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Report Highlights:

In Marketing Year (MY) 2020, Chilean dairy production increased by 6.3 percent totaling 1.3 billion liters. Additionally, Chile's dairy imports increased by 7.5 percent in value in MY2020 (January to July data). In MY2019, skim milk powder was one of the top products that the United States exported to Chile, totaling \$27 million. The Government of Chile (GOC) and the Chilean dairy industry are focusing on promoting the country as a safe and sustainable source of dairy products and recently launched a joint public-private pilot project for that purpose.

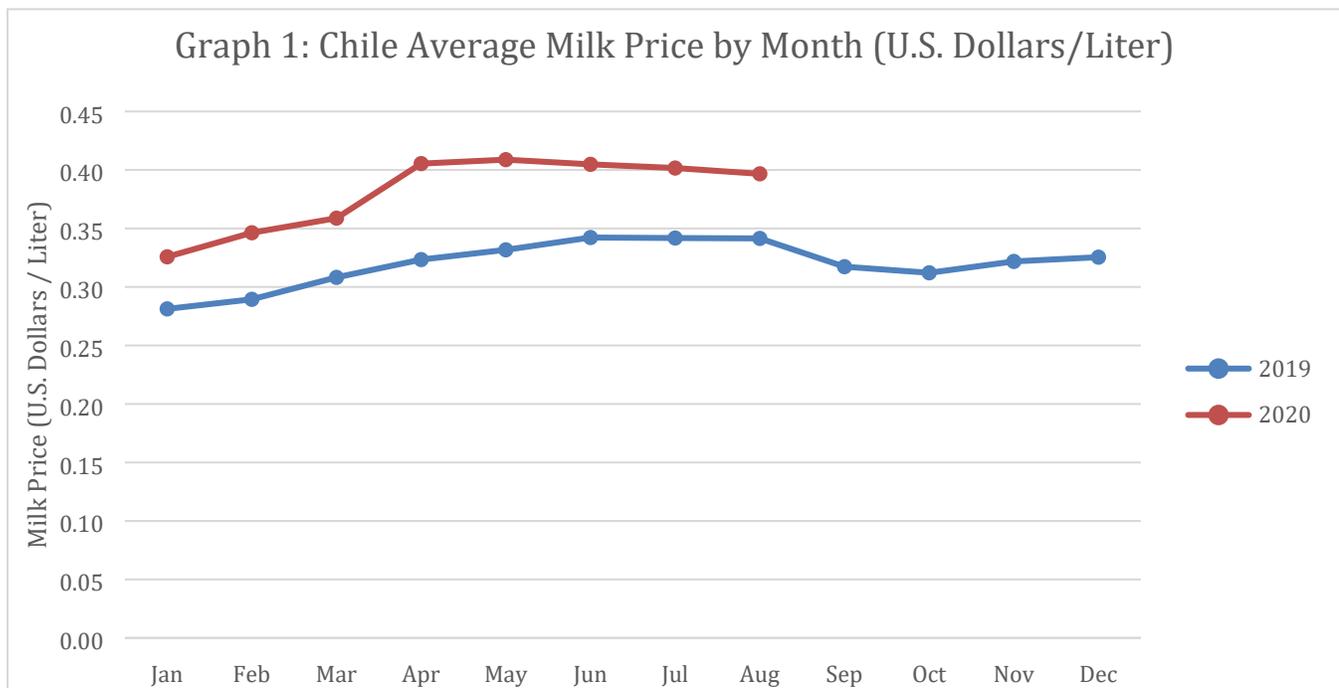
Production:

For the past 10 years, Chile has faced severe droughts impacting pasture and feed availability, thus decreasing fluid milk production. However, this situation changed in MY2020 as a result of abundant rainfall in June 2020, which favored milk production. Additionally, the average monthly producer price for fluid milk increased in MY2020 (See Graph 1).

In MY2020 (January to August data), milk reception increased by 6.3 percent over the same period in MY2019 (See Table 1). Most of Chile’s dairy farms and dairy processing facilities are in the southern regions of *Los Lagos and Los Rios* (See Graph 2). *Los Lagos* region processed 595 million liters of fluid milk from January to August 2020, a 7.0 percent increase over the same period in MY2019. Likewise, from January to August 2019, *Los Rios* processed 413 million liters, a 7.7 percent increase over MY2019.

