

## CENTRAL EUROPE WITHIN DAIRY EUROPE

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### Abstract

Central Europe accounts for about 20% of continental milk production. Built on a certain tradition, mainly in the Carpathians, production was particularly developed during the communist period on large collective farms associated with industrial dairies. After 1989, this system was greatly transformed, leading to the near total reorganisation of channels (production and processing). Twenty-five years later, the analysis shows significant regional differences between zones that adapted to the new context and became dynamic dairy territories (ex-GDR, Poland, the Baltic states), and others which did not adapt as they lacked organisation and competitiveness (Romania, Bulgaria, Balkan states outside the EU).

**Key words:** Central Europe, Poland, Carpathians, milk production, dairy channels.

### INTRODUCTION

Almost everywhere in Central Europe, from Estonia to Albania, milk follows a channel which shows both important similarities and discrepancies with the western part of the continent. This paper aims to improve knowledge of the dairy sector in post-communist Europe, one of the major productive sectors of the region. It will address the sector both upstream and downstream, that is to say, milk production structures (i.e. raw material) and milk processing units. This analysis attributes an important place to the dynamic land at work in this vast geographical area.

The geographical scope of the study is that of Central Europe. It concerns the territories of the former socialist Europe, marked by the legacy of collectivisation of the means of production (upstream and downstream). It includes the Baltic states (which directly depended upon the USSR), the ex-GDR, the former Yugoslavia and Albania. However, the current configuration of this dairy Central Europe

leads to a focus on analysing countries within the European Union only, such as those organised by the CAP since 2004 (or 2007, or 2013). It focuses particularly on Poland, the Czech Republic, Slovakia, Hungary and Lithuania; five countries where the bulk of the production of this vast region is concentrated (Figure 2). The ex-GDR is addressed in part as it has increasingly detached itself from post-socialist Europe (German reunification now goes back 25 years) to integrate a reunited Germany (the role of processing enterprises in particular). States situated south of this set (former Yugoslavia, Albania and Bulgaria) are only marginally addressed, given the weakness of their milk production.

We shall analyse this dairy channel from three viewpoints: history, geography and economics; an approach that requires classic bibliographical work, fieldwork and cartographic analyses. The geographic scope of the former communist countries is essential, together with the weight of their legacy, while keeping in mind that the past is more and more distant.

Methodologically, the paper draws on milk production and collection statistics (Eurostat, CNIEL). Since 2004, strict regulation of quotas makes this statistical material reliable, at least in the EU countries and as far as collection is concerned. Conversely, the statistical data of the communist era were of a far more uncertain quality. Nowadays, the quality of data relating to the Balkans remains very uncertain for various reasons (weight of processed products on the farm, weak control of collection companies, weaknesses of the administration). The literature review has focused on French language documents, although some reports in English or other languages were used. However, the purely geographical literature of interest here is quite limited, generally speaking. This research attaches great importance to companies' transformations. To gain knowledge of these changes requires reading the trade press, exploiting websites and conducting field surveys. These were mostly carried out in the Carpathians, on dairy farms and dairies. The main limitations faced by this research stem from the size of the study area (fifteen countries), the great diversity of regional situations and the very rapid development of the processing industry (numerous capitalistic reconstructions).

## LONG-TERM DYNAMICS

French geographers who studied these territories in the interwar period, such as de Martonne (1930, 1931), Deffontaines (1927) and Ancel (1937), spoke little of dairy production. Breeding appeared very common then, but mostly for home consumption. Although cattle were significant, sheep undoubtedly constituted most original herds. As shown in the 1935 *Atlas of Czechoslovakia* (Láska et al. 1935), cows prevailed in Bohemia and Moravia, but were scarce in Slovakia and Ruthenia, where ewes (milk), in contrast, were very numerous. Sheep breeding spread throughout the Carpathians (Kubijovych 1932; Heteš 1951) thanks to Vlach shepherds conveying, as far as Moravia, real cheese-making know-how, and that allowed the individualisation of several specific cheeses, including the Slovak *bryndza*<sup>1</sup> (Lompech

and Spišiak 2003; Lompech and Ricard 2007). At the end of the 18th century this sparked the creation of an entire network of specialised *bryndzáreň* all the way to the markets of the United States. The same expertise is behind other specific types of cheese: *oštiepok*, *parenica* and *korbáčiky*. This know-how is also found in the Romanian Carpathians where, incidentally, the term *brânză* means cheese. For example, it allows for the production of the *brânză de burduf*, which is packed in pine bark, and of the *kashkaval*, a semi-hard sheep cheese still being widely developed today. In Bosnia, types of cheese similar to the Slovak *bryndza* or Greek feta were developed, some of them refined in skin pouches. All these cheeses are linked to places, they are products of 'terroir' and undeniably products of the mountains, such a tradition being virtually unknown in the plains.

