

## **Civil Dialogue Group Milk 12.05.2015**

**9h30-18h00**

### **Welcome by the chair and brief overview of today's agenda**

- 1. Approval of agenda and the minutes of the previous meeting – November 19 2014 - adopted**
- 2. Strategic agenda for the period 2015-2022**

In November, all participants were invited to contribute to the strategic agenda. It was drafted by the chairman in co-operation with the vice chairs. Contributions were submitted by FDE, CiWF, FACE, EMB and Eurocommerce.

**Eurocommerce** - There is a need to include all the representatives of the chain, including distribution. In relation to the point on the 'functioning of the dairy supply chain', the focus should be on the chain in its entirety and on each link in the chain. Negative wording should be avoided. In addition, a point on 'consumption trends and consumer demand and necessities' should be included under the category 'market intelligence'.

**EMB** – requests are very similar to Eurocommerce. Producers need to be specifically referred to in the document. Margins should also be directly referred to in the document. (COM response – margins are addressed in the market situation presentations).

**Chair** – Milk Package follow up. Practice of different milk prices could be addressed here.

**Copa** – request to see the new version in writing after lunch so that there can be a decision then. A compromise wording has been put forward on the point on the functioning of the dairy supply chain – i.e. 'working for closer collaboration and addressing any unfair practices'.

**Strategic agenda adopted later in the afternoon in an amended version.**

### **3. Market situation**

#### **a) Presentation by COM and comments from stakeholders/exchange of views**

- February production figures were presented. March figures will be available in coming days.
- Milk deliveries were down by 1% in the first two months of 2015. Despite the current milk price situation and the risk of having to pay surplus levy, milk deliveries have increased in 9 MS.
- Looking at the quota year (Apr-Feb 2015 / Apr-Feb 2014), milk deliveries have increased by 3.3%. During this eleven month period, milk collection increased in all Member States except Greece.
- Non-official data from Germany and France show a decrease in milk production in April (when quotas were removed) by 1.7% and 3.3% respectively.
- EU average farm gate milk price decreased by 0.9% in March, compared to previous month to 31.6 c/kg. This is 20% lower than last year but 6% lower than the previous 5 year average price. Estimates for April price are not complete yet, but no big changes are expected. Compared to March 2014, the price drop has been sharper in the Baltic Member States, followed by Denmark, Belgium, Luxembourg, Sweden and Germany. .

- Milk production margin index fell in 2014 despite stability in operating costs – due to price cuts.
- Dairy commodities' prices have increased since the beginning of the year in absolute terms. However they are now in a downwards trend. EU average prices for SMP and butter are respectively 13% and 38% higher than the Intervention Price.
- Price evolution in the year and in last 4 weeks:

	2015	Last 4 weeks
SMP	+4%	-6%
Butter	+7%	-4%
WMP	+9%	-7%
Cheddar	+1%	-2%
Edam	0%	-1%
Wheypowder	+1%	-2%

- International markets: US currently has lowest SMP quotation despite the strong \$. Oceania has lowest WMP quotation. There is very high domestic demand for butter and cream in the US and low stocks, therefore US prices are high when compared with those in the EU and Oceania. EU cheddar is currently the most competitively priced – a once off in the context of historical cheddar quotations.
- World trade – broadly speaking, based on Jan-Feb results, the trend is for lower volumes traded than last year. Total exports (in milk equivalent) from the global top 8 exporters is down by 9%. EU total exports are down 1.5% (also in milk equivalent). EU butter exports are on a very similar level to last year, WMP exports have fallen somewhat, EU SMP exports have increased by over 20,000 tonnes but volumes destined for Algeria (the main market for EU SMP), have fallen by 14%. Cheese exports from the EU are down 18% on last year, mostly due to the impact of the Russian embargo.
- Significant decreases in Chinese imports have taken place. Total WMP imports have fallen 42%. Butter and cheese import volumes are quite low but the EU's share of total imports has increased for both.
- US and Japan have increased their imports of cheese. EU has increased its cheese exports to the US by 16%. Mexico is also looking to the EU to supply cheese (US cheese is either scarce or too expensive).
- Global production: in the US, milk prices are low and the drought in California has led to a decrease in output. Australia has seen positive results for their season and an increase in output. After a drought in February, now it's raining again in New Zealand so production is picking up once more.
- GDT price index is -3.5%. Lowest in 2015. Only positive result was for cheese.
- Update on MMO meeting of 29.04.2015. Report is available on the MMO website. 'Dashboard' was introduced at the last meeting. This will be updated every Thursday and will allow for all information to be accessible in one document.

