



THE UNIVERSITY OF
MELBOURNE

The Global Dairy Industry

AEPS – DAIRY WEEK 2





In this section

You will learn about:

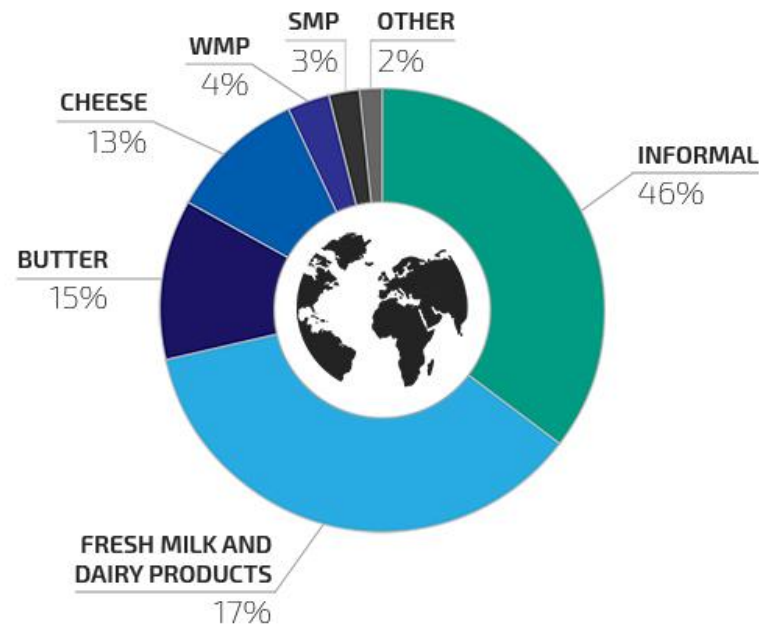
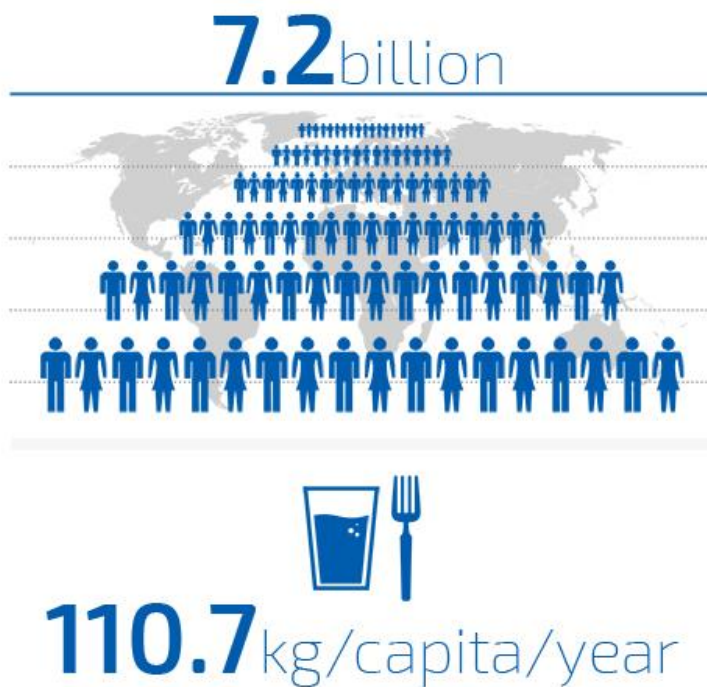
- Dairy production globally
- What type of dairy products predominate and where
- Australia on the global dairy scene
- How Australian dairy production compares to other international examples





WORLD DAIRY SITUATION

WORLD: CLASSIFICATION OF WORLD DAIRY CONSUMPTION 2015



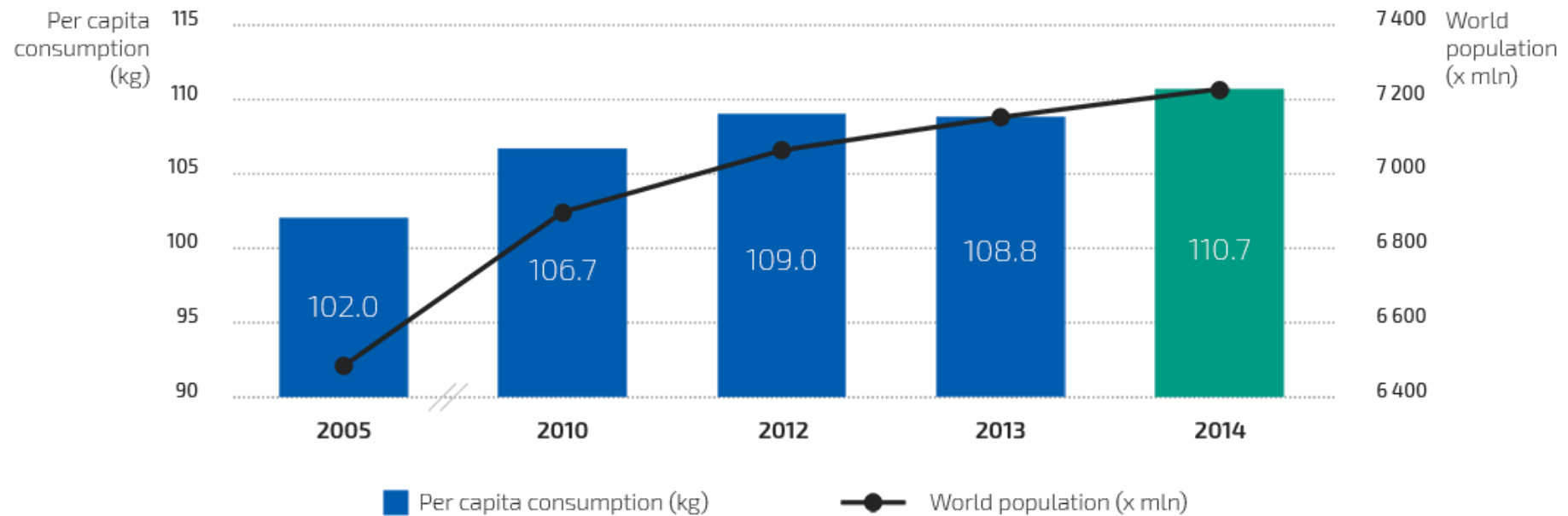
Source: Own calculations based on national statistics

