

الگوی مصرف لبنیات در ایران و جهان

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CODEX ALIMENTARIUS DEFINITION FOR MILK PRODUCT

- Codex Alimentarius defines a milk product as a :

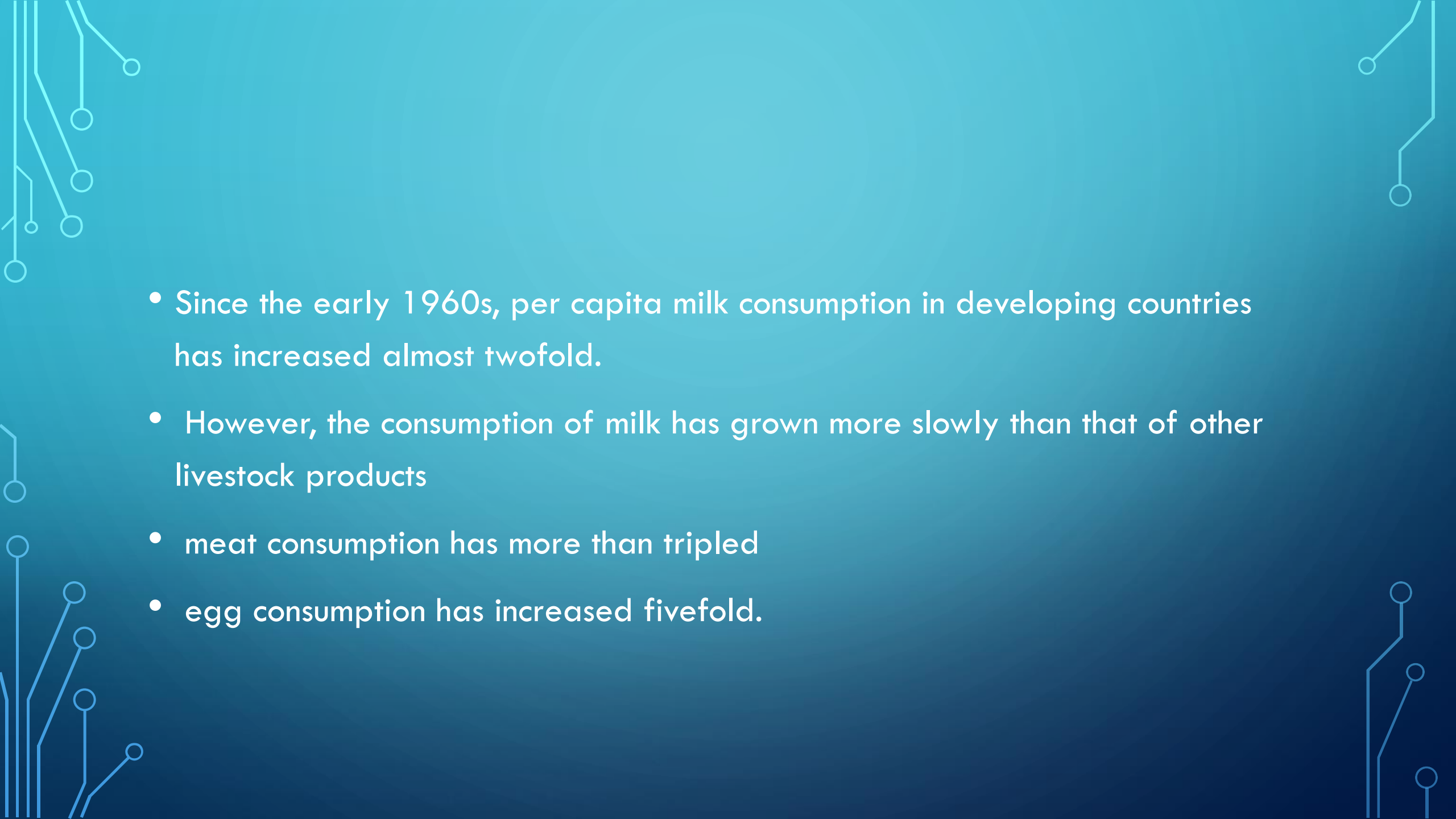
“product obtained by any processing of milk, which may contain food additives, and other ingredients functionally necessary for the processing”.

WORLDWIDE MILK AND MILK PRODUCTS CONSUMPTION

- More than 6 billion people worldwide consume milk and milk products
- the majority of these people live in developing countries.
- The range of milk products varies significantly from region to region and among countries in the same region,
- The per capita consumption of milk and milk products is higher in **developed countries**, but the gap with many developing countries is narrowing.

EFFECTIVE FACTORS ON VARIATION OF MILK AND MILK PRODUCTS

- Dietary habits
- The milk processing technologies available
- Market demand
- Social and Cultural circumstances.

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- The slide features a blue gradient background with abstract, light blue circuit-like lines in the corners. These lines consist of vertical and horizontal segments connected by small circles, resembling a stylized electronic circuit or data network.
- Since the early 1960s, per capita milk consumption in developing countries has increased almost twofold.
 - However, the consumption of milk has grown more slowly than that of other livestock products
 - meat consumption has more than tripled
 - egg consumption has increased fivefold.

