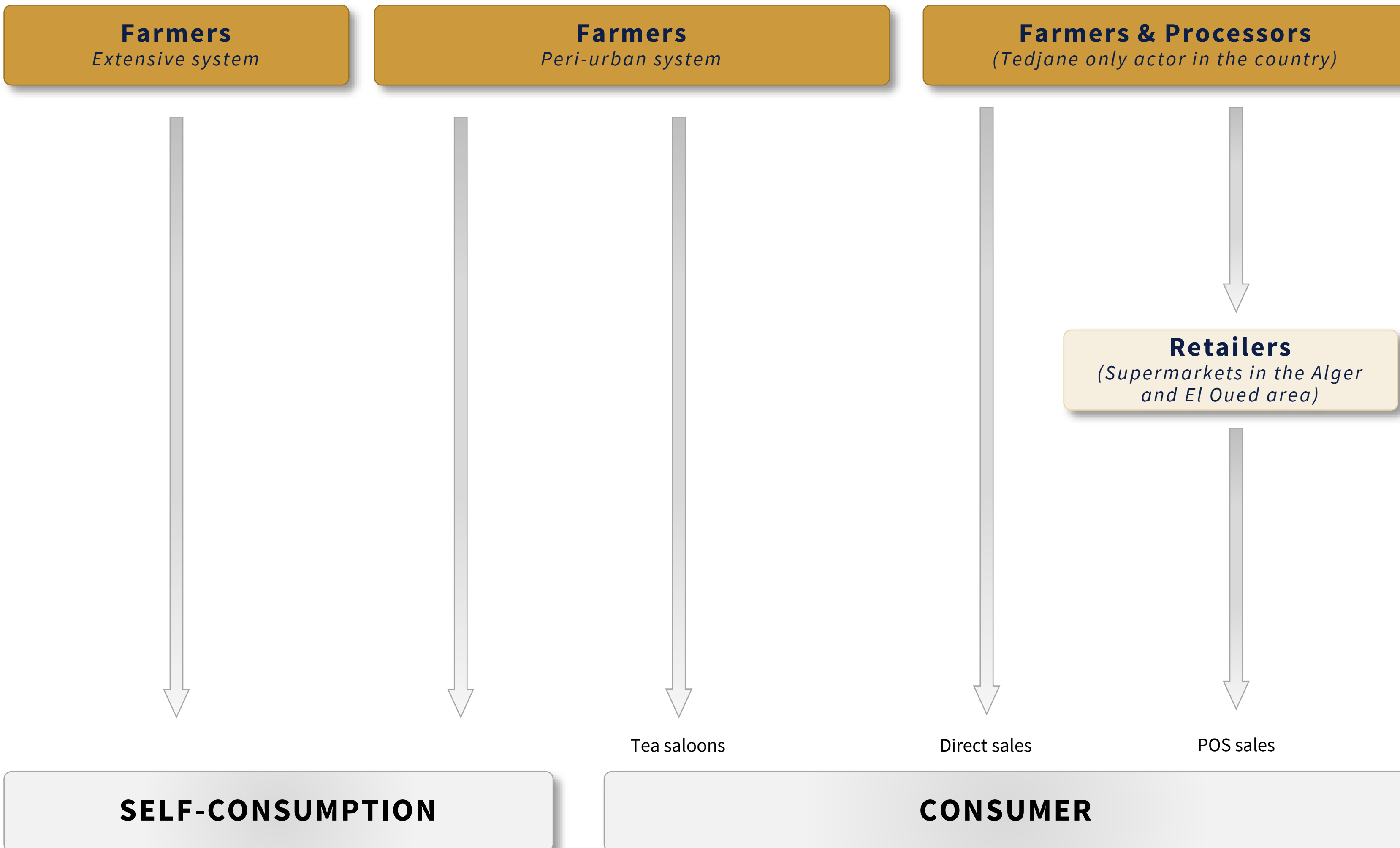
Value chain analysis

Chapter 1

Understanding the context of camel dairy in Algeria

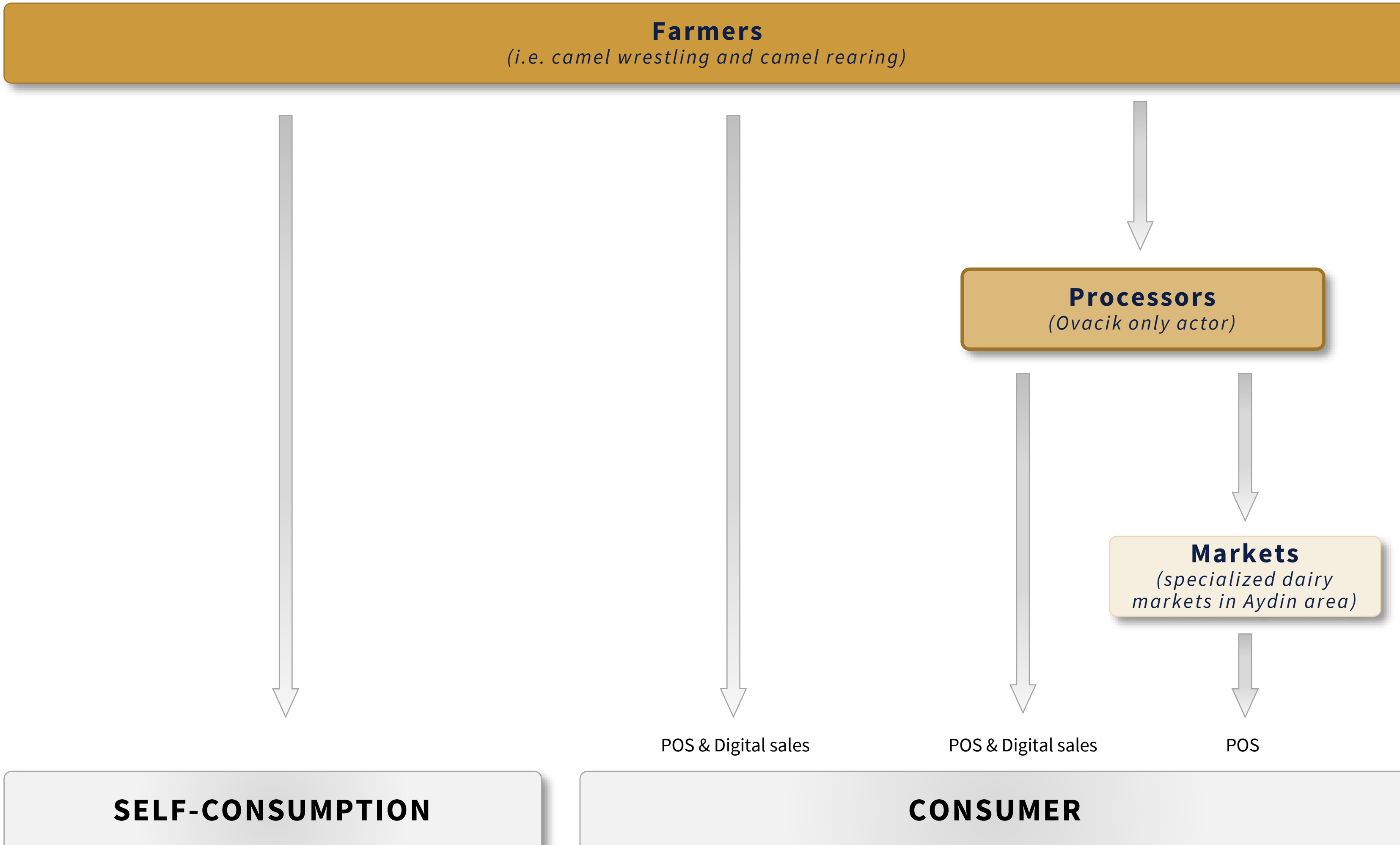


Camel milk value chain – Algeria camel dairy

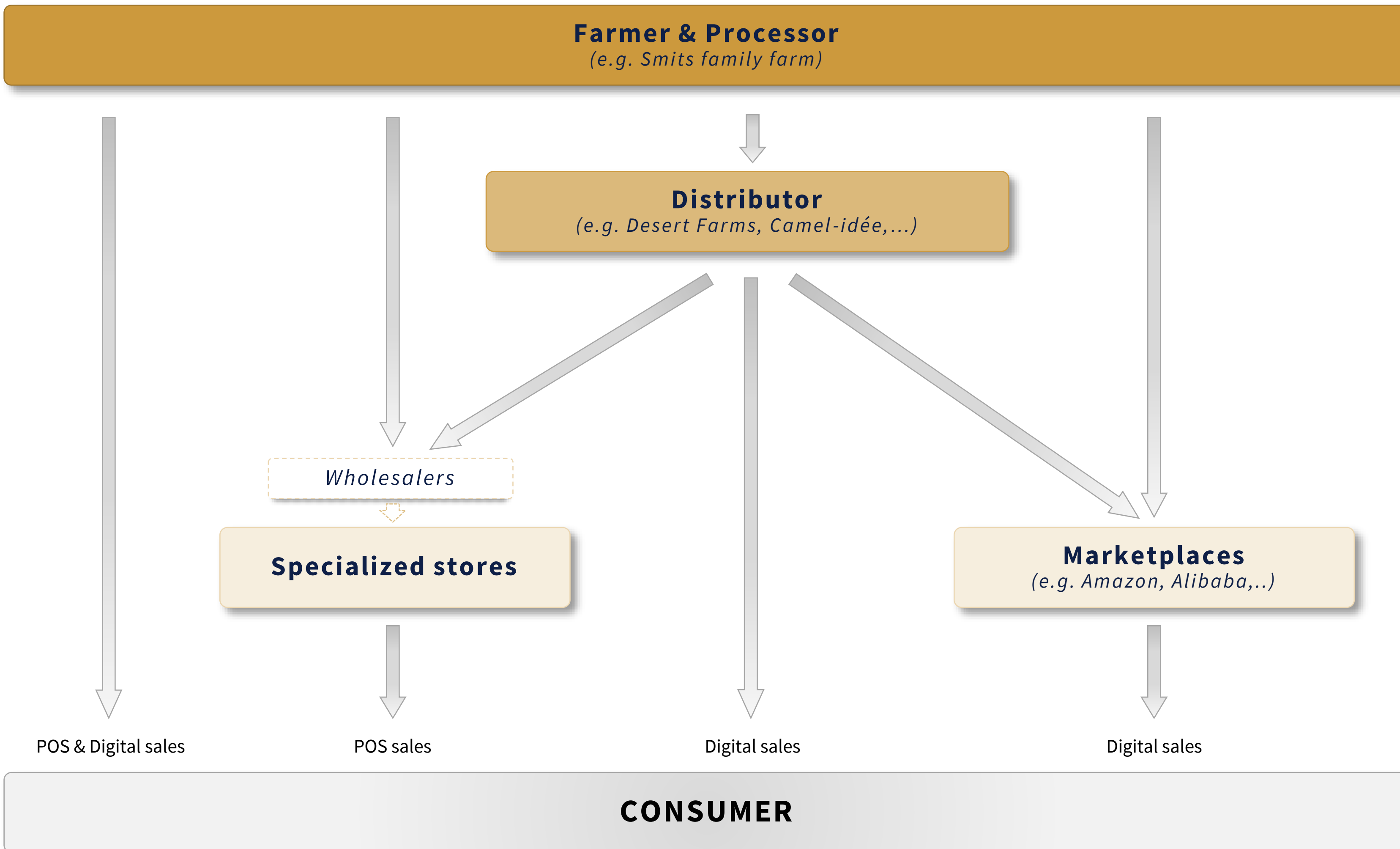


Tedjane's camel products sold in a supermarket in Algiers.

Camel milk value chain – Turkey camel dairy



Camel milk value chain – European camel dairy



Some of the largest camel farms in Europe:

- Most of the European camel **population is in the Canary Islands**, but there are no concrete actors commercializing camel milk there.
- Most of the camel farms in Europe supply the camels from the Canary Islands as imports regulation is easier than from Africa or Asia.

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Price distribution analysis throughout the value chain

Chapter 2

Europe has less of a camel culture compared to Algeria and Turkey, so, where can consumers **find camel milk products in Europe?**