From 1945/1948, the transition to a socialist economy reorganised production and dairy processing, both sectors were included in the process of socialist modernisation. This led to the creation of new cooperatives or state farms, covering large areas, and breaking away from the original peasant system. These structures developed dairy cattle rearing, deemed more likely to meet the plan's objectives than rearing dairy sheep, which were harder to intensify. Downstream, private dairies (Slovak *bryndzáreň*) were collectivised; new industrial dairies were founded by the State, from 1970 in particular, as collectivisation increased. A new agro-industrial model proved necessary, based on the search for volume as well as ordinary and standard products unrelated to tradition: yogurts, milk for drinking, generic cheeses, powders, etc. The peasant economy gave way to agri-food chains.

However, the socialist model was not uniformly imposed. The spread of collectivisation was slower in the Carpathians where it only reached some Slovak villages after 1980 and some territories (more or less) avoided the process, especially in Poland (more precisely old Polish lands in southern and central parts of the country), and in the Carpathians and the Balkans where sheep breeding proved difficult to fit into the socialist economy. As such, in Orava and the Tatras, cooperatives specialising

<sup>1</sup> The *bryndza* is also produced on the Polish side, especially in the Podhale. It is a 'cheese ingredient', used for cooking or spread on bread slices, rather than a cheese as consumed in France.

in this type of breeding still sent shepherds to summer pastures where they made *hrudkový syr*<sup>2</sup> as they had before 1948.

## CONTEMPORARY REORGANISATION OF SECTORS

Following the Revolutions of 1989, this dairy world underwent the general de-collectivisation process that affected the overall economy of all countries. The process concerned upstream, downstream and far downstream sectors, i.e. dairies, processing industries and distribution networks. It varied significantly from one State to another, depending on their specific history (as on their prior degree of collectivisation) and on the political choices made from 1990 onwards: a 'pragmatic' de-collectivisation in Czechoslovakia, as coined by Zrinscak (1997), more systematic in Romania, chaotic in Albania, and associated with reunification in the ex-GDR. From that time dairy farms and dairies have followed uneven paths, with the mutations affecting the ownership of the land, the tools of production (the farm, its buildings, its equipment, its herds and flocks...) and the processing undertakings.

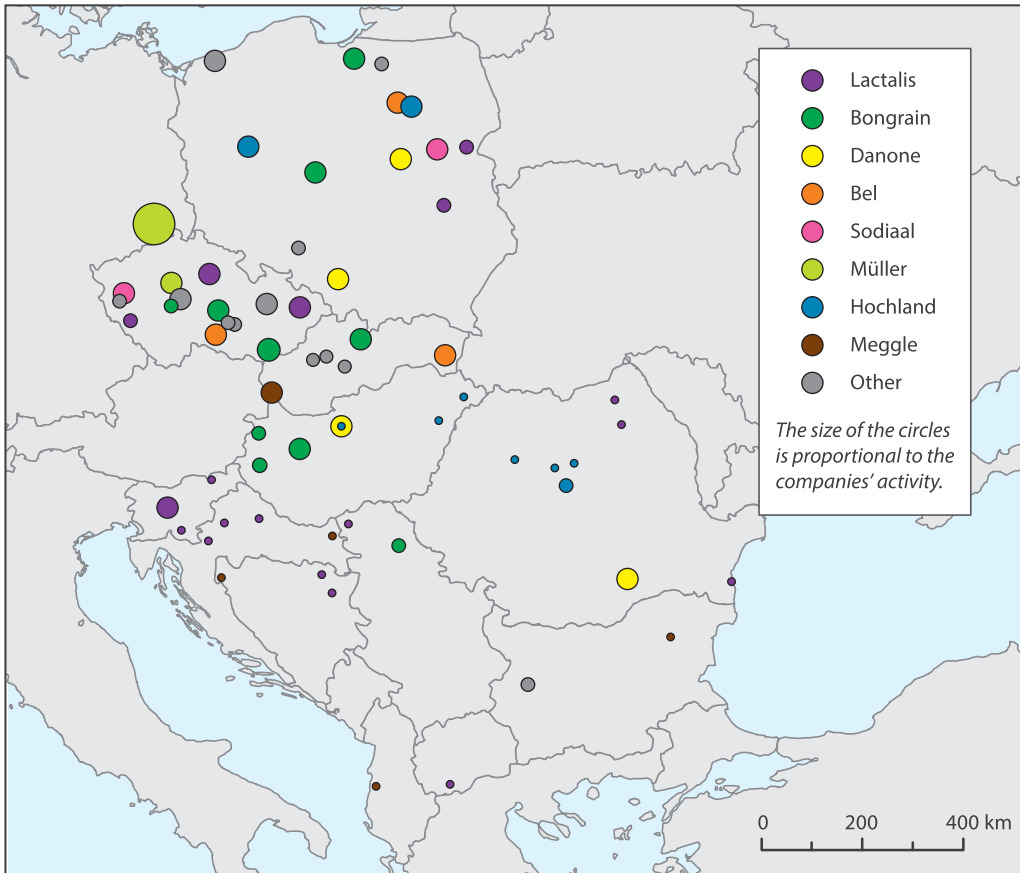
Upstream, the issue of land ownership does not apply much to our study after all, considering the mutations of operating structures and farms. In Romania, the widespread dismantling of former collective structures took place, and they were replaced by a few large farms and more particularly by a multitude of micro-farms, whose size (a rather limited number of livestock) related to that of landholdings (Von Hirschhausen 1997). On the other hand, de-collectivisation in the former Czechoslovakia was less brutal and largely preserved the operating structures. The former collective farms were then transformed into companies whose capital was distributed to cooperative members; the amount depending on their previous contributions in terms of labour, livestock, equipment and land. Shares in such cooperatives (*družstevné podielnicke listy*, or DPL, in Slovakia), generally transferable, were concentrated rather quickly in the hands of cooperative employees only, then especially in the hands of management

