Deutsches Nationalkomitee
im Internationalen
Milchwirtschaftsverband - IDF

Verband der Deutschen
Milchwirtschaft e. V. - VDM

„Open Day" 2011

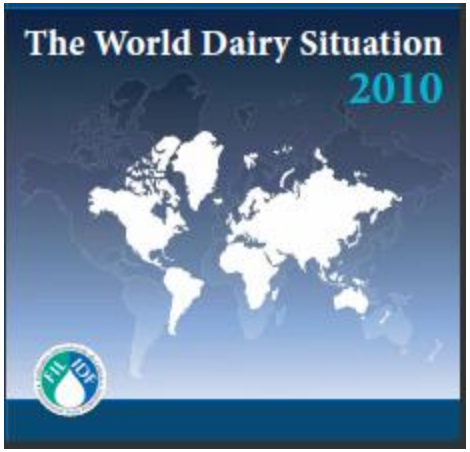
Offenes Diskussionsforum
des Deutschen Nationalkomitees
im Internationalen Milchwirtschaftsverband – IDF

Berlin, 16. März 2011

Die World Dairy Situation

IDF Open Day

Berlin, 16. März 2011



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Die World Dairy Situation…

- Regelmäßiges Bulletin des IDF
- Zuständig ist das Standing Committee für Politik und Ökonomie
- Erstellung durch
  - Milk Marketing Board, Großbritannien bis 1998
  - ZMP/ZMB bis 2009
  - CNIEL und Productshap Zuivel seit 2010
- Erscheint jährlich, seit einigen Jahren in elektronischer Form
- Wird jährlich zum Welt-Milch-Gipfel veröffentlicht und dort präsentiert
- Ist die zentrale Publikation des IDF zur ökonomischen und politischen Situation am Weltmarkt
- Enthält umfassende Statistiken, Grafiken und Analysen

Inhalte

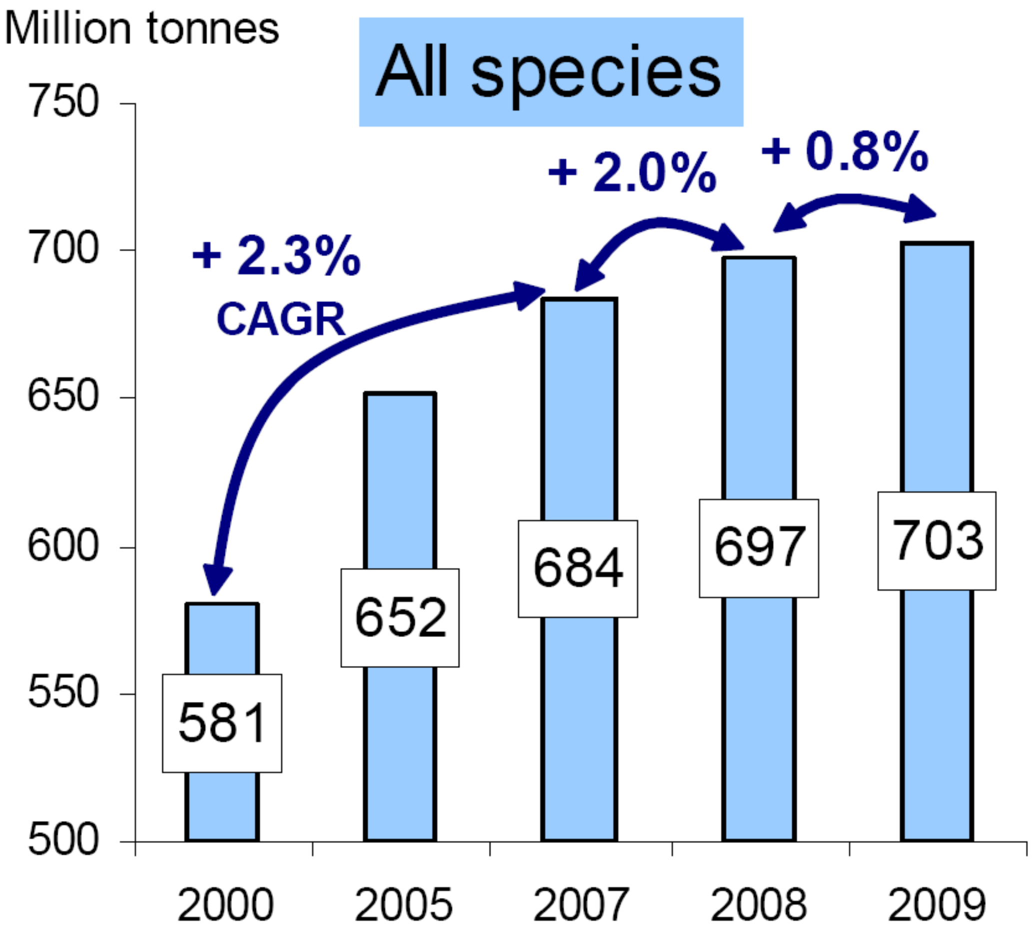
- Produktion von Kuh-, Büffel-, Ziegen-, Schafmilch sowie Milch anderer Tiere
- Verarbeitung von Milch in Molkereien
- Entwicklung der Milchindustrie
- Verbrauch von Milchprodukten
- Welthandel mit Milchprodukten
- Zusammenfassung von Prognosen und Veröffentlichungen renommierter Einrichtungen zum Thema Milchmarkt- und Politik
- Länderportraits mit wichtigsten Fakten und Entwicklungen