Market updates by Eucolait:

**Butter:** Living in post quota era makes analysis difficult. The global butter market went up in February and went down in March (Oceania drought had a limited effect). Global imports of butter are down 31% (based on information from January and February of this year). This is due in part to the Russian embargo and China, which considerably increased its imports last year. Due to the unfavourable \$/€ exchange rate, America is not very present on market at moment. EU has maintained its presence at 2014 levels.

EU butter production increased slightly during the first three months of 2015 (+0.3%). EU butter prices reached a low at the end of 2014, went up between Jan and March 2015 and started falling again after that. A projected 1-2% increase in milk deliveries in 2015 should lead to butter production 4.6% up on 2014 levels. EU consumption is mature (little scope for growth) so growth in demand will have to come from outside of Europe.

**Powder:** The tendency towards lower prices has continued. SMP is now at 1730€/tonne. Gradually the intervention price (1698€/tonne) is in view. The big questions now are if we will see SMP going into intervention and when? The milk flush will take place within the next two weeks and intervention could happen then. WMP prices have fallen in GDT and also in the EU. Latin America is not moving along despite an announcement of new tenders. Overall US production of milk will be high – feed ratios are still up and it is good for farmers. In the EU, farm investment has taken place in advance of the end of the milk quota regime. Milk production is pulling out of the quota valley. Doubts that low prices will affect production in the beginning of the post quota era (investments need to be paid back and the way to do this is the produce milk).

**Cheese:** The situation varies between Member States. Data provided by the Commission does not provide a detailed snapshot of what is happening in individual Member States.

Fair return for primary milk production will depend on what is done with this milk. E.g. in Italy, there are PDO/PGI cheeses, but these form only part of the market. All milk prices cannot be based on high value cheeses. The economic crisis has seen consumers switch to cheaper products and a fall in overall consumption. In Italy, cheese prices are lower, but stable.

EDA – The peak in production is expected to come in mid May. The Russian market needs to continue to be a topic of discussion. Russia was a major market and it seems that politicians have forgotten how much the Russian market contributed to good developments in the past.

Copa – situation is getting more difficult week on week. Volumes will not substantially increase because farmers lack the finance to increase the production and cannot pay the bills.

Cost of production model in the UK – 15% of UK milk supply is currently receiving 44c/l (this is the amount needed to make a margin). Average UK milk price is 28c/l.

Surplus levy payments will be due at the end of the year. Copa wishes to see this put into the dairy sector.

Russia has had a major effect on the EU market. This is why the intervention price needs to be assessed. COM response: fixing intervention prices is a matter for the legislator – from a procedural point of view, there are two options to address this – change reference thresholds in the CMO Regulation 1308/2013 or change public intervention prices in the fixing Regulation 1370/2013 – such a move would require an impact assessment, and would need to fit into the priorities of the Commission.

EMB – The EU should be taking advantage of the high prices in the US and increasing exports to the US. (COM response – EU exports to the US in Jan-Feb have increased). The end of the quota was a

mistake – only a month in and already there is major concern. Looking at prices in the individual Member States – the end of the quota has not been experienced in the same way across Europe. A crisis needs to be declared now. How was the average milk price of 31,75c/l in the Commission presentation calculated? COM response – this is a weighed average price (weighted by the production of each Member State).

Cogeca: Within the EU, there is a depression of market as result of the crisis. Co-operatives continue to occupy the ‘marginal’ spaces in every Member State; ensuring that areas remain viable and that the environment is protected. Butter price (EU average) is 307/100 kg. Consumers pay 600/100 kg. Who is benefiting?

### **b) Short and medium outlook**

Jan- March 2015: There has been a reduction in production compared to 2014 in the MS at risk of exceeding quota like DE, BE, NL, IE, DK (quota expiry on 31 March), but also in other countries like FR with a production well below quota because of price development and other tools used by operators to manage supply. Some other MS have produced more in Q1 2015 than in Q1 2014 – PT, HU, CZ, UK, FI, and LT. There might be a delay in the milk production peak this year and EU milk collection will increase compared to last year in the remaining months of the year. There is currently no sign contradicting the 2015 forecast of +1.2% increase in milk deliveries compared to 2014 published in March this year .. CLAL and Informa forecast a lower production increase for 2015 compared to the EC.

