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Taiwan

Dairy and Products

Annual

2004

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Report Highlights:

Stable consumer demand for fluid milk, private sector unfamiliarity with handling fluid milk, and consumer preference for fresh vs. UHT milk are likely to continue holding fluid milk imports below the TRQ allowed level of 21,298mt. Cheese promises to be the rising star in the dairy category for the coming several years as mild flavored products continue to be introduced into a wide range of foodservice applications and specialty cheeses gain niche audiences through producer country and retailer promotions. The United States remains a minor player in all dairy segments – with the important exception of whey and high value isolates. With increasingly competitive prices and more coordinated marketing and education, U.S. suppliers should have increasing mid-to-long term opportunities to expand their share of Taiwan's approximately 535 thousand metric ton annual demand for milk and dairy products.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Annual Report
Taipei [TW1]
[TW]

Executive Summary

The Taiwan dairy industry was established more than four decades ago, during an era when Taiwan emphasized food self-sufficiency and diet diversification. To support production, authorities subsidized it and erected high barriers to imports. Taiwan commitments to liberalize the market and permit imports in all dairy categories will continue to define market trends for the coming several years.

Cooler weather in dairy production areas allowed Taiwan to produce roughly the same amount of milk in 2002 and 2003, even with a slightly smaller herd than in prior years. Production is expected to resume shrinking by an average 2 ~ 4 percent annually over the coming several years, reflecting increased TRQ import volumes and variations in consumer and food processing needs.

Despite annual fluctuations in various categories, such as new to market products like whey and ingredient fungibles such as powdered milk, the future continues to be positive for continued slow and steady growth in per capita dairy consumption. Dairy product consumption will continue to expand, with consumers becoming more selective, particularly with regard to liquid milk products and growth opportunities in specialty dairy items (such as whey and whey protein concentration (WPC)) that add value/differentiation to processed food products already in the market.

The United States remains a minor player in Taiwan's overall dairy market, with most commodity products arriving from Australia and New Zealand, while higher-end and branded products are sourced globally. The United States, however, is the major supplier of whey due to competitive pricing and successful promotion efforts into hotel/restaurant/institutional (HRI) and processed food channels by U.S. exporters and the U.S. Dairy Export Council.

Production

Taiwan dairy producers continue to cut back gradually on dairy herd numbers (est. an average 3% decrease annually over the coming 5 year period). Good weather in producing areas during 2003 permitted a slight (1%) increase in output even with a smaller herd. The high comparative costs of production (roughly twice that of the U.S.) make it likely that local production will drop to a natural base of 330 thousand metric tons in the near future as imports expand to full tariff rate quota (TRQ) volumes. Taiwan's Council of Agriculture promotes locally produced milk through advertisements and quality marking.

Increased productivity continues to be realized largely through industry consolidation and better production management practices. Dairy producers receive few government subsidies and are under growing pressure from milk processors to improve business practices and lower costs.

Due to the semi-tropical climate in Taiwan's dairy regions, output tends to be highest during the cooler winter months (October through March). A 20 percent variation in production between winter and summer months is normal. Unfortunately for local fresh milk producers, consumption patterns for fresh milk run in reverse, with the annual consumption cycle peaking during the hot summer months (see "Marketing & Prices" section below).

Taiwan has 750 registered dairy farms, concentrated principally in the southeast of the island.

The half-dozen or so main processors of consumer-ready fresh milk and liquid milk products (household names such as Uni-President, Kuang Chuan, and Wei Chuan) outsource nearly all of their raw milk production to independent contract farms. Dairy farms directly owned and operated by processors are justified principally by public relations and marketing objectives.

A combination of economics, policies and consumer preference channels nearly all dairy output (nearly 90%) into consumer-ready fresh milk (including flavored milks and yogurt drinks). Of the remainder, local ice cream producers consume approximately 10% of raw milk supplies and producers of milk powder use less than 1%. Dairy products manufactured with local production are consumed domestically. Taiwan produces no other dairy products (cheese, whey, etc.) in commercially meaningful quantities.

Consumption

Dairy products are now firmly entrenched in the local diet. While the weak economy cut dairy consumption by just under 2 percent in 2002, total fluid milk consumption returned to its "normal" consumption level just above 380 thousand mt in 2003. Mild growth can be expected to continue over the coming several years. While some (<10%) milk powder is used in the local production of "fresh" milk (principally flavored / yogurt drinks, but also in certain "enhanced" fluid milks) the market is expected to continue shifting away from reconstituted milk powder in favor of fresh fluid milk.

