

Developments and Status of South American Dairy Markets

Kenny Siqueira

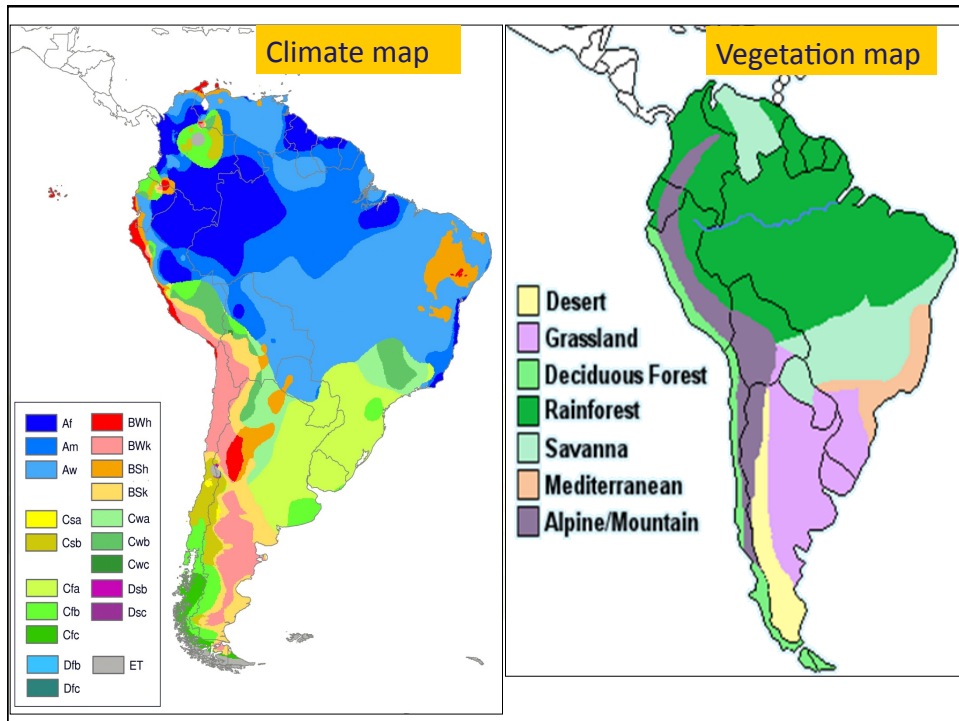
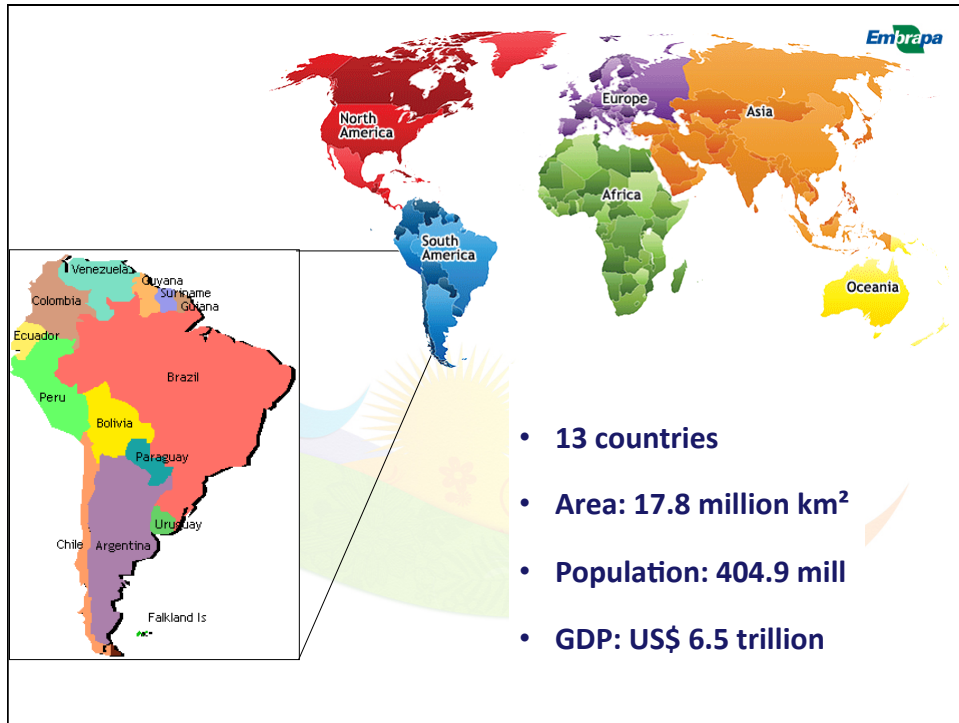


