



connect to the world of dairy

TRADE AND ECONOMICS COMMITTEE

Wed. 12 June 2019

Brussels (Belgium)





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connect to the world of dairy

EDA SURVEY



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 12 JUNE 2019

Delegation: A U S T R I A

DEADLINE: Monday 15th May 2019 (COB)

If the data is not available for the period requested, please provide available information and **indicate the reference period in red.**

➤ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan- March 2019 / Jan- March 2018	What are your expectations for deliveries in Q2/19 compared to Q2/18?	What are your expectations for deliveries in Q3/19 compared to Q3/18?
- 2,4 %	(deliveries)	(deliveries)
Milk price evolution		What are your expectations for prices in Q2/19 compared to Q1/19?
Current milk price: 36,89 €/100kg (March)(milk with 4,0 % fat, 3,4 % protein, all qualities, ex farm without tax)	March 19/ March 18: + 2,9 %	(prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc...)
	Jan- Mar 2019 / Jan- Mar 2018	Expectations Q2/19 compared to Q2/18 (+ / - / stable)	Expectations Q3/19 compared to Q3/18 (+ / - / stable)	May 19/ May 18	Expectations Q2/19 compared to Q1/19 (+ / - / stable)	
SMP	%			+ 40 %		production not available in the moment
WMP	%			+5 %		production not available in the moment
CHEESE	+ 0,2 %			0 until + 10 %		main product
BUTTER	- 3,1 %			- 20 %		
WHEY	%			+ 15 %		production not available in the moment



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2019 – June 2019**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Milk delivery under the line of the previous year, but with increasing tendencies. The share of organic milk is around 19 % and therewith above the year 2018.
The turnover 2018 of the Austrian Dairy Industry amounted to 2,8 billion Euro (+ 3 %)
Ongoing discussion regarding animal welfare and the use of plastic.
Foreign Trade (EU-market and outside EU; CN-Codes 0401 – 0406) in 2018
Exports: 1.232 million Euro (+ 4,1 % to 2017), share of chees: 50 %.
Imports: 832 million Euro (+6,0 % to 2017)

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2019)**
(Trends, industrial changes, policy changes, **market expectations**)

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2019)**

Expected evolution in milk supply (+/-?):

Production trends for main products:

Consumption trends:

Exports (+/- and why?):

➔ **ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION**



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 12 JUNE 2019

Delegation: BE

DEADLINE: Monday 15th May 2019 (COB)

If the data is not available for the period requested, please provide available information and **indicate the reference period in red.**

➔ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan- March 2019 / Jan- March 2018	What are your expectations for deliveries in Q2/19 compared to Q2/18?	What are your expectations for deliveries in Q3/19 compared to Q3/18?
+1.4%	+ (deliveries)	+ (deliveries)
Milk price evolution		What are your expectations for prices in Q2/19 compared to Q1/19?
Current milk price: 33.59 €/100kg (March)	March 19/ March 18: +8%	- (prices)

➔ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc...)
	Jan- April 2019 / Jan- Dec 2018	Expectations Q2/19 compared to Q2/18 (+ / - / stable)	Expectations Q3/19 compared to Q3/18 (+ / - / stable)	Week 14-17 (April) 19/ 18	Expectations Q2/19 compared to Q1/19 (+ / - / stable)	
SMP	%			+30.8%	+	
WMP	%			+10.0%	+	
CHEESE (Cheddar)	%			+7.2%	+/-	
BUTTER	%			-21.1%	-	
WHEY	%			%		



- ➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2019 – June 2019**
(e.g. industrial developments, domestic policy changes, external factors, exports)

- ➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2019)**
(Trends, industrial changes, policy changes, **market expectations**)

- ➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2019)**

Expected evolution in milk supply (+/-?):

Production trends for main products:

Consumption trends:

Exports (+/- and why?):

- ➔ **ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION**



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 12 JUNE 2019

Delegation: CROATIA

DEADLINE: Monday 15th May 2019 (COB)

If the data is not available for the period requested, please provide available information and **indicate the reference period in red.**

➔ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-April 2019 / Jan-April 2018	What are your expectations for deliveries in Q2/19 compared to Q2/18?	What are your expectations for deliveries in Q3/19 compared to Q3/18?
-4,44%	moderate decrease (deliveries)	moderate decrease or no changes (deliveries)
Milk price evolution		What are your expectations for prices in Q2/19 compared to Q1/19?
Current milk price: 33,15 €/100kg (estimation for April)	April 19/ April 18: +2,54%	Price stability adjusted on seasonal milk quality (prices)

➔ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan- March 2019 Jan- March 2018	Expectations Q2/19 compared to Q2/18 (+ / - / stable)	Expectations Q3/19 compared to Q3/18 (+ / - / stable)	Week 18/2019/ Week 18/2018 (Wholesale prices)	Expectations Q2/19 compared to Q1/19 (+ / - / stable)	(Including stocks, consumption, etc...)
SMP	n/a			n/a		
WMP	n/a			n/a		
CHEESE	-0,37%			Edam (45%) 2-5 kg: 0,5% Gouda (45%) 2-5 kg: 5,52%		
BUTTER	-4,91%			Butter 250 g: -0,14% Butter I class block 25kg: 7,16%		
WHEY	n/a			%		



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2019 – June 2019**
(e.g. industrial developments, domestic policy changes, external factors, exports)

In April signed Protocol about veterinary and public health requirements which opened the possibility of dairy products export originating in Croatia to China.

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2019)**
(Trends, industrial changes, policy changes, **market expectations**)

Preparations for Croatian Presidency of Council of the European Union in the first half of Year 2020.
In other issues no significant changes in comparison to previous sent information.