Directly to a nearby **camel farm**

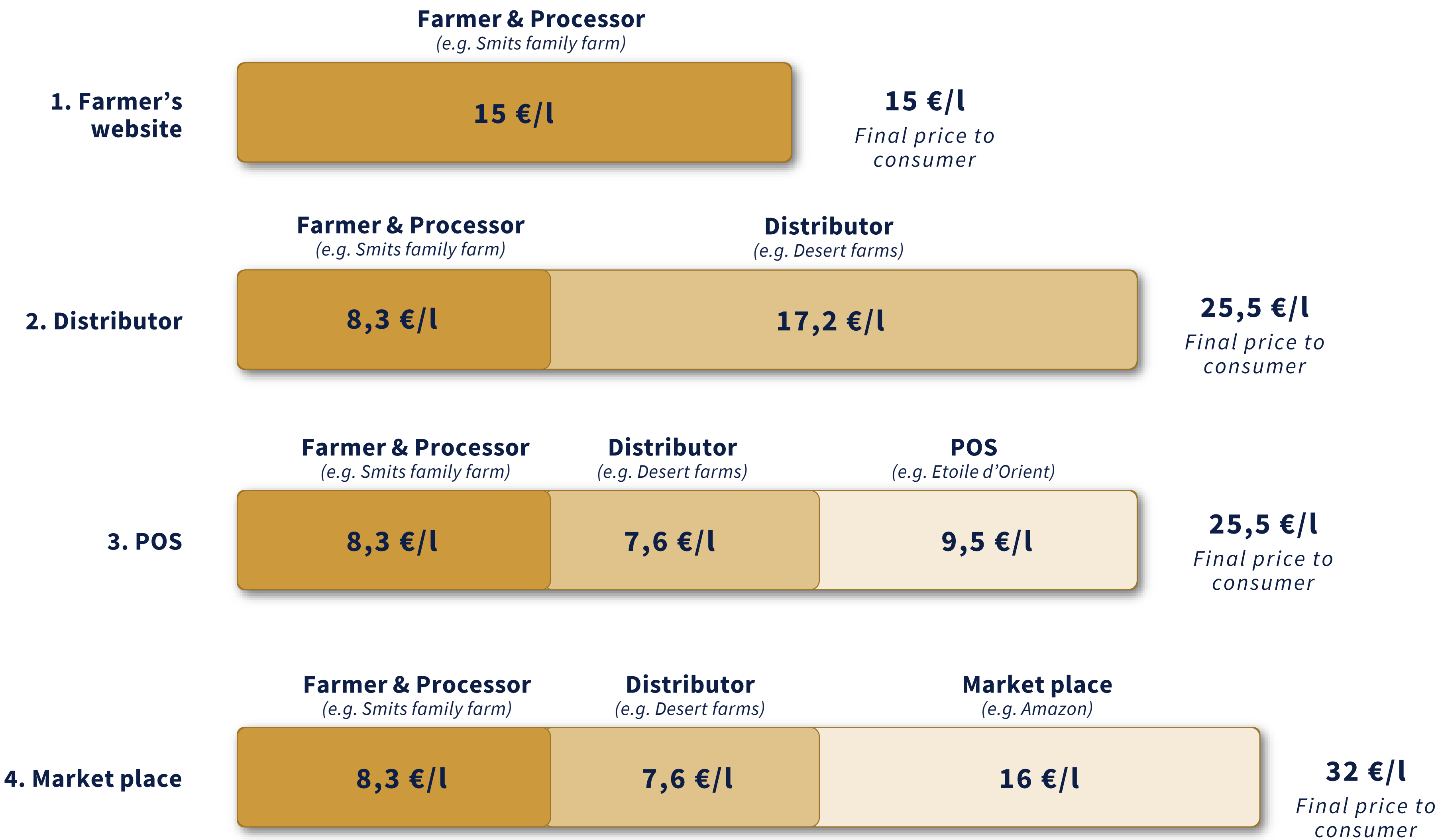
To a **specialized store**:

- Organic gourmet stores
- Pharmacies,
- Muslim/Asian stores

Online:

- Marketplaces (e.g. Amazon, Alibaba)
- Farmers website (e.g. Smits farm)
- Distributors website (e.g. Desertfarms)

Price structure analysis - Europe



Price structure analysis - Algeria

1. Farmer's website

Farmer & Processor
(Tedjane)

4-5 €/l

4-5 €/l
Final price to consumer

2. Mini-market (Alger)

Farmer & Processor
(Tedjane)

4-5 €/l

Mini-market
(e.g. SARL ALLO)

