Camel Milk

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

International Conference: Camel milk overview in the Mediterranean basin

Camel milk value-chain & actors interaction
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Value chain presentation

Structure

1. Chapter 1
   Value chain analysis

2. Chapter 2
   Price distribution throughout the chain

3. Chapter 3
   Cow milk value chain benchmark
Value chain analysis
Chapter 1
Understanding the context of camel dairy in Algeria
Camel milk value chain – Algeria camel dairy

**Farmers**
- Extensive system

**Farmers**
- Peri-urban system

**Farmers & Processors**
- (Tedjane only actor in the country)

**Retailers**
- (Supermarkets in the Alger and El Oued area)

- Tea saloons
- Direct sales
- POS sales

**SELF-CONSUMPTION**

**CONSUMER**
Tedjane's camel products sold in a supermarket in Algiers.
Camel milk value chain – Turkey camel dairy

Farmers
(i.e. camel wrestling and camel rearing)

Processors
(Ovacik only actor)

Markets
(specialized dairy markets in Aydin area)

POS & Digital sales

POS & Digital sales

POS

SELF-CONSUMPTION

CONSUMER
Camel milk value chain – European camel dairy

**Farmer & Processor**
*(e.g. Smits family farm)*

**Distributor**
*(e.g. Desert Farms, Camel-idée, ...)*

**Specialized stores**

**Wholesalers**

**POS & Digital sales**

**POS sales**

**Digital sales**

**Marketplaces**
*(e.g. Amazon, Alibaba, ...)*

**Digital sales**

**CONSUMER**
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.
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

1. Farmer’s website
   - Farmer & Processor (e.g. Smits family farm): 15 €/l
   - Distributor (e.g. Desert farms): 15 €/l
   - Final price to consumer: 25.5 €/l

2. Distributor
   - Farmer & Processor (e.g. Smits family farm): 8.3 €/l
   - Distributor (e.g. Desert farms): 17.2 €/l
   - Final price to consumer: 25.5 €/l

3. POS
   - Farmer & Processor (e.g. Smits family farm): 8.3 €/l
   - Distributor (e.g. Desert farms): 7.6 €/l
   - POS (e.g. Etoile d'Orient): 9.5 €/l
   - Final price to consumer: 25.5 €/l

4. Market place
   - Farmer & Processor (e.g. Smits family farm): 8.3 €/l
   - Distributor (e.g. Desert farms): 7.6 €/l
   - Market place (e.g. Amazon): 16 €/l
   - Final price to consumer: 32 €/l
Price structure analysis - Algeria

1. Farmer’s website

Farmer & Processor (Tedjane)

Final price to consumer

4-5 €/l

2. Mini-market (Alger)

Farmer & Processor (Tedjane)

Mini-market (e.g. SARL ALLO)

Final price to consumer

4-5 €/l

3 €/l

8 €/l
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Cow milk value chain benchmark

Chapter 3
Cow milk simplistic value chain

**Breeders & cooperatives**

**FMCG industrial actor** (e.g. Danone, Nestlé)

**Retailers** (e.g. Carrefour, Lidl)

**Wholesalers**

**Milk collectors**

Milk collectors can take part between breeders and industrial actors.

Food wholesalers can take part between industrial actors and retailers.

Direct sales < 2%

Mass-market sales > 98%

CONSUMER
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:

<table>
<thead>
<tr>
<th>Turkey</th>
<th>Algeria</th>
<th>Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cattle weight in the countries dairy mix</td>
<td>91%</td>
<td>73%</td>
</tr>
</tbody>
</table>

- 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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