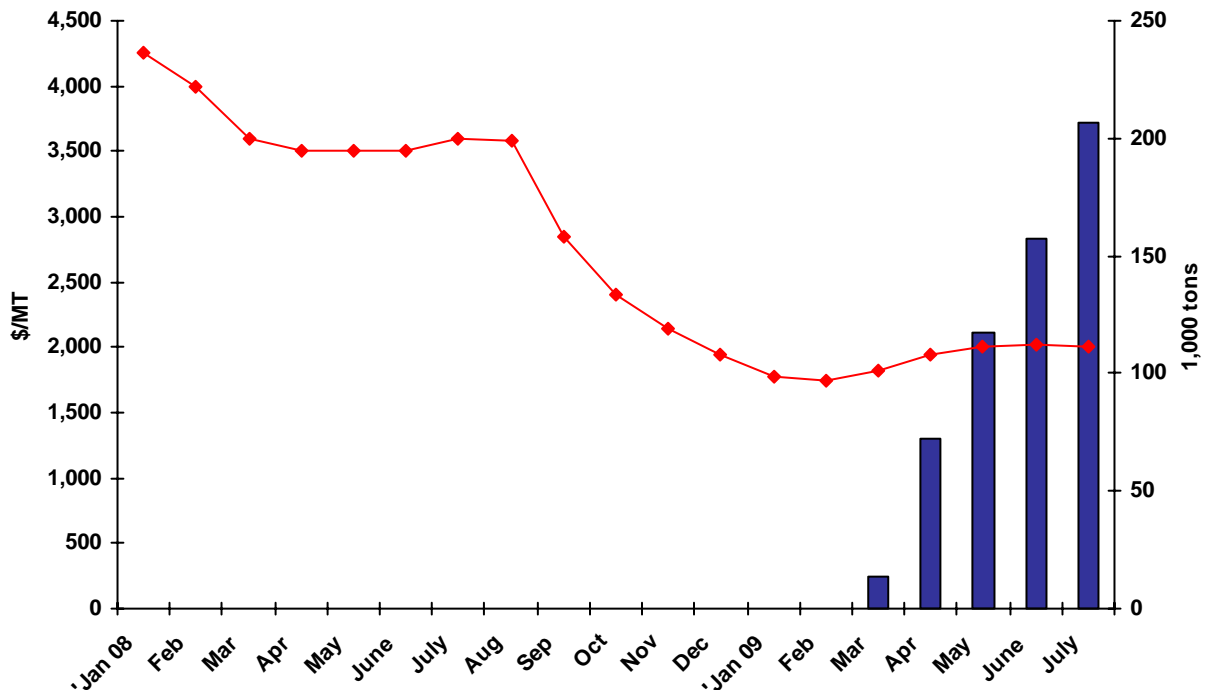


Dairy: World Markets and Trade

Aug 2009

Following a year during which international prices for nonfat dry milk (NDM) collapsed, prices have managed to post a modest increase and are now hovering around the \$2,000/ton FOB mark. While this may indicate some recovery in demand, further price increases are likely to be held in check by the rapid build-up of NDM stocks in the EU and the United States. In the EU, the buy-in period for intervention stores for butter and NDM has been extended and stocks of butter and NDM now total around 78,000 tons and 207,000 tons, respectively. In the United States, purchases of NDM – since October 1, 2008 through August 14, 2009 - under the price support program have totaled about 126,000 tons and the temporary increase in support prices is expected to lead to additional purchases. While an economic recovery will boost import demand, the disposal of these stocks may affect the degree of price recovery.

Oceania Prices (FOB) and EU Intervention Stocks



Dairy Production and Trade Developments

Summary

Global dairy markets appear to have stabilized and there are hints of some recovery as evidenced by the recent jump in the New Zealand whole milk powder auction prices. Nevertheless, while there are signs of improvement in the global economic outlook, the situation remains frail and the consensus view is that most major economies will recover at a slow pace. Among the major milk producers, the plight of the dairy sector has led to measures aimed at supporting the domestic milk prices. In the EU, dairy export subsidies were reactivated in January 2009 and the period - traditionally from March through August - for purchases under intervention has been extended until February 2010. In the United States, the Dairy Export Incentive Program was implemented in May 2009 and recently the CCC support prices for cheese and NDM were raised temporarily from August through October, 2009. One consequence of these policies is that there are now significant stocks of NDM overhanging markets that may dampen any price increases for the nearby future.