<sup>2</sup> *Hrudkový syr* is a kind of 'pre-cheese', which is then transformed into *bryndza*.

(director, zoo-technician, veterinarian, accountant etc.) (Lompech 2003). Twenty-five years after the Revolution, today's situation favours the re-sale of such companies: in the Danube Plain of Western Slovakia it is no secret that Bratislavian and non-agricultural investors re-purchase DPL, hence farm. They do not have to buy the land, which continues to be (merely) leased to multiple owners. Meanwhile, as early as 1990, other farmers had started individual and family farming, taking over land (by purchase or hire) and investing in a dairy herd. However, the movement faced limitations in some countries, given the difficulties in taking over land when controlled by cooperatives and the high level of investment needed in dairy production (livestock, buildings, mechanical milking equipment). This movement is mostly obvious where individual farming is preserved (central, southern and eastern Poland in particular), but there are also many examples in Hungary and the Czech Republic. As for (dairy) State farms, they are privatised in most cases. This de-collectivisation process has been analysed by several authors, such as Maurel (1995) in France and Myant and Smith (2006) in the Czech Republic.

Downstream, the process of de-collectivisation also reshaped the dairy processing landscape. When still active, businesses that were looted post-war are returned, as in the case of the last remaining *bryndzáreň*. Other dairies, extensively built during the socialist period, were privatised, often as part of the 'large privatisation', as most of them were major industrial structures. In parallel, a creative movement developed, many individuals took advantage of the new entrepreneurial freedom to create artisanal dairies. However, the restructuring process quickly removed many of these units that were too small, outdated, poorly managed or unable to find their place in the market. This creation/restructuring dynamic was observed in most countries, especially in the 1990s.

The processing sector was also heavily impacted by incoming foreign companies, which arrived as early as 1992/1993 and established a strong presence between 1995 and 2005 (Dries 2004; Šimůnek 2008; Ubrežiová 2005). They consisted in ten major West European groups, usually private, that favoured



**Figure 1** Foreign dairy industries in Central Europe. Source: own survey.

Poland, the former Czechoslovakia and Hungary, the best regions, to put it in a nutshell, and proceeded to upgrade the industrial tools (Korsgaard 2005). The most active were the French with Bongrain/Savenica (especially in Slovakia), the giant Lactalis (which moved in rather late everywhere, even in the most difficult areas such as Croatia and the Ukraine), Bel (melted cheese *La vache qui rit*), Senoble (which built a yogurt factory in Zvolen) and the Bavarian SMEs such as Meggle, Hochland, Müller and Erhmann (Ricard 2010), see Figure 1. Dutch and Austrian nationals were also present. Italians had made a huge breakthrough in Slovakia in 2000, before they withdrew almost as fast as unlike another Italian firm, the Orrero SME, that invested in Litovel, near Olomouc (parmesan type of cheese) and in a dozen creameries in the Czech Republic, engaging producers in environment-friendly practices.

