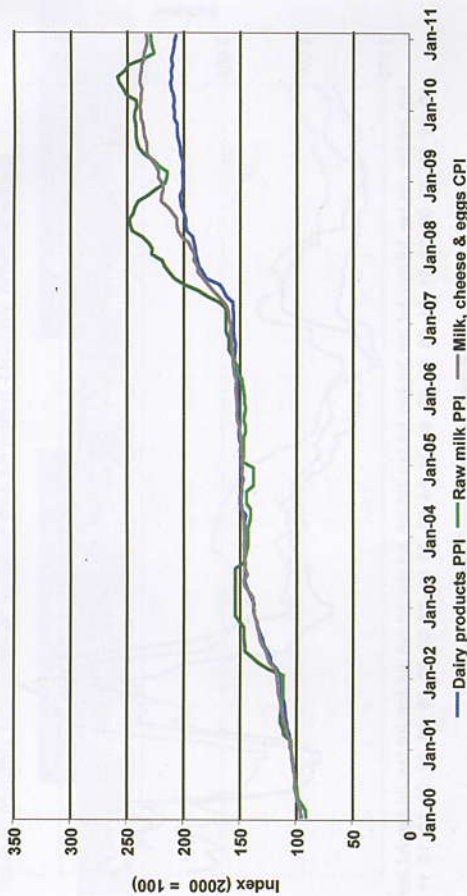


Figuur 12: Prysindexe van roumelk op plaas, suiwelprodukte op vervaardigersvlak en suiwelprodukte en eiers op verbruikersvlak, 2000 – Jan 2011
Figure 12: Price indices of raw milk on farm, dairy products on processor level and dairy products and eggs on consumer level, 2000 – Jan 2011



Source: Stats SA

Tabel 6: Prysindexe van boerderybenodighede, 2009 – 2010

Table 6: Price indices of farm requisites, 2009 – 2010

2005 = 100

Period	Machinery and implements	Material for fixed improvement	Intermediate goods and services	All farming requisites
2010	154,9	142,0	193,5	186,6
CAGR*	9,1%	7,3%	14,1%	13,3%
Apr 09	131,8	144,6	168,6	163,1
Apr 10	152,9	146,6	191,8	185,11
% change	16,0%	1,3%	13,8%	13,8%
Jul 09	135,9	139,1	172,1	166,3
Jul 10	158,1	146,9	195,2	188,6
% change	16,3	5,6	13,4	13,4
Oct 09	139,8	141,9	177,8	171,7
Oct 10	162,4	143,7	201,1	193,8
% change	16,1	1,3	13,1	12,9

Source: Department of Agriculture, Forestry and Fisheries

* Computed annual growth rate, 2009-2010

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Dairy industry REVIEW

A Milk SA publication compiled by the Milk Producers' Organisation

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MELK SUID-AFRIKA/MILK SOUTH AFRICA

Milk production

Meikproduksie

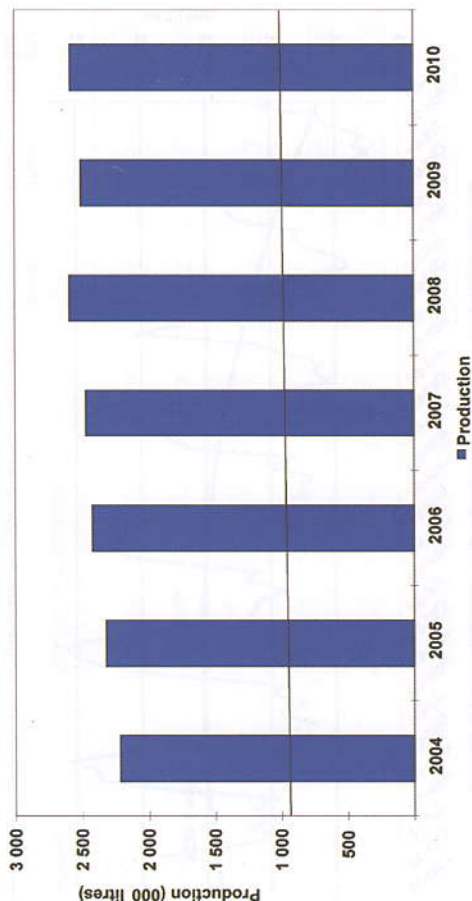
Tabel 1: Maandelikse roumelkproduksie, 2007 – Feb 2011