EFFECTIVE FACTORS ON GROWING OF DEMAND FOR MILK AND MILK PRODUCTS IN DEVELOPING COUNTRIES

- rising incomes
- population growth
- urbanization
- changes in diets.
- This trend is pronounced in East and Southeast Asia, particularly in highly populated countries such as China, Indonesia and Viet Nam.

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- The background is a solid blue gradient. In the corners, there are decorative white line art elements resembling circuit boards or neural networks, with lines and small circles connecting them.
- By volume, liquid milk is the most consumed dairy product throughout the developing world.
 - Traditionally, demand is for liquid milk in urban centers and fermented milk in rural areas,
 - Processed products are becoming increasingly important in many countries.

PER CAPITA MILK SUPPLY IS:

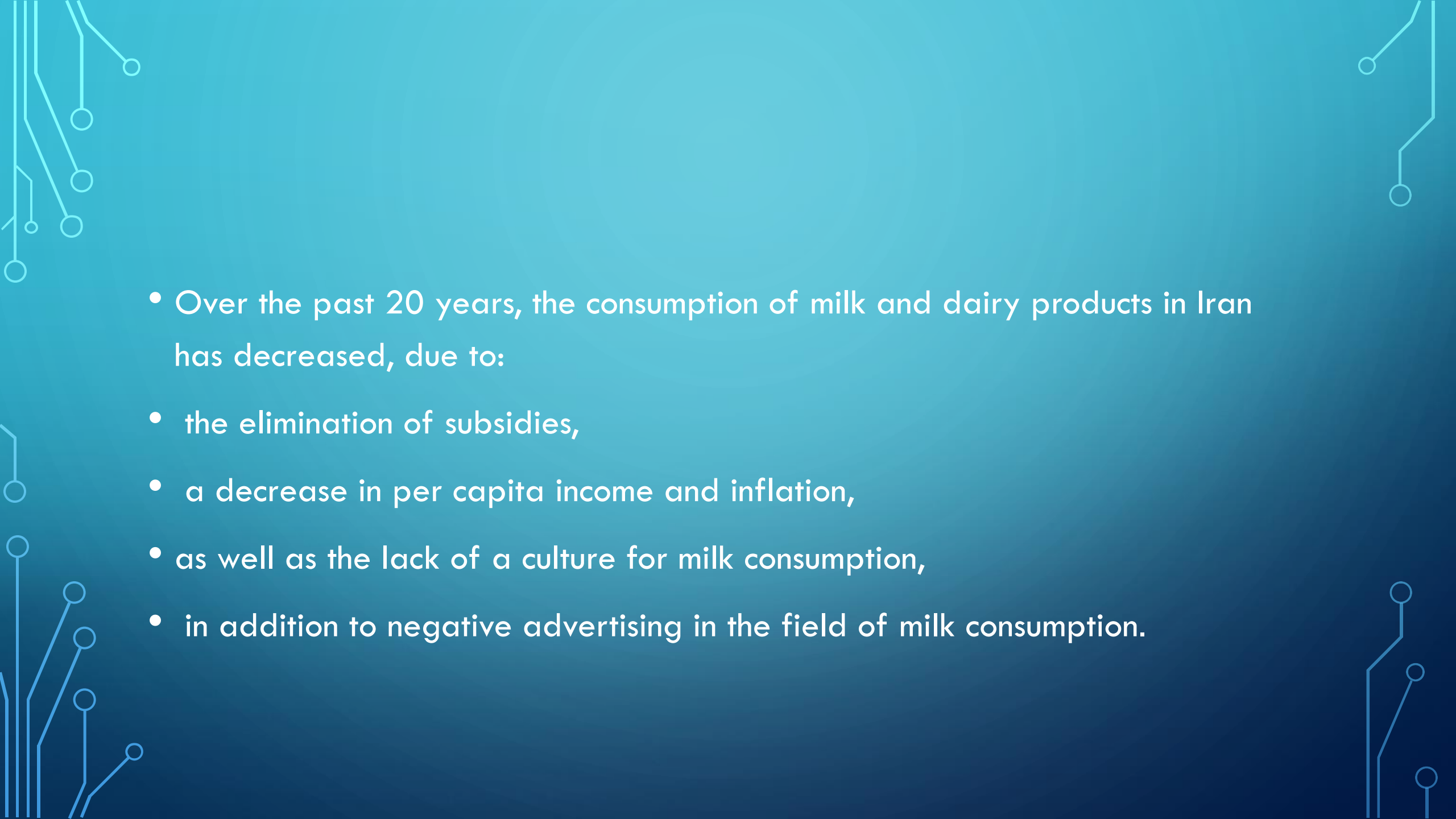
- high (> 150 kg/capita/year) in Argentina, Armenia, Australia, Costa Rica, Europe, Israel, Kyrgyzstan, Mongolia and North America;
- medium (30 to 150 kg/capita/year) in India, Japan, Kenya, Mexico, New Zealand, Pakistan, North and Southern Africa, most of the Near East and most of Latin America and the Caribbean;
- low (< 30 kg/capita/year) in Islamic Republic of Iran, Senegal, Thailand, most of Central Africa and most of East and Southeast Asia.