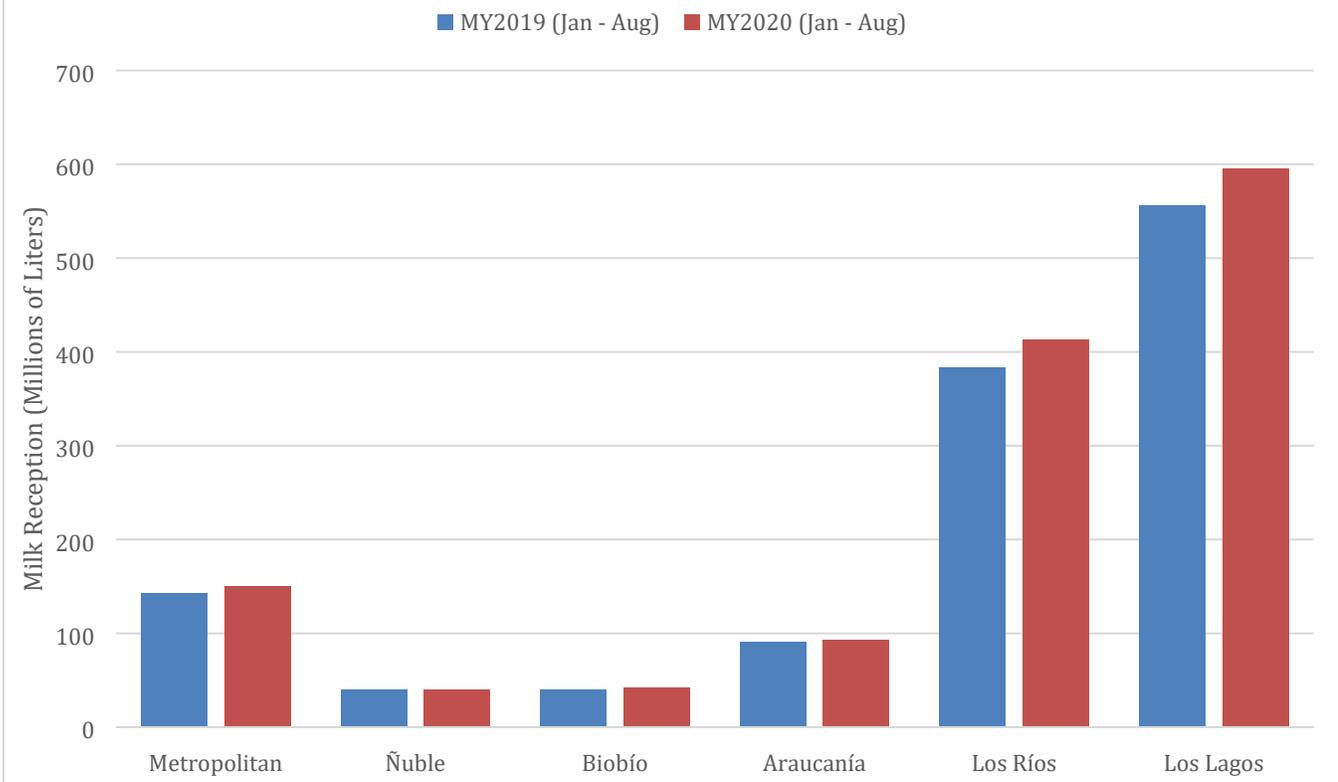
In MY2020 (January to August data), production of whole milk powder, whey, butter, yoghurt, and condensed milk increased over MY2019 while production of skim milk powder, cheese and cottage cheese decreased.

In Chile, eight dairy plants process 80 percent of all the milk produced in Chile, and around 20 other dairy plants process the remainder 20 percent. Only seven out of the 28 dairy plants in Chile that report data to the Chilean Ministry of Agriculture (MOA) produce milk powder.



Note: Exchange rate: 1 USD = 780 Chilean pesos
Source: based in data from ODEPA, 2020

Graph 2: Chile Milk Reception by Region (Million Liters)



Source: based in data from ODEPA, 2020

TABLE 1 - Dairy Production

Year	Total received by industry (Million liters)	Fluid milk (Million Liters)	Whole milk powder (MT)	Skim milk powder (MT)	Whey (MT)	Butter (MT)	Cheese (MT)	Cottage cheese (MT)	Yogurt (Million Liters)	Condensed milk (MT)
2014	2,149	423	75,419	28,091	21,480	21,874	81,574	9,133	227	36,751
2015	2,029	427	59,950	27,352	21,559	22,374	81,650	9,197	230	39,093
2016	1,991	429	50,386	26,514	24,716	22,591	81,234	9,856	244	40,604
2017	2,115	430	58,320	23,670	26,272	23,799	94,269	15,434	240	39,587
2018	2,174	414	64,442	13,588	27,232	25,290	107,507	17,984	235	40,128
2019	2,145	389	70,004	12,416	27,545	25,640	94,744	17,224	226	38,925
2019 (Jan-Aug)	1,252	247	36,827	8,428	16,014	16,766	64,512	11,651	152	23,909
2020(Jan-Aug)	1,331	266	42,150	6,382	18,173	18,950	60,808	10,799	154	27,620
Variation (Jan-Aug)	6.3%	7.8%	14.5%	-24.3%	13.5%	13.0%	-5.7%	-7.3%	1.3%	15.5%