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2019)**

Expected evolution in milk supply (+/-?):

Production trends for main products:

Consumption trends:

Exports (+/- and why?):

➔ **ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION**



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 12 JUNE 2019

Delegation: CZECH REPUBLIC

DEADLINE: Monday 15th May 2019 (COB)

If the data is not available for the period requested, please provide available information and **indicate the reference period in red.**

➔ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-April 2019 / Jan-April 2018	What are your expectations for deliveries in Q2/19 compared to Q2/18?	What are your expectations for deliveries in Q3/19 compared to Q3/18?
-0,29 %	stable (deliveries)	stable (deliveries)
Milk price evolution		What are your expectations for prices in Q2/19 compared to Q1/19?
Current milk price: 32,36 €/100kg (ø April)	April 19/ April 18: + 3,57 %	Moderate decrease due to the season (prices)

➔ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc...)
	Jan- April 2019 / Jan- April 2018	Expectations Q2/19 compared to Q2/18 (+ / - / stable)	Expectations Q3/19 compared to Q3/18 (+ / - / stable)	May 19/ May 18	Expectations Q2/19 compared to Q1/19 (+ / - / stable)	
SMP	-16,4 %	-	stable	+34 %	stable	stable
WMP	-11,3 %	+	stable	16,2 %	stable	stable
CHEESE	Natural -0,9% Processed +3,4%	stable	stable	Edam 30: -0,6% Edam 45: +10%	+	stable
BUTTER	10,8 %	stable	stable	250g: -6,1% Block: -12,5 %	stable	stable
WHEY	Powder 23,1 % Evaporated 19,4 %	stable	stable	26 %	stable	stable



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2019 – June 2019**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Development of other dairy products for period **January-April 2019 compared y/y**: improving development in all dairy categories rather negative situation in fresh dairy products; stable good situation remains only in cheese segment.

- Liquid milk: +1,6%, from that fresh milk -0,7%, UHT + 2,8%
- Cream: + 5,6 %
- Yoghurt: -3,1 %; other fermented milk products + 15,3 %
- Dairy spreads: +0,3 %
- Curd: + 1,8 %

Further moderate increase or stable situation in the production is expected.

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2019)**
(Trends, industrial changes, policy changes, **market expectations**)

Due to the seasonal spring/summer period further decrease of raw milk prices is expected, nevertheless the deliveries remain more/less stable.

The milk processing remains also stable or moderate improve can be expected.

The development of the next period will strongly depend on climate conditions – in the 1.Q was very hot and dry weather, since May starts cold and rain. Despite of this in the primary production we have still very high milk yield.

Consumption of dairy products in 2018 remained stable y/y: total 245,8 kg per capita in milk equivalent, for 2019 there is expected the growth again.

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2019)**

Expected evolution in milk supply (+/-?): stable situation

Production trends for main products: more or less stable situation or moderate increase in all products categories

Consumption trends: moderate increase is expected

Exports (+/- and why?): stable



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 12 JUNE 2019

Delegation: Denmark **DEADLINE: Monday 15th May 2019 (COB)**

If the data is not available for the period requested, please provide available information and **indicate the reference period in red.**

➔ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan- Mar 2019 / Jan- mar 2018	What are your expectations for deliveries in Q2/19 compared to Q2/18?	What are your expectations for deliveries in Q3/19 compared to Q3/18?
2,3%	1-3% (deliveries)	-1 - + 4% (deliveries)
Milk price evolution		What are your expectations for prices in Q2/19 compared to Q1/19?
Current milk price: 34,2 €/100kg (May)	May 19/ May 18: +3%	0% (prices)

➔ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc...)
	Jan- Mar 2019 / Jan- Mar 2018	Expectations Q2/19 compared to Q2/18 (+ / - / stable)	Expectations Q3/19 compared to Q3/18 (+ / - / stable)	May 19/ May 18	Expectations Q2/19 compared to Q1/19 (+ / - / stable)	
SMP	+6%			%		
WMP	0%			%		
CHEESE	3%%			%		
BUTTER	-10%			%		
WHEY	%			%		



- ➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2019 – June 2019**
(e.g. industrial developments, domestic policy changes, external factors, exports)

- ➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2019)**
(Trends, industrial changes, policy changes, **market expectations**)

- ➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2019)**

Expected evolution in milk supply (+/-?):

Production trends for main products:

Consumption trends:

Exports (+/- and why?):

- ➔ **ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION**

MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 12 JUNE 2019

Delegation: Finland

DEADLINE: Monday 15th May 2019 (COB)

If the data is not available for the period requested, please provide available information and **indicate the reference period in red.**

➔ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-April 2019 / Jan-April 2018	What are your expectations for deliveries in Q2/19 compared to Q2/18?	What are your expectations for deliveries in Q3/19 compared to Q3/18?
- 0,3 %	- 2 % (deliveries)	- 1,5 % (deliveries)
Milk price evolution		What are your expectations for prices in Q2/19 compared to Q1/19?
Current milk price: 35 €/100kg (May)	May 19/ May 18: - 4 %	(prices)

➔ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc...)
	Jan- April 2019 / Jan- Dec 2018	Expectations Q2/19 compared to Q2/18 (+ / - / stable)	Expectations Q3/19 compared to Q3/18 (+ / - / stable)	May 19/ May 18 retail	Expectations Q2/19 compared to Q1/19 (+ / - / stable)	
SMP	%			%		
WMP	%			%		
CHEESE	-0,2 %	stable	stable	+ 3 %		
BUTTER	-0,7 %	-	-	+ 5 %		
WHEY	%			%		



- ➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2019 – June 2019**
(e.g. industrial developments, domestic policy changes, external factors, exports)

- ➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2019)**
(Trends, industrial changes, policy changes, **market expectations**)

- ➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2019)**

Expected evolution in milk supply (+/-?): - 1 - - 1,5 %

Production trends for main products: No big changes..

Consumption trends: There has been quite strong decrease in liquid milk consumption (- 6 %) . It may continue

Exports (+/- and why?): No big changes, except what happens with US cheese tariffs?

- ➔ **ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION**

US cheese tariffs?



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 12 JUNE 2019

Delegation: FRANCE

DEADLINE: Monday 15th May 2019 (COB)

If the data is not available for the period requested, please provide available information and **indicate the reference period in red.**

➔ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan- March 2019 / Jan- March 2018	What are your expectations for deliveries in Q2/19 compared to Q2/18?	What are your expectations for deliveries in Q3/19 compared to Q3/18?
-2.2%	-1% (deliveries)	-1% (deliveries)
Milk price evolution		What are your expectations for prices in Q2/19 compared to Q1/19?
Current milk price: 34.8 €/100kg (March)	March 19/ March 18: +2.5%	stable (prices)

➔ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan- Mar 2019 / Jan- Mar 2018	Expectations Q2/19 compared to Q2/18 (+ / - / stable)	Expectations Q3/19 compared to Q3/18 (+ / - / stable)	May 19/ May 18	Expectations Q2/19 compared to Q1/19 (+ / - / stable)	(Including stocks, consumption, etc...)
SMP	-3.3%	-3%	stable	+38%	+	
WMP	-11.9%	-10%	stable	+7.5%	+	
CHEESE	-2.0%	stable	stable	+0.3%	stable	
BUTTER	-3.8%	-4%	stable	-27%	+	
WHEY	-1.8%	stable	stable	+21%	-	



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2019 – June 2019**
(e.g. industrial developments, domestic policy changes, external factors, exports)

The results of the new EGALIM law supposed to increase the prices paid by the retailers for food products in order to increase the farmgate milk prices are very mitigated and far from the government expectations.