MILK PROVIDES:

- 3 to 4 percent of dietary energy supply in Africa and Asia, compared with 11 to 18 percent in Europe and Oceania;
- 5 to 8 percent of dietary protein supply in Africa and Asia, compared with 20 percent in Europe;
- and 6 to 9 percent of dietary fat supply in Africa and Asia, compared with 12 to 16 percent in Europe, Oceania and the Americas.

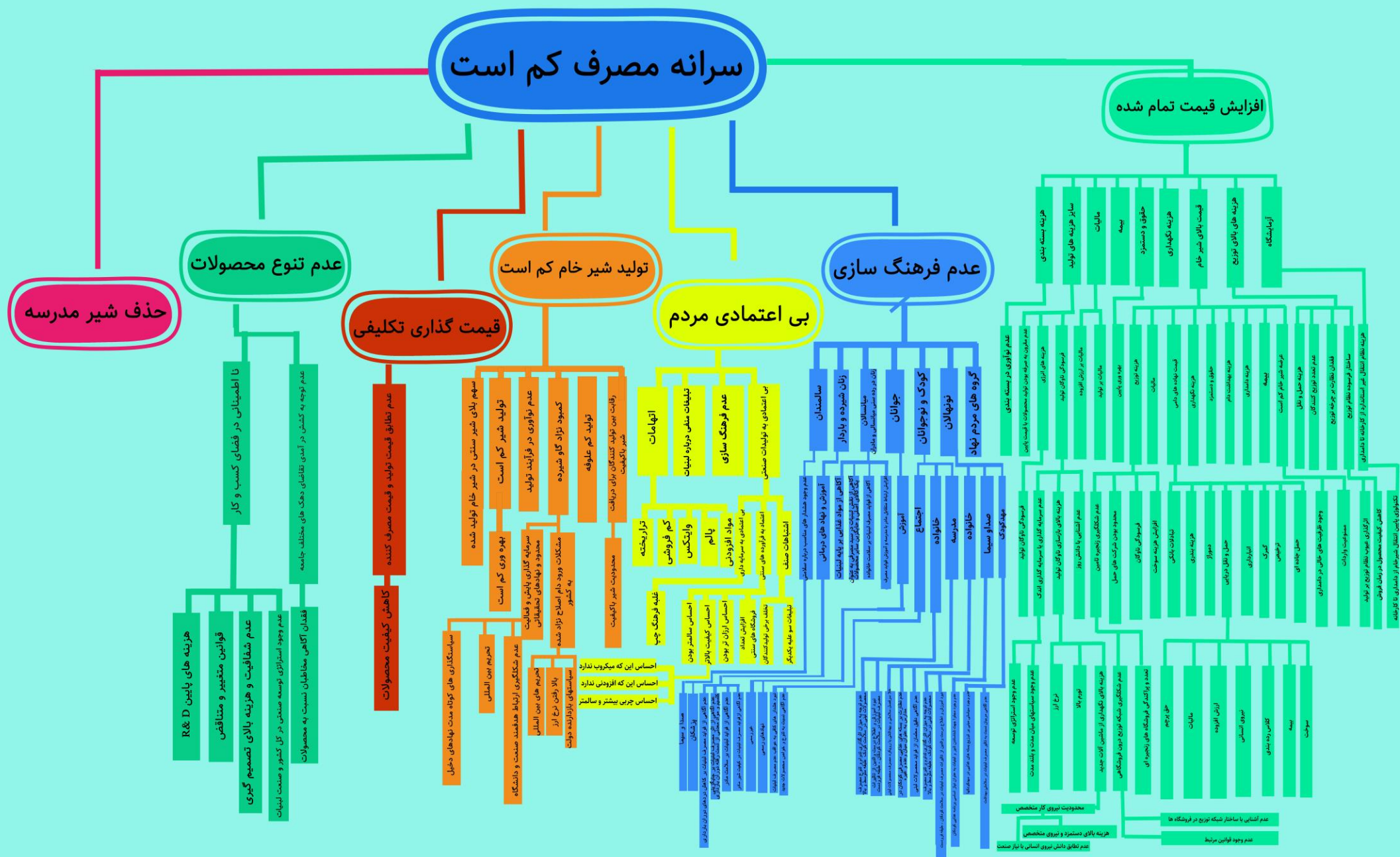
REGION	Macro nutrient		Energy
	Protein	Fat	
Africa & Asia	5-8	6-9	3-4
Europe and Oceania	20	12-16	8-11
Iran	11	13	6

- per capita consumption increased significantly in a few but highly populated countries, among them China, Indonesia and Viet Nam.
- Based on milk equivalent (ME), **average per capita global milk consumption** amounts to about **100 kg of milk/year**, with very significant differences between countries/regions.
- **Per capita consumption in Western Europe** is in **excess of 300 kg of milk/ year** compared with **less than 30 kg (and even sometimes as little as 10 kg) in some African and Asian countries.**

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- The background is a solid blue gradient. In the corners, there are decorative white line art elements resembling circuit boards or neural networks, with lines and small circles connecting them.
- Over the past 20 years, the consumption of milk and dairy products in Iran has decreased, due to:
 - the elimination of subsidies,
 - a decrease in per capita income and inflation,
 - as well as the lack of a culture for milk consumption,
 - in addition to negative advertising in the field of milk consumption.

