World Butter and Cheese

Total world butter production increases 29.3% over the baseline, with India accounting for about 90% of the growth. India, one of the biggest milk producers in the world, continues to expand its milk production, with a 1.4% annual growth in cow milk production and a 3.1% annual growth in buffalo milk production. Buffalo milk is more valued because of its high fat content. Driven by rapidly growing domestic demand and strong world prices, Indian butter production increases 58.5%. Butter exports reach a record at the midterm of the baseline and then decrease as more production is absorbed by domestic markets. New Zealand, the EU, and Australia remain the world’s largest butter exporters, supplying 90% of total butter trade at the end of the baseline. As New Zealand and Australian butter exports rise, EU net exports languish.

Russia, a leading importer in the world butter market, gradually increases its butter imports as well as its domestic production. Because the growth in consumption outpaces the growth in production, Russian butter imports increase throughout the baseline. Driven by economic growth and westernized diets, consumption grows steadily in Asia, especially in China.

Total world cheese production grows 18.2%, with the U.S. and the EU accounting for about 52.4%. Strong demand drives a 24.8% increase in world cheese trade over the decade. EU cheese exports decline because of strong domestic demand. Australia and New Zealand’s combined cheese market share increases by 6.6% and reaches 49.2% at the end of the baseline. Argentina and Ukraine become increasingly important players in international cheese markets, together accounting for 9.1% of total exports by 2018.

Because of higher returns from cheese production and restricted milk supply, more milk is diverted from butter and NFD into cheese production in the EU. Cheese production rises 12.2% over the baseline, while butter and NFD production decrease. Australian and New Zealand cheese production increase 3.5% and 2.9% annually, respectively. Both Argentine and Brazilian cheese production increase 4.1% annually, respectively.

Russia and Japan are the leading cheese importers and account for 42.9% of total world imports on average. Sustained by economic and population growth, cheese imports of other Asian countries (China, Indonesia, Malaysia, Philippines, South Korea, Thailand, and Vietnam) increase by 2.6% annually. Mexican cheese imports rise 38.3% over the baseline.
### Butter Trade

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* Total net exports are the sum of all positive net exports and negative net imports.
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### Price

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* Total net exports are the sum of all positive net exports and negative net imports.
World Milk Powder

Over the next decade, world NFD and WMP production increase 16.1% and 21.2%, respectively. Milk powder production increases in most countries except the EU. Stimulated by strong import demand, especially from Asia, Australian and New Zealand NFD and WMP production increase steadily in the next decade. Total NFD and WMP volumes in the two countries increase 33.3% and 20.2%, respectively. As a by-product, India’s NFD production grows 48%, creating excess supplies that allow Indian NFD exports to rise.

Argentina’s dairy sector expands over the baseline. Its NFD and WMP production increase 7.7% and 3.7% annually, respectively. Rising production facilitates an increase in Argentine dairy exports. Improved domestic economic conditions and favorable government policies boost Brazilian dairy production. NFD and WMP production increase 93.2% and 40.5%, respectively, during the projection period, which enables Brazil to become a rising exporter in the world markets.

Australia, New Zealand, the EU, and the U.S. together captured about 88.3% of the NFD export market in 2008. Their combined market share stays at around 82% over the baseline, as there is a slight increase in NFD exports from other countries, including Argentina and Brazil. Asian countries, Algeria, and Mexico are major importers and increase their NFD imports over the projection period.

WMP trade grows 23.4% over the baseline. While EU WMP exports decrease by 14.3%, Australia, New Zealand, and Argentina expand their exports by 77.7%, 14.2%, and 46.8%, respectively. These three countries account for over 60% of total WMP exports by the end of baseline. Major importers Algeria, Saudi Arabia, and Malaysia steadily expand their WMP imports, accounting for over a quarter of world WMP imports.