Source: IDF, 2020



MILK CONSUMPTION

WORLD: PER CAPITA MILK CONSUMPTION AND POPULATION



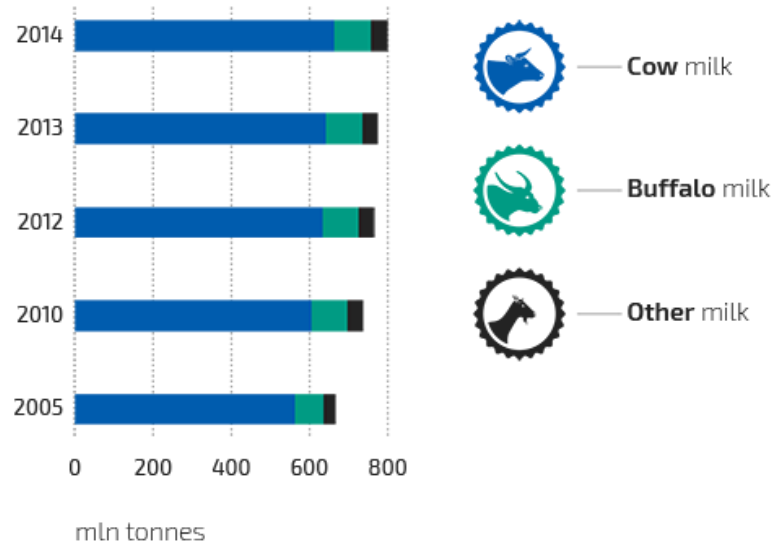
Source: CNIEL, ZuivelNL, FAO, IDF National Committees, national statistics