Table 1: Monthly raw milk production, 2007 – Feb 2011

TYDPERK PERIOD	'000 Litres	PRODUKSIE PRODUCTION	% Change year to year
2007	2 470 345		1,9
2008	2 593 281		5,0
01/09	221 409		1,4
02/09	183 131		-4,0
03/09	192 290		-4,3
04/09	178 542		-3,1
05/09	184 448		-2,1
06/09	175 742		-7,6
07/09	190 041		-3,2
08/09	216 012		0,6
09/09	231 436		-0,4
10/09	248 347		1,5
11/09	238 782		-0,4
12/09	238 877		3,7
2009	2 499 058		-1,3
01/10	225 925		2,0
02/10	191 707		4,7
03/10	204 213		6,2
04/10	190 859		6,9
05/10	197 084		6,9
06/10	188 780		7,4
07/10	208 636		9,8
08/10	228 292		5,7
09/10	241 142		4,2
10/10	256 933		3,5
11/10	246 764		3,3
12/10	244 593		2,4
2010	2 624 929		5,0
1/11	225 060		1,7
2/11	192 090		0,2

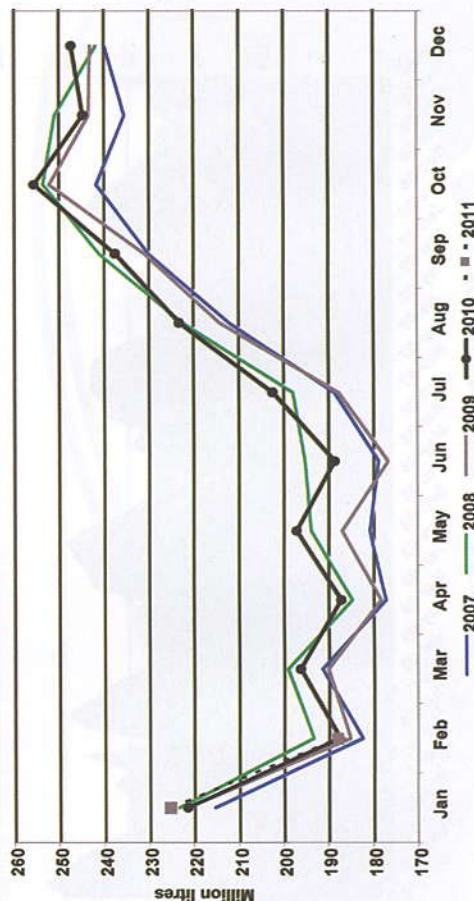
Source: Estimated milk traded for further processing based on statutory returns submitted to Milk SA

Figuur 1: Jaarlikse roumelkproduksie, 2004 – 2010
Figure 1: Annual raw milk production, 2004 – 2010



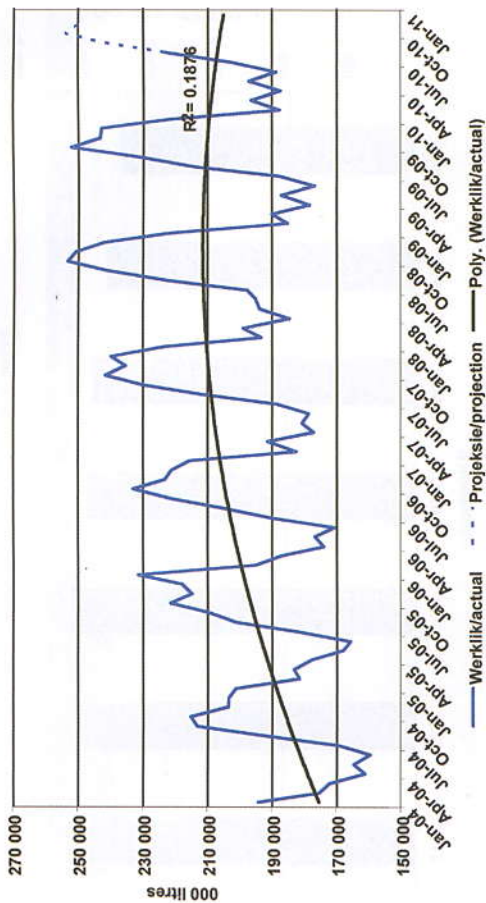
Source: MPO statistics to 2006; Milk SA stats 2007+