میزان سرانه مواد غذایی مصرفی خانوار به صورت ناخالص و خالص سرانه گرم در روز (سال 1397-98)

شهری	روستایی	حاشیه شهر	کل	ماده غذایی
148/81	136/73	161/57	145/62	لبنیات
40/81	27/05	32/42	36/59	شیر
48/08	47/25	43/04	47/71	ماست
15/67	13/55	15/94	15/06	پنیر
38/27	43/67	64/02	40/51	دوغ
3/80	2/32	4/37	3/38	بستنی

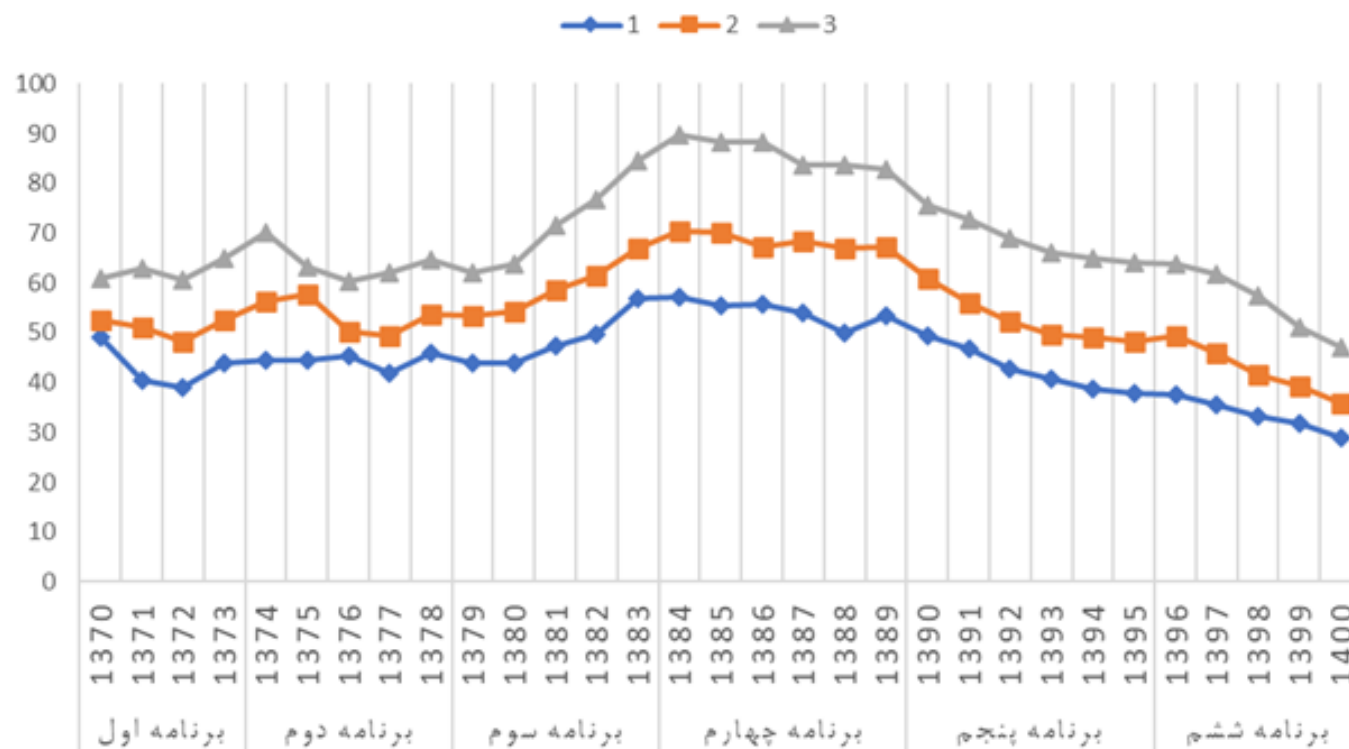


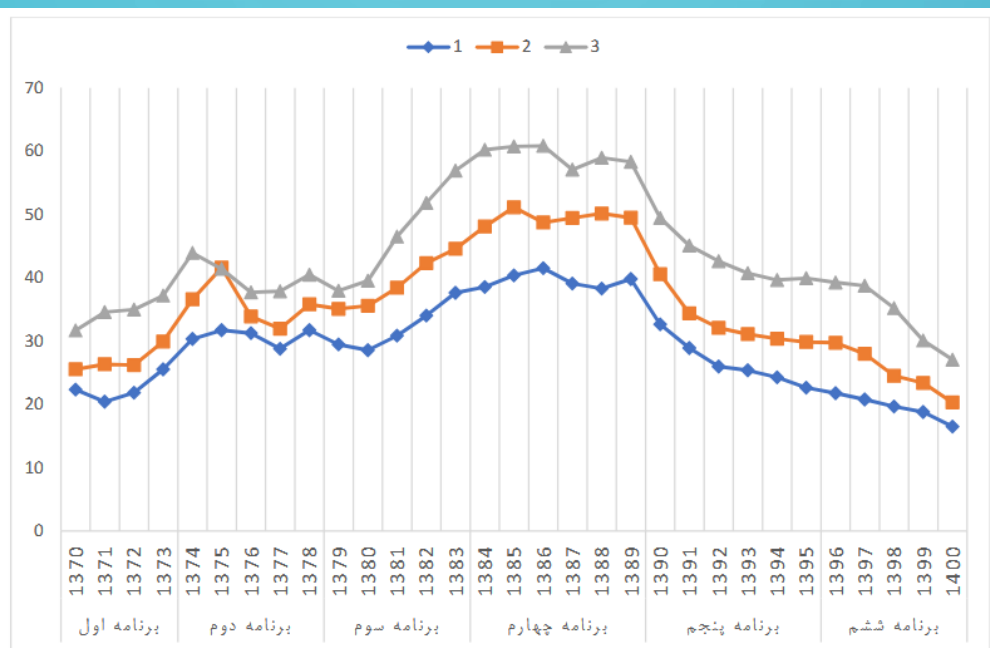
سهم درصد محصولات در سبد مصرف ایران

درصد (1393)(1403)	نام محصول
(34.35)(38)	شیر
(24.57)(23)	دوغ
(21.7)(26)	ماست
(11.86)(11)	پنیر
(3.43)(0.8)	خامه
(2.04)(1.5)	کره
(2.04)(0.2)	کشک

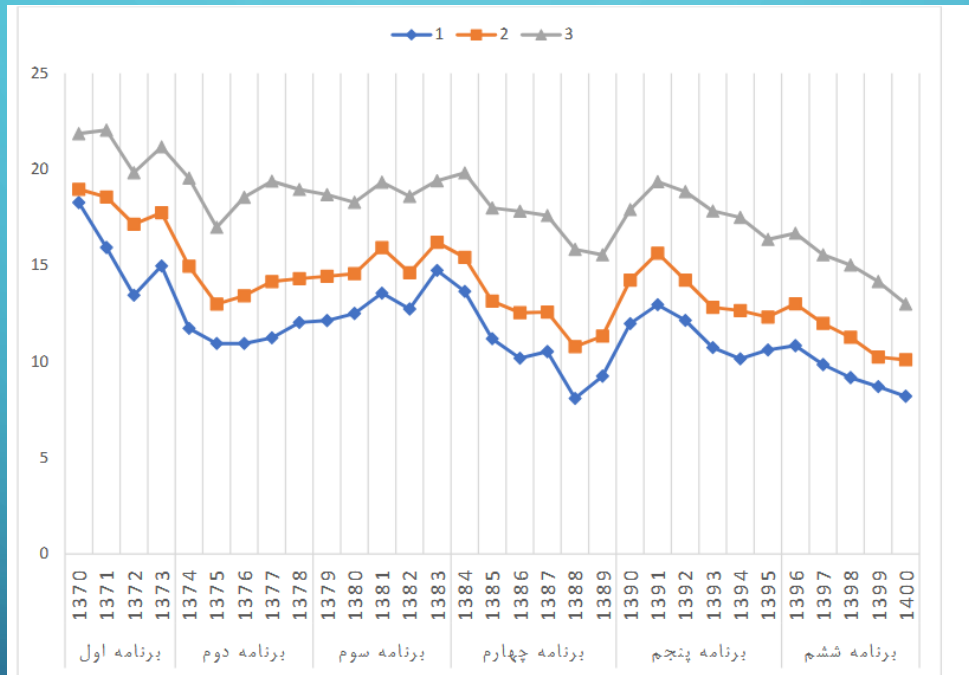
کشور	سرانه مصرف شیر نوشیدنی (kg/نفر/سال)	سرانه مصرف پنیر (kg/نفر/سال)	سرانه مصرف ماست (kg/نفر/سال)	سرانه مصرف کره (kg/نفر/سال)	محصول برجسته ۲۰۲۴	نکته روندی کوتاه
اتحادیه اروپا (میانگین)	55	21	12	4.1	پنیر	ثبات در پنیر و کاهش کره
آلمان	46	24	18	5	پنیر	کاهش شیر نوشیدنی، ثبات پنیر
فرانسه	50	26	15	4.5	پنیر	پنیر محور اصلی مصرف لبنی
ایتالیا	45	23	13	4	پنیر	پنیر رشد صادراتی بالا
اسپانیا	42	14	14	3.5	پنیر و ماست	افزایش مصرف ماست و پنیر محلی
هلند	48	22	12	4	پنیر	پنیر با صادرات بالا و رشد پایدار
لهستان	60	18	17	3.8	پنیر و شیر	رشد تدریجی مصرف لبنیات
سوئد	70	20	19	4.5	ماست و شیر	تمرکز بر محصولات پروتئینی سالم
سوئیس	60	25	14	5	پنیر	پنیر و لبنیات سنتی پایدار
انگلستان	55	18	13	3.5	پنیر	مصرف پنیر قوی، شیر نزولی
آمریکا	58	18.4	7	2.5	پنیر	پنیر رکوردشکن، شیر مایع نزولی
ترکیه	39	19.6	29	2.15	ماست و آیران	رشد تولید داخلی و مصرف آیران/ماست

