

1st Dairy Conference in Hungary


by Milk Interbranch Organization and Dairy Board

Budapest, November 23rd 2011

A Tej Terméktanács
tisztelettel meghívja

**A tejj piac és a tejpiaci szabályozás
jövőbeli változásai**
című
Tejágazati Konferenciára

Időpont: 2011. november 23. (szerda)
Helyszín: ABACUS Business & Wellness Hotel
Herceghalom, Gesztenyés út 3.



A konferencián csak regisztrált vendégeinket tudjuk fogadni,
ezért kérjük részvételi szándékát

legkésőbb 2011. november 18-ig jelezze a
Sztár Média Kft. 06-1-225-1791 vagy
a 06-1-214-2790-es telefonszámain.

PROGRAM

9:00 – 10:00 **Érkezés és regisztráció**

10:00 – 10:15 **Megnyitó**
Istvánfalvi Miklós elnök
Tej Szakmaközi Szervezet és Terméktanács

10:15 – 10:45 **A KAP változásai a tejágazatban**
Potori Norbert igazgató
Agrárgazdasági Kutató Intézet

10:45 – 11:15 **Tejpiaci ártrendek, várható fejlemények a tejpiacon**
Angelo Rossi team coordinator – Clal Italy

11:15 – 11:45 **Az USA tejpiaci szabályozásának jellemzői**
dr. Tóth Attila főosztályvezető
Vidékfejlesztési Minisztérium

11:45 – 12:15 **A francia tejpiaci szabályozás jellegzetességei**
dr. Somogyi Norbert TET attasé Franciaország

12:15 – 13:00 **Büfébéd**

13:00 – 15:45 **Fórum** - Kérdések és válaszok a tejpiac alakulásáról, a magyar helyzetkép megbeszélése az előadókkal és a konferencia résztvevőivel
Moderátor: Lukács László ügyvezető igazgató
Tej Szakmaközi Szervezet és Terméktanács

16:00 - **A Tej Szakmaközi Szervezet és Terméktanács Elnökségének kihelyezett rendkívüli ülése.**
Az Elnökség részére szóló zártkörű program

Budapest, November 23rd 2011

Dairy Market Analysis

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WORLD: Milk Production / Deliveries

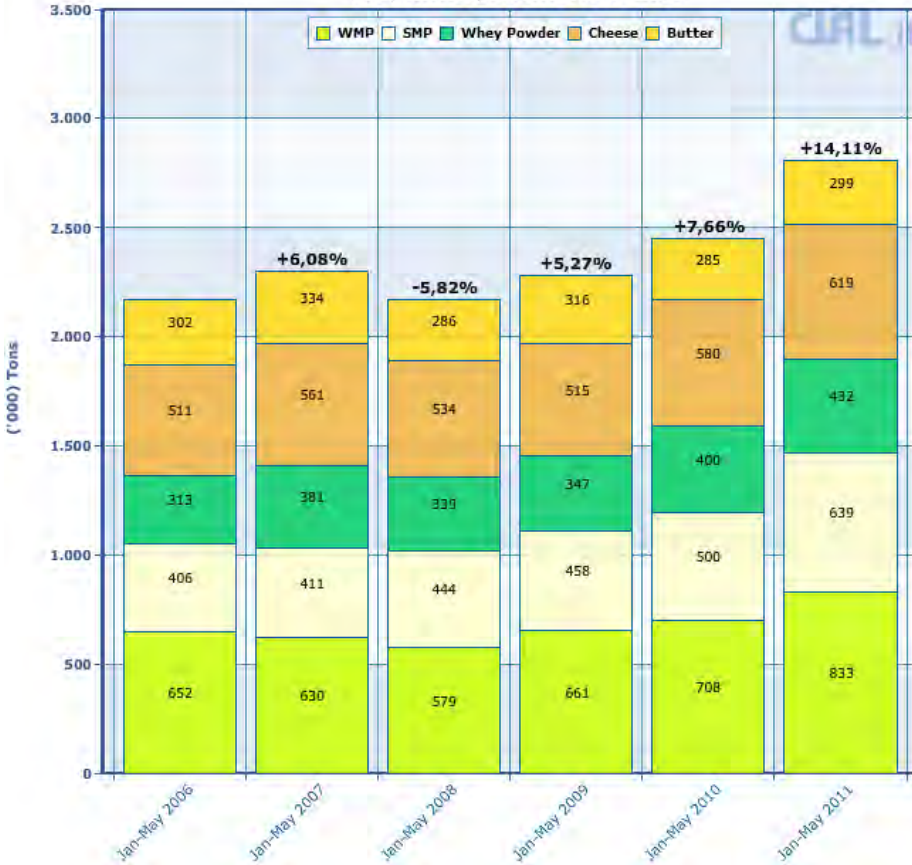
Country	Period	Volumes (Mio tons)	± % on the same period of previous year
EXPORTING COUNTRIES			
ARGENTINA *	<i>Jan-Sep 2011</i>	(e) 7.721	+14,53%
AUSTRALIA *	<i>Jan-Sep 2011</i>	6.273	+1,37%
BRAZIL *	<i>Jan-Jun 2011</i>	(e) 10.471	+3,32%
CHILE *	<i>Jan-Aug 2011</i>	1.282	+6,96%
NEW ZEALAND	<i>Jan-Jul 2011</i>	7.562	+12,10%
UKRAINE	<i>Jan-Sep 2011</i>	8.710	-2,11%
EU-27	<i>Jan-Aug 2011</i>	94.247	+2,26%
USA	<i>Jan-Sep 2011</i>	66.941	+1,59%
URUGUAY *	<i>Jan-Sep 2011</i>	1.278	+19,61%

* Mio litres

WORLD: Breakdown of Dairy Product Exports

Breakdown of Dairy Product Exports
 (+/- % on the same period of previous year)
Jan-May

Data processed by CIal based on GTIS source



Breakdown of Dairy Product Exports
 (+/- % on the same period of previous year)
Jan-Aug

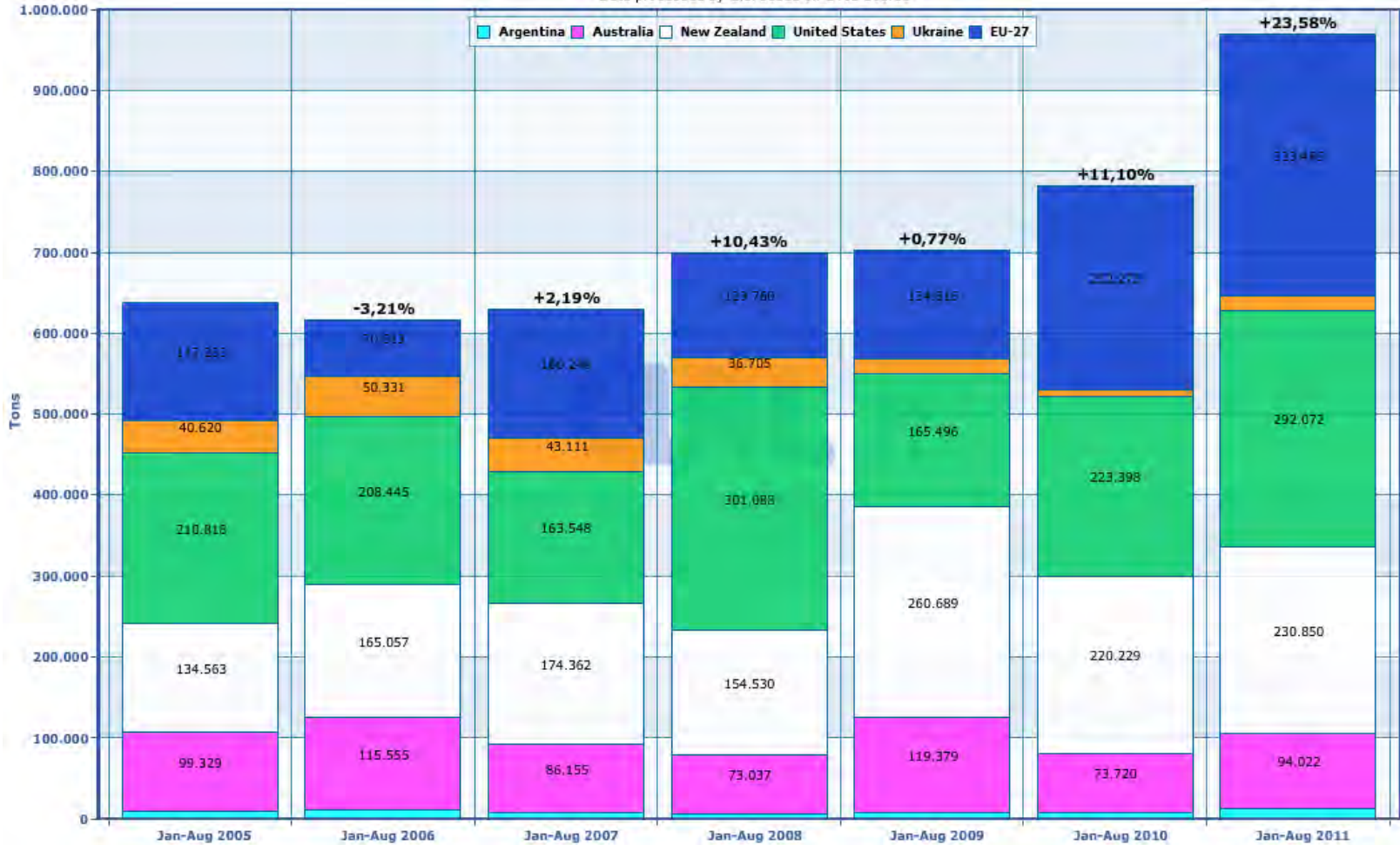
Data processed by CIal based on GTIS source



WORLD: Skimmed Milk Powder Exports

040210 SMP Exports by Country
 (+/- % on the same period of previous year)

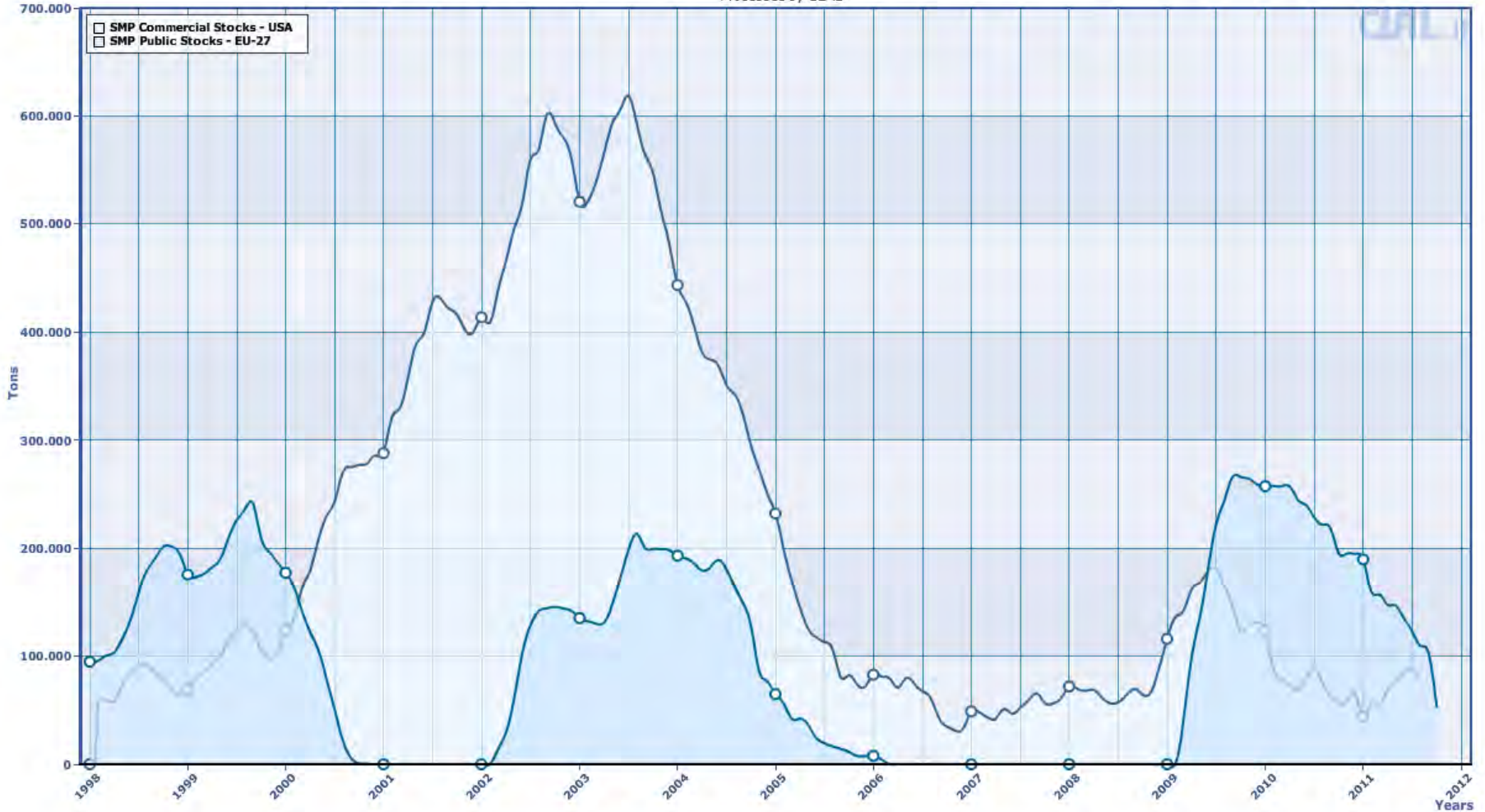
Data processed by CIAL based on GTIS source