Dairy Cattle

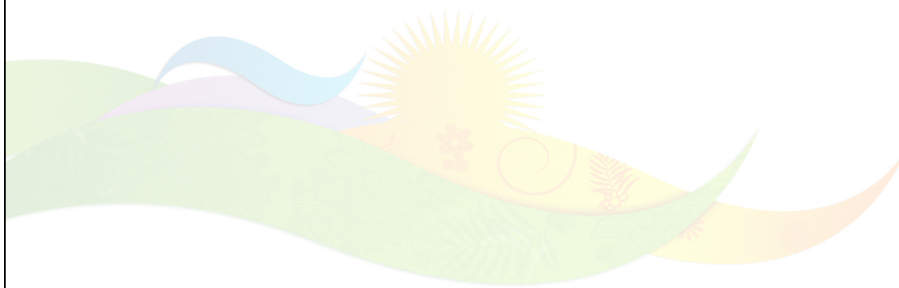


Understanding South America





South American Dairy Market



MILK PRODUCTION IN SOUTH AMERICA



- Production: 66.0 mill tons
- 11% of world production
- Growth 42% in 10 years

Source: FAO

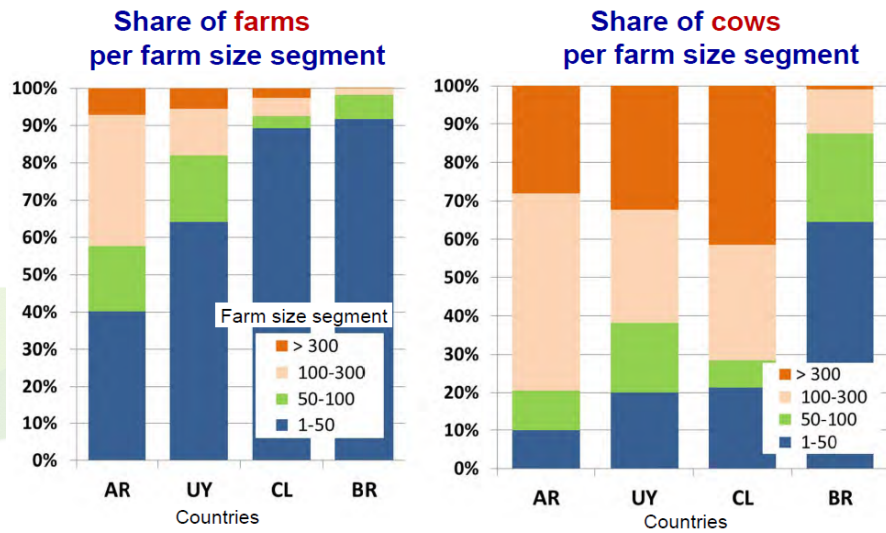
DAIRY FARMING



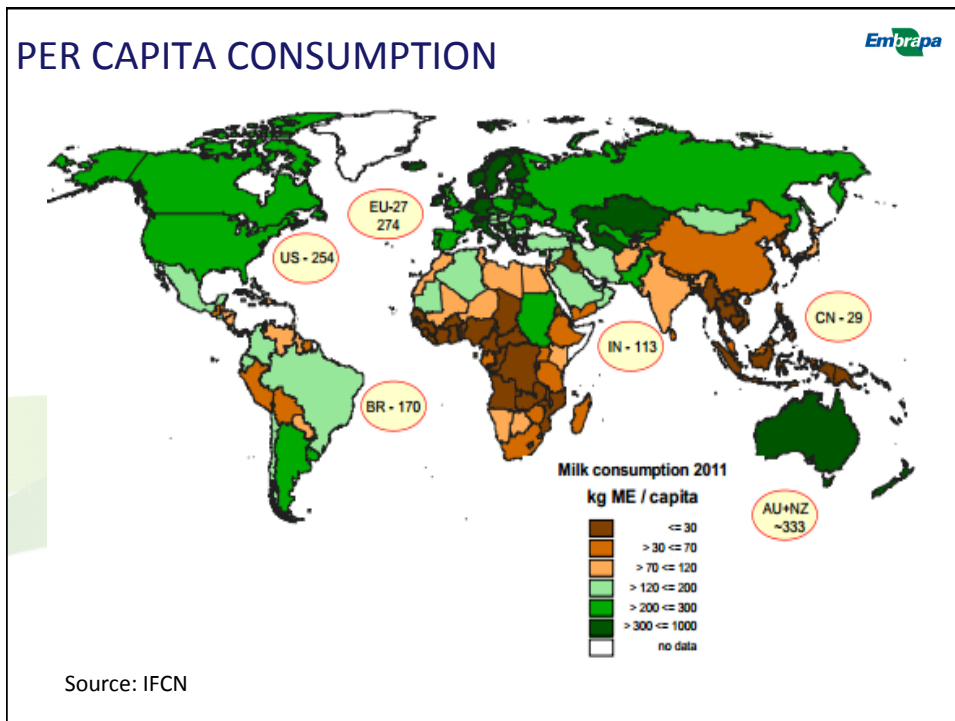
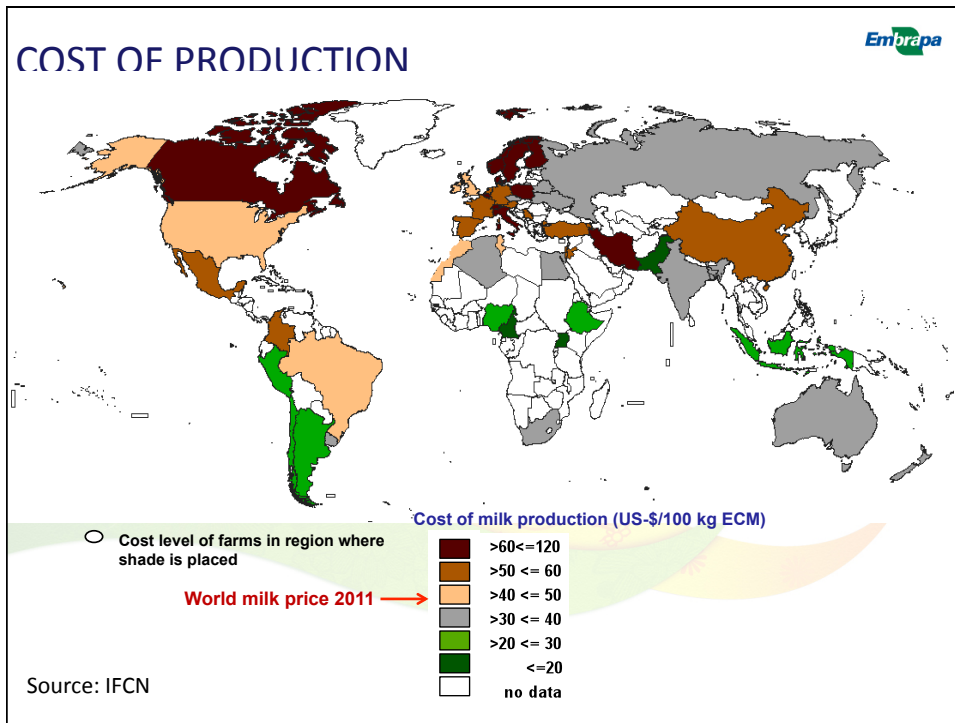
	Argentina	Uruguay	Chile	Brazil	Colombia	USA
Cows in mill heads	1.8	0.42	0.53	23	5.3	9.2
Milk yield in t/cow/year	5.8	4.2	4.9	1.4	1.4	9.8
Dairy farms in 1000	11	6	16	1,350	490	59,74
Farm size in cows/farm	157	71	33	21	15	154,6
Average production/farm in t/farm/year	954.7	303.5	163.8	28.5	15.3	1521,0