Vorgehensweise

- Erhebung der Daten durch standardisierte Befragung der National-Komitee der Mitglieder des IDF
  - 56 Länder auf allen Kontinenten
- Befragung bekannter Institutionen in Nicht-Mitgliedsländern
- Ergänzung der Daten durch Auswertung verfügbarer statistischer Quellen
- Einbeziehung von Material der Autoren
- Abgleich der Informationen
- Aufbereitung, Veranschaulichung und Kommentierung

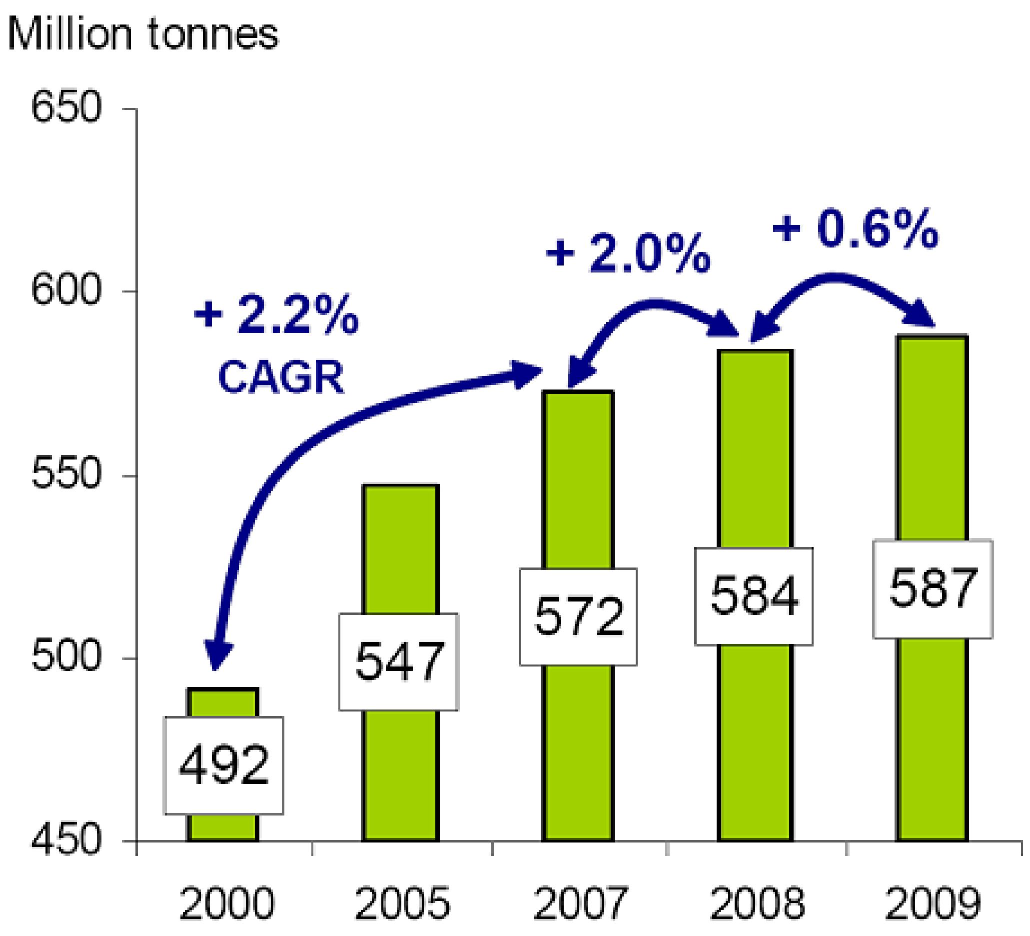
World milk production

Growth slowed down in 2009.



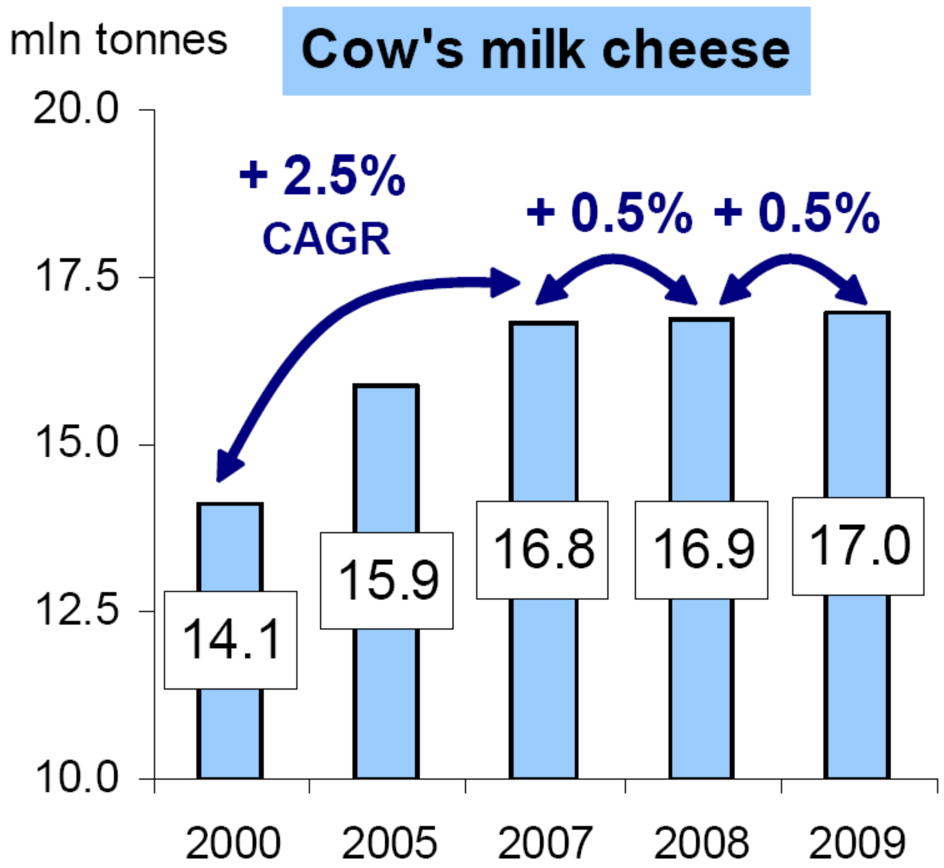
World milk production

Cow's milk: lowest growth since 1997.