Source: based in data from ODEPA, 2020

Trade:

In MY2020 (January to July data), Chile's dairy imports increased by 7.5 percent in value (See Table 2). The United States was the main supplier of dairy products to Chile with a 27.5 percent market share in MY2019. However, dairy imports from the United States decreased by 6.2 percent in MY2020 over MY2019, and market share declined to 22.2 percent.

Top Chilean dairy imports from the United States are cream cheese and mozzarella, skim milk powder, and ice cream (See Table 3). Chilean imports of consumer-oriented products from the United States declined in MY2020 because of the COVID-19 pandemic. Furthermore, imports were pushed back by the increase in the U.S. dollar value against the Chilean peso.

In contrast, Chilean dairy imports from Argentina increased by 20.5 percent in MY2020 over the same period in MY2019, pushed by imports of cheese and both skim and whole milk powder, which had competitive prices. Similarly, imports from New Zealand increased by 45.7 percent on increased demand for cheese and whole milk powder. For more details on consumer trends in the Chilean market, see [Chile's GAIN Report New Consumer Trends Create Opportunities for U.S. Dairy Products](#) or [Chile's GAIN Report Food Processing Ingredients](#).

Table 2. Chile Dairy Imports from the World
Commodity: BICO-Dairy Products, Dairy Products

Partner	Marketing Year				January-July			
	2018 (Value USD)	2019 (Value USD)	Variation (%)	Market Share(%)	Jan - July 2019 (Value USD)	Jan - July 2020 (Value USD)	Variation (%)	Market Share(%)
World	348,858,880	320,084,599	-8.2%	100.0%	198,161,146	212,995,433	7.5%	100.0%
United States	74,704,603	87,968,649	17.8%	27.5%	50,510,576	47,383,270	-6.2%	22.2%
Argentina	63,809,540	54,366,065	-14.8%	17.0%	30,173,267	36,344,393	20.5%	17.1%
New Zealand	80,753,805	42,416,911	-47.5%	13.3%	35,983,350	52,411,249	45.7%	24.6%
Germany	33,822,574	24,492,314	-27.6%	7.7%	17,143,923	16,293,771	-5.0%	7.6%
Mexico	17,007,363	18,694,555	9.9%	5.8%	10,137,927	10,521,571	3.8%	4.9%
Netherlands	20,073,119	14,938,495	-25.6%	4.7%	8,914,671	15,680,547	75.9%	7.4%
Uruguay	8,392,153	13,661,256	62.8%	4.3%	8,040,929	6,019,867	-25.1%	2.8%
France	12,378,999	11,248,101	-9.1%	3.5%	6,112,716	3,783,582	-38.1%	1.8%
Peru	6,485,668	7,895,227	21.7%	2.5%	4,668,488	3,749,279	-19.7%	1.8%
Ireland	5,593,334	7,780,729	39.1%	2.4%	4,122,513	4,233,303	2.7%	2.0%
Spain	4,587,760	7,734,400	68.6%	2.4%	4,228,366	1,963,584	-53.6%	0.9%
Brazil	5,353,482	6,289,782	17.5%	2.0%	4,116,172	5,509,769	33.9%	2.6%
Denmark	4,227,254	5,548,914	31.3%	1.7%	3,450,643	2,745,176	-20.4%	1.3%
United Kingdom	1,876,581	2,696,212	43.7%	0.8%	2,695,242	232,560	-91.4%	0.1%
Italy	2,557,723	2,668,083	4.3%	0.8%	1,377,918	1,314,981	-4.6%	0.6%
Others	7,234,922	11,684,906	61.5%	3.7%	6,484,445	4,808,531	-25.8%	2.3%

Source: Trade Data Monitor, LLC

Table 3: Chile Imports from the United States
Commodity: BICO-Dairy Products, Dairy Products

