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WORLD MILK PRODUCTION FALLING IN 1993

The decline in world milk production seen over the past three years is expected to continue in 1993, according to the latest projections by the US Department of Agriculture. Cow's milk production in 51 countries which account for about 80% of all milk production (including sheep's, goat's and buffalo milk), is projected at 408.2 million tonnes, down 1.7% on 1992. (text continues on M/.)

Cow's milk production in selected countries 1)

	1989	1990	1991	1992 2)	1993 3)	% change 1993:92
Canada	7 980	7 975	7 863	7 800	7 750	- 0.6
Mexico	8 970	9 330	10 200	10 700	11 000	+ 2.8
USA	65 424	67 276	67 370	68 800	68 900	+ 0.1
North America total	82 374	84 581	85 433	87 300	87 650	+ 0.4
Argentina	6 725	6 400	6 400	6 700	6 800	+ 1.5
Brazil	13 400	14 500	14 200	14 800	15 100	+ 2.0
Chile	1 270	1 420	1 490	1 590	1 600	+ 0.6
Peru	652	565	645	610	650	+ 6.6
Venezuela	1 688	1 662	1 505	1 485	1 470	- 1.0
South America total	23 735	24 547	24 240	25 185	25 620	+ 1.7
Belgium/Luxembourg	3 917	3 901	3 808	3 771	3 752	- 0.5
Denmark	4 747	4 742	4 640	4 615	4 580	- 0.8
France	26 150	26 400	25 700	25 500	25 500	± 0.0
Germany	32 400	31 200	28 916	27 800	28 000	+ 0.7
Greece	675	735	695	680	680	± 0.0
Ireland	5 575	5 623	5 539	5 494	5 494	± 0.0
Italy	10 828	11 491	11 400	11 100	10 800	- 2.7
Netherlands	11 321	11 285	11 047	10 700	10 550	- 1.4
Portugal	1 420	1 519	1 542	1 620	1 680	+ 3.7
Spain	6 000	6 200	6 100	5 800	5 500	- 5.2
UK	14 647	14 952	14 492	14 450	14 500	+ 0.3
EC total	117 680	118 048	113 879	111 530	111 036	- 0.4
Austria	3 318	3 315	3 296	3 280	3 270	- 0.3
Finland	2 729	2 752	2 555	2 416	2 377	- 1.6
Norway	1 903	1 900	1 863	1 846	1 820	- 1.4
Sweden	3 420	3 520	3 220	3 200	3 258	+ 1.8
Switzerland	3 889	3 843	3 931	3 925	3 927	+ 0.1
West European third countries	15 259	15 330	14 865	14 667	14 652	- 0.1
Czecho-Slovakia	7 031	6 861	5 825	5 300	5 200	- 1.9
Hungary	2 840	2 743	2 625	2 250	2 100	- 6.7
Poland	16 371	15 801	14 504	12 800	12 250	- 4.3
Romania	4 150	4 775	4 100	3 800	3 700	- 6.9
Yugoslavia	4 599	4 500	4 450	4 100	4 000	- 2.4
East Europe	34 991	34 680	31 504	28 250	27 250	- 3.5
Baltic States	6 488	6 258	5 842	5 100	4 900	- 3.9
Other 12 Republics of the former USSR	101 900	101 979	95 395	82 200	74 900	- 8.9
Former USSR	108 388	108 237	101 237	87 300	79 800	- 8.6
South Africa	2 557	2 503	2 475	2 300	2 390	+ 3.9
India	24 000	27 500	28 200	29 400	30 500	+ 3.7
China	3 813	4 157	4 646	5 200	5 700	+ 9.6
Japan	8 059	8 190	8 259	8 465	8 550	+ 1.0
Australia 5)	6 465	6 435	6 578	6 918	6 629	- 4.2
New Zealand 6)	7 406	7 746	8 122	8 500	8 400	- 1.2
Australasia	13 871	14 181	14 700	15 418	15 029	- 2.5
Total of above 51 countries	434 727	441 954	429 438	415 015	408 177	- 1.7

Notes: 1) Total 51 countries including 12 EC states and 15 Republics of the former USSR; 2) Provisional; 3) Forecast; 4) Season starts April 1 of year named; 5) Season ends June 30 of year named; 6) Season ends May 31 of year named Source: Agra Europe (Bonn)/USDA Database selection code: TAB MILPRO

The continuing decline in production is largely due to trends in the Republics of the former USSR as well as other East European countries but less milk is also expected in Australasian countries as well as the EC. Butter production especially will fall in line with the reduction in milk supplies. The USDA projects production in the principal butter producer countries at only just on 6mt. The sharpest reduction is expected in North America, due to a cut of 9.8% in the USA itself. The reduction for the two Australasian countries will be hardly less spectacular at around 7.2% on average. In absolute terms, the heaviest fall will be suffered in the countries of the former USSR. Otherwise, production should rise slightly. After three years of drastic reductions butter production in the EC will increase by 0.3%.

