

Swiss Dairy Economy in figures

2019/20



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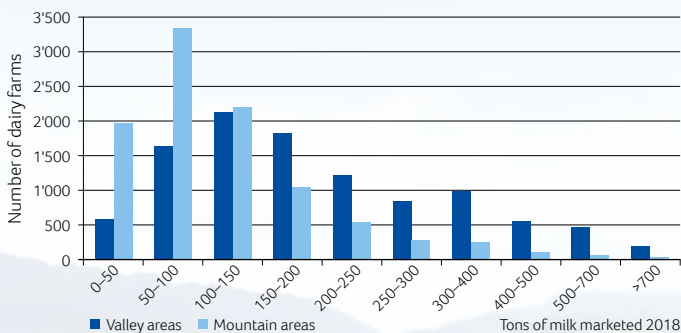
swissmilk

Overview

All-year businesses (summering businesses excluded)		2017	2018	Change 17/18	
				absolute	in percent
Producers	number	20'372	19'735	-637	-3.1%
Average delivery	kg	163'019	168'967	5'948	3.6%
Average size of businesses	ha	26.4	26.8	0.4	1.5%
Average of milk quantity sold per ha (1 ha = 2.47 acres)	kg	6'171	6'303	131	2.1%
Average milk supply per cow	kg	6'244	6'341	96	1.5%

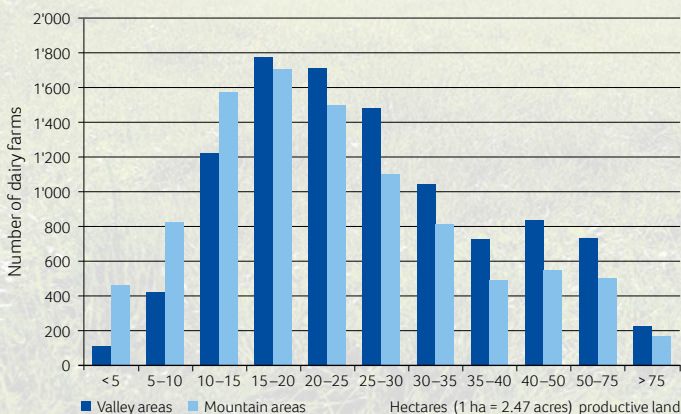
Source: Milk statistics

Dairy farms according to quantity of milk production



Source: TSM Treuhand GmbH

Dairy farms according to size categories (2018)



Source: TSM Treuhand GmbH

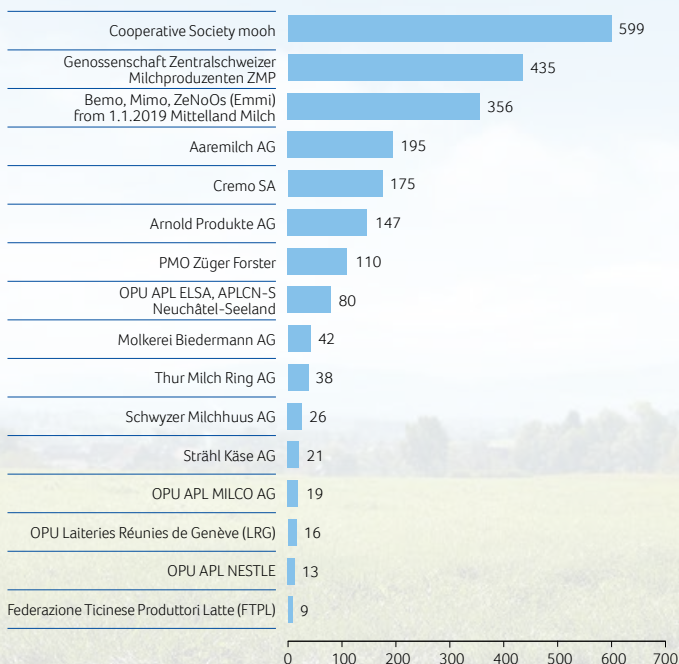
Milk performance from cattle of the herd book

