FAPRI 2006
Preliminary Baseline
December 15-16, 2005

INTERNATIONAL DAIRY

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Major Baseline Themes

- World Dairy Markets
  - Trade: Expansion
  - Prices: Gradual rise over the long term

- Major Exporters
  - Australia & New Zealand: Export growth
  - European Union: Export decline
  - Argentina: Export growth

- Major Importers
  - Asia: Steady growth of import demand
  - Russia: Import growth
Macro-Per Capita GDP

US Dollar per capita

China
Indonesia
Malaysia
Mexico
Philippines
Russia
Thailand

0 1000 2000 3000 4000 5000 6000

Dairy Product Output for Modeled Countries

Thousand MT

Million MT

Butter  Cheese  NFD  WMP  Milk

- 0
- 100
- 200
- 300
- 400
- 500
- 600
- 700

1995 1997 1999 2001 2003 2005 2007 2009 2011 2013 2015

- 0
- 5,000
- 10,000
- 15,000
- 20,000
- 25,000
Per-Capita Butter Consumption for Selected Countries

Kg per capita

- Argentina
- Australia
- EU-NMS
- EU-15
- India
- Japan
- Mexico
- New Zealand
- Russia
- Ukraine

Legend:
- 1996/2000
- 2001/2005
- 2006/2010
- 2011/2015
Per-Capita Cheese Consumption for Selected Countries

Kg per capita

Argentina, Australia, EU, NMS, EU-15, Japan, Mexico, New Zealand, Russia, Ukraine

- 1996/2000
- 2001/2005
- 2006/2010
- 2011/2015
Per-Capita NFD and WMP Consumption for Selected Countries

Kg per capita


China  Malaysia  Philippines  Indonesia  South Korea  Thailand  Vietnam  Venezuela
Net Import Growth: Major Importers

Thousand MT

Butter Cheese NFD WMP

China Egypt Indonesia Malaysia Mexico Philippines Russia
Australian Cow Inventory and Milk Yield
Australian Dairy Production

Thousand MT

Million MT

Butter  Cheese  NFD  WMP  Milk
Australian Dairy Net Exports

Thousand MT

Butter
Cheese
NFD
WMP
New Zealand Dairy Production

Thousand MT

Million MT

Butter  Cheese  NFD  WMP  Milk

New Zealand Dairy Production
New Zealand Dairy Net Exports

Thousand MT

- Butter
- Cheese
- NFD
- WMP
EU-15 Cow Inventory and Milk Yield

Thousand Head

kg per Head

Cow Inventory

Yield per Cow
EU-15 Dairy Production

Thousand MT

Million MT

Butter
Cheese
NFD
WMP
Milk

Years: 1995-2015

EU NMS Cow Inventory and Milk Yield

Thousand Head

kg per Head

Cow Inventory

Yield per Cow
EU NMS Dairy Production

Thousand MT

Million MT

1995 1997 1999 2001 2003 2005 2007 2009 2011 2013 2015

Butter Cheese NFD WMP Milk
Argentine Cow Inventory and Milk Yield
Argentine Dairy Net Exports

Thousand MT

- Butter
- Cheese
- NFD
- WMP
Brazilian Cow Inventory and Milk Yield

Thousand Head

kg per Head

Cow Inventory

Yield per Cow
Brazilian Dairy Production

Thousand MT

Million MT

Butter  Cheese  NFD  WMP  Milk

Brazilian Dairy Production
Brazilian Dairy Net Imports

Thousand MT

1995 1997 1999 2001 2003 2005 2007 2009 2011 2013 2015

Butter Cheese NFD WMP
Mexican Cow Inventory and Milk Yield

Thousand Head

kg per Head

Cow Inventory

Yield per Cow
Mexican Dairy Production

Thousand MT

Million MT

Butter  Cheese  NFD  WMP  Milk

Mexican Dairy Production
Mexican Dairy Net Imports

Thousand MT

- Butter
- Cheese
- NFD
- WMP
Colombian, Peruvian, Uruguayan, and Venezuelan Milk Production

Thousand MT

- Colombia
- Peru
- Venezuela
- Uruguay
Colombian, Peruvian, Uruguayan, and Venezuelan Dairy Net Imports

