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Peru Milk and Dairy Products Market Outlook to 2015

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Abstracts

The Report titled “Peru Milk and Dairy Products Market Outlook to 2015” provides a comprehensive analysis of the milk and dairy products industry in Peru. The report covers the total cow milk production, fluid milk consumption, segmentation on the basis of dairy products such as butter, cheese, skim milk powder, milk drinks and fermented products, cream, condensed milk and whey powder and volume of net trade for dairy products. It offers prevalent trends and developments in the industry, future opportunities and competitive landscape of the prominent players operating in the country. The report also includes information on the major macroeconomic indicators regressed for estimating the market for milk and dairy products in Peru.

The production of cow milk increased in Peru at a CAGR of 16.2% during the period from 2007-2009. Peru is the 5th largest contributor of cow milk production in Latin America with the milk production of 1,878 thousand tonnes and market share of 3.1% in 2009. By 2015, the market share is expected to increase further and will reach 4.1% and 2,990 thousand tonnes in volume terms.

Although, the country has witnessed an increase in the milk production along with the investments in this sector in the last few years, the country is still a net importer of milk and dairy products.

The primary reasons for an increase in production are better communications between the dairy processors and distant upland producers, increased number of dairy farms and an increase in the average yield in the cow milk production.

The milk prices have increased in greater proportion than feed prices in Peru which has resulted in a positive farm’s earning. In the future, it is possible to reduce the feed prices further if the infrastructure especially the road network is improved.

In 2009, Arequipa was the biggest region in terms of milk production accounting for 22% of the milk production followed by Cajamarca and Lima with 18% and 17% respectively. Other regions such as La Liberated and Amazonas accounted for 6% and 5% of the milk production.

The use of milk in dairy products rose tremendously in the historical period. In 2007, the use of milk in dairy products was 677 thousand tonnes. In 2008, the utility increased by 20.1% and reached 813 million tonnes. During the period from 2007-2009, a CAGR of 25.4% was registered. In the forecasted period, the production is expected to grow at a CAGR of 10.2% during the period from 2009-2015.

The production of cheese contributed just 3% of the total dairy products production in 2009. The market for cheese is expected to register a decline in the future as the market is not lucrative for cheese production. Cheese is more likely to be imported from other countries as it is cheaper to import rather than to produce. The cheese production registered an increasing CAGR of 18.3% during the period from 2007-2009, rising from 10 thousand tonnes in 2007 to 14 thousand tonnes in 2009. The market is expected to increase further in 2010 by 1 thousand tonnes. Henceforth, the market is expected to register a downward trend in the production.

Peru is one of the significant contributors of condensed milk from the Latin American region apart from Brazil and Chile. Majority of the producers focuses on this segment as compared to other segments. The production accounted for 91% of the total dairy products production. The availability of fresh milk for manufacturing condensed milk has increased phenomenally over time.

Condensed milk is the largest sub segment of the dairy products industry in Peru. The production remained constant from 389 thousand tonnes in 2007 to 2008 and then declined to 360 thousand tonnes in 2009. The production is expected to decline further by 2.3% and reach 352 thousand tonnes in 2010. However from 2011 onwards, the production is expected to increase further and reach 439 thousand tonnes in 2015.

The consumption of whole milk powder increased from 9 thousand tonnes in 2007 to 13 thousand tonnes in 2008, an increase of 44.4%. In 2009, the consumption declined by 15.4% to reach 11 thousand tonnes. The consumption of whole milk powder will increase at a CAGR of 9.5% from 2009-2015. The consumption is projected to increase from 11 thousand tonnes in 2009 to 19 thousand tonnes in 2015.

Scope of Research

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The report will entail thorough analysis and valuable insights on the milk and dairy products industry in Peru. The scope of the report includes:

The total Peruvian market of cow milk production and fluid milk consumption by volume, 2007 to 2015.

The Peruvian milk cow numbers and milk production per cow, by volume, 2007 to 2015.

The Peruvian dairy production by volume for butter, cheese, skim milk powder, milk drinks and fermented products, cream, condensed milk and whey powder, 2007 to 2015.

The Peruvian dairy consumption by volume for butter, cheese, skim milk powder, whole milk powder, 2007 to 2015.

Current statistics and Projections of the various Macro Economic Indicators, 2009 to 2015 for Peru.

Competitive Landscape of the major companies (Gloria, Nestle and Alicorp), key trends and developments and future outlook of the milk and dairy products industry in Peru.

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