Breeds	2015/16	2016/17	2017/18	Change 17/18		
				kg	kg	kg
Standard lactation						
Brown cattle	7'078	7'171	7'184	13	0.2%	
Red Holstein	8'062	8'140	8'127	-13	-0.2%	
Holstein*	8'838	8'813	8'984	171	1.9%	
Fleckvieh cattle	7'028	7'098	7'100	2	0.0%	
Simmental	5'767	5'940	5'879	-61	-1.0%	
Montbéliarde	7'553	7'608	7'472	-136	-1.8%	
Jersey	5'624	5'718	5'765	47	0.8%	
Herens	3'326	3'499	3'361	-138	-3.9%	

Source: Milk statistics

* Calendar year 2018

Traded quantity of dairy milk (initial milk purchase) 2018 in millions of kilograms



Source: Swiss Milk Producers SMP

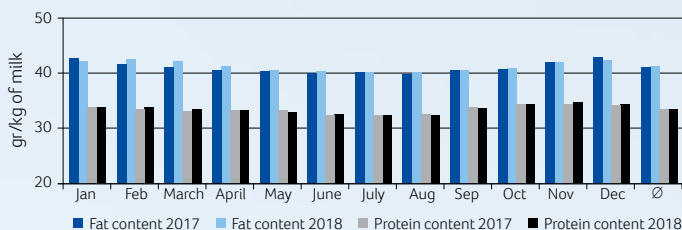
Milk price

Type of milk	2016	2017	2018	Change 17/18	
				cents/kg	cents/kg
Industrial milk	54.51	56.42	57.84	1.42	2.5%
Milk processed to artisanal cheese*	71.26	71.14	72.59	1.45	2.0%
Organic milk	78.29	80.36	82.34	1.98	2.5%

Source: Market report,
Federal Office for Agriculture FOAG

* bonus for silage-free production excluded

Development of fat and protein content



Source: TSM Treuhand GmbH

Milk processing

Products	2016	2017	2018	Change 17/18	
	tons ME*	tons ME*	tons ME*	absolute	in percent
Cheese	1'417'552	1'474'792	1'492'848	18'056	1.2%
Curd cheese	30'880	26'735	26'746	11	0.0%
Fresh milk	388'647	384'258	382'614	-1'644	-0.4%
Cream	282'867	283'930	280'933	-2'997	-1.1%
Yoghurt	111'776	116'532	118'272	1'740	1.5%
Other fresh-milk products, ice cream included	102'006	94'452	100'307	5'855	6.2%
Durable dairy goods	374'270	370'509	379'814	9'305	2.5%
Butter	549'093	516'547	542'593	26'046	5.0%
Other uses	176'884	166'257	130'301	-35'956	-21.6%
Total	3'433'975	3'434'012	3'454'428	20'416	0.6%

Source: TSM Treuhand GmbH

* ME: Milk equivalents contents of 1 kg of milk based on protein (45%) and fat contents (55%)

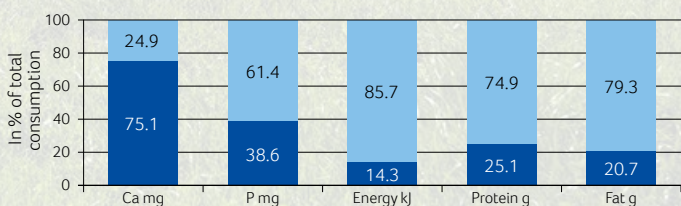
Per capita consumption in kilograms

Products	2016	2017	2018	Change 17/18	
	kg/capita	kg/capita	kg/capita	absolute	in percent
Fresh milk*	53.3	51.8	51.2	-0.5	-1.1%
Milk drinks	9.6	7.6	8.2	0.6	8.4%
Yoghurt	16.6	17.7	17.8	0.0	0.2%
Butter	5.2	5.2	5.4	0.2	4.2%
Cream	7.9	7.8	7.9	0.1	1.0%
Cheese and processed (soft) cheese	21.6	21.4	21.7	0.3	1.5%