Southeast Asia (Indonesia, Malaysia, Philippines, Thailand, and Vietnam) maintains strong NFD imports, accounting for 36% of the world total. China and Japan together account for about 9% of the NFD import market by the end of the baseline. Southeast Asian WMP imports rise 4% annually throughout the baseline and account for about 20% of world imports by 2018. Chinese WMP exports are negatively affected by the milk scandal for the next couple of years. Over the long run, as domestic WMP production expands and as consumers substitute more fluid milk for reconstituted milk powder, Chinese WMP exports increase slightly.
### Nonfat Dry Milk Trade

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**Price**

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*Total net exports are the sum of all positive net exports and negative net imports.*
### Whole Milk Powder Trade

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| **Net Importers** |      |      |      |      |      |      |      |      |      |      |      |
| Algeria         | 179  | 182  | 187  | 191  | 195  | 200  | 205  | 209  | 214  | 219  | 224  |
| Brazil          | -55  | -95  | -95  | -104 | -119 | -131 | -141 | -152 | -161 | -167 | -171 |
| China           | -18  | -10  | -17  | -31  | -42  | -45  | -49  | -56  | -64  | -70  | -77  |
| Egypt           | 38   | 42   | 43   | 45   | 46   | 48   | 50   | 52   | 53   | 55   | 57   |
| Indonesia       | 44   | 37   | 40   | 41   | 44   | 45   | 46   | 48   | 50   | 51   | 53   |
| Malaysia        | 97   | 101  | 104  | 106  | 109  | 113  | 115  | 118  | 121  | 124  | 126  |
| Mexico          | 8    | 11   | 16   | 20   | 20   | 18   | 18   | 19   | 19   | 23   | 27   |
| Peru            | 13   | 16   | 17   | 16   | 17   | 18   | 18   | 19   | 19   | 20   | 21   |
| Philippines     | 14   | 15   | 17   | 18   | 19   | 21   | 22   | 24   | 26   | 28   | 31   |
| Russia          | 30   | 32   | 32   | 26   | 22   | 22   | 20   | 18   | 17   | 16   | 15   |
| Saudi Arabia    | 95   | 108  | 113  | 114  | 118  | 121  | 124  | 126  | 128  | 131  | 135  |
| South Korea     | 1    | 3    | 4    | 4    | 4    | 4    | 4    | 4    | 4    | 4    | 4    |
| Thailand        | 39   | 42   | 42   | 43   | 45   | 46   | 48   | 49   | 50   | 52   | 53   |
| Venezuela       | 93   | 95   | 93   | 92   | 93   | 92   | 92   | 92   | 92   | 91   | 91   |
| Vietnam         | 40   | 44   | 48   | 51   | 56   | 60   | 65   | 70   | 75   | 80   | 85   |
| Rest of World   | 746  | 745  | 750  | 766  | 783  | 788  | 801  | 821  | 838  | 843  | 840  |
| **Total Net Imports** | 1,438 | 1,472 | 1,505 | 1,533 | 1,571 | 1,596 | 1,630 | 1,672 | 1,712 | 1,745 | 1,774 |

|                |      |      |      |      |      |      |      |      |      |      |      |
| **Price**      |      |      |      |      |      |      |      |      |      |      |      |
| Oceania Export Price | 3,913 | 1,973 | 1,857 | 2,029 | 2,154 | 2,205 | 2,277 | 2,363 | 2,443 | 2,504 | 2,547 |
| FOB Price N. Europe | 3,999 | 2,101 | 1,988 | 2,184 | 2,225 | 2,283 | 2,365 | 2,462 | 2,553 | 2,621 | 2,671 |

* Total net exports are the sum of all positive net exports and negative net imports.
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## Argentine Dairy Supply and Utilization

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## Brazilian Dairy Supply and Utilization

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<td>72.94</td>
<td>74.50</td>
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<td>77.79</td>
<td>79.48</td>
<td>81.24</td>
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<tr>
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<td>78.00</td>
<td>79.48</td>
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## Chinese Dairy Supply and Utilization

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<td>56,177</td>
<td>58,049</td>
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### Butter
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  - 2010: 107
  - 2011: 108
  - 2012: 111
  - 2013: 113
  - 2014: 116
  - 2015: 118
  - 2016: 120
  - 2017: 123
  - 2018: 125

### Cheese
- **Production**
  - 2008: 248
  - 2009: 262
  - 2010: 271
  - 2011: 279
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- **Beginning Stocks**
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- **Domestic Supply**
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  - 2010: 271
  - 2011: 279
  - 2012: 285
  - 2013: 290
  - 2014: 296
  - 2015: 305
  - 2016: 309
  - 2017: 313
  - 2018: 317