Associated with a healthy and comfortable life-style, dairy products have gained significant market acceptance over the past decade. While the late 1980s saw fresh milk complete its transition from niche food product to standard grocery item, the 1990s saw an unprecedented proliferation in the availability of value-added dairy items including cheeses, yogurt products, dairy spreads, whipped cream, and dairy desserts. The first decade of the 21st century should see increasing acceptance of dairy products in local foods as flavoring atop steamed vegetables, baked with seafood, added to soups, served up in sandwiches, and dolloped over iced coffee.

While liquid white milk retail sales are holding steady or growing slightly, sales of flavored milk drinks and drinking yogurt should continue declining over the coming years. The increasing preference for fresh milk and overall negative growth in demand for HRI ingredients has cut demand for powdered milk. These trends are expected to continue into 2005. Rising whey demand continues to make this the most promising sector for near term growth, although supply problems (limited supply, higher costs) dented sales in 2003 and are expected to continue causing problems in 2004. Whey is currently viewed as a supplement or replacement for milk and other ingredients. As such, the price of whey vis a vis alternatives impact strongly on sales in any given year. Growing awareness and interest in whey and isolates are largely a result of successful promotion efforts for them as ingredient substitutes and additives.

Cheese continues to make headway as a "new" product into the traditional prepared food market. Cheese sales are expected to continue to grow at more than 10% growth per year. Between 2003 and 2005 alone, cheese demand is expected to increase 33%. Cheese promises to continue increasing market volume through growing direct consumption and through innovative applications. It has gradually worked its way from an early position as a "foreign" flavor into a welcome flavor additive for a broad range of processed and fresh-served products. While processed cheeses are still most prevalent, mild-flavored fresh cheeses such as mozzarella, Gouda, and even Parmesan are now increasingly used as flavoring for many traditional and fusion dishes. Whey, also a newcomer to Taiwan's food processing industry, seems to be earning acceptance as a cost competitive replacement for

other ingredients in processed food applications. The relatively low per capita consumption of cheese and whey has helped insulate these products from negative economic pressures while encouraging continued expanded use in new products.

Baked cheese dishes, both Western (e.g., lasagna) and Asian/Western fusion (e.g., creamy seafood concoctions), represent an important foodservice trend that continues to remain highly popular. This trend on its own is expected to account for approximately one half of the increase in Taiwan's consumption of cheese (mozzarella, mild cheddar, gouda, processed) this year.

Market Profile

Despite increasing product diversity, dairy consumption in Taiwan still lags behind other high income Asian economies -- where dairy products already enjoy broad acceptance in local diets. Using benchmark research conducted in 1998, it is estimated that Taiwanese (in 2002) spent US\$240 (NT\$8,200) per capita on dairy items – representing some 11 kg per person. Japan, a market to which Taiwan frequently looks for consumer and food trends, still consumes more than 3 times this amount per capita of dairy products. This highlights both the relatively shallow level of dairy product penetration in Taiwan and the substantial potential for growth.

Customer Segmentation

The dairy products market is segmented into two major consumer groups. The first group buys and consumes dairy products such as milk, cheese, and yogurt both for nutritional and health reasons. The second buys dairy products based on quality perceptions, status considerations, and/or curiosity. These two groups have different expectations regarding dairy products and may best be approached differently in terms of marketing and sales work.

- **The Nutrition-Focused Consumer**

Taiwan consumers appreciate the nutritional benefits of consuming dairy products. The relatively limited product expectations, beyond nutrition, of nutrition-focused consumers make this group highly influenced by price and convenience when making purchase decisions. Children are the largest nutrition-focused consumer segment for dairy items such as processed cheese, yogurt drinks, fresh milk, powdered milk, and puddings. The elderly are prime consumers of nutritionally enhanced milk powders.