USDA in May reduced its outlook for US production based on the California drought. With the increasing US domestic use, it will leave extra scope for the EU on export markets and extra scope for EU exports to US.

April to December figures– there has been no explosion in production since the end of the quota but increases are expected, especially in IE but also in FR and DE.

Exports – increases for SMP, butter, cheese and WMP are expected. There will be increased internal consumption for cheese. Internal demand for WMP is important (i.e. chocolate production). The working assumption is that the Russian import ban will be lifted in August but it is hard to say what will happen eventually.

Medium term prospects are favourable for the next ten years. There will be a 2% annual increase in global demand (180 million tonnes). A lot of this global demand will be met by increased production in the developing countries themselves e.g. India, which will soon become global number 1 country for milk production. However, world imports will also grow (+2.1% per year) and the EU will be the main supplier of this additional demand (together with New Zealand and the US).

Most of the extra milk will be channelled into cheese in the EU (also to supply domestic market). EU comparative advantage is in SMP exports (WMP is covered mainly by NZ). EU is also competitive on whey.

Ceja –Management of volumes is however becoming more complicated now that the quota is gone. When is the price situation on the farms going to recover?

Copa – cheese exports – where will this cheese go or do we assume that RU will come back on stream? COM response – Japan and US have increased demand. There is an assumption that RU will lift their ban (it is a question of when however).

Copa - The term ‘white gold’ should be used cautiously as farmers have to work very hard to produce milk. It is difficult to offset costs only by increasing production.

EMB – the spot market price for milk has gone down to 18c/l in the Netherlands? COM response – information on spot markets is part of the overall picture but is far from being representative for the total market. Most of the time, spot prices relate to quantities that did not find their way through usual channels. The low level recorded in the NL was due to a temporary problem at peak production time.

#### **4. MiFID state of play**

Futures and derivatives are being widely used in the sugar and cereals markets. For dairy it is not yet so developed. MiFID (Market in Financial Instruments Directive) process started in 2008 and it is nearly in its final stages.

MiFID aims to provide for more efficient markets and more transparency and to increase protection for investors. MiFID entered into force on 3 July 2014 – but the whole system will only be in place at the beginning of 2017. A distinction is made between delegated acts and implementing technical standards (prepared by the European markets and security authority). COM will still have the last word on the standards.

(European Market Infrastructure Regulation) EMIR has been in force since 2012.

Detailed rules in relation to agri trading. E.g. position limits (these are already in place in the US). The rules are quite strict, however there will be ancillary activity thresholds, (i.e. for companies with non-excessive use of financial instruments).

Expert Group on Agri Commodity derivatives and spot markets: Eucolait is a member but there is more of a focus on cereals.

Ceja – very complicated matter and there is a lot of controversy as food is at stake. The FAO report on speculation draws a link between commodity price volatility and speculation. Speculation needs to be limited in so far as possible.

EDA – Industry is not involved in the working group. EDA has had internal discussion and has reservations (so many different products in the dairy sector). Dairy products are different to sugar and grain, which are highly standardised. Concerned about that which can really be achieved with this.

COM response – regulatory framework is a result of the financial crisis. Speculation – damage caused by this has not actually been proven. Without speculators, there is no liquidity on the market and without liquidity, the market does not function.

#### **5. CAP and market management**

##### **a) PSA update**

PSA for butter and SMP is maintained until the end of September 2015 because of the fragile price situation. SMP is a new product for PSA. In the past, COM tried to avoid having simultaneous intake and outtake. This is now different and much more flexibility has been placed in the hands of the operators.

Since September 2014 some 3% of the annual EU butter production has been offered in PSA. Less than 2% of annual EU SMP production has been offered in PSA.

Chair – stock figures in the US are published in terms of ‘days of consumption’. However, data in the EU is not an indication of global stocks (unlike in the US where stock reporting is compulsory).

## **b) Review of the regulations on public intervention and private storage –**

A review of public intervention and private storage is ongoing:

Ongoing process of adjusting to the Lisbon treaty (i.e. splitting provisions into delegated and implementing acts) focussing on simplification / subsidiarity / consistency / reduction of error rates and of administrative burden.

The sCMO taskforce works very well with expert groups and Committees. The work on the delegated act and implementing acts for intervention is almost closed. Once this is finished, the delegated act will be put to adoption procedure. Once adopted by the Commission, EP and Council have 2 months (and max 2 additional months) to object. After this period, the implementing act will be voted and adopted, so that both the Delegated and Implementing acts can be published.