In terms of milk production, the most significant change in the 2009 forecast has been for U.S. milk output which has been lowered by nearly 2 percent to 85.4 million tons – a drop of 1 percent from the previous year. Low milk prices, high operating costs, and the impact of the industry sponsored Cooperatives Working Together program are expected to reduce the herd size by 1 percent. Domestic product prices are expected to favor the increased production of cheese – up 1 percent over 2008 – while butter and NDM production are both expected to decline. Exports are expected to take a significant hit from the global economic slowdown with butter exports in 2009 forecast to fall sharply by 76 percent from 2008 and NDM is forecast to drop by 49 percent.

In Oceania, milk output staged a significant comeback over 2008 with milk production in New Zealand slated to increase by 8 percent. The significant jump in New Zealand production is largely attributable to the slump in output during a season affected by drought. This year favorable pasture growing conditions and a record number of cows added further impetus to milk production. Australian milk production is expected to expand by 3 percent – reversing a four year trend – due to improved rainfall and pasture conditions. Nevertheless, the outlook for 2010 will be highly dependent on the set-up of climatic patterns particularly with respect to the “El Nino” and “La Nina” as water supplies for irrigation remain at extremely low levels

On the trade front, Oceania 2009 exports of cheese are expected to drop by 8 percent from the previous year while exports of butterfat and milk powders are anticipated to expand substantially. New Zealand exports of butterfat and NDM in 2009 are forecast to grow by 10 percent and 24 percent, respectively. In Australia, exports of WMP are expected to expand rapidly by 35 percent but nevertheless they remain below the average levels attained between 2004 and 2006.

EU milk production is forecast to remain relatively unchanged despite an increase in milk production quotas as dairy farmers experienced a record drop in farm-gate milk prices due to weak domestic demand for dairy products. As a result, the EU implemented a number of price supporting measures, primarily the activation of the export subsidies and extension of purchases under

intervention for butter and NDM. Exports of butterfat and NDM are anticipated to remain largely unchanged from 2008, while shipments of WMP are expected to decline by 20 percent. In contrast, exports of cheese are forecast to decline by 2 percent.

COWS MILK: SUMMARY FOR SELECTED COUNTRIES

1,000 Head

Milk Cow Numbers	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
Canada	1,055	1,066	1,019	995	985	980
Mexico	6,800	6,850	6,875	6,885	6,887	6,890
United States	9,010	9,050	9,137	9,189	9,315	9,195
Sub-total	16,865	16,966	17,031	17,069	17,187	17,065
South America						
Argentina	2,000	2,100	2,150	2,150	2,150	2,150
Brazil	15,200	15,100	15,290	15,925	16,700	17,023
Sub-total	17,200	17,200	17,440	18,075	18,850	19,173
European Union - 27 1/	26,018	25,355	24,944	24,178	23,951	23,900
Former Soviet Union						
Russia	11,200	10,400	9,900	9,910	9,800	9,705
Ukraine	4,313	4,130	3,840	3,221	2,979	2,770
Sub-total	15,513	14,530	13,740	13,131	12,779	12,475
South Asia						
India	37,000	38,000	38,000	38,000	38,500	38,500
Asia						
China	5,466	6,800	7,900	8,755	9,200	9,660
Japan	936	910	900	871	862	865
Sub-total	6,402	7,710	8,800	9,626	10,062	10,525
Oceania						
Australia 2/	2,036	2,041	1,870	1,800	1,730	1,730
New Zealand 3/	3,920	3,970	4,100	4,163	4,200	4,365
Sub-total	5,956	6,011	5,970	5,963	5,930	6,095
TOTAL SELECTED COUNTRIES	124,954	125,772	125,925	126,042	127,259	127,733

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Based on deliveries

(2) Year ending June 30 of the year shown.

(3) Year ending May 31 of the year shown.