Subheading	Description	Marketing Year			January-July		
		2018 (Value USD)	2019 (Value USD)	Variation (%)	Jan - July 2019 (Value USD)	Jan - July 2020 (Value USD)	Variation (%)
BICO-Dairy Products	BICO-Dairy Products	74,704,603	87,968,649	17.8%	50,510,576	47,383,270	-6.2%
040610	Cheese, (Unripened or Uncured) Fresh (Including Whey Cheese), And Curd	35,155,541	39,170,664	11.4%	21,509,856	19,892,639	-7.5%
040210	Skim Milk Powder	21,325,215	26,931,974	26.3%	17,326,277	14,786,478	-14.7%
210500	Ice Cream and Other Edible Ice	4,489,223	5,474,626	22.0%	2,593,032	2,651,018	2.2%
040620	Cheese of All Kinds, Grated or Powdered	4,021,110	4,805,541	19.5%	2,405,227	4,478,513	86.2%
040690	Cheese, Nesoi, Including Cheddar and Colby	3,373,848	3,671,881	8.8%	2,412,183	1,052,772	-56.4%
040410	Whey and Modified Whey, Whether or Not Concentrated or Containing Added Sweeteners	2,803,693	3,576,912	27.6%	2,122,191	1,207,060	-43.1%
170211	Lactose and Lactose Syrup Containing by Weight 99% Or More Lactose	1,010,473	1,820,165	80.1%	873,805	931,970	6.7%
040221	Milk and Cream, Concentrated, Not Sweetened, In Powder, Granules or Other Solid Forms, Of A Fat Content, By Weight, Exceeding 1.5%	1,646,400	1,062,431	-35.5%	657,624	495,698	-24.6%
190110	Food Preparations for Infant Use, Put Up for Retail Sale, Nesoi	345,678	899,478	160.2%	330,097	511,838	55.1%
040630	Cheese, Processed, Not Grated or Powdered	147,525	106,157	-28.0%	62,788	-	-100.0%
350220	Milk Albumin, Including Concentrates of Two Or More Whey Proteins	159,820	99,152	-38.0%	42,745	208,093	386.8%
040110	Milk and Cream, By Weight, Not Exceeding 1%	-	95,663		95,663	409,889	328.5%
040510	Butter	58,933	46,844	-20.5%	24,408	30,889	26.6%
040299	Milk and Cream, Sweetened, Whether or Not Concentrated, Nesoi	364	44,008	11990.1%	-	1,460	
350110	Casein	321	43,978	13600.3%	-	-	0.0%
	Others	166,459	119,175	-28.4%	54,680	724,953	1225.8%

Source: Trade Data Monitor, LLC

Policy:

Dairy Labeling Law Update: In November 2019, the Government of Chile approved a law establishing revised standards for manufacturing, naming, and labeling of milk products or products derived from milk. The legislation proposes country of origin labeling for imported dairy products and it appears to be inconsistent with Codex Alimentarius Commission standards by restricting the circumstances under which products made from reconstituted and recombined milk can be labeled and marketed. The proposed regulation also includes a provision to use the name and the flag of the country of origin of the milk contained therein. In July 2020, Chile notified the WTO of a modification of the law in order to introduce the implementing regulation. The comment period ended on September 22, 2020. However, there is no date for the measure's implementation.

Public-Private Initiatives on Sustainable Agricultural Production

The Government of Chile and Chilean export agro-industry promote joined forces to diversify export markets and domestic consumption of locally produced food. On September 30, Chile [launched a campaign](#) entitled "[*Chile Origen Consciente*](#)" which promotes Chile as a source of high quality, traceable, safe, and sustainable products. The program involves public and private funds and concrete actions that will allow producers to incorporate sustainability criteria that highlights the agricultural sector efforts on sustainable production to consumers. This program is financed with public resources from the Ministry of Economy's Corporation for Economic Promotion (CORFO) and the private sector. The pilot phase of this program involves the Chilean dairy and meat sector. The program has four main areas of action:

1. Creating sustainability standards for each production sector;
2. Evaluating the sustainable performance through goals and indicators;
3. Joining public and private efforts towards sustainable production;
4. Communicating participating companies' results and efforts towards sustainable production.

Dairy Sector Clean Production Initiative: In August 2020, nine dairy processing companies representing 85 percent of Chilean dairy production, signed an agreement for sustainable production [*Acuerdo de Producción Limpia*](#) (APL). The APL involves cooperation between the Chilean government, the Chilean Dairy Producers Association (*Consortio Lechero*), and the dairy companies to implement adaptation and mitigation actions for climate change mitigation for two years. The nine dairy companies established goals to reduce emissions, increase efficiency, improve water and energy management, among others.