Taking stock of this transition remains difficult. Upstream, production and collection often decreased (in the order of 50% between 1989 and 1993) as a result of multiple factors: economic crisis, declining consumption, cooperatives crisis, disruption of chains/channels, the calling into question of the intensive system, a return to some statistical truths. In general, collection did not return to its previous levels and has even continued to decrease over the past ten years, with the notable exception of the ex-GDR, Poland and the Baltic states. The first has undoubtedly benefited from the reunification of Germany, while the second has gradually expressed its potential. The situation is more alarming in Romania and Bulgaria, where collection has fallen by a third since 2000 and where the authorised quota is now very far from being produced (Table 1).

**Table 1** Milk quota and milk collection in Central Europe (2012/2013 season). Source: CNIEL.

Country	Delivery Quota (in tons)	Collection (in tons)	Collection/Quota (%)	Farm Producers' Quota (in tons)
Poland	9,808,000	9,921,000	101.1	148,000
Czech Republic	2,884,000	2,377,000	82.4	22,000
Hungary	1,947,000	1,351,000	69.4	165,000
Lithuania	1,735,000	1,339,000	77.2	75,000
Romania	1,522,000	879,000	57.8	73,000
Slovakia	1,067,000	827,000	77.5	38,000
Bulgaria	969,000	495,000	51.1	70,000
Latvia	754,000	736,000	97.6	19,000
Estonia	679,000	706,000	104.0	7,000

The record is mixed downstream too. Restructuring has been intense, linked with the general decline in activity and the presence of multiple non-competitive units, and it has accelerated since 2004. The arrival of foreign investors has also led to a loss of control of the industrial tool and now the future of the industry is largely decided in Bavaria and Paris. In Slovakia, foreign investors seem to control 70% of the collection sector (Carlier 2001), leaving little room for a restored business (Manica in Tisovec). Some cooperatives invested downstream (Červený Kameň, Leštiny, Kluknava, Veľká Franková) and three (Kežmarok, Hummenné and Lipany SMEs) did not, the latter relying on its own network of stores *Agromilk* (personal inquiries). In Romania, Friesland Campina (Netherlands), Danone (France) Hochland (Germany) and Dorna (Switzerland) largely dominate the Covalact, Prodlacta and Raraul local groups.

However, an industry with national capital has maintained itself, with the two large Polish cooperatives, Mlekpól and Mlekovita, each processing a billion litres of milk per year and being among the major European dairy cooperatives (Sznajder et al. 2005). In the Czech Republic, Madeta in České Budějovice, issued from the old regional monopoly, processes 500 million litres per year and Olma (a private firm in Olomouc) 200 million, that is to say 25% of the national collection between them (Ubi-france 2008).

Studying supermarkets and hypermarkets sections also provides valuable information. The whole range of local products is displayed side by side (milk, cream, cheese, butter) and many products imported from the West, supported by leading brands (*Activia, President, Yoplait*). The most dynamic and best-organised dairy countries retain large market shares, such as Poland and the former Czechoslovakia, while foreign brands are more present further south. Note that in the Balkans, Romania and Bulgaria, a significant proportion of sales are made on the markets or on road-sides.

#### DAIRY CENTRAL EUROPE FACING NEW CHALLENGES

Around 1995, Western breeders, with the French in the lead, feared the new competition. Huge farms, cheap labour, competitive milk prices: Central Europe had everything to win and protective measures were demanded. Pouliquen (1991, 1993, 1997, 2001) stressed the structural weaknesses of these channels: a difficult transition, unresolved ownership issues, farms lacking money, unmotivated employees, limited technical performances and low productivity. Added to this, in the case of milk, there were difficulties/issues with health standards, especially on the Romanian and Polish micro-farms, but also in many large farms. In short, beyond the size of the fields, buildings and livestock, Central Europe suffered from real structural handicaps.

