

東南亞國家乳品產量及其貿易概況

Production and Trade of Dairy Products in Southeast Asia Countries

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簡報綱要 (Outline presentation)

- ◆ 東南亞國家乳品產量及其貿易概況 (Dairy products and it's trade in Southeast Asia)
- ◆ 台灣乳製品及其貿易概況 (Dairy products and it's trade in Taiwan)
- ◆ 未來乳製品研發趨勢 (Trend of research in dairy products in the future)

表 1. 2012年東南亞國家人口數及國民生產毛額 (GDP)

Table 1. The population and GDP of Southeast Asia countries (2012)

Country	Area (km ²)	Population (1000 person)	GDP (USD)
汶萊(Brunei)	5,765	434	\$38,801
柬埔寨(Cambodia)	181,035	15,254	\$934
東帝汶(East Timor)	14,874	1,119	\$1,066
印尼(Indonesia)	1,904,569	244,468	\$3,660
寮國(Laos)	236,800	6,376	\$1,454
馬來西亞(Malaysia)	329,847	29,038	\$10,579
緬甸 (Myanmar)	676,000	63,672	\$849
菲律賓(Philippines)	300,000	97,737	\$2,462
新加坡(Singapore)	724	5,366	\$49,936
泰國(Thailand)	513,120	64,460	\$6,572
越南(Vietnam)	331,210	90,388	\$1,523



Wikipedia, 2012

3

表 2. 東南亞國家的乳品生產及貿易量 (百萬噸), 1990~2010

Table 2. Production and trade of milk (million ton) in Southeast Asia, 1990~2010

國家(Countries)	生產量 (Production)			淨進口量 (Net - imports)		
	1990	2000	2010	1990	2000	2010
東亞及東南亞(East and Southeast Asia)	18.8	25.7	55.3	5.77	10.7	16.4
中國(China)	7.0	12.4	41.5	0.97	2.08	6.1
日本(Japan)	8.2	8.5	7.72	1.36	1.66	1.52
南韓(South Korea)	1.75	2.26	2.08	0.12	0.49	0.70
緬甸(Myanmar)	0.52	0.62	1.40	0.02	0.13	0.08
印尼(Indonesia)	0.60	0.79	1.24	0.18	0.84	1.90
泰國(Thailand)	0.13	0.52	0.85	0.63	1.04	0.80
越南(Vietnam)	0.06	0.10	0.34	0.03	0.56	1.17
馬來西亞(Malaysia)	0.04	0.04	0.07	0.69	1.16	1.20
菲律賓(Philippines)	0.02	0.01	0.01	1.13	1.66	1.34

Source: FAOSTAT, 2013

表 3. 每人乳品消費量 (kg),1981~2007

Table 3. Per capita (kg) milk consumption, milk (milk equivalents), 1981~2007

	1981	1990	2000	2007
全世界(World)	86	80	104	113
已開發(Developed)	222	180	235	248
開發中(Developing)	35	40	56	68
泰國(Thailand)	8	14	26	na
菲律賓(Philippines)	14	19	22	na
馬來西亞(Malaysia)	48	41	52	na
越南(Vietnam)	1	1	8	na

na: 無資料 (no data)

Source: FAOSTAT, 2013

5

表 4. 不同區域每人每年乳製品消費量 (kg), 1987~2007

Table 4. Per capita consumption (kg/yr) of dairy products by region, 1987~2007

	乳酪及乳水		乾酪		乳油	
	1987	2007	1987	2007	1987	2007
全世界(World)	1.5	1.3	2.8	2.86	0.85	0.55
已開發(Developed)	4.6	2.8	9.91	12.44	2.83	2.18
開發中(Developing)	0.6	1.0	0.54	0.64	0.00	0.04
東亞及東南亞 (East and Southeast Asia)	0.1	0.1	0.11	0.24	0.00	0.02