### Nonfat Dry Milk
- **Production**
  - 2008: 56
  - 2009: 67
  - 2010: 73
  - 2011: 76
  - 2012: 80
  - 2013: 84
  - 2014: 88
  - 2015: 92
  - 2016: 96
  - 2017: 101
  - 2018: 105
- **Beginning Stocks**
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  - 2011: 0
  - 2012: 0
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- **Domestic Supply**
  - 2008: 56
  - 2009: 67
  - 2010: 73
  - 2011: 76
  - 2012: 80
  - 2013: 84
  - 2014: 88
  - 2015: 92
  - 2016: 96
  - 2017: 101
  - 2018: 105

### Whole Milk Powder
- **Production**
  - 2008: 1,198
  - 2009: 1,215
  - 2010: 1,258
  - 2011: 1,304
  - 2012: 1,355
  - 2013: 1,394
  - 2014: 1,438
  - 2015: 1,492
  - 2016: 1,536
  - 2017: 1,575
  - 2018: 1,613
- **Beginning Stocks**
  - 2008: 0
  - 2009: 0
  - 2010: 0
  - 2011: 0
  - 2012: 0
  - 2013: 0
  - 2014: 0
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  - 2016: 0
  - 2017: 0
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- **Domestic Supply**
  - 2008: 1,198
  - 2009: 1,215
  - 2010: 1,258
  - 2011: 1,304
  - 2012: 1,355
  - 2013: 1,394
  - 2014: 1,438
  - 2015: 1,492
  - 2016: 1,536
  - 2017: 1,575
  - 2018: 1,613

### Net Trade
- **Butter**
  - 2008: -36
  - 2009: -37
  - 2010: -42
  - 2011: -45
  - 2012: -48
  - 2013: -51
  - 2014: -53
  - 2015: -55
  - 2016: -57
  - 2017: -60
  - 2018: -61
- **Cheese**
  - 2008: -46
  - 2009: -49
  - 2010: -51
  - 2011: -50
  - 2012: -54
  - 2013: -59
  - 2014: -63
  - 2015: -67
  - 2016: -76
  - 2017: -80
  - 2018: -84
- **Nonfat Dry Milk**
  - 2008: -40
  - 2009: -43
  - 2010: -46
  - 2011: -51
  - 2012: -52
  - 2013: -57
  - 2014: -61
  - 2015: -65
  - 2016: -69
  - 2017: -74
  - 2018: -79
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  - 2008: 18
  - 2009: 10
  - 2010: 17
  - 2011: 31
  - 2012: 42
  - 2013: 45
  - 2014: 49
  - 2015: 56
  - 2016: 64
  - 2017: 70
  - 2018: 77
## Colombian Dairy Supply and Utilization

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## Egyptian Dairy Supply and Utilization

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### European Union Dairy Supply and Utilization

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#### Butter
- **Production**
- **Beginning Stocks**
- **Domestic Supply**
- **Consumption**
- **Ending Stocks**
- **Domestic Use**
- **Net Trade**

#### Cheese
- **Production**
- **Beginning Stocks**
- **Domestic Supply**
- **Consumption**
- **Ending Stocks**
- **Domestic Use**
- **Net Trade**

#### Nonfat Dry Milk
- **Production**
- **Beginning Stocks**
- **Domestic Supply**
- **Consumption**
- **Ending Stocks**
- **Domestic Use**
- **Net Trade**

#### Whole Milk Powder
- **Production**
- **Beginning Stocks**
- **Domestic Supply**
- **Consumption**
- **Ending Stocks**
- **Domestic Use**
- **Net Trade**

#### Prices
- **Milk Target**
- **Milk Producer**
- **Butter Domestic**
- **Cheese Domestic**
- **NFD Domestic**
- **WMP Domestic**
- **Butter Intervention**
- **NFD Intervention**
## Indian Dairy Supply and Utilization

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### Whole Milk Powder

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## Saudi Arabian Dairy Supply and Utilization

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  - 4
  - 4
  - 4
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  - 6
  - 6
  - 6

- **Beginning Stocks**
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  - 0
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  - 0

- **Domestic Supply**
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  - 5
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  - 4
  - 4
  - 4
  - 5
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  - 6
  - 6

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  - 52
  - 54
  - 56
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  - 59
  - 61
  - 63
  - 65

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- **Domestic Use**
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  - 54
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  - 58
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  - 63
  - 65

- **Net Trade**
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  - -56
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  - -58

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- **Beginning Stocks**
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- **Domestic Supply**
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  - 93
  - 96
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  - 101