**Table 2** Average yield of dairy cows in 2012 (kg/year). Source: CNIEL.

Country	Yield (kg/year)	Country	Yield (kg/year)
ex-GDR	8,510	Denmark	8,647
Czech Republic	7,524	Sweden	8,230
Estonia	7,492	Finland	8,158
Hungary	7,251	Spain	8,150
Slovakia	6,225	Netherlands	7,900
Slovenia	5,693	United Kingdom	7,698
Latvia	5,305	France	6,742
Poland	5,179	Italy	6,510
Lithuania	5,077		
Bulgaria	3,490		
Romania	3,317	EU average	6,626

Such handicaps were gradually revealed over the recent period and French producers have been proven wrong: Central Europe was not forced upon the European dairy map and, once the last transition was completed (about 1993), the Central European countries did not recover well (Pfimlin 2010).

Back to the present: the 2003 reform of the EU dairy policy and the end of quotas on 31 March 2015 led to a new context marked by the absence of government intervention and a greater share granted to the market. Therefore, it would be expected that the logics of competitiveness fully function between producers, companies, territories and States. Either Central Europe has strong assets and can consider volume growth, and some development, or it can go round such direct competition by playing on differentiation, quality, and territorial resources. Finally, Central Europe does not have sufficient assets, in which case it will inexorably decline. All this leads us to several conclusions.

First of all, some weakness appears in the differentiation-based approaches. Certainly, there are many local products, with some real success stories here and there (*korbáčiky* of Zázrivá in Slovakia, *olomoucké tvarůžky* in Moravia), but only 8 dairy

PDO<sup>3</sup> (**Protected Designation of Origin**) and 13 PGI (**Protected Geographical Indication**) were granted by the end of 2014. Moreover, these regional products are often consumed locally and draw little interest from the large groups, not to mention that hypermarkets do nothing to promote raw milk cheeses.

It can also be considered that the future lies in farm production and products being sold on markets. Such “short circuits” exist, especially around major cities in the northern half of Central Europe. Elsewhere, peasant production remains uncompetitive, fragile in terms of health and in the hands of ageing and ill-equipped producers: in short, it is not forward-looking.

The development of dairy Central Europe mainly depends on its ability to find its place in conventional agro-industries, and this requires high efficiency both upstream and downstream (NAFC 1999). Therefore, a general trend is difficult to identify across this vast territory which is impacted by the sum of individual trajectories, as well as different national and regional situations.

<sup>3</sup> 47 in France and Italy, 26 in Spain.

A dairy farm's ability to produce quality milk at competitive prices is essential and, at first glance, the region seems well-positioned as it produces the cheapest milk in the Union: in 2013, prices ranged from 306 EUR/1,000 litres in Romania to 350 EUR/1,000 litres in Bulgaria, compared to 350–400 EUR/1,000 litres in large western dairy countries (Eurostat); but the statistics are misleading. The price difference is not huge (about 15%) and Central European farms are in as much trouble as their Western counterparts, despite significantly lower production costs (labour, standards, taxation). There are also weaknesses in labour and animal productivity. Indeed, except for the ex-GDR, the Czech Republic and Estonia, the average yield per cow in particular – a key indicator – truly lags behind western dairy countries (see Table 2).

There is also a great diversity of production structures, with large farms from former cooperatives, modernised individual farmers, and peasants with poor facilities, as well as micro-farms in Romania and the Balkans. The situation is improving, but at the cost of intense restructuring. In just a few years, from 2008 to 2013, the number of farms with a delivery quota decreased from 206,000 to 142,000 in Poland, 226,000 to 90,000 in Romania and 87,000 to 10,000 in Bulgaria (CNIEL). The selection of dairy farms and territories benefits the Northern Plains that combine an oceanic climate favourable to grassland, the presence of large farms and modernised individual farmers, as well as early support from the State and Europe (ex-GDR), and are also efficiently supervised by the dairies.

Downstream, plants still lack efficiency and are often too small, with the notable exception of the ex-GDR. For example in Slovakia, large units rarely process more than 100 million litres per year, whereas West European plants often reach 300 to 500 million, with some instances of enormous production (over one billion litres). In short, Slovakia would only need 3 or 4 plants were it close to the Channel. However, the country's industrial tool has been much modernised, especially under the influence of foreign investors, and it has benefited from competitive labour costs. The context is therefore