Source: Milk statistics

* without milk for self-sufficiency

Contribution of milk to the supply of minerals and nutrients

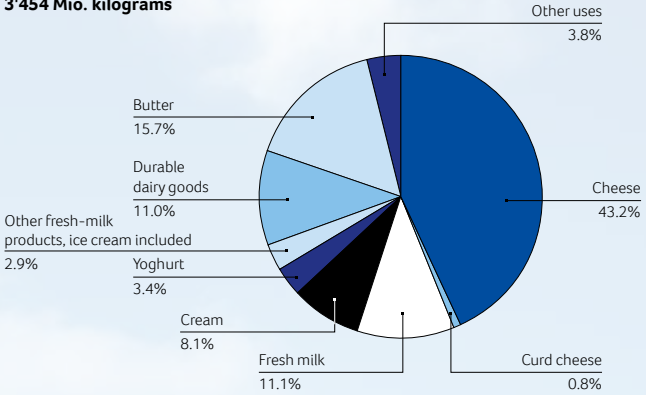


Source: Food balance 2017, Agristat

■ Other plant and animal foods
■ Milk and milk products

Milk processing: processing share in milk equivalents (ME)

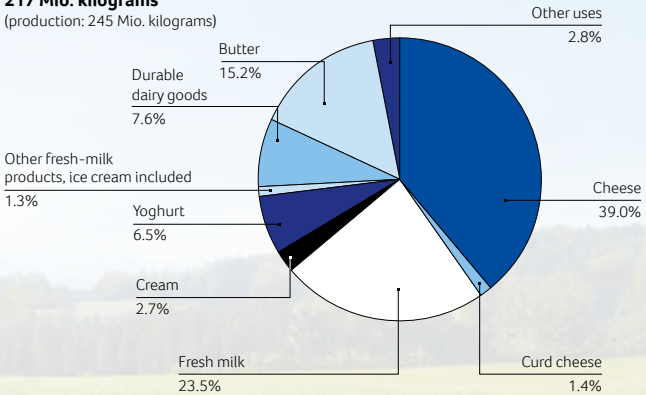
Total milk processing 2018:
3'454 Mio. kilograms



Organic milk processing

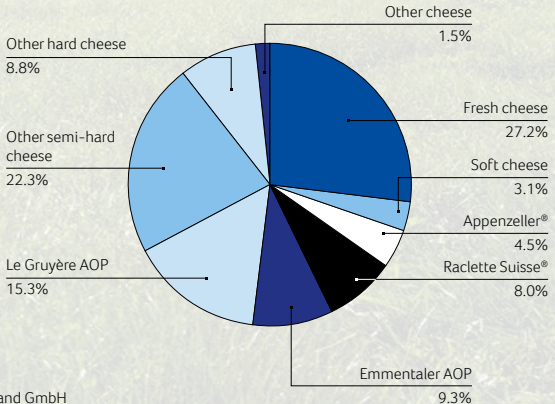
Total organic milk processing 2018:
217 Mio. kilograms

(production: 245 Mio. kilograms)