Skimmed Milk Powder Stocks

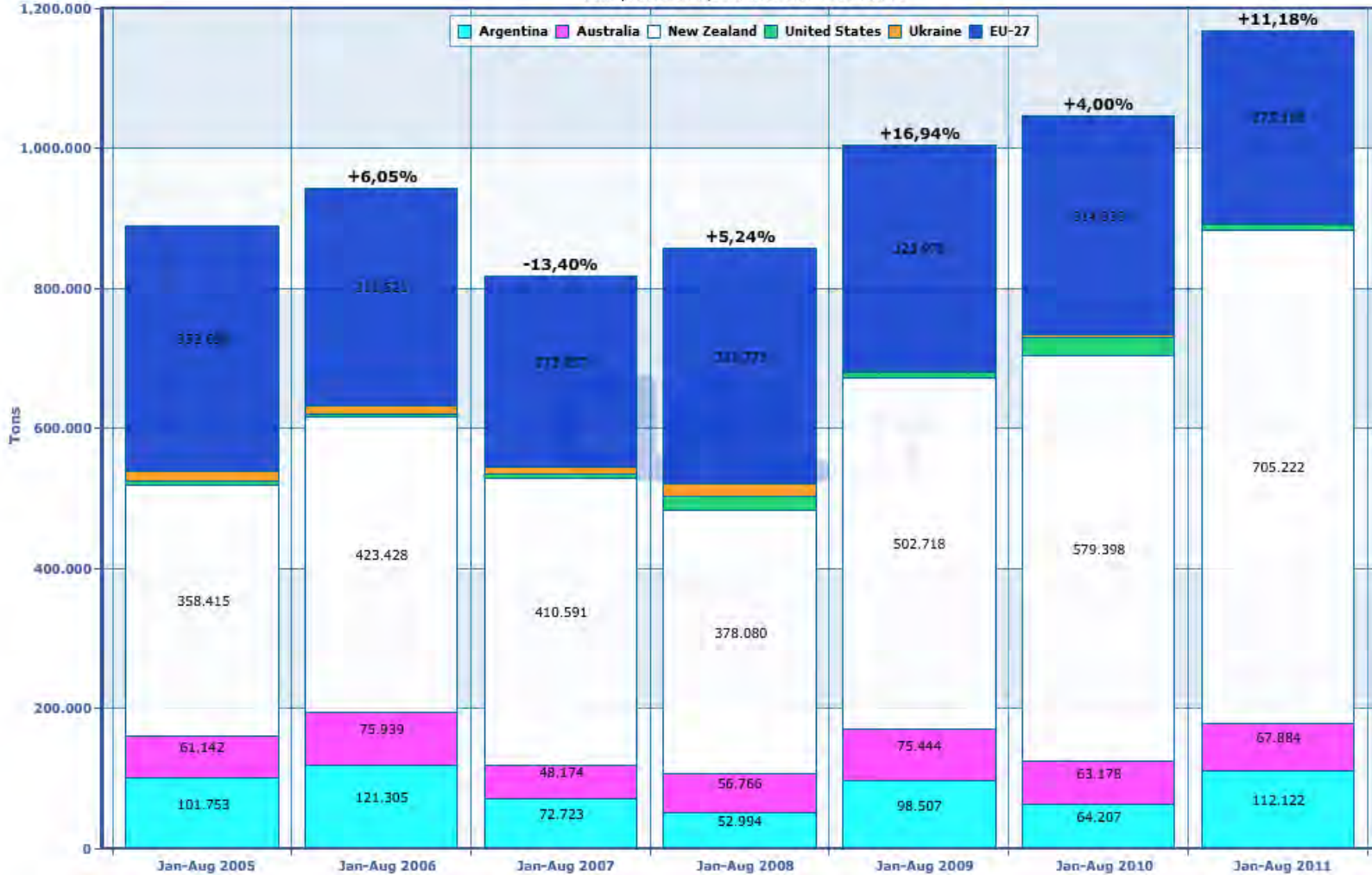
Comparative historical overview on SMP Stocks in the EU-27 and US

Processed by CLAL



WORLD: Whole Milk Powder Exports

040221 WMP Exports by Country
 (+/- % on the same period of previous year)
 Data processed by CIAL based on GTIS source

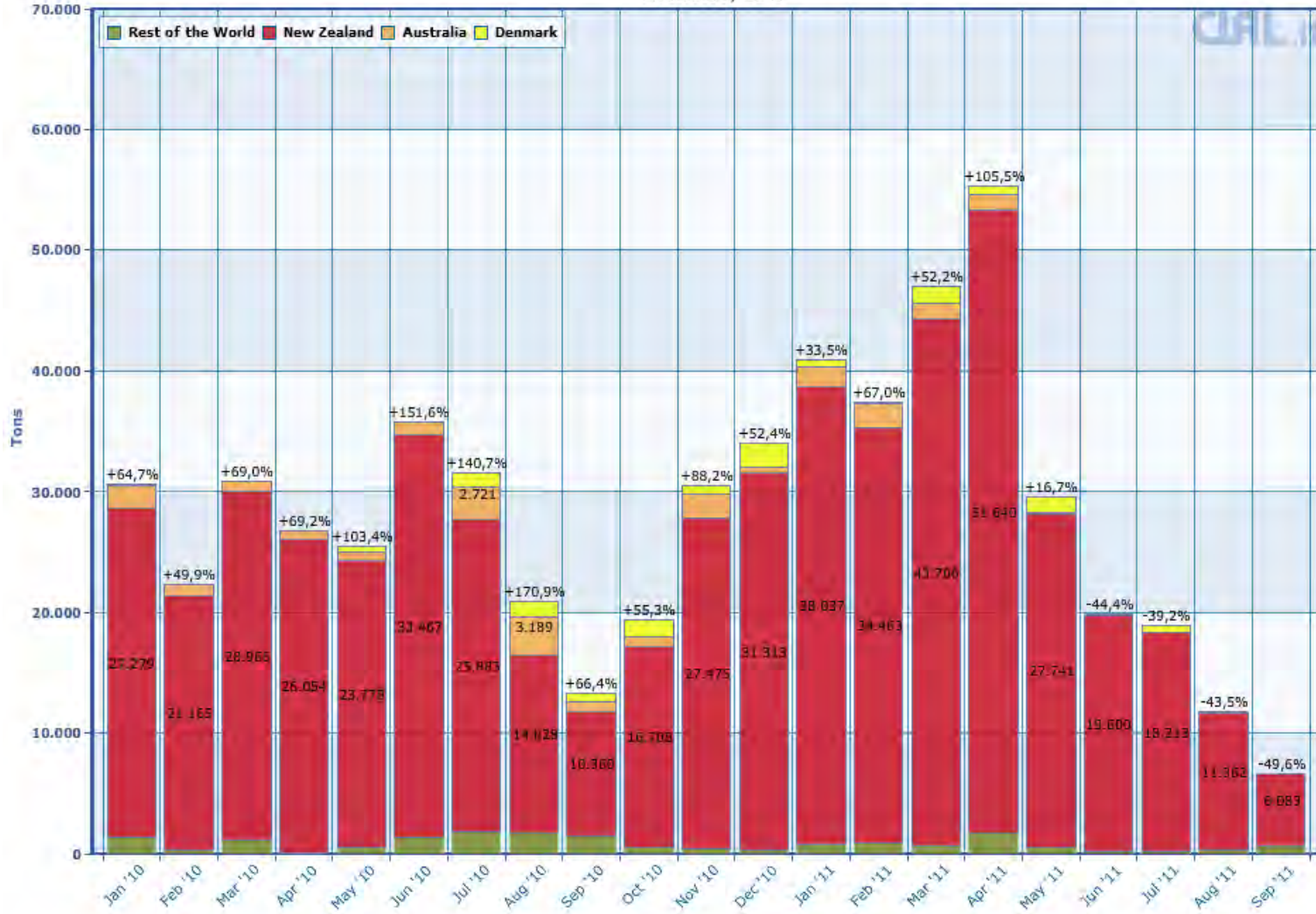


Whole Milk Powder: focus on China

CHINA: Monthly trend Imports and main Supplying Countries

(+/- % on the same period of previous year)

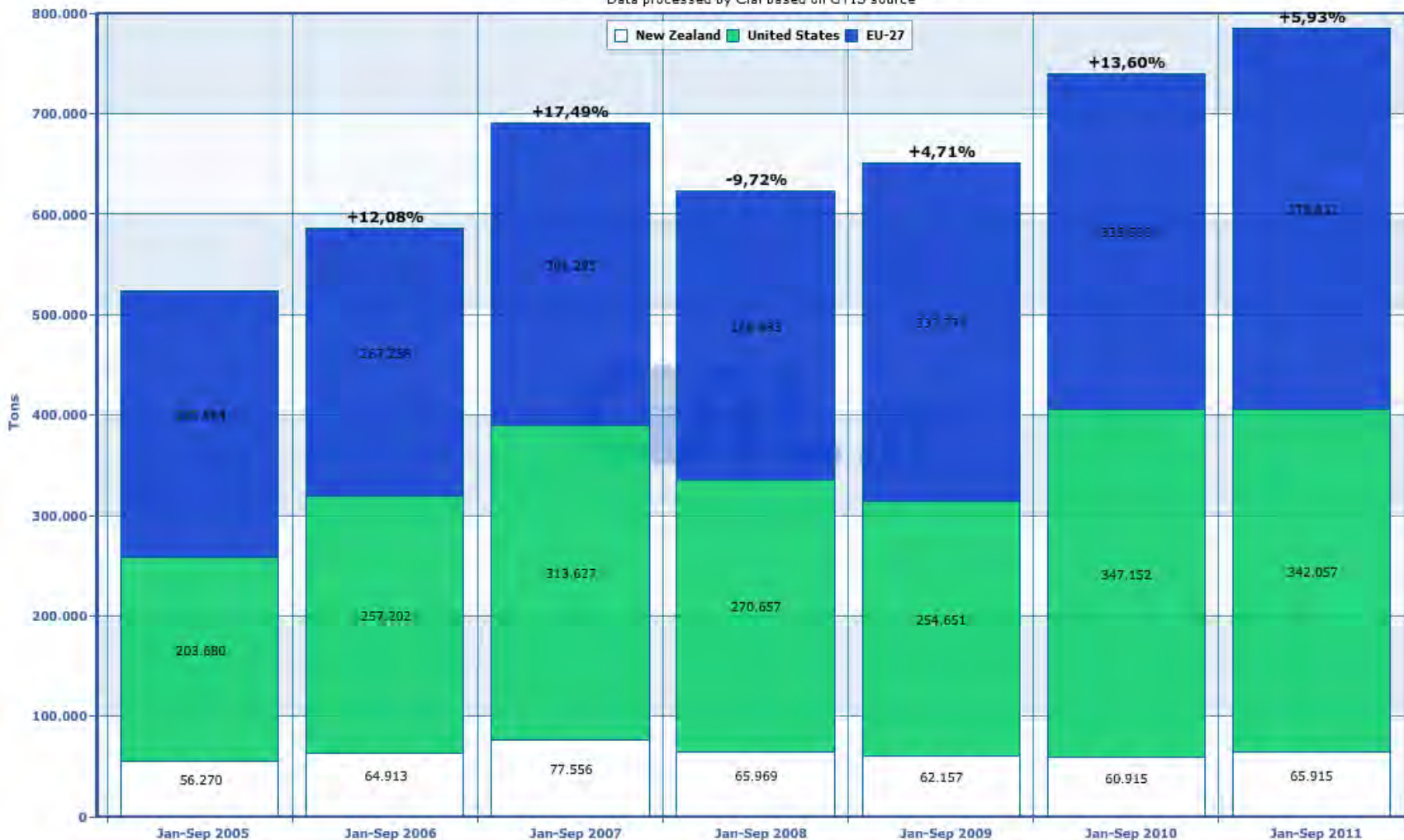
Processed by CLAL



WORLD: Whey Powder Exports

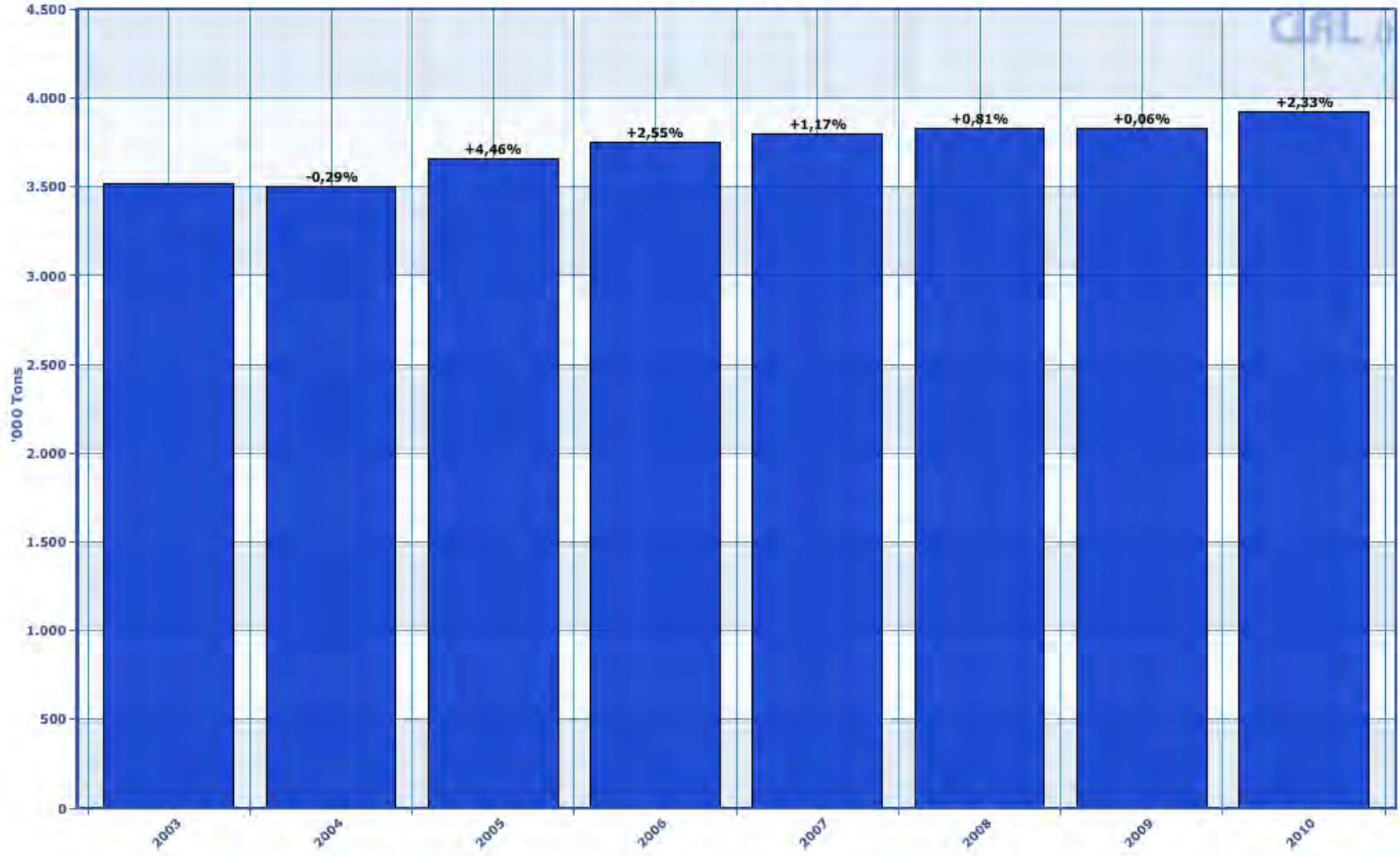
0404 WHEY Exports by Country
 (+/- % on the same period of previous year)

