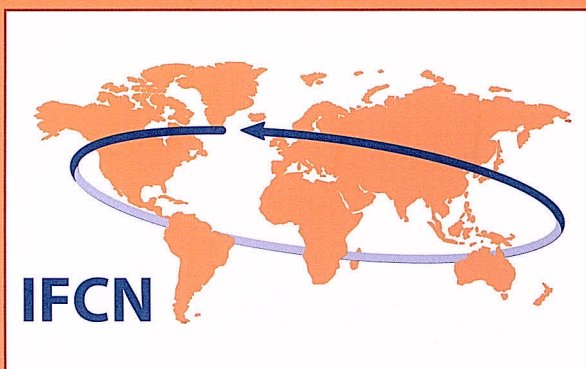




Dairy Report 2010

For a better
understanding of
milk production
world-wide



IFCN

International Farm
Comparison Network

3.71 Portugal – Milk production fact sheet

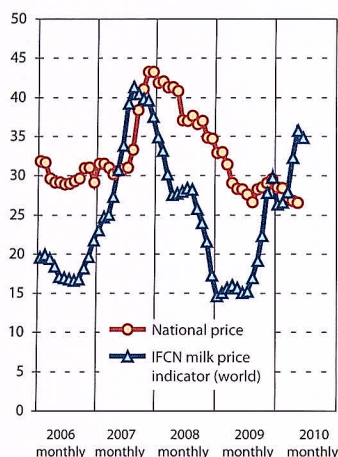


António Moitinho Rodrigues



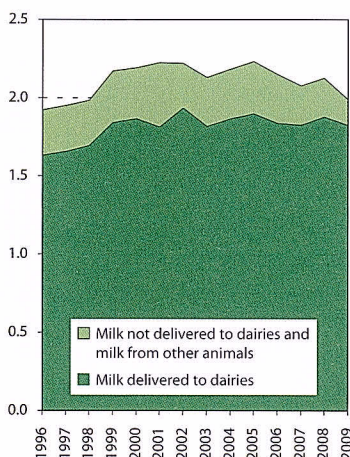
Farm gate milk prices

EUR / 100 kg milk (ECM)



Milk production

mill t milk (ECM)



DAIRY SECTOR AND CHAIN PROFILE

Status 2009

- Milk production (cows): 1.8 mill t
- Milk from other animals: 0.17 mill t
- Milk price: 55% above world market
- Milk consumption: 196 kg ME per capita and year
- Milk processing: 43% into tradable products
- Export: approx. 35% of production
- Import: approx. 38% of local consumption
- Self-sufficiency in milk: 96%

Milk equivalent calculation based on fat and protein only

Key developments 2005-2009

- Milk production (cows): -2.9 % per year
- Milk consumption per capita: -4.4 % per year
- Population: +0.3% per year
- Farmers' share in chain: declining

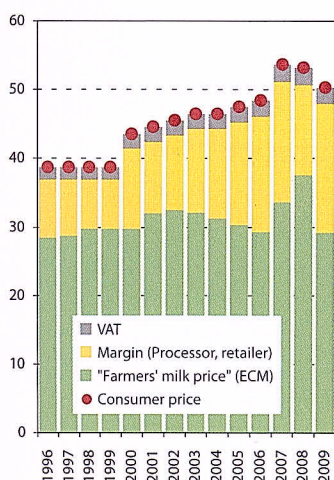
Key variables of the dairy sector

	1996	1998	2000	2002	2004	2005	2006	2007	2008	2009	annual change 2000-05 2005-09		
Milk production (cows)													
Production (mill t ECM)	1.73	1.79	2.00	2.04	2.00	2.05	1.97	1.90	1.95	1.82	0.5%	-2.9%	
Cows (in 1,000's)	376	372	355	341	338	324	307	306	301	295	-1.8%	-2.3%	
Milk yield (t/cow/year)	4.6	4.8	5.6	6.0	5.9	6.3	6.4	6.2	6.5	6.2	2.4%	-0.5%	
Milk consumption (from all dairy species)													
Consumption (mill t ECM)	1.91	1.93	2.22	2.45	2.32	2.47	2.39	2.37	2.39	2.09	2.1%	-4.1%	
Population (mill people)	10.0	10.1	10.2	10.3	10.5	10.5	10.6	10.6	10.6	10.6	0.6%	0.3%	
Consumption (kg milk/capita)	190	191	218	237	221	234	226	224	225	196	1.4%	-4.4%	
The dairy chain													
Milk delivered in %	85%	85%	85%	87%	85%	85%	85%	88%	88%	92%	0.0%	1.9%	
Margin in EUR / 100 kg milk	8.5	7.1	11.7	10.9	13.0	14.8	16.8	17.5	13.1	18.8	4.8%	6.1%	
Farmers' share of consumer price	73%	77%	68%	71%	67%	64%	60%	63%	71%	58%	-1.3%	-2.4%	

Illustration of the dairy chain

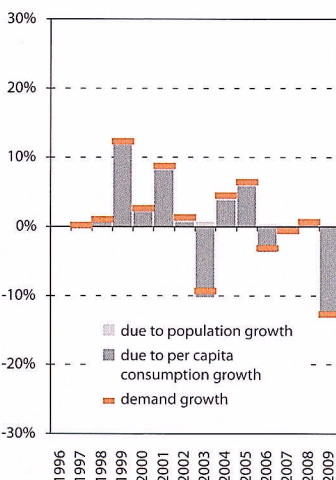
Consumer & farmers' prices

EUR / 100 kg milk



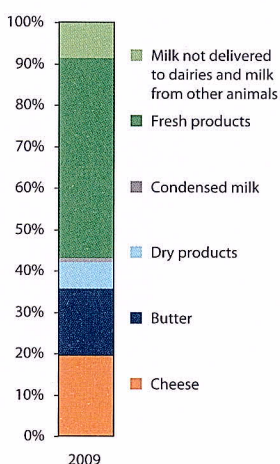
Milk demand driver

% annual change



Processing profile

% of milk produced

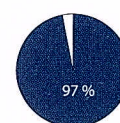


Milk processors list 2006

Milk intake in 1,000 tons (natural content)

Agros	619
Bel	247
Proleite	227
Lacticoop	206
Unicol	124
Unileite	124
Leicar	103
Danone	52
Parmalat	41
Renoldy	36

List covers approx. 97 % of milk delivered



Explanations

Sources: National statistics, FAO, AMI, IMF, CIRCA. 2010 data: preliminary and partly estimated. Other dairy species: Sheep and goat.

Method: See Chapter 3.9 for details. Consumer price for: UHT milk with 1.5% fat.

Estimates done for: Processing profile: Condensed milk 2009.