Source: IDF, 2020



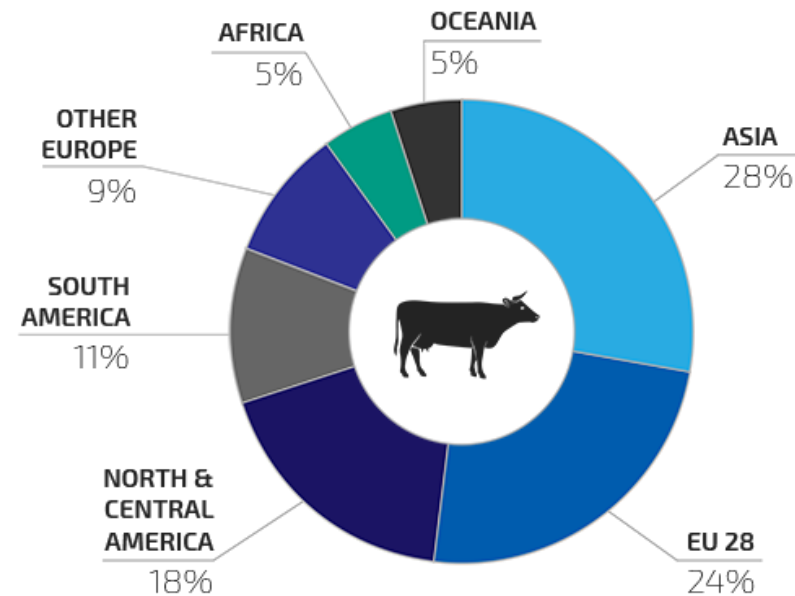
MILK PRODUCTION

**WORLD: MILK PRODUCTION
BY SPECIES**

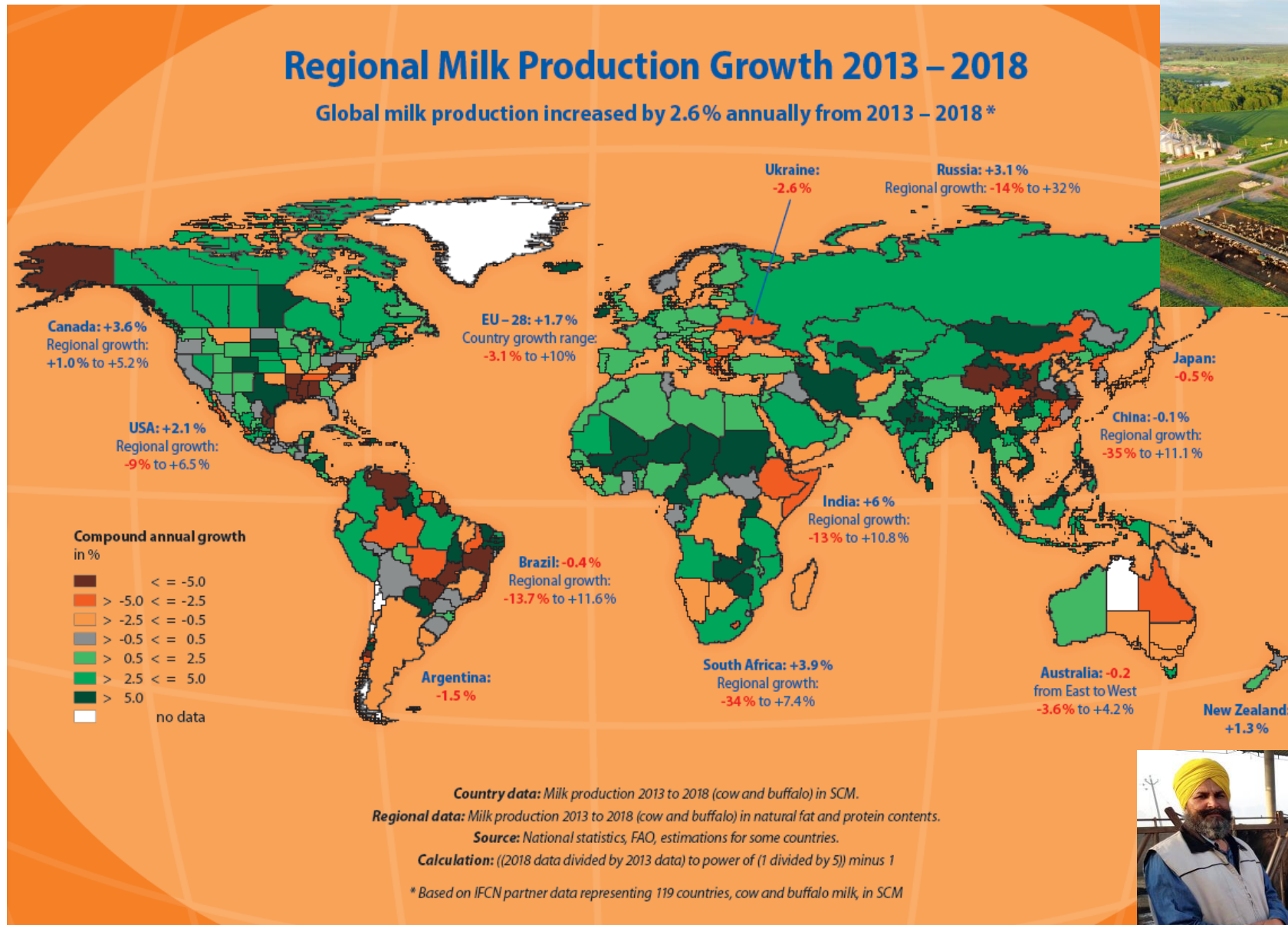


Source: CNIEL, ZuiveINL, FAO, IDF National Committees, national statistics

**WORLD: COW'S MILK PRODUCTION
(SHARE PER REGION)**



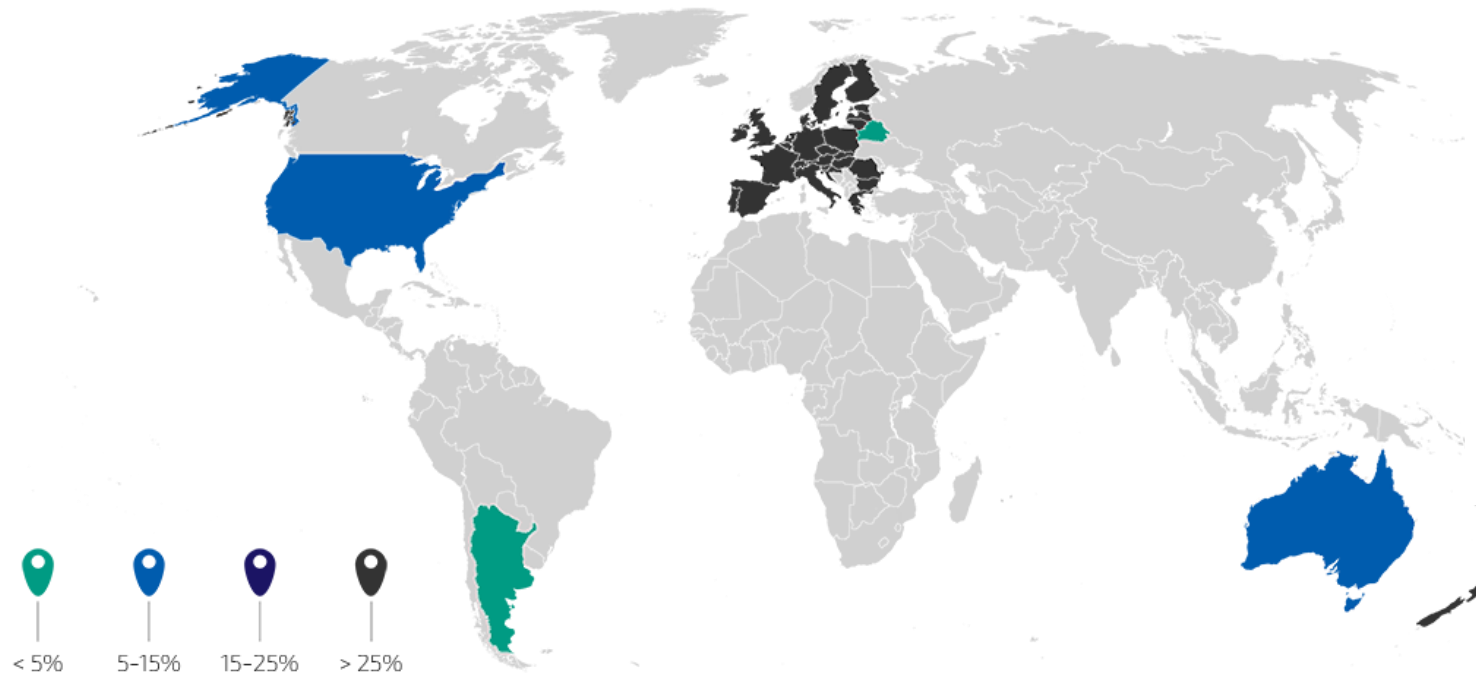
Source: IDF, 2020





WORLD DAIRY TRADE

WORLD TRADE: KEY EXPORTERS, EXPORT SHARE



Source: CNIEL, ZuivelNL, FAO, IDF National Committees, national statistics