Figuur 2: Tendense in maandelikse melkproduksie, 2007 – 2011
Figure 2: Trends in monthly milk production, 2007 – 2011



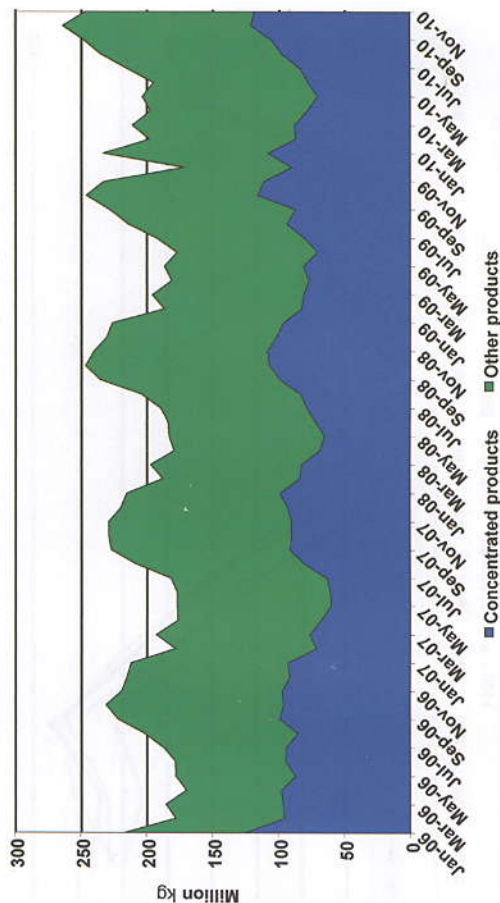
Source: Milk SA

Figuur 3: Langtermyn-tendens in melkproduksie, 2004 – Jan 2011
Figure 3: Long term trend in milk production, 2004 – Jan 2011



Source: MPO and Milk SA statistics

Figuur 4: Aanwending van melk in gekonsentreerde en ander produkte, 2006 – 2010
Figure 4: Utilisation of milk in concentrated and other products, 2006 – 2010



Source: Milk SA statistics

Tabel 2: Jaarlikse invoere (kg), 2008 – 2010*
Table 2: Annual imports (kg), 2008 – 2010*

TOTAL ANNUAL IMPORTS		2008	2009	2010
HEADING	ARTICLE DESCRIPTION			
0401	Milk en room / Milk and cream	12 799 205	10 902 048	11 118 947
0402	Melk, gekonsentreerd / Milk, concentrated	5 852 035	5 385 534	6 771 519
0403	Karringmelk & jogurt / Buttermilk & yoghurt	669 432	1 380 614	1 378 705
0404	Wei & gemodifiseerde wei / Whey & modified whey	7 539 920	6 259 760	7 267 982
0405	Botter & ander melkveite / Butter & other milk fats	2 812 100	3 200 689	2 192 835
0406	Kaas & wrangel / Cheese & curd	4 336 703	5 244 744	6 331 199
	GROOTTOTAAL / GRAND TOTAL	34 009 395	32 373 389	35 061 187

114 986 565 117 204 828 122 460 282

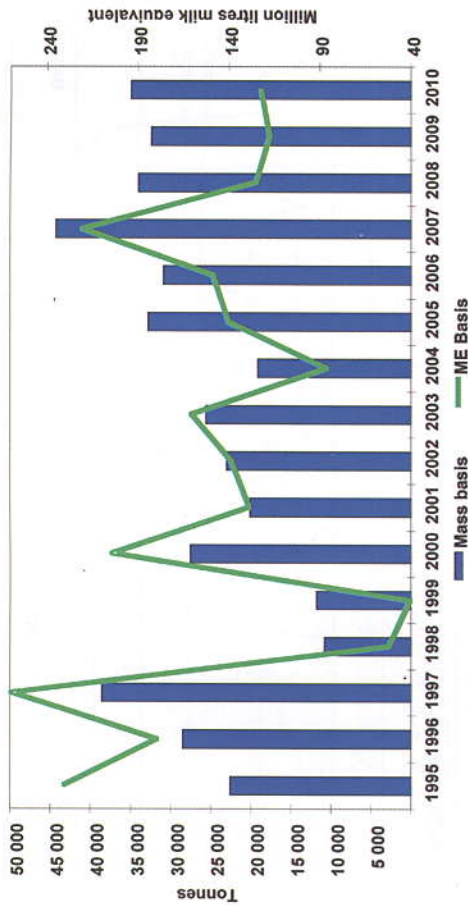
Totaal melk-ekwivalent* (liter)/
 Total milk equivalent* (liter)