3 €/l

8 €/l
Final price to consumer

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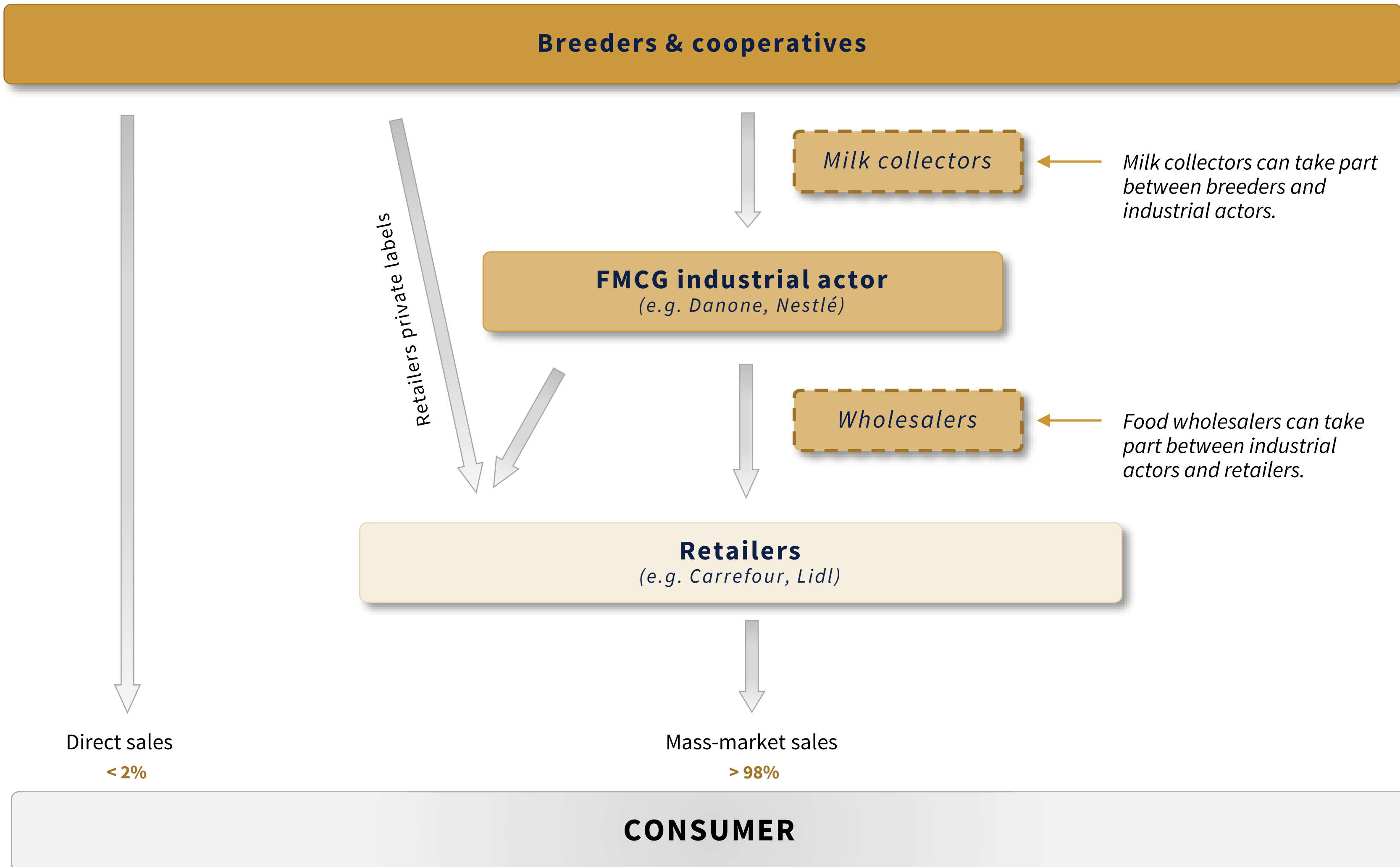
Cow milk value chain benchmark

Chapter 3

Cow milk simplistic value chain



Conclusions of the benchmark:

- Unlike cow breeders, **camel breeders have no visibility of the chain**, horizontally (who are the other producers), nor vertically (potential partners like distributors, how to position my products). Cow breeders clearly know what is the current market price of milk.
- Mass-market chains like Carrefour or Lidl have the most power in the chain. They fix the prices and **any price reduction is mainly assumed by the producers**.
- There is a **huge price gap between cow and camel milk** (about 20 times more expensive), except in Algeria where it is just 6 times more expensive.

Our countries are much cow milk dependant nowadays:

	Turkey	Algeria	Europe
Cattle weight in the countries dairy mix	**91%**	**73%**	**97%**

- Camel dairy will never reach the production volumes of cow. Camel population is not as big, and will never be, as cow, and **camels are not as easy to industrialize as cows**.
- Camel dairy products **should not compete against cow milk**. They should position in a different market, to fulfil the needs of a **different niche** than cow milk.

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www.camel-milk.org

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