Thousand MT
Chinese Cow Inventory and Milk Yield

Cow Inventory

Yield per Cow

1995 1997 1999 2001 2003 2005 2007 2009 2011 2013 2015

Thousand Head

kg per Head

0 500 1,000 1,500 2,000 2,500 3,000 3,500 4,000

0 500 1,000 1,500 2,000 2,500 3,000 3,500 4,000

Chinese Cow Inventory and Milk Yield
Chinese Dairy Net Imports

Thousand MT

Butter  Cheese  NFD  WMP
Indian Cow Inventory and Milk Yield

- **Cow Inventory**
- **Yield per Cow**
Indian Milk Production

Thousand MT

1995 1997 1999 2001 2003 2005 2007 2009 2011 2013 2015

Cow Milk
Other Milk (Buffalo)
Indian NFD and Butter Production and Trade

Thousand MT

Million MT

1995 1997 1999 2001 2003 2005 2007 2009 2011 2013 2015

NFD Prod. NFD Net Exports Butter Net Imports Butter Prod.
Indonesian, Malaysian, Philippine, Thai, and Vietnamese Milk Production

Thousand MT

1995 1997 1999 2001 2003 2005 2007 2009 2011 2013 2015

Indonesian, Malaysian, Philippine, Thai, and Vietnamese Milk Production
Asian Dairy Net Imports

Thousand MT

Butter
Cheese
NFD
WMP

Asian Dairy Net Imports

Butter
Cheese
NFD
WMP
Russian Cow Inventory and Milk Yield

Cow Inventory

Yield per Cow

1995 1997 1999 2001 2003 2005 2007 2009 2011 2013 2015

0 2,000 4,000 6,000 8,000 10,000 12,000 14,000 16,000 18,000 20,000

0 500 1,000 1,500 2,000 2,500 3,000 3,500 4,000
Russian Dairy Production

Thousand MT

Million MT

Butter
Cheese
NFD
Milk

Russian Dairy Production
Russian Dairy Net Imports

Thousand MT

- Butter
- Cheese
- NFD
- WMP
Thank You!
Butter Net Exports for Selected Countries

Thousand MT

Australia
New Zealand
EU-15
Other ROW
Butter Net Imports for Selected Countries

Thousand MT

Asia  Egypt  Mexico  Russia  Other ROW
Cheese Net Exports for Selected Countries

Thousands MT

Argentina | Australia | EU-15 | New Zealand | Ukraine

1995 1997 1999 2001 2003 2005 2007 2009 2011 2013 2015
Cheese Net Imports for Selected Countries

Thousand MT

- Japan
- Mexico
- Russia
- United States
- Other ROW

NFD Net Imports for Selected Countries

Thousand MT

China
Indonesia
Malaysia
Mexico
Philippines
Thailand
Vietnam

[Bar chart showing trends for selected countries from 1995 to 2015]
WMP Net Exports for Selected Countries

Thousand MT

Argentina  Australia  EU-15  New Zealand  Other Exporters

WMP Net Imports for Selected Countries

Thousand MT

1995 1997 1999 2001 2003 2005 2007 2009 2011 2013 2015

China Indonesia Malaysia Philippines Thailand Venezuela Vietnam
EU-15 Dairy Net Exports

Thousand MT
Uruguay Dairy Production

<table>
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<tr>
<th>Year</th>
<th>Thousand MT</th>
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<td>2015</td>
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Uruguay Dairy Net Exports

Thousand MT

- Butter
- Cheese
- NFD
- WMP
Indian Dairy Product Consumption

Thousand MT

Million MT

Butter  NFD  Fluid Milk
Japanese Cow Inventory and Milk Yield

Cow Inventory: Thousand Head

Yield per Cow: kg per Head

Graph showing the trend of Japanese Cow Inventory and Milk Yield from 1995 to 2015.
South Korean Dairy Net Imports

Thousand MT

- Butter
- Cheese
- NFD

Import data over the years from 1995 to 2015, showing trends for Butter, Cheese, and NFD.
Indonesian Dairy Net Imports

Thousand MT

Butter  Cheese  NFD  WMP

1995  1997  1999  2001  2003  2005  2007  2009  2011  2013  2015
Philippine Dairy Net Imports

Thorousand MT

- Butter
- Cheese
- NFD
- WMP
Thai Dairy Net Imports

Thousand MT

- Butter
- Cheese
- NFD
- WMP

Year:
- 1995
- 1997
- 1999
- 2001
- 2003
- 2005
- 2007
- 2009
- 2011
- 2013
- 2015

Value:
- Thousand MT
Vietnam Dairy Net Imports

Thousand MT

Butter - Cheese - NFD - WMP