Data processed by CIAL based on GTIS source



EU-27: Whey Powder

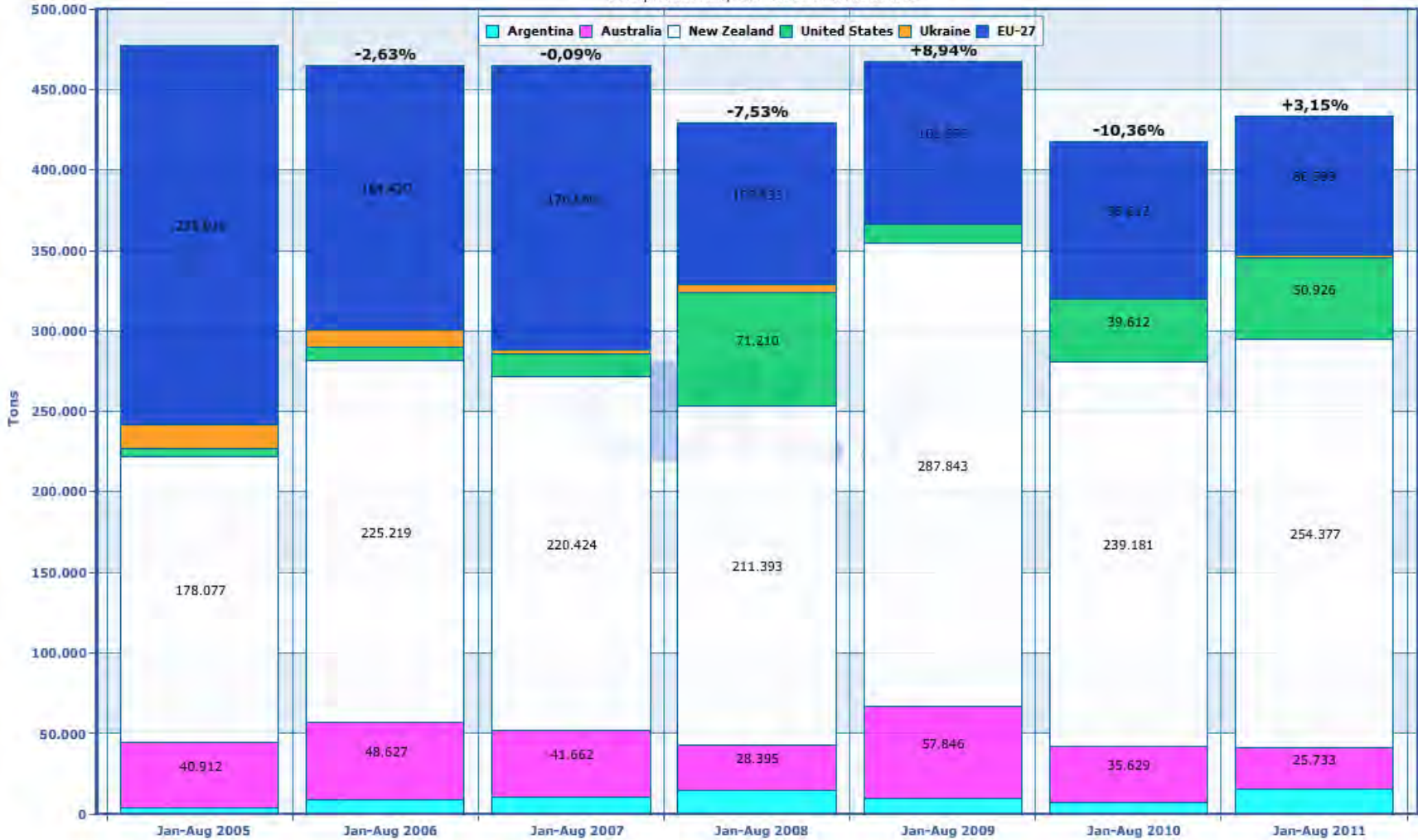
EU-27: Whey Powder that could be obtained from Cheese Production
Processed by CLAL on Eurostat data



WORLD: Butter Exports

0405 BUTTER Exports by Country
 (+/- % on the same period of previous year)

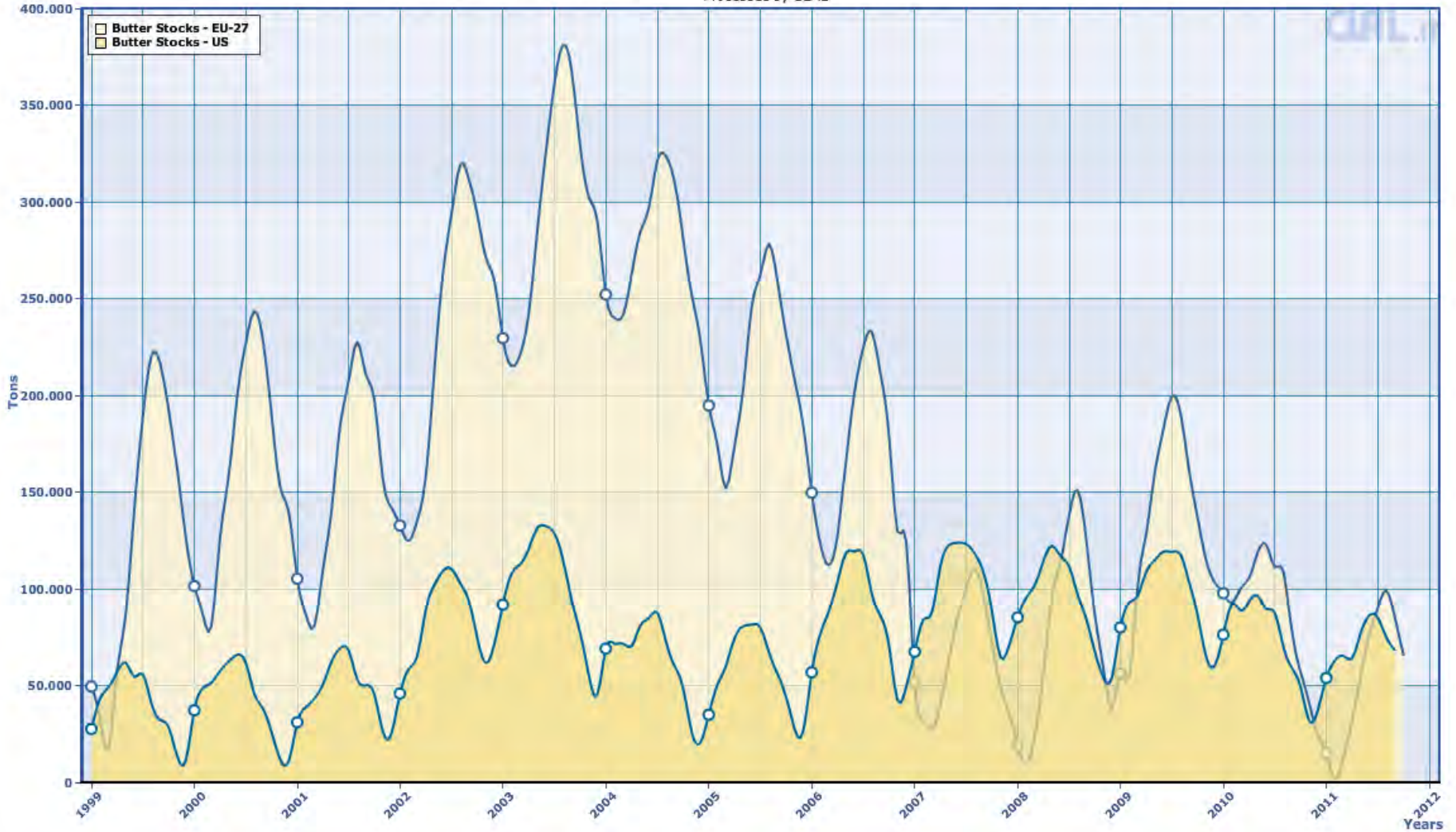
Data processed by CIAL based on GTIS source



Butter Stocks

Comparative historical overview on BUTTER stocks in the EU-27 and US

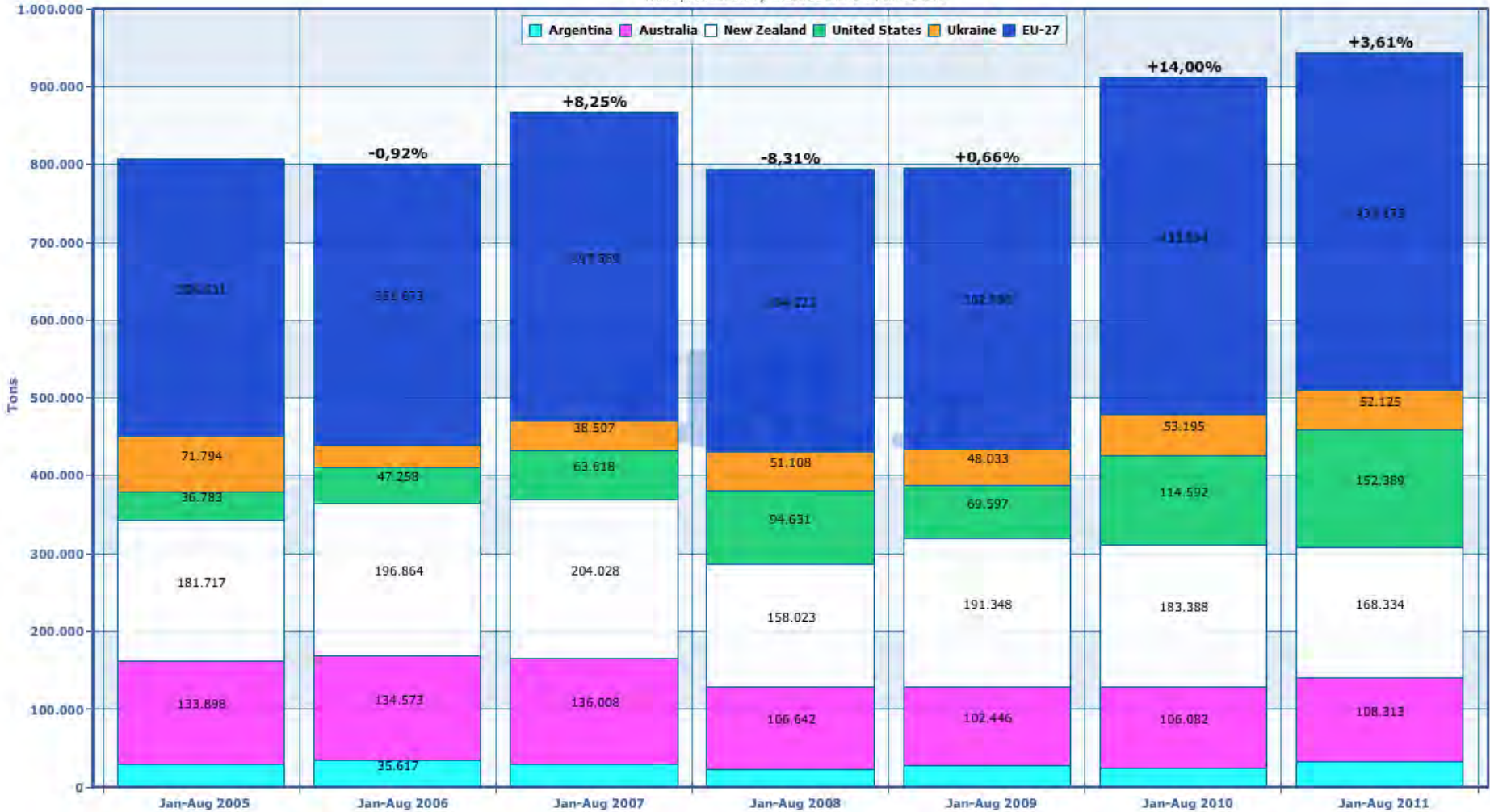
Processed by CLAL



WORLD: Cheese Exports

0406 CHEESE Exports by Country
 (+/- % on the same period of previous year)

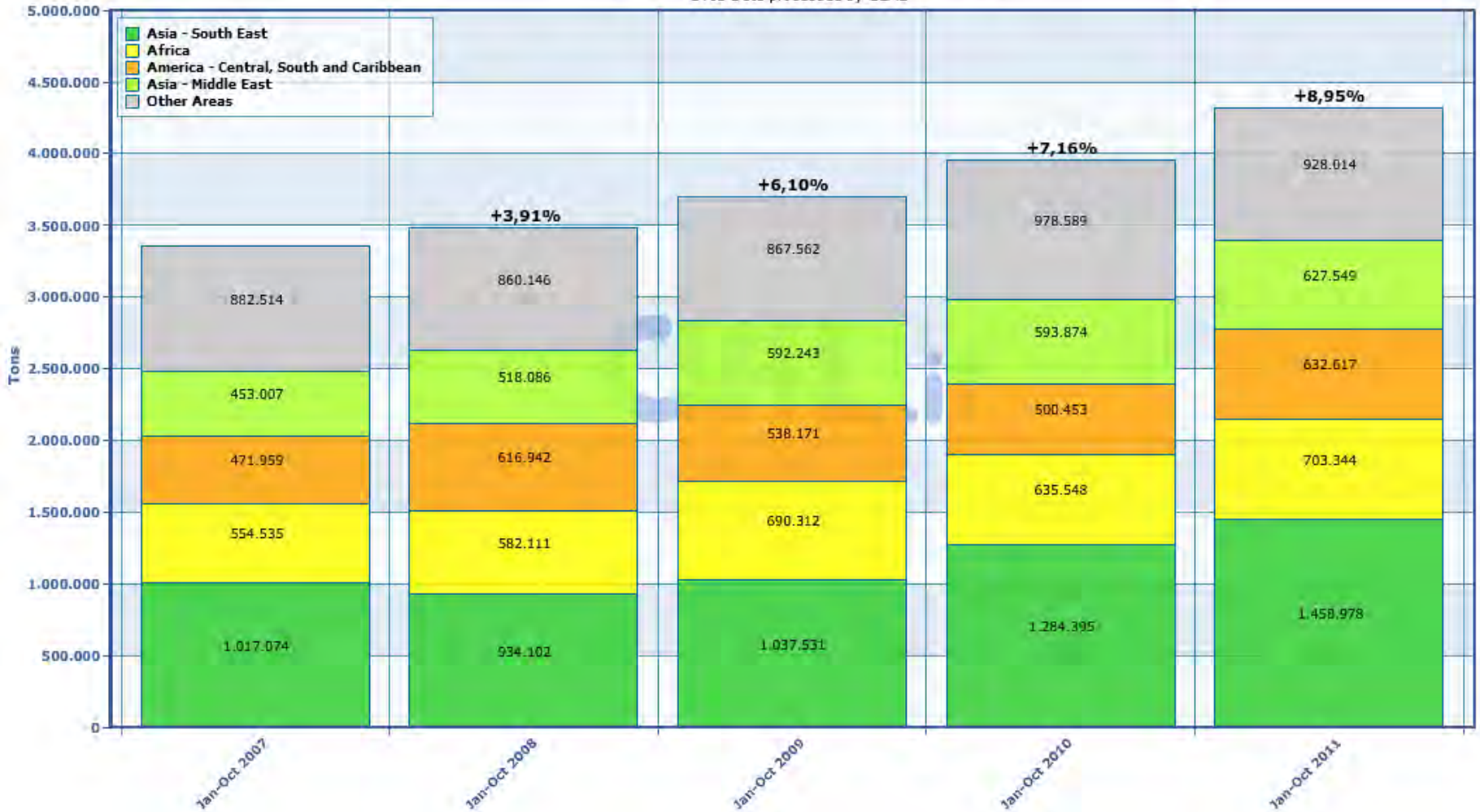
Data processed by CIAL based on GTIS source



