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THE SUPPLY OF MILK AND DAIRY PRODUCTS OF THE WORLD

The world dairy sector has developed very dynamically in the last few years. Moreover the expected changes in agricultural policy (WTO, etc) and the technology for dairy farming and processing will lead to significant shifts in production shares around the globe. The aim of this study is to summarise in an “easy” way the status of world milk production and processing.

The dairy sector with its complexity of milk types (cow, buffalo, etc.), its various milk production systems and the wide range of dairy products requires a significant level of data and methods. Unfortunately the databases available do not match with the needs especially if a global review is required.

Milk is produced almost in all countries of the world. The EU and South Asia (India, Pakistan) are the most important milk producing regions and cover more than 42% of world milk production. The USA represents 13% and Oceania (Australia and New Zealand) only 4.1%. Most countries in the world are not self sufficient in milk production. The milk surplus (net export) regions are North America, Europe, Oceania and the countries Argentina, Chile, Uruguay.

World dairy exports are dominated by Oceania and the EU, which cover around 80% of the exports.

Major import countries are: Japan, China, Mexico, Algeria, Brazil, Saudi-Arabia, Russia and a wide range of countries in Southeast Asia. As mentioned in several studies, the world dairy market is very small. Only around 7% of milk produced is traded in the form of dairy products. Nevertheless around 22% of the tradable products produced (butter, dry products, cheese, condensed milk) are traded between countries.

Among the countries the processing structure differs significantly. High shares of tradable products are produced in most of the European countries as well as in Australia and New Zealand. In general, the share of milk processed into tradable dairy products is low in developing countries, like Asia, Africa and selected countries in Latin America.

The milk processing sector is in a continuous progress of change, with an increasing speed. Investment activities are mainly done by private companies on the domestic market. Per year, around 150 investment activities in the dairy industries are being observed; the mostly affected product group was cheese.

Milk supply responses measured in elasticities are found in a wide range for countries, whereby values differ significantly within the countries. This study has identified a significant uncertainty in this field, which lead to an uncertainty about the economic models applied for trade policy analysis.

The conclusions drawn here sum up the existing knowledge from the farming and milk supply side. The dairy market research and dairy policy would be quite useful to come to more solid projections about the future.