A parliamentary inquiry commission on the retail sector is conducting public hearings during 4 months with all stakeholders and will write a report of the findings with new reglementary proposals regarding the relations between the retailers and their suppliers.

The French Observatory of price and margins recognized that the methodology applied during the last 10 years (8 annual reports to the parliament) is not relevant for the milk processing industry.

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2019)**
(Trends, industrial changes, policy changes, **market expectations**)

The milk deliveries decrease becomes a structural trend in France.

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2019)**

Expected evolution in milk supply (+/-?): +1% per year

Production trends for main products: decrease for SMP and butter

Consumption trends: decreases for liquid milk, fermented dairy products and soft cheese, moderate increase for semi-hard and hard cheeses, stability for butter and cream

Exports (+/- and why?): increase due to reduced milk production for most of the competing exporters in the global market

➔ **ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION**

MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 12 JUNE 2019

Delegation: Germany

DEADLINE: Monday 15th May 2019 (COB)

If the data is not available for the period requested, please provide available information and **indicate the reference period in red.**

➔ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan- March 2019 / Jan- March 2018	What are your expectations for deliveries in Q2/19 compared to Q2/18?	What are your expectations for deliveries in Q3/19 compared to Q3/18?
-0,0%	- (deliveries)	stable (deliveries)
Milk price evolution		What are your expectations for prices in Q2/19 compared to Q1/19?
Current milk price: 33,48 €/100kg (March)	May 19/ May 18: +2,3%	stable (prices)

➔ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc...)
	Jan- March 2019 Jan- March 2018	Expectations Q2/19 compared to Q2/18 (+ / - / stable)	Expectations Q3/19 compared to Q3/18 (+ / - / stable)	April 19/ April 18	Expectations Q2/19 compared to Q1/19 (+ / - / stable)	
SMP	-14,7%	-	-	+46%	+	
WMP	-9,5%	stable	+	+8,7%	+	
CHEESE	+1,2%	+	+	+6,5%	stable	
BUTTER	+2,7%	-	-	-21%	-	
WHEY	-14,3%	-	-	+21%	-	



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2019 – June 2019**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Milk deliveries higher than expected despite of drought in summer 2018. Favourable milk prices stimulated production. The market was in balance with good export opportunities despite for butter. No important changes in the industry. Tightening of fertilizer legislation announced.

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2019)**
(Trends, industrial changes, policy changes, **market expectations**)

Good export opportunities expected due to low milk output in 3rd countries. Uncertainty about Brexit and further trade policy between EU and USA.

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2019)**

Expected evolution in milk supply (+/-?): ? very low feed stocks from last season and so far a lack of water in deep ground in different regions of Germany.

Production trends for main products: Cheese production could increase further due to higher capacities. SMP could decrease further.

Consumption trends: consumption will follow the trend. Less liquid milk, but slightly more cheese.

Exports (+/- and why?): +, because of low supply and competitiveness of EU.

➔ **ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION**

MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 12 JUNE 2019

Delegation: Ireland

DEADLINE: Monday 15th May 2019 (COB)

If the data is not available for the period requested, please provide available information and indicate the reference period in red.

Ü MILK SUPPLY EVOLUTION

DELIVERIES		COMMENT	
Jan-April 2019 / Jan-April 2018		What are your expectations for deliveries in Q2/19 compared to Q2/18?	What are your expectations for deliveries in Q3/19 compared to Q3/18?
+ 9.8%%		+ 8% (deliveries)	- 2% (deliveries)
Milk price evolution		What are your expectations for prices in Q2/19 compared to Q1/19?	
Current milk price: 32 €/100kg	(May	May 19/ May 18: -3%	Stable (prices)

Ü NATIONAL DAIRY MARKET DEVELOPMENTS: January 2019 – June 2019

(e.g. industrial developments, domestic policy changes, external factors, exports)

2018 was an exceptionally difficult weather year for Irish Dairy farmers with an exceptionally long winter lasting into April, almost immediately then being followed by a period of drought until August.

That led to Milk supplies being back. Benign weather came in Q3 2018 and that excellent milk producing weather has held in Ireland until the present.

This means a big jump in Irish production for Q1 and will be flowed by another jump in Q2.

Irish beef is struggling and there has emerged over 2019 a split between sentiment between Irish beef and Dairy farmers that needs to be watched domestically.

Domestic policy has focused at looking for solutions of beef- which has not been helped by ongoing Brexit uncertainty.

Dairy exports from Ireland remain strong with focus on new non-EU Markets for growth.
2 Ministerial Trade missions to China & then Japan/Korea to drive trade.

Ü **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2019)** (Trends, industrial changes, policy changes, **market expectations**)

Obviously a solution to the Brexit saga that retains current dairy trading relationships would be fully welcomed in Ireland.

But the main issue on the dairy agenda at present is sustainability- and work at plant level reducing footprint, and helping suppliers with improving water and soil quality, Energy and Animal Welfare.

There has been a political and public sea change in attitudes towards dairy and climate change- so the industry is trying to be ahead of inevitable policy changes coming down the tracks.

Market expectations remain positive, a lot of work on innovation and looking for new markets and diversifying product in anticipation of Brexit and growth.

Ü **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2019)**

Expected evolution in milk supply (+/-?): +6% overall for 2019 projected.

Production trends for main products: Focus on Cheese- Butter and powders remain strong.

Consumption trends: stable in Ireland- slight move from liquid milk to general dairy product.

Exports (+/- and why?): + in exports with extra product on stream.

Ü **ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION**

Continued focus on Brexit- in particular raw milk flows across the Border on the island of Ireland that comply with DG SANTE regulations but are weather proof in all Brexit scenarios.

Commission should be using the lull in the political clock to work on this.