روند میانگین وزنی سرانه مصرف لبنیات (کیلوگرم/سال) در سهک های هزینه خانوار



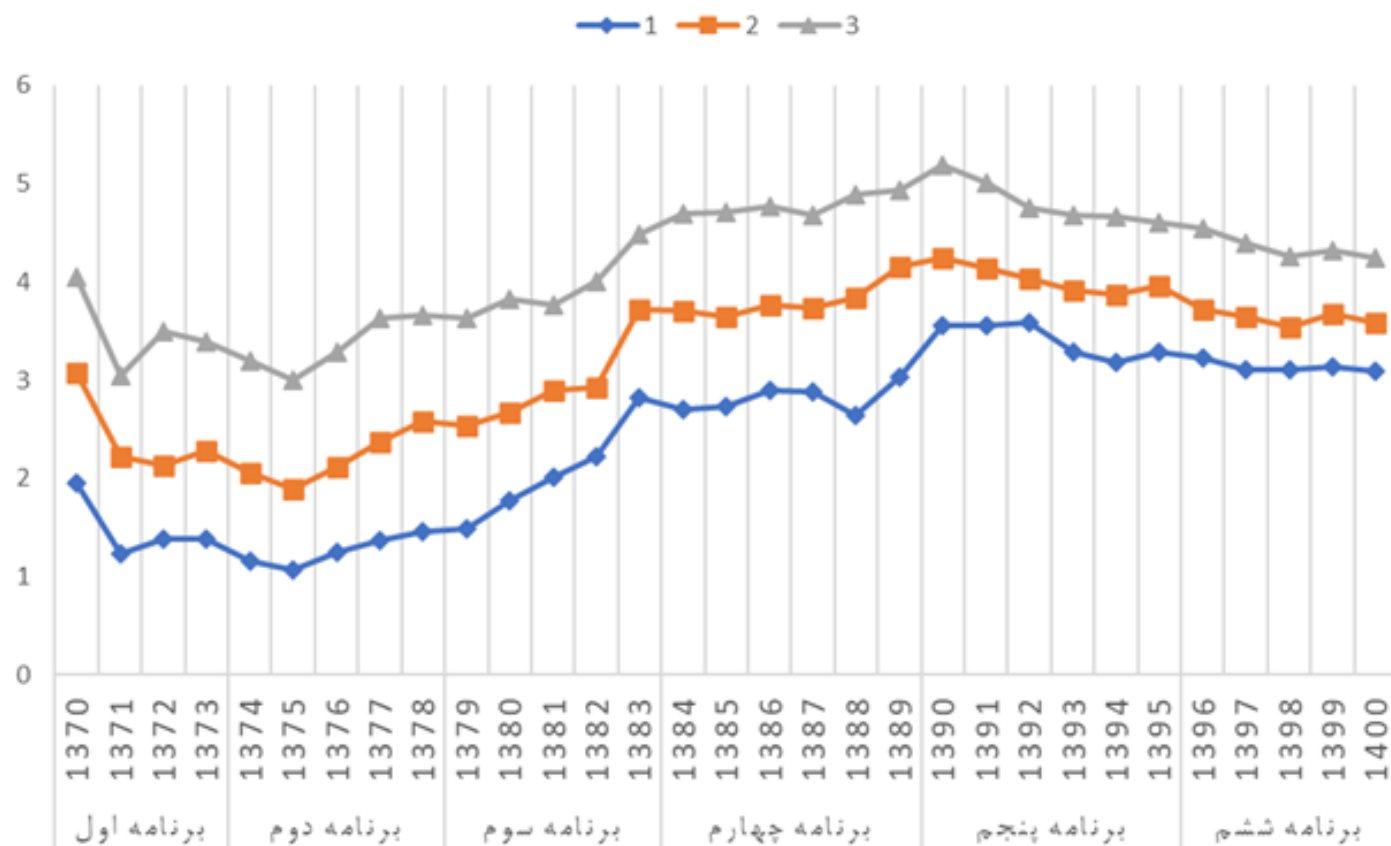