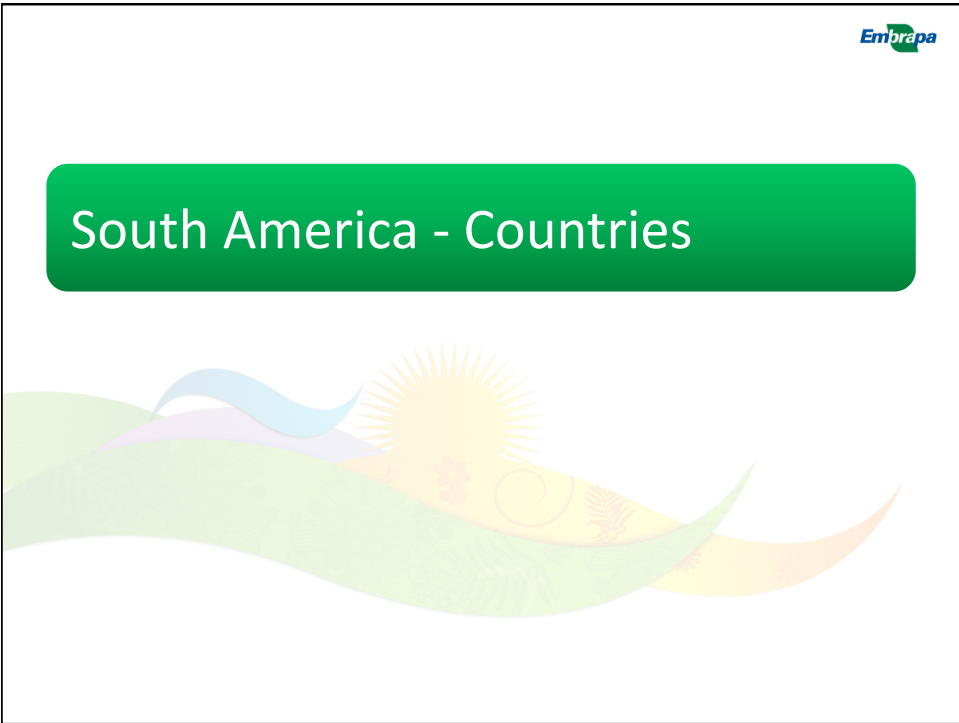
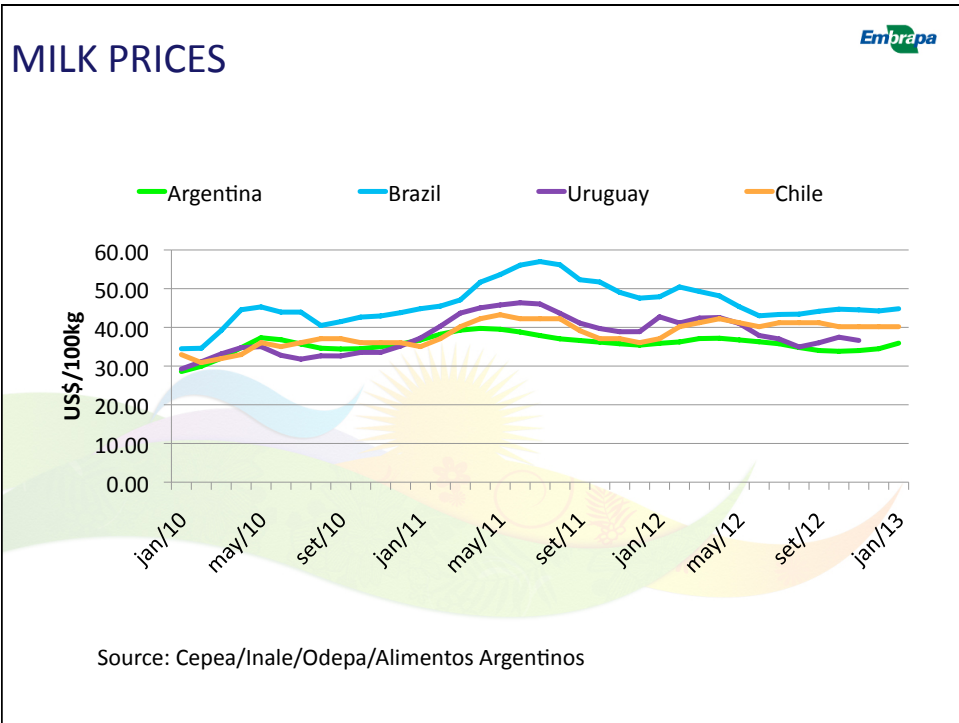
Source: FAO/IFCN


DAIRY FARMING




Source: IFCN



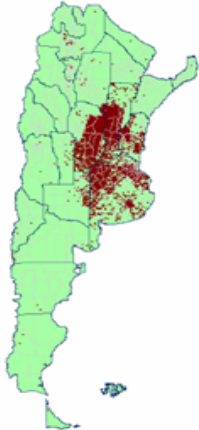






ARGENTINA




- 16th in world production ranking
- Pasture based system
- Natural good conditions for milk production (soil, climate, flat topography, genetic quality)
- 15 - 20% Exports ⇔ 25% in 2011