* No butter, whey and buttermilk powder taken into account
 * Geen botter, wei- en karringmelkpoeler in ag geneem nie

Source: SARS statistics supplied by SAMPRO

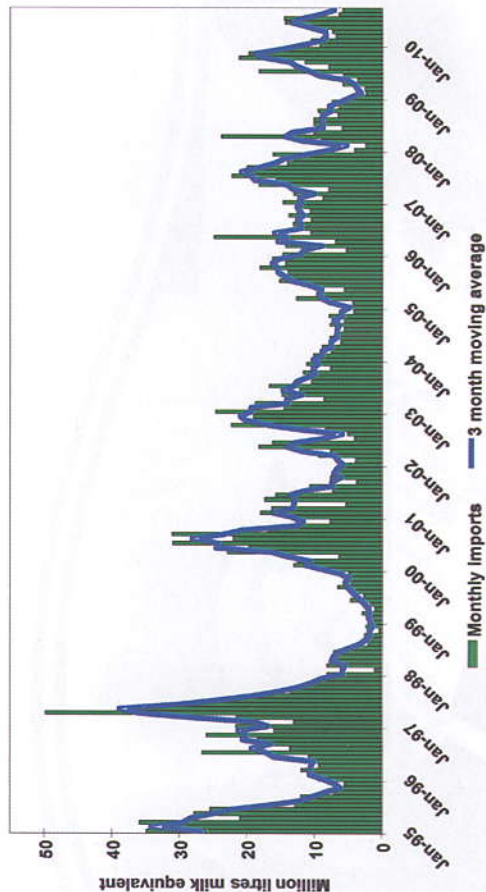


Figuur 5: Jaarlikse invoere van suiwelprodukte, 1995 – 2010
 Figure 5: Annual imports of dairy products, 1995 – 2010



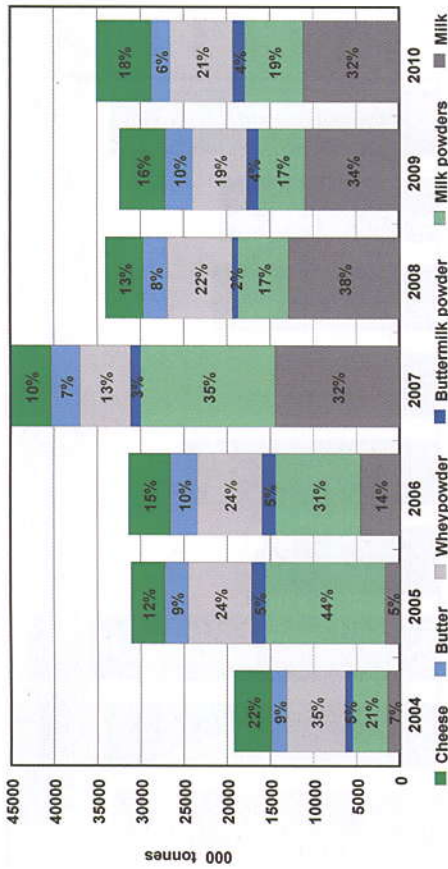
Source: SARS data supplied by SAMPRO

Figuur 6: Maandelikse invoere, melk-ekwivalentbasis, 1995 – 2010
 Figure 6: Monthly imports, milk equivalent base, 1995 – 2010



Source: MPO calculations from SARS data supplied by SAMPRO

Figuur 7: Persentasiesamstelling van invoere (massabasis), 2004 – 2010
 Figure 7: Percentage composition of imports, (mass base), 2004 – 2010



