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Taiwan

Dairy and Products

Annual

2002

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Report Highlights:

Taiwan dairy production is expected to hover close to 350k mt until the market for fluid milk liberalizes in January 2005. While foreign suppliers will be limited by TRQs to less than 10% of fluid milk demand until that time, they already dominate all other dairy product categories. Dairy is now a fixed component of the Taiwan diet, with most product types having favorable long-term growth prospects. Increasing consumer taste and quality expectations make demand growth prospects best in the mid- to better product quality range.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Taipei ATO [TW2], TW

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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, the authorities subsidized it and erected high barriers to imports. While dairy production is limited, it has continued to increase through to the present, with 2002 output expected to reach 350 thousand metric tons. Production will likely remain steady through 2003, when declines are expected as barriers to imported milk come down. Actual production declines will likely be influenced by two factors, the general public's acceptance of long-life (UHT) milk and the impact of special safeguard (SSG) duties.

The consumption of dairy products has continued to expand, although consumers are becoming more selective, particularly with regard to liquid milk products. In 2002, liquid white milk retail sales are holding steady, while sales of flavored milk drinks and drinking yoghurt are declining. The increasing preference for fresh milk and a general downturn in demand for HRI ingredients cut demand for powdered milk. These trends are expected to continue into 2003. Rising whey demand continues make this the most promising sector for near term growth, although global shortages will likely result in negative growth during 2002. Strong 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 broad traditional prepared food market.

The U.S. 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 US, however, is the major supplier of whey due to competitive pricing and successful promotion efforts into HRI and processed food channels by U.S. exporters and the U.S. Dairy Export Council.

PRODUCTION

Taiwan producers of fresh milk are expected to hold production steady in the 350,000mt per year range until 2004, when industry will need to respond to the elimination of Tariff Rate Quotas (TRQs) in 2005. The high comparative costs of production (roughly twice that of the US) make it likely that local production will drop to 300 thousand metric tons by 2005, with deeper production cuts possible over the longer term. Taiwan's ability to impose Special Safeguard (SSG) assessments on fluid milk imports will play a significant role in determining domestic milk production levels after 2004 (see Trade section). Taiwan's Council of Agriculture promotes locally produced milk through advertisements and quality marking.

Output yields continue 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 in the run up to an open market in 2005.

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 is 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 767 registered dairy farms, concentrated principally in the southeast of the island. Counties with the highest concentration of dairy farms include Tainan, Pingtung, Changhua, Yunlin, and Miaoli Counties (19%, 16%, 16%, 13%, and 6% of the total).

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 economic, policy and consumer preference channels nearly all dairy output (around 90%) into consumer-ready fresh milk (including flavored milks and yoghurt drinks). Of the remainder, local ice cream producers consume 8% of raw milk supplies and producers of milk powder use 1.4%. Dairy products manufactured with local production are consumed domestically. Taiwan produces no other dairy products (cheese, whey, etc.) in commercial quantities.

