

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## **Korea - Republic of**

### **Dairy and Products Annual**

#### **Dairy Product – ATO Seoul**

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**Report Highlights:**

There was a growing interest in the health aspect of dairy products and Korean consumers view functional additives as a convenient way to improve their daily diet. Fortified dairy products are expected to continue to grow in popularity among health conscious Koreans.

Korea's per capita consumption of dairy products is expected to grow about 20 percent over the next decade reflecting the growing economy, Koreans' exposure to a western diet, a rise in fast food outlets, and a growing appetite for pizza and pasta. In 2009, Korea consumed 62.1 kilograms of dairy products per capita (raw milk equivalent), up 1.3 percent compared to 2008. New product launches by major dairy companies and aggressive marketing activities are expected to diversify and increase consumption of dairy products.

**Executive Summary:**

Consumers will be encouraged to purchase more expensive products through innovative new product development such as semi skimmed and fat-free fresh milk which are marketed with an emphasis lower fat content and fresh image. While volume sales for most product categories are expected to grow slowly over the next 3 years, in value terms, sales are expected to grow by 6 percent during the same period. This will be the result of increased value added by the dairy industry through premium positioning, product fortification or home delivery.

Cheese sales are expected to continue to record strong growth, partly due to the ongoing diversification of product assortments. With the continued popularity of the health and wellness trend and Western-style food and dining, the demand for cheese will increase in the short- to medium-term. Ratification of the Korea-U.S. Free Trade Agreement will secure a larger share of the market for U.S. suppliers. In 2009, Korea imported 44,800 MT of unprocessed cheese and 4,300 MT of processed cheese, totaling 49,000MT. New Zealand was the largest exporter, accounting for 16,700 MT followed by the United States.

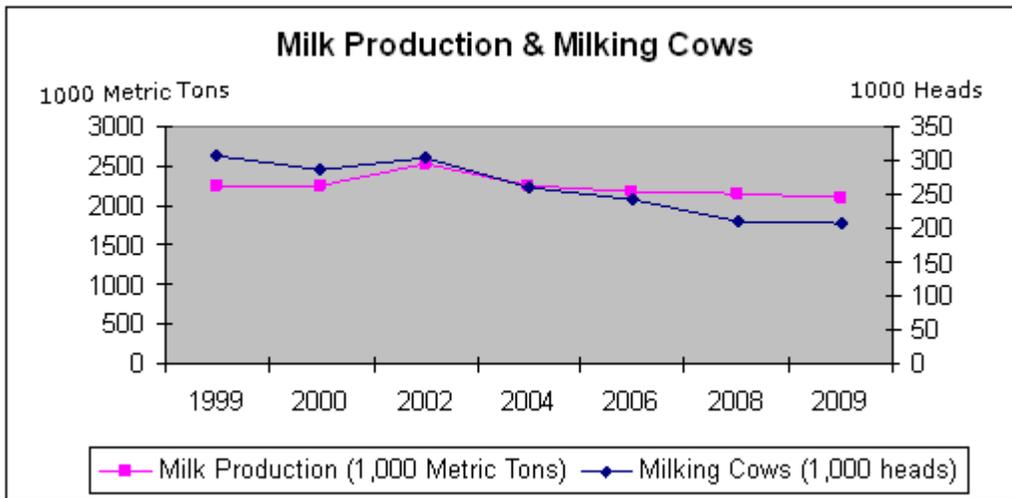
**Data included in this report is not official USDA data. Official USDA data is available at:**  
<http://www.fas.usda.gov/psd>

**Commodities:**

Dairy, Milk, Fluid

**Production:**

In 2009, Korean raw milk production was 2.11 million metric tons (MMT), down 1.4 percent compared to a previous year. Consolidation of dairy herds is expected to continue to improve milk yields as the table below shows. While the implementation of a two-tier pricing system for Korea’s major dairy companies is expected to dampen “overproduction”, overall price structures in the dairy industry still appear likely to encourage production increases in coming years. In conjunction with the continuing decline in dairy cattle numbers, raw milk production is expected to decrease slightly in near future. In 2009, 70 percent of total raw milk production is marketed for fluid use. The remaining 30 percent is marketed for processing.



**Consumption:**

Sales of all drinking milk products were valued at nearly \$3.2 billion in 2009, up 4 percent compared to 2008. This was due to rising grain prices, which in turn increase the cost of dairy feed and thus increase the cost of milk production. This boosted constant value unit price in 2009, driving current value growth but

notably hindering volume growth. In addition, sales growth was supported by the growing popularity of soy beverages, which continues to benefit from a healthy image.