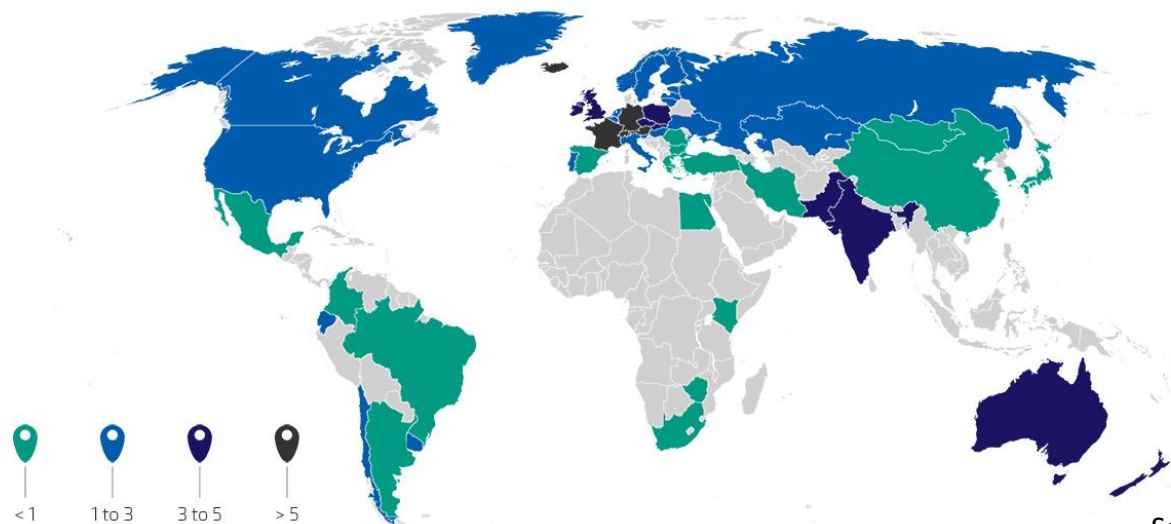
World total milk exports (thousand tonnes milk equivalents)			
	2018	2019	Change 2019 over 2018 (%)
World	75897	76 656	1.0
EU 28	20 438	22 071	8.0
New Zealand	18 680	20 337	8.9
United States	11 759	10 781	-8.3
Belarus	3 841	3 911	1.8
Australia	3 091	2 732	-11.6
Argentina	1 977	1 708	-13.6

Source: FAO. 2020. Dairy Market Review, March, 2020. FAO

Source: IDF, 2020

BUTTER

PER CAPITA: CONSUMPTION IN KG (2013)