CONSUMPTION

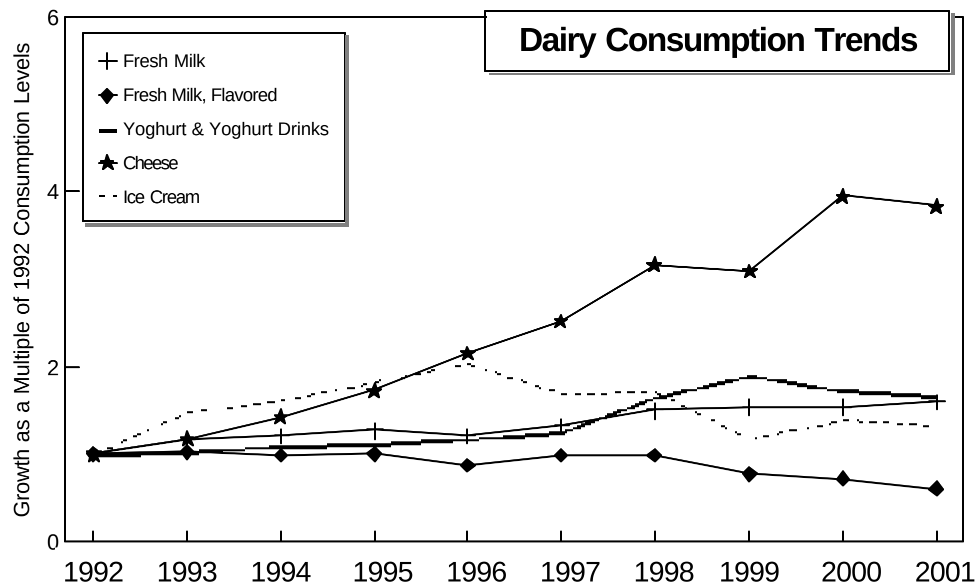
Dairy is now firmly entrenched in the local diet. However, the weak economy will likely temporarily halt or slightly reverse the island's historical 2~4 percent annual rise in dairy consumption in 2002-3. Total fluid milk consumption is expected to remain at around 380 thousand mt in 2002 and 2003. While some (<10%) milk powder is used in the local production of "fresh" milk (principally flavored / yoghurt 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. The 2001 recession cut powdered milk consumption more than originally forecast (see Powdered Milk PSD).

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, yoghurt 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.

Cheese has gained significant ground in recent years and promises to continue increasing market volume through increasing 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 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.

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 currently (2002) spend US$240 (NT$8,200) on dairy items – representing some 11kg per person. Japan, a market to which Taiwan frequently looks for consumer and food trends, still consumes more than 3 times the 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 yoghurt based 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, yoghurt 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

U.S. dairy suppliers continue to be hampered by a strong dollar (currently 34:1) and generally higher landed prices compared to their competitors, especially for commodity items. Also, effective marketing programs by major suppliers of specialty and premium items such as whipped cream, active culture drinks, and fresh cheeses have ensured that European and Japanese competitors predominate in these categories. U.S. suppliers are not expected to gain significant ground in the general dairy market given current supply conditions.

Tariff Rate Quota (TRQ) Administration: Under Taiwan's World Trade Organization (WTO) accession agreement, the 2002 TRQ for the liquid milk is 10,649 mt. In 2003, it will increase to 15,974 mt, to 21,298 mt in 2004, with liberalization set for 2005. Taiwan administers TRQs under "System 2" 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 was 250 mt.

For the 2002 TRQ, bidding was open from December 17, 2001 through January 3, 2002 with winning bids announced on January 7, 2002. Administrative problems have impaired 2002 quotas fill. Of the 10,639 mt available, only 8,620 mt attracted bids. Imports under the TRQ only totaled 1,381 mt as of October. (Note: Taiwan also imports a limited amount of milk to “balance supply and demand” which accounts for the discrepancy between quota fill and import statistics.) Bidders complained about the lack of English language documentation and the requirement for a Taiwan tax number. There were additional problems with speculation in quota rights and on validity dates for quota certificates sold on the secondary market.

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. In other words, 10 percent duty would rise to 13 percent.

Products Potentially 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: Yoghurt; 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. However, recent global supply shortages and corresponding price rises will likely dent shipments of whey to the island during 2002 and, potentially, 2003.

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 unlikely to rise significantly until 2005, when TRQ controls on fluid milk (as well as buttermilk, fermented milk, and cream) imports are lifted completely. The TRQ limits imports of fluid milk to 10,649mt in 2002, 15,974mt in 2003, and 21,298mt in 2004.

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. All TRQ restrictions will be eliminated as of 1 January 2005.

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	12.5
04029110	Condensed milk, unsweetened	20
04029120	Evaporated or sterilized milk, unsweetened	20
04029190	"other" milk or cream, unsweetened	20
04029910[1]	fresh or condensed milk, sweetened	50
04029920	evaporated or sterilized milk, sweetened	15 / TRQ
04029990[2]	milk or cream, neither concentrated nor condensed, sweetened	25
04039010	buttermilk, dry powder	15
04031000	yoghurt	15
04039090[3]	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

1 Tariff applied to condensed product only. Fresh milk in this category is subject to a TRQ and within-quota tariff of 15%.