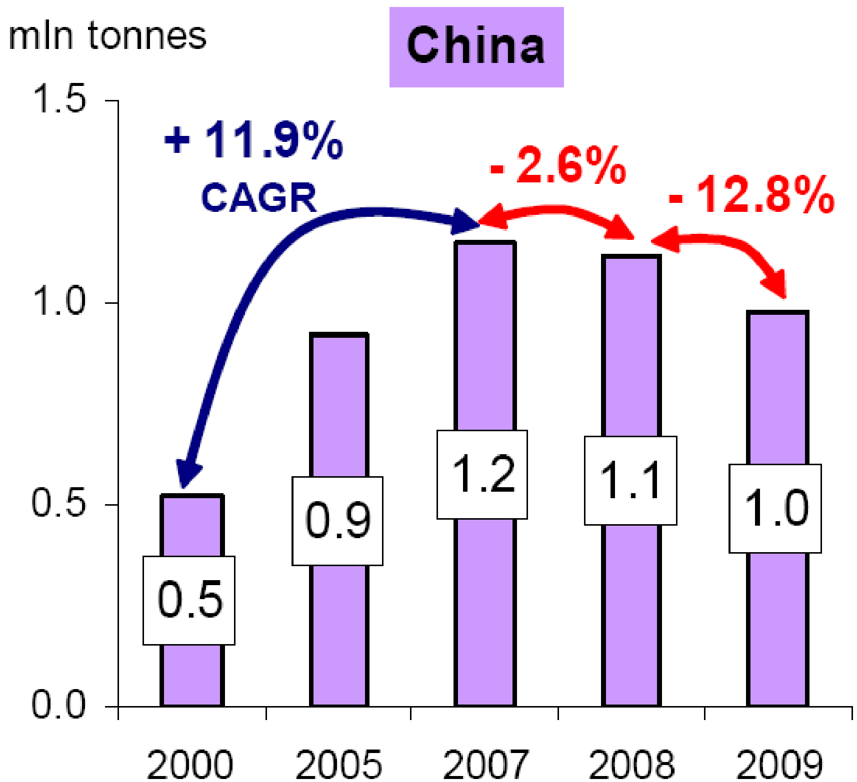
Processing: cheese

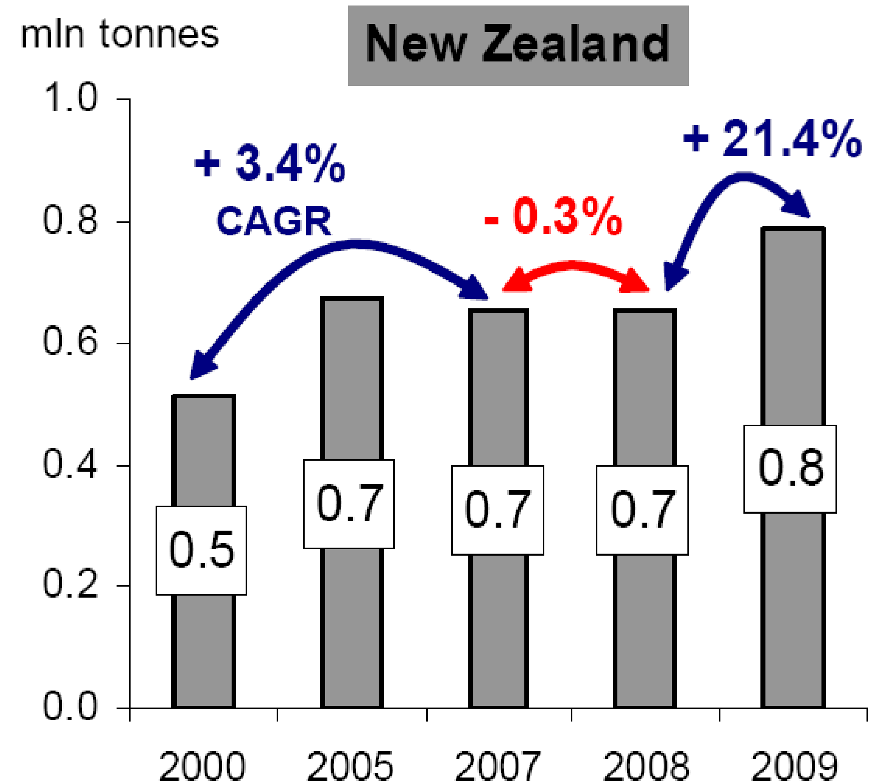
In 2009 production increased moderately.