Source: FAOSTAT, 2011

6

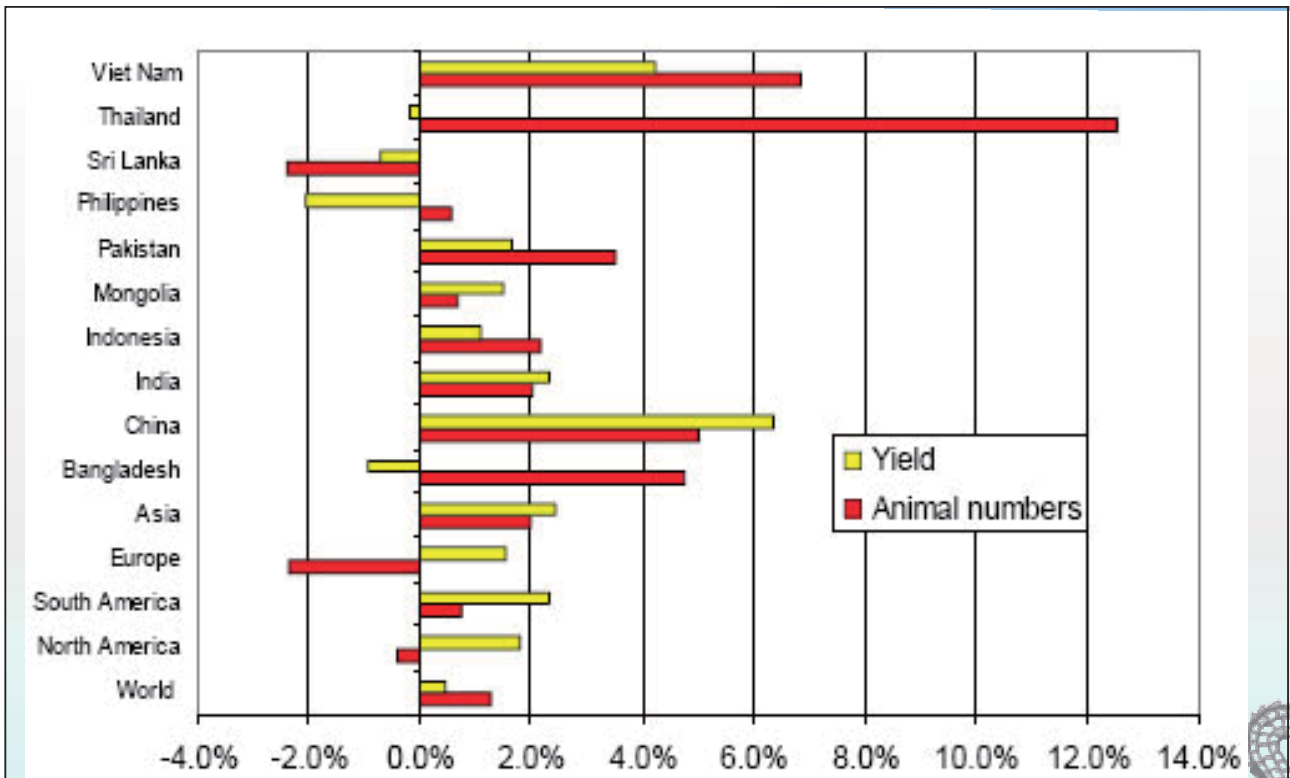


圖 1. 動物數量增減數及乳品產出比率 (10年間).

Fig. 1. Contribution of yield to milk output (over the past decade).