For dairy intervention, following the mini milk package in 2007, there is not much left to simplify:

- The capacity of storage places and the minimum offer size is proposed to be increased.
- Security level remains the same.
- Delivery time shortened- from 4 weeks to 3 weeks.
- Abolition of transport costs if delivery required a journey of more than 350 km. It seldom happened in reality, so it was abolished.
- 'Sweet cream' butter – clarification of what this meant in the intervention regulation. Now 'butter has a pH of 6.2 or higher'.

For the review of PSA, a workshop has taken place, first drafts are now being discussed with experts and Member States. It is likely that the experience of PSA following the Russian embargo will have a bearing on the drafts.

Aim – to close the operation before the summer break. Acts entering into force at the beginning of 2016.

EMB – what about the availability of storage premises for butter and SMP for intervention storage?  
COM – intervention was a regular feature in the past – intervention agency contracting with private facility to reserve capacity. There has been no intervention since 2009, so it is not possible to rent for a period of 6 years. National intervention agencies are following the market and started to look around and reserve space late last year, when it was expected that there would be intervention.

## **c) Review of trade mechanisms – state of play**

Trade mechanisms concerns the import and export quotas managed by the Commission. Several topics have to be brought into line with Lisbon. There have been 7 workshops throughout 2014 and a meeting in January 2015. Next step – drafting of delegated and implementing acts. The problem is that there is a wide range of management systems for different products. Making a delegated and implementing act for everything would result in some 60 acts.

Electronic system – the system of import and export licences will be adapted to a new IT environment. There will be a platform to connect the systems of the Commission, national customs authorities and the agencies.

It is the Commission's intention, in the process of the lisbonisation, to merge all sectoral quota regulations on tariff quotas with the current horizontal regulation (R 1301/2006) into one delegated and one implementing act.

The same exercise will be carried out for licenses and export refunds (horizontal regulations R 376/2008 and R 612/2009), including the related milk regulations on trade provisions (R 2535/2001 - R 1187/2009).

As regards quota management, a first choice should be made between the First come first served system, managed by TAXUD, and the quota management with licences by AGRI. It will be assessed for each quota which system is the most appropriate. NZ butter quota has been laid down in an international agreement so it cannot be changed in this review. Licence security will also be subject to harmonisation.

Some more internal reflection needed. A line to take should be decided on next month. There is the hope to have adoption of delegated and implementing acts by the end of the year.

EDA and Eucolait have submitted their comments. Other stakeholders are also welcome to comment.

Eucolait –there should be flexibility in terms of proofs of arrival and alternative proofs of arrival should be accepted.

#### **d) Report by MEP Jim Nicholson**

Following the Commission report on the Milk Package in June 2014, this is an own initiative report by MEP Jim Nicholson (ECR, UK).

The draft report was published on 24 February. A hearing in COMAGRI took place on 27 January with participation of several stakeholders. .

482 amendments were submitted. The rapporteur and the shadow rapporteurs are now coming to compromise position. The report is planned to be voted on 26 May in COMAGRI and then the plenary vote will take place. Next plenary is the beginning of June, but it could be July by the time there is a vote. The final report will then be sent to Council and Commission.

#### **e) EMB – the market responsibility programme**

EMB - There are many reasons to justify such a programme. The Dantin proposal two years ago was a *bonus malus* system. The idea is not for a permanent instrument, but rather to provide for a crisis. EMB is grateful for suggestions and contributions from other participants. A legislative basis is needed.

Market index would be set up, co-ordinated from the observatory. It would involve using the data that already exists in an intelligent way. Market index would be set at 100 (normal situation, where production costs are covered).

Distinction between 3 phases:

1. Early warning phase (market index falling by 7.5%)
2. Crisis phase (market index falling by 15%)
3. Obligatory cutback phase (market price falling by 25%)

From the moment a crisis is declared, it is left to the individual farmer to decide how he/she will react.

Eucolait – how is this index constructed? How are all the different elements weighted in the index? (feed, energy costs etc.)

Copa –the ideas are outdated and difficult to implement. The EU ran the risk of progress on export markets because of quotas (agreed for 31 years). Who would pay for this? Also, this is a game which

would need to be played fairly by all in the EU or just by some producers and not others and imply solidarity between farmers.