Regional imports for manufactured dairy products

Regional imports for WMP, SMP, BUTTER, CHEESE
 (+/- % on the same period of previous year)

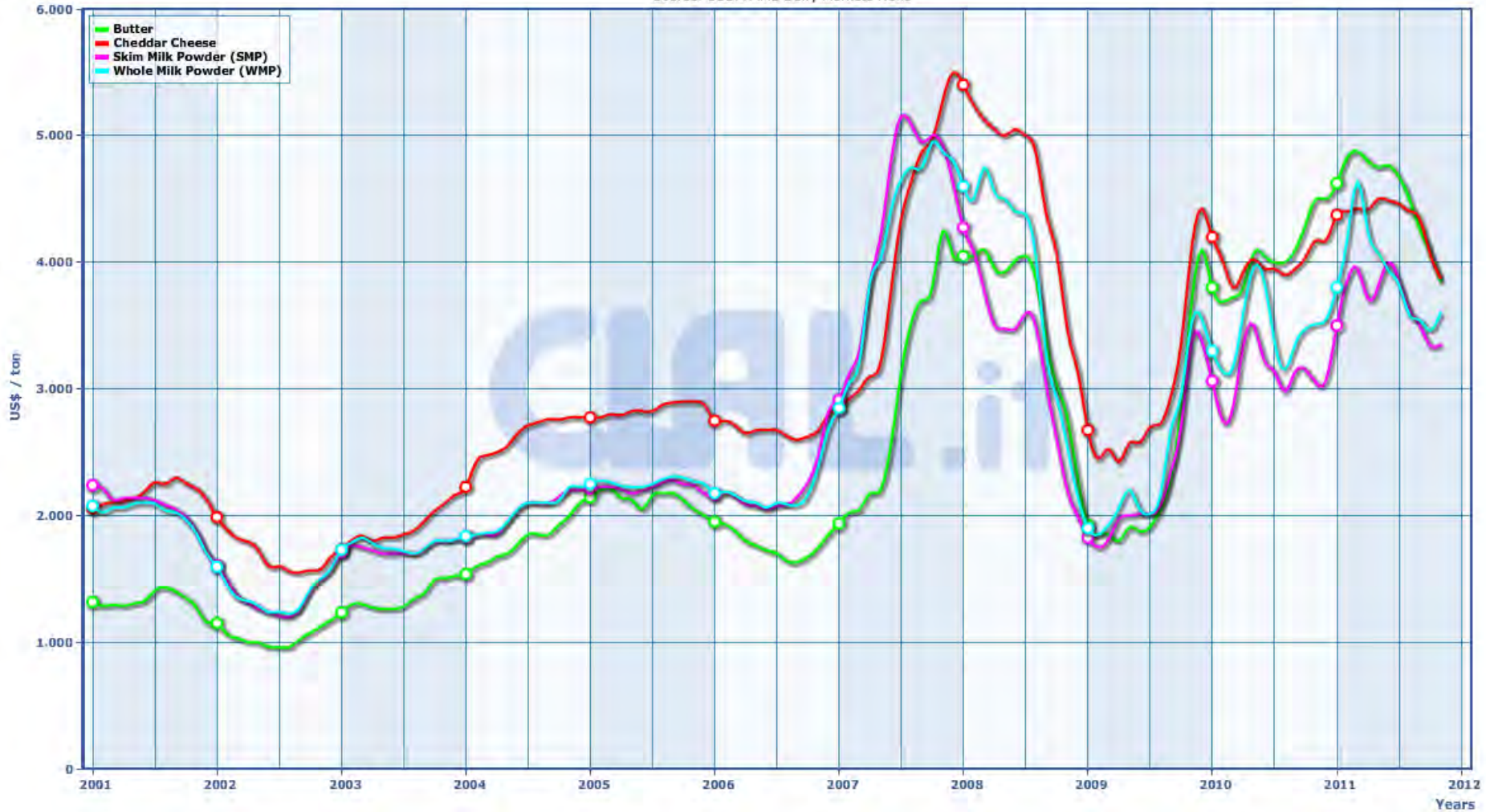
GTIS Data processed by CLAL



World dairy market price

Price comparison among BUTTER , CHEDDAR, SMP, WMP
(US\$ per Ton)

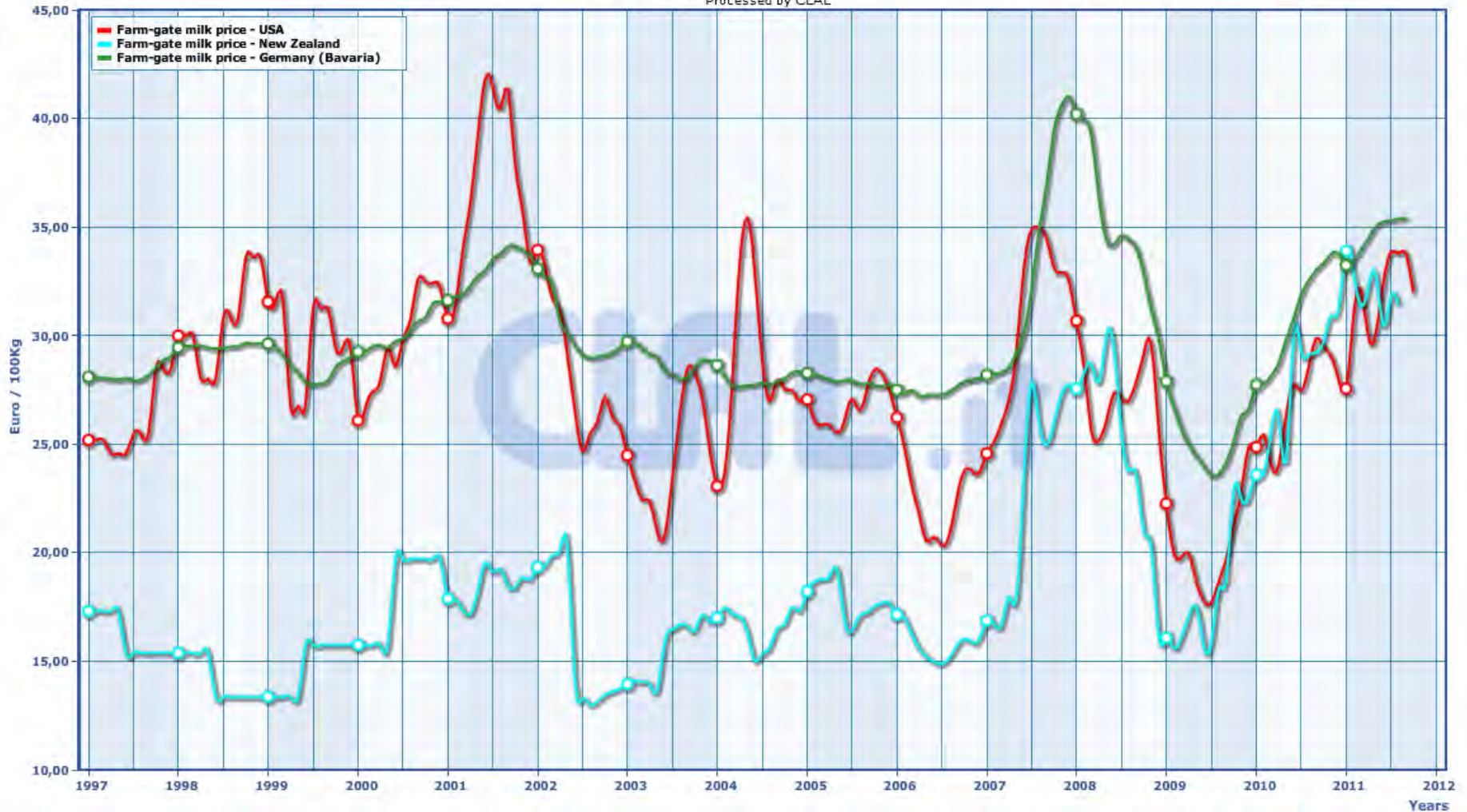
Source: USDA AMS Dairy Markets News



Farm-gate Milk

Historical comparative overview on Farm-gate Milk prices in Bavaria (D), the US, New Zealand

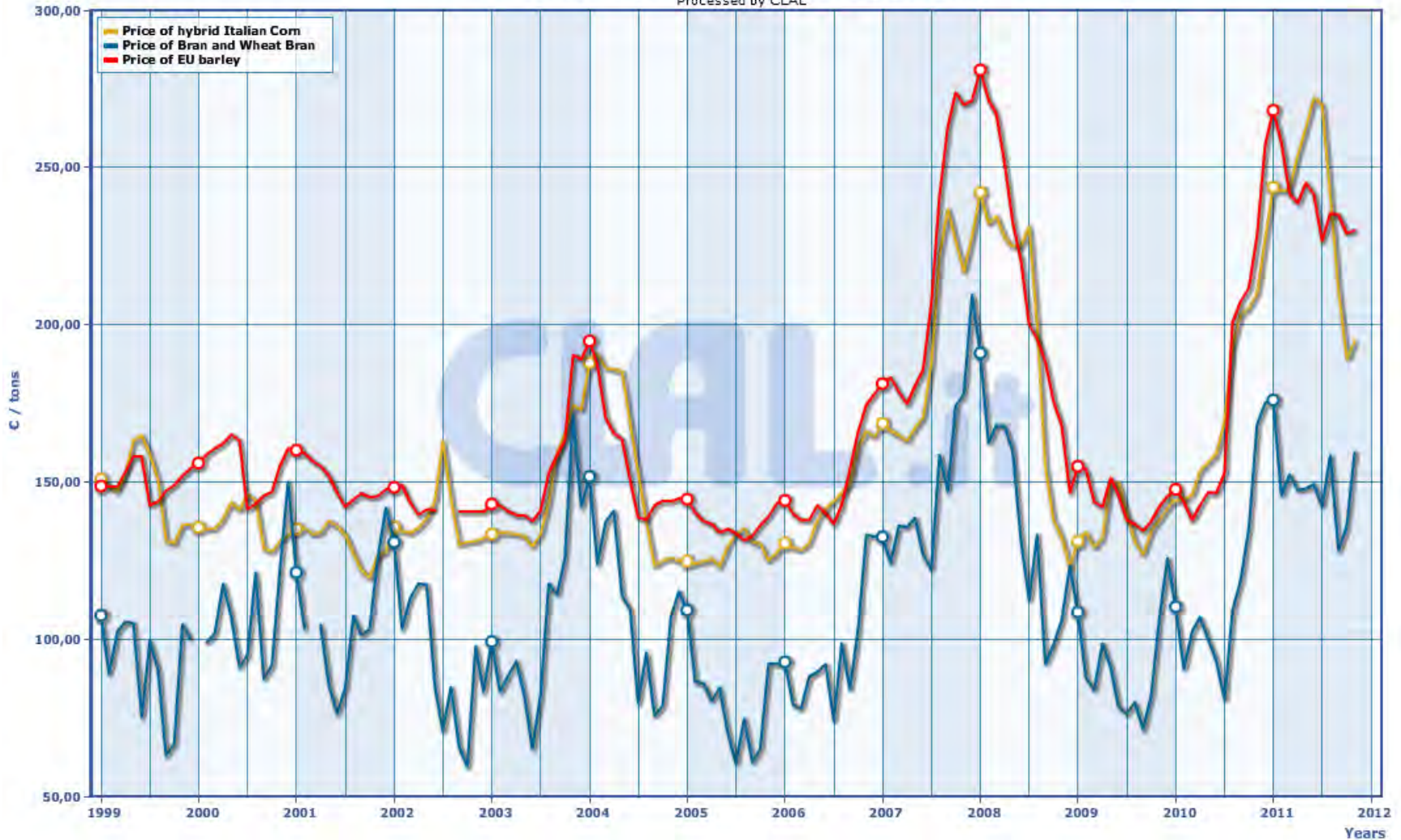
Processed by CLAL



ITALY: Prices of Livestock Foods - comparison

Italy, Milan - Comparative historical overview of prices
of food for livestock - Cereals and by-products

Processed by CLAL



EU-27 Dairy Exports outside the EU

EU-27 Dairy Exports outside the EU
(+/- % on the same period of previous year)

Jan-Jun

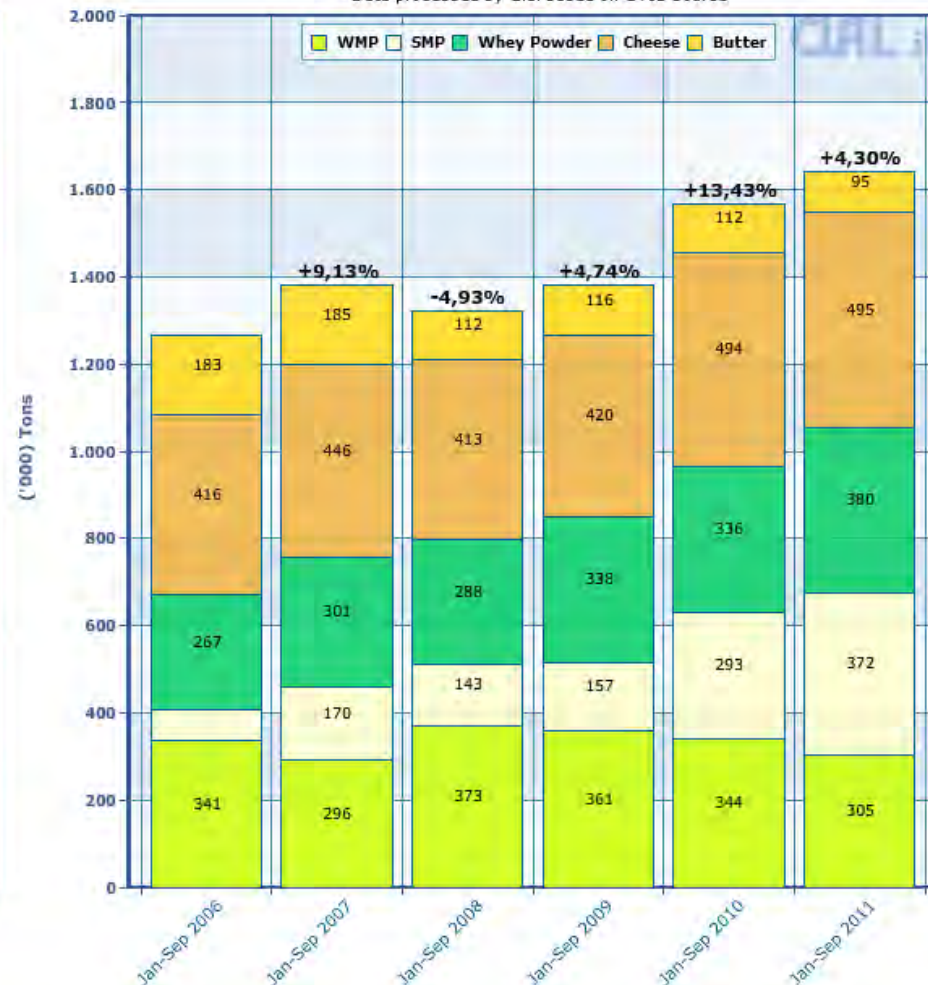
Data processed by Clal based on GTIS source