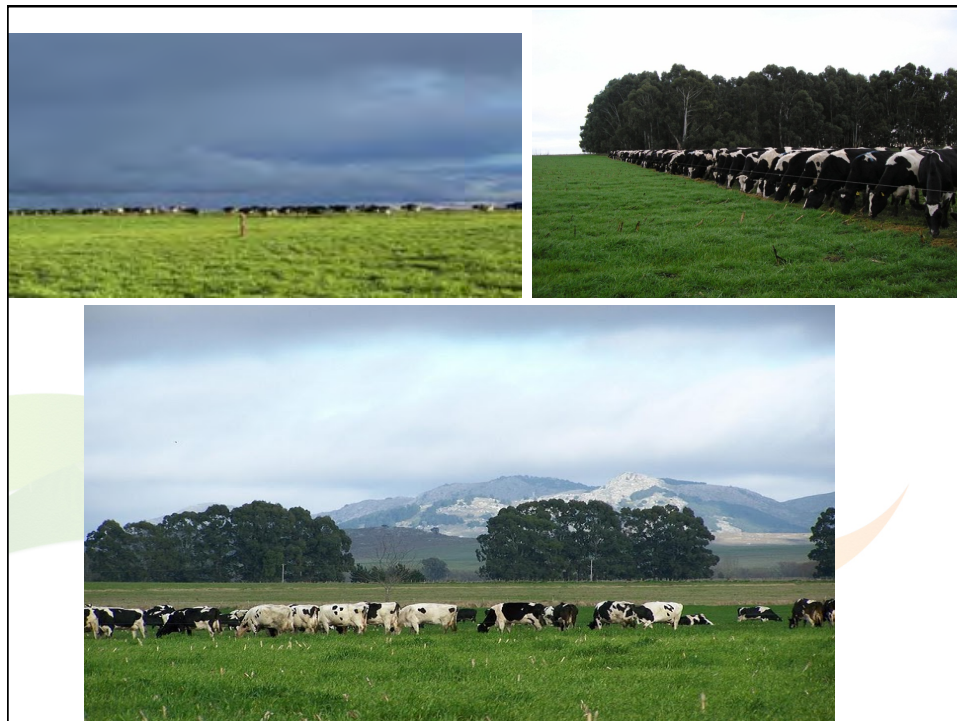
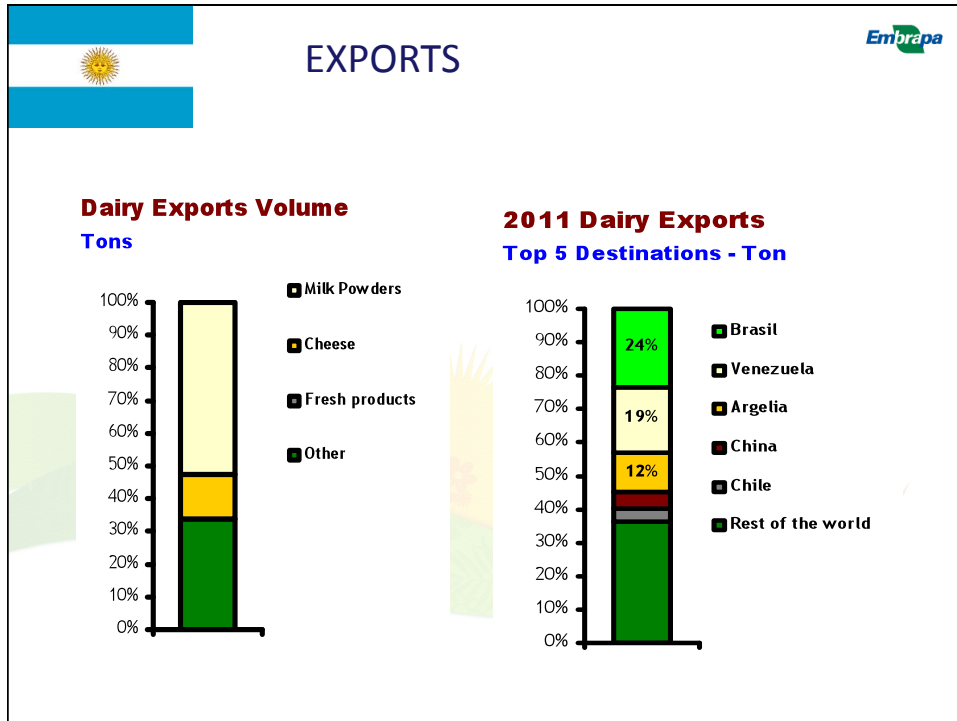


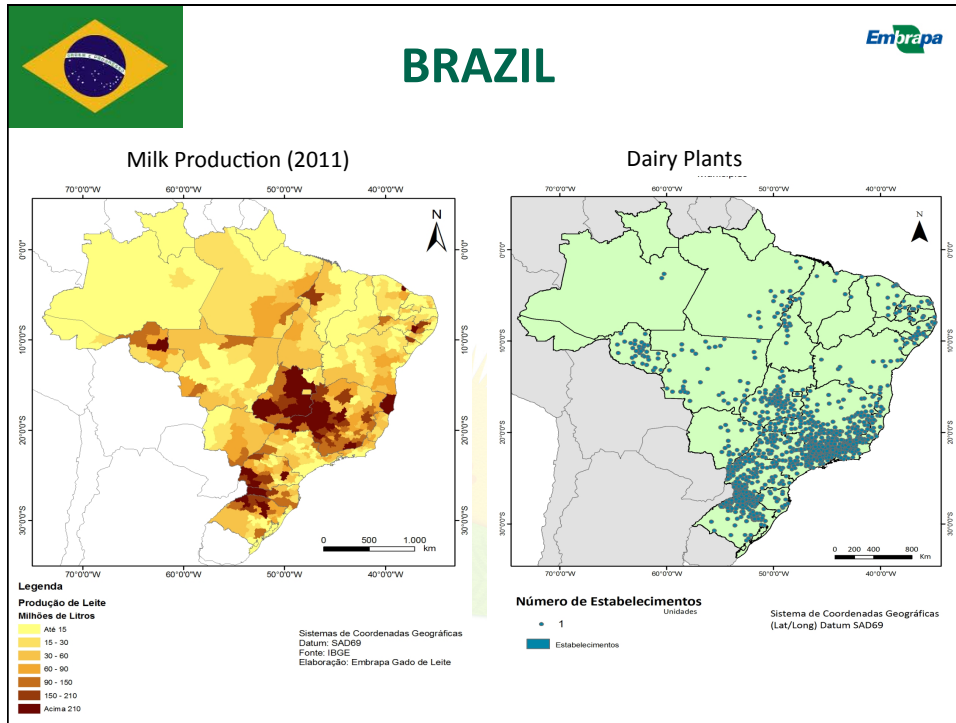
DAIRY PROCESSORS



	LARGE	MEDIUM-LARGE	SMALL-MEDIUM	SMALL
No. companies	10	25-30	50	700
Share of total milk	56%	15%	8%	21%
Market focus	Domestic & exports	Domestic, increasing exports	Domestic	Domestic
Range of products	Wide range of products	Products mix	Cheese & others	Cheese focus