In current value terms, fresh milk grew the strongest in 2009 over the previous year, with sales rising by 5 percent. In volume terms, milk however decreased by 2 percent in both 2008 and 2009, with this largely due to its higher prices. Soy beverages reached the best performance in 2009 over the previous year, with sales rising by 2 percent. Soy beverages continued to benefit from the health and wellness trend, with many regarding these products as beneficial due to an absence of lactose, a high level of isoflavones and links between soy milk and cholesterol reduction.

Child-specific milk remained a niche market, with these products accounting for about 10 percent value share in milk, in 2009. The leading brand *Enfant* from Seoul Dairy Cooperative however continued to gain market share in 2008 over the previous year, due to its strong promotional campaign.

Chilled flavored milk drinks dominate and continued to gain share, increasing by 96 percent in 2009. These are regarded as fresher and higher in quality and nutrients than ambient variants. They thus proved more popular with health-conscious consumers.

There is a marked preference for fresh milk in Korea, with long-life/UHT milk generally being regarded as lower in quality and nutrients. There was little presence for micro-filtered milk, however, generally focusing on different ways of adding value, such as Namyang's *Einstein* fresh milk, which contains naturally high levels of brain cell element DHA. Companies are expected to introduce more health and wellness products with added health claims, using natural ingredients which contain various vegetable seeds and buds. These products are expected to drive the sales value growth.

Consumers will be encouraged to trade up through ongoing innovative new product development, which is set to focus on semi skimmed and fat-free fresh milk due to their lower fat content and fresh image. Consequently, semi skimmed and fat-free fresh milk is expected to see constant value growth in coming years, despite seeing only less than half a percentage point volume growth respectively.

**Sales of Drinking Milk Products by Subsector: Value 2004-2009**

Unit: \$ Million

	2004	2005	2006	2007	2008	2009
Milk	1,713	1,762	1,898	1,908	2,006	2,103
-Fresh/Pasteurized milk	1,682	1,730	1,866	1,877	1,975	2,072
-Long life/UHT milk	31	32	32	32	31	31
Flavored milk	801	830	782	767	792	808
Dairy only flavored milk drinks	739	766	720	699	725	740
Flavored milk drinks with fruit juice	62	64	62	63	66	69
Soy beverages	272	266	270	276	282	289
Powder Milk	13	14	14	14	14	14
Flavored powder milk drinks	18	18	18	19	19	20
Chocolate based flavored powder drinks	14	15	15	15	15	16
Non Chocolate based flavored powder drinks	4	4	4	4	4	4
Drinking milk products	2,817	2,890	2,983	2,984	3,113	3,235

Source: Official statistics, Euromonitor International estimates

Exchange Rate: One US\$ equivalents to 1,000 Korean Won in August 2008

### Trade:

Korea does not import or export raw milk.

See detailed current (base) tariffs and tariff reductions that will occur under implementation of the KORUS FTA are available at:

[http://www.ustr.gov/Trade\\_Agreements/Bilateral/Republic\\_of\\_Korea\\_FTA/Final\\_Text/Section\\_Index.html](http://www.ustr.gov/Trade_Agreements/Bilateral/Republic_of_Korea_FTA/Final_Text/Section_Index.html)

A sector report on the implications of the Korea-U.S. Free Trade Agreement is available at: <http://www.fas.usda.gov/info/factsheets/Korea/commodity-dairy.asp>

### Policy:

Dairy farmers' cooperatives established an Association of Self-Dependence Fund for Dairy (ASDFD) in early 2006. The purpose of the fund is to promote milk consumption via television, radio and other advertising media. The fund is generated through a mandatory check-off program. Under the check-off program, each producer pays 2 Korean Won per Liter. In 2009, the fund was collected approximately \$8.5 million from ASDFD, which included matched fund by the Korean government.

In 2009, raw milk supplied up to the quota limit receives a basic price of KW830 per liter which was increased by 7 percent at farmer's production cost of KW614 per liter which was increased by 5 percent over the previous year. Dairy industry associations including the Dairy Farmers Association, Korea Dairy Committee, Korea Dairy & Beef Farmers Association and others attempt to control milk production through a marketing quota system. Milk supplied above in quota, farmers receives full price such as KW830 per liter but only half prices for above the quota. The intent of the two-different pricing system is to reduce "overproduction". Consequently, we foresee incremental decrease in milk production in 2010 and 2011.