Source: IDF, 2020

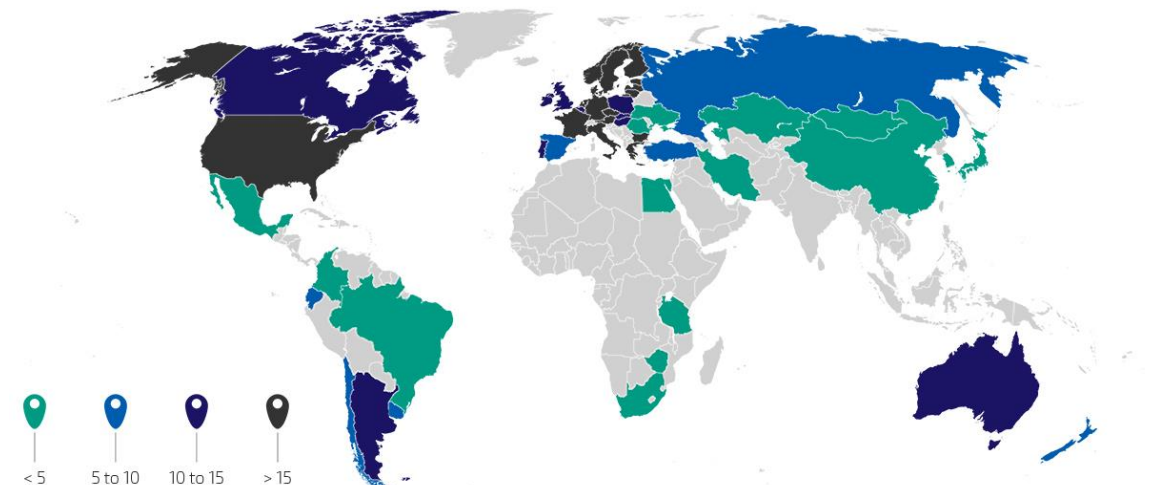
Source: National Committees of IDF, USDA, Eurostat

Butter exports (tonnes)			
	2018	2019	Change 2019 over 2018 (%)
World	921 314	963 877	4.6
New Zealand	456 407	464 942	1.9
EU 28	158 357	214 462	35.4
Belarus	89 383	78 227	-12.5
India	29 594	43 632	47.4
United States	51 719	32 735	-36.7
Ukraine	30 383	18 284	-39.8
Australia	16 296	17 469	7.2

Source: FAO. 2020. Dairy Market Review, March, 2020. FAO

CHEESE

PER CAPITA: CONSUMPTION IN KG (2013)