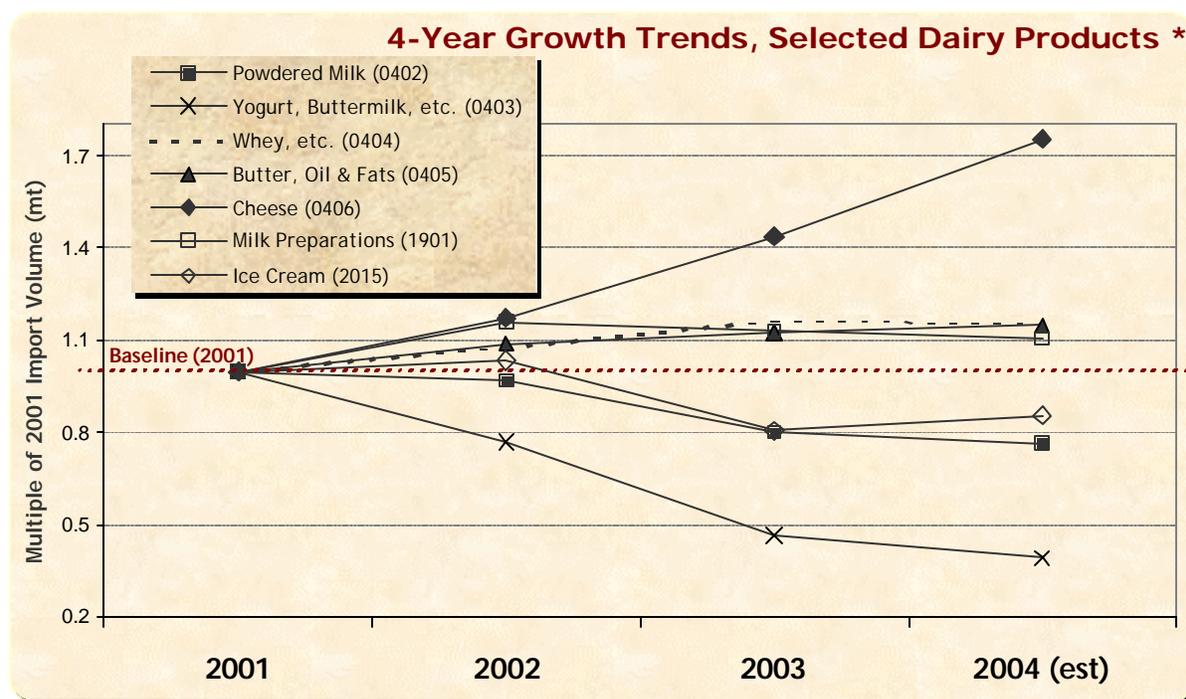
- **The Quality Buyer**

With a large (often Western-educated) middle class, high average income level, and a desire to become more cosmopolitan, urban Taiwan has increasingly embraced Western cuisine and food trends. Dairy products are an important component of this trend. Middle and upper class consumers tend to make food (including dairy product) purchase decisions based upon factors beyond cost and convenience. These include product and packaging appearance, quality and taste perceptions, recommendations from others, features or recipe write-ups in the news media, and so on. Also, a significant percentage of chefs now in the better Western restaurants and hotels are trained abroad – often in Europe. They specify high-quality ingredients and brand names with which they are familiar when preparing food. Some of the better bakery chains as well also employ master bakers trained abroad.

Trade

Highly competitive prices and long-running coordinated promotion by dairy suppliers from major exporting nations such as New Zealand and Australia have generally made the going tough for U.S. suppliers who are often able to get better prices (particularly for commodity dairy products) in their home market. This intense competition runs from commodity dairy products where the antipodes have the largest market share to high-end dairy products where Europe dominates. U.S. suppliers are not expected to gain significant ground in the general dairy market given these conditions. However, given recent reported instability in supply from Europe, rising overall prices, and changing conditions in the United States with respect to dairy prices, U.S. suppliers should experience some opportunities in particular product areas, such as cheese and whey.

The current structure of trade for major commodity categories, such as fluid and powdered milk, should be little affected by lower dollar-denominated prices stemming from the weaker U.S. dollar. Importers are, however, giving greater attention to U.S. cheese suppliers (and other important niche categories, such as ice cream, whey, and dairy ingredients) because of increasingly attractive U.S. supplier prices.



* Due to chart space restrictions, three categories which experienced exceptionally high growth during the survey period, sweetened condensed / evaporated milk (72.9x), ice cream powder (7.5x) and fluid milk (4.6x), have not been included.

Tariff Rate Quota (TRQ) Administration: Taiwan's 21,298mt TRQ for fluid milk in 2004 represented the final increase in that TRQ required by Taiwan's World Trade Organization (WTO) accession agreement. Taiwan administers TRQs under "System 2" rules, under which import rights are auctioned once a year. All importers and exporters registered with Taiwan's Board of Foreign Trade (BOFT) are eligible to bid on quota rights. There are no performance bonds and quota rights go to the highest bidder. For liquid milk, the minimum lot size is 250 mt, with a maximum of 4,259. The liquid milk quota in 2003 reached 5,400mt, approximately 1/3 of that available. While subscriptions to the TRQ are up more than 50% this year, the full TRQ volume of 21,298mt will not likely be reached by year's end.