Source: FAO, 2012⁷

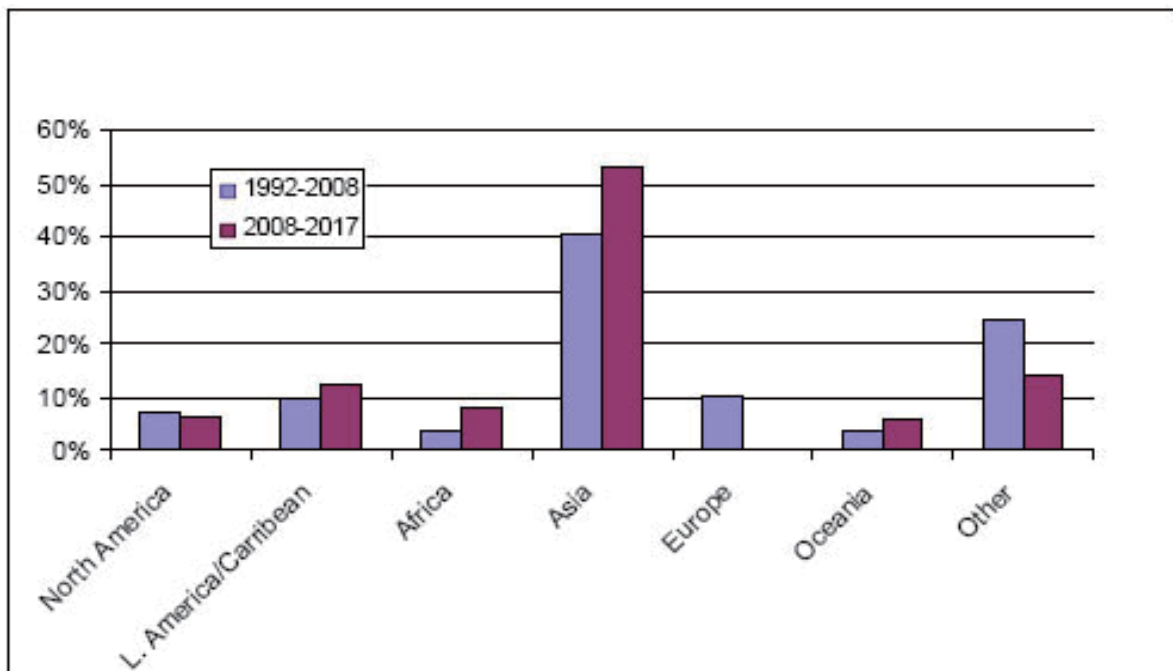


圖 2. 下個10年乳品產量會增加的區域?

Fig. 2. Where will dairy production gains be located over the next decade?

Source: FAO, 2012⁸

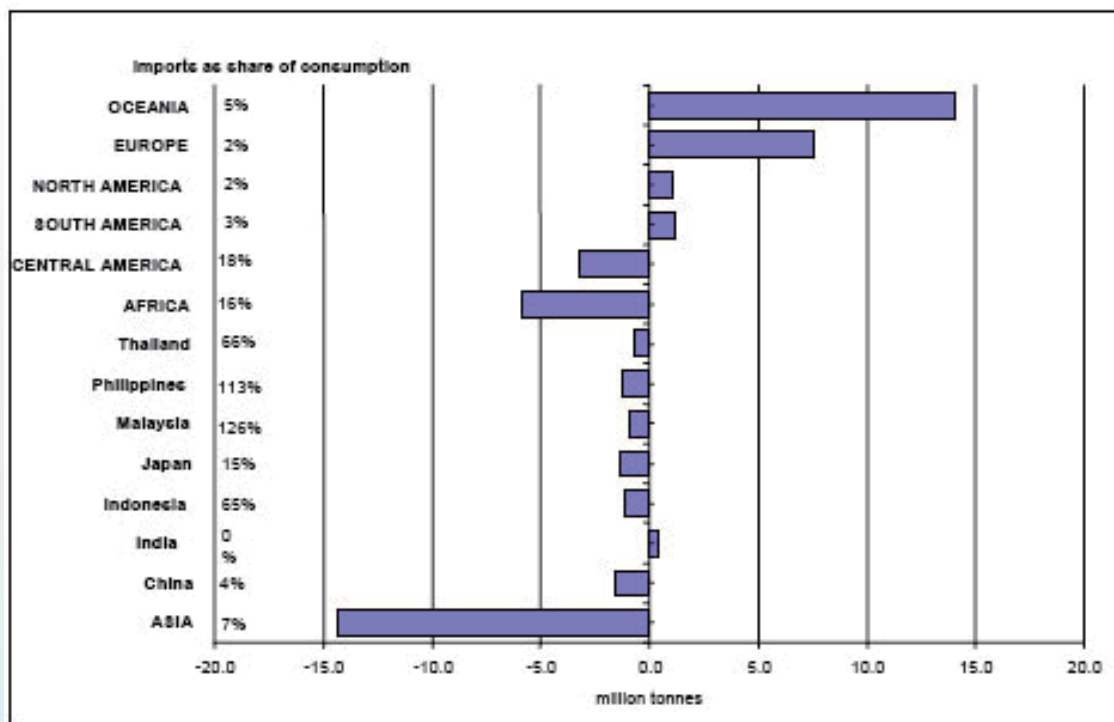


圖 3. 區域乳製品淨貿易增減概況, 2007.

Fig. 3. Net trade position in dairy products, 2007.