2 Tariff applied to cream only. Milk in this category will be subject to a TRQ and within-quota tariff of 15%.

3 Two subcategories (04039090924 & 04039090942) subject to 15% tariff and TRQ restrictions.

04050010	butter	10
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[4]	evaporated or sterilized milk, prepared	29
19019029	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 TRQ restrictions will end beginning 1 January 2005.
- 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	8/2001 ~ 7/2002 imports (US$)	Country 1 (import share)	Country 2 (import share)	Country 3 (import share)
milk & cream (0406)	4,557,884	France (60%)	N.Zealand (21%)	UK (7%)
milk & cream (powder)	130,759,611	N.Zealand (46%)	Australia (19%)	Denmark (13%)
yoghurt	244,592	Germany (37%)	UK (25%)	US (24%)
whey (04041090)	9,344,916	US (57%)	Australia (15%)	Germany (8%)
butter	13,839,022	N.Zealand (57%)	Australia (29%)	France (6%)
cheese & curd (0406)	27,016,407	N.Zealand (45%)	Australia (30%)	US (11%)
processed cheese (040630) - subcategory of cheese & curd	10,801,244	N.Zealand (51%)	Australia (24%)	US (11%)
infant formula milk powder	64,405,610	Neth. (26%)	Ireland (23%)	Spain (9%)
ice cream	7,990,569	US (31%)	H.Kong (24%)	France (23%)

The potential of China to supply competitive milk and dairy products into the market (once both are WTO members) is small through the foreseeable future. WTO terms anticipate that member states permit all WTO members equal access, subject to phytosanitary, safety, and

[4] Tariff to be applied to unsweetened product only. Sweetened milk in this category is subject to a TRQ and within-quota tariff of 15%.

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.

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 expands 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 on 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.

The following is a list of recent grocery retail prices for milk and milk products (survey conducted in July / August of each year noted).

(Prices in NT$, Weights as noted on package [in grams *or* cc])
US$1 = approx. NT$34

Product	230cc	290cc	500cc	900~1000cc	1892cc
	2001 / 02	2001 / 02	2001 / 02	2001 / 02	2001 / 02
Manufacturers: Kuang Chuan Dairy, Weichuan, Uni-President, Foremost/Yoplait					
Standard fresh milk (whole & lowfat)	17 *			54 / *	106~108 / 105
Standard fresh milk (whole, flavored)	15 *		30 *	55 / *	
Premium fresh milk (whole & lowfat)		25 / 20 S		62~65 / 62	129 / 125~129
Drinking yoghurt (flavored)	21 / 20		35~45 *	69~75 / *	
Live culture Bifidus Drink	18-20 / 18		35 / 25~35	59 / 58	99 / 89

Other Dairy Products (various makers)	Weight	2001	2002
Yoplait cup yoghurt (2x100g), flavored	200g	NT$38	* (NT$32 S)
Foremost "100% natural fruit juice" flavored milk	950cc	NT$54~55	0
Dairy Whip whipped cream	250g	NT$129	NT$125~129

Butter (single stick)	113.5g	NT$24~25	0
Butter (one lb.)	450g	NT$56~95	NT$85
Sweetened condensed milk	370~397g	NT$39~82	NT$38~82
Evaporated milk	410g	NT$40~49	NT$49
Lowfat milk powder	750~900g	NT$190~275	NT$230~265
Lowfat milk powder	1500~1800g	NT$400~500	NT$445~500
Cheese: Shredded processed "pizza cheese"	300g	NT$89	*
Cheese: Processed American-style	250g	NT$79~90	NT$79~85
Cheese: Emmental (sold pre-sized by weight, grocery)	100g	NT$63	
Cheese: Mozzarella (sold pre-sized by weight, grocery)	100g	NT$42	
Cheese: Mild Cheddar (sold pre-sized by weight, grocery)	100g	NT$47	NT$46
Cheese: Swiss (sold pre-sized by weight, grocery)	100g	NT$58	
"Minas" brand braided cheese (Brazil)	200g	NT$129	
"Laughing Cow" cheese spread	140g	NT$75	*
"Anchor" brand brie	125g		NT$99
Grated Parmesan (processed)	85g	NT$73	*
Ice Cream, local brand "Duroyal"	2000cc	NT$99	* (NT$92 S)