ISAD/OGA/FAS

Aug 2009

COWS MILK: SUMMARY FOR SELECTED COUNTRIES

1,000 Metric Tons

Fluid Milk Production	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
Canada	7,905	7,806	8,041	8,212	8,270	8,250
Mexico	9,874	9,855	10,051	10,657	10,814	11,030
United States	77,488	80,255	82,455	84,211	86,179	85,366
Sub-total	95,267	97,916	100,547	103,080	105,263	104,646
South America						
Argentina	9,250	9,500	10,200	9,550	10,100	10,400
Brazil	23,317	24,250	25,230	26,750	28,890	30,335
Sub-total	32,567	33,750	35,430	36,300	38,990	40,735
European Union - 27 1/	133,969	134,672	132,206	132,604	134,346	134,300
Former Soviet Union						
Russia	32,000	32,000	31,100	32,200	32,500	32,830
Ukraine	13,787	13,423	12,890	11,997	11,070	10,350
Sub-total	45,787	45,423	43,990	44,197	43,570	43,180
South Asia						
India	37,500	37,520	41,000	42,890	44,100	45,140
Asia						
China	22,606	27,534	31,934	35,252	36,700	38,630
Japan	8,329	8,285	8,137	8,007	7,990	8,010
Sub-total	30,935	35,819	40,071	43,259	44,690	46,640
Oceania						
Australia 2/	10,377	10,429	10,395	9,870	9,500	9,785
New Zealand 3/	15,000	14,500	15,200	15,640	15,141	16,400
Sub-total	25,377	24,929	25,595	25,510	24,641	26,185
TOTAL SELECTED COUNTRIES	401,402	410,029	418,839	427,840	435,600	440,826

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Based on deliveries

(2) Year ending June 30 of the year shown.

(3) Year ending May 31 of the year shown.

ISAD/OGA/FAS

Aug 2009

COWS MILK : SUMMARY FOR SELECTED COUNTRIES

MT/Head

Fluid Milk Production Per Cow	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
Canada	7.49	7.32	7.89	8.25	8.40	8.42
Mexico	1.45	1.44	1.46	1.55	1.57	1.60
United States	8.60	8.87	9.02	9.16	9.25	9.28
South America						
Argentina	4.63	4.52	4.74	4.44	4.70	4.84
Brazil	1.53	1.61	1.65	1.68	1.73	1.78
European Union - 27 1/	5.15	5.31	5.30	5.48	5.61	5.62
Former Soviet Union						
Russia	2.86	3.08	3.14	3.25	3.32	3.38
Ukraine	3.20	3.25	3.36	3.72	3.72	3.74
South Asia						
India	1.01	0.99	1.08	1.13	1.15	1.17
Asia						
China	4.14	4.05	4.04	4.03	3.99	4.00
Japan	8.90	9.10	9.04	9.19	9.27	9.26
Oceania						
Australia 2/	5.10	5.11	5.56	5.48	5.49	5.66
New Zealand 3/	3.83	3.65	3.71	3.76	3.61	3.76

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Based on deliveries

(2) Year ending June 30 of the year shown.

(3) Year ending May 31 of the year shown.

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COWS MILK: SUMMARY FOR SELECTED COUNTRIES

1,000 Metric Tons

Fluid Milk Consumption	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
Canada	2,835	2,831	3,058	3,086	3,145	3,135
Mexico	4,349	4,266	4,305	4,275	4,253	4,275
United States	27,093	27,220	27,515	27,536	27,670	27,789
Sub-total	34,277	34,317	34,878	34,897	35,068	35,199
South America						
Argentina	1,800	1,800	1,900	1,900	1,950	1,970
Brazil	12,743	13,400	13,755	10,170	10,674	11,230
Sub-total	14,543	15,200	15,655	12,070	12,624	13,200
European Union - 27 1/	35,190	34,932	34,084	33,334	33,669	33,680
Former Soviet Union						
Russia	12,900	12,845	12,000	12,000	12,100	12,180
Ukraine	5,112	5,441	6,086	3,641	2,779	2,109
Sub-total	18,012	18,286	18,086	15,641	14,879	14,289
South Asia						
India	35,500	36,600	39,920	42,680	43,885	45,035
Asia						
China	10,315	12,500	13,809	14,820	15,300	15,966
Japan	4,955	4,775	4,648	4,521	4,450	4,400
Sub-total	15,270	17,275	18,457	19,341	19,750	20,366
Oceania						
Australia 2/	2,020	2,145	2,127	2,162	2,205	2,316
New Zealand 3/	360	360	360	360	345	331
Sub-total	2,380	2,505	2,487	2,522	2,550	2,647
TOTAL SELECTED COUNTRIES	155,172	159,115	163,567	160,485	162,425	164,416

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Based on deliveries

(2) Year ending June 30 of the year shown.