EU-27 Dairy Exports outside the EU
(+/- % on the same period of previous year)

Jan-Sep

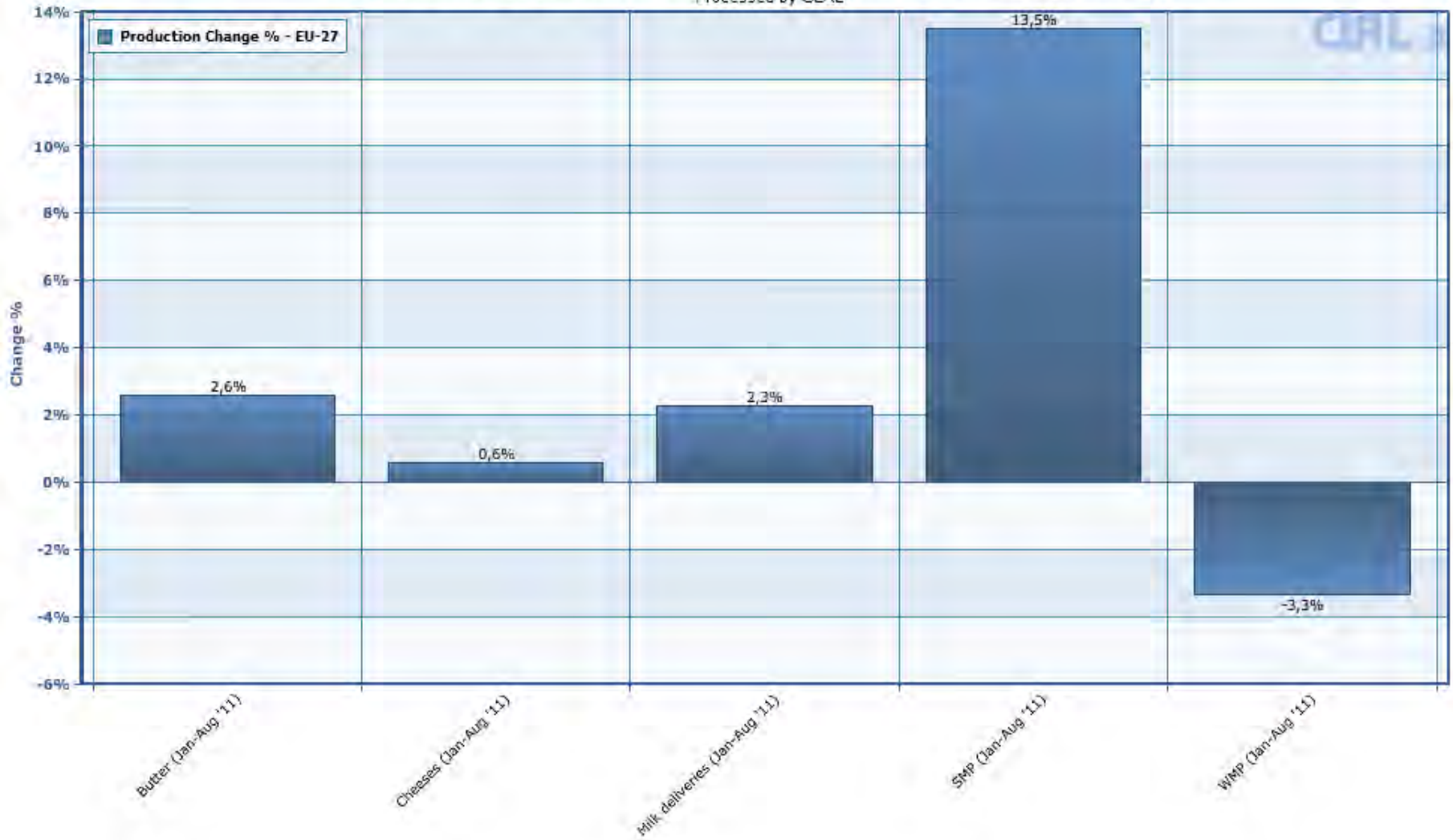
Data processed by Clal based on GTIS source



EU-27: Total Production

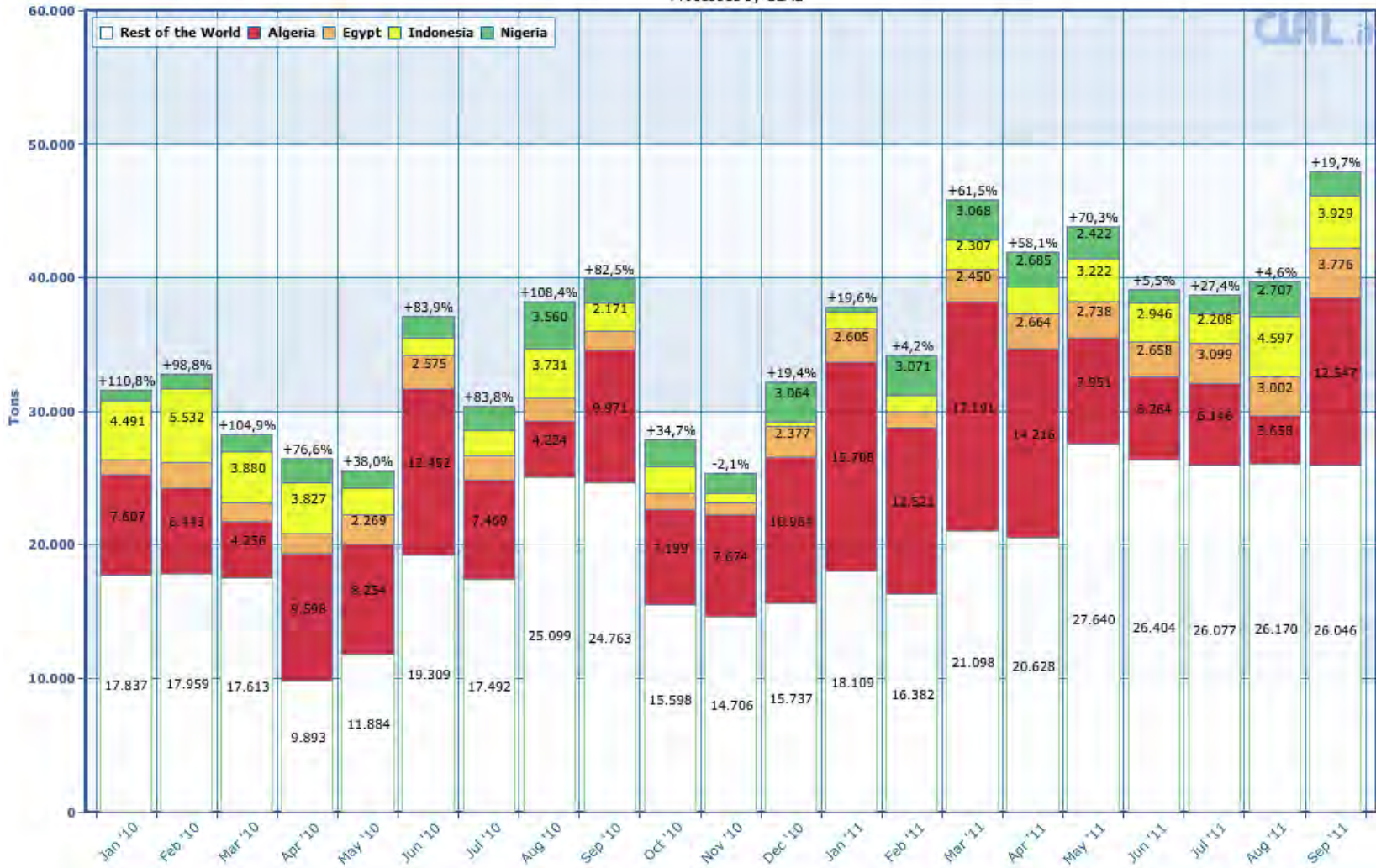
EU-27: share of production compared to the same period of previous year

Processed by CLAL



Focus on SMP Exports outside the EU-27

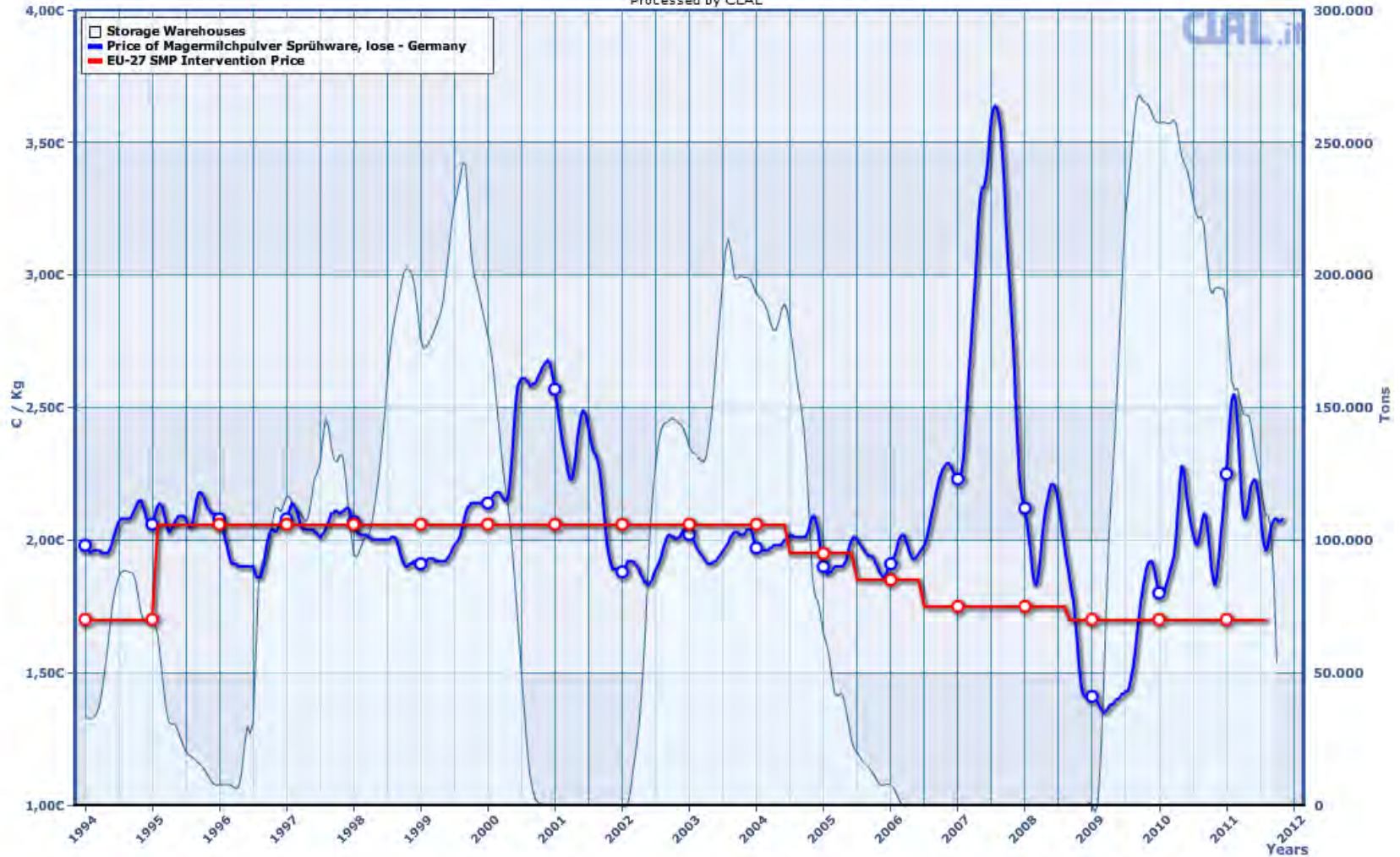
EU-27: Monthly trend Exports and main Purchasing Countries
 (+/- % on the same period of previous year)
 Processed by CLAL



Focus on SMP stocks

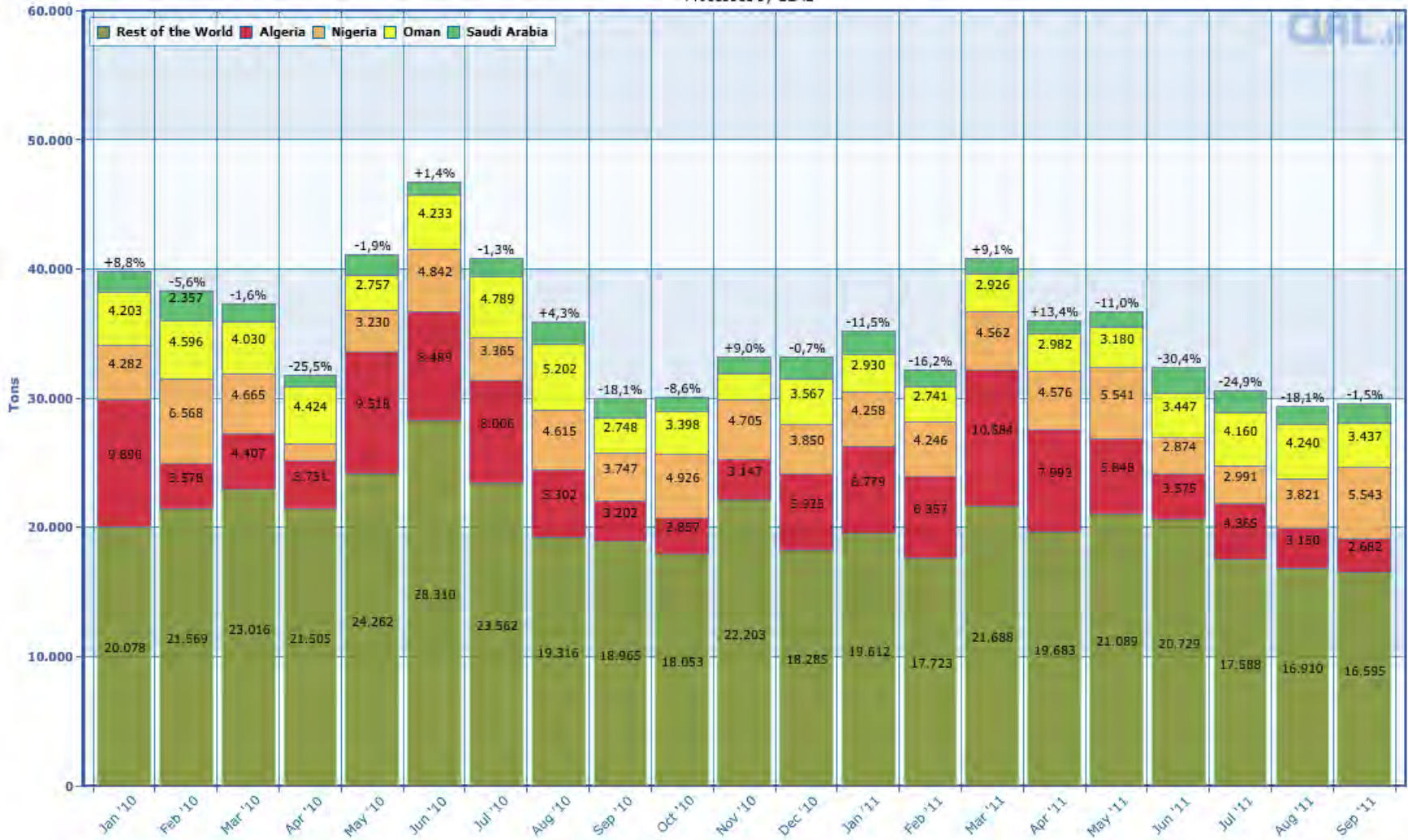
EU-27 comparative overview for SMP stocks, SMP intervention price and SMP market price in Germany