Special Safeguard (SSG) Protection: WTO rules also allow Taiwan to impose an additional SSG assessment, above and beyond any tariff bindings on imports of most fluid dairy products. This can occur either when either the CIF price of an item falls below a benchmark floor price (based on a 1990-1992 historical domestic "farm gate" price) or when total import volumes exceed a certain trigger level (based on recent import volumes). Taiwan has already notified the WTO of its intention to impose SSG's although it has not said when it may act. The SSG would add 33 percent to tariff bindings (e.g., a 10 percent duty would rise to 13 percent). Imports under TRQ are not subject to special safeguards.

Products Affected by SSGs (by HS Code)

HS Code	Description
04011000 / 2000 / 3000	Fresh and Longlife Milk (excluding that of goats & sheep)
04029910	Fresh milk containing sugar or other sweeteners
04029920	Evaporated or sterilized milk, containing sugar or other sweeteners
04029990	Other milk, containing sugar or other sweeteners
04039090	Other buttermilk (not fresh, not condensed, not dry) *
04039090	Various minor categories of modified, flavored, or fermented milk and cream *
040390901	Curdled milk

* note: Yogurt; fresh, dried, & condensed buttermilk; sour cream; fermented sour milk; and yeast / fermented milk powders are *not* eligible for SSG protection.

The U.S. is a major producer and exporter of whey and whey protein concentrate and other extracts and so enjoys a competitive advantage in these niches. The success of initial promotion efforts targeting food processors indicates strong potential for whey as an ingredient in Taiwan's large food processing industry. Strong demand growth is projected through the foreseeable future.

At present, Taiwan permits most value-added milk products onto the island subject to payment of tariffs and compliance with sanitary requirements. Infant milk formulas, however must be approved by the Department of Health.

Projecting forward, Taiwan's fluid milk import volumes are likely to remain in the 10~15,000mt range for the next several years.

Dairy and the WTO

Taiwan acceded to the World Trade Organization (WTO) on January 1, 2002. In addition to reduction in tariffs for most dairy products, Taiwan now operates a process to allocate import quotas for products entering under TRQs.

In general, the bulk of gains from tariff reductions and greater market access for imports should be passed directly to consumers through lower prices and increased product selection.

Import Tariffs for Dairy Products

Tariff Schedule	Description	Tariff
various (under 0401)	Fresh & longlife cow milk & cream, unsweetened w/ fat <6%	15 / TRQ
various (under 0401)	Fresh & longlife cow milk & cream, unsweetened w/ fat >6%	15 / TRQ
various (under 0401)	Fresh & longlife goat / sheep milk & cream, unsweetened	20
various (under 0402)	Cow/goat/sheep milk in powder, granule, or block form for human consumption	12
04029110	Condensed milk, unsweetened	20
04029120	Evaporated or sterilized milk, unsweetened	20
04029190	"other" milk or cream, unsweetened	20
04029910	fresh or condensed milk, sweetened	50 / TRQ
04029920	evaporated or sterilized milk, sweetened	15 / TRQ
04029990	milk or cream, neither concentrated nor condensed, sweetened	24
04039010	buttermilk, dry powder	12
04031000	yoghurt	15
04039090	buttermilk, sour milk, fermented milk	20
04039090924	buttermilk, n.e.s. (liquid, concentrated, evaporated)	15 / TRQ
04039090942	curdled milk or cream, kephir, other fermented or oracified milk or cream n.e.s.	15 / TRQ
04041090	whey & modified whey, whether concentrated or not	5
04049000	other products containing milk or milk constituents	27.5
04050010	Butter	5
04059010	de-watered milkfat	8
04061000	fresh cheese, including whey cheese and curd	5
04062 / 3 / 4000	grated / powdered cheese, processed cheese, blue-veined cheese	5
18069010	ice cream powder	5
19011000	infant milk powder, retail packaged	5
19019023	evaporated or sterilized milk, prepared	25
19019027	flavored milk	15 / TRQ
21050010	ice cream	10
35029000	Whey Protein Concentrate	5

- Tariff Rate Quota (TRQ) indicates that product is permitted under a "normal" tariff up to a certain annual quota volume, at which point a "prohibitive" tariff will be administered on any additional imported quantities.
- All tariffs noted are "final" WTO tariffs.

Competition

At present, U.S. products and brands are relatively well represented only in the ice cream and infant formula segments. Key European, Australasian, and Japanese brands that have sold into the market for many years have much higher brand recognition. To gain market share, U.S. suppliers will need to increase consumer awareness.