Cheese production

Total cheese production 2018:
191'321 tons



Foreign trade balance in mio. of whole milk equivalents WME *

Imports	2016	2017	2018	Change 17/18	
	WME	WME	WME	absolute	in percent
Fresh milk	25.0	25.5	24.2	-1.3	-5.1%
Cream	6.0	5.2	5.3	0.1	1.7%
Yoghurt	8.1	7.8	7.4	-0.5	-5.9%
Fresh milk products	0.7	0.5	0.6	0.1	26.2%
Milk & cream powder	44.0	42.7	49.1	6.4	14.9%
Milk protein products	0.3	0.2	0.3	0.1	35.8%
Butter	6.4	7.1	8.1	0.9	13.0%
<i>Fresh cheese</i>	<i>65.6</i>	<i>71.7</i>	<i>76.2</i>	<i>4.5</i>	<i>6.2%</i>
<i>Soft cheese</i>	<i>41.1</i>	<i>41.1</i>	<i>40.4</i>	<i>-0.7</i>	<i>-1.7%</i>
<i>Semi-hard cheese</i>	<i>53.8</i>	<i>55.6</i>	<i>56.1</i>	<i>0.5</i>	<i>0.9%</i>
<i>Hard-cheese</i>	<i>59.1</i>	<i>59.2</i>	<i>62.4</i>	<i>3.2</i>	<i>5.3%</i>
Cheese	219.6	227.7	235.1	7.4	3.3%
Other food**	136.6	132.6	134.3	1.7	1.3%
Total imports in mio. WME	446.7	449.3	464.3	15.0	3.3%
Exports					
Fresh milk	2.9	2.7	2.7	0.0	0.0%
Cream	11.6	10.7	5.1	-5.6	-52.2%
Yoghurt	3.9	3.6	3.4	-0.2	-6.5%
Fresh milk products	28.3	28.1	18.4	-9.8	-34.7%
Milk & cream powder	79.8	44.3	60.8	16.4	37.1%
Milk protein products	16.9	14.0	10.9	-3.1	-22.4%
Butter	70.6	34.8	18.8	-16.0	-45.9%
<i>Fresh cheese</i>	<i>21.1</i>	<i>22.8</i>	<i>22.0</i>	<i>-0.8</i>	<i>-3.7%</i>
<i>Soft cheese</i>	<i>2.1</i>	<i>3.4</i>	<i>2.8</i>	<i>-0.5</i>	<i>-15.6%</i>
<i>Semi-hard cheese</i>	<i>90.1</i>	<i>90.3</i>	<i>94.5</i>	<i>4.2</i>	<i>4.7%</i>
<i>Hard-cheese</i>	<i>206.7</i>	<i>209.5</i>	<i>212.0</i>	<i>2.5</i>	<i>1.2%</i>
Cheese	319.9	325.9	331.3	5.4	1.6%
Other food**	318.5	336.1	354.4	18.3	5.4%
Total exports in mio. WME	852.4	800.2	805.7	5.5	0.7%
Balance (exp.-imp.) in mio. WME	405.7	350.9	341.4	-9.5	-2.7%

* The milk products are converted according to content of usable energy in millions of whole milk equivalents (WME). One WME corresponds to one kg whole cow's milk with a usable energy of 2800 kilojoules (kJ). ** Products and food preparations in accordance General Directorate of customs «other customs chapters». Source: Milk statistics

Milk price international

Countries	2014	2015	2016	2017	Change 16/17	
	cents/kg	cents/kg	cents/kg	cents/kg	absolute	in percent
EU 28	45.26	32.93	30.99	38.73	7.74	25.0%
Germany	45.64	31.28	29.14	40.22	11.08	38.0%
France	43.09	32.05	31.09	36.02	4.93	15.8%
Italy	48.15	37.03	34.88	41.14	6.27	18.0%
Austria	47.93	36.03	34.16	41.63	7.48	21.9%
USA	48.42	36.28	35.40	38.21	2.80	7.9%
New Zealand	42.00	21.27	25.61	40.10	14.49	56.6%

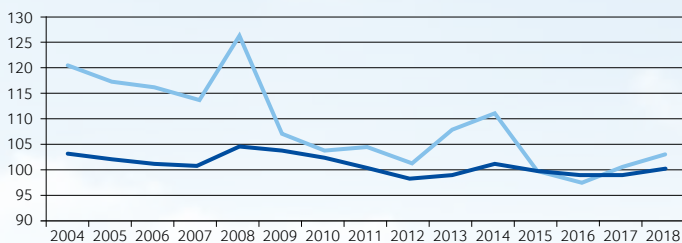
Source: International Dairy Federation IDF 2018; exchange rates for conversion: Swiss National Bank