* indicates no change from previous year
S indicates "on sale" price noted at time of survey
a field with no value indicates that product was not observed on store shelves.

STATISTICS

Fluid Milk

PSD Table						
Country	Taiwan					
Commodity	Dairy, Milk, Fluid				(1000 HEAD)(1000 MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Cows In Milk	65	65	65	65	0	64
Cows Milk Production	351	349	353	350	0	348
Other Milk Production	31	30	33	28	0	28
TOTAL Production	382	379	386	378	0	376
Intra EC Imports	0	0	0	0	0	0
Other Imports	2	2	2	3	0	6
TOTAL Imports	2	2	2	3	0	6
TOTAL SUPPLY	384	381	388	381	0	382
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Fluid Use Dom. Consum.	346	343	350	343	0	344
Factory Use Consum.	38	38	38	38	0	38
Feed Use Dom. Consum.	0	0	0	0	0	0
TOTAL Dom. Consumption	384	381	388	381	0	382
TOTAL DISTRIBUTION	384	381	388	381	0	382
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix		
Commodity	Dairy, Milk, Fluid	
Time period	Jan-Dec	mt
Imports for:	2000	2001
U.S.	6	6
Others		
France	1246	1540
New Zealand	603	597
UK	165	235
Belgium	180	19
Australia	36	18
Total for Others	2230	0
Others not Listed	0	18
Grand Total	2236	2434

Export Trade Matrix		
Commodity	Dairy, Milk, Fluid	
Time period	Jan-Dec	mt
Exports for:	2000	2001
U.S.	0	0
Others		
	0	0
Total for Others	0	0
Others not Listed		
Grand Total	0	0

Prices Table			
Commodity	Dairy, Milk, Fluid		
Prices in	2001-2002	per uom	kg
Year	2001	2002	% Change
Jan	16.43	16.25	-1.10%
Feb	16.78	16.34	-2.62%
Mar	16.62	16.7	0.48%
Apr	19.47	21.06	8.17%
May	20.88	21.27	1.87%
Jun	22.16	23.52	6.14%
Jul	22.05	23.24	5.40%
Aug	22.56	23.5	4.17%
Sep	22.63		
Oct	22.07		
Nov	21.02		
Dec	17.02		
Exchange Rate		Local currency/US $	34/1

Whole Milk, Powdered

PSD Table						
Commodity	Dairy, Dry Whole Milk Powder				(1000 MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Beginning Stocks	0	0	0	0	0	0
Production	6	6	6	6	0	6
Intra EC Imports	0	0	0	0	0	0
Other Imports	40	28	41	25	0	24
TOTAL Imports	40	28	41	25	0	24
TOTAL SUPPLY	46	34	47	31	0	30
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Human Dom. Consumption	46	34	47	31	0	30
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	46	34	47	31	0	30
TOTAL Use	46	34	47	31	0	30
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	46	34	47	31	0	30
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix		
Commodity	Dairy, Dry Whole Milk Powder	
Time period	Jan-Feb	mt
Imports for:	2000	2001
U.S.	80	25
Others		
New Zealand	15438	18324
Australia	11982	7362
Belgium	25	838
Ireland	1209	704
UK	408	550
Netherlands	693	268
France	227	176
Total for Others	29982	0
Others not Listed	254	136
Grand Total	30316	28382