(3) Year ending May 31 of the year shown.

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CHEESE PRODUCTION: SUMMARY FOR SELECTED COUNTRIES 1/

1,000 Metric Tons

	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
Canada	345	352	291	308	306	305
Mexico	134	143	145	147	150	152
United States	4,025	4,150	4,320	4,435	4,506	4,540
Sub-total	4,504	4,645	4,756	4,890	4,962	4,997
South America						
Argentina	370	400	480	520	540	550
Brazil	470	495	528	580	630	660
Sub-total	840	895	1,008	1,100	1,170	1,210
European Union - 27	6,481	6,625	6,801	6,760	6,840	6,850
Former Soviet Union						
Russia	350	375	405	435	425	435
Ukraine	224	274	210	244	256	260
Sub-total	574	649	615	679	681	695
Asia						
Japan	35	39	40	43	55	60
Korea	24	24	28	24	26	27
Philippines	6	5	6	7	9	10
Sub-total	65	68	74	74	90	97
Oceania						
Australia 2/	389	375	362	360	344	335
New Zealand 3/	305	297	292	308	314	345
Sub-total	694	672	654	668	658	680
TOTAL SELECTED COUNTRIES	13,158	13,554	13,908	14,171	14,401	14,529

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Excludes fresh cheese

(2) Year ending June 30 of the year shown.

(3) Year ending May 31 of the year shown.

ISAD/OGA/FAS

Aug. 2009

CHEESE CONSUMPTION: SUMMARY FOR SELECTED COUNTRIES 1/

1,000 Metric Tons

	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
Canada	358	365	307	319	319	315
Mexico	214	230	229	233	238	240
United States	4,183	4,275	4,428	4,542	4,523	4,580
Sub-total	4,755	4,870	4,964	5,094	5,080	5,135
South America						
Argentina	338	350	424	473	490	500
Brazil	468	491	529	576	627	654
Sub-total	806	841	953	1,049	1,117	1,154
European Union - 27	6,061	6,219	6,339	6,309	6,443	6,455
Former Soviet Union						
Russia	528	615	625	675	683	707
Ukraine	133	164	170	194	191	201
Sub-total	661	779	795	869	874	908
Asia						
Japan	254	251	247	268	260	270
Korea	65	69	72	74	78	82
Sub-total	319	320	319	342	338	352
Oceania						
Australia 2/	230	223	225	215	215	215
New Zealand 3/	28	28	28	28	28	28
Sub-total	258	251	253	243	243	243
TOTAL SELECTED COUNTRIES	12,860	13,280	13,623	13,906	14,095	14,247

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Excludes fresh cheese

(2) Year ending June 30 of the year shown.

(3) Year ending May 31 of the year shown.

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CHEESE IMPORTS: SUMMARY FOR SELECTED COUNTRIES 1/

1,000 Metric Tons

	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
Canada	24	25	25	26	25	25
Mexico	82	89	86	89	90	90
United States	214	209	206	197	172	155
Sub-total	320	323	317	312	287	270
South America						
Argentina	0	2	2	3	3	2
Brazil	4	3	6	4	5	4
Sub-total	4	5	8	7	8	6
European Union - 27	104	93	99	83	93	85
Former Soviet Union						
Russia	190	250	230	250	270	280
Ukraine	3	6	8	12	13	11
Sub-total	193	256	238	262	283	291
Asia						
Japan	219	212	207	225	205	210
Korea	41	44	44	50	52	55
Philippines	6	5	6	7	9	10
Sub-total	266	261	257	282	266	275
Oceania						
Australia 2/	49	49	61	64	70	55
New Zealand 3/	2	2	3	3	6	6
Sub-total	51	51	64	67	76	61
TOTAL SELECTED COUNTRIES	938	989	983	1,013	1,013	988

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Excludes fresh cheese

(2) Year ending June 30 of the year shown.