Key Dairy Product Segments and Principal Supplier Countries

Product	8/2003 ~ 7/2004 imports (US\$)	Country 1 (import share)	Country 2 (import share)	Country 3 (import share)
milk & cream (0401)	11,481,347	N. Zealand (38%)	France (33%)	Australia (22%)
milk & cream (powder, conc.)	100,101,988	N. Zealand (50%)	Australia (33%)	Denmark (4%)
yogurt	416,798	Germany (51%)	France (16%)	N. Zealand (12%)
whey (04041090)	9,630,856	US (60%)	Australia (10%)	Germany (9%)
butter	19,658,295	N. Zealand (58%)	Australia (14%)	France (7%)
cheese & curd (0406)	44,846,520	N. Zealand (37%)	Australia (36%)	US (9%)
processed cheese (040630) - subcategory of cheese & curd	13,927,641	N. Zealand (48%)	Australia (28%)	Japan (9%)
infant formula milk powder	48,713,507	Neth. (28%)	Ireland (16%)	N. Zealand (12%)
ice cream	8,106,184	France (54%)	Thailand (9%)	Japan (9%)

The potential of China to supply competitive milk and dairy products into the market is small through the foreseeable future. WTO terms anticipate that member states permit all WTO members equal access, subject to phytosanitary, safety, and other requirements. The political freeze across the Taiwan Strait poses formidable problems for traders seeking to resolve technical issues, which will seriously impede trade. While unlikely to pose a threat to higher value-added product segments, continuing investment flows into China from Taiwan may eventually help develop the former as an effective exporter to Taiwan.

In May 2003, Taiwan announced the lifting of import restrictions for one value-added dairy product from China, sweetened condensed milk (HS Code 0402-9940-008). The overall impact will be small (Taiwan imported 80mt of sweetened condensed from China in 2003 and looks set to bring in around 450mt in 2004), but the opening of this category to importation is expected to provide Taiwanese suppliers an initial opportunity to evaluate Mainland Chinese value-added dairy products, with the potential for the opening of further value-added categories in the coming several years.

MARKETING & PRICES

Marketing

Dairy has a limited history in Taiwan's diet. Therefore, market demand for and perceptions regarding dairy products are grounded in marketing messages and other information received from dairy producing countries and suppliers.

Two elements that have proven successful for exporters of dairy products to Taiwan include:

- **Actively Support Importer / Distributor Initiatives**

For Taiwan distributors of dairy products, effective public relations and active consumer promotion are considered critical to marketing and sales success. Therefore, U.S. suppliers are encouraged to develop a responsive and supportive relationship with importers and distributors to ensure product messages and information are delivered effectively to target consumers.

U.S. suppliers have expanded sales of ice cream, infant formula, and processed cheese largely by supporting the development of product image and customer loyalty. A major U.S. ice cream brand is promoted as a premium product and maintains a strong public relations

program by targeting the media and retailers. One U.S. infant formula retailer promotes a comprehensive "mother care" program for expecting and new mothers and retains a consulting staff of doctors and nutritionists for public relations and promotional work. U.S. suppliers of processed cheeses have successfully plugged into Taiwan's fast food industry by leveraging existing supplier relationships with parent franchises in the United States (such as Pizza Hut, Dominos, Burger King, and McDonald's).

• **Tailor Product Offering to Customer Tastes and Preferences**

In Taiwan, processed cheese is widely accepted as a "nutritional supplement" and is often consumed for perceived health benefits. To service this important market segment, suppliers such as Cheesedale (Australia) and Anchor (New Zealand) have introduced processed cheese slices enhanced with garlic, pineapple, smoked, and other flavors. Several Japanese brands go farther – marketing delicately packaged and highly priced processed cheese products in such flavors as seaweed, fish, and green mustard (wasabi). While sales of such Japanese products are relatively small, their attractive packaging and unique flavors support retail prices (by weight) of 2~5 times that of "ordinary" processed cheese.

Smaller size packaging for products requiring refrigeration is still preferred because of the limited capacity of home refrigerators.

Taiwan's relatively advanced food processing and baking industries should be targeted for dairy ingredient sales, particularly in high value categories such as whey, whey protein concentrate, and other milk derivatives and nutraceuticals.

Prices

Milk's position as a "warm weather" beverage in the minds of many consumers results in sharply high consumption during the summer months. Discounting and promotions are heavily used both to maximize sales volume during peak consumption months and spur slow winter sales. During the winter, which runs from approximately November through April, discounting can cut up to 50% off retail prices.

Grocery stores and hypermarkets frequently make special offers on dairy products. Products are often bundled together and offered at a single, often discounted, price. Such bundling may include two or more of the same item (of equal or different sizes), two or more different products (milk packaged together with soy milk), or a promotional item (e.g., stickers with processed cheese or plastic tumbler with powdered milk).

Convenience stores rarely offer bundled products and only infrequently discount retail prices for their dairy products.