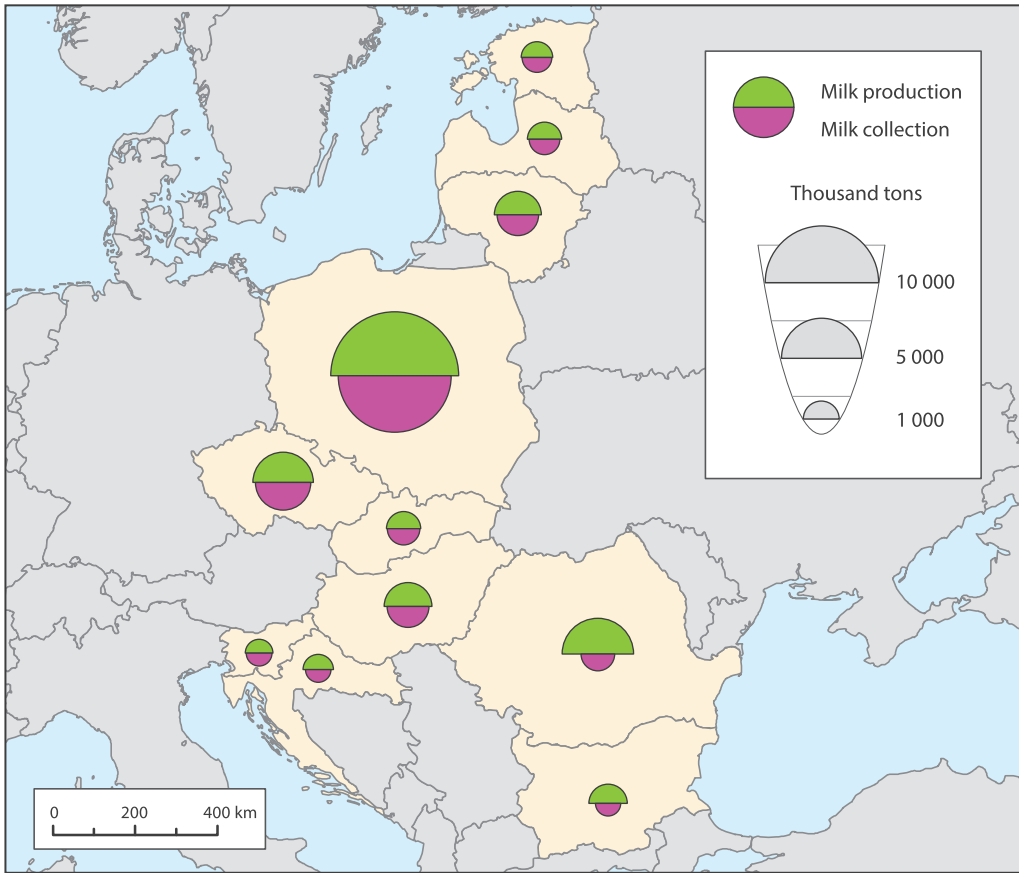
one of relative global industrial efficiency, with a gradient decreasing from the ex-GDR to the Balkans. A telling point is the absence of a manufacturing relocation process to Central European plants: products from the leading brands such as *Activia*, *President* and *Leerdammer* are still manufactured in the West where the industrial tool is competitive and the upstream + downstream structure effective.

## REGIONALISATION OF THE CENTRAL EUROPEAN DAIRY SECTOR

Central Europe did not become the great dynamic and highly-competitive dairy region the French dreaded. As it is, its share of European production decreased from 19.1% in 2007 (excluding the ex-GDR) to 18.0% in 2013, and from 14.0% to 13.6% in terms of collection. It produced 27.2 million tonnes of milk in 2013 (12.7 in Poland, 3.9 in Romania, 3.4 in Baltic states; see Figure 2), but subsistence farming and direct sales brought collection back to 18.6 million tonnes, including 9.9 in Poland, 2.8 in the Baltic states and 2.4 in the Czech Republic (Eurostat). However, these figures mask considerable regional differences (Figure 3), leading to the individualisation of four major dairy areas.

### Dynamic northern dairy territories of Central Europe

**The ex-GDR** is undoubtedly the most dynamic region. By integrating the EU as early as 1991, it greatly benefited from the CAP, and businesses across the country offered former collective farms a favourable and stable production framework: collection increased from 5.25 billion litres in 1992 to 6.3 billion litres in 2013. A powerful industrial tool was also developed, notably thanks to the large DMK cooperative and Müller, the Bavarian industrial which operates the largest plant on the continent in Leppersdorf (Dresden): it processes 1.7 billion litres per year. The ex-GDR is now part of the dynamic European dairy regions, even if faced with complex recruitment issues in terms of hired labour, and competition from the cereals sector.