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 12 JUNE 2019

Delegation: **ITALY**

DEADLINE: Monday 15th May 2019 (COB)

If the data is not available for the period requested, please provide available information and **indicate the reference period in red.**

➔ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-Feb 2019 / Jan-Feb 2018	What are your expectations for deliveries in Q2/19 compared to Q2/18?	What are your expectations for deliveries in Q3/19 compared to Q3/18?
-2,8%	+ (deliveries)	+ (deliveries)
Milk price evolution		What are your expectations for prices in Q2/19 compared to Q1/19?
Current milk price: 39,32 €/100kg (April)	April 19/ April 18: +11,6%	(prices)

➔ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc...)
	Jan- April 2019 Jan- Dec 2018	Expectations Q2/19 compared to Q2/18 (+ / - / stable)	Expectations Q3/19 compared to Q3/18 (+ / - / stable)	May 19/ May 18	Expectations Q2/19 compared to Q1/19 (+ / - / stable)	
SMP	%			%		
WMP	%			%		
CHEESE	+4,1%	+	=	Parmigiano Reggiano (+14,1%) Grana Padano (+29,3%) Gorgonzola (+6,6%) Provolone Valpadana (+4,3%) Pecorino Romano (-18,7%) Mozzarella (+1,1%)		
BUTTER	+0,6%	=	=	-22,7%		
WHEY	%			+43,8%		



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2019 – June 2019**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Pecorino Romano sector suffered an intense crisis between the end of 2018 and the beginning of 2019. This crisis has been favoured by the combination of a surplus in production and a reduction in demand – mostly in the United States (-40% in 2018 compared to 2017) that is the first foreign market for Pecorino Romano cheese – that brought to a fall of sheep milk prices and to the consequent strong protests of the shepherds. After several institutional meetings with all parties involved, it was found a provisional solution on price, that has been allowed to a slight recovery of the market. Further developments are expected soon

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2019)**
(Trends, industrial changes, policy changes, **market expectations**)

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2019)**

Expected evolution in milk supply (+/-?):

Production trends for main products:

Cheese +
Milk +

Consumption trends: =

Exports (+/- and why?): +

Dairy export is constantly growing; Italian promotional programmes in strategic third Countries and the impact of FTAs will allow a secure further growth of Italian Dairy foreign sales

➔ **ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION**



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 12 JUNE 2019

Delegation: *luxemborg.* **DEADLINE: Monday 15th May 2019 (COB)**

If the data is not available for the period requested, please provide available information and **indicate the reference period in red.**

➤ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-April 2019 / Jan-April 2018	What are your expectations for deliveries in Q2/19 compared to Q2/18?	What are your expectations for deliveries in Q3/19 compared to Q3/18?
-3 %	-2 % (deliveries)	-2% (deliveries)
Milk price evolution		What are your expectations for prices in Q2/19 compared to Q1/19?
Current milk price: 34,07 €/100kg (April)	April 19/ April 18: +13 %	stable (prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc...)
	Jan- April 2019 / Jan- April 2018	Expectations Q2/19 compared to Q2/18 (+ / - / stable)	Expectations Q3/19 compared to Q3/18 (+ / - / stable)	May 19/ May 18	Expectations Q2/19 compared to Q1/19 (+ / - / stable)	
SMP	%			%		
WMP	%			%		
CHEESE	-50 %	-	-	%	+	
BUTTER	stable	stable	stable	%	stable	
WHEY	%			%		



- ➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2019 – June 2019**
(e.g. industrial developments, domestic policy changes, external factors, exports)

New stores, increased competition

- ➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2019)**
(Trends, industrial changes, policy changes, **market expectations**)

/

- ➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2019)**

Expected evolution in milk supply (+/-?): - 2%

Production trends for main products: *stable*

Consumption trends: *sugar reduced products*

Exports (+/- and why?): *stable, depending on markets opportunities*

- ➔ **ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION**

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MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 12 JUNE 2019

Delegation: NL

DEADLINE: Monday 15th May 2019 (COB)

If the data is not available for the period requested, please provide available information and **indicate the reference period in red.**

➔ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-April 2019 / Jan-April 2018	What are your expectations for deliveries in Q2/19 compared to Q2/18?	What are your expectations for deliveries in Q3/19 compared to Q3/18?
-2,8%	Slightly behind to stable (arrears seem to be leveling off a bit)	stable compared to previous year
Milk price evolution		What are your expectations for prices in Q2/19 compared to Q1/19?
Current milk price: 35.25 €/100kg (May)	May 19/ May 18: +3.7%	Given the fact that the supply situation in the global dairy market currently seems to be quite in balance with demand, price levels might pretty much tend to sustain at reasonable levels

➔ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc...)
	Jan- Mar 2019 / Jan- Feb 2018	Expectations Q2/19 compared to Q2/18 (+ / - / stable)	Expectations Q3/19 compared to Q3/18 (+ / - / stable)	Apr 19/ Apr 18	Expectations Q2/19 compared to Q1/19 (+ / - / stable)	
SMP	-11.3%	n..a	n..a	+45.3%	n..a	n..a
WMP	-12.5%	n..a	n..a	+17.0%	n..a	n..a
CHEESE	+3.8%	n..a	n..a	+3.2% (March)	n..a	n..a
BUTTER	-5.9%	n..a	n..a	-22.0%	n..a	n..a
WHEY	+6.4%	n..a	n..a	+19.0%	n..a	n..a



➤ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2019 – June 2019**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Processing

Processing developments during Q1 generally reflected the reduced volume of milk available. Cheese production however did increase again, indicating this product category clearly gets priority when it comes to optimizing the use of a reduced milk pool.

Trade

Dutch export development for the main dairy commodities at the start of 2019 (January 2019) was up for most of the main trading commodities (year on year): cheese (+5.7%), butter & butter oil (+5.5%), SMP (+79.0%), WMP (-3.9%) and condensed milk (+14.5%).

Milk prices

Farm gate in the Netherlands remained quite stable for the period January-April 2019, still moving around at a slightly above average levels. In April and early May market indicators triggered some slight erosion, though no downward crash at all is expected.

National Strategic Plan CAP (2021-2027)

In the course of 2019, the Ministry of Agriculture in the Netherlands will organize several national stakeholder meetings to get input on the priorities and measures of the National Strategic Plan CAP (NSP, 2021-2017). The elaboration of the NSP anticipates the implementation of the CAP reforms, though it is expected that CAP implementation will delay. In the elaboration of the NSP on implementing the CAP, the vision of the Ministry of Agriculture regarding the concept climate agreement and the so-called delta plan recovering biodiversity will play a significant role.