– Production seasonality of 40%

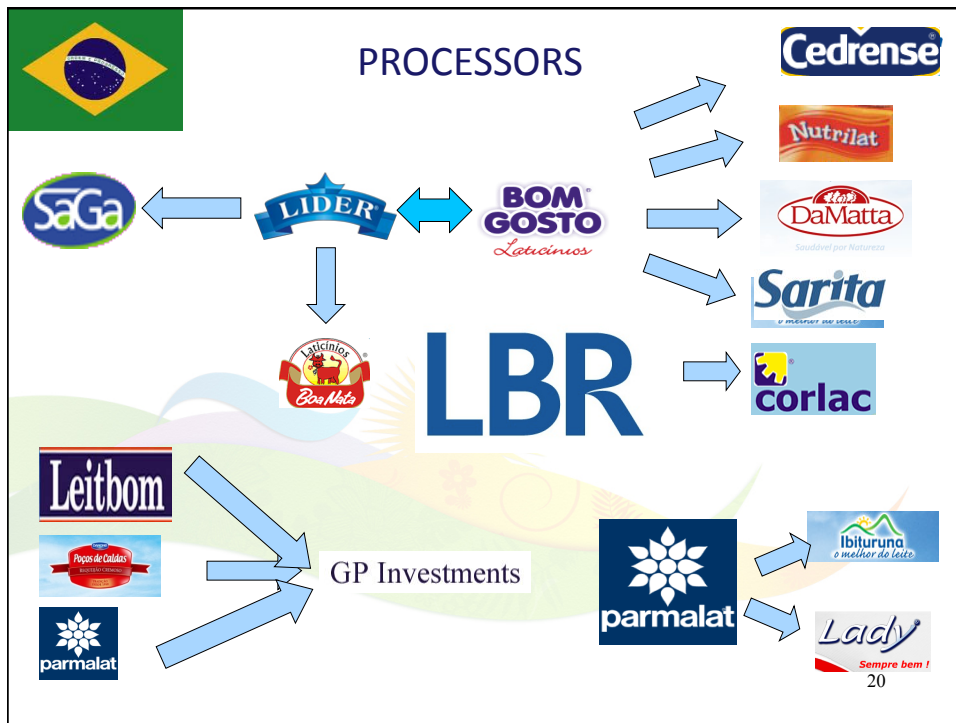
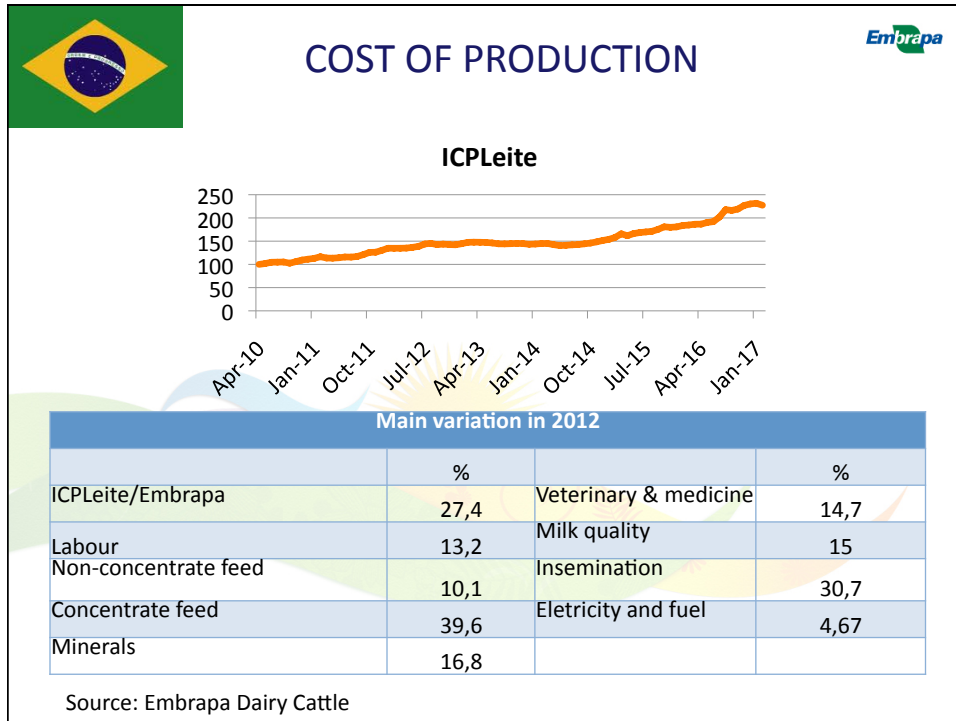


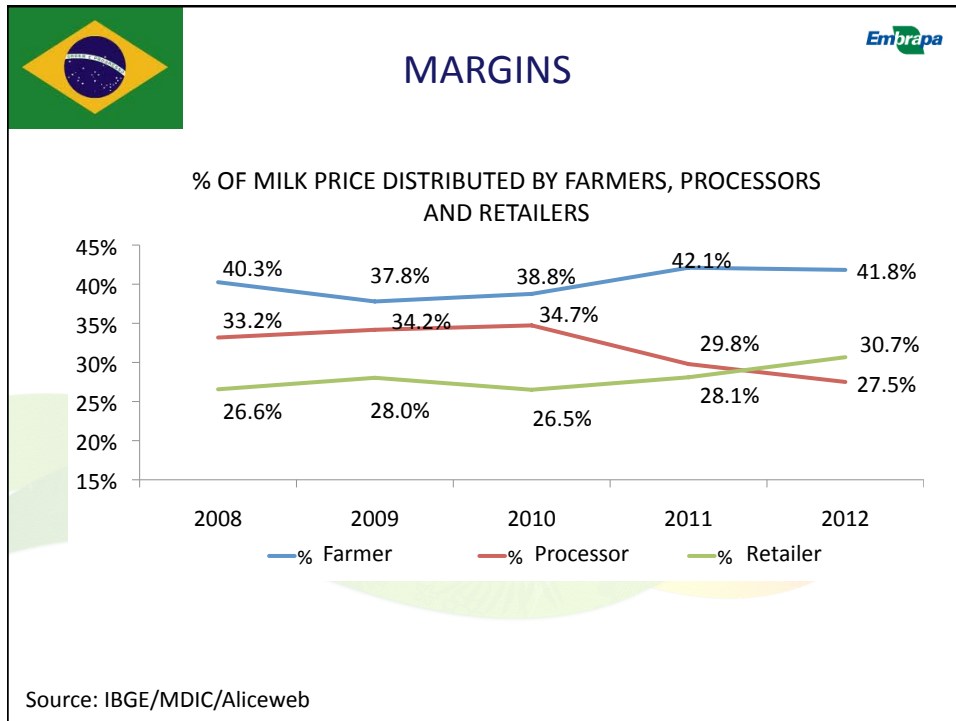
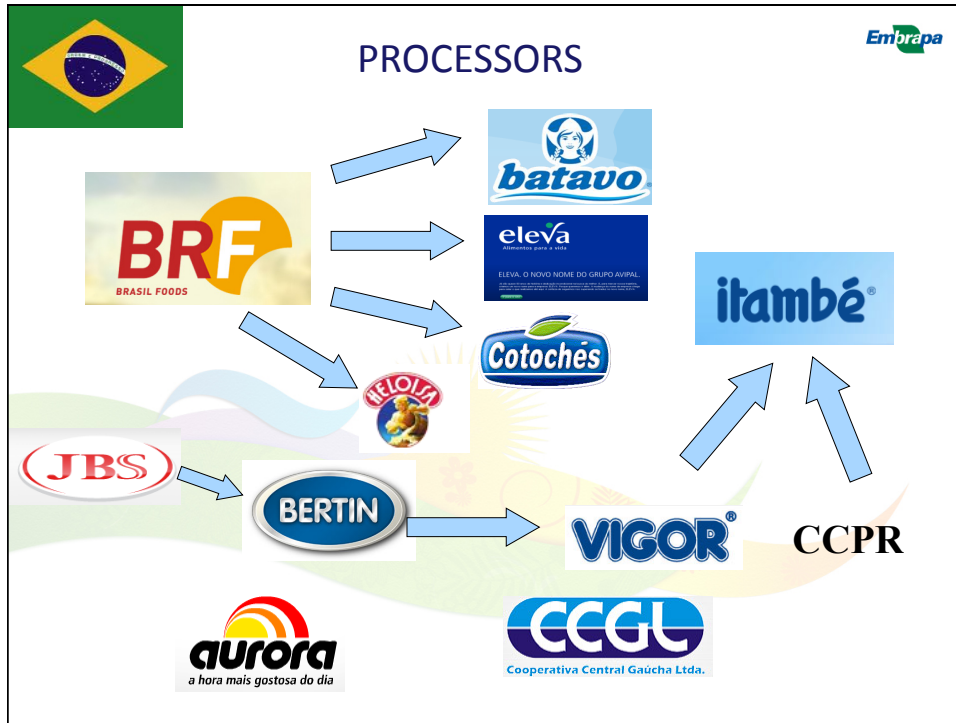