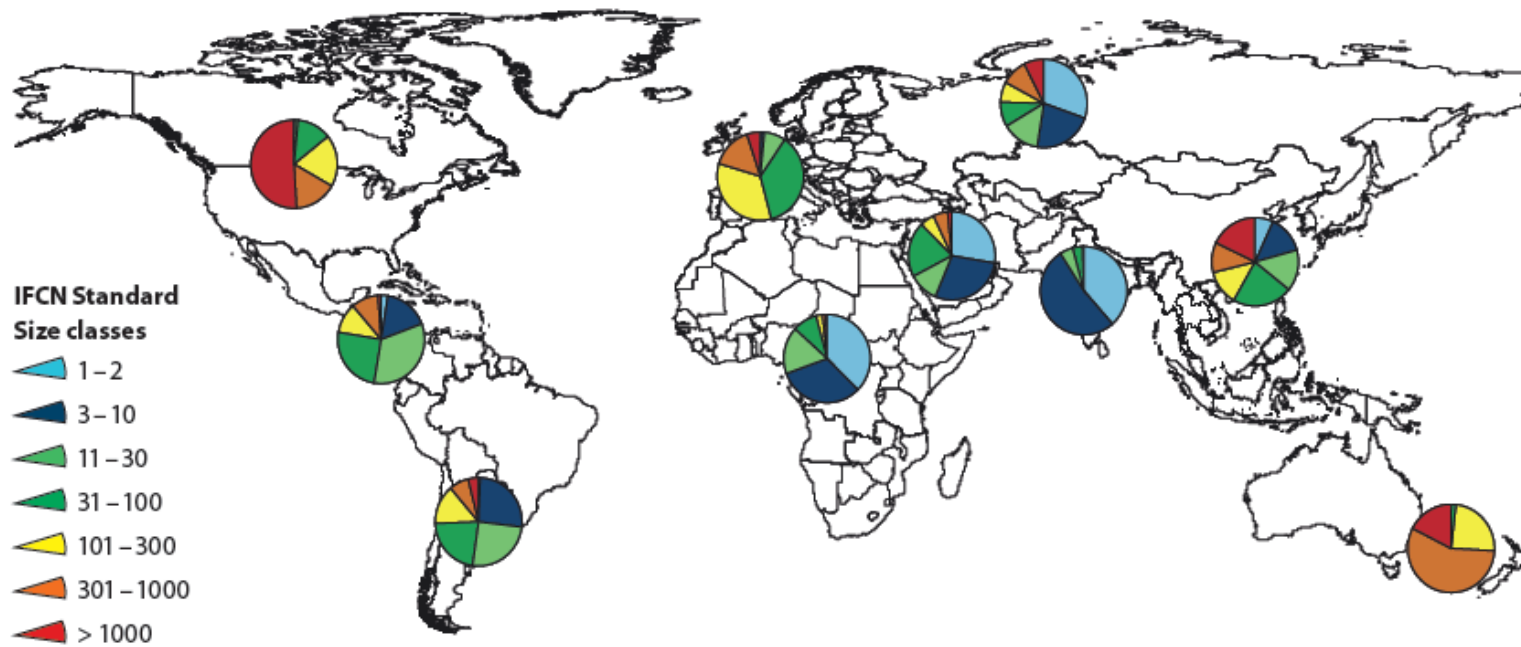


Source: National Committees of IDF, USDA, Eurostat

Cheese exports (tonnes)			
	2018	2019	Change 2019 over 2018 (%)
World	2 521 677	2 644 461	4.9
EU 28	832 480	879 792	5.7
United States	350 240	362 433	3.5
New Zealand	321 898	335 562	4.2
Belarus	211 166	243 728	15.4
Australia	172 012	159 970	-7.0
Saudi Arabia	77 737	81 401	4.7
Egypt	61 243	80 778	31.9

Global farm sizes

Farm Structure 2018



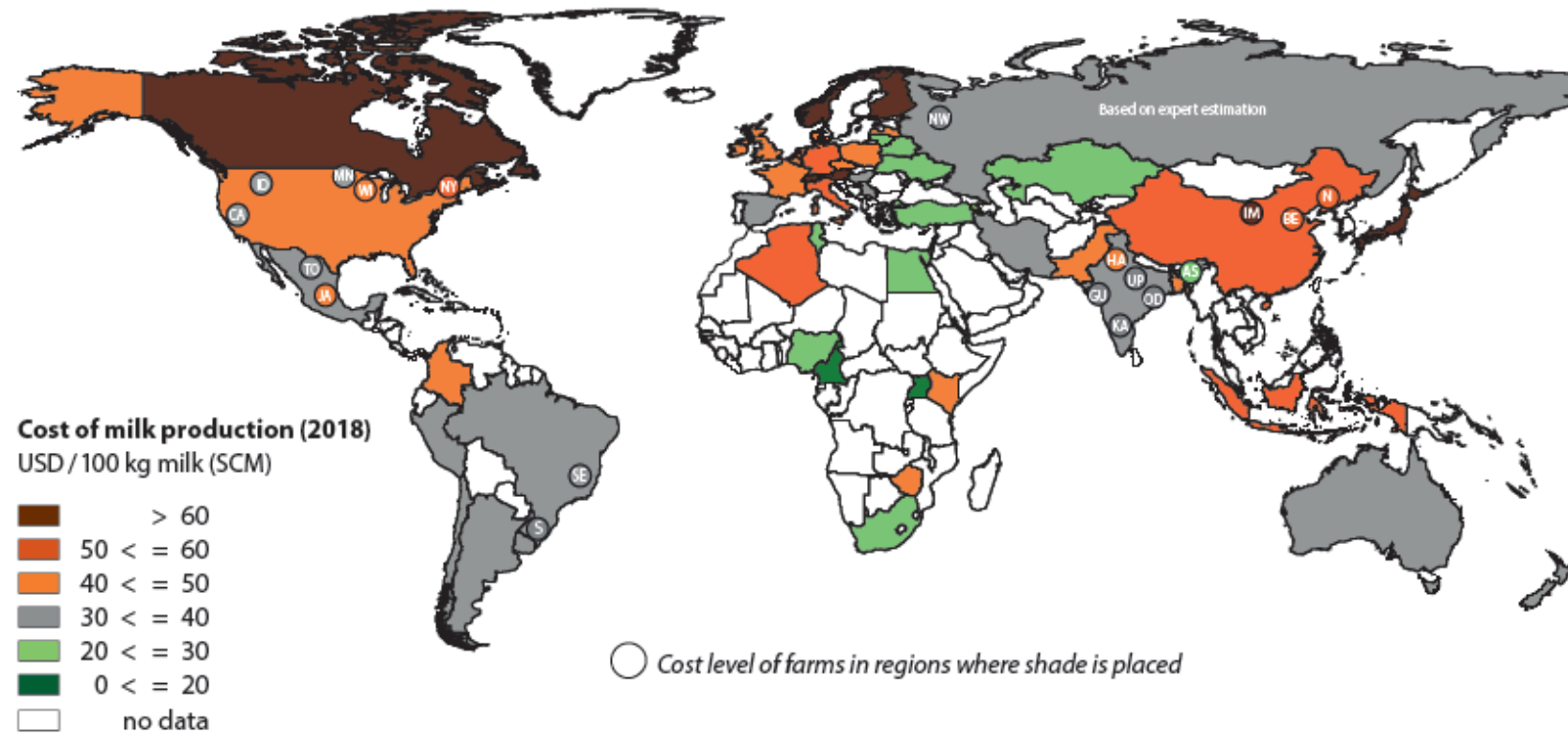
Data: Dairy cow numbers (cow, buffalo) in % per size class.