**Dairy Products Imports into Korea from Major importing Countries (2008-2009)**

	2008			2009		
	Volume(A) (MT)	Value (B) (\$1,000)	Unit Price(B/A) (\$)	Volume (A) (MT)	Value(B) (\$1,000)	Unit Price (B/A) (\$)
U.S.	23,064	89,102	3.86	18,297	44,546	2.43
New Zealands	31,094	165,709	5.33	30,481	97,873	3.21
Netherlands	39,688	107,718	2.71	32,539	71,880	2.21
Australia	21,559	94,409	4.38	28,547	79,463	2.78
France	12,080	51,106	4.23	8,950	37,722	4.21

Source: Food Distribution Year Book 2010

### Marketing:

Seoul Dairy Cooperative reached the strongest growth in value share in 2008 over the previous year. The company benefited from its continued focus on health and wellness, with the launch of Good Night Milk in fresh milk. This milk was positioned as aiding in a good night's sleep. The company also benefited from continued growth for its premium variant of Seoul milk, "Milk with the Freshness of Pasture," which it launched in 2006. Seoul Dairy Cooperative is a strong leader in drinking milk products and accounted for 35 percent value share in 2008. The company accounted for 46 percent value share in both fresh milk and long-life/UHT milk in 2008 and also led powder milk sales with 49 percent. It also ranked second in flavored milk drinks with 20 percent value share in the year. The company benefits from its wide range of premium products and from its strong distribution via supermarkets/hypermarkets.

Drinking fluid milk products offers an ideal vehicle for fortified/functional food, with the flavor of milk generally effectively masking any change in flavor. In addition, consumers already regard drinking milk products as healthy, with health and wellness variants thus tapping into an already healthy positioning. Seoul

Dairy Cooperative's "Enfant" for children, Namyang Dairy Products Co Ltd's "Einstein" for brain development and Dr Chung's Food Co Ltd's "Vegemil" fortified soy milk, all gained value share in drinking milk products in 2008 over the previous year.

Local dairy product companies dominate drinking milk products, with Seoul Dairy Coop, Maeil Dairy Industry Co Ltd and Namyang Dairy Products Co Ltd together accounting for 62 percent value share in 2008. These companies benefit from well- established links with distributors, particularly the leading supermarkets, and dairy producers. Seoul Dairy Cooperative for example works with 4,000 coop member farmers.

There was a growing focus on naturally healthy functional additive, particularly in flavored milk drinks. Maeil Dairy for example launched Maeil "Morning Buds & Seeds Milk" which contains a range of vegetable seeds and buds, known for their healthy properties. Dongwon Dairy Food Company meanwhile launched "Sowanamu New Chestnut Milk", a sugar-free flavored milk drink flavored with chestnut. Private label accounted for 3 percent value share in 2008.

### Production, Supply and Demand Data Statistics:

#### Production, Supply and Demand Data Statistics:

Dairy, Milk, Korea, Republic of	Market Year Begin: Jan 2009			Market Year Begin: Jan 2010			Market Year Begin: Jan 2011			
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	
Cows In Milk	203	0	208	201	0	208			207	(1000 HEAD)
Cows Milk Production	2,075	0	2,110	2,054	0	2,103			2,097	(1000 MT)
Other Milk Production	0	0	0	0	0	0			0	(1000 MT)
Total Production	2,075	0	2,110	2,054	0	2,103			2,097	(1000 MT)
Other Imports	0	0	0	0	0	0			0	(1000 MT)
Total Imports	0	0	0	0	0	0			0	(1000 MT)
Total Supply	2,075	0	2,110	2,054	0	2,103			2,097	(1000 MT)
Other Exports	0	0	0	0	0	0			0	(1000 MT)
Total Exports	0	0	0	0	0	0			0	(1000 MT)
Fluid Use Dom. Consum.	1,556	0	1,702	1,540	0	1,472			1,468	(1000 MT)
Factory Use Consum.	519	0	408	514	0	631			629	(1000 MT)
Feed Use Dom. Consum.	0	0	0	0	0	0			0	(1000 MT)
Total Dom. Consumption	2,075	0	2,110	2,054	0	2,103			2,097	(1000 MT)
Total Distribution	2,075	0	2,110	2,054	0	2,103			2,097	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0			0	(1000 MT)
CY. Exp. to U.S.	0	0	0	0	0	0			0	(1000 MT)
TS=TD			0			0			0	