Statistics

Fluid Milk

Country Commodity	Taiwan		2004		(1000 HEAD)(1000 MT)		UOM
	2003	Revised	2004	Estimate	2005	Forecast	
Market Year Begin	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	MM/YYYY
		01/2003		01/2004		01/2005	
Cows In Milk	60	60	55	57	0	57	(1000 HEAD)
Cows Milk Production	335	354	325	350	0	348	(1000 MT)
Other Milk Production	28	22	28	24	0	22	(1000 MT)
TOTAL Production	363	376	353	374	0	370	(1000 MT)
Intra EC Imports	0	0	0	0	0	0	(1000 MT)
Total Imports	16	9	27	12	0	16	(1000 MT)
TOTAL Imports	16	9	27	12	0	16	(1000 MT)
TOTAL SUPPLY	379	385	380	386	0	386	(1000 MT)
Intra EC Exports	0	0	0	0	0	0	(1000 MT)
Total Exports	0	0	0	0	0	0	(1000 MT)
TOTAL Exports	0	0	0	0	0	0	(1000 MT)
Fluid Use Dom. Consum.	340	345	341	347	0	349	(1000 MT)
Factory Use Consum.	39	40	39	39	0	37	(1000 MT)
Feed Use Dom. Consum.	0	0	0	0	0	0	(1000 MT)
TOTAL Dom. Consumption	379	385	380	386	0	386	(1000 MT)
TOTAL DISTRIBUTION	379	385	380	386	0	386	(1000 MT)
Calendar Yr. Imp. from U.S.	1	0	3	0	0	1	(1000 MT)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	(1000 MT)

Import Trade Matrix

Country	Taiwan	
Commodity	Dairy, Milk, Fluid	
Time Period	2002-2003	Units: mt
Imports for:	2002	2003
U.S.	0	0
Others	Others	
Australia	1732	3469
New Zealand	1394	3086
France	2137	2172
Denmark	234	281
Belgium	875	116
Total for Others	6372	9124
Others not Listed	130	148
Grand Total	6502	9272

Export Trade Matrix

Country	Taiwan	
Commodity	Dairy, Milk, Fluid	
Time Period	2002-2003	Units: mt
Exports for:	2002	2003
U.S.	0	0
Others	Others	
Total for Others	0	0
Others not Listed	0	0
Grand Total	0	0

Whole Milk Powder

Country Commodity	Taiwan Dairy, Dry Whole Milk Powder (1000 MT)						
	2003 USDA Official [Old]	Revised Post Estimate [New]	2004 USDA Official [Old]	Estimate Post Estimate [New]	2005 USDA Official [Old]	Forecast Post Estimate [New]	UOM
Market Year Begin	01/2003		01/2004		01/2005		MM/YYYY
Beginning Stocks	0	0	0	0	0	0	0 (1000 MT)
Production	6	7	6	6	0	6	6 (1000 MT)
Intra EC Imports	0	0	0	0	0	0	0 (1000 MT)
Total Imports	31	27	30	28	0	28	28 (1000 MT)
TOTAL Imports	31	27	30	28	0	28	28 (1000 MT)
TOTAL SUPPLY	37	34	36	34	0	34	34 (1000 MT)
Intra EC Exports	0	0	0	0	0	0	0 (1000 MT)
Total Exports	0	0	0	0	0	0	0 (1000 MT)
TOTAL Exports	0	0	0	0	0	0	0 (1000 MT)
Human Dom. Consumption	37	34	36	34	0	34	34 (1000 MT)
Other Use, Losses	0	0	0	0	0	0	0 (1000 MT)
Total Dom. Consumption	37	34	36	34	0	34	34 (1000 MT)
TOTAL Use	37	34	36	34	0	34	34 (1000 MT)
Ending Stocks	0	0	0	0	0	0	0 (1000 MT)
TOTAL DISTRIBUTION	37	34	36	34	0	34	34 (1000 MT)
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	0 (1000 MT)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	0 (1000 MT)

Import Trade Matrix

Country	Taiwan	
Commodity	Dairy, Whole Milk Pwdr	
Time Period	2002-2003	Units: mt
Imports for:	2002	2003
U.S.	0	0
Others	Others	Others
New Zealand	17998	15708
Australia	8967	8201
Ireland	523	1455
Belgium	600	673
U.K.	869	298
Argentina	213	243
France	168	241
Total for Others	29338	26819
Others not Listed	325	186
Grand Total	29663	27005

Export Trade Matrix

Country	Taiwan	
Commodity	Dairy, Whole Milk Pwdr	
Time Period	2002-2003	Units: mt
Exports for:	2002	2003
U.S.	0	0
Others	Others	Others
Total for Others	0	0
Others not Listed	0	0
Grand Total	0	0