Source: SARS data supplied by SAMPRO

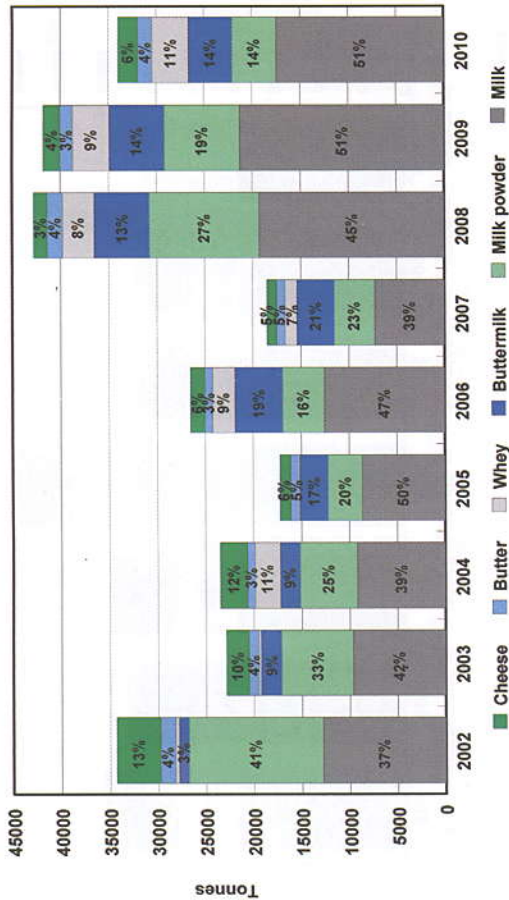
Uitvoerstatistiek

Tabel 3: Jaarlikse uitvoere (ton), 2005 – 2010
 Table 3: Annual exports (tons), 2005 – 2010

Heading Opskrif	Article description Beskrywing	2005	2006	2007	2008	2009	2010
0401	Melk & room / Milk & cream	8 666	12 559	7 277	19 294	21 293	17 451
0402	Melk, gekonsentreerd / Milk, concentrated	3 518	4 367	4 325	11 446	7 864	4 613
0403	Karringmelk & jogurt / Buttermilk & yoghurt	2 969	4 980	3 904	5 743	5 709	4 527
0404	Wei & gemoediseerde wei / Whey & modified whey	137	2 339	1 239	3 298	3 853	3 605
0405	Botter & ander melkvet / Butter & other milk fats	847	771	880	1 565	1 309	1 471
0406	Kaas & wrangel / Cheese & curd	1 079	1 527	979	1 434	1 741	2 083
GROOTTOTAAL /		17 216	26 543	18 564	42 781	41 770	33 950
GRAND TOTAL							

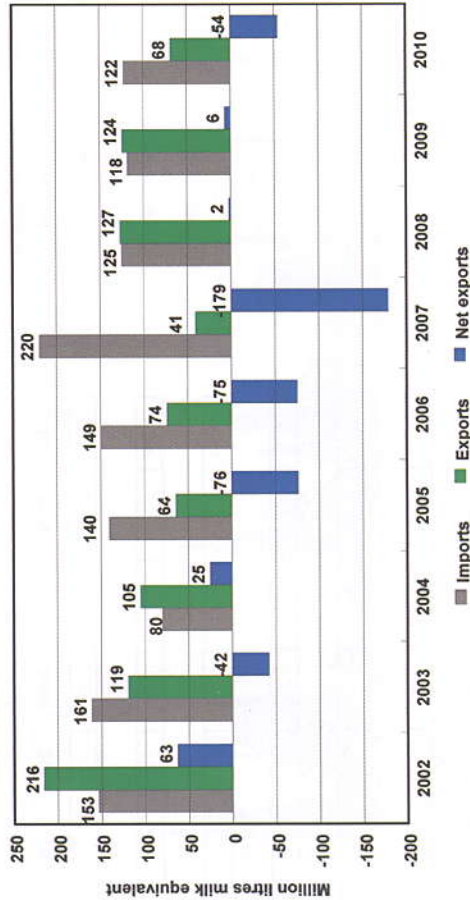
Source: SARS data supplied by SAMPRO

Figuur 8: Samestelling van jaarlikse uitvoere, 2002 – 2010
Figure 8: Composition of annual exports, 2002 – 2010