## Commodities:

Dairy, Cheese

### Production:

In 2009, South Korea produced 23,200 MT of cheese, a decrease of 7 percent from 2008. Unprocessed cheese composed 7,700 MT of the total. Processed cheese accounted for the remaining 15,500 MT of total production. Decreasing the domestic production is estimated by the reduction of local raw milk production compare to a previous year. However, imports were increased by 3.5 percent to 49,000 Metric tons and consumption remained stable. Seoul Dairy Cooperative accounted for 51 percent, Sangha Co., (former Maeil Dairy) for 22 percent, Dongwon Dairy for 14 percent, and Namyang Dairy Company for 6 percent of retail cheese sales in 2008.

### Sales of Cheese by Subsector: Value 2004-2009

Unit: \$ Million

	2004	2005	2006	2007	2008	2009
Processed cheese	186	196	206	217	225	233
• Unspreadable Processed Cheese	186	196	206	217	225	233
Unprocessed cheese	3	4	4	4	4	4
• Soft cheese	3	4	4	4	4	4
Total cheese	190	200	210	221	230	238

Source: Official statistics, Euromonitor International estimates

Exchange Rate: One US\$ equivalents to 1,000 Korean Won

### Consumption:

Cheese consumption is expected to return to strong growth in the near future as the economy improves. This will encourage consumers to opt for cheese, which is considered to be non-essential and something of a luxury. There is also expected to be trading up within cheese, with consumers opting for value-added health and wellness variants. However, many consumers are attempting to cut back on consumption of fatty foods, such as cheese.

In 2009, value sales of cheese increased by 4 percent to reach about \$238 million while the volume sales stagnated. With a growing interest by Korean consumers in Western food and dining patterns, the demand for a wider variety of cheese has increased. The range of available products has been diversified considerably in the retail channel. To satisfy the growing demand, manufacturers have extended their assortments by introducing new cheese products, including imported varieties. In addition, the growing popularity of wine has contributed to the increasing demand for cheese among consumers. Higher prices and growing economic concerns dampened the steady growth in the 2008-2009. However, rising economic concerns of consumers shy away from novelties such as cheese and instead focus their spending on more established favorites and daily necessities.

Non-spreading processed cheese saw the best performance in 2009 over the previous year, growing current value sales by 4 percent and achieving marginal volume growth. Growth was boosted by the strong performance of health and wellness products, such as calcium-fortified products and notably De Vinchi cheese. This was launched by Namyang Dairy in 2008 and contains 50 percent less fat than ordinary cheese

and 5 percent chicory fiber. It therefore avoided the high fat content and unhealthy image that deters many consumers from eating cheese on a regular basis.

There is little interest in snacking on cheese, which is generally used as part of a dish, with cheese sticks this having little presence in the country. Non-spreading processed cheese is generally sold in slices and positioned as suitable for toasting or eating in sandwiches.

There was a slight decline in constant value unit price in 2009 over the previous year, with this due to strong price competition. The sluggish performance of cheese in the last two years deterred the industry from increasing cheese price in line with rising dairy costs. Consequently, dairy industry suffered eroded profit margins.

**Trade:**

In 2009, Korea imported 44,700 MT of unprocessed cheese and 4,300 MT of processed cheese, totaling 49,000MT, increased by 3.5 percent compare to a previous year. New Zealand was the largest exporter, accounting for 16,700 MT followed by U.S.A with 9,100 MT to Korea. Cheese sales are expected to continue to record strong growth, partly due to the ongoing diversification of product assortments. With the continued popularity of the health and wellness trend and Western-style food and dining, the demand for cheese will increase in the short- to medium-term. Post projects 2010 and 2011 cheese imports at 58,000 MT and 64,000 MT, respectively.

Increased processed and unprocessed cheese consumption in 2009 was driven largely by increased imports. Nearly 85 percent of unprocessed cheese consumption is composed of imported cheese. In contrast, only 22 percent of processed cheese is imported.

