

Bedryfsinligting Industry information



September 2011

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Bedryfsinligting¹

Melkproduksie en –verbruik

Maandelikse melkproduksie en verbruik vir die periode vanaf 2007 tot 2011 word in Tabel 1 verskaf. Die langtermyn tendens in melkproduksie blyk uit Figuur 1, wat jaarlikse melkproduksie vir die periode vanaf 1992/93 tot 2011 aandui. Melkproduksie vertoon 'n stygende langtermyn tendens.

Maandelikse melkproduksie vir die 2007 tot Julie 2011 en beraamde produksie vir Aug – Des 2011 word grafies in Figuur 2 aangedui.

Industry Information²

Milk production and consumption

Monthly milk production and consumption from 2007 to 2011 are provided in Table 1. The long-term trend in milk production is clear from Figure 1, denoting annual milk production from 1992/93 to 2011. Milk production shows an increasing long-term trend.

Monthly milk production for 2007 to July 2011 and predicted production for Aug - Dec 2011 are shown in Figure 2.

¹ Bron van alle statistiek is MPO behalwe waar ander bron aangedui is.

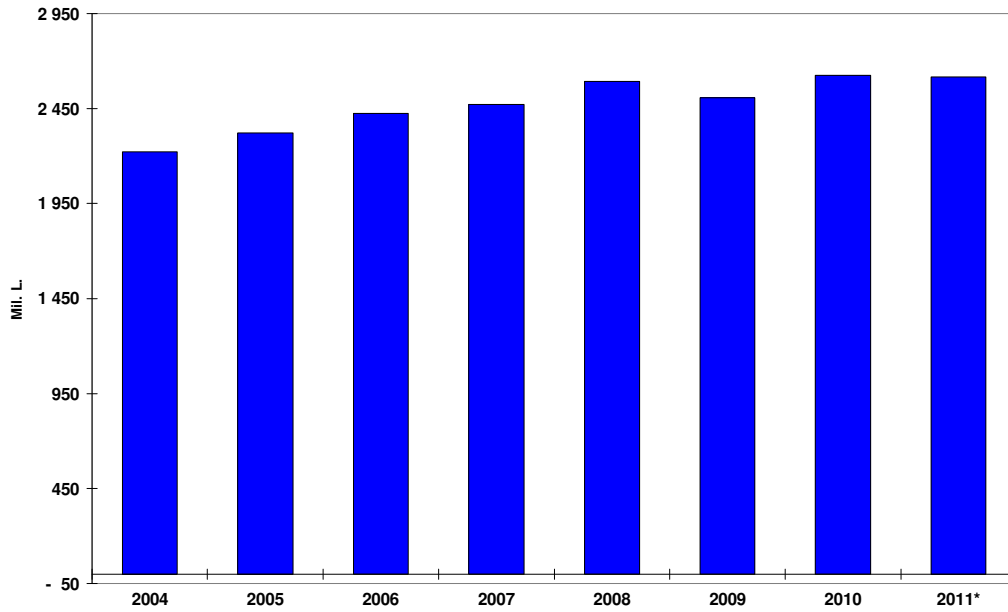
² Source of all statistics is MPO except where indicated

Tabel 1: Kommersiele melkproduksie en aanwending daarvan, 2005 – 2009*
Table 1: Commercial milk production and application, 2005 – 2009*

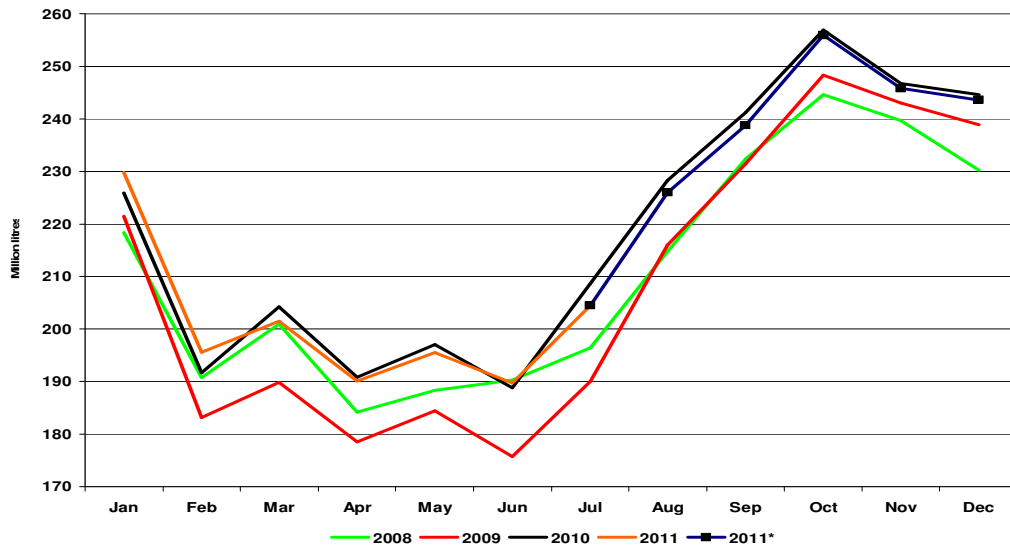
2005	2 321 613	4.5	2 342 395	6.1	- 20 782	(0.9)
2006	2 425 278	4.5	2 444 144	4.3	- 18 866	(0.8)
2007	2 470 345	1.9	2 548 376	4.3	- 78 031	-3.2
2008	2 593 281	5.0	2 561 874	0.5	31 407	1.2
2009	2 508 575	-3.3	2 571 562	0.4	(62 987)	(2.5)
Jan-10	225 925	2.0	229 851	2.0	(3 925)	(1.7)
Feb-10	191 707	4.7	197 733	2.0	(6 026)	(3.1)
Mar-10	204 213	6.2	203 059	2.0	1 154	0.6
Apr-10	190 859	6.9	202 944	2.0	(12 085)	(6.3)
May-10	197 084	6.9	194 718	2.0	2 366	1.2
Jun-10	188 780	7.4	190 919	2.0	(2 139)	(1.1)
Jul-10	208 636	9.8	208 376	2.0	261	0.1
Aug-10	228 292	5.7	229 245	2.0	(953)	(0.4)
Sep-10	241 142	4.2	229 744	2.0	11 398	4.7
Oct-10	256 933	3.5	248 904	2.0	8 029	3.1
Nov-10	246 764	3.3	245 377	2.0	1 387	0.6
Dec-10	244 593	2.4	242 124	2.0	2 470	1.0
2010	2 624 929	5.0	2 622 993	2.0	1 935	0.1
Jan-11	229 766	1.7	233 299		(3 533)	(1.5)
Feb-11	195 541	2.0	200 699		(5 158)	(2.6)
Mar-11	201 558	-1.3	206 105		(4 546)	(2.3)
Apr-11	190 095	-0.4	205 988		(15 893)	(8.4)
May-11	195 448	-0.8	197 638		(2 190)	(1.1)
Jun-11	189 762	0.5	193 783		(4 021)	(2.1)
Jul-11	204 464	-2.0	211 501		(7 038)	(3.4)
Aug-11	226 009	-1.0	232 684		(6 675)	(3.0)
Sep-11	238 731	-1.0	233 191		5 540	2.3
Oct-11	255 905	-0.4	252 637		3 268	1.3
Nov-11	245 777	-0.4	249 057		(3 281)	(1.3)
Dec-11	243 615	-0.4	245 756		(2 141)	(0.9)
2011	2 616 671	-0.3	2 662 338		(45 667)	(1.7)