**Figure 2** Milk production and collection in Central Europe in 2013. Source: Eurostat.

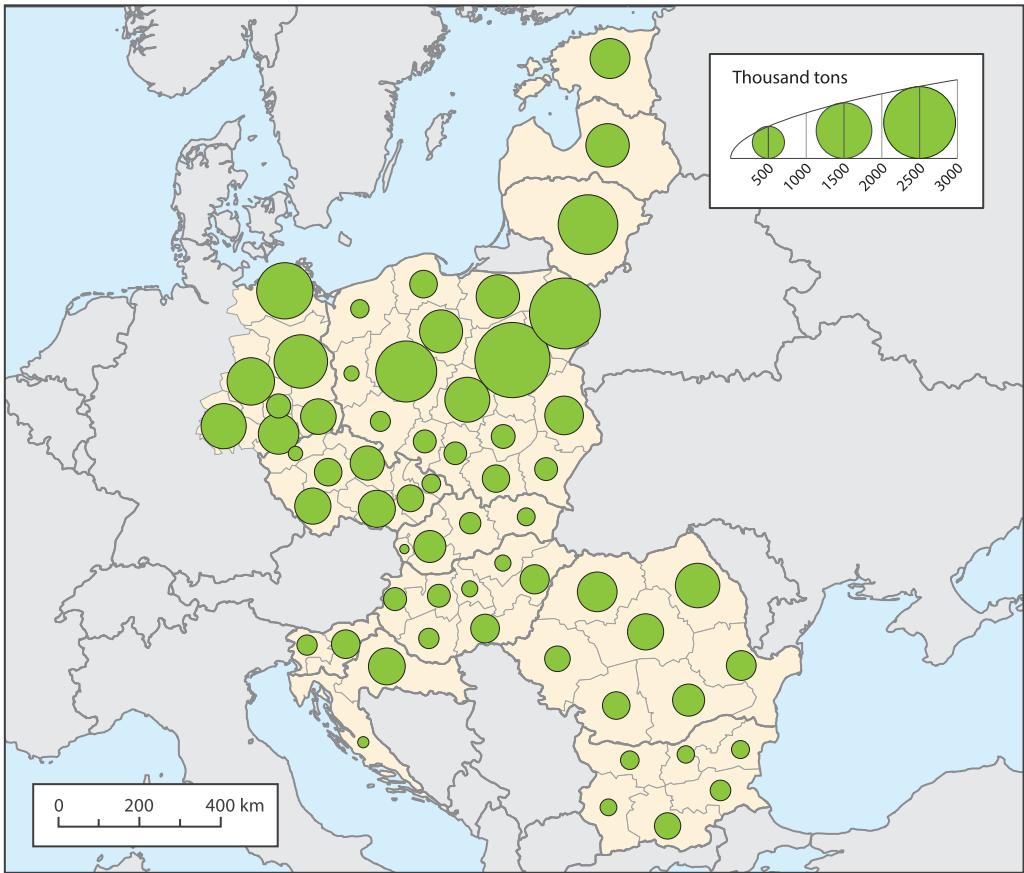
**Poland** is the other dynamic dairy land (Carlier 2000). The massive restructuring selected motivated producers and collection rose from 6,662,000 tonnes in 2000 to 7,829,000 in 2005, and to 9,921,000 tonnes in 2013, in other words, one of the strongest continental growths. The country now ranks fifth in Europe, ahead of Italy. The core of such dynamics is located in the northeast (Warmia, Masuria, Podlasie), a semi-pastureland which relies on a dense network of producers and the invigorating action of foreign dairies, as well as large cooperatives such as Mlepol and Mlekovita.

The same dynamics drives the **Baltic countries**, with lower volumes but spectacular growth. Indeed, from 2004 to 2013, collection increased by 17.6% in Lithuania, 31.7% in Estonia and 58.6%

in Latvia. During the inter-war period, these countries had adopted the Danish model, based on family farms, milk, intensification, cooperatives and exports to the West. Soon after 1991, the Baltic countries re-adopted this approach and dynamism, particularly Lithuania, the most efficient country (Macyulité 2001).

All these territories have grown stronger in dairy Europe. Upstream, large structures inherited from communism (ex-GDR) mix with often efficient family farms (Poland, Lithuania, Latvia). The cost of labour constitutes an asset and the technical level is progressing. Downstream, in the absence of a true cheese tradition, generic products are mainly delivered and those regions increasingly adopt structures similar to the agro-industrial sectors of northern Germany and Scandinavia.