Source: IFCN Standard Class Data based on national statistics and estimations.

Method: Analysis based on 86 countries. Dairy cows in % per IFCN Standard Size Class, defined equal for all countries.
Data from the national statistics were allocated to the individual standard classes for cow and farm numbers.



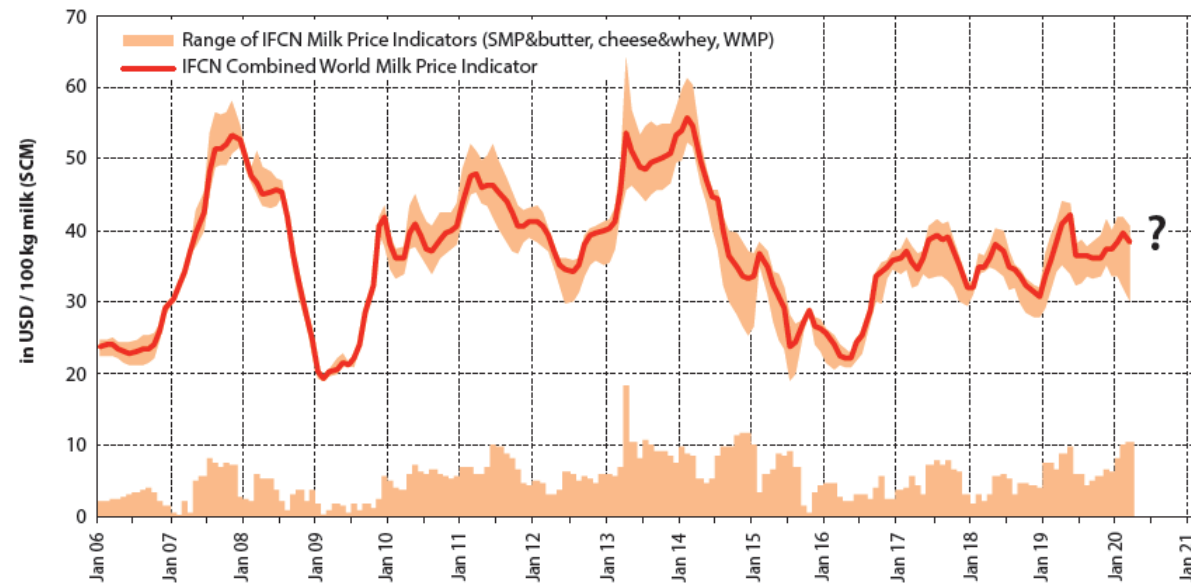
Cost of Milk Production on average sized Farms 2018



Indicator: Cost of milk production (excluding quota cost) of the „average sized“ typical farms analysed.