Climate related policies

Following the approval of the Dutch law on climate last December, which was a national follow-up to the 2015 Paris Agreement and included a national climate agreement, the Netherlands Environmental Assessment Agency (PBL) analyzed the design of this agreement, calculating the foreseen impact in comparison with its targets. In March 2019, PBL published the results of this study. Main conclusion and message was that the agreement was considered a positive first step but that most probably more was needed to be done to meet the set macro targets. This might have implications for all stakeholders, including the dairy sector. In anticipation and to take its responsibility, the Dutch dairy sector already had elaborated and presented to the Government in December a plan for further reducing greenhouse gas emissions. Though the Netherlands average CO₂ emission per kg milk of 1,15 CO₂ equivalents is already rather low, it will be a challenge for the Dutch dairy sector to meet the targets set in the plan. It is yet unknown what implications the latest PBL findings will have for the specific plan of the Dutch dairy sector and the targets to be met.

ZuivelNL (DairyNL): change in management ZuivelNL

As from 16th of March 2019, Ms. Janine Luten took office as the new Director of ZuivelNL, the Dutch dairy chain organisation (DairyNL). Ms Luten will focus on the general positioning of the organization, external relations and the multi-stakeholder project Sustainable Dairy Chain (DZK), in which processing industry and farmer organizations work closely together towards a more sustainable dairy sector.



➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2019)**
(Trends, industrial changes, policy changes, **market expectations**)

-Overall market expectations

Given the fact that in most leading dairy exporting regions supply development seems to be a bit tight, at least for the short term, with even New Zealand closing the season with less production growth than expected, due to dry conditions since the beginning of 2019, there is reason to cherish some optimism regarding the balance in the market throughout this summer. Even when EU will soon get into the peak season the signals so far give no indications for any extreme supply evolution to be expected there. Meanwhile, international demand development seems to be sufficient to balance the market for the short term. China has been very active early 2019 which may slow down its presence in the market in the short term, but the country is expected to accelerate imports later on the year, which may then be able to partly counter the new season's production start in New Zealand. Worries are caused by a negative impact on the feed sector caused by ongoing swine fever in Asia (e.g. China), possible trade conflicts and a looming weakening of global economic growth towards 2020. However, it is not expected these macroeconomic fundamentals will disturb dairy demand in key markets for the current year. In conclusion, tight supply in combination with sufficient demand are expected to result in a balanced market for the coming period, with a high probability of overall prices maintaining at reasonable levels.

-Milk production

Milk production, which early 2019 was still lacking behind the previous year level, is expected to come more into line with those previous year levels in the course of the year, due to the fact that by now, most of the herd restructuring has already taken place. This implies we are **unlikely** to see another fall in milk production volume in The Netherlands of the order of magnitude we had in 2018. The arrears observed over the first four months of 2019 already indicated a tendency of flattening, which suggests production might end up lining up again with volumes comparable to the previous year later on during 2019.

-Brexit

Trading conditions with UK after Brexit remain of great importance to the Dutch dairy sector. The initial deadline for UK leaving the EU (29th of March) has now long passed without having any clear routing, leave alone time schedule, of the process in sight. A lot of political fuss regarding the proposed deal between UK and EU – so far being rejected by British parliament – and the extension of deadlines does not add to any clarity. Early April, a serious postponement of maybe even a full year came in sight as a probable scenario. Though for the moment it is business as usual, the long term uncertainty affecting the business environment continues, which increasingly is problematic to companies on both sides. The Netherlands traditionally is an important trading partner of UK and the Dutch Government favours a "soft" Brexit. With all the uncertainty, the Government keeps urging the Dutch business sector to prepare for the worst (while still hoping for the best).



➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2019)**

Expected evolution in milk supply (+/-?): --/+

Production trends for main products: n.a.

Consumption trends: n.a.

Exports (+/- and why?): n.a.

➔ **ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION**

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MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 12 JUNE 2019

Delegation: Poland

DEADLINE: Monday 15th May 2019 (COB)

If the data is not available for the period requested, please provide available information and **indicate the reference period in red.**

➔ MILK SUPPLY EVOLUTION

DELIVERIES		COMMENT	
Jan- March 2019 / Jan-April 2018		What are your expectations for deliveries in Q2/19 compared to Q2/18?	What are your expectations for deliveries in Q3/19 compared to Q3/18?
+3,6%		increase (deliveries)	increase (deliveries)
Milk price evolution		What are your expectations for prices in Q2/19 compared to Q1/19?	
Current milk price: 32,05 €/100kg (April)		April 19/April 18: +2,7%	decrease (prices)

➔ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc...)
	Jan- Feb 2019 / Jan- Feb 2018	Expectations Q2/19 compared to Q2/18 (+ / - / stable)	Expectations Q3/19 compared to Q3/18 (+ / - / stable)	April 19/ April 18	Expectations Q2/19 compared to Q1/19 (+ / - / stable)	
SMP	+15,23%	+	+	+44%%	Stable	
WMP	+8,07%	+	+	+10,5%	-	
CHEESE	-1,73%	Stable	Stable	+10%	Stable	
BUTTER	-2,3%	-	Stable	-11,4%	Stable	
WHEY	ND	ND	ND	+28%	+	



- ➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2019 – June 2019**
(e.g. industrial developments, domestic policy changes, external factors, exports)

- ➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2019)**
(Trends, industrial changes, policy changes, **market expectations**)

Issue of “GMO free” labelling should be regulated in Polish law (for the time being “GMO free” labelling is regulated only by general rules and regulations on labelling)

- ➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2019)**

Expected evolution in milk supply (+/-?): increase

Production trends for main products: increase of production of milk powders, decrease in butter, cheese should be stable.