Commodities:

Dairy, Dry Whole Milk Powder

Table 4. Production, Supply and Distribution Statistics:

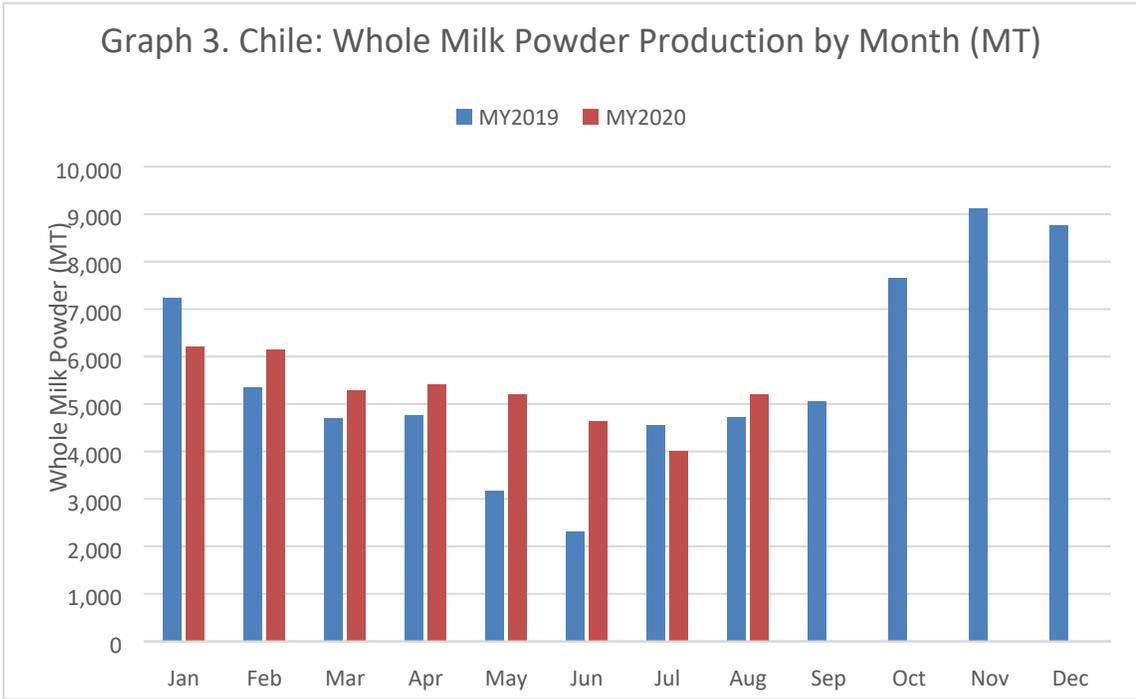
Dairy, Dry Whole Milk Powder	MY2019		MY2020		MY2021	
Market Begin Year	Jan 2019		Jan 2020		Jan 2021	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks	4	4	3	2	0	7
Production	63	70	63	77	0	78
Other Imports	3	3	5	10	0	9
Total Imports	3	3	5	10	0	9
Total Supply	70	77	71	89	0	94
Other Exports	4	4	3	3	0	4
Total Exports	4	4	3	3	0	4
Human Dom. Consumption	63	71	67	79	0	81
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	63	71	67	79	0	81
Total Use	67	75	70	82	0	85
Ending Stocks	3	2	1	7	0	9
Total Distribution	70	77	71	89	0	94
(1000 MT)						

Source: post estimates.

Production:

Post estimates whole milk powder production will reach 77,000 MT in MY2020 and 78,000 MT in MY2021, considering high prices for dairy products and an increase in fluid milk production.

Seven dairy plants in Chile produce whole milk powder and production is destined mainly for domestic consumption. Whole milk powder production peaks from October through January (See Graph 3). Whole milk powder production reached 70,004 MT in MY2019. From January to August 2020, production reached 42,150 MT, a 14.5 percent increase over the same period in 2019.



Source: Based on ODEPA, 2020

Consumption:

Chile’s consumption of whole milk powder is expected to reach 79,000 MT in MY2020 and 81,000 MT in MY2021, following the increase in production of whole milk powder and dairy products such as whey, yoghurt, butter, and condensed milk.

Trade:

Post estimates Chilean whole milk powder imports to reach 10,000 MT in MY2020 and decrease to 9,000 MT in MY2021, counteracting to the increase in dairy production.

In MY2020 (data from January to July), Chilean imports of whole milk powder reached 6,339 MT, a 345.5 percent increase over MY2019, pushed by imports from New Zealand and Argentina (See Table 5).

In MY2019, Chile’s main supplier of whole milk powder was Uruguay, followed by Argentina, the United States, and New Zealand. In MY2020, imports from New Zealand increased rapidly, and reached 3,231 MT, becoming the main supplier so far MY2020. New Zealand multinational dairy processing plants based in Chile import whole milk powder to produce a variety of dairy products such as cheese, yoghurt, and desserts.