Nonfat Milk Powder

Country
Commodity

Taiwan
Dairy, Milk, Nonfat Dry

(1000 MT)

	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin	01/2003		01/2004		01/2005		MM/YYYY
Beginning Stocks	0	0	0	0	0	0	0 (1000 MT)
Production	0	0	0	0	0	0	0 (1000 MT)
Intra EC Imports	0	0	0	0	0	0	0 (1000 MT)
Total Imports	28	23	27	17	0	15	15 (1000 MT)
TOTAL Imports	28	23	27	17	0	15	15 (1000 MT)
TOTAL SUPPLY	28	23	27	17	0	15	15 (1000 MT)
Intra EC Exports	0	0	0	0	0	0	0 (1000 MT)
Total Exports	0	0	0	0	0	0	0 (1000 MT)
TOTAL Exports	0	0	0	0	0	0	0 (1000 MT)
Human Dom. Consumption	28	23	27	17	0	15	15 (1000 MT)
Other Use, Losses	0	0	0	0	0	0	0 (1000 MT)
Total Dom. Consumption	28	23	27	17	0	15	15 (1000 MT)
TOTAL Use	28	23	27	17	0	15	15 (1000 MT)
Ending Stocks	0	0	0	0	0	0	0 (1000 MT)
TOTAL DISTRIBUTION	28	23	27	17	0	15	15 (1000 MT)
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	0 (1000 MT)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	0 (1000 MT)

Import Trade Matrix

Country	Taiwan	
Commodity	Dairy, Milk, Nonfat Dry	
Time Period	2002-2003	Units: mt
Imports for:	2002	2003
U.S.	0.4	50.4
Others		
New Zealand	11714	9605
Australia	10165	8518
Denmark	7020	3490
Ireland	136	543
France	390	236
Total for Others	29425	22392
Others not Listed	1086.2	458
Grand Total	30511.6	22900.4

Export Trade Matrix

Country	Taiwan	
Commodity	Dairy, Milk, Nonfat Dry	
Time Period	2002-2003	Units: mt
Exports for:	2002	2003
U.S.	0	0
Others		
Total for Others	0	0
Others not Listed	0	0
Grand Total	0	0

Dried Whey

Country
Commodity

Taiwan
Dairy, Dried Whey

(1000 MT)

Market Year Begin	2003		2004		2005		Forecast	UOM
	USDA Official	Post Estimate	USDA Official	Post Estimate	USDA Official	Post Estimate		
	[Old]	[New]	[Old]	[New]	[Old]	[New]		
		01/2003		01/2004		01/2005		MM/YYYY
Beginning Stocks	0	0	0	0	0	0	0	(1000 MT)
Production	0	0	0	0	0	0	0	(1000 MT)
Intra EC Imports	0	0	0	0	0	0	0	(1000 MT)
Total Imports	0	20	0	19	0	22	22	(1000 MT)
TOTAL Imports	0	20	0	19	0	22	22	(1000 MT)
TOTAL SUPPLY	0	20	0	19	0	22	22	(1000 MT)
Intra EC Exports	0	0	0	0	0	0	0	(1000 MT)
Total Exports	0	0	0	0	0	0	0	(1000 MT)
TOTAL Exports	0	0	0	0	0	0	0	(1000 MT)
Human Dom. Consumption	0	20	0	19	0	22	22	(1000 MT)
Other Use, Losses	0	0	0	0	0	0	0	(1000 MT)
Total Dom. Consumption	0	20	0	19	0	22	22	(1000 MT)
TOTAL Use	0	20	0	19	0	22	22	(1000 MT)
Ending Stocks	0	0	0	0	0	0	0	(1000 MT)
TOTAL DISTRIBUTION	0	20	0	19	0	22	22	(1000 MT)
Calendar Yr. Imp. from U.S.	0	14	0	14	0	17	17	(1000 MT)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	0	(1000 MT)

Import Trade Matrix

Country Taiwan
Commodity Dairy, Dried Whey

Time Period Units:
Imports for:
U.S. U.S.
Others Others

Australia	3296	2422
Germany	943	1234
France	686	712
Poland	436	394
Netherlands	703	302
Canada	256	264
Belgium	0	184
Total for Others	6320	5512
Others not Listed	<input type="text" value="429"/>	<input type="text" value="151"/>
Grand Total	18296	19723