Consumption trends: positive

Exports (+/- and why?): export volumes will follow production

- ➔ **ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION**



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 12 JUNE 2019

Delegation: SPAIN

If the data is not available for the period requested, please provide available information and **indicate the reference period in red.**

➔ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan- March 2019 / Jan- March 2018	What are your expectations for deliveries in Q2/19 compared to Q2/18?	What are your expectations for deliveries in Q3/19 compared to Q3/18?
-0,5%	Slight decrease	Slight decrease
Milk price evolution		What are your expectations for prices in Q2/19 compared to Q1/19?
Current milk price: 0,326 €/L (March)	March 19 / March 18: +0,31 %	=

➔ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc...)
	Jan- April 2019 / Jan- Dec 2018	Expectations Q2/19 compared to Q2/18 (+ / - / stable)	Expectations Q3/19 compared to Q3/18 (+ / - / stable)	May 19/ May 18	Expectations Q2/19 compared to Q1/19 (+ / - / stable)	
SMP						
WMP						
CHEESE						
BUTTER						
WHEY						



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2019 – June 2019**
(e.g. industrial developments, domestic policy changes, external factors, exports)

The decree for introducing changes related to the Dairy Package (contracts, POs, etc.) was published in the Spanish Official Journal last 2nd of March 2019. Full text (Spanish): <https://www.boe.es/boe/dias/2019/03/02/pdfs/BOE-A-2019-2979.pdf>

Internal discussions about nutritional labelling systems (NutriScore). New regional regulations on food health and nutrients are expected.

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2019)**
(Trends, industrial changes, policy changes, **market expectations**)

General concern about the future of the CAP post 2020 (reduction of the budget). Overall Spanish economy situation is moderately positive. Political uncertainty: the new Spanish Government has not been announced yet, simultaneous European Parliament elections, regional elections and municipal elections (26th of May).

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2019)**

Expected evolution in milk supply (+/-?):

Production trends for main products:

Consumption trends:

Exports (+/- and why?):

➔ **ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION**



MARKET SITUATION

BY M. WOHLFARTH, ZMB

Market Information May 2019

The Dairy Market in General

Table 1

EU Dairy Markets Summary

in '000 t	2015	2016	2017 ¹⁾	2018 ²⁾	2019
	EU-28	EU-28	EU-28	EU-28	EU-28
Dairy Cows (December census, '000head)	23.595	23.525	23.299	23.100	23.000
Milk Deliveries to dairies	151.985	152.687	155.515	156.876	157.812
Milk for liquid consumption	31.389	30.866	30.885	30.200	30.000
Fermented Products and Desserts	9.842	9.963	10.000	10.030	10.050
Butter					
Production ³⁾	2.220	2.260	2.270	2.275	2.275
Consumption	2.056	2.091	2.117	2.079	2.100
Cheese					
Production ⁴⁾	10.161	10.336	10.398	10.500	10.620
Consumption ⁵⁾	9.383	9.606	9.607	9.696	9.790
Skim Milk Powder					
Production	1.600	1.700	1.670	1.640	1.570
Consumption	850	870	880	930	940
Whole Milk Powder production	795	828	830	790	780
Condensed Milk production	1.150	1.080	1.085	1.050	1.080
Skim Milk used for Casein	5.450	5.450	5.550	5.700	5.680
Population (million head)	508	510	512	513	514

1)Preliminary. 2) Estimated/Forecast. 3) Incl. an estimation for butteroil made from cream in butterequivalents.

4) Incl. Cheese made from other animals milk and processed cheese impact. 5) Including processed cheese.

Source: ZMB Berlin, Germany

Updated May 2019

Milk Supplies

Table 2

EU: Cow Milk Deliveries to Dairies

'000 tonnes	2013	2014	2015	2016	2017	2018x	Forecast 2019
EU 28	142.212	148.770	151.985	152.687	155.515	156.876	157.812
EU 27	141.708	148.247	151.471	152.198	155.039	156.423	157.362
EU 25	140.315	146.755	150.050	150.715	153.418	154.634	155.512
EU 15	121.956	127.273	130.560	130.896	133.099	134.004	134.380
EU 10	8.427	8.853	8.616	8.665	8.683	8.705	8.832
EU 2	1.393	1.491	1.421	1.483	1.621	1.789	1.850
Belgium	3.399	3.569	3.669	3.789	3.926	4.080	4.200
Bulgaria	511	495	505	530	593	680	700
Czech Rep.	2.740	2.830	2.508	2.532	2.552	2.601	2.650
Denmark	5.026	5.112	5.276	5.375	5.491	5.616	5.700
Germany	30.301	31.375	31.879	31.973	31.937	32.490	32.500
Estonia	706	730	720	715	727	748	780
Greece	607	615	612	619	614	620	620
Spain	6.305	6.679	6.793	6.886	7.022	7.121	7.200
France	23.974	25.293	25.375	24.452	24.629	24.568	24.400
Ireland	5.585	5.802	6.591	6.854	7.481	7.813	8.200
Italy	10.701	11.037	11.161	11.516	11.949	12.070	12.100
Cyprus	157	165	160	198	216	228	240
Latvia	736	804	808	814	814	781	800
Lithuania	1.339	1.436	1.438	1.413	1.403	1.367	1.400
Luxembourg	287	306	333	365	374	395	410
Hungary	1.364	1.470	1.523	1.552	1.525	1.551	1.570
Croatia	504	523	514	490	477	453	450
Malta	41	43	42	43	41	40	42
Netherlands	12.213	12.473	13.326	14.324	14.297	13.879	13.600
Austria	2.933	3.062	3.103	3.092	3.200	3.183	3.100
Poland	9.932	10.630	10.875	11.154	11.636	11.925	12.300
Portugal	1.777	1.856	1.928	1.843	1.851	1.864	1.850
Romania	882	997	916	953	1.028	1.109	1.150
Slovenia	517	532	553	575	579	571	550
Slovakia	827	844	865	823	826	818	800
Finland	2.287	2.357	2.394	2.399	2.366	2.354	2.350
Sweden	2.870	2.932	2.921	2.862	2.817	2.760	2.750
UK	13.692	14.804	15.199	14.547	15.145	15.192	15.400

Since 2015 new series for Germany, Czech Republic and Austria.

Source: ZMB, national statistics, Eurostat, European Commission.