Processed by CLAL



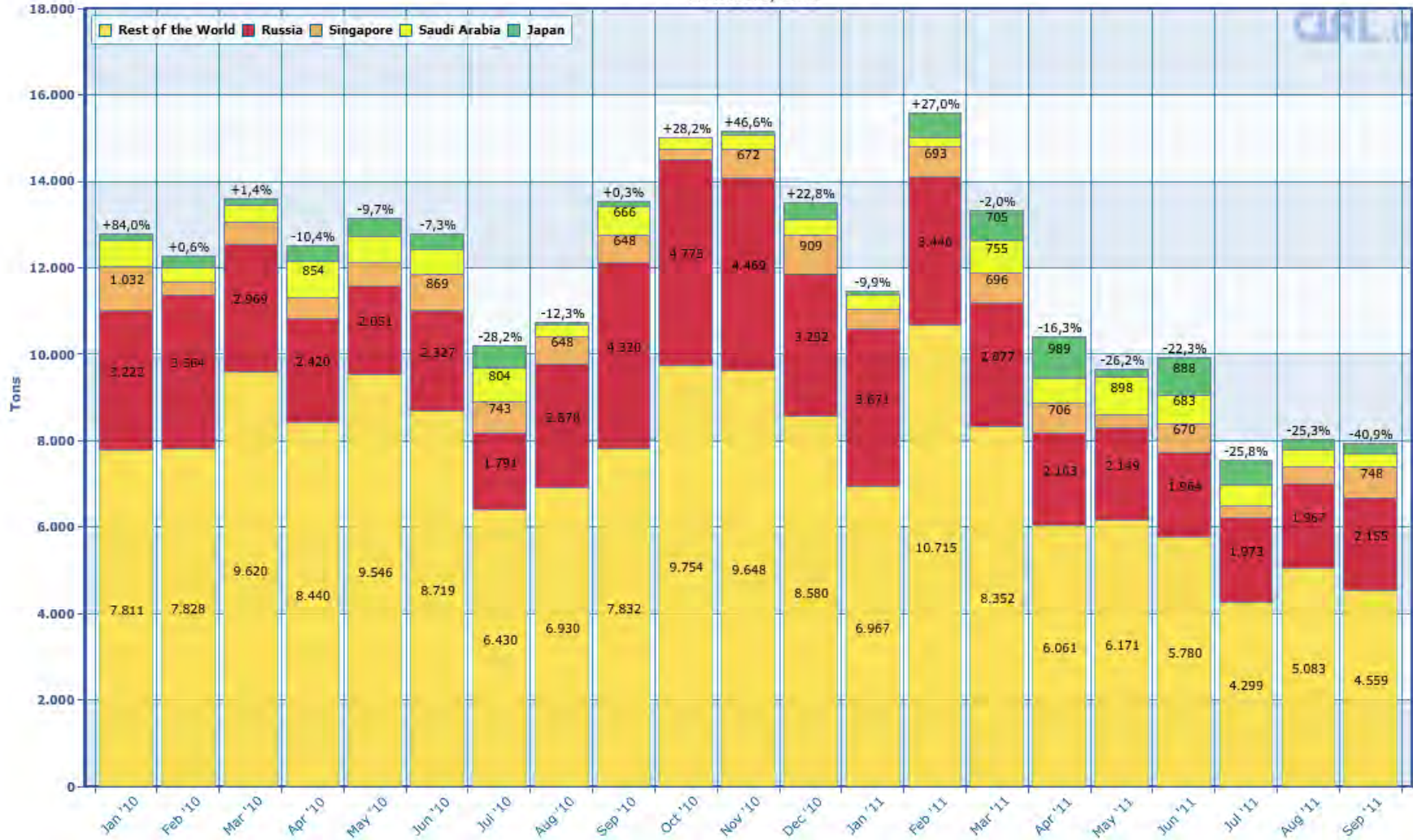
Focus on WMP Exports outside the EU-27

EU-27: Monthly trend Exports and main Purchasing Countries
 (+/- % on the same period of previous year)
 Processed by CLAL



Focus on BUTTER Exports outside the EU-27

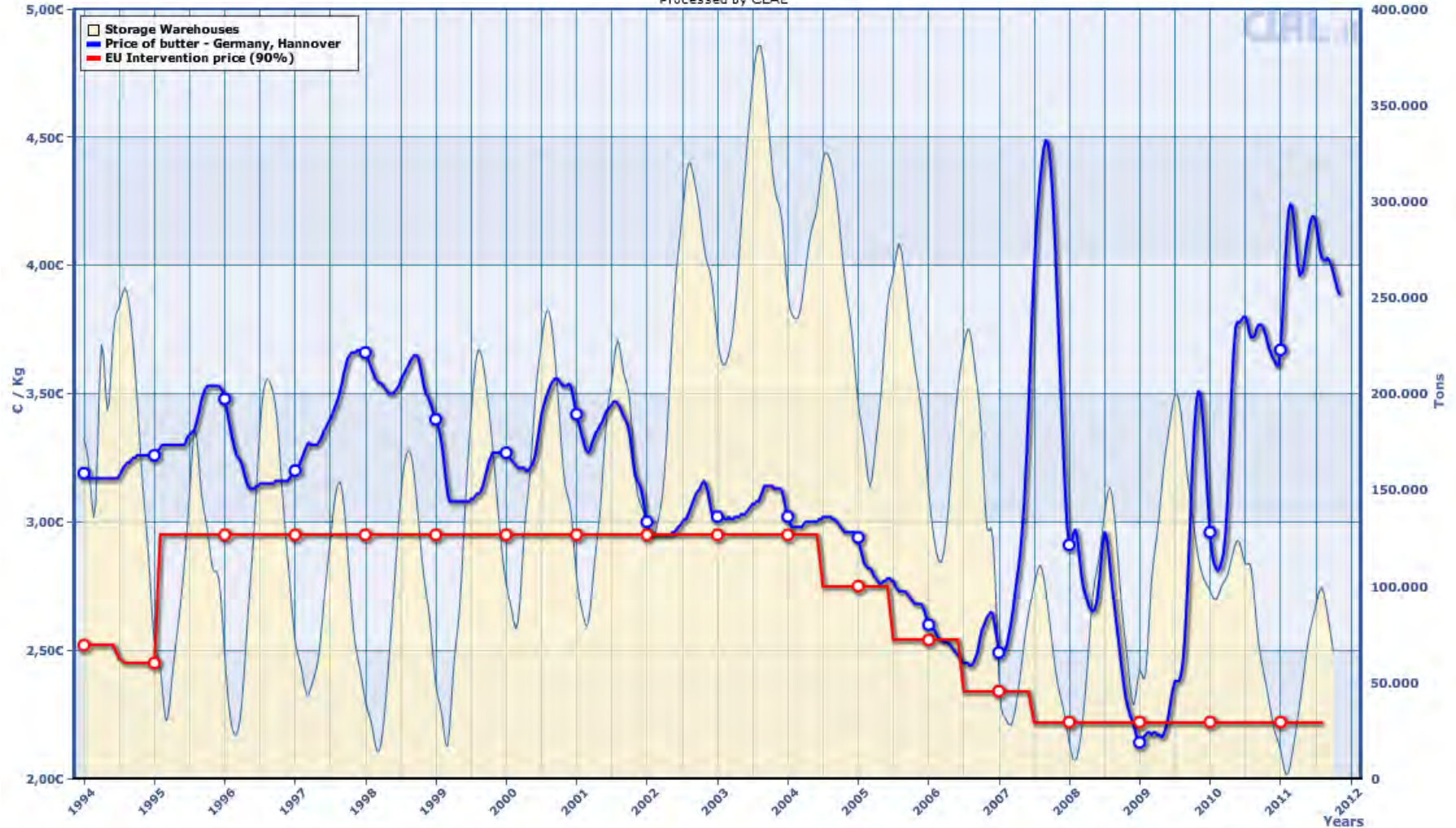
EU-27: Monthly BUTTER trend Exports and main BUTTER Purchasing Countries
 (+/- % on the same period of previous year)
 Processed by CLAL



Focus on BUTTER stocks

EU-27 comparative overview for BUTTER stocks, SMP intervention price and BUTTER market price in Germany

Processed by CLAL

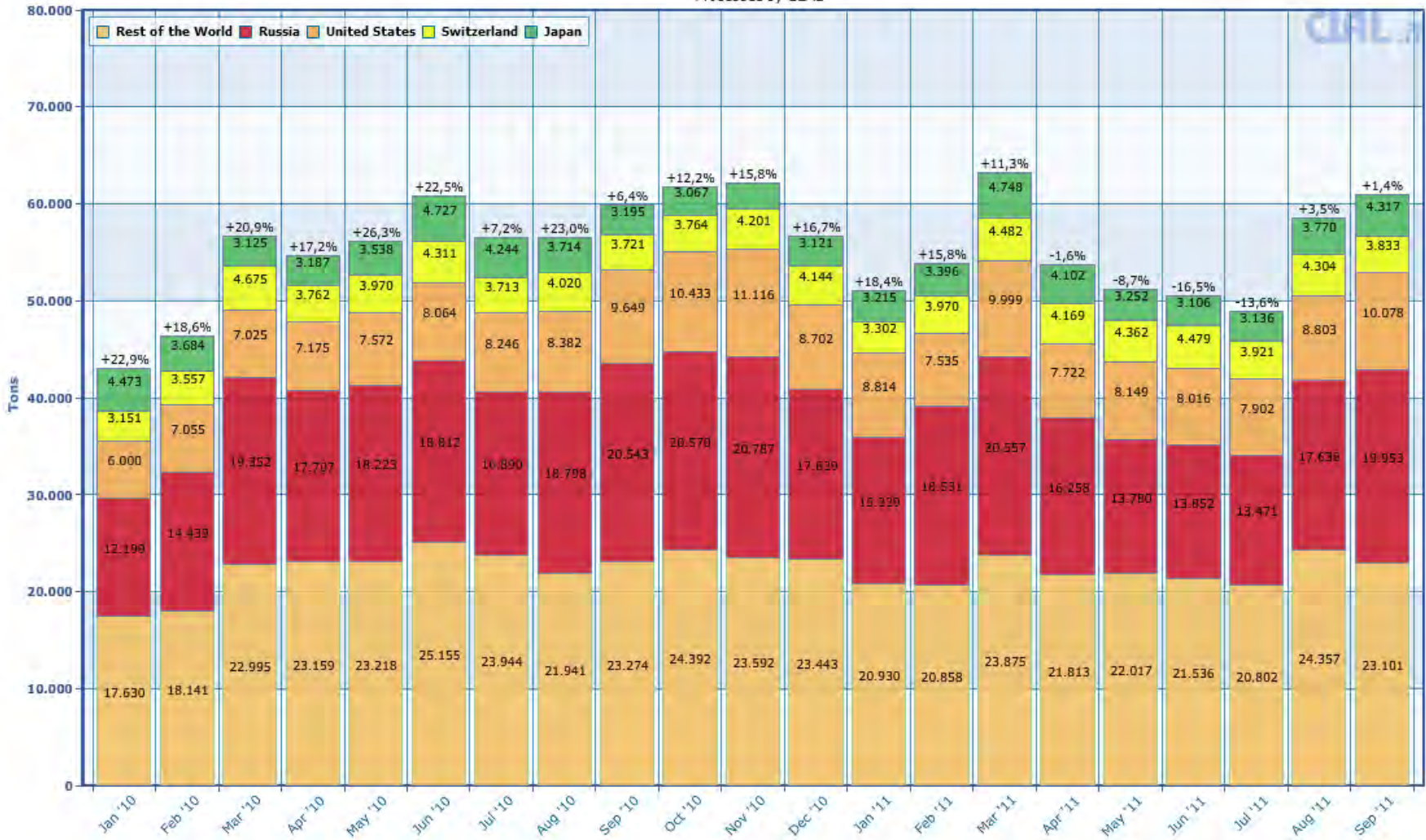


Focus on CHEESE exports outside the EU

EU-27: Monthly CHEESE trend Exports and main CHEESE Purchasing Countries

(+/- % on the same period of previous year)