Ceja – if the global markets are not offering remuneration then what is the point in producing for the global market? Farmers are the weakest link in the chain.

Copa – this represents a bureaucratic, administrative system. Quotas put a constraint on farmers 31 years ago because EU price was 30% above the global market price while today the EU milk price is the global milk price. This should put a constraint on young farmers. How will this market responsibility programme be financed? Most dairy producers nowadays are business people, who would respond to market signals. The cost of such a programme is worrying.

EDA – it is a world market. If we just want to look at the EU, we close the borders, however we know that the increase in demand for dairy will not come from the internal market.

EMB response - All participants on the market will benefit, even retail, as enormous fluctuations will be avoided. There will always be competition but at a different level.

Financing – considering a mix form a levy and the crisis reserve. €450 million EU crisis reserve – half of this could be used for the dairy sector

Taking 0.5c/100 kg over six months from farmers would also be an option for financing.

EMB reference to the US policy as an example– Margin protection programme: However for COM, despite the name, programme does not protect real margins. It is different to EMB's proposal. Optional programme: Farmers pay a premium and then receive a counter cyclical payment when a margin index (based on average milk price and feed costs) reaches a certain level.. The payment received is not based on an individual farmer's margin.

First Farm Bill proposals included a complementary supply management scheme but this was not maintained.

Only 50% of dairy farmers in the US have applied for this, despite the almost free (only 100\$ per farm) entry level. It should be taken into consideration that in the US there are no direct payments to farmers.

#### **f) Marketing standards**

Part of the simplification exercise. The aim is to improve the consistency of the legislation. A meeting with Member States took place on 5 February to discuss minimising administrative burden. At another working group meeting on 12 March, Member States were asked whether current marketing standards were fit for purpose.

Most marketing standards for other products e.g. fruit and vegetables are determined at Commission level. For dairy, these are set out in the CMO. Exceptions to milk terms and spreadable fats to be discussed. However it is too soon to say what exactly the focus will be. Spreadable fats – certain aspects which were not taken into account in the revision of the CMO in 2013 (Regulation 1308/2013). However the broad lines of marketing standards in Regulation 1308/2013 will not change in the near future.

EDA – happy to hear that the provisions protecting dairy denominations will not be touched.

#### **g) School Milk scheme – state of play**

COM: The current school schemes (school milk scheme and fruit and vegetable scheme) operate within different legal and financial frameworks and have important differences in their functioning.



The Commission proposed in January 2014 to merge the two current schemes into a single EU-wide scheme. Discussions took place in the Council and a progress report was adopted in June 2014. COMAGRI adopted its report in April 2015. The EP approved amendments to the draft regulation on 27 May 2015.

The Commission decided in its Work Programme 2015 to further evaluate the entire school scheme regime for subsidiarity, proportionality and better regulation reasons. Member States and stakeholders were invited to share their views in a targeted consultation meeting on the current school schemes. The Commission draft evaluation report which contains the findings of the assessment has been published on 12 May. Interested parties were invited to comment by 3 June 2015. The Commission will consider how to proceed with the proposal.

Under the new requirement as set out in the CMO Regulation 1308/2013, MS are obliged to prepare a strategy for the school milk scheme. The Commission Delegated Regulation (EU) No 1047/2014 lays down the rules for the strategy that MS participating in the SMS are required to have in place by 1 August 2015. MS shall submit their strategies to the Commission by 1 July of each year.

EDA would like to see the future school scheme extended to all products (including flavoured and unflavoured fermented milk).

Myths need to be debunked – providing milk in schools is a good way of increasing milk consumption in children. Flavoured fermented milk and milk products are linked with higher total milk consumption and a better overall diet, without an adverse effect on weight.

Cogeca – important not just from a market perspective but also from a health perspective. Would like to see high quality cheeses going to school. Combining milk and cheese distribution with visits to plants and co-operatives – this is common in Italy.

## **6. Food law and quality issues**

### **a) Study on mandatory origin labelling**

Not published yet. Was due to be sent to EP and Council by 13.12.14.

Study will be published on the same day that it will be adopted by the Commission.

### **b) Organic production- update on trilogues**

Trilogue has not officially started. Organic proposal was released in March 2014. Council meetings, special committees on agriculture, working party meetings have been happening since then. Under the Italian presidency of the European Council (July to December 2014) technical reading was concluded. This laid down a good basis for continuing.