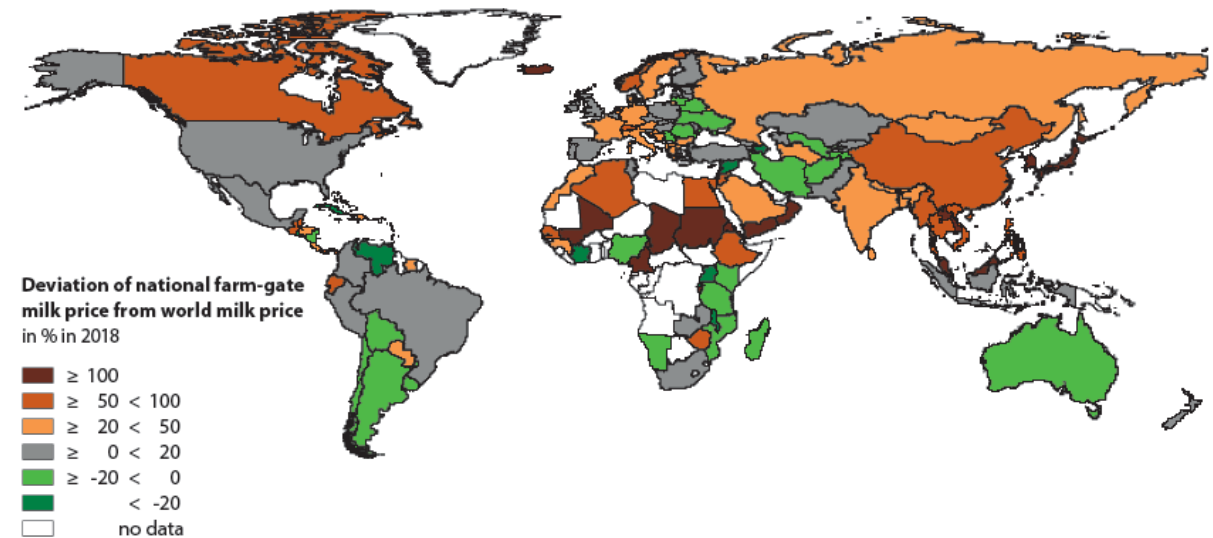
Milk prices

IFCN World Milk Price



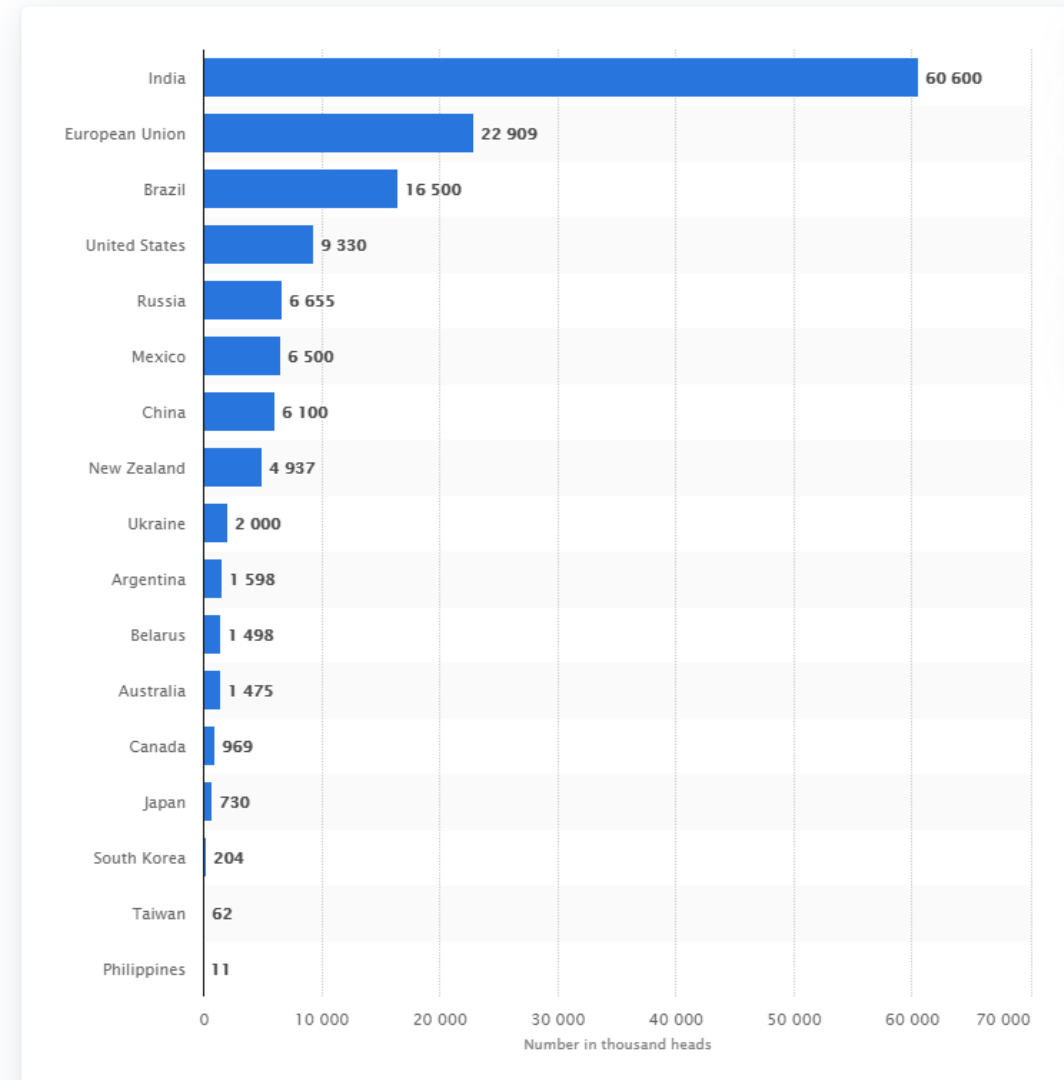
IFCN Combined World Milk Price Indicator: Weighted average of world milk price indicators of
1) SMP & butter, 2) cheese & whey 3) WMP based on quarterly updated shares. Data until February 2020.
For more details see <http://ifcdairy.org>

National Farm-gate Milk Price



Country data: National farm-gate milk prices 2018 in USD/100kg SCM, IFCN world milk price indicator in USD/100kg SCM.
Source: National statistics, FAO, Eurostat, estimations for some countries.
Calculation: National milk price 2018 divided by IFCN combined world milk price indicator 2018 minus 1.

Number of milk cows worldwide in 2019, by country *(in 1,000 heads)*



Milk production (volume)

Rank	Country	Production (Metric Tonnes)
1	United States	91.3
2	India	60.6
3	China	35.7
4	Brazil	34.3
5	Germany	31.1
6	Russia	30.3
7	France	23.7
8	New Zealand	18.9
9	Turkey	16.7
10	United Kingdom	13.9
Approx 194 th	Australia	9.5

MILK PRODUCTION PER COW (approx.)	
USA	10,000L/cow/yr (33L/d)
India	1,000L/cow/yr (3L/d)
China	2,500L/cow/yr (8L/d)
NZ	4,000L/cow/yr (13L/d)
Australia	6,167L/cow/yr (20L/d)





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