Table 5. Chile Imports from the World
Commodity: Whole Milk Powder, HS Codes 040221/040229

Partner	Volume (MT)			Volume (MT)		
	2018	2019	Change (%)	Jan - Jul 2019	Jan - Jul 2020	Change (%)
World	8,431	2,552	-69.7%	1,423	6,339	345.5%
Uruguay	350	1,646	370.3%	802	891	11.1%
Argentina	5,253	380	-92.8%	305	1,751	474.1%
United States	553	344	-37.8%	210	145	-31.0%
New Zealand	2,205	125	-94.3%	77	3,231	4096.1%
France	39	50	28.2%	25	48	92.0%
Netherlands	2	3	50.0%	2	256	12700.0%
Spain	2	3	50.0%	1	17	1600.0%
Peru	24	1	-95.8%	1	-	-100.0%
Partner	Value (USD)			Value (USD)		
	2018	2019	Change (%)	Jan - Jul 2019	Jan - Jul 2020	Change (%)
World	26,436,774	8,521,469	-67.8%	4,692,060	20,991,902	347.4%
Uruguay	1,139,690	5,689,684	399.2%	2,786,382	2,957,882	6.2%
Argentina	16,959,403	1,164,835	-93.1%	910,180	5,839,728	541.6%
United States	1,646,400	1,063,150	-35.4%	658,343	495,698	-24.7%
New Zealand	6,487,350	370,066	-94.3%	218,445	10,521,745	4716.7%
France	164,623	184,990	12.4%	92,124	178,191	93.4%
Netherlands	13,367	32,114	140.2%	18,398	916,526	4881.7%
Spain	8,789	12,894	46.7%	5,705	82,058	1338.4%
Peru	6,167	2,215	-64.1%	2,215	-	-100.0%

Source: Trade Data Monitor, LLC

Post expects Chilean whole milk powder exports to decrease to 3,000 MT in MY2020 and to bounce back to 4,000 MT in MY2021 as conditions for exports and demand from Latin American countries are expected to normalize from the economic shocks of the COVID-19 pandemic.

In MY2020, Chile exported six percent of its whole milk powder production. From January to July 2020 Chilean exports of whole milk powder decreased by 48.5 percent over the same period in 2019 totaling 1,393 MT (See Table 6). In addition, Chile exported 700 MT of whole milk powder to China, which is the main market destination for Chilean whole milk powder exports. Whole milk powder exports to Cuba and Venezuela, which were top export destinations in the past, decreased by 100 percent and 95.6 percent, respectively in MY2020.

Table 6. Chile Exports to the World
Commodity: 040221/040229

Partner	Volume (MT)			Volume (MT)		
	2018	2019	Change (%)	Jan - Jul 2019	Jan - Jul 2020	Change (%)
_ World	4,270	3,513	-17.7%	2,707	1,393	-48.5%
China	500	1,225	145.0%	750	700	-6.7%
Venezuela	1,229	744	-39.5%	703	-	-100.0%
Cuba	150	500	233.3%	500	22	-95.6%
Colombia	-	348		330	50	-84.8%
Bolivia	345	341	-1.2%	224	259	15.6%
Peru	257	322	25.3%	185	131	-29.2%
Panama	32	26	-18.8%	12	31	158.3%
Argentina	3	3	0.0%	2	-	-100.0%
Ecuador	2	3	50.0%	1	-	-100.0%
Brazil	1,750	-	-100.0%	-	200	
Partner	Value (USD)			Value (USD)		
	2018	2019	Change (%)	Jan - Jul 2019	Jan - Jul 2020	Change (%)
_ World	15,351,107	10,172,333	-33.7%	7,922,343	3,720,817	-53.0%
China	1,373,540	3,442,047	150.6%	1,967,570	2,245,543	14.1%
Venezuela	6,782,421	3,093,065	-54.4%	2,923,705	-	-100.0%
Cuba	583,450	1,411,510	141.9%	1,411,510	60,020	-95.7%
Colombia	533	1,046,560	196252.7%	963,883	169,400	-82.4%
Peru	805,148	913,022	13.4%	505,617	368,528	-27.1%
Bolivia	290,003	126,634	-56.3%	84,288	97,338	15.5%
Panama	154,093	125,915	-18.3%	57,989	149,988	158.6%
Argentina	7,794	6,879	-11.7%	4,444	-	-100.0%
Ecuador	4,157	6,222	49.7%	3,077	-	-100.0%
Brazil	5,349,899	301	-100.0%	219	630,000	287571.2%