(3) Year ending May 31 of the year shown.

CHEESE EXPORTS: SUMMARY FOR SELECTED COUNTRIES 1/

1,000 Metric Tons

	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
Canada	11	9	9	9	10	8
Mexico	2	2	2	3	2	2
United States	61	58	71	99	131	100
Sub-total	74	69	82	111	143	110
South America						
Argentina	31	45	58	45	36	56
Brazil	6	7	5	8	8	10
Sub-total	37	52	63	53	44	66
European Union - 27	524	499	561	534	490	480
Former Soviet Union						
Russia	10	10	10	10	10	10
Ukraine	94	116	50	62	78	70
Sub-total	104	126	60	72	88	80
Oceania						
Australia 2/	212	227	202	212	202	177
New Zealand 3/	289	265	267	309	283	270
Sub-total	501	492	469	521	485	447
TOTAL SELECTED COUNTRIES	1,240	1,238	1,235	1,291	1,250	1,183

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Excludes fresh cheese

(2) Year ending June 30 of the year shown.

(3) Year ending May 31 of the year shown.

ISAD/OGA/FAS Aug. 2009

BUTTER PRODUCTION: SUMMARY FOR SELECTED COUNTRIES 3/

1,000 Metric Tons

	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
Canada	84	84	75	79	84	80
Mexico	88	93	109	126	130	132
United States	565	611	657	695	746	730
Sub-total	737	788	841	900	960	942
South America						
Brazil	75	77	79	82	84	86
European Union - 27	2,164	2,155	2,035	2,053	2,072	2,110
Former Soviet Union						
Russia	270	275	290	300	305	310
Ukraine	138	118	105	100	89	88
Sub-total	408	393	395	400	394	398
Asia						
India	2,600	2,749	3,050	3,360	3,695	4,065
Japan	80	84	80	75	73	75
Sub-total	2,680	2,833	3,130	3,435	3,768	4,140
Oceania						
Australia 1/	132	131	129	117	111	118
New Zealand 2/	418	379	390	419	391	430
Sub-total	550	510	519	536	502	548
TOTAL SELECTED COUNTRIES	6,614	6,756	6,999	7,406	7,780	8,224

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Year ending June 30 of the year shown.

(2) Year ending May 31 of the year shown.

(3) Includes butter equivalent of butteroil/anhydrous milk fat.

ISAD/OGA/FAS

Aug-09

BUTTER CONSUMPTION: SUMMARY FOR SELECTED COUNTRIES 3/

1,000 Metric Tons

	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
Canada	93	86	79	78	85	82
Mexico	141	144	158	179	188	194
United States	604	611	641	651	662	708
Sub-total	838	841	878	908	935	984
South America						
Brazil	75	77	79	80	81	82
European Union - 27	1,948	1,943	1,934	2,006	1,979	2,013
Former Soviet Union						
Russia	437	385	400	420	438	440
Ukraine	103	94	92	97	82	81
Sub-total	540	479	492	517	520	521
Asia						
India	2,608	2,743	3,055	3,360	3,687	4,062
Japan	88	86	89	92	85	85
Taiwan	12	11	12	11	13	14
Sub-total	2,708	2,840	3,156	3,463	3,785	4,161
Oceania						
Australia 2/	60	65	62	55	58	60
New Zealand 3/	26	26	26	26	26	26
Sub-total	86	91	88	81	84	86
TOTAL SELECTED COUNTRIES	6,195	6,271	6,627	7,055	7,384	7,847

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Year ending June 30 of the year shown.

(2) Year ending May 31 of the year shown.

(3) Includes butter equivalent of butteroil/anhydrous milk fat.