Source: SARS data supplied by SAMPRO

Figuur 9: Jaarlikse netto uitvoere, melk-ekivalentbasis, 2002 – 2010
Figure 9: Annual net exports, milk equivalent basis, 2002 – 2010



Source: MPO Calculations

Tabel 4: Prysindeks van rou melk op plaasvlak, Jul 2008 – Jan 2011
Table 4: Price Index of raw milk on farm level, Jul 2008 – Jan 2011
(2000 = 100)

Month	Index	% Change	
		M-O-M	Y-O-Y
Jul 08	243,9	-1,4%	22,4%
Aug 08	242,4	-0,6%	16,5%
Sep 08	239,6	-1,2%	12,8%
Oct 08	231,0	-3,6%	6,7%
Nov 08	224,3	-2,9%	2,6%
Dec 08	216,3	-3,6%	-5,1%
Jan 09	214,6	-0,8%	-5,7%
Feb 09	213,9	-0,3%	-7,3%
Marr 09	222,1	3,8%	-6,0%
Apr 09	226,8	2,1%	-7,4%
May 09	234,7	3,5%	-4,9%
Jun 09	239,1	1,9%	-3,3%
Jul 09	240,8	0,7%	-1,3%
Aug 09	241,6	0,3%	-0,3%
Sep 09	241,8	0,1%	0,9%
Oct 09	241,9	0,1%	4,7%
Nov 09	243,2	0,5%	8,4%
Dec 09	242,9	-0,1%	12,3%
Jan 10	241,3	-0,6%	12,5%
Feb 10	241,4	0,1%	12,9%
Marr 10	250,5	3,8%	12,8%
Apr 10	253,5	1,2%	11,8%
May 10	256,8	1,3%	9,3%
Jun 10	258,2	0,5%	8,0%
Jul 10	252,1	-2,4%	4,7%
Aug 10	248,5	-1,4%	2,8%
Sep 10	236,0	-5,0%	-2,4%
Oct 10	226,0	-4,2%	-6,6%
Nov 10	227,5	0,7%	-6,4%
Dec 10	228,3	0,3%	-6,0%
Jan 11	228,8	0,2%	-5,2%

Source: Stats SA, rebased on 2000 = 100

Internasionale omgewing

International environment

Table 5: Maandelikse internasionale gemiddelde vry-aan-board, Oseania-produkpryse
Table 5: Monthly international average free on board, Oceanic product prices

Month	Price US\$/tonne*			ZAR c / US\$**	Price Rand/tonne***		
	Butter	SMP	Cheddar		Butter	SMP	Cheddar
Nov 08	2 600	2 100	3 225	1 012	26 306	21 247	32 630
Dec 08	2 050	1 913	2 950	995	20 398	19 029	29 353
Jan 09	1 850	1 750	2 450	989	18 297	17 308	24 231
Feb 09	1 850	1 775	2 450	1 001	18 519	17 768	24 525
Mar 09	1 850	1 800	2 600	999	18 482	17 982	25 974
Apr 09	1 870	2 000	2 550	902	16 867	18 040	23 001
May 09	1 875	2 050	2 600	838	15 713	17 179	21 788
Jun 09	1 900	2 025	2 600	805	15 295	16 301	20 930
Jul 09	1 950	2 025	2 700	795	15 503	16 099	21 465
Aug 09	1 975	2 050	2 700	794	15 682	16 277	21 438
Sep 09	2 250	2 275	2 775	752	16 920	17 108	20 868
Oct 09	2 800	2 650	3 250	748	20 944	19 822	24 310
Nov 09	3 688	3 375	4 113	752	27 730	25 380	30 926
Dec 09	3 950	3 262	4 300	749	29 586	24 432	32 207
Jan 10	3 800	3 063	4 200	746	28 348	22 846	31 332
Feb 10	3 688	2 750	4 013	766	28 246	21 065	30 736
Mar 10	3 725	2 884	3 850	743	27 677	21 501	28 606
Apr 10	3 800	3 550	3 970	734	27 892	26 057	29 140
May 10	4 075	3 500	4 000	763	31 092	26 705	30 520
Jun 10	4 050	3 225	3 950	765	30 983	24 671	30 218
Jul 10	4 000	3 125	3 950	755	30 200	23 594	29 823
Aug 10	4 025	2 982	3 842	730	29 383	21 769	28 047
Sep 10	4 175	3 187	3 975	714	29 810	22 755	28 382
Oct 10	4 350	3 100	4 075	692	30 102	21 452	28 199
Nov 10	4 500	3 050	4 175	697	31 365	21 259	29 100
Dec 10	4 500	3 100	4 150	690	31 050	21 390	28 635
Jan 11****	4 600	3 415	4 350	680	31 280	23 222	29 580