Produksie en verbruik geprojekteer vanaf Augustus 2011
 Production and consumption projected from August 2011

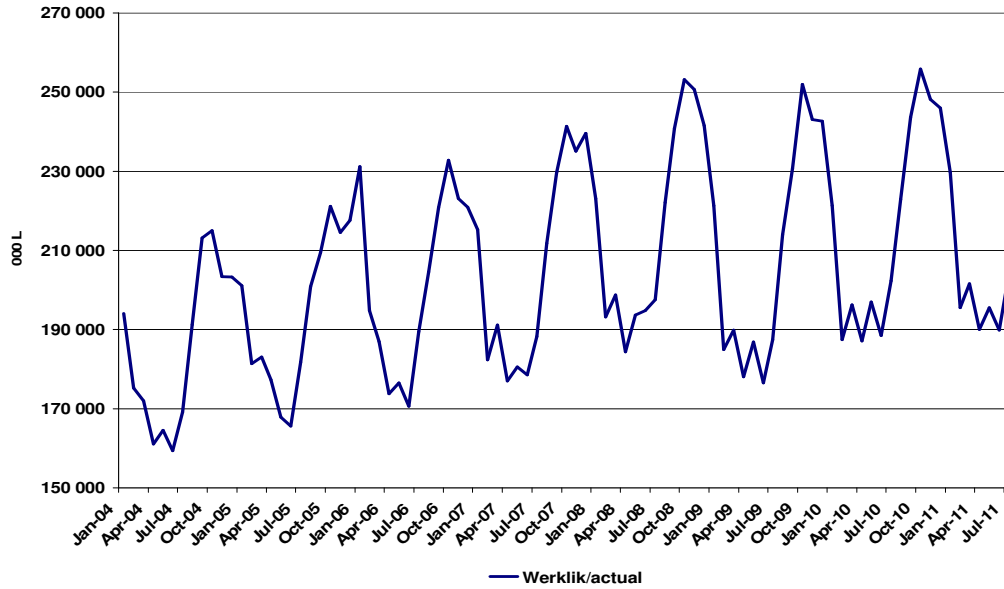
FIGUUR 1: JAARLIKSE MELKPRODUKSIE 1992/93 – 2011*
FIGURE 1: ANNUAL MILK PRODUCTION 2000 – 2011*



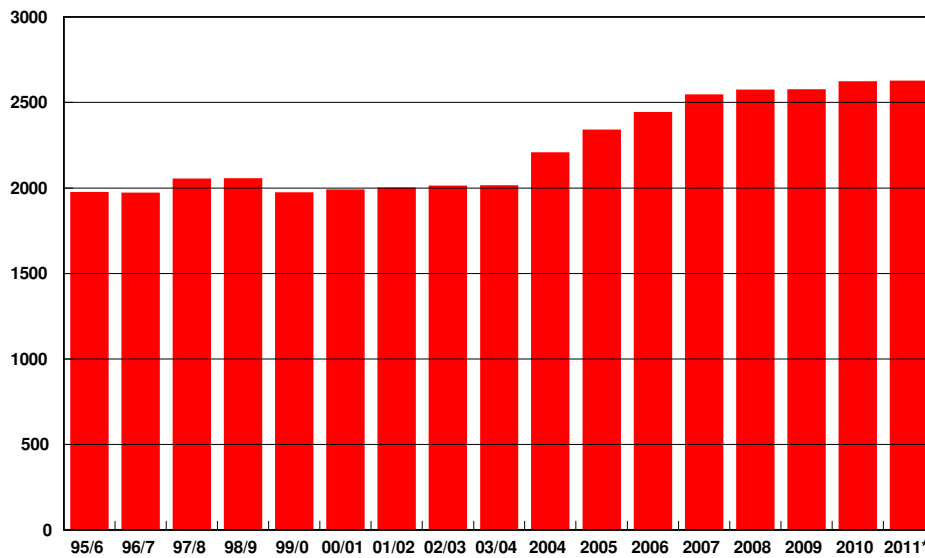
FIGUUR 2: MAANDELIKSE MELKPRODUKSIE, 2007 – 2011
FIGURE 2: MONTHLY MILK PRODUCTION, 2007 – 2011