See detailed current (base) tariffs and tariff reductions that will occur under implementation of the KORUS FTA are available at:

[http://www.ustr.gov/Trade\\_Agreements/Bilateral/Republic\\_of\\_Korea\\_FTA/Final\\_Text/Section\\_Index.html](http://www.ustr.gov/Trade_Agreements/Bilateral/Republic_of_Korea_FTA/Final_Text/Section_Index.html)

A sector report on the implications of the Korea-U.S. Free Trade Agreement is available at: <http://www.fas.usda.gov/info/factsheets/Korea/commodity-dairy.asp>

**Average Price per Kilogram of Imported Cheese by Country**

Unit: \$/Kilogram

	U.S.	Australia	Netherlands	France
2009	4.12	3.52	3.73	10.50
2010	4.12	3.52	3.73	10.50

Source: Food Distribution Year Book 2010

**Marketing:**

Local dairy industry dominates in cheese with the leader being Seoul Dairy Coop. The only significant multinational present in cheese is Kraft, which accounted for just 5 percent value share in 2008. The share of foreign industry meanwhile declined further in 2008 over the previous year, with higher prices on imported products resulting in consumers shifting away from these products.

Seoul Dairy Coop is the largest entity in cheese, accounting for 51 percent value share in 2008. This is due to its dominance of non-spreadable processed cheese, where it accounted for 52 percent value share, with this product area in turn accounting for 98 percent of overall value sales in cheese. The company benefits from its strong distribution for dairy products in general, with this having been established over many years. The company also benefits from its supply links, with its strong links with 4,000 cooperative farmers enabling it to keep costs and unit price increases to a minimum.

Namyang Dairy Co. grew the strongest in value share in 2008 over the previous year, almost doubling its value share from 3 percent in 2007 to 6 percent in 2008. This was due to the company's launch of innovative brand De Vinch in non-spreadable processed cheese, with this launch supported by effective TV advertising. De Vinch was the main new launch, highly innovative, containing high levels of dietary fiber, with 5 percent chicory fiber. The product is also low in fat, containing 50 percent less fat than standard

cheese. The launch thus appealed to consumers' growing health-consciousness, avoiding the high-fat and unhealthy image often associated with cheese. It thus rose to account for 3 percent value share in its first year. The brand is also positioned as offering the taste and texture of premium vintage cheese.

### Production, Supply and Demand Data Statistics:

Production, Supply and Demand Data Statistics:

Dairy, Cheese Republic of Korea,	2009			2010			2011			
	Market Year Begin: Jan 2009			Market Year Begin: Jan 2010			Market Year Begin: Jan 2011			
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	
Beginning Stocks	1	1	1	1	1	1			1	(1000 MT)
Production	26	26	23	27	27	22			22	(1000 MT)
Other Imports	50	50	49	52	52	58			64	(1000 MT)
Total Imports	50	50	49	52	52	58			64	(1000 MT)
Total Supply	77	77	73	80	80	81			87	(1000 MT)
Other Exports	0	0	0	0	0	0			0	(1000 MT)
Total Exports	0	0	0	0	0	0			0	(1000 MT)
Human Dom. Consumption	76	76	72	79	79	80			86	(1000 MT)
Other Use, Losses	0	0	0	0	0	0			0	(1000 MT)
Total Dom. Consumption	76	76	72	79	79	80			86	(1000 MT)
Total Use	76	76	72	79	79	80			86	(1000 MT)
Ending Stocks	1	1	1	1	1	1			1	(1000 MT)
Total Distribution	77	77	73	80	80	81			87	(1000 MT)
CY Imp. from U.S.	12	12	9	13	13	15			17	(1000 MT)
CY. Exp. to U.S.	0	0	0	0	0	0			0	(1000 MT)
TS=TD			0			0			0	

### Commodities:

Dairy, Milk, Nonfat Dry

### Production:

In 2009, local NFDM production amounted to 15,200 MT; a 24 percent decrease from the previous year. NFDM is produced from over-quota raw milk purchased at lower prices. In 2009, the domestic manufacturing cost of NFDM was about \$8.50 per kilogram. Current market retail prices of NFDM range from \$7.00 to \$7.50

per kilogram. Quota control of raw milk production and a decreasing number of dairy farms reduced the “over production” in 2009.

**Consumption:**

In 2009, NFDM consumption amounted to 27,800 MT. NFDM is used primarily for bakeries, infant formula and as an ingredient in other dairy products. Since NFDM production is largely a result of marketing quota policies, consumption is expected to continue to track closely with production.