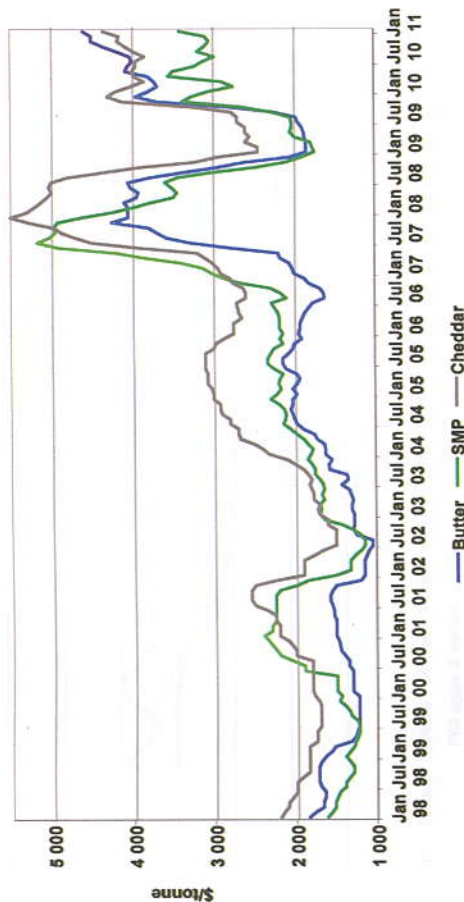
Source: *USDA (www.usda.gov)

**SA Reserve Bank

*** Converted with SA Reserve Bank Monthly middle rates.

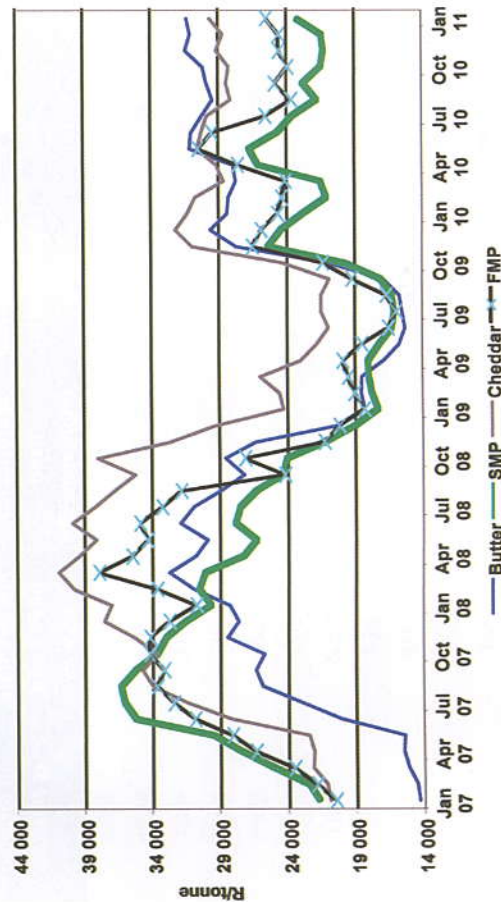
**** Last months average of daily rates quoted by Safex.

Figuur 10: Internasionale suiwelprodukpryse (VSAS per ton, VAB), 1998 – Jan 2011
Figure 10: International dairy product prices (USAS per tonne, FOB), 1998 – Jan 2011



Source: USDA reported average free on board prices for oceanic dairy products

Figuur 11: Internasionale suiwelprodukpryse (R/ton), 2007 – Jan 2011
Figure 11: International dairy product prices (R/tonne), 2007 – Jan 2011



Source: USDA reported average free on board prices for Oceanic dairy products, converted with Reserve Bank monthly middle rates