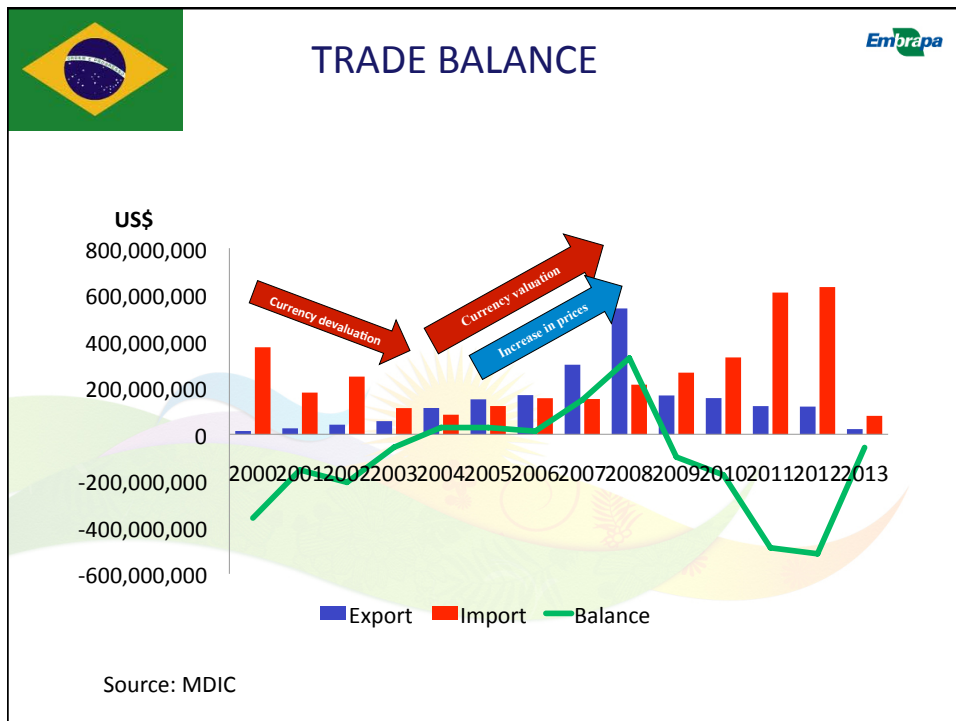
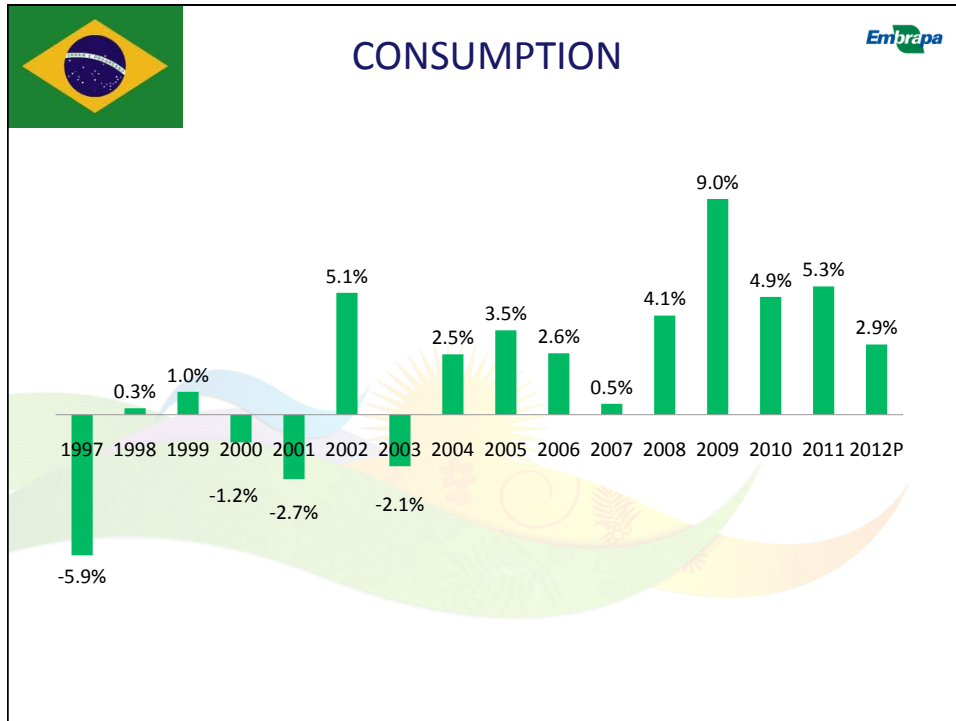
DAIRY FARMING


Production (liters/day)	Farms	% of farms	% of production
< 10	610,255	45.2	4.6
10 a 20	198,171	14.7	5.2
20 a 50	267,743	19.8	16.1
50 a 200	230,639	17.1	39.3
200 a 500	35,209	2.6	18.8
> 500	8,792	0.7	16.0
total	1,350,809	100.0	100.0