**Figure 3** Milk production in Central Europe in 2013 (NUTS 2 level). Source: Eurostat.

### Other dynamic dairy territories

Central Europe is home to other dynamic dairy zones, but they are less effective than the Baltic shores, especially in the former Czechoslovakia and Hungary. Certainly, collection decreased ( $-7.4\%$  in the Czech Republic from 2004 to 2013,  $-11.7\%$  in Slovakia and  $-14.2\%$  in Hungary) and national quotas have not been met (Table 1), but farms have a good technical level, good health control (Slovakia) and processing tools are powerful enough (Keresteš and Selecký 2005). Several areas stand out, such as Šumava, Moravia, the Danube Plain of Slovakia near Bratislava (Hrnčiarová et al. 2002), some areas of the Carpathians (Orava, Liptov, and Spiš), as well as Alföld (Mintálová 2004). All these areas are dominated by foreign firms. For example, Slovakia is controlled by the Austrian (Rajo) and the French

(Ricard 2010). In Slovenia, a certain dynamism also exists, but in a very different Alpine context. Exploitations are more numerous, farm and craft products more important, and the country also has 4 PDO-rated cheeses, as many as in the rest of Central Europe.

### Territories which dropped out

This especially applies to Romania and Bulgaria, which had some cheese traditions, but where the communist era and the 1990s proved very difficult. Today, the average yield per cow is very low (Table 2) and the sectors inefficient. In Romania, privatisation brought to light a mass of small uncompetitive producers, out of touch in terms of health and without any future. Although Bucovina maintains some milk tradition in the highlands,

modernised farms are scarce and the 2007/2008 crisis highlighted the structural limitations of these two countries that no longer meet their quotas (Table 1) and have dropped out of the European competition.

### Situation outside the European Union

The part of the Balkans outside the Union suffers from a painful past (dictatorships, the wars of the 1990s, ethnic rivalries), a difficult post-communist transition and a blatant backwardness. Dairy production is low and keeps decreasing, local products do not develop well and processing industries are generally inefficient. Nevertheless, occidental industrials have started to show interest, such as Meggle which has invested in Albania, Bosnia, Bulgaria and Croatia. These countries account for little at a continental level, with seemingly an uncertain future, especially since a future integration in the EU may reveal even more their feeble structural competitiveness, as is currently the case for Croatia.

### CONCLUSION

Milk production has always been present in Central Europe, but in 2014, the territory truly appears to be on the dairy periphery, since these eight countries account for only 19% of EU production and 13.7% of its collection. In fact, the region is not as prominent in the dairy sector as it is in industry, the automotive one in particular. The sector proved relatively ineffective, with producers struggling to compete with their Western counterparts (better genetics, higher productivity etc.) and processors also less efficient. However, contemporary evolution shows an intense selection process that benefits Poland, the ex-GDR and the Baltic states, which now constitute a genuine dynamic dairy territory, and penalises Romania, Bulgaria and the Balkans which have suffered from a structural dropout.

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#### Résumé

#### L'Europe centrale dans l'Europe laitière

L'Europe centrale produit environ 20 % du lait du continent. Cette production s'appuie sur une certaine tradition, notamment dans les Carpates, mais elle a surtout été développée lors de la période communiste, dans le cadre de grandes exploitations collectives associées à des laiteries industrielles. Après 1989, ce système a été profondément transformé, conduisant à une réorganisation presque totale des filières (production et transformation). Vingt-cinq ans après, l'analyse montre de grandes différences régionales entre des zones qui se sont adaptées au nouveau contexte et sont devenues des territoires laitiers dynamiques (Ex-RDA, Pologne, Pays Baltes) et d'autres qui décrochent par manque d'organisation et de compétitivité (Roumanie, Bulgarie, Etats balkaniques hors Union Européenne).

#### Postavení střední Evropy v mlékárenském průmyslu Evropy

Střední Evropa produkuje asi 20 % mléka v rámci evropského kontinentu. Tato produkce je založena na tradici, a to zejména v Karpatech. Zmíněná tradice byla poté rozvíjena hlavně během komunistického

období, v rámci velkých zemědělských družstev v souvislosti s průmyslovými mlékárnami. Po roce 1989 došlo k zásadní změně tohoto systému, což vedlo k téměř úplné reorganizaci odvětví (výroba a zpracování). O 25 let později byly prokázány velké regionální rozdíly mezi oblastmi, které se přizpůsobily novému kontextu a staly se dynamickými mléčnými územími (bývalá NDR, Polsko, pobaltské státy), a jinými, kteří zaostávají vlivem nedostatečné organizace a konkurenceschopnosti (Rumunsko, Bulharsko, balkánské státy mimo Evropskou unii).

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