Export Trade Matrix

Country Taiwan
Commodity Dairy, Dried Whey

Time Period Units:
Exports for:
U.S. U.S.
Others Others

Japan	0.5	0
Singapore	0.3	0
Total for Others	0.8	0
Others not Listed	<input type="text" value=""/>	<input type="text" value="0"/>
Grand Total	0.8	0

Cheese

Country
Commodity

Taiwan
Dairy, Cheese

Market Year Begin	2003		2004		2005		Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]		
	01/2003		01/2004		01/2005			
Beginning Stocks	0	0	0	0	0	0	0	(1000 MT)
Production	0	0	0	0	0	0	0	(1000 MT)
Intra EC Imports	0	0	0	0	0	0	0	(1000 MT)
Total Imports	0	14	0	19	0	21	21	(1000 MT)
TOTAL Imports	0	14	0	19	0	21	21	(1000 MT)
TOTAL SUPPLY	0	14	0	19	0	21	21	(1000 MT)
Intra EC Exports	0	0	0	0	0	0	0	(1000 MT)
Total Exports	0	1	0	1	0	1	1	(1000 MT)
TOTAL Exports	0	1	0	1	0	1	1	(1000 MT)
Human Dom. Consumption	0	13	0	18	0	20	20	(1000 MT)
Other Use, Losses	0	0	0	0	0	0	0	(1000 MT)
Total Dom. Consumption	0	13	0	18	0	20	20	(1000 MT)
TOTAL Use	0	14	0	19	0	21	21	(1000 MT)
Ending Stocks	0	0	0	0	0	0	0	(1000 MT)
TOTAL DISTRIBUTION	0	14	0	19	0	21	21	(1000 MT)
Calendar Yr. Imp. from U.S.	0	1	0	1	0	1	1	(1000 MT)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	0	(1000 MT)

Import Trade Matrix

Country	Taiwan	
Commodity	Dairy, Cheese	
Time Period	2002-2003	Units: mt
Imports for:	2002	2003
U.S.	652	856
Others	Others	
New Zealand	5639	6133
Australia	3745	5194
Italy	211	254
Netherlands	210	253
U.K.	0	182
Brazil	173	145
Japan	83	129
Denmark	123	119
Total for Others	10184	12409
Others not Listed	272	307
Grand Total	11108	13572

Export Trade Matrix

Country	Taiwan	
Commodity	Dairy, Cheese	
Time Period	2002-2003	Units: mt
Exports for:	2002	2003
U.S.	0.5	1.1
Others	Others	
Singapore	0.7	0.2
Total for Others	0.7	0.2
Others not Listed	0	0
Grand Total	1.2	1.3

Butter

Country
CommodityTaiwan
Dairy, Butter

Market Year Begin	2003		2004		2005		Forecast	UOM
	Revised	Estimate	Estimate	Estimate	Estimate	Estimate		
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]		
	01/2003		01/2004		01/2005		MM/YYYY	
Beginning Stocks	0	0	0	0	0	0	0	(1000 MT)
Production	0	0	0	0	0	0	0	(1000 MT)
Intra EC Imports	0	0	0	0	0	0	0	(1000 MT)
Total Imports	12	12	12	12	0	13	13	(1000 MT)
TOTAL Imports	12	12	12	12	0	13	13	(1000 MT)
TOTAL SUPPLY	12	12	12	12	0	13	13	(1000 MT)
Intra EC Exports	0	0	0	0	0	0	0	(1000 MT)
Total Exports	0	0	0	0	0	0	0	(1000 MT)
TOTAL Exports	0	0	0	0	0	0	0	(1000 MT)
Domestic Consumption	12	12	12	12	0	13	13	(1000 MT)
TOTAL Use	12	12	12	12	0	13	13	(1000 MT)
Ending Stocks	0	0	0	0	0	0	0	(1000 MT)
TOTAL DISTRIBUTION	12	12	12	12	0	13	13	(1000 MT)
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0	0	(1000 MT)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	0	(1000 MT)

Import Trade Matrix

Country
CommodityTaiwan
Dairy, Butter

Time Period	2002-2003	Units:	mt
Imports for:	2002		2003
U.S.	6	U.S.	10
Others		Others	
New Zealand	6531		7188
Australia	2852		2400
France	401		495
Netherlands	209		444
Germany	164		335
Ireland	194		280
Belgium	155		255
Total for Others	10506		11397
Others not Listed	221		108
Grand Total	10733		11515

Export Trade Matrix

Country
CommodityTaiwan
Dairy, Butter

Time Period	2002-2003	Units:	mt
Exports for:	2002		2003
U.S.	0	U.S.	0
Others		Others	
Japan	137	Japan	113
Total for Others	137		113
Others not Listed			
Grand Total	137		113