ISAD/OGA/FAS

Aug-09

BUTTER IMPORTS: SUMMARY FOR SELECTED COUNTRIES 3/

1,000 Metric Tons

	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
Canada	28	24	15	13	8	10
Mexico	53	51	49	53	58	62
United States	23	16	17	18	5	6
Sub-total	104	91	81	84	71	78
South America						
Brazil	1	1	1	1	1	1
European Union - 27	93	81	84	93	65	80
Former Soviet Union						
Russia	170	110	115	130	135	135
Ukraine	0	0	0	0	0	0
Sub-total	170	110	115	130	135	135
Asia						
India	10	1	10	10	0	5
Japan	7	6	4	11	14	10
Taiwan	11	12	11	14	10	11
Sub-total	28	19	25	35	24	26
Oceania						
Australia 2/	9	10	10	13	20	15
New Zealand 3/	0	1	1	1	2	2
Sub-total	9	11	11	14	22	17
TOTAL SELECTED COUNTRIES	405	313	317	357	318	337

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Year ending June 30 of the year shown.

(2) Year ending May 31 of the year shown.

(3) Includes butter equivalent of butteroil/anhydrous milk fat.

ISAD/OGA/FAS

Aug-09

BUTTER EXPORTS: SUMMARY FOR SELECTED COUNTRIES 3/

1,000 Metric Tons

	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
Canada	17	20	18	13	3	11
Mexico	0	0	0	0	0	0
United States	9	9	11	41	105	25
Sub-total	26	29	29	54	108	36
South America						
Brazil	1	1	1	3	4	5
European Union - 27	353	340	248	216	151	150
Former Soviet Union						
Russia	0	0	0	0	0	0
Ukraine	42	24	18	4	7	7
Sub-total	42	24	18	4	7	7
Asia						
India	2	7	5	10	8	8
Sub-total	2	7	5	10	8	8
Oceania						
Australia 2/	75	70	82	80	59	70
New Zealand 3/	400	316	366	439	367	405
Sub-total	475	386	448	519	426	475
TOTAL SELECTED COUNTRIES	899	787	749	806	704	681

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Year ending June 30 of the year shown.

(2) Year ending May 31 of the year shown.

(3) Includes butter equivalent of butteroil/anhydrous milk fat.

ISAD/OGA/FAS

Aug-09

NONFAT DRY MILK PRODUCTION: SUMMARY FOR SELECTED COUNTRIES

1,000 Metric Tons

	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
Canada	90	73	72	75	83	80
Mexico	155	155	183	202	195	195
United States 1/	641	695	687	680	859	836
Sub-total	886	923	942	957	1,137	1,111
South America						
Argentina	35	40	30	24	25	25
Brazil	110	113	117	128	133	140
Sub-total	145	153	147	152	158	165
European Union - 27	1,074	1,074	955	1,005	990	1,050
Former Soviet Union						
Russia	125	110	110	115	120	122
Ukraine	78	78	80	90	65	58
Sub-total	203	188	190	205	185	180
Asia						
China	68	60	55	58	60	63
India	235	256	295	320	345	370
Japan	183	187	180	173	170	175
Korea	25	24	18	22	23	22
Sub-total	511	527	548	573	598	630
Oceania						
Australia 3/	203	206	221	205	177	200
New Zealand 4/	274	225	247	304	265	310
Sub-total	477	431	468	509	442	510
TOTAL SELECTED COUNTRIES	3,151	3,143	3,103	3,249	3,352	3,481

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Includes NDM production plus preliminary estimate of other SMP production.

(2) Based on deliveries

(3) Year ending June 30 of the year shown.

(4) Year ending May 31 of the year shown.

ISAD/OGA/FAS

Aug-2009

NONFAT DRY MILK CONSUMPTION: SUMMARY FOR SELECTED COUNTRIES
1,000 Metric Tons

	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
Canada	54	71	75	65	50	50
Mexico	300	311	296	313	358	360
United States	624	572	437	400	404	537
Sub-total	978	954	808	778	812	947
South America						
Argentina	19	18	12	9	9	10
Brazil	112	115	122	128	138	143
Sub-total	131	133	134	137	147	153
European Union - 27	968	963	896	813	819	750
Former Soviet Union						
Russia	170	165	140	150	160	167
Ukraine	15	21	16	33	25	28
Sub-total	185	186	156	183	185	195
Asia						
China	127	115	116	94	112	127
India	230	225	245	270	307	337
Indonesia	115	121	132	145	156	167
Japan	189	197	200	204	185	190
Korea	31	30	28	25	26	26
Philippines	94	77	78	81	70	80
Taiwan	17	19	20	20	15	17
Sub-total	803	784	819	839	871	944
Oceania						
Australia 2/	20	35	38	42	45	45
New Zealand 3/	5	5	5	5	3	3
Sub-total	25	40	43	47	48	48
TOTAL SELECTED COUNTRIES	3,090	3,060	2,856	2,797	2,882	3,037

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Includes NDM production plus preliminary estimate of other SMP production.