**NFDM Production, Imports, Consumption by Year**

Unit: Metric Ton

	2004	2005	2006	2007	2008	2009
Production	24,770	23,677	18,318	22,158	20,000	15,200
Import	4,389	6,147	6,709	4,928	5,025	9,600
Export	1	69	114	140	270	470
Consumption	30,985	25,784	29,894	22,674	25,614	27,800

Source: Korea Dairy Industry Association 2010

**Trade:**

There is a tariff rate quota for NFDM. The quota quantity for 2008 was 1,034MT with an in-quota tariff rate of 20%. The out of quota tariff is 176%. From January to August 2010, imports of NFDM were 5,100MT; decreased by 9 percent compared to the same period of 2009. In 2009, Korean NFDM exports were increased by 75 percent from 270 MT to 470 MT compared to same period of 2008. All exports were to China in 2009 because the Chinese melamine outbreak demanded a quality, trusted infant formula.

**Korea’s Key Dairy Product Imports**

Unit: Metric Tons

Products (HS Code)	2009 Tariff	2007		2008		2009	
		U.S.	Total	U.S.	Total	U.S.	Total
Cheese (0406)	36%	7,900	49,470	11,322	47,385	9,100	49,000
NFDM (0402.10)	(20%- 176%) <sup>1</sup>	119	5,000	41	4,915	100	9,600
Whole Fat DM (0402.21)	(40%- 176%) <sup>2</sup>	0	1,130	0	1,259	0	1,200
Mixed Milk (0404.90 & 1901.90.2000)	36%	960	31,700	1,468	25,868	910	26043
Butter (0405.10)	(40%- 89%) <sup>3</sup>	6	4,100	56	1,894	80	2,100
Whey Powder (0404.10)	(20%- 49.5%) <sup>4</sup>	23,300	46,800	14,009	32,007	15,800	32,200
Ice Cream (2105)	8%	430	3,673	356	1,984	520	2,010

Source: 2009 Korea Customs & Trade Institute

**Notes:**

- 1: 20% tariff within the quota of 1,034 metric tons, 176% tariff out of the quota
- 2: 40% tariff within the quota of 573 metric tons, 176% tariff out of the quota
- 3: 40% tariff within the quota of 420 metric tons, 89% tariff out of the quota
- 4: 20% tariff within the quota of 54,233 metric tons, 49.5% tariff out of the quota

See detailed current (base) tariffs and tariff reductions that will occur under implementation of the KORUS FTA are available at:

[http://www.ustr.gov/Trade\\_Agreements/Bilateral/Republic\\_of\\_Korea\\_FTA/Final\\_Text/Section\\_Index.html](http://www.ustr.gov/Trade_Agreements/Bilateral/Republic_of_Korea_FTA/Final_Text/Section_Index.html)

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at: <http://www.fas.usda.gov/info/factsheets/Korea/commodity-dairy.asp>

## Marketing:

Local food processors import NFDM for the purpose of processing into infant formula and re-exporting to other countries, including China. The Korea Customs Service reimburses the high out-of-quota tariff of 176% to importers when they have re-exported processed dairy-based products made from the imported NFDM. Korean dairy manufacturing companies are looking forward to expanding the market opportunities for exporting to China.

### NFDM Imports by Origin in 2009

Unit: MT

	U.S.	Australia	New Zealand	E.U.	Total
Import Volume (MT)	96MT	7,452	832	1,258	9,638
Import Value (\$1,000)	\$191	\$17,802	\$1,929	\$3,265	\$23,187
Unit Price per Kilogram	\$1.99	\$2.39	\$2.32	\$2.60	\$2.41

Source: Korea Trade Information Service 2010

## Production, Supply and Demand Data Statistics:

### Production, Supply and Demand Data Statistics:

Dairy, Milk, Nonfat Dry of Korea, Republic	2009			2010			2011			
	Market Year Begin: Jan 2009			Market Year Begin: Jan 2010			Market Year Begin: Jan 2011			
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	
Beginning Stocks	5	8	5	5		5			5	(1000 MT)
Production	17	22	15	15		14			13	(1000 MT)
Other Imports	8	5	10	9		8			9	(1000 MT)
Total Imports	8	5	10	9		8			9	(1000 MT)
Total Supply	30	35	30	29		27			27	(1000 MT)
Other Exports	0	0	0	0		0			0	(1000 MT)
Total Exports	0	0	0	0		0			0	(1000 MT)
Human Dom. Consumption	25	26	25	24		22			21	(1000 MT)
Other Use, Losses	0	0	0	0		0			0	(1000 MT)
Total Dom. Consumption	25	26	25	24		22			21	(1000 MT)