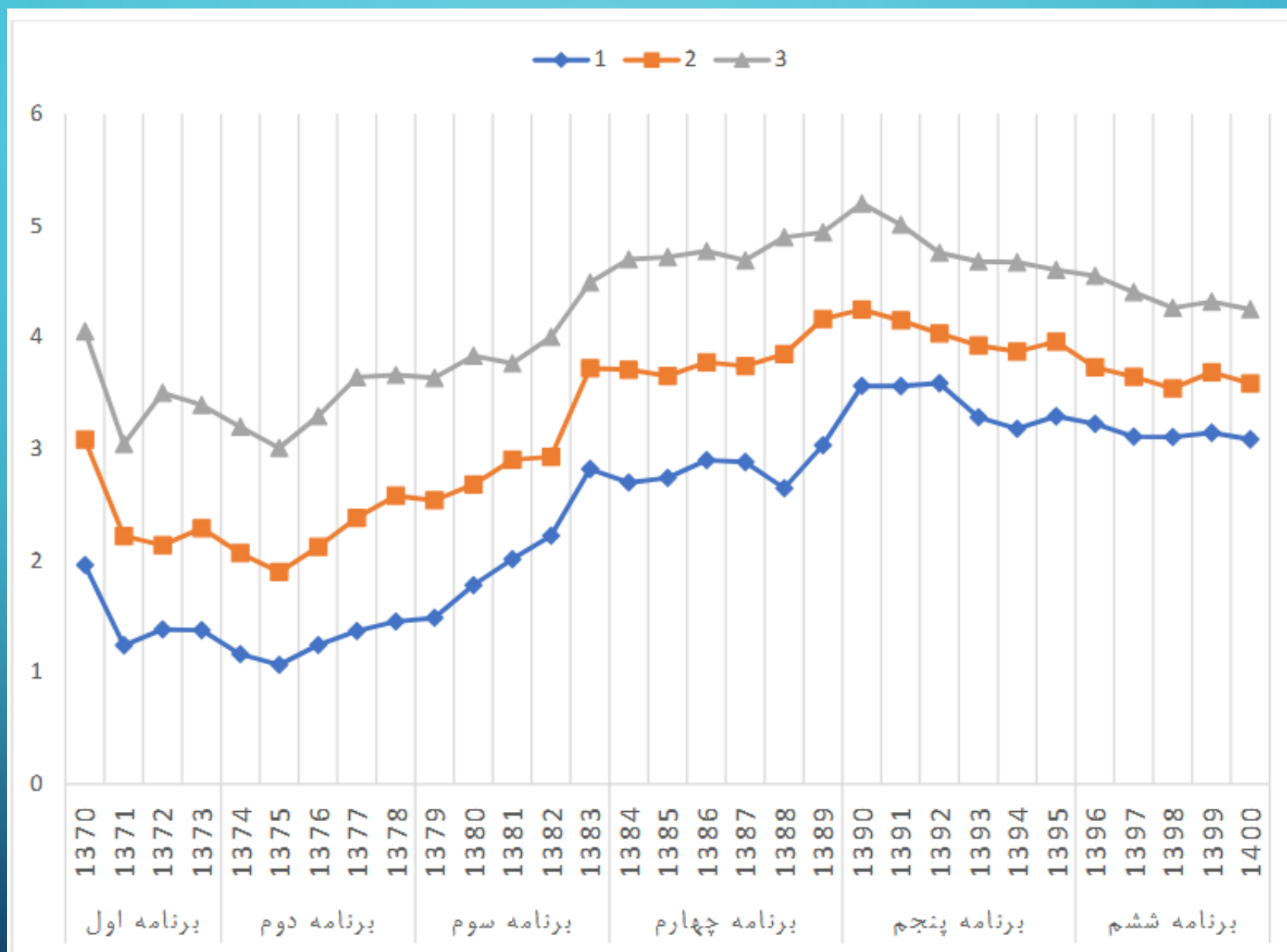
نمودار ۴-۱۲ روند میانگین وزنی مصرف سرانه شیر (کیلوگرم در سال) در سهک های هزینه خانوار طی سال های ۱۳۷۰-۱۴۰۰



