

Uruguay Milk and Dairy Products Market Outlook to 2015

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Abstracts

The Report titled “Uruguay Milk and Dairy Products Market Outlook to 2015” provides a comprehensive analysis of the milk and dairy products industry in Uruguay. 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 Uruguay.

Milk production in Uruguay accounted for 0.3% of the total world production and 2% of the world exports. The milk production in the country has increased 3% annually over the last decade and 4% over the last five years. An individual in Uruguay consumes on a yearly average, 219 litres of milk and milk products which is equal to the level of some of the developed countries in the world. Liquid milk is one of the chief products consumed with an annual consumption of 368 thousand tonnes.

Milk production in Uruguay is largely concentrated in the southern part of the country. Although the milk production is increasing in Uruguay, there is still a considerable technological gap in certain sized farms in the country leading to a significant per hectare productivity gap amongst the various sizes of farms. The major factors accounted for such kind of differences include dearth of scale, land ownership, low investment level and apprehension for new technologies.

2/3rd of the production is sold to the international markets including Brazil (27%), Mexico (17%), Venezuela (11%), Cuba (6%) and South Korea (5%). Exports are

primarily been concentrated in the Latin American region due to the difficulties of scale, and shortcomings in marketing and product presentation and limited know-how in trading to additional-regional markets. Major exported dairy products are milk powder, skim milk powder, cheese and butter. There are several customized dairy products and market niches such as kosher, halal, flavored cheese and organic products which have not been explored in the country. The dairy industry in Uruguay has considerable competitive advantages and present investment opportunities in both primary and industrial production periods. Approximately 98% of the dairy products consumption is met by the domestic production in the country.

Butter constitutes nearly 12% of the total dairy products production in 2009. Cheese and powdered milk accounted for the major proportion of the production in Uruguay. Though, the production of butter and ghee has increased in the past and is expected to increase in the future, the growth rate has reduced over time due to the producers shift of focus on other dairy products segment.

The production of butter in the country increased at a CAGR of 10.6% from 2007-2009. The production increased from 18 thousand tonnes in 2007 to 22 thousand tonnes in 2009. In 2009, an increase of 29.4% was recorded compared to decrease in the growth observed in 2008. In the future period, the production is set to increase at a CAGR of 2.8% from 2009-2015.

Cheese consumption has increased manifold in the last decade. The demand of several specialty cheeses has led to the development of niche sub-market in the industry. The number of consumers and per capita consumption of cheese has increased over time. The need to consume new varieties of cheeses with different flavors and textures in convenient packages has driven the growth in consumption. The specialty cheeses segment has been the chief driver of per capita consumption. The consumption of semi-firm and soft cheese has increased internationally. The domestic cheese consumption has increased marginally during the historical period. The consumption increased from 10 thousand tonnes in 2007 to 11 thousand tonnes in 2009 at a CAGR of 4.9%.

The export level powdered milk has inclined over time. The low prices provided by Uruguay relative to other countries prices of domestic production is the major reason behind this incline. Countries such as Brazil and Mexico import a heavy proportion of their skim milk powder from Uruguay. The net trade level was registered at 12 thousand tonnes in 2009.

Scope of Research

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

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

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

The Uruguayan 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 Uruguayan 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 Uruguay.

Competitive Landscape of the major companies (Conaprole and Ecolat Uruguay), key trends and developments and future outlook of the milk and dairy products industry in Uruguay.

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