FIGUUR 3: LANGTERMYN TENDENS IN MELKPRODUKSIE
FIGURE 3: LONG TERM TREND IN MILK PRODUCTION



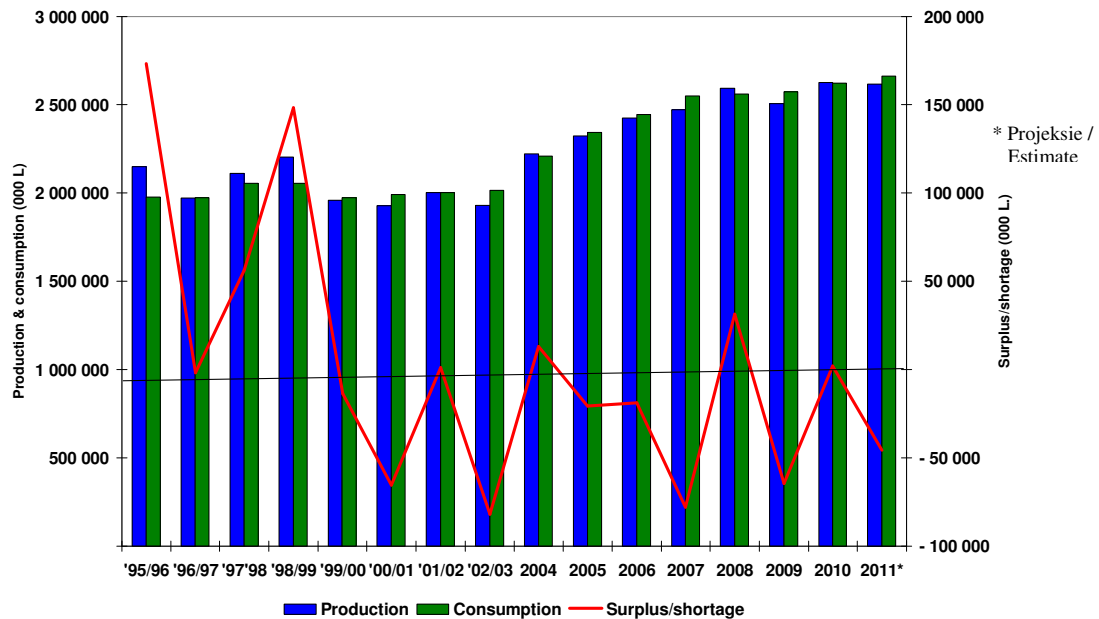
FIGUUR 4: JAARLIKSE PLAASLIKE VERBRUIK, 1992/93 TOT 2011*
FIGURE 4: ANNUAL LOCAL CONSUMPTION, 1992/93 TO 2011*



Die jaarlikse verskil tussen melkproduksie en -verbruik vir die periode vanaf 1992/93 tot 2011 word in Figuur 5 aangedui. In Figuur 6 word die verloop van kumulatiewe maandelikse surplusse en tekorte vir die 2007 tot 2011-seisoene aangedui.

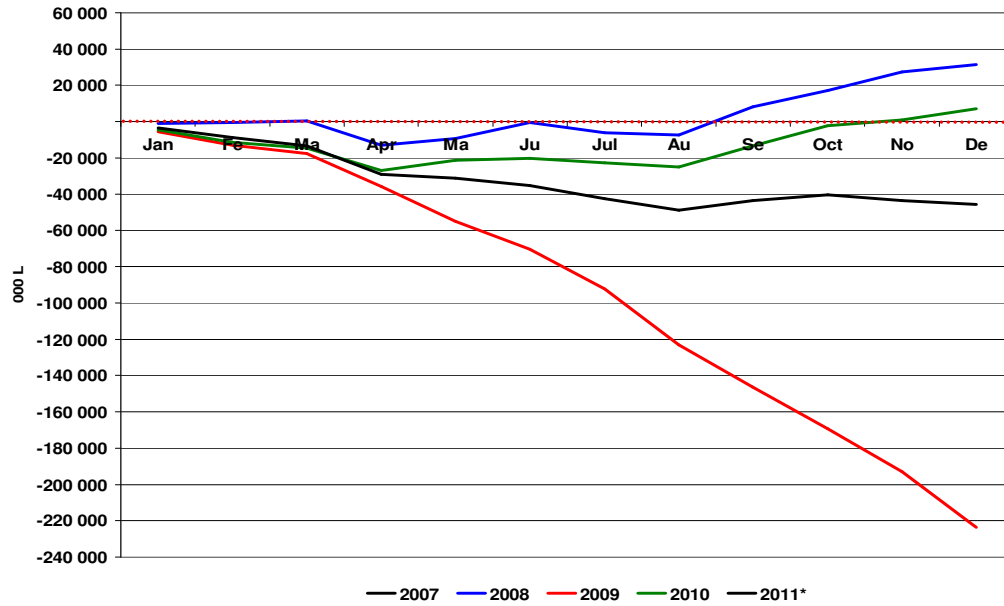
The annual difference between milk production and consumption from 1992/93 to 2011 is shown in Figure 5. Figure 6 shows cumulative monthly surpluses and shortages for 2007 to 2011.