Processing: whole milk powder

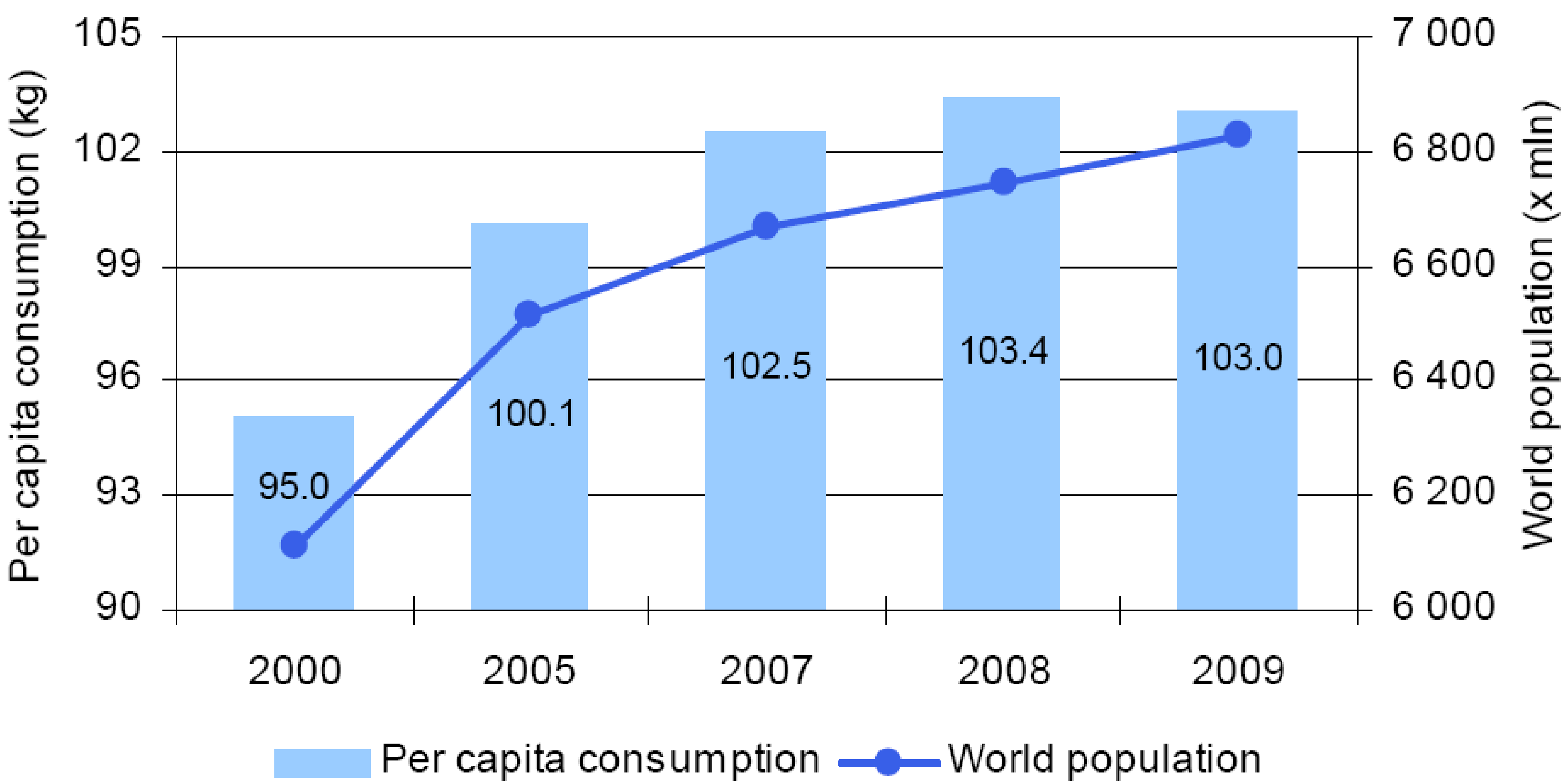
Global development 2000-2009 for the two main players





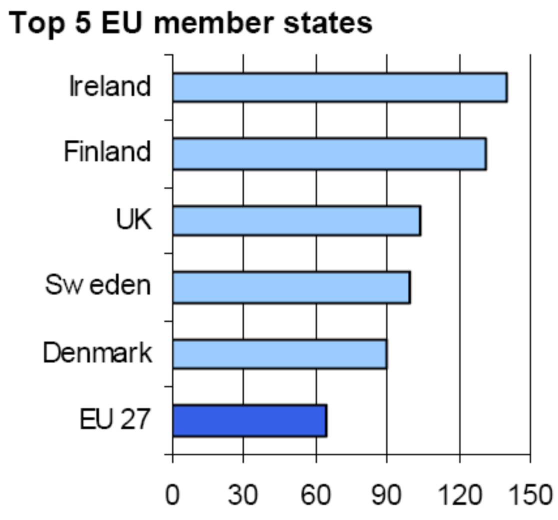
Consumption

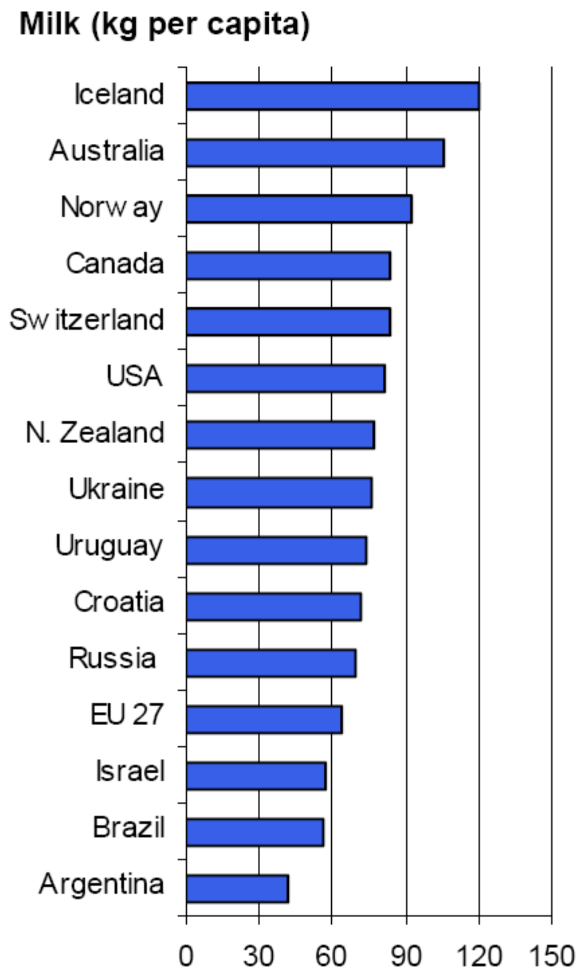
Global per capita consumption declined for the first time in years.