Processed by CLAL

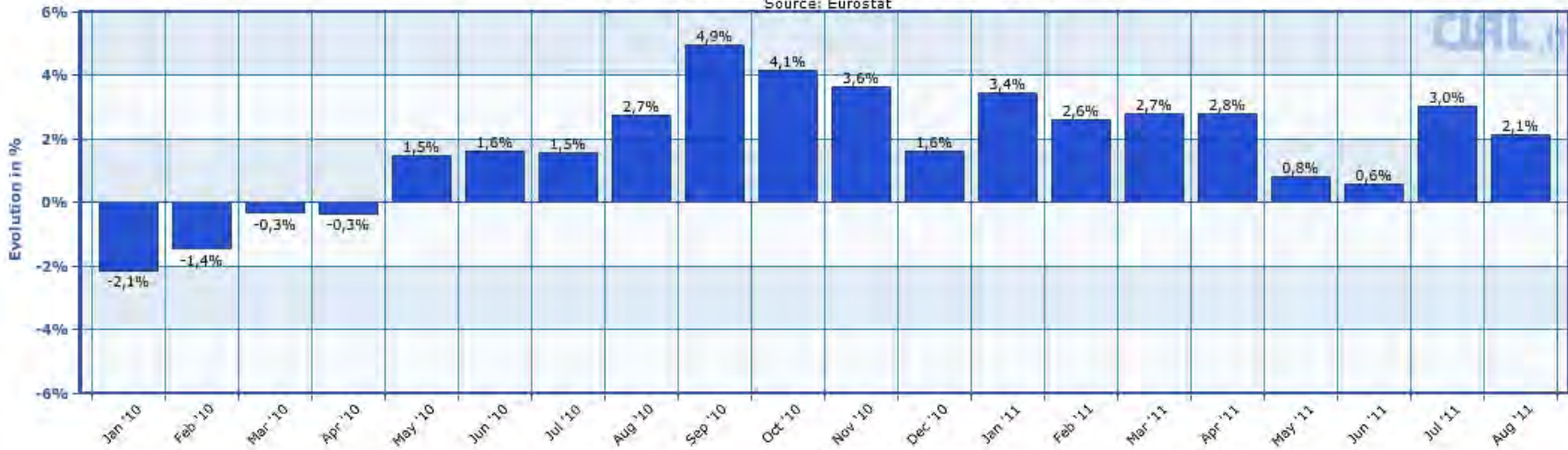


Focus on HUNGARY

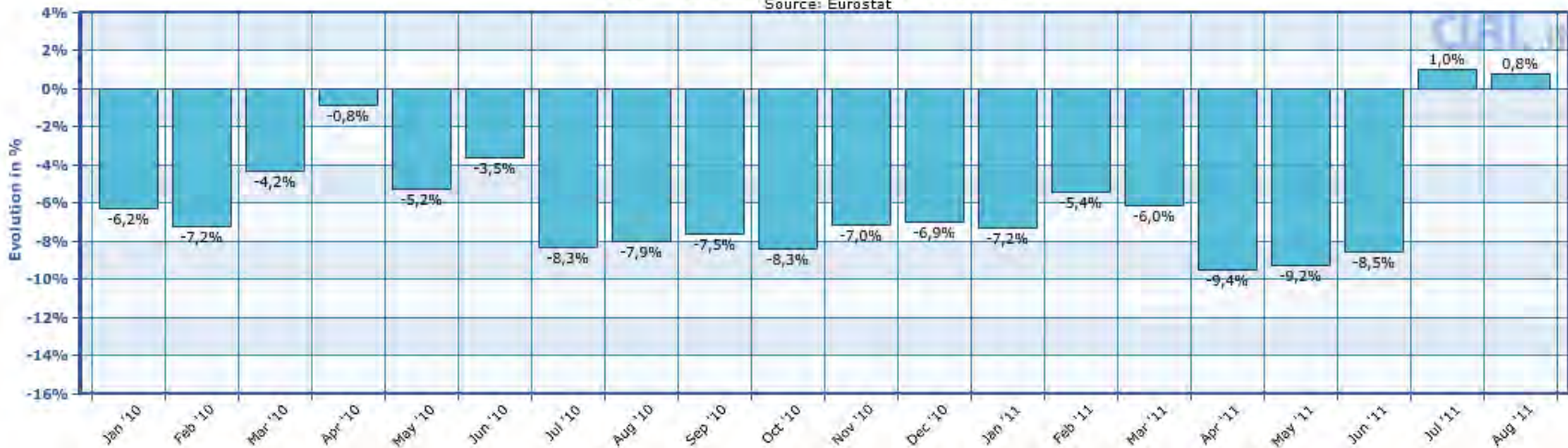
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Milk deliveries in the EU-27

EU-27 - Milk deliveries:
(+/- % on the same period of previous year)
Source: Eurostat



Hungary - Milk deliveries:
(+/- % on the same period of previous year)
Source: Eurostat



Hungary: Dairy Sector and focus on Export

	HUNGARY					
x 1.000 ton	2005	2006	2007	2008	2009	2010
EXPORT						
Bulk Milk (HS 04011090 + 04012099) intra-extra UE	94	123	218	263	243	246
of which skimmed (HS 04011090)	18,8	0,0	85	94	65	76
of which to Italy	18,7	0,0	73	75	51	45,6
<i>incidence</i>	99,5%		85,3%	79,2%	77,7%	60,4%
of which whole (HS 04012099)	75	123	132	169	177	171
of which to Italy	82	91	86	69	104	102
<i>incidence</i>	109,9%	74,6%	65,0%	40,9%	58,5%	59,6%
Packed Milk (HS 04012011 + 04012091) intra-extra UE	9,3	7,0	3,6	5,9	24,1	31,8
of which semi-skimmed (HS 04012011)	8,1	7,0	2,6	5,0	19,0	23,2
of which whole (HS 04012091)	1,2	0,0	1,0	0,9	5,1	8,6
Butter (HS 0405)	1,8	0,0	0,6	0,7	0,7	1,5
Cheese (HS 0406)	16,5	13,7	11,4	10,5	11,8	13,7

Hungary: Bulk Milk Export

Hungary: Bulk Milk Export

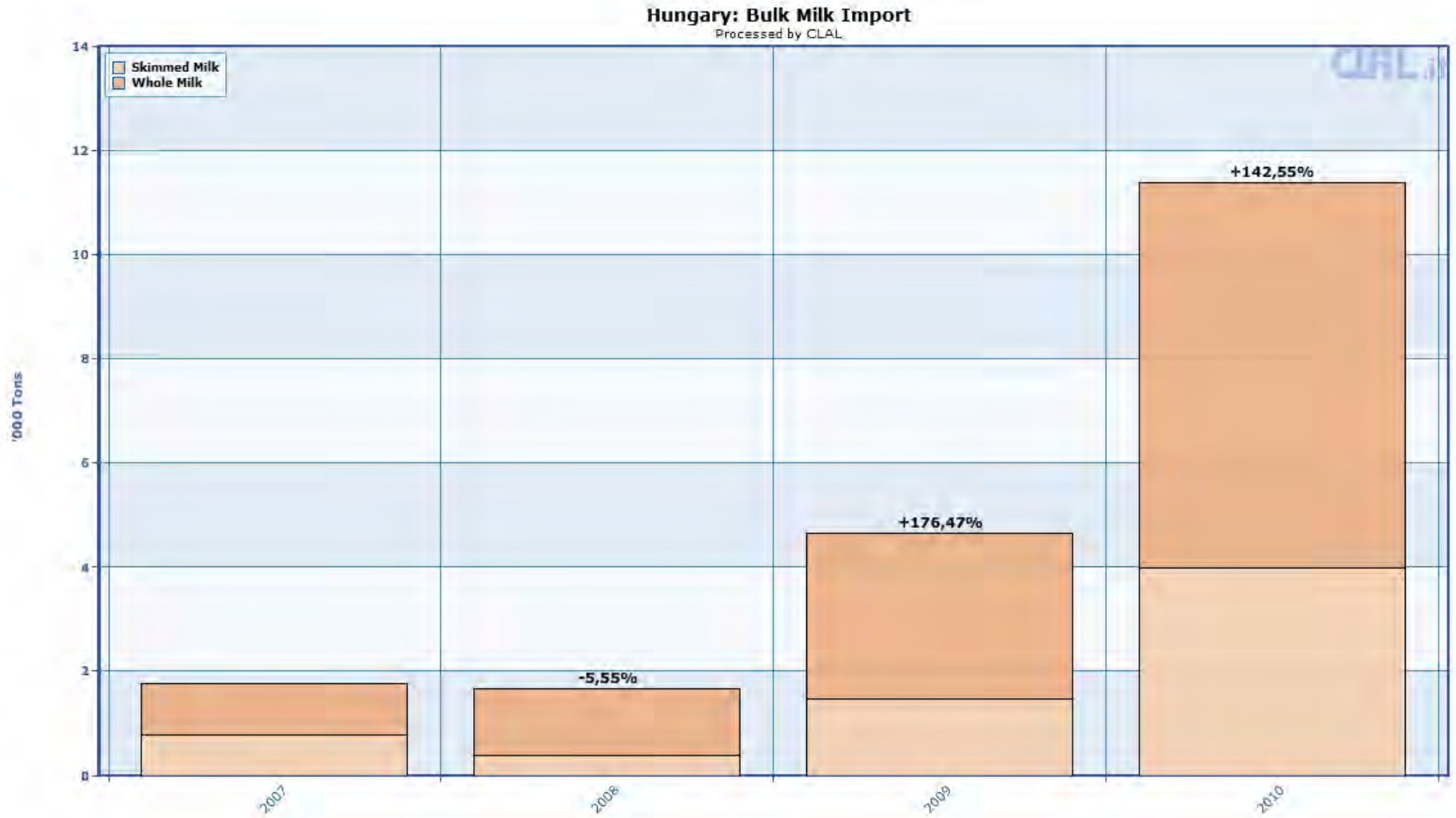
Processed by CLAL



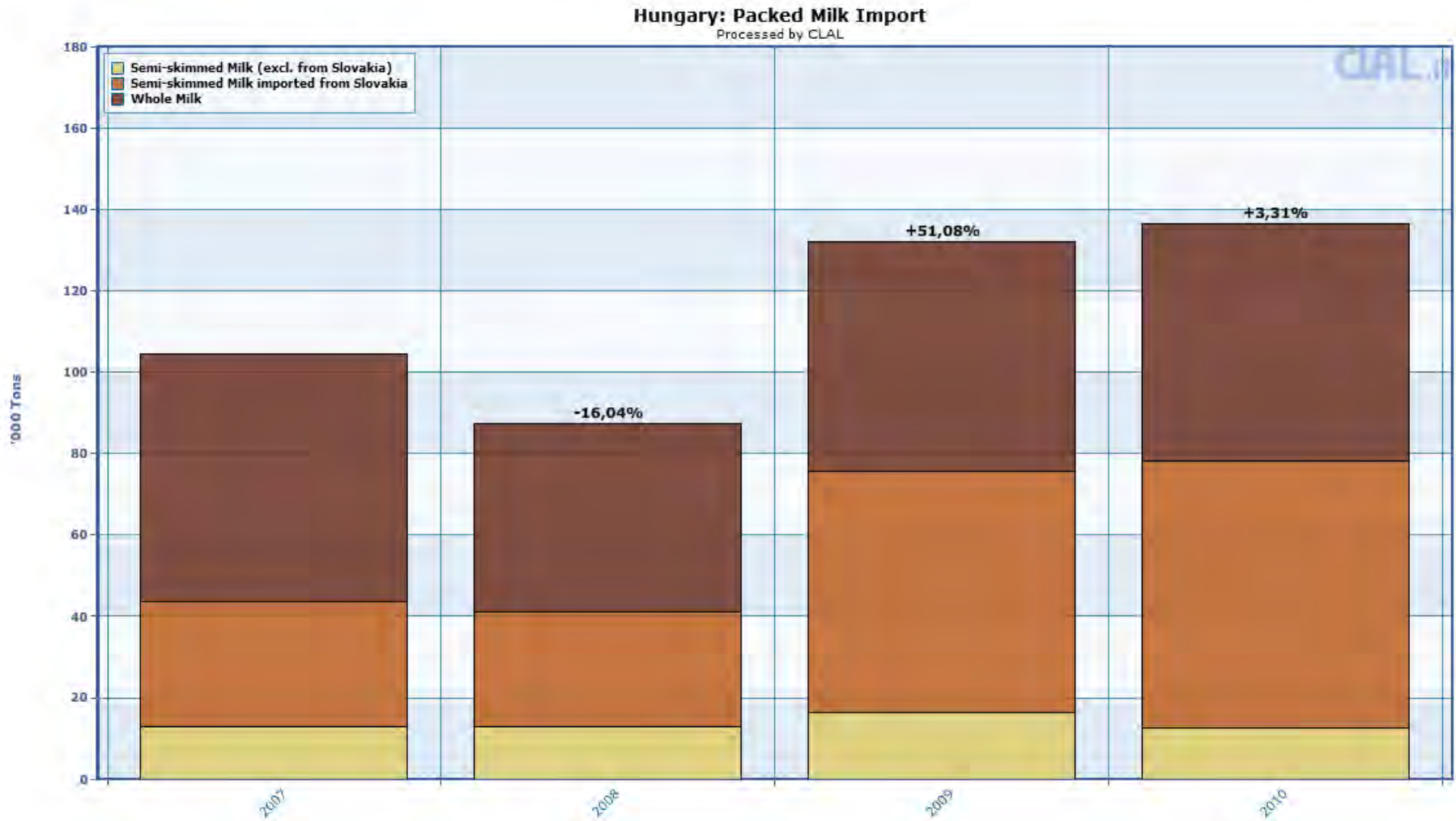
Hungary: Dairy Sector and focus on Import

	HUNGARY					
x 1.000 ton	2005	2006	2007	2008	2009	2010
IMPORT						
Bulk Milk (HS 04011090 + 04012099)	9,8	6,4	1,8	1,7	4,7	11,4
of which skimmed (HS 04011090)	0,0	0,2	0,8	0,4	1,5	4,0
of which whole (HS 04012099)	9,8	6,2	1,0	1,3	3,2	7,4
Packed Milk (HS 04012011 + 04012091) intra-extra UE	50,7	53,6	104,7	87,9	132,8	137,2
of which semi-skimmed (HS 04012011)	44,5	48,3	92	75	116	125
of which from Slovakia	17,6	26,3	30,8	28,4	60	66
<i>incidence</i>	39,6%	54,5%	33,6%	37,9%	51,2%	52,9%
of which whole (HS 04012091)	6,2	5,3	13,0	13,0	16,6	12,7
Fresh products (HS 040310-040390)	23,9	22,2	31,9	32,0	33,6	33,4
Cream (HS 04013039))				0,9	4,4	8,5
Butter <small>(HS 0405)</small>	3,6	4,7	4,8	3,7	4,5	5,8
Cheese <small>(HS 0406)</small>	22,0	31,2	37,5	32,8	33,4	40,7