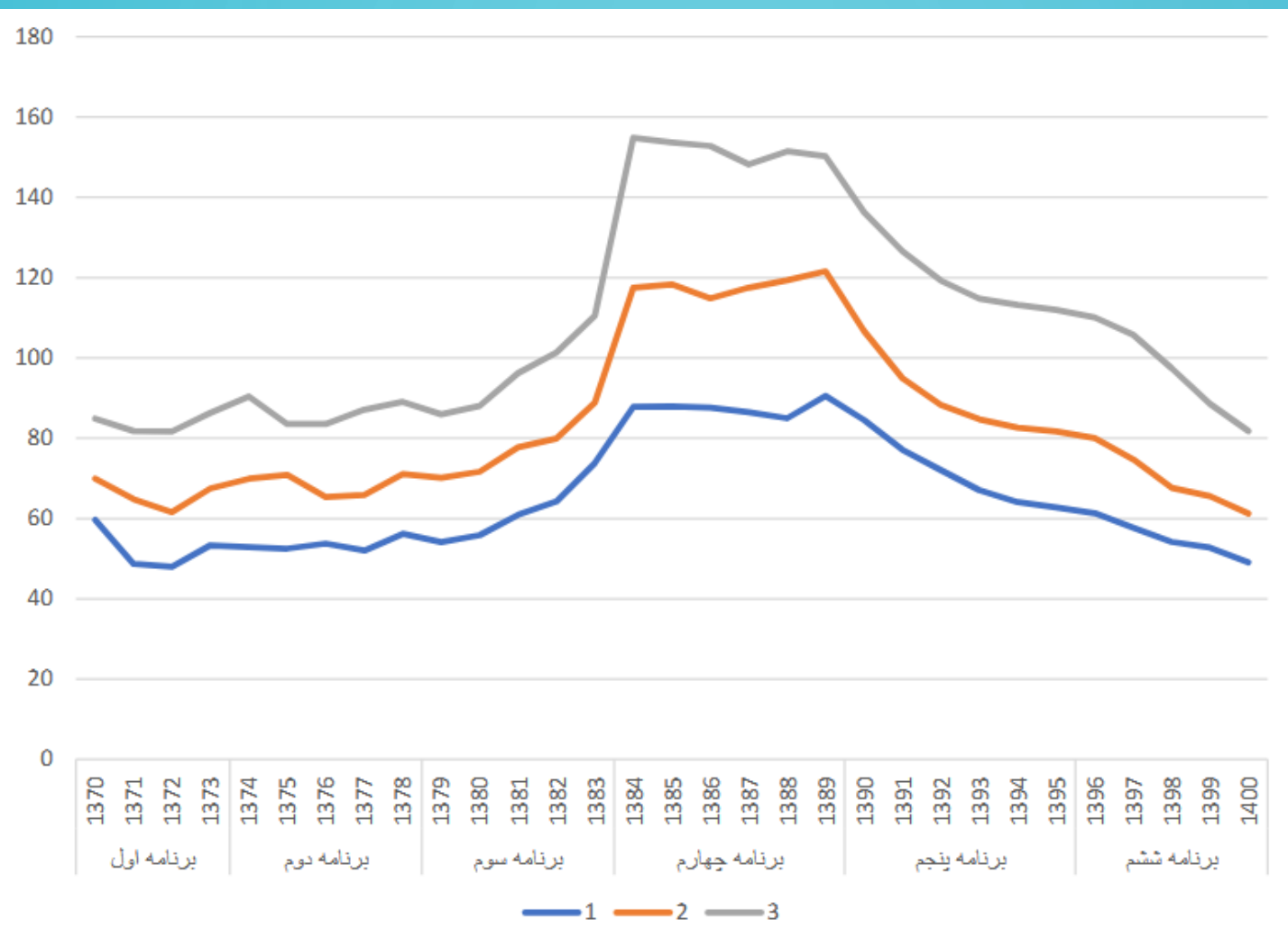
نمودار ۴-۱۳ روند میانگین وزنی مصرف سرانه ماست در سهکهای هزینه خانوار طی سالهای ۱۳۷۰-۱۴۰۰

روند میانگین وزنی سرانه مصرف پنیر (کیلوگرم/سال) در سهک های هزینه خانوار





نمودار ۴-۱۴ روند میانگین وزنی مصرف سرانه پنیر در سهک‌های هزینه خانوار طی سال‌های ۱۳۷۰-۱۴۰۰



نمودار ۴-۱۵ روند مصرف کل لبنیات (به استثنای خامه، کره و بستنی) بر اساس معادل شیر طی سال‌های ۱۳۷۰-۱۴۰۰

$x \cdot \vartheta / \delta \zeta$ Εὐαγγελίου καὶ ἰσχυρὰ Ἀντίστασις ὑπὸ ἡγετῆρος Ι., ± ὁμοίᾳ ἑνὶ ὄφιν-7 ' $\vartheta \alpha$
Εἰς < ἰνὲς ἡμῶν καὶ ἡμῶν >

Εἰνὴν καὶ ἑνὶ ὄφιν ± (' w ὑποψύχῃ)	Εὐαγγ. καὶ ὄφιν ± (' w ὑποψύχῃ)	ἑνὶ ἡμῶν * (' w ὑποψύχῃ)	ἑνὶ ὄφιν * (' w ὑποψύχῃ)	
64.61	63/00	104/55	107/80	1385
64.74	60.77	105/94	113/07	1386
61.65	59/50	90/04	97/18	1387
59.46	58.72	90/50	98/41	1388
58.89	59.98	93/85	100/29	1389
56.96	52.57	90/34	102/26	1390
57.90	46.65	96/12	104/57	1391
53.05	44.27	96/5	107/46	1392
50.41	42.30	96/5	113/03	1393
47.05	42.07	101/45	116/03	1394
44.92	41.87			1395
45.91	42/88			1396

Εἰνὴν καὶ ὑπὸ ἡγετῆρος (ὑποψύχῃ)	Εὐαγγ. ὑπὸ ἡγετῆρος (ὑποψύχῃ)	' ὄφιν ὑπὸ ἡγετῆρος (ὑποψύχῃ)	
134	142	139	ὑπὸ ἡγετῆρος Εὐαγγ. ὄφιν (1380)
		250	$x \cdot \vartheta / \delta \zeta$ (1390)

(Ἀντίστασις), ἡμῶν ἡμῶν
< ἰνὲς ὄφιν ὄφιν, ἡμῶν ἡμῶν >