Main objective of current Latvian presidency is to achieve a 'general approach'. Has not happened yet. The decision has been postponed to the farm council in June. Disagreement remains as regards pesticide residues and frequency of controls. COMAGRI has yet to release its draft report. ENVI will provide an opinion on this report. Scheduled for July plenary, may take place in September plenary.

If there is no agreement soon, the proposal will be withdrawn from the Commission work programme. No new proposal could be submitted for the next two years. However, if there is no agreement by the end of the Latvian presidency, (but agreement in September) this gives some room for manoeuvre.

IFOAM – current rules act as a barrier to new entrants. There is increased demand for organic products. There is an issue as regards organic fodder in Ukraine.

COM – there is so much flexibility that that which works in one MS will not work in another. The new rules aim to create a level playing field.

## **7. External trade**

### **a) Need for harmonised EU veterinary certificates**

Eucolait – There are concerns with the health certificates for exports to third countries as some of them require guarantees that are not in line with the international recommendations or are not proportionated. The official veterinarian that should issue the export certificates are not in a position to provide the guarantees on these requirements and therefore refuse to certify them. Some third countries do not accept those certificates that do not contain such guarantees and therefore do not authorize the imports of EU products. The Australian case was presented as an example, where according to its national law, raw milk cheeses should be accompanied by a certificate guaranteeing that they have not been produced with milk from animals feed with silage.

EDA – Raised the question of the “Born and Raise in an specific Member State” that is requested by some Third Countries and that jeopardize the application of the principle of free circulation inside the EU.

COM – export certificates should reflect the health requirements of the importing country and cannot be imposed by the exporting Party. According to WTO-SPS agreement, each Member has the right to decide its own level of protection, therefore each Member can decide if it follows the recommendations of the standard setting organizations (Codex, OIE) or if, following a scientific opinion, they establish a different level of protection.

The Commission has agreed harmonized exports certificates with some third countries with whom the EU has established Agreements. In accepting these certificates, the Commission ensures that they don't include requirements that are not in compliance with the WTO-SPS Agreement and that clauses against the EU principles, like the “Born and raise” one, are not included on it. However we know that this is usually accepted by Member States in order to get access to the market of some third countries.

## **8. CIWF (EEB) - Welfare of dairy cows in the EU**

There is no specific dairy welfare legislation (unlike for pigs, calves, laying hens, broilers). Council of Europe made recommendations in 1988.

Petition from 300,000 EU citizens submitted last year – calling for specific rules for cows.

Bad systems and practices outlined – tethering, permanent housing (zero grazing), lack of comfortable spaces, cubicle size being too small etc. Some problems were due to lack of personnel on farms (2012 own report in DK, DE and ES). There is an emergence of mega dairies or ‘factory farms’ in the EU. Small and medium farms are disappearing.

Cows are bred selectively for high milk yields – meaning that the cow is completely spent after only three or four cycles and has to be culled.

There is a need for enforcement of general legislation (Directive 98/58) and specific rules for dairy cows. A fair price for milk, in which higher standards are reflected would be a positive development. Animal welfare, environment and farmer friendly approach. Possible welfare labelling.

Copa – Percentage of EU population reflected in petition is minute. The images in the presentation should not be blown out of proportion. The neighbouring farmers will not allow a farmer to keep the cows in those conditions. Mega herds should not all be tarred – some mega herds are top quality cows, with high welfare and very productive.

Cogeca – The presentation is very one sided. There is also a responsibility to show the positive side of dairying. Variations of standards do exist. The study portrays all farmers in a very negative light. An objective approach needs to be adopted to this.

EDA – animal welfare is essential to provide product at the end.

Chair – a bit more justification would be needed to substantiate the presentation.

CIWF – this is a meeting of civil society – not just industry. The fact that there are good farms represented in this room does not mean that all farms are good. It is in the interest of the industry that cows are well maintained.

Copa – Greece has a problem with pasture – there is not enough available for grazing of dairy cows because it is mostly utilised by sheep and goats. Message that indoor feeding is always bad is not helpful.

CIWF – General society are not necessarily industry representatives but are concerned about animals. CIWF tries to talk to as many farmers as possible.

## 9. AOB

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Next meeting – tentative date – **early November 2015**

### Disclaimer

"The opinions expressed in this report represent the point of view of the meeting participants from agriculturally related NGOs at community level. These opinions cannot, under any circumstances, be attributed to the European Commission. Neither the European Commission nor any person acting on behalf of the Commission is responsible for the use which might be made of the here above information."