Per capita consumption international in 2017

Countries	Milk kg/capita	Butter kg/capita	Cheese kg/capita
Switzerland	56.1	5.2	21.5
EU 28	60.7	3.8	18.7
Germany	53.4	5.9	24.3
France	47.4	8.0	26.4
Italy	47.5	2.6	22.2
Belarus	75.2	3.9	14.7
Brazil	48.9	0.4	3.8
USA	67.2	2.6	17.0

Source: International Dairy Federation (IDF) 2018

Price product index of the marketed milk (PPI) compared to consumer price index (CPI milk) of milk and dairy products

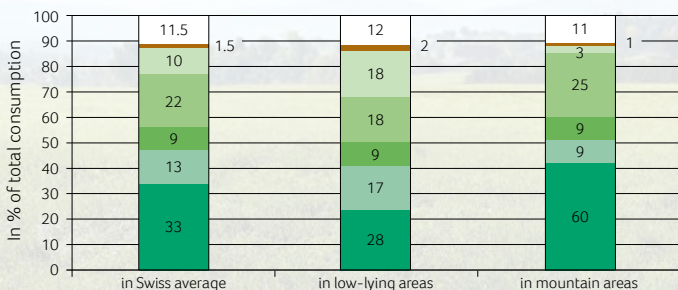


Source: Swiss Federal Statistical Office (BFS), Milk statistics
December 2015: 100 points

basis 2015

■ PPI Marketed milk (raw milk) ■ CPI milk

Annual ration of a Swiss dairy cow (proportions in dry material)



Source: S. Ineichen, B. Reidy HAFU, 2015

■ Hay ■ Grass silage ■ Forage ■ Pasture
■ Maize ■ Fodder beet, grains, potatoes ■ Concentrated feed

More Information

More documentations and statistics at:

























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milchindustrie.ch
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Berne, august 2019

Companies processing milk

Dairy milk	Processed quantity of milk 2018	Turnover 2018	Logo
Emmi AG	892 Mio. kg	CHF 1'713 Mio.	
Crema SA	407 Mio. kg	CHF 475 Mio.	
M-Industrie dairy products (elsa-mifroma)*	400 Mio. kg		
Hochdorf Swiss Nutrition AG	284 Mio. kg	CHF 561 Mio.	
Züger Frischkäse AG	160 Mio. kg		
Nestlé Suisse SA	123 Mio. kg		
Laiteries Réunies de Genève (LRG)	40 Mio. kg	CHF 57 Mio.	
Strähl Käse AG	35 Mio. kg		
Lati SA	10 Mio. kg		
Cheese dairy milk	Processed quantity of milk 2018	Number of cheese dairies 2018	Logo
Le Gruyère AOP (alpage incl.)	328.3 Mio. kg	226	
Emmentaler AOP	215.5 Mio. kg	119	
Raclette Suisse®	151.8 Mio. kg	25	
Appenzeller®	88.3 Mio. kg	48	
Tête de Moine AOP	30.6 Mio. kg	8	
Tilsiter Switzerland®	27.5 Mio. kg	21	
Vacherin Fribourgeois AOP	26.6 Mio. kg	101	
Raclette du Valais AOP **	24.0 Mio. kg	76	
Sbrinz AOP	19.2 Mio. kg	26	
Bündner Bergkäse	9.8 Mio. kg	9	
Vacherin Mont d'Or AOP	3.9 Mio. kg	10	
Schweizer Alpkäse®	59.0 Mio. kg	1'364	
<i>of which Berner Alp- & Hobelkäse AOC</i>	<i>12.5 Mio. kg</i>	<i>469</i>	
<i>of which Le Gruyère d'alpage AOP</i>	<i>6.5 Mio. kg</i>	<i>55</i>	
<i>of which L'Etivaz AOC</i>	<i>4.5 Mio. kg</i>	<i>67</i>	
<i>of which formaggio d'alpe ticinese DOP</i>	<i>3.7 Mio. kg</i>	<i>89</i>	