Export Trade Matrix		
Commodity	Dairy, Dry Whole Milk Powder	
Time period	Jan-Dec	mt
Exports for:	2000	2001
U.S.	0	0
Others		
	0	0
Total for Others	0	0
Others not Listed		
Grand Total	0	0

Nonfat Milk, Powdered

PSD Table						
Country	Taiwan					
Commodity	Dairy, Milk, Nonfat Dry				(1000 MT)	
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Beginning Stocks	0	0	0	0	0	0
Production	0	0	0	0	0	0
Intra EC Imports	0	0	0	0	0	0
Other Imports	37	34	40	30	0	31
TOTAL Imports	37	34	40	30	0	31
TOTAL SUPPLY	37	34	40	30	0	31
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Human Dom. Consumption	37	34	40	30	0	31
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	37	34	40	30	0	31
TOTAL Use	37	34	40	30	0	31
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	37	34	40	30	0	31
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix		
Commodity	Dairy, Milk, Nonfat Dry	
Time period	Jan-Feb	mt
Imports for:	2000	2001
U.S.	21	167
Others		
New Zealand	15969	19294
Australia	11164	8945
Denmark	5813	4508
Ireland	796	339
Netherlands	341	325
Russia	325	250
France	219	116
Total for Others	34627	0
Others not Listed	164	30
Grand Total	34812	33974

Export Trade Matrix		
Country	Taiwan	
Commodity	Dairy, Milk, Nonfat Dry	
Time period	Jan-Dec	mt
Exports for:	2000	2001
U.S.	0	0
Others		
	0	0
Total for Others	0	0
Others not Listed		
Grand Total	0	0

Whey, Dried

PSD Table						
Commodity	Dairy, Dried Whey				(1000 MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2001		01/2001
Beginning Stocks	0	0	0	0	0	0
Production	0	0	0	0	0	0
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	17	0	13	0	18
TOTAL Imports	0	17	0	13	0	18
TOTAL SUPPLY	0	17	0	13	0	18
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Human Dom. Consumption	0	17	0	13	0	18
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	0	17	0	13	0	18
TOTAL Use	0	17	0	13	0	18
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	17	0	13	0	18
Calendar Yr. Imp. from U.S.	0	12	0	9	0	13
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix		
Commodity	Dairy, Dried Whey	
Time period	Jan-Dec	mt
Imports for:	2000	2001
U.S.	11499	11561
Others		
Australia	2410	1786
Canada	1284	1143
Germany	75	817
France	195	662
Netherlands	890	508
Total for Others	4854	0
Others not Listed	920	520
Grand Total	17273	16977

Export Trade Matrix		
Commodity	Dairy, Dried Whey	
Time period	Jan-Dec	mt
Exports for:	2000	2001
U.S.	0	0
Others		
	0	0
Total for Others	0	0
Others not Listed		
Grand Total	0	0

Butter

PSD Table						
Commodity	Dairy, Butter				(1000 MT)	
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Beginning Stocks	0	0	0	0	0	0
Production	0	0	0	0	0	0
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	10	0	10	0	10
TOTAL Imports	0	10	0	10	0	10
TOTAL SUPPLY	0	10	0	10	0	10
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Domestic Consumption	0	10	0	10	0	10
TOTAL Use	0	10	0	10	0	10
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	10	0	10	0	10
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix		
Commodity	Dairy, Butter	
Time period	Jan-Dec	mt
Imports for:	2000	2001
U.S.	0	0
Others		
New Zealand	6327	6183
Australia	2598	2896
France	411	426
Netherlands	110	119
Denmark	63	108
Belgium	62	81
Canada	0	50
Total for Others	9571	0
Others not Listed	36	91
Grand Total	9607	9954

Export Trade Matrix		
Commodity	Dairy, Butter	
Time period	Jan-Feb	mt
Exports for:	2000	2001
U.S.	0	0
Others		
Japan	0	18
Total for Others	0	0
Others not Listed		1
Grand Total	0	19