Source: FAO, 2012

9

表 5. 來自於綿羊、山羊、乳牛、駱駝及水牛乳品產量及百分比 (數量/1000噸)

Table 5. Volume and share of milk production from sheep, goats, cows, camels and buffalo, 2006~09 averages (amount/1000t)

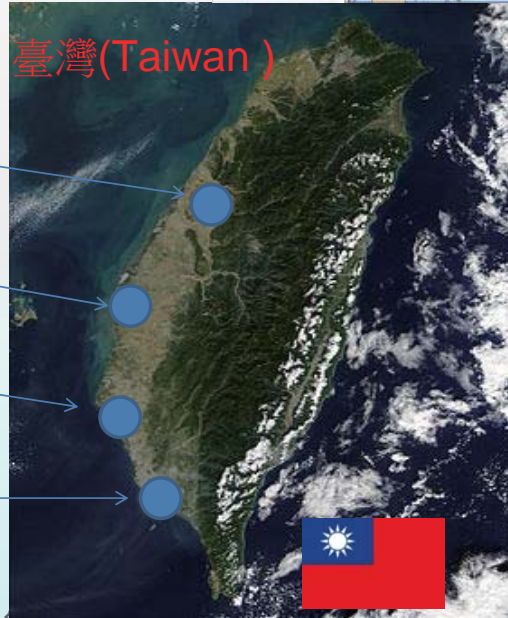
	Sheep	Goat	Cow	Camel	Buffalo	Total
東亞及東南亞 (East and Southeast Asia)	1,871 (3.9%)	614 (1.3%)	41,690 (87.6%)	17 (0%)	3,394 (7.1%)	47,586 (100%)
中國(China)	1,724 (4.2%)	278 (0.7%)	36,036 (87.6%)	13 (0%)	3,100 (7.5%)	41,150 (100%)
扣除中國之東亞及東南亞國家 (Rest of east and Southeast Asia)	147 (2.3%)	336 (5.2%)	5,654 (87.9%)	4 (0.1%)	294 (4.6%)	6,436 (100%)

Source: FAO, 2012

10

2012年臺灣乳牛主要分佈區域 (Major distribution of cow in Taiwan, 2012)

乳牛 (荷蘭牛) 129,445 頭及乳羊 55,348 頭
 Cow (Holsteins) 129,445 head and Milking goat 55,348 head



- 彰化縣 (Changhua county) 26,815 head
- 雲林縣 (Yunlin county) 14,698 head
- 臺南市 (Tainan city) 26,303 head
- 屏東縣 (Pingtung county) 26,112 head