(2) Based on deliveries

(3) Year ending June 30 of the year shown.

(4) Year ending May 31 of the year shown.

ISAD/OGA/FAS

Aug-2009

NONFAT DRY MILK IMPORTS: SUMMARY FOR SELECTED COUNTRIES

1,000 Metric Tons

	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
Canada	2	4	3	3	4	2
Mexico	141	155	113	111	163	165
United States	1	5	2	2	1	1
Sub-total	144	164	118	116	168	168
South America						
Argentina	0	0	0	0	0	0
Brazil	4	5	9	4	6	5
Sub-total	4	5	9	4	6	5
European Union - 27	30	10	21	10	8	5
Former Soviet Union						
Russia	65	70	45	50	55	60
Ukraine	0	0	0	0	0	0
Sub-total	65	70	45	50	55	60
North Africa						
Algeria	75	72	68	91	91	90
Asia						
China	61	55	62	40	54	65
India	15	0	0	0	0	0
Indonesia	125	135	140	147	159	172
Japan	37	34	32	36	35	50
Korea	4	6	7	5	4	5
Philippines	120	87	95	98	85	95
Taiwan	17	19	20	20	15	17
Sub-total	379	336	356	346	352	404
Oceania						
Australia 2/	2	4	5	4	4	3
New Zealand 3/	1	1	1	1	1	1
Sub-total	3	5	6	5	5	4
TOTAL SELECTED COUNTRIES	625	590	555	531	594	646

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Includes NDM production plus preliminary estimate of other SMP production.

(2) Based on deliveries

(3) Year ending June 30 of the year shown.

(4) Year ending May 31 of the year shown.

ISAD/OGA/FAS

Aug-2009

NONFAT DRY MILK EXPORTS: SUMMARY FOR SELECTED COUNTRIES
1,000 Metric Tons

	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
Canada	16	6	13	14	15	13
Mexico	0	0	0	0	0	0
United States 1/	231	277	287	255	391	200
Sub-total	247	283	300	269	406	213
South America						
Argentina	18	22	21	11	13	17
Brazil	2	3	4	4	1	2
Sub-total	20	25	25	15	14	19
European Union - 27	277	190	88	202	179	180
Former Soviet Union						
Russia	20	15	15	15	15	15
Ukraine	63	57	64	57	40	30
Sub-total	83	72	79	72	55	45
Asia						
China	2	0	1	4	2	1
India	10	40	50	40	38	38
Indonesia	12	10	10	5	5	5
Japan	0	0	0	0	0	0
Korea	0	0	0	0	0	0
Philippines	16	18	18	18	15	15
Sub-total	40	68	79	67	60	59
Oceania						
Australia 3/	187	141	189	175	120	170
New Zealand 4/	305	221	243	327	251	310
Sub-total	492	362	432	502	371	480
TOTAL SELECTED COUNTRIES	1,159	1,000	1,003	1,127	1,085	996

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Includes NDM production plus preliminary estimate of other SMP production.

(2) Based on deliveries

(3) Year ending June 30 of the year shown.

(4) Year ending May 31 of the year shown.

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WHOLE MILK POWDER PRODUCTION: SUMMARY FOR SELECTED COUNTRIES
1,000 Metric Tons

	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
United States	19	15	14	14	23	20
Sub-total	19	15	14	14	23	20
South America						
Argentina	260	255	260	186	217	225
Brazil	420	440	465	526	580	640
Chile	51	47	50	53	70	75
Sub-total	731	742	775	765	867	940
European Union - 27	857	858	800	776	860	775
Former Soviet Union						
Russia	90	85	90	95	105	110
Ukraine	28	28	26	35	40	37
Sub-total	118	113	116	130	145	147
Asia						
China	832	918	1,030	1,150	1,200	1,270
Indonesia	45	48	48	47	48	51
Taiwan	6	5	1	1	2	0
Sub-total	883	971	1,079	1,198	1,250	1,321
Oceania						
Australia 2/	187	189	152	135	142	145
New Zealand 3/	628	585	611	653	651	710
Sub-total	815	774	763	788	793	855
TOTAL SELECTED COUNTRIES	3,423	3,473	3,547	3,671	3,938	4,058

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Based on deliveries

(2) Year ending June 30 of the year shown.