Source: IBGE











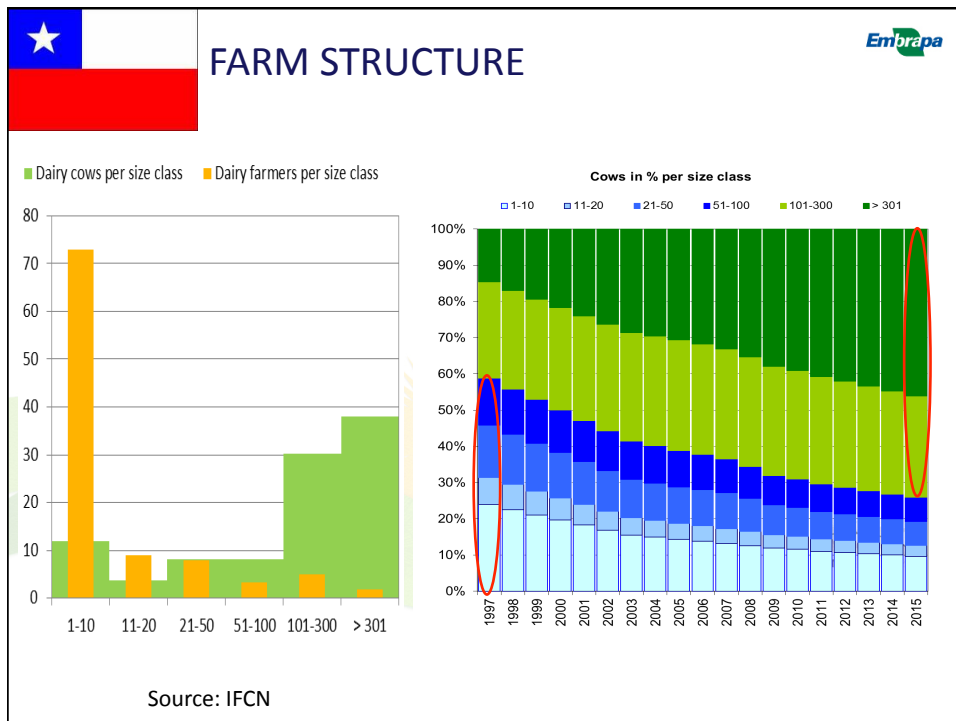
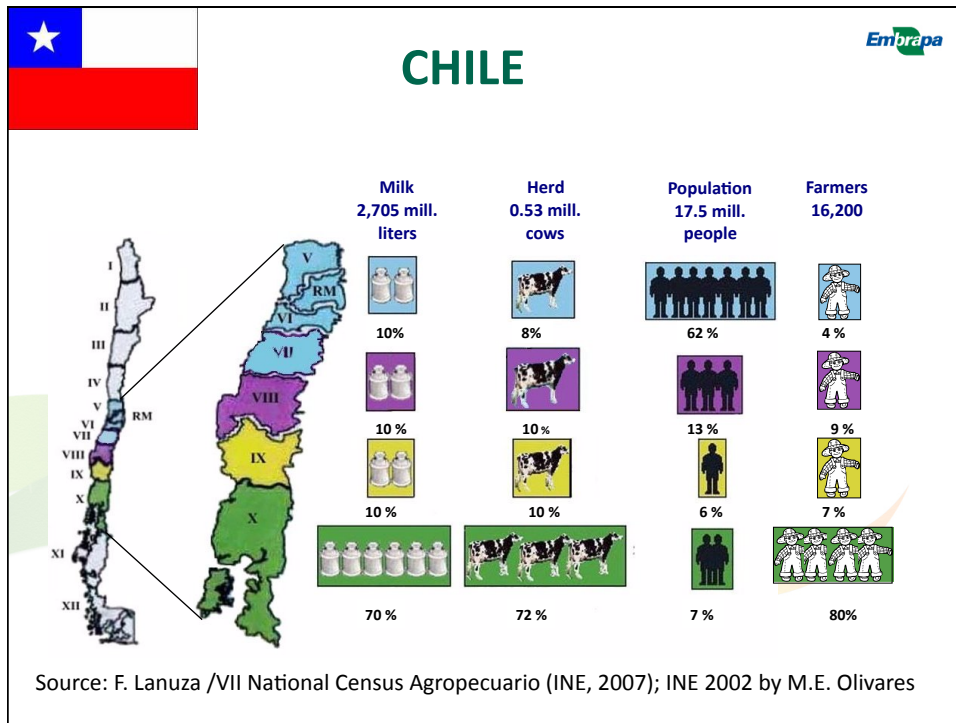
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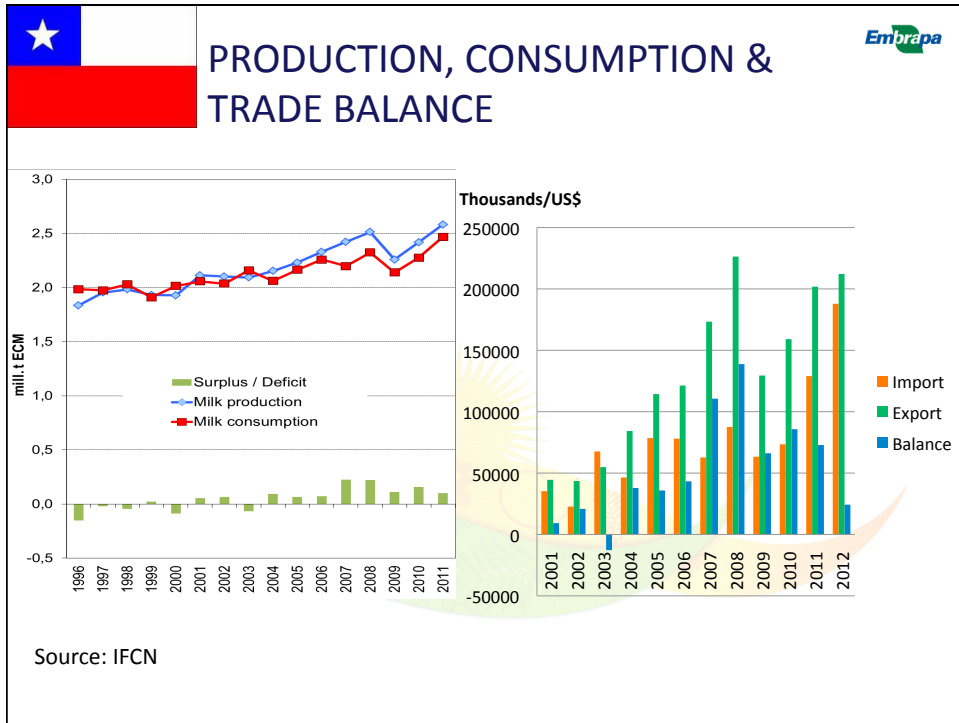
Embrapa