FIGUUR 5: JAARLIKSE VERSKIL TUSSEN MELKPRODUKSIE EN – VERBRUIK, 1995/96 TOT 2011
FIGURE 5: ANNUAL DIFFERENCE BETWEEN MILK PRODUCTION AND CONSUMPTION, 1995/96 TO 2011



* estimate/beraming

**FIGUUR 6: MAANDELIKSE KUMULATIEWE VERSKIL TUSSEN
 PRODUKSIE EN VERBRUIK, 2008 TOT 2011***
**FIGURE 6: MONTHLY CUMULATIVE DIFFERENCE BETWEEN
 PRODUCTION AND CONSUMPTION, 2008 TO 2011***



* estimate/beraming

Invoer statistiek

Invoer statistiek vir die jare van 2009 tot 2011 word in Tabel 2 weergegee. Jaarlikse invoere vanaf 1991 tot 2011 word in Figuur 7 aangedui en maandelikse invoere op 'n melk ekwivalent basis vanaf Januarie 2000 tot April 2011 in Figuur 8.

Die samestelling van invoere vir 2008 – 2011 word in Figuur 9 aangedui.

Import statistics

Import statistics for the years from 2009 to 2011 are summarized in Table 2.

Annual imports from 1991 to 2011 are shown in Figure 7 and monthly imports, on a milk equivalent base from January 2000 to April 2011 in Figure 8.

Figure 9 shows the composition of imports for 2008 – 2011.

Tabel 2: Jaarlijkse invoere 2009 – 2011**

Table 2: Annual imports 2009– 2011**

Total Annual imports

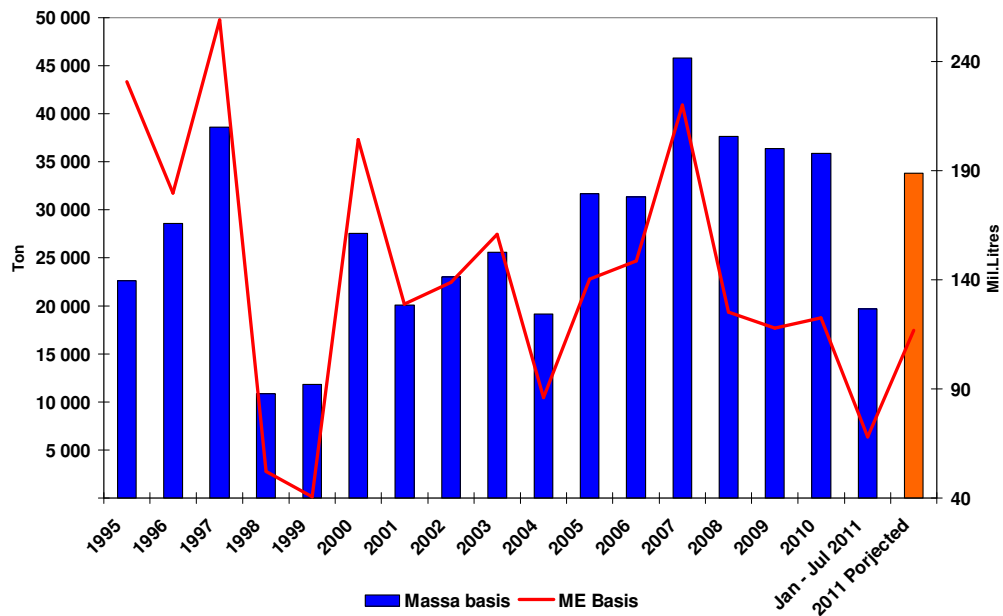
HEADING	SUBHEADING	ARTICLE DESCRIPTION	2009	2010	2011**
0401		Melk en Room / Milk and Cream			
	0401.10	Afgeroomde melk / Skimmed milk	1 054 919	78 985	54 166
	0401.20	Volroommelk / Full Cream milk	12 248 306	8 130 190	2 948 170
	0401.30	Hoefvetmelk of room / High fat milk or cream	1 029 904	2 902 540	705 658
			<u>14 333 129</u>	<u>11 111 715</u>	<u>3 707 994</u>
0402		Melk, gekonsentreerd / Milk, concentrated			
	0402.10	AMP / Skimmed milk powder	2 744 187	3 618 243	2 636 258
	0402.21	Onversoet / Unsweetened	2 816 170	3 123 930	1 484 057
	0402.29	Ander / Other	117 568	275 895	489 056
	0402.9	Kondensmelk / Condensed milk			
	0402.91	Onversoete / Unsweetened	35 510	67 332	36 887
	0402.99	Ander (versoete) / Other (Sweeten)	228 961	652 048	300 096
			<u>5 942 396</u>	<u>7 737 448</u>	<u>4 946 354</u>
0403		Karringmelk & Joghurt / Buttermilk & Yogurt			
	0403.10	Joghurt / Yogurt	32 597	39 923	38 928
	0403.90	Karringmelkpoelier / Buttermilk powder	1 309 802	1 366 719	978 226
			<u>1 342 399</u>	<u>1 406 642</u>	<u>1 017 154</u>
0404		Wei & gemodificeerde wei / Whey & modified whey			
	0404.10	Wei & gemodificeerde wei / Whey & modified whey	4 373 421	6 159 876	4 713 231
	0404.90	Ander / Other	1 658 264	1 126 246	607 233
			<u>6 031 685</u>	<u>7 286 122</u>	<u>5 320 464</u>
0405		Botter & ander melkvette / Butter & other milk fats			
	0405.10	Botter/Butter	3 146 404	2 224 334	1 340 854
	0405.20.10	Suiwelsmere/Dairy spreads	39	746	1 368
	0405.20.90	Ander Suiwelsmere / Other Dairy Spreads			
	0405.90	Ander/Other	5 244	6 995	5 137
			<u>3 151 687</u>	<u>2 232 075</u>	<u>1 347 359</u>
0406		Kaas en Wrongel / Cheese and Curd			
	0406.10	Varskaas en wrongel / Fresh cheese and curd	248 777	327 316	330 121
	0406.20	Gerasperde of verpoelieerde kaas / Grated or powdered cheese	197 147	155 129	128 168
	0406.30	Proseskaas / Processed cheese	786 149	1 463 747	1 300 051
	0406.40	Blougeaarde kaas / Blue-veined cheese	767 164	122 727	88 671
	0406.90	Ander kaas / Other cheese	3 588 760	4 015 960	1 524 522
			<u>5 587 997</u>	<u>6 084 879</u>	<u>3 371 533</u>
		GROOTTOTAAL / GRAND TOTAL	<u>36 389 293</u>	<u>35 858 881</u>	<u>19 710 858</u>
		TOTAAL MELKEKWIVALENT** (LITER)/ TOTAL MILK EQUIVALENT** (LITER)	117 739 514	122 460 282	68 156 390