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- **Domestic Use**
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  - 80
  - 85
  - 85
  - 87
  - 89
  - 92
  - 93
  - 96
  - 98
  - 101

- **Net Trade**
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- **Domestic Use**
  - 23
  - 26
  - 29
  - 31
  - 33
  - 36
  - 39
  - 42
  - 44
  - 47
  - 50

- **Net Trade**
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### Whole Milk Powder
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- **Domestic Supply**
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- **Consumption**
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  - 114
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- **Domestic Use**
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  - 113
  - 114
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**Note:** All values are in thousands unless specified.
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### Ukrainian Dairy Supply and Utilization

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**Butter**

|                     |       |       |       |       |       |       |       |       |       |       |
| Production          | 89    | 93    | 94    | 96    | 100   | 103   | 106   | 110   | 114   | 118   | 122   |
| Beginning Stocks    | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     |
| Domestic Supply     | 89    | 93    | 94    | 96    | 100   | 103   | 106   | 110   | 114   | 118   | 122   |
| Consumption         | 82    | 70    | 72    | 77    | 83    | 84    | 86    | 88    | 89    | 89    | 89    |
| Ending Stocks       | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     |
| Domestic Use        | 82    | 70    | 72    | 77    | 83    | 84    | 86    | 88    | 89    | 89    | 89    |
| Net Trade           | 7     | 23    | 22    | 19    | 17    | 18    | 21    | 22    | 25    | 29    | 33    |

**Cheese**

|                     |       |       |       |       |       |       |       |       |       |       |
| Production          | 256   | 256   | 266   | 274   | 277   | 283   | 289   | 300   | 310   | 320   | 331   |
| Beginning Stocks    | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     |
| Domestic Supply     | 256   | 256   | 266   | 274   | 277   | 283   | 289   | 300   | 310   | 320   | 331   |
| Consumption         | 191   | 185   | 186   | 195   | 204   | 212   | 219   | 224   | 228   | 234   | 239   |
| Ending Stocks       | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     |
| Domestic Use        | 191   | 185   | 186   | 195   | 204   | 212   | 219   | 224   | 228   | 234   | 239   |
| Net Trade           | 65    | 71    | 80    | 79    | 73    | 70    | 69    | 76    | 82    | 87    | 92    |

**Nonfat Dry Milk**

|                     |       |       |       |       |       |       |       |       |       |       |
| Production          | 65    | 70    | 65    | 61    | 59    | 57    | 55    | 55    | 54    | 53    | 53    |
| Beginning Stocks    | 2     | 2     | 2     | 2     | 2     | 2     | 2     | 2     | 2     | 2     | 2     |
| Domestic Supply     | 67    | 72    | 67    | 63    | 61    | 59    | 57    | 57    | 56    | 55    | 55    |
| Consumption         | 25    | 12    | 12    | 14    | 16    | 17    | 18    | 18    | 18    | 18    | 18    |
| Ending Stocks       | 2     | 2     | 2     | 2     | 2     | 2     | 2     | 2     | 2     | 2     | 2     |
| Domestic Use        | 27    | 14    | 14    | 16    | 18    | 19    | 20    | 20    | 20    | 20    | 20    |
| Net Trade           | 40    | 58    | 53    | 47    | 43    | 40    | 37    | 37    | 36    | 36    | 35    |

**Whole Milk Powder**

|                     |       |       |       |       |       |       |       |       |       |       |
| Production          | 40    | 42    | 43    | 45    | 46    | 48    | 49    | 51    | 53    | 55    | 57    |
| Beginning Stocks    | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     |
| Domestic Supply     | 40    | 42    | 43    | 45    | 46    | 48    | 49    | 51    | 53    | 55    | 57    |
| Consumption         | 17    | 18    | 18    | 19    | 19    | 19    | 20    | 20    | 21    | 21    | 21    |
| Ending Stocks       | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     | 0     |
| Domestic Use        | 17    | 18    | 18    | 19    | 19    | 19    | 20    | 20    | 21    | 21    | 21    |
| Net Trade           | 23    | 25    | 26    | 26    | 27    | 28    | 29    | 31    | 32    | 34    | 35    |
## Uruguayan Dairy Supply and Utilization

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### Per Capita Dairy Consumption of Selected Countries (continued)

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*(Kilograms)*