Hungary: Bulk Milk Import

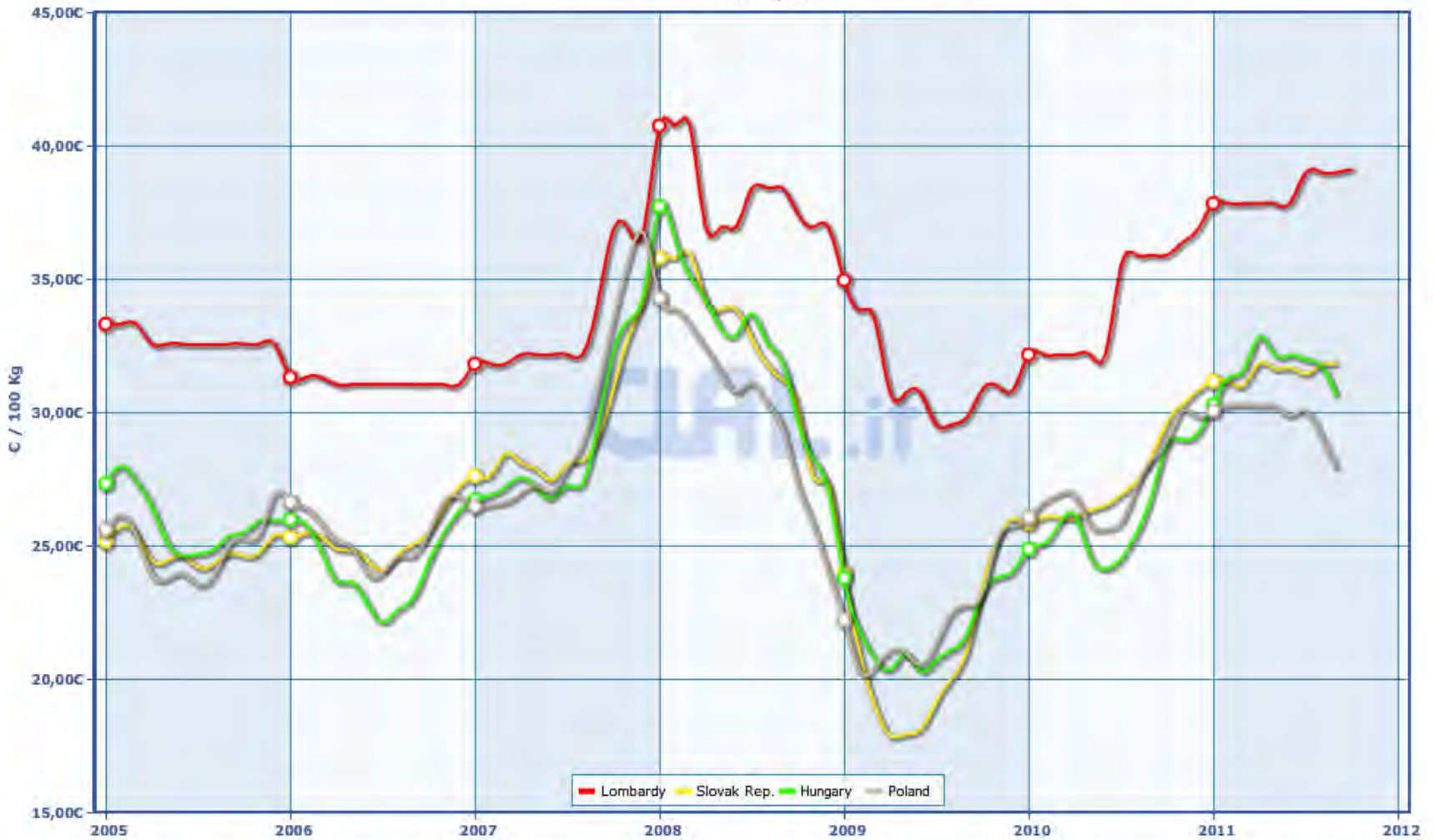


Hungary: Packed Milk Import



EU-27: Farm-gate Milk price

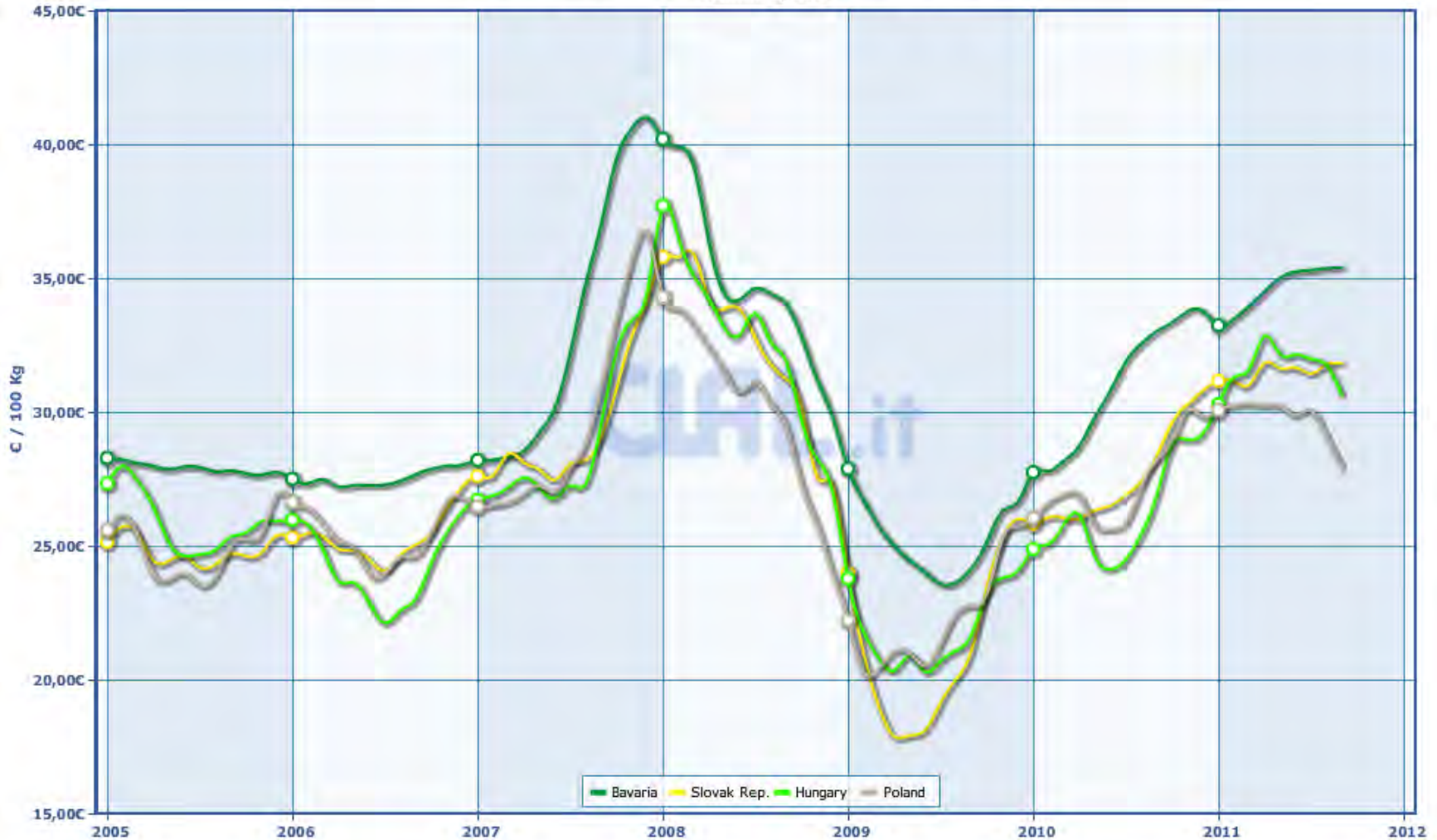
Lombardy, Hungary, Slovak Republic, Poland
Historical comparative overview on farm-gate raw milk prices
Processed by CLAL



EU-27: Farm-gate Milk price

Bavaria, Hungary, Slovak Republic, Poland
Historical comparative overview on farm-gate raw milk prices

Processed by CLAL



EU-27: Farm-gate Milk price

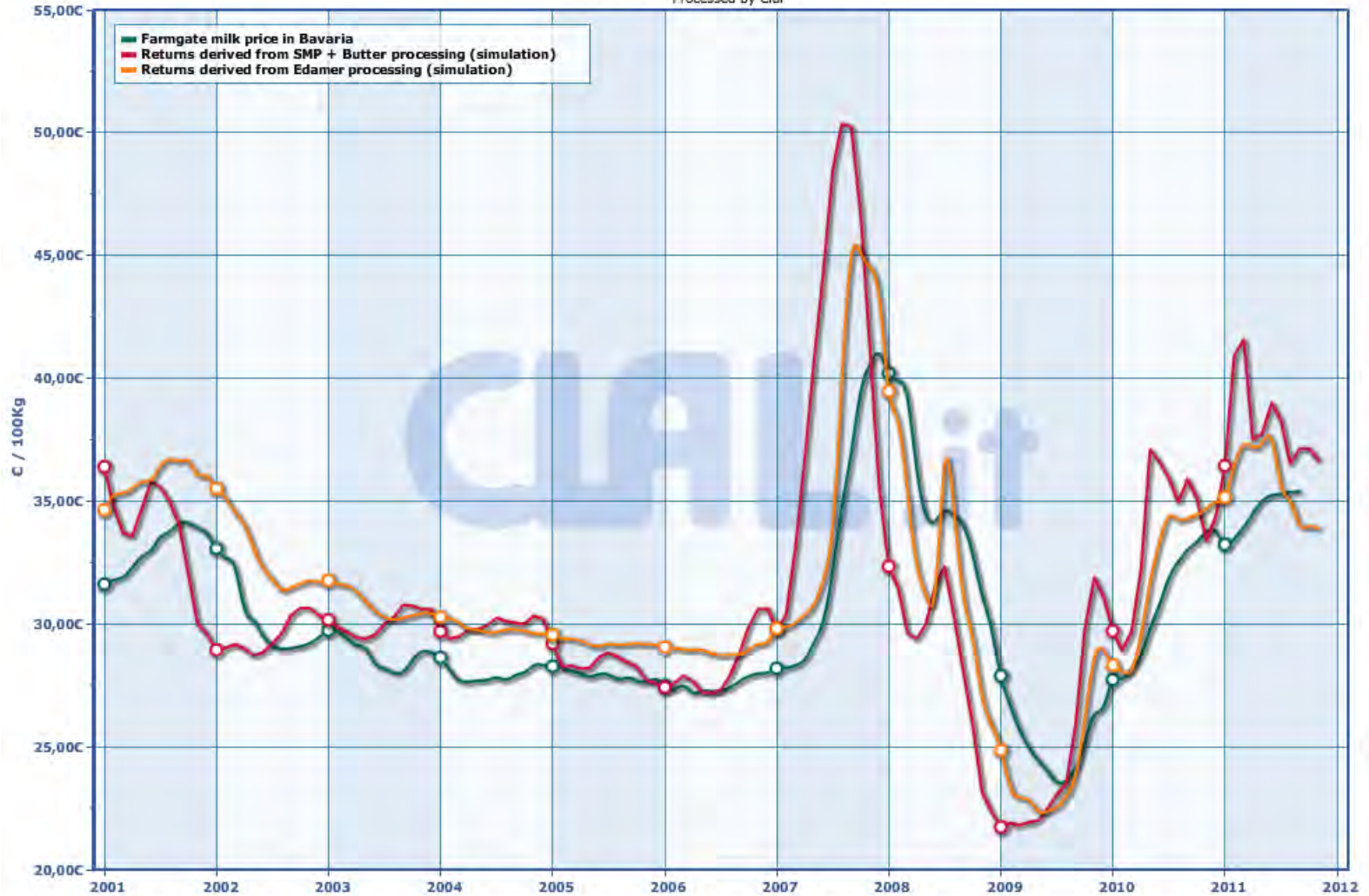
France, Hungary, Slovak Republic, Poland
Historical comparative overview on farm-gate raw milk prices
Processed by CLAL



Germany: Milk price and price simulation on dairy products

Comparison between farmgate milk price in Bavaria and return on SMP + Butter and Edamer

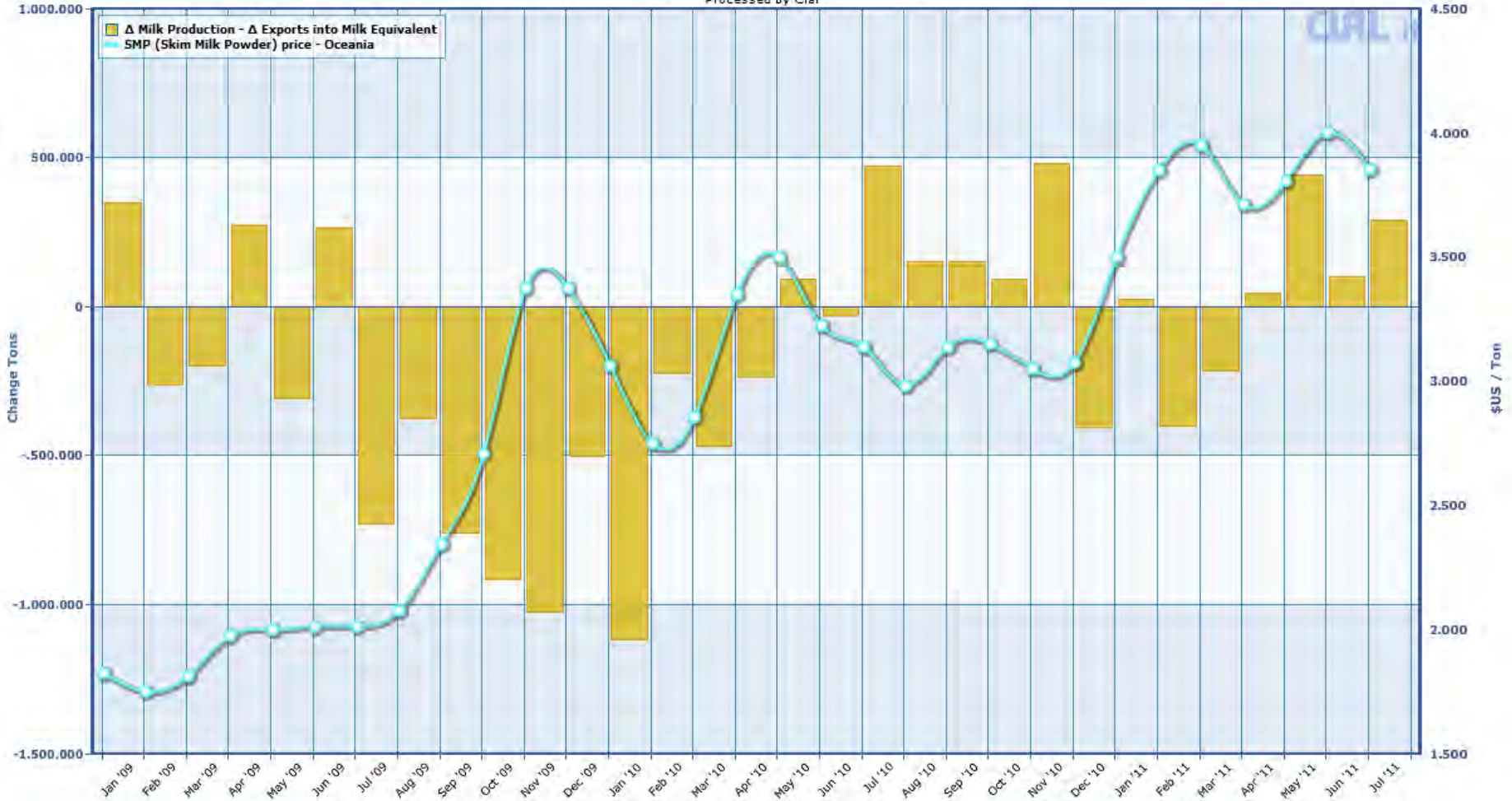
Processed by CIAL



World MILK Production and world Dairy Exports

Difference in quantity (Δ) between Milk Production (tons) and Dairy Products Exports converted in Milk Equivalent (tons)

Processed by CIAL



EU-27 MILK Production and Dairy Exports

EU-27: Difference in quantity (Δ) between Milk Production (tons) and Dairy Products Exports in Milk Equivalent (tons)

Processed by CLAL