* *NO BUTTER, WHEY- AND BUTTERMILK POWDER TAKEN INTO ACCOUNT

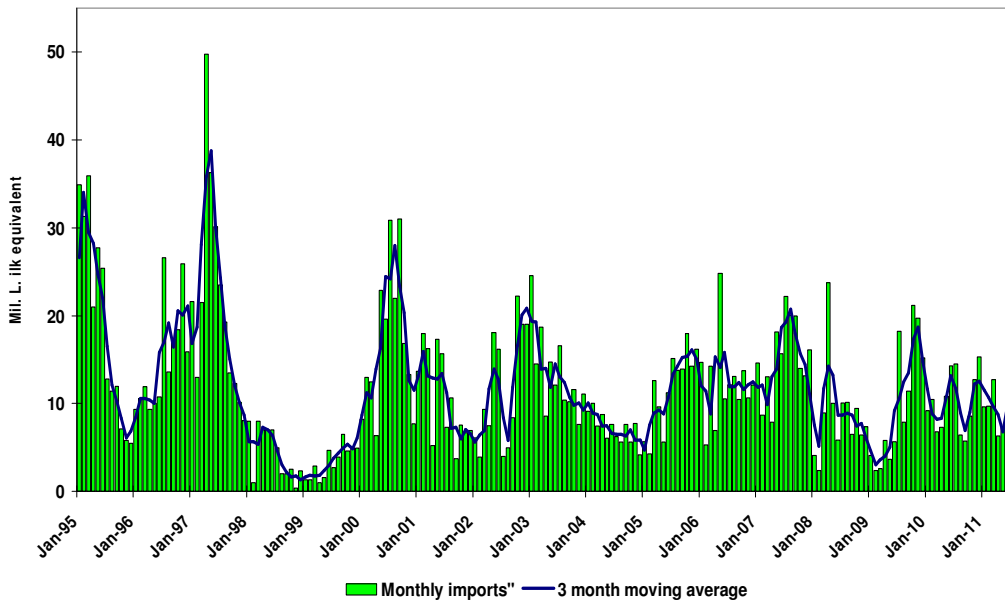
* *GEEN BOTTER, WEI- EN KARRINGMELK POEIER IN AG GENEEM

* 2011 = Jan – July

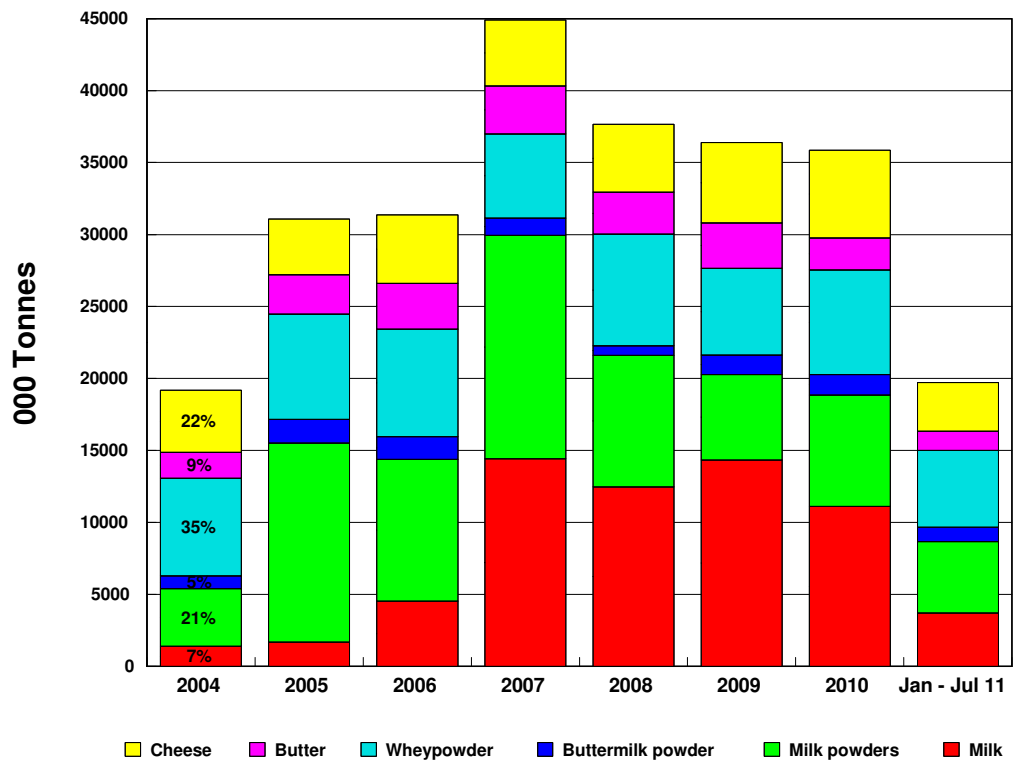
FIGUUR 7: JAARLIKSE INVOERE VAN SUIWELPRODUKTE, 1995 – 2011
FIGURE 7: ANNUAL IMPORTS OF DAIRY PRODUCTS, 1995 – 2011



FIGUUR 8: MAANDELIKSE INVOERE, MELK EKWIVALENT BASIS
FIGURE 8: MONTHLY IMPORTS, MILK EQUIVALENT BASE



FIGUUR 9 PERSENTASIE SAMESTELLING VAN INVOERE, 2004-2011
FIGURE 9 PERCENTAGE COMPOSITIONS OF IMPORTS, 2004-2011



Uitvoer statistiek

Uitvoer statistiek vir die jare vanaf 2006 tot Apr 2011 word in Tabel 3 aangedui. Die persentuele samestelling van jaarlikse uitvoere word in Figuur 10 aangedui.