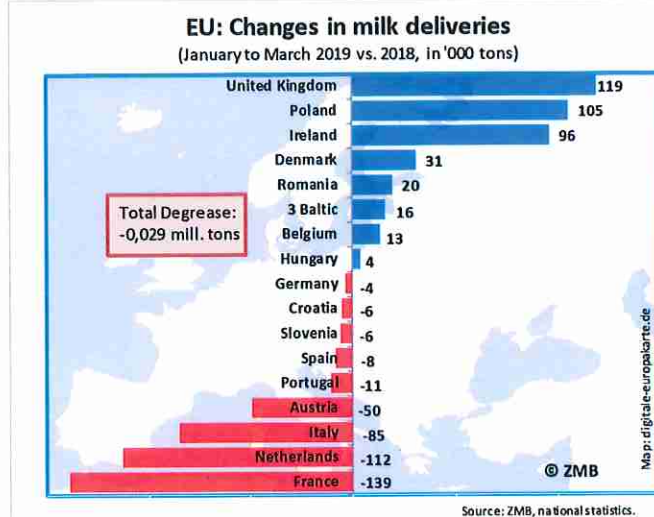
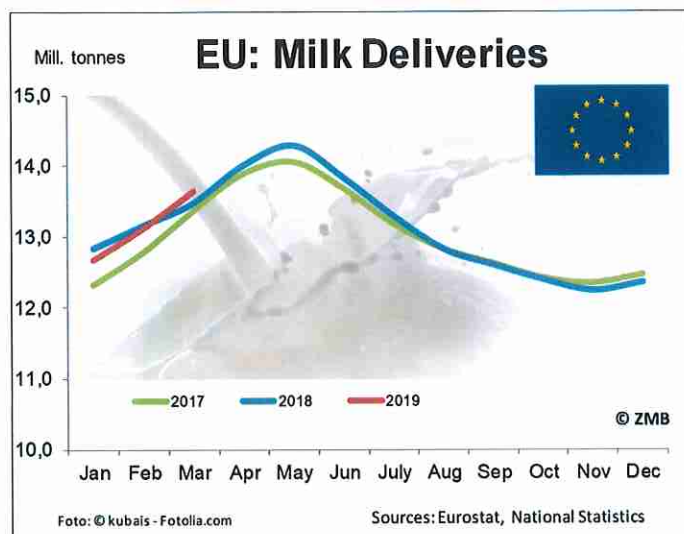


Table 3

EU Milk Deliveries	January - March			Mar.
000 t	2018	2019*	19:18 *	19:18 *
Belgium	1.018	1.031	+ 1,3%	+ 1,7%
Bulgaria	156	153	- 2,2%	+ 3,9%
Czech Rep.	648	646	- 0,3%	- 0,3%
Denmark	1.371	1.402	+ 2,2%	.
Germany	8.126	8.122	- 0,0%	+ 1,2%
Baltic States	652	668	+ 2,4%	+ 4,2%
Greece	156	155	- 0,8%	.
Spain	1.805	1.797	- 0,5%	.
France	6.456	6.317	- 2,2%	- 0,8%
Ireland	1.116	1.212	+ 8,6%	+11,1%
Italy	3.194	3.109	- 2,7%	- 1,8%
Croatia	119	113	- 4,6%	- 2,5%
Luxembourg	101	102	+ 1,1%	+ 2,3%
Hungary	399	402	+ 1,0%	+ 1,8%
Netherlands	3.553	3.441	- 3,2%	- 2,4%
Austria	854	805	- 5,8%	- 4,0%
Poland	2.912	3.017	+ 3,6%	+4,5%
Portugal	478	467	- 2,3%	- 1,9%
Romania	248	267	+ 7,9%	+10,2%
Slovenia	146	141	- 3,9%	- 2,3%
Slovakia	207	206	- 0,4%	+1,5%
Finland	593	591	- 0,3%	+0,4%
Sweden	704	700	- 0,5%	- 1,2%
U. Kingdom	3.738	3.857	+ 3,2%	+4,1%
EU -28	38.818	38.789	-0,1%	+1,2%

*) Provisional/ Estimate. ** Adjusted for leap day.

Sources: ZMB, national statistics.

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Table 4

Milk Output in different countries				
000 t	January-	2018	2019*	19:18 *
Switzerland	Apr.	1.213	1.182	-2,6%
Norway	Feb.	263	278	+5,6%
Bosnia/Herzeg.	Jan.	22	21	-2,8%
Serbia	Mar.	218	229	+5,1%
Turkey	Mar.	2.581	2.398	-7,1%
Russia ¹⁾	Mar.	6.401	6.507	+1,7%
Belarus ¹⁾	Mar.	1.686	1.694	+0,5%
Kasachstan ¹⁾	Mar.	886	912	+3,0%
Ukraine ^{1,2)}	Mar.	1.941	1.904	-1,9%
Canada	Feb.	1.552	1.558	+0,3%
USA ¹⁾	Mar.	24.675	24.722	+0,2%
Mexico	Mar.	2.892	2.953	+2,1%
Argentina ¹⁾	Mar.	2.509	2.301	-8,3%
Brazil	Mar.	6.194	6.365	+2,8%
Chile	Feb.	388	396	+1,9%
Uruguay	Mar.	434	396	-8,7%
Japan	Mar.	1.829	1.822	-0,4%
Australia ¹⁾	Mar.	2.135	1.896	-11,2%
New Zealand ¹⁾	Mar.	6.035	6.059	+0,4%

1) Milk production *) Provisional/ Estimate.

2) Since 2013 without Krim and Sewastopol.

Sources: ZMB, national statistics.

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Table 5

EU-Production of Dairy Products				
000 t	January - March			Mar.
	2018	2019*	19:18 *	19:18 *
Liquid milk	7.763	7.625	- 1,8%	- 2,7%
Cream	675	664	- 1,7%	- 5,6%
Fermented Products	2.245	2.238	- 0,3%	- 2,5%
Butter	559	565	+ 1,1%	+ 1,6%
Cheese	2.333	2.321	- 0,5%	- 1,5%
WMP etc.	191	172	- 10,2%	- 4,9%
SMP	418	406	- 2,9%	+ 0,6%
Condensed milk	222	247	+ 11,3%	+ 9,5%

*) Provisional.

Sources: ZMB, Eurostat, national statistics.

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Table 6

EU Balance Sheet of Milk for Liquid Consumption

'000 t	2015 EU 28	2016 EU 28	2017 EU 28	2018* EU 28	2019** EU28	2019** EU27
Production	31.389	30.866	30.885	30.200	30.000	23.200
Imports	1	1	10	10	10	10
Exports	604	737	751	727	750	700
Sales	30.786	30.131	30.144	29.483	29.260	22.510
Per capita (kg)	60,6	59,1	58,9	57,5	56,9	50,0

*)Provisional **) Estimation/Forecast.