Source: Trade Data Monitor, LLC

Commodities:

Dairy, Milk, Nonfat Dry

Table 7. Production, Supply and Distribution Data Statistics

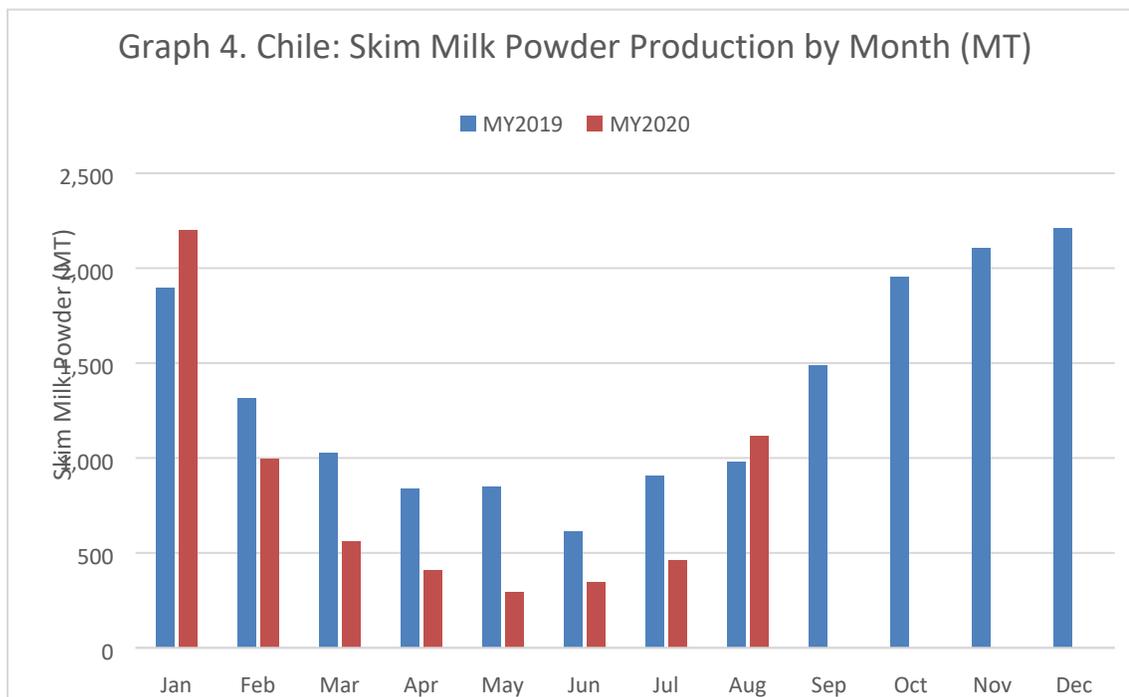
Dairy, Milk, Nonfat Dry	2019		2020		2021	
Market Begin Year	Jan 2019		Jan 2020		Jan 2021	
Chile	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Beginning Stocks	1	1	0	1	0	0
Production	12	13	12	10	0	12
Other Imports	13	14	12	12	0	14
Total Imports	13	14	12	12	0	14
Total Supply	26	28	24	23	0	26
Other Exports	1	1	1	1	0	1
Total Exports	1	1	1	1	0	1
Human Dom. Consumption	25	26	23	22	0	24
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	25	26	0	22	0	24
Total Use	26	27	24	23	0	25
Ending Stocks	0	1	0	0	0	1
Total Distribution	26	28	24	23	0	26
(1000 MT)						

Source: Post Estimates

Production:

Chile's skim milk powder production reached 12,416 MT in MY2019. Post projects MY2020 skim milk powder production to decrease to 10,000 MT, and MY2021 production to bounce back to 12,000 MT to cover domestic consumption needs.

In MY2020 (January to August data) production decreased by 24.3 percent to 6,382 MT. Five dairy plants produce skim milk powder, according to data from the Ministry of Agriculture's Office for Agricultural Studies and Policy (ODEPA). Skim milk powder production peaks during the spring and summer months in Chile from October until March (See Graph 4).



Source: ODEPA, 2020

Consumption:

Dairy processing companies use skim milk powder to produce mainly yoghurt, desserts, ice cream, chocolates, and other dairy products.

Demand for skim milk powder from Chilean processing companies in MY2019 totaled 26,000 MT. In MY2020, Post estimates consumption will decrease to 22,000 MT given the shift in consumer preferences for products derived from fluid milk, in large part due to increased dairy industry marketing efforts to promote locally sourced local products. Additionally, the fluctuation of the exchange rate since October 2019 reduced the demand for imported skim milk powder.