Netto Uitvoere

Jaarlikse netto uitvoere op 'n melk ekwivalent basis word in Figuur 11 aangedui.

Export statistics

Export statistics for 2006 to Apr 2011 are shown in Table 3. The composition of annual exports is shown in Figure 10.

Net Exports

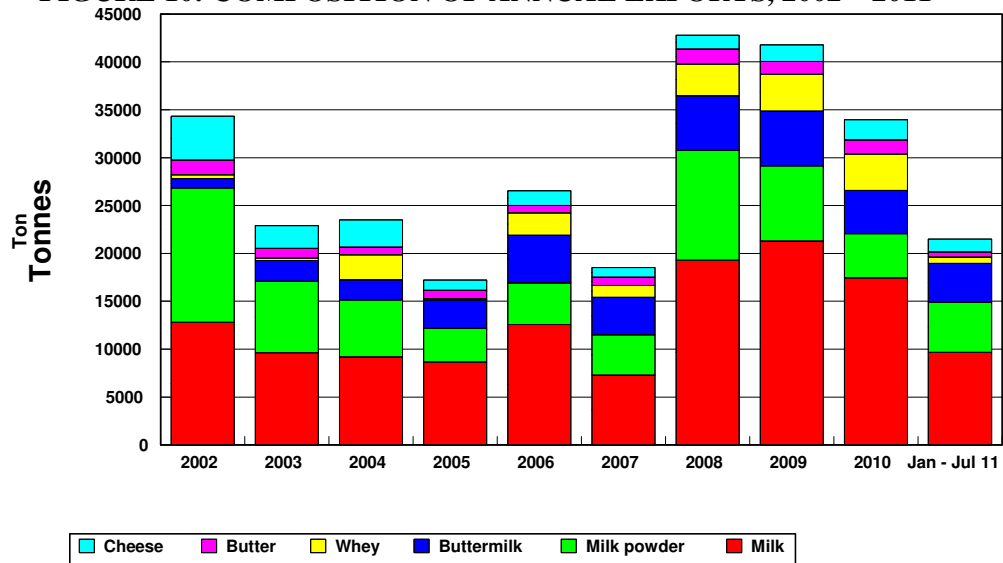
Net exports, on a milk equivalent basis, are shown in Figure 11.

TABEL 3: JAARLIKSE UITVOERE, (Ton) 2002 – 2010
TABLE 3: ANNUAL EXPORTS, (Tonnes) 2002 – 2010

HEADING OPSKRIF	ARTICLE DESCRIPTION BESKRYWING	2006	2007	2008	2009	2010	2011
0401	Melk en Room / Milk and Cream	12 559	7 227	19 294	15302	17 451	9 671
0402	Melk, gekonsentreerd / Milk, concentrated	4 367	4 325	11 446	6 536	4 612	5 251
0403	Karringmelk & Joghurt / Buttermilk & Yogurt	4 980	3 904	5 743	4 120	4 527	4 050
0404	Wei & gemodifiseerde wei / Whey & modified whey	2 339	1 239	3 928	2 286	3 805	663
0405	Botter & ander melk vette / Butter & other milk fats	771	880	1 565	786	1 471	531
0406	Kaas en Wrongel / Cheese and Curd	1 527	979	1 434	1 200	2 083	1 314
2105	Roomys & alle eetbare ys / Ice Cream and other edible ice						
GROOT TOTAAL / GRAND TOTAL		24 933	18 516	42 781	30 231	33 950	21 481

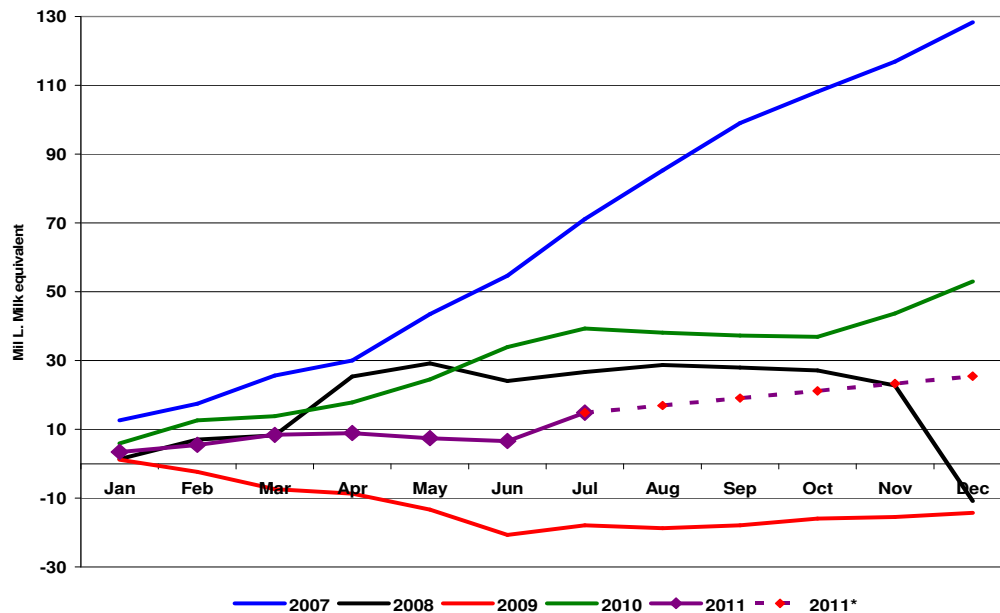
Bron/Source: Customs & Excise export statistics
 * Jan – Jul 2011

