Embrapa

Lorildo A. Stock

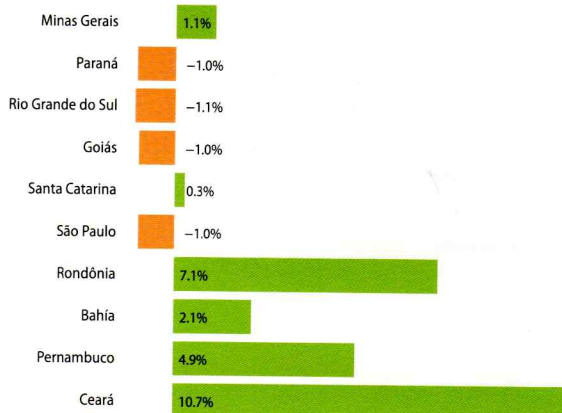## Status and key developments

Status 2020

- No. **4** (↑ 1) in the world milk production: **35** mill t SCM
- Number of dairy farms: **1,140,620**
- Milk price: **+1%** to world market
- Feed price: **+10%** to world market

Key developments 2015 — 2020

- Milk production **increased** by **+0.5%** per year
- Farm number **decreased** by **-1.1%** per year
- Milk yield **increased** by **+6.8%** per year
- Top herd size class growth: **> 200** cows/farm: CAGR **+6.5%**

Top 10 regions - avg. annual milk production growth

2015 - 2020 - regions represent 89% of national milk production in 2020

Region	Growth
Minas Gerais	1.1%
Paraná	−1.0%
Rio Grande do Sul	−1.1%
Goiás	−1.0%
Santa Catarina	0.3%
São Paulo	−1.0%
Rondônia	7.1%
Bahía	2.1%
Pernambuco	4.9%
Ceará	10.7%

Key variables

	1996	2000	2004	2007	2010	2012	2014	2016	2018	2019	2020	Annual change '10-'15	Annual change '15-'20
Milk production (cows')													
Production (mill t SCM)	17.27	18.43	21.89	25.74	30.25	31.82	34.59	33.17	33.40	34.32	35.00	+2.4%	+0.5%
Cows (in 1,000's)	16,274	17,885	20,023	21,122	22,925	22,804	23,028	19,559	16,353	16,271	15,603	-1.6%	-5.9%
Milk yield (t SCM/cow)	1.06	1.03	1.09	1.22	1.32	1.40	1.50	1.70	2.04	2.11	2.24	+4.1%	+6.8%
Farm structure													
No. of dairy farms (in 1,000's)	1,810	1,605	1,430	1,332	1,279	1,247	1,217	1,189	1,164	1,152	1,141	-1.2%	-1.1%
Average farm size (cows / farm)	9.0	11.1	14.0	15.9	17.9	18.3	18.9	16.4	14.1	14.1	13.7	-0.4%	-4.9%
Prices in national currency													
Milk : feed price ratio	1.61	1.29	1.31	1.53	1.70	1.39	1.65	1.47	1.65	1.72	1.50	-2.6%	+0.2%
Cull cow (BRL / live weight)	0.40	0.74	1.11	1.17	1.96	2.10	2.85	3.82	3.39	3.73	5.63	+12.7%	+9.6%
Land - buy (BRL / ha)	3,259	3,504	9,239	11,685	15,017	18,181	24,714	26,624	26,008	26,038	27,157	+12.4%	+0.1%
Devaluation of BRL vs USD	+232%	+82%	+14%	+72%	+89%	+71%	+42%	-4%	-9%	-15%	-35%	-17.7%	-7.1%

Farm structure
% of dairy farms and cows in size classes (2020)

- Farms per size class
- Cows per size class
- IFCN Typical Farms
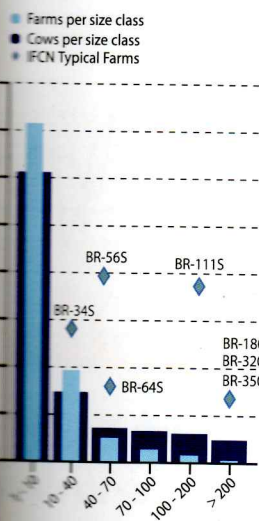
Farm structure
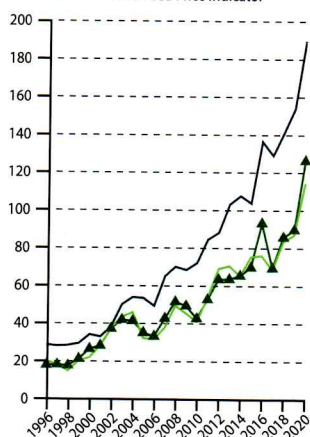% of cows per herd size

- 1 - 10
- 10 - 40
- 40 - 70
- 70 - 100
- 100 - 200
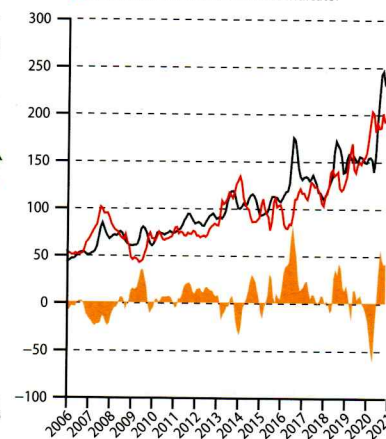- > 200
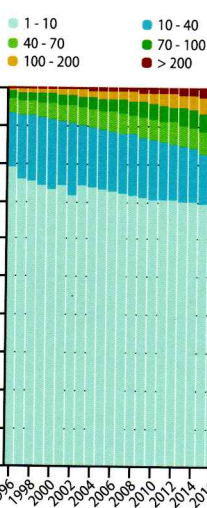
Milk and feed price
BRL / 100 kg

- National farm gate milk price (SCM)
- National feed price
- IFCN World Feed Price Indicator

Monthly farm gate milk price
BRL / 100 kg SCM

- Distance nat. price vs. world price in BRL
- National farm gate milk price (SCM)
- IFCN Combined World Milk Price Indicator