圖4. 2012年臺灣農產品進口區域及金額
 Fig. 4. Import of agriculture products in 2012

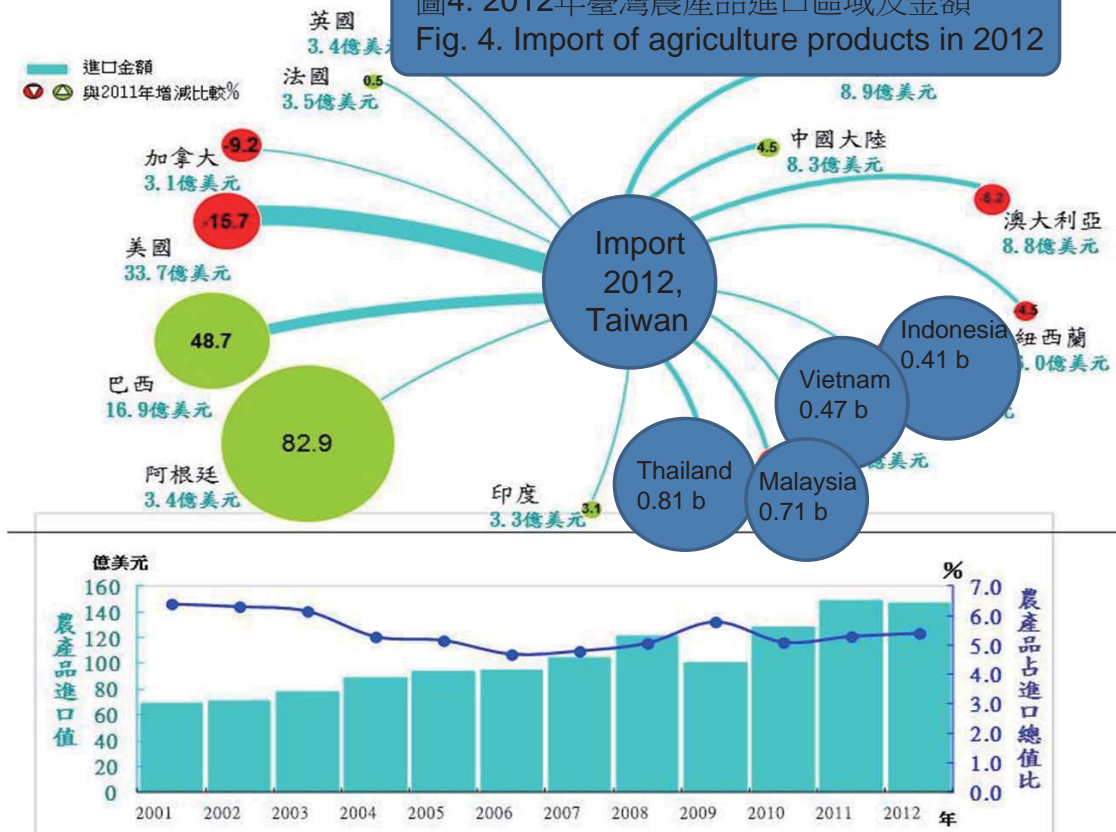
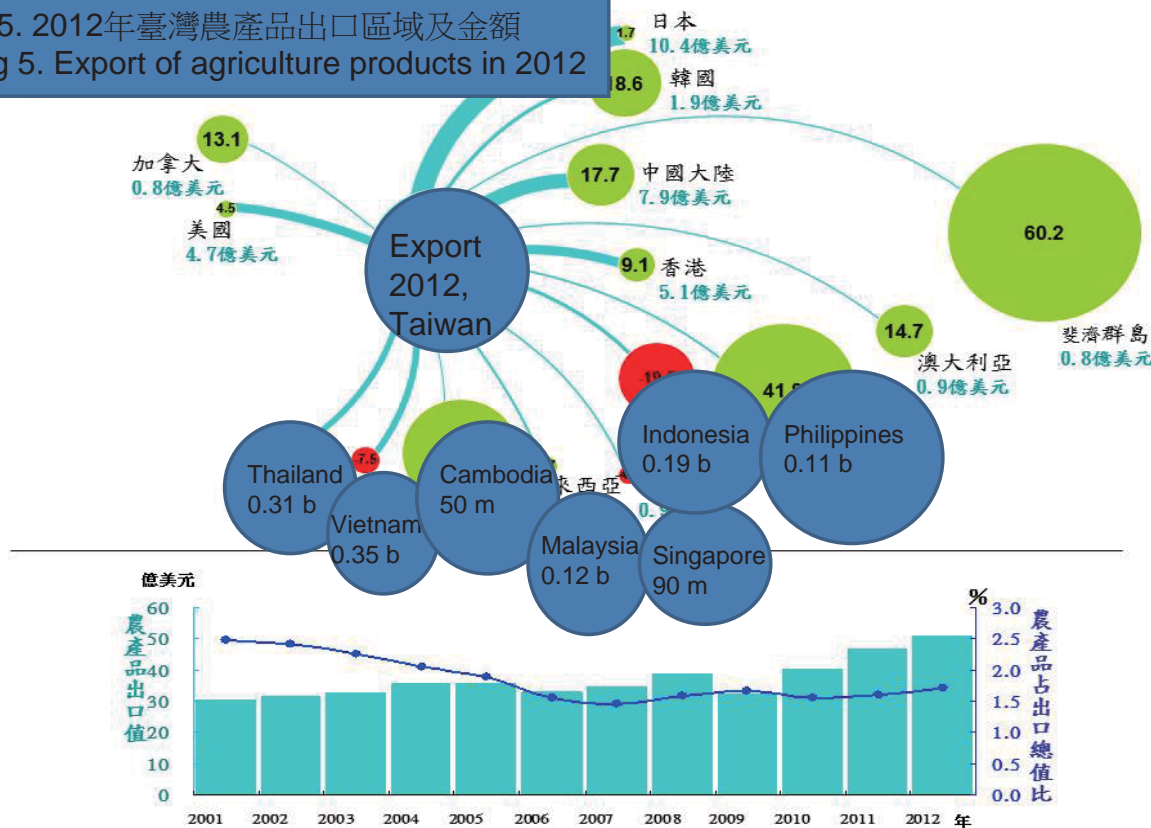


圖5. 2012年臺灣農產品出口區域及金額
Fig 5. Export of agriculture products in 2012



Source: COASTAT, 2013

13

表 6. 臺灣畜產品生產指數 (2003~2012)