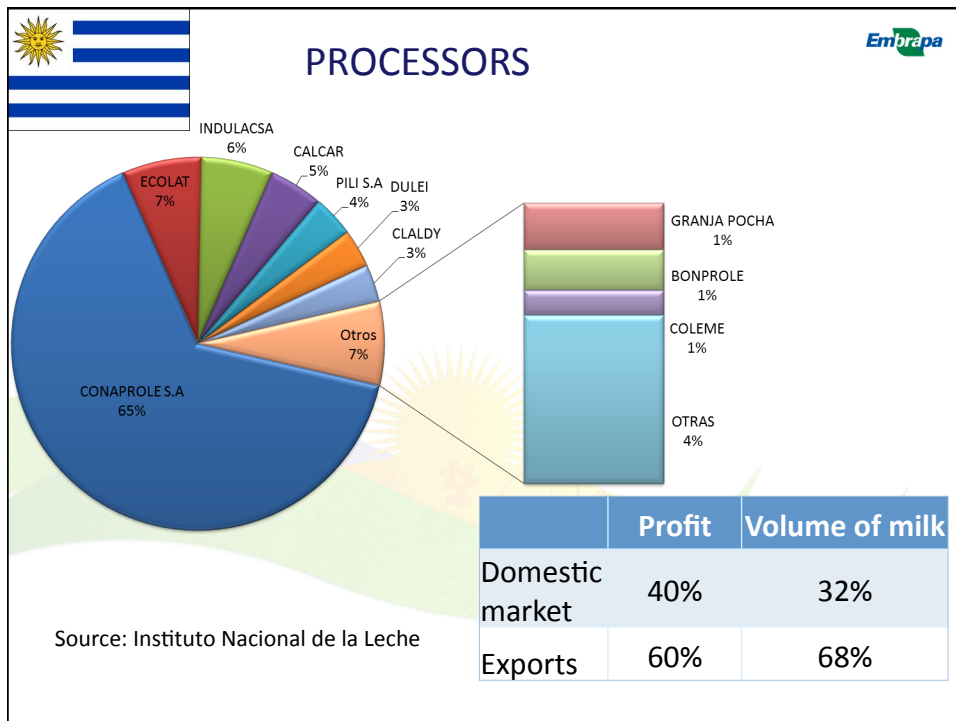
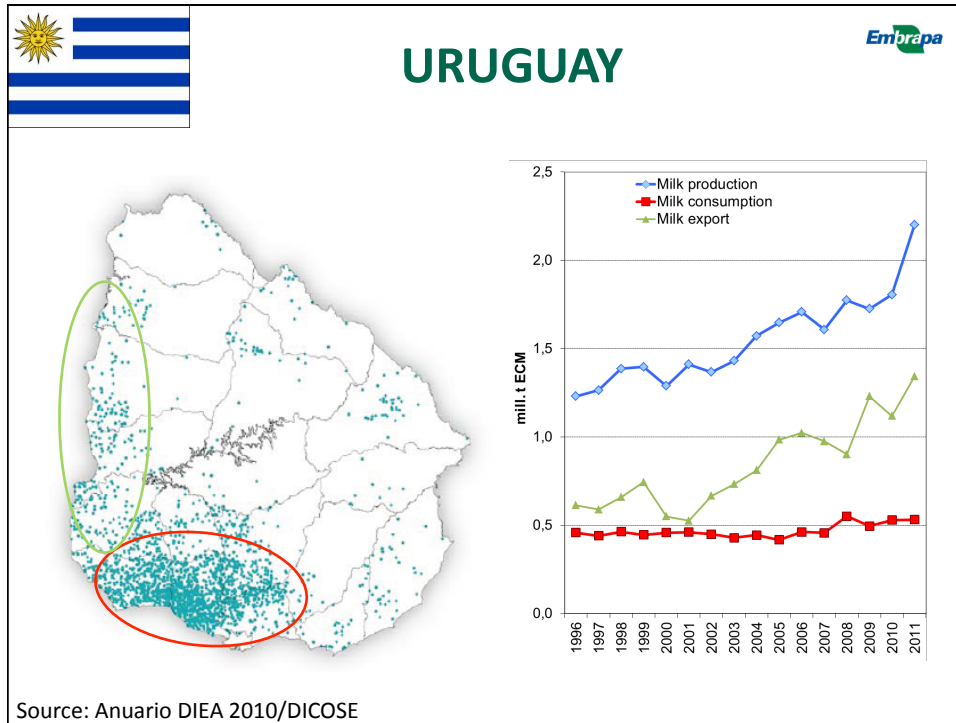


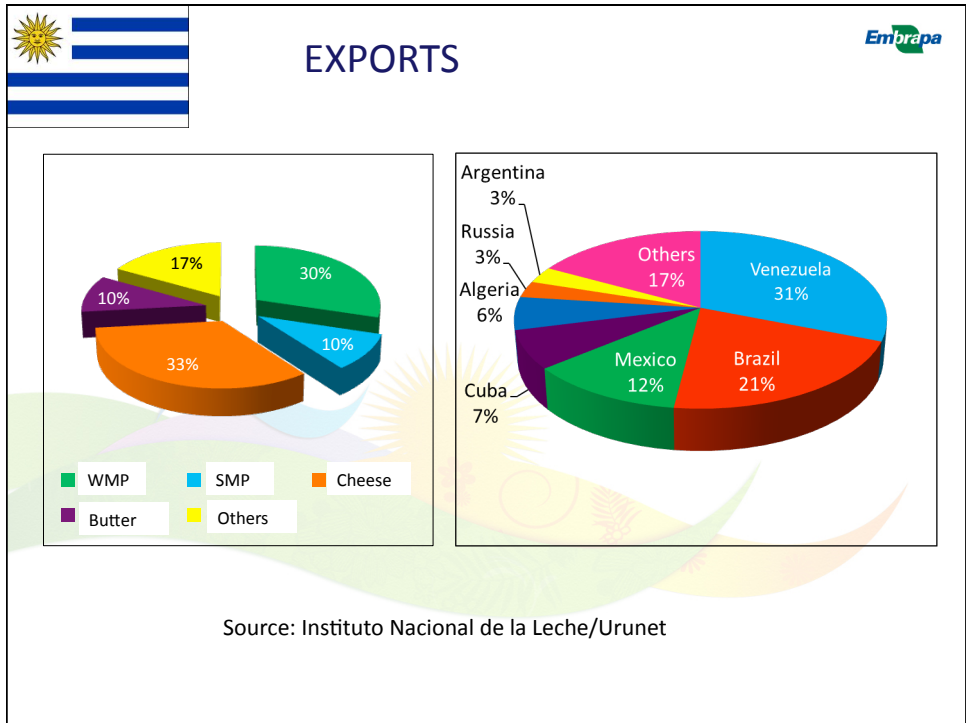
Source: Milkpoint













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Thank you !!!



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Ministry of
Agriculture, Livestock
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