Consumption: milk

Per capita consumption of milk in selected countries (year: 2009).

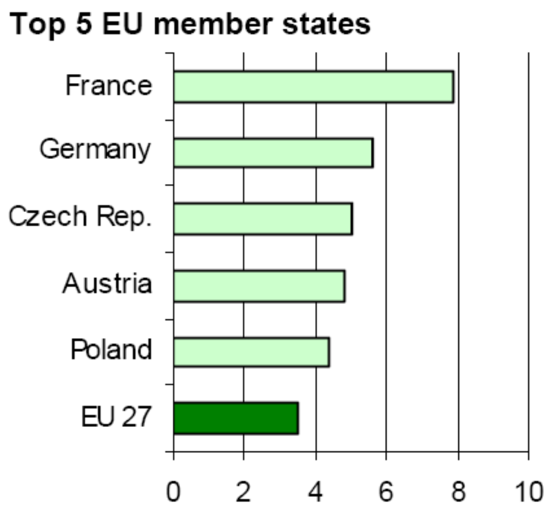


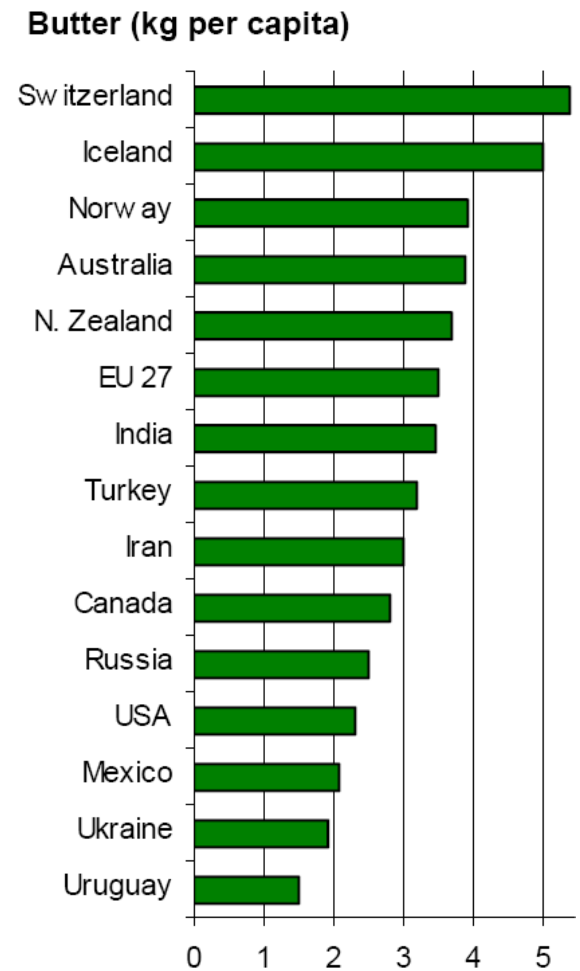


IDF World Dairy Summit 2010 New Zealand

Consumption: butter

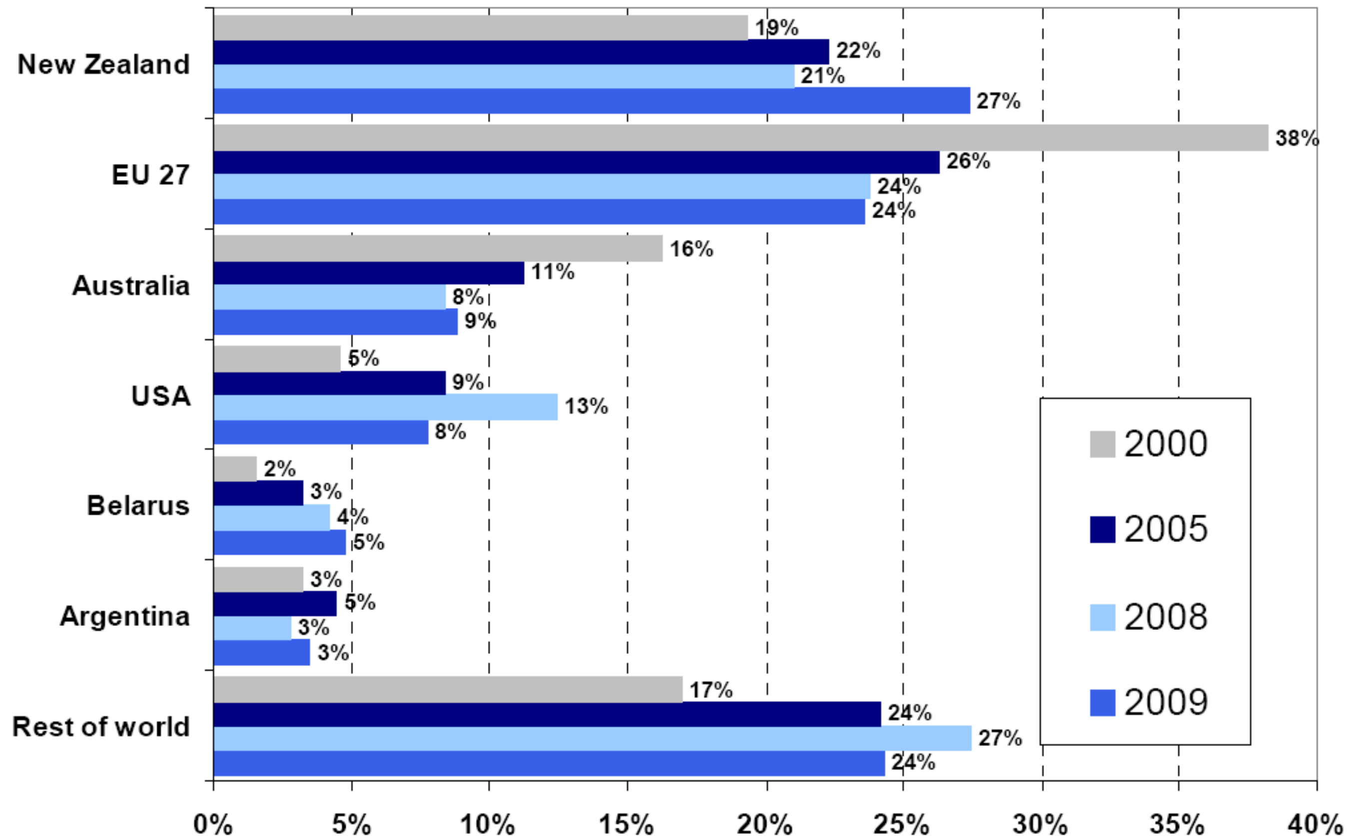
Per capita consumption of butter in selected countries (year: 2009).





Trade

New Zealand resumed its leading position as prime supplier to the world dairy market.



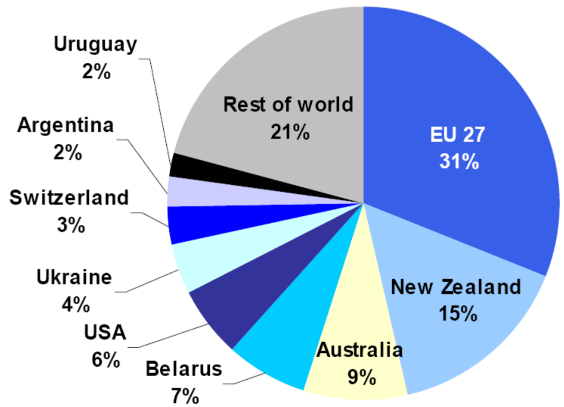