Table 6. Food productions indices in Taiwan (2003~2012)

基準值: 2011 = 100 (Base: 2011 = 100)

公式: 數量的總合 (Formular: weighted aggregates of value)

0	2003	2011	2012
豬肉(Pork)	101.6	100	100.2
牛肉(Beef)	119.3	100	103.5
羊肉(Mutton)	172.4	100	113.4
禽肉(Poultry)	92.0	100	89.0
乳品(Milk)	88.7	100	99.2
指數		100	

Food supply and utilization, 2012

Photos source: wikipedia, 2013



14

表 7. 臺灣畜產品生產自給率 (%) (2003~2012)

Table 7. Self-sufficiency ratios (%) of livestock production in Taiwan (2002~2012)

	2003	2012
豬肉(Pork)	91.1	93.9
牛肉(Beef)	6.2	5.9
羊肉(Mutton)	9.3	9.2
禽肉(Poultry)	93.1	81.7
乳品(Milk)	29.3	33.0

Food supply and utilization, 2012

15

表 8. 臺灣畜產品生產佔外銷之比重 (%) (2003~ 2012)

Table 8. Export share of livestock production (%) in Taiwan (2003~ 2012)

	2003	2012
豬肉(Pork)	0.21	0.4
牛肉(Beef)	3.3	11.7
羊肉(Mutton)	0.0	0.0
禽肉(Poultry)	0.7	0.6
乳品(Milk)	1.9	10.9

Food supply and utilization, 2012

16

表 9. 臺灣畜產品進口佔生產量比重 (2003~2012)

Table 9. Import share of livestock products (%) in Taiwan (2003~2012)

	2003	2012
豬肉(Pork)	7.1	6.1
牛肉(Beef)	94.0	94.8
羊肉(Mutton)	90.7	90.8
禽肉(Poultry)	7.5	18.8
乳品(Milk)	68.5	66.6

Food supply and utilization, 2012

17

表 10. 臺灣乳製品進口及出口金額及佔乳製品供應量比重 (2002~2012)

Table 10. Import and export of dairy products in Taiwan (2002~2012)

	2002	百分比/ 乳品供應量 (Percentage/ dairy supply)	2012	百分比/ 乳品供應量 (Percentage/ dairy supply)
進口 (Import)	315,132 (1000 USD)	70.26 (%)	532,352 (1000 USD)	66.58 (%)
出口(Export)	6,213 (1000 USD)	2.02 (%)	32,030 (1000 USD)	10.86 (%)

Source: COASTAT, 2012

18

表 11. 臺灣乳製品進口品項及比重 (2009~2012)

Table 11. Import of dairy products in Taiwan (2009~2012)

	乳粉及乳塊 (Milk powder and milk curd)	乾酪(Cheese)	乳酪(Butter)
2009	238,340 (2.4%)	67,634 (0.7%)	34,905 (0.5%)
2012	287,802 (2.0%)	107,948 (0.7%)	73,939 (0.5%)

Source: COASTAT, 2012



乳粉(Milk powder)



乾酪(Cheese)



乳酪(Butter)

Photos source: wikipedia, 2013

19

未來乳製品研發趨勢

Trend of research in dairy products in the future

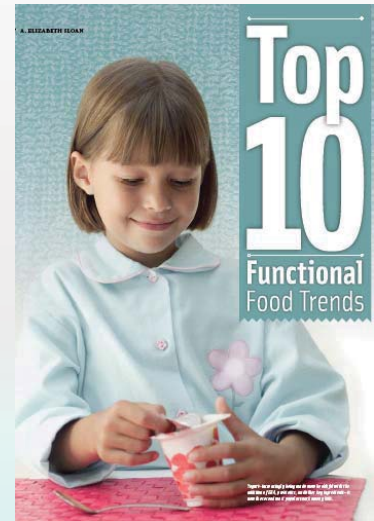
20

10大機能性食品發展趨勢

Top 10 functional food trends

Figure 2: Top health issues consumers are concerned about preventing From NMI(2005)

Heart disease (心臟疾病)	76%
Vision problems	75%
Lack of energy	73%
Obesity/overweight (肥胖/體態超重)	71%
Arthritis/joint disease	71%
High cholesterol (高膽固醇)	71%
High blood pressure (高血壓)	69%
Memory concentration problems	66%
Diabetes	59%
Osteoporosis	58%
Frequent cold and flu	58%
Blood sugar imbalance	56%
Acid reflux/heartburn	56%
Intestinal regularity	53%
Menopausal issues	33%