Butter production in selected countries 1)

	1989	1990	1991	1992 2)	1993 3)	% change 1993:92
Canada	99	100	96	96	95	- 1.0
Mexico	33	34	31	32	32	± 0.0
USA	588	591	606	615	555	- 9.8
North America total	720	725	733	743	682	- 8.2
Argentina	45	40	38	42	44	+ 4.8
Brazil	65	75	70	77	77	± 0.0
Venezuela	2	3	3	3	3	± 0.0
South America total	112	118	111	122	124	+ 1.6
Belgium/Luxembourg	89	87	82	81	81	± 0.0
Denmark	92	93	71	63	60	- 4.8
France	518	527	494	470	460	- 2.1
Germany	711	640	555	460	480	+ 2.1
Greece	6	6	7	7	7	± 0.0
Ireland	156	159	151	137	139	+ 1.5
Italy	74	80	80	80	75	- 6.3
Netherlands	213	209	196	185	188	+ 1.6
Portugal	12	15	15	16	16	± 0.0
Spain	30	46	38	24	18	- 25.0
UK	130	138	112	96	100	+ 4.2
EC total	2 031	2 000	1 801	1 619	1 624	+ 0.3
Austria	41	40	42	40	40	± 0.0
Finland	63	63	60	54	53	- 1.9
Norway	26	29	26	23	22	- 4.3
Sweden	70	76	63	62	65	+ 4.8
Switzerland	39	38	40	39	40	+ 2.6
West European third countries	239	246	231	218	220	+ 0.9
Czecho-Slovakia	156	159	136	118	115	- 2.5
Hungary	38	38	29	25	22	- 12.0
Poland	325	300	220	180	190	+ 5.6
Romania	46	33	41	38	37	- 2.6
Yugoslavia	12	11	8	7	6	- 14.3
East Europe	577	541	434	368	370	+ 0.5
Baltic States	156	147	133	120	110	- 8.3
Other 12 Republics of former USSR	1 568	1 593	1 371	1 300	1 240	- 4.6
Former USSR	1 724	1 740	1 504	1 420	1 350	- 4.9
South Africa	16	21	17	15	16	+ 6.7
India	880	970	1 020	1 060	1 110	+ 4.7
Japan	78	76	76	89	90	+ 1.1
Australia 5)	96	111	111	116	108	- 6.9
New Zealand 6)	246	276	269	286	265	- 7.3
Australasia	342	387	380	402	373	- 7.2
Total of above 48 countries	6 719	6 824	6 307	6 056	5 959	- 1.6

Notes: 1) Total 48 countries including 12 EC states and 15 Republics of former USSR; 2) Provisional; 3) Forecast; 4) Season starts April 1 of year named; 5) Season ends June 30 of year named; 6) Season ends May 31 of year named Source: Agra Europe (Bonn)/USDA Database selection code: TAB BUTPRO

Production of skimmed milk powder is projected to fall far more steeply than milk supplies. The 44 principal SMP producer countries are expected to produce in all only 3mt, 4.8% less than in 1992. This fall will be largely due to a cut of 28.2% in the US to only 280 000t. Decreases are forecasts for Australia and New Zealand (-5%) and the countries of the former USSR (-3.8%). The downward trend seen in the EC since 1990 should continue with production of only 1.2mt. The EC decline largely reflects falls in the two principal producer countries (Germany and France). Slight increases, which will have little effect in absolute terms, are possible in West European third countries, South Africa and India.

Skimmed milk powder production in selected countries 1)

	1989	1990	1991	1992 2)	1993 3)	% change 1993:92
Canada	93	93	77	85	80	- 5.9
Mexico	6	9	9	12	14	+ 16.7
USA	397	399	398	390	280	- 28.2
North America total	496	501	484	487	374	- 23.2
Argentina	45	34	26	26	28	+ 7.7
Brazil	50	60	55	80	80	± 0.0
Chile	4	5	5	5	5	± 0.0
Venezuela	2	2	2	3	3	± 0.0
South America total	101	101	88	114	116	+ 1.8
Belgium/Luxembourg	98	94	75	80	81	+ 1.3
Denmark	13	41	17	15	13	- 13.3
France	492	580	453	410	400	- 2.4
Germany	500	509	539	390	380	- 2.6
Ireland	140	200	188	128	137	+ 7.0
Italy	0	0	0	0	0	± 0.0
Netherlands	83	70	52	52	50	- 3.8
Portugal	10	15	12	11	11	± 0.0
Spain	31	46	30	22	18	- 18.2
UK	133	166	133	100	100	± 0.0
EC total 7)	1 500	1 721	1 499	1 208	1 190	- 1.5
Austria	21	24	28	24	24	± 0.0
Finland	26	22	20	16	17	+ 6.3
Sweden	48	51	31	25	35	+ 40.0
Switzerland	33	32	30	30	29	- 3.3
West European third countries	128	129	109	95	105	+ 10.5
Poland	174	175	145	138	135	- 2.2
Yugoslavia	11	10	8	9	0	-100.0
East Europe	185	185	153	147	135	- 8.2
Baltic States	15	15	14	13	13	± 0.0
Other 12 Republics of the former USSR	285	285	260	250	240	- 4.0
Former USSR	300	300	274	263	253	- 3.8
South Africa	20	26	19	15	18	+ 20.0
India	90	72	65	65	75	+ 15.4
Japan	178	179	181	198	199	+ 0.5
Australia 5)	127	144	156	160	151	- 5.6
New Zealand 6)	181	208	172	162	155	- 4.3
Australasia	308	352	328	322	306	- 5.0
Total of 44 countries	3 606	3 866	3 474	3 177	3 024	- 4.8