a) As part of total world trade volume, reference volumes (million tonnes) used: 2000: 38.8 / 2005: 43.9 / 2008: 46.8 / 2009: 49.8.

IDF World Dairy Summit 2010 New Zealand

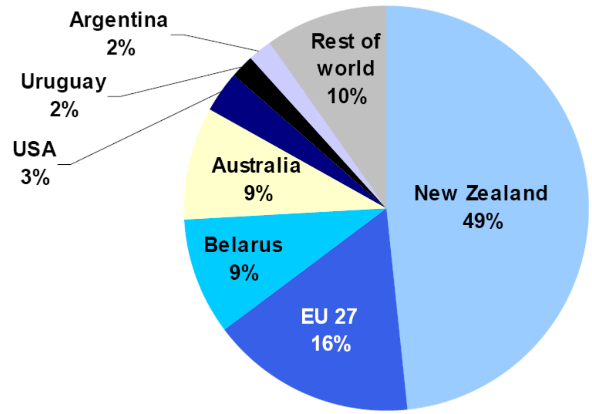
Trade

Supply to the world market remains concentrated.

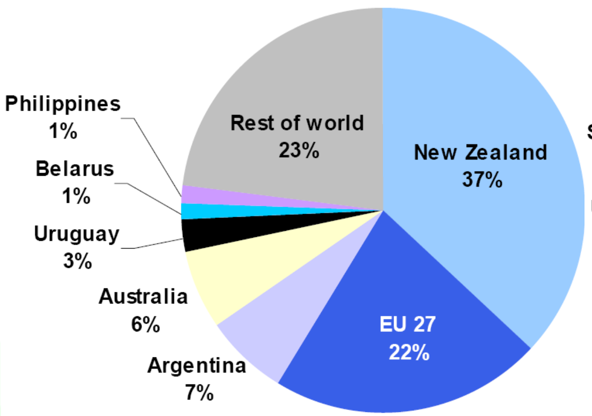
Cheese: 2009, total volume: 1.85 mln tons



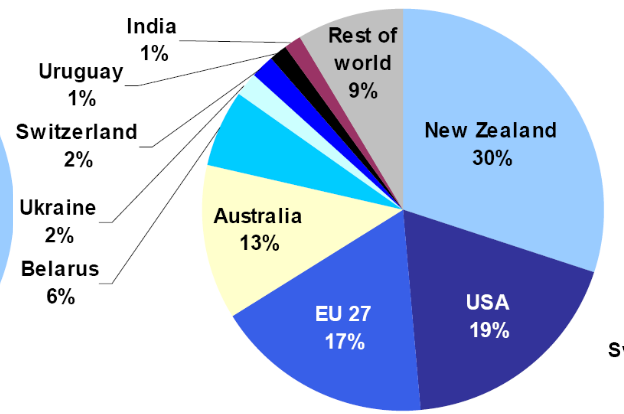
Butter, and butteroil: 2009, total volume: 0.91 mln tons