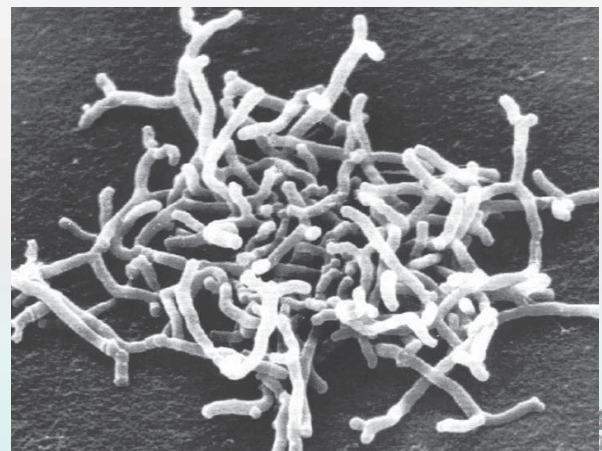


http://members.ift.org/IFT/Pubs/FoodTechnology/Archives/ft_0306.htm

益生菌(Probiotics)



L. acidophilus NCFM
Photo by Alan Servin



B. longum 536
Photo by Morinaga

腸道健康(Intestinal Health)



<http://shopping.pchome.com.tw/pstmilk/>



<http://www.weichuan.com.tw/product/index.htm>

23

抗高血壓(Hypertension)

AMYL-S



http://www.calpis.co.jp/corporate/press/nr0308_4.html

免疫功能 (Immune function)

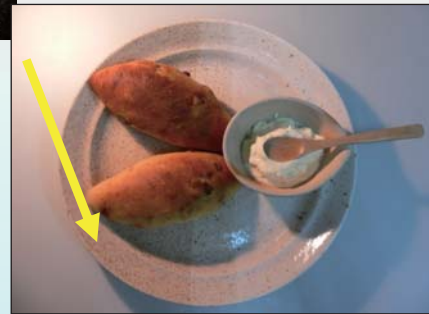
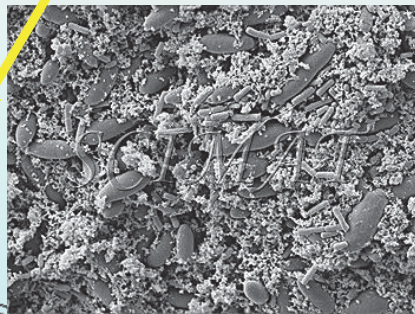


<http://shopping.pchome.com.tw/pstmilk/>

24

天然益生菌膠囊 (Natural probiotic capsule)

Kefir



Photos source: NTU

25

脫氧技術 (De-oxidation technology)



<http://www.kuangchuan.com/products/story.aspx?SubCategoryID=4>

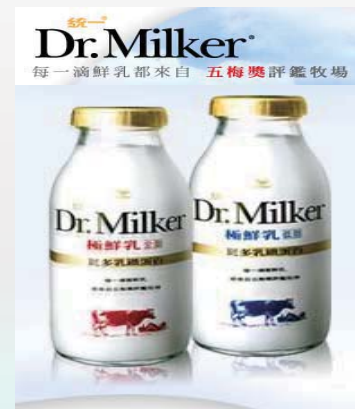
益生菌微膠囊化 (Application of probiotic capsules)



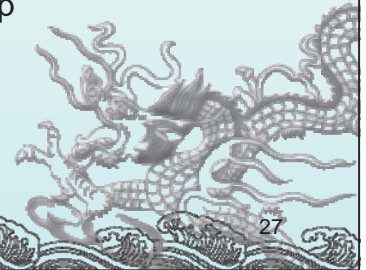
◆ <http://www.kuangchuan.com>

26

膜過濾技術 (Membrane separation)

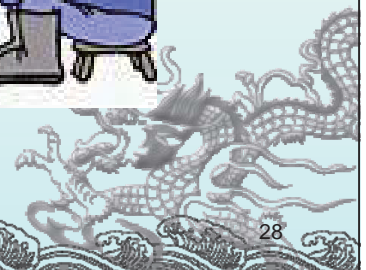


<http://www.uni-president.com.tw/05products/products01.asp>



27

Thank for your attention !



28