Post projects MY2021 consumption to bounce back and reach 24,000 MT as the Chilean economy and consumption of dairy recovers.

Trade:

In MY2020, Post expects Chilean imports to reach 12,000 MT and in MY2021, imports to bounce back and reach 14,000 MT to cover the increase in consumption. Post expects exports to remain flat at 1,000 MT in MY2020 and MY2021.

Chile's imports of skim milk powder decreased by 15 percent from January to July 2020 over the same period in 2020 reaching 7,515 MT. Chilean imports of consumer-oriented products decreased in MY2020 due to the shocks from the COVID19 pandemic and due to an increase in the dollar value that has remained high since October 2019 to date.

In MY2020 (January to July), U.S. exports of skim milk powder to Chile decreased by 20 percent, totaling 6,086 MT (See Table 8). However, the United States remains the main supplier of skim milk powder to Chile.

In contrast, Chilean exports of skim milk powder increased by seven percent from January to July 2020 over the same period in 2019 totaling 428 MT. Brazil is the top market for Chilean skim milk powder (See Table 9).

Table 8. Chile Imports from the World
Commodity: Skim Milk Powder, HS Code 040210

Chile Imports from _World						
Commodity: Skim Milk Powder, HS Code 040210						
Partner	Volume (MT)			Volume (MT)		
	2018	2019	Change (%)	Jan - Jul 2019	Jan - Jul 2020	Change (%)
_World	13,032	13,488	3.5%	8,842	7,515	-15.0%
United States	11,176	11,435	2.3%	7,611	6,086	-20.0%
Canada	549	692	26.0%	313	75	-76.0%
Netherlands	158	401	153.8%	383	13	-96.6%
Uruguay	520	372	-28.5%	372	300	-19.4%
France	446	224	-49.8%	113	83	-26.5%
Argentina	-	202		-	533	
Ireland	-	78		2	-	-100.0%
Spain	6	44	633.3%	28	21	-25.0%
Italy	31	36	16.1%	20	9	-55.0%
Sweden	-	3		-	-	
Taiwan	-	1		1	-	-100.0%
Partner	Value (USD)			Value (USD)		
	2018	2019	Change (%)	Jan - Jul 2019	Jan - Jul 2020	Change (%)
_World	25,582,677	32,385,409	26.6%	20,483,012	19,273,131	-5.9%
United States	21,325,215	26,931,974	26.3%	17,326,277	14,786,478	-14.7%
Canada	870,314	1,520,768	74.7%	669,251	195,160	-70.8%
Uruguay	1,270,927	1,064,482	-16.2%	1,064,482	786,000	-26.2%
Netherlands	511,296	915,053	79.0%	722,265	107,739	-85.1%
France	1,177,298	913,446	-22.4%	475,369	352,957	-25.8%
Argentina	307	536,516	174660.9%	393	1,614,303	410664.1%
Spain	28,245	193,534	585.2%	124,871	92,736	-25.7%
Italy	140,247	154,654	10.3%	84,187	39,105	-53.5%
Ireland	-	134,183		11,285	-	-100.0%
Sweden	-	14,159		-	-	
Germany	86,911	2,517	-97.1%	1,023	79,911	7711.4%
Taiwan	-	2,184		2,184	-	-100
South Korea	-	800		800	-	-100

Source: Trade Data Monitor, LLC

Table 9. Chile Exports to the World
Commodity: Skim Milk Powder, HS Code 040210

Partner	Volume (MT)			Volume (MT)		
	2018	2019	Change (%)	Jan - Jul 2019	Jan - Jul 2020	Change (%)
_World	1,202	400	-66.7%	400	428	7.0%
Brazil	1,200	400	-66.7%	400	400	0.0%
Panama	-	-		-	14	
Peru	2	-	-100.0%	-	-	
United States	-	-		-	14	
Argentina	-	-		-	-	
Partner	Value (USD)			Value (USD)		
	2018	2019	Change (%)	Jan - Jul 2019	Jan - Jul 2020	Change (%)
_World	3,193,904	1,219,760	-61.8%	1,219,440	1,381,028	13.3%
Brazil	3,189,504	1,215,800	-61.9%	1,215,800	1,277,150	5.0%
Argentina	-	3,960		3,640	-	-100.0%
Panama	-	-		-	59,989	
Peru	4,400	-	-100.0%	-	-	
United States	-	-		-	43,890	

Source: Trade Data Monitor, LLC

Stocks:

In MY2020, following data from ODEPA, Post estimates skim milk powder stocks to decrease to less than 1,000 MT and remain around the same level in MY2021.

Attachments:

No Attachments