FIGUUR 10: SAMESTELLING VAN JAARLIKSE UITVOERE, 2002 – 2011
FIGURE 10: COMPOSITION OF ANNUAL EXPORTS, 2002 – 2011



Source: MPO CALCULATIONS

FIGUUR 11: KUMULATIEWE NETTO INVOERE, MELK EKWIVALENT BASIS, 2007 - 2011
FIGURE 11: CUMULATIVE NET IMPORTS, MILK EQUIVALENT BASIS, 2007 – 2011



Source: MPO Calculations

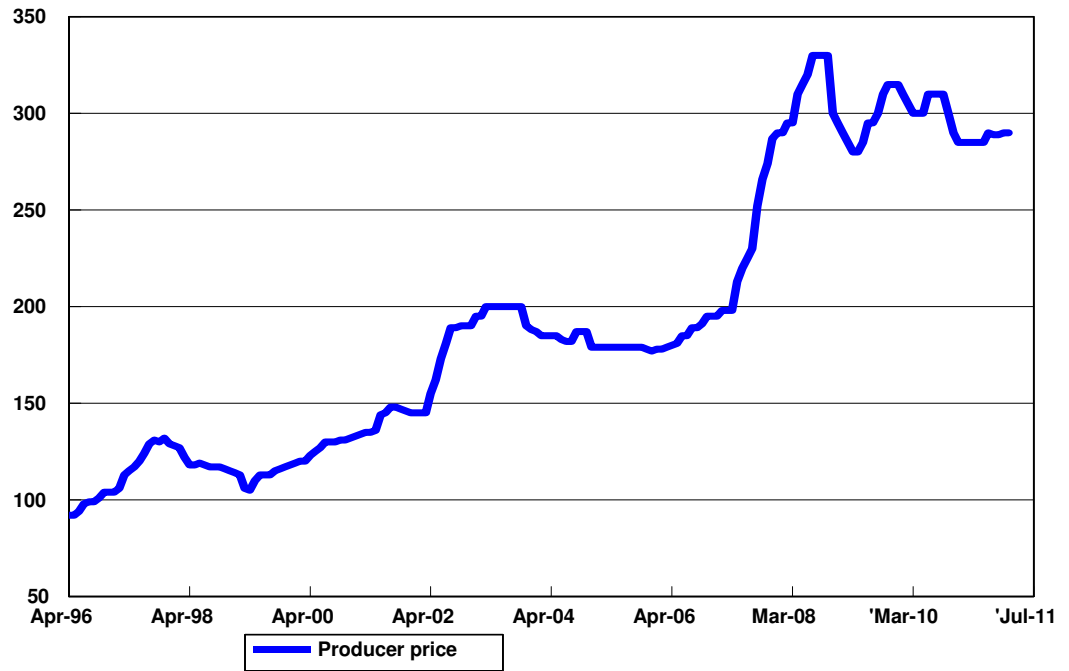
TABEL 4: PRODUSENTEPRYSE VAN MELK
TABLE 4: PRODUCER PRICES OF MILK

PERIOD (E)	PRYS/PRICE R/L	% VERANDERING/% CHANGE	
		I MAAND/MONTH	IJAAR/YEAR
Jan 08	3,10	1,7	51,5
Feb 08	3,15	1,7	43,1
Mar 08	3,20	1,6	40,1
Apr 08	3,30	3,1	46,7
May 08	3,30	3,0	47,8
Jun 08	3,30	0	51,1
Jul 08	3,30	-3	24,0
Aug 08	3,00	-10,0	9,4
Sep 08	2,95	-1,7	2,8
Okt 08	2,90	-1,7	0,0
Nov 08	2,85	-1,7	-1,7
Des 08	2,80	-1,8	-5,1
Jan 09	2,80	0,0	-9,7
Feb 09	2,85	1,8	-9,5
Mar 09	2,95	3,5	-7,8
Apr 09	2,95	0,0	-10,6
Mei 09	3,00	1,7	-9,0
Jun 09	3,10	3,3	-6,0
Jul 09	3,15	1,6	-4,5%
Aug 09	3,15	0,0	+5%
Sep 09	3,15	0,0	+6,6%
Okt 09	3,10	-1,6	+6,8
Nov 09	3,05	-1,6	+7,0
Des 09	3,00	-1,6	+7,0
Jan 10	3,00	0,0	+7,1%
Feb 10	3,00	0,0	+1,7%
Mar 10	3,10	0,0	+5,0%
Apr 10	3,10	0,0	+5,0%
May 10	3,10	0,0	+3,3%
Jun 10	3,10	0,0	+0,0%
Jul 10	3,00	-3,2	-4,8%
Aug 10	2,90	-3,3	-7,9%
Sep 10	2,85	-3,4	-11,1%
Oct 10	2,85	0,0	-8,1%
Nov 10	2,85	0,0	-6,5%
Dec 10	2,85	0,0	-5,0%
Jan 11	2,85	0,0	-5,0%
Feb 11	2,85	0,0	-5,0%
Mar 11	2,90	1,7	-6,4%
Apr 11	2,89	-0,3	-6,7%
May 11	2,89	0,0	-6,7%
Jun 11	2,90	0,3	-6,5%
Jul 11	2,90	0,0	-3,3%

*Geweegde gemiddelde prys gebaseer op 75% van volume 1000L/dag A graad Bottervet, Protein = gemiddeld / Weighted average price based on 75% of volume 1000L/day A grade Butterfat, Protein = average.