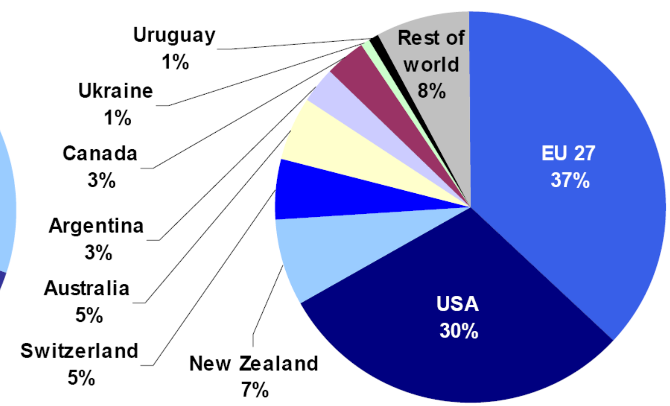
WMP: 2009, total volume: 2.13 mln tons



SMP: 2009, total volume: 1.33 mln tons

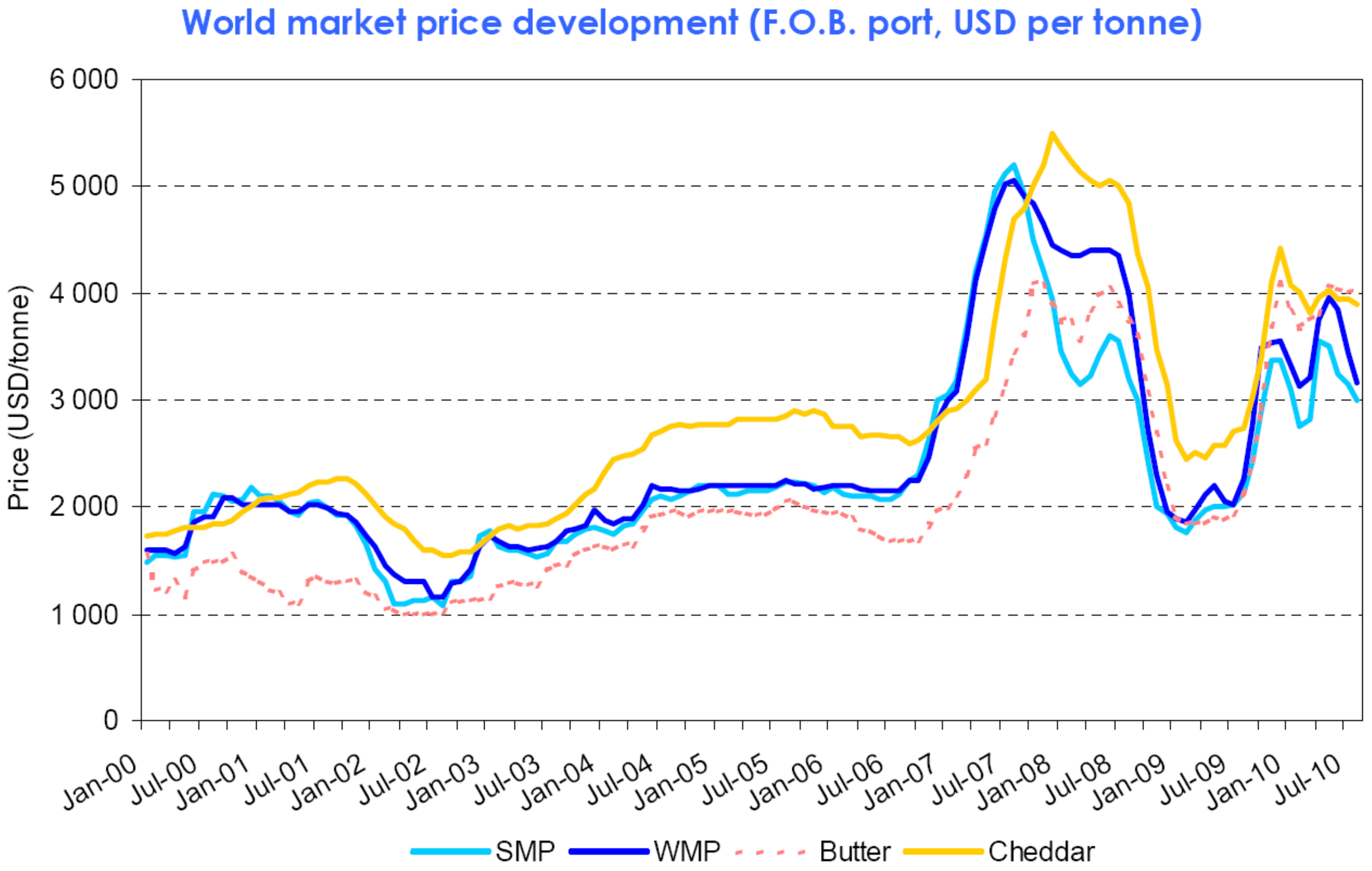


Whey/-products: 2009, total volume: 1.21 mln tons



Prices: world market prices

Development 2009: low first six months, recovery second six months.



Dairy processing industry

Main dairy leaders in 2009.