Notes: 1) Total 44 countries including 12 EC states and 15 Republics of former USSR; 2) Provisional; 3) Forecast; 4) Season starts April 1 of year named; 5) Season ends June 30 of year named; 6) Season ends May 31 of year named; 7) Excluding Greece Source: Agra Europe (Bonn)/USDA Database selection code: TAB SMPPRO

In contrast to the trends depicted for the other major dairy products, the expansion will continue for cheese. Output in the 47 countries listed is expected to increase by 1.3% this year. This 1.3% is largely due to a further rise of 5.8% in the USA and one of 1.3% in the EC. EC trends will vary - sharp growth rates in Germany and Greece, modest rises in the Netherlands and France, by far the leading EC

producer country but reductions in Italy, Spain and the UK. Heavy falls are forecast in Australia and New Zealand, the former USSR, the rest of Eastern Europe and West European third countries.

Cheese production in selected countries 1)

	1989	1990	1991	1992 2)	1993 3)	% change 1993:92
Canada	247	255	262	265	268	+ 1.1
Mexico	373	384	395	390	390	± 0.0
USA	2 546	2 749	2 763	2 920	3 090	+ 5.8
North America total	3 166	3 388	3 420	3 575	3 748	+ 4.8
Argentina	260	270	290	300	290	- 3.3
Brazil	220	200	210	190	200	+ 5.6
Venezuela	94	96	84	80	77	- 3.8
South America total	574	566	584	570	567	- 0.5
Belgium/Luxembourg	38	42	45	46	47	+ 2.2
Denmark	275	293	285	288	292	+ 1.4
France	1 485	1 471	1 500	1 520	1 530	+ 0.7
Germany	885	749	777	809	880	+ 8.8
Greece	210	200	210	213	215	+ 9.7
Ireland	74	72	73	83	77	- 7.2
Italy	760	811	885	880	870	- 8.4
Netherlands	568	593	610	627	635	+ 1.3
Portugal	55	49	57	57	56	- 0.5
Spain	123	133	152	154	145	- 6.3
UK	280	316	298	305	300	- 1.6
EC total	4 753	4 729	4 892	4 982	5 047	+ 1.3
Austria	88	87	83	84	83	- 1.2
Finland	78	81	72	73	72	- 1.4
Norway	76	76	81	79	78	- 1.3
Sweden	109	108	107	105	108	+ 2.9
Switzerland	137	138	142	143	142	- 0.7
West European third countries	488	490	485	484	483	- 0.2
Czecho-Slovakia	152	150	120	125	125	± 0.0
Hungary	54	64	58	52	50	- 3.8
Poland	130	126	113	94	90	- 4.3
Romania	82	91	97	95	90	- 5.3
Yugoslavia	56	52	45	40	40	± 0.0
East Europe	474	483	433	406	395	- 2.7
Baltic States	66	65	63	50	50	± 0.0
Other 12 Republics of the former USSR	834	821	717	650	600	- 7.7
Former USSR	900	886	780	700	650	- 7.1
South Africa	48	48	45	44	45	+ 2.3
Japan	27	28	27	30	31	+ 3.3
Australia 4)	190	175	178	197	180	- 8.6
New Zealand 5)	128	122	125	139	130	- 6.5
Australasia	318	297	303	336	310	- 7.7
Total above 47 countries	10 748	10 915	10 969	11 127	11 276	+ 1.3

Notes: 1) Total 47 countries of which 12 EC states and 15 Republics of former USSR; 2) Provisional; 3) Forecast; 4) Season starts April 1 of year named; 5) Season ends June 30 of year named; 6) Season ends May 31 of year named Source: Agra Europe (Bonn)/USDA Database selection code: TAB CHEPRO (AE Bonn)b

New York futures contracts possible for dairy products: In view of the decline in turnover over the past two years the New York Coffee, Sugar and Cocoa Exchange hopes to extend futures trading to cheddar cheese and SMP. Subject to agreement from the Washington Commodities Futures Commission agrees, contracts for both, for which there will be no cash settlement, will be offered to the public in June. (AE London)vwd