Bron: MPO Berekening

FIGUUR 12: MAANDELIKSE PRODUSENTEPRYSE, SENT/L, 1996 – 2011
FIGURE 12: MONTHLY PRODUCER PRICES CENT/L, 1996 – 2011



Internasionale omgewing

Wêreld suiwel produkpryse word in Tabel 5 en Figuur 14 aangedui.

International situation

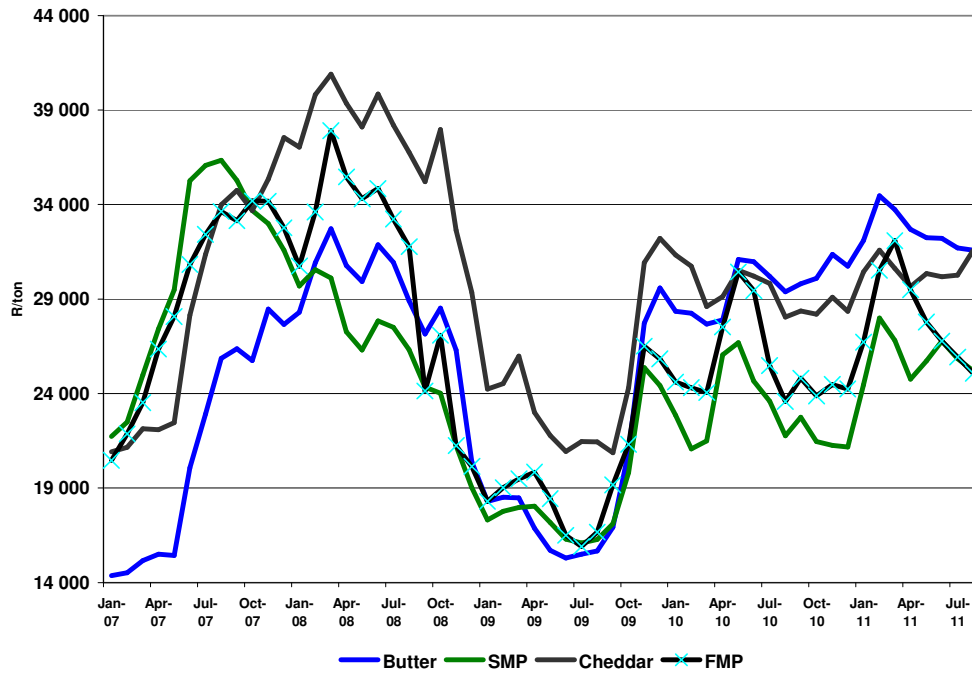
World dairy product prices are given in Table 5 and illustrated in Figure 14.

TABEL 5: MAANDELIKSE INTERNASIONALE PRODUKPRYSE
TABLE 5: MONTHLY INTERNATIONAL PRODUCT PRICES

MAAND/ MONTH	Price US\$/ton				Price Rand/ton		
	Butter	SMP	Cheddar	R/\$	Butter	SMP	Cheddar
Apr-09	1870.0	2000.0	2550.0	902.00	16867.4	18040.0	23001.0
May-09	1875.0	2050.0	2600.0	838.00	15712.5	17179.0	21788.0
Jun-09	1900.0	2025.0	2600.0	805.00	15295.0	16301.3	20930.0
Jul-09	1950.0	2025.0	2700.0	795.00	15502.5	16098.8	21465.0
Aug-09	1975	2050.0	2700.0	794.00	15681.5	16277.0	21438.0
Sep-09	2 250	2 275	2 775	752.00	16 920	17 108	20 868
Oct-09	2 800	2 650	3 250	748.00	20 944	19 822	24 310
Nov-09	3 688	3 375	4 113	752.00	27 730	25 380	30 926
Dec-09	3 950	3 262	4 300	749.00	29 586	24 432	32 207
Jan-10	3 800	3 063	4 200	746.00	28 348	22 846	31 332
Feb-10	3 688	2 750	4 013	766.00	28 246	21 065	30 736
Mar-10	3 725	2 894	3 850	743.00	27 677	21 501	28 606
Apr-10	3800	3 550	3 970	734.00	27 892	26 057	29 140
May-10	4 075	3 500	4 000	763.00	31 092	26 705	30 520
Jun-10	4 050	3 225	3950	765.00	30 983	24 671	30 218
Jul-10	4 000	3 125	3 950	755.00	30 200	23 594	29 823
Aug-10	4 025	2 982	3 842	730.00	29 383	21 769	28 047
Sep-10	4 175	3 187	3975	714.00	29 810	22 755	28 382
Oct-10	4 350	3 100	4 075	692.00	30102	21452	28199
Nov-10	4 500	3 050	4 175	697.00	31365	21 258	29 099
Dec-10	4 500	3 100	4 150	683.00	31 365	21 259	29 100
Jan-11	4 637	3 535	4 400	692.00	30 735	21 173	28 345
Feb-11	4 800	3 900	4 400	718.00	31 995	24 392	30 360
Mar-11	4 875	3 875	4 425	692.00	34 512	28 041	31 636
Apr-11	4 850	3 675	4 400	674.00	34 125	27 125	30 975
May-11	4 700	3 750	4 425	686.00	33 250	26 250	30 975
Jun-11	4 750	3 950	4450	678.00	32 088	24 462	30 448
Jul-11	4 675	3 812	4 463	678.00	34 464	28 002	31 592
Aug-11	4 450	3 550	4 450	710.00	33 735	26 815	30 621

** Voorlopig / Preliminary

FIGUUR 13: Wêreld Suiwelproduk pryse (Rand per ton)
FIGURE 13: WORLD DAIRY PRODUCT PRICES (Rand per ton)



FIGUUR 14: INVOERPARITEIT EN PRODUSENTEPRYS
FIGURE 14: IMPORT PARITY AND PRODUCER PRICE