> 20		10 to 20		6 to 10		4 to 6		3 to 4	
Nestlé	27.3	Danone	16.0	Dean Foods	9.7	Saputo	5.2	Mengniu	3.8
		Lactalis	11.8	Fonterra	9.6	Meiji Dairies	5.1	Yili	3.6
		FrieslandCampina	11.4	Arla Foods	8.7	Parmalat	5.1	Sodiaal	3.5
				DFA	8.1	Morinaga	4.8	Land O' Lakes	3.2
				Kraft Foods	6.8	Bongrain	4.6	Bel	3.1
						Lala	4 to 5	Tine	3.0
								Schreiber	3 to 4

NB: Unilever not ranked

(dairy turnover in billion USD)

The World Dairy Situation 2010

IDF World Dairy Summit 2010 New Zealand

NEW ZEALAND

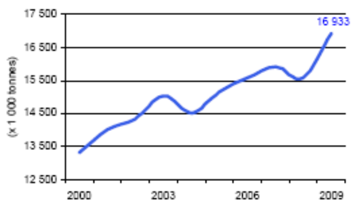
Dairy farming

Cow milk production (x 1 000 tonnes)	16 955
% of worldwide milk production	2.9%
% cow milk deliveries	100%
Number of dairy cows (x 1 000 head)	4 597

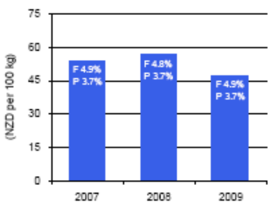
Main processors

Fonterra	www.fonterra.com
Open Country Dairy	www.opencountry.co.nz
Westland Milk Products	www.westland.co.nz
Tatua	www.tatua.com
Synlait Milk	www.synlait.co.nz

Cow milk deliveries (A)



Cow milk prices (F = fat%, P = protein%)



(A) The years 2000-2006 refer to the dairy seasons 2000/01 till 2006/07.

Processing and trade

Volume (x 1 000 tonnes)	Production 2009	Production Index (2008=100)	Import 2009	Import Index (2008=100)	Export 2009	Export Index (2008=100)
Liquid milk (B)	362	101	7	98	156	110
Butter and butteroil	470	109	1	133	451	138
Cheese (C)	270	92	6	138	290	117
WMP	790	121	0	36	811	137
SMP	360	136	4	450	408	169

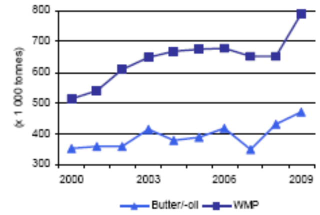
(B) Fermented milk products, cream and concentrated milk (fluid) included. (C) Processed cheese included.

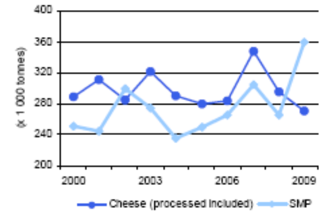
Consumption (kg per capita)

Milk (D): 77.6 kg Butter: 3.7 kg Cheese: 6.0 kg Population: 4.3 mln.

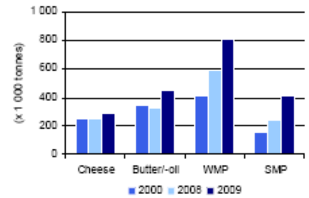
(D) Fermented milk products and milk drinks included.

Production

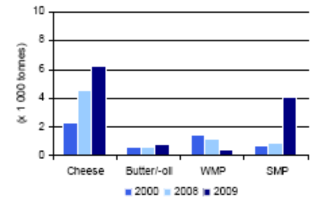




Export



Import



Key developments

Milk Production
New Zealand is experiencing a poor end to the 2009/10 season due to drought, with lower than average rainfall in most key dairy regions. The upper and central North Island, which account for approximately 40% of milk production, have been hit hardest by the dry weather.

Competition
The competition for New Zealand milk continues to increase. There are now six significant dairy exporting companies and investment proposals for at least five more. Fonterra' share of New Zealand milk collection has dropped from 96% in 2001 to approximately 90% in the 2009/10 season.

Raw Milk Regulations
The New Zealand Government has confirmed changes to the Dairy Industry Restructuring Act (DIRA). DIRA sets the basis for the price of milk other processors can access from Fonterra, with the new basis set at Fonterra's Milk Price plus 10 cents/kg MS.

Sustainability
From 1 July 2010 the energy sector joins New Zealand's Emissions Trading Scheme (ETS). The ETS introduces a price on greenhouse gas emissions to provide an incentive to reduce those emissions. The costs associated with the energy sector joining the scheme are of particular concern to farmers, as price increases for electricity and fuel are anticipated. The agriculture sector will be required to report their greenhouse gas emissions from 1 January 2012 and is expected to be a full participant in the scheme from 1 January 2015.

Price Volatility
Significant price volatility for dairy is still expected in the short term at least, driven by global supply/demand imbalances. Demand growth in Asia continues, while dairy production in several key markets, including New Zealand, has been adversely impacted by climactic conditions.

Source: DairyNZ (www.dairynz.co.nz), Fonterra, LIC statistics, national statistics.

Entwicklungen 2010

- Weltmilcherzeugung wieder stärker gestiegen - trotz widriger Witterung in verschiedenen Regionen
- Steigerung des Verbrauchs und des internationalen Handels
- Deutliche Zunahme der Nachfrage am internationalen Markt, insbesondere aus China und Russland
- Abbau von Beständen
- Globale kräftige Preiserholung nach der Krise in 2009

ZMB Dairy World

Vielen Dank für Ihre Aufmerksamkeit!

Monika Wohlfarth, Geschäftsführerin

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