(3) Year ending May 31 of the year shown.

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Aug-2009

WHOLE MILK POWDER CONSUMPTION: SUMMARY FOR SELECTED COUNTRIES

1,000 Metric Tons

	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
United States	19	20	15	23	22	24
Sub-total	19	20	15	23	22	24
South America						
Argentina	86	98	54	59	67	71
Brazil	440	445	479	503	525	545
Sub-total	526	543	533	562	592	616
European Union - 27	347	369	381	412	377	390
Former Soviet Union						
Russia	109	110	100	115	135	143
Ukraine	10	8	8	17	17	18
Sub-total	119	118	108	132	152	161
North Africa						
Algeria	0	0	0	0	0	0
Asia						
China	898	951	1,071	1,137	1,146	1,278
Indonesia	65	75	74	74	91	95
Philippines	17	9	10	10	14	14
Taiwan	36	31	31	31	22	25
Sub-total	1,016	1,066	1,186	1,252	1,273	1,412
Oceania						
Australia 2/	23	22	27	27	27	29
New Zealand 3/	1	1	1	1	1	1
Sub-total	24	23	28	28	28	30
TOTAL SELECTED COUNTRIES	2,051	2,139	2,251	2,409	2,444	2,633

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Based on deliveries

(2) Year ending June 30 of the year shown.

(3) Year ending May 31 of the year shown.

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WHOLE MILK POWDER IMPORTS: SUMMARY FOR SELECTED COUNTRIES

1,000 Metric Tons

	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
United States	8	13	13	19	18	14
Sub-total	8	13	13	19	18	14
South America						
Argentina	1	3	1	2	1	1
Brazil	21	25	31	11	13	10
Sub-total	22	28	32	13	14	11
European Union - 27	4	3	3	2	1	1
Former Soviet Union						
Russia	25	30	15	25	35	38
Ukraine	0	0	0	0	0	0
Sub-total	25	30	15	25	35	38
North Africa						
Algeria	0	0	0	0	0	0
Asia						
China	91	65	74	59	35	38
Indonesia	21	26	27	27	44	44
Philippines	45	35	40	42	50	52
Taiwan	30	26	30	30	20	25
Sub-total	187	152	171	158	149	159
Oceania						
Australia 2/	12	15	13	11	13	10
New Zealand 3/	2	1	1	1	1	1
Sub-total	14	16	14	12	14	11
TOTAL SELECTED COUNTRIES	260	242	248	229	231	234

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Based on deliveries

(2) Year ending June 30 of the year shown.

(3) Year ending May 31 of the year shown.

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WHOLE MILK POWDER EXPORTS: SUMMARY FOR SELECTED COUNTRIES
1,000 Metric Tons

	2004	2005	2006	2007	(p) 2008	(f) 2009
North America						
United States	8	8	12	10	19	10
Sub-total	8	8	12	10	19	10
South America						
Argentina	177	162	210	117	123	150
Brazil	16	26	17	42	75	110
Chile	8	6	7	10	14	20
Sub-total	201	194	234	169	212	280
European Union - 27	514	492	422	366	484	386
Former Soviet Union						
Russia	6	5	5	5	5	5
Ukraine	18	20	18	18	23	19
Sub-total	24	25	23	23	28	24
Asia						
China	25	32	33	72	54	30
Philippines	28	26	30	32	36	38
Sub-total	53	58	63	104	90	68
Oceania						
Australia 2/	173	161	153	130	111	150
New Zealand 3/	669	585	634	670	621	664
Sub-total	842	746	787	800	732	814
TOTAL SELECTED COUNTRIES	1,642	1,523	1,541	1,472	1,565	1,582

Source: Counselor and attache reports, official statistics, and results of office research.

Notes:

(p) Preliminary.

(f) Forecast.

(1) Based on deliveries

(2) Year ending June 30 of the year shown.

(3) Year ending May 31 of the year shown.

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