Source: ZMB

Updated May 2019

Table 7

EU Butter Balance Sheet

'000 t	2015 EU 28	2016 EU 28	2017 EU 28	2018* EU 28	2019** EU28	2019** UK excl.
Initial stocks	130	130	100	90	145	120
Total production	2.220	2.260	2.270	2.275	2.275	2.110
- in dairies ¹⁾	2.200	2.240	2.250	2.255	2.255	2.095
- on farms	20	20	20	20	20	15
Imports	27	23	16	22	20	20
Exports	191	222	179	163	180	200
Final stocks	130	100	90	145	160	150
thereof public stocks	0	0	0	0	0	0
thereof PSA	55	25	0	0	0	0
Disappearance	2.056	2.091	2.117	2.079	2.100	1.900
Per capita (kg)	4,0	4,1	4,1	4,1	4,1	4,2

*)Provisional **) Forecast. 1)incl. An estimation for Butteroil made from cream.

Source: ZMB

Updated May 2019

Table 8

EU Cheese Balance Sheet

'000 t	2015 EU 28	2016 EU 28	2017 EU 28	2018* EU 28	2019** EU28	2019** UK excl.
Production	9.961	10.156	10.218	10.310	10.430	9.970
- from cows' milk in dairies	9.141	9.326	9.388	9.480	9.600	9.150
- on farms	100	100	100	100	100	90
- from other milk	720	730	730	730	730	730
Imports	61	71	59	59	60	80
Processing addition ¹⁾	200	180	180	190	190	180
Available	10.222	10.406	10.457	10.559	10.680	10.230
Exports	719	800	830	833	870	1.150
Stock Change	120	0	20	30	20	50
Consumption	9.383	9.606	9.607	9.696	9.790	9.030
- per capita (kg)	18,5	18,8	18,8	18,9	19,0	20,1

1) From processed cheese. *)Provisional **) Forecast.

Source: ZMB

Updated May 2019

Table 9

EU Balance Sheet of Whole Milk Powder						
'000 t	2015	2016	2017	2018*	2019**	2019**
	EU 28	EU 28	EU 28	EU 28	EU28	UK excl.
Production	795	828	830	790	780	760
Imports	3	6	2	2	3	3
Exports	400	380	393	334	350	340
Change in stocks	-25	10	0	15	-10	0
Sales	424	444	439	443	443	423

*)Provisional **) Forecast.

Source: ZMB

Updated May 2019

Table 10

EU SMP Balance Sheet						
'000 t	2015	2016	2017	2018*	2019**	2019**
	EU 28	EU 28	EU 28	EU 28	EU28	UK excl.
Opening stocks	143	212	472	485	365	335
Production	1.600	1.700	1.670	1.640	1.570	1.490
Imports	3	4	3	4	5	5
Available	1.747	1.916	2.144	2.129	1.940	1.830
Consumption	850	870	880	930	940	860
- other than feed	720	740	750	780	800	730
- in feed	130	130	130	150	140	130
Exports	684	574	779	834	880	880
Ending stocks	212	472	485	365	120	90
- in intervention	29	350	375	176	0	0
- in PSA	31	66	.	.	.	0

*)Provisional **) Forecast.

Source: ZMB

Updated May 2019

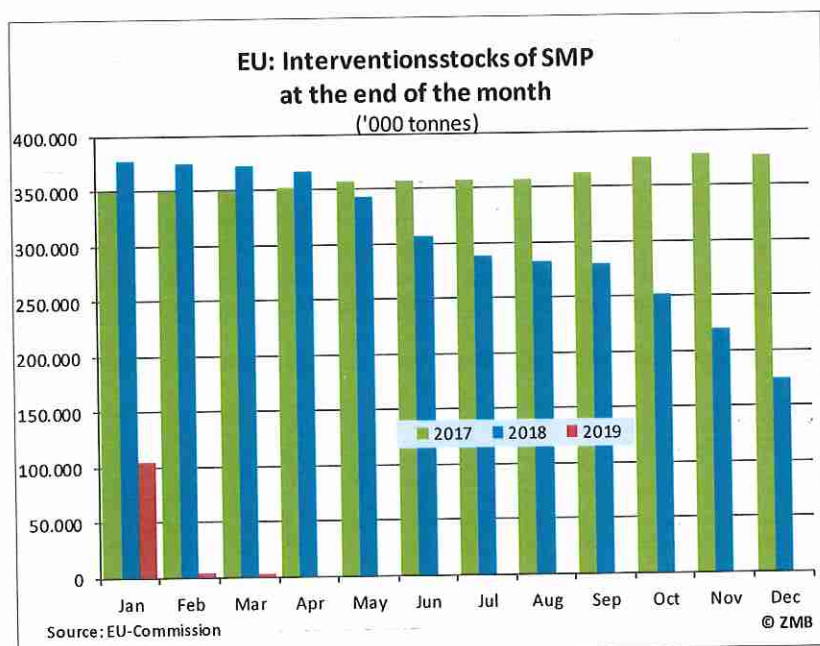


Table 11

EU Whey Powder Balance Sheet					
'000 t	2015*	2016*	2017*	2018*	2019**
	EU 28	EU 28	EU 28	EU 28	EU 28
Production	2.100	2.050	2.100	2.080	2.060
Imports	8	10	15	18	10
Exports	538	553	565	597	550
Stock change	-50	-70	0	-10	10
Consumption	1620	1577	1550	1510	1510

Partly desugared and demineralised whey powder included.

*) Estimated. **) Forecast.

Source: ZMB

Updated May 2019

Table 12

EU Casein Balance Sheet					
000 t	2015*	2016*	2017*	2018*	2019**
	EU 28	EU 28	EU 28	EU 28	EU 28
Production¹⁾	160	160	165	170	168
Import	23	24	22	18	15
Export	93	86	86	90	85
Stock change ²⁾	-3	3	4	2	0
Consumption	93	96	97	96	98

*) Estimated. **) Forecast. 1) Partly estimated.

2) Total stocks (manufacturers and users)

Source: ZMB

Updated May 2019

Table 13

EU Lactose Balance Sheet					
000 t	2015*	2016*	2017*	2018*	2019**
	EU 28	EU 28	EU 28	EU 28	EU 28
Production¹⁾	530	580	570	580	600
Import	5	8	8	8	8
Export	166	184	203	239	250
Stock change ²⁾	0	10	20	-10	0
Consumption ³⁾	368	393	356	359	358

*) Estimated. **) Forecast. 1) Partly estimated.

2) Total stocks (manufacturers and users), estimated. 3) Partly used as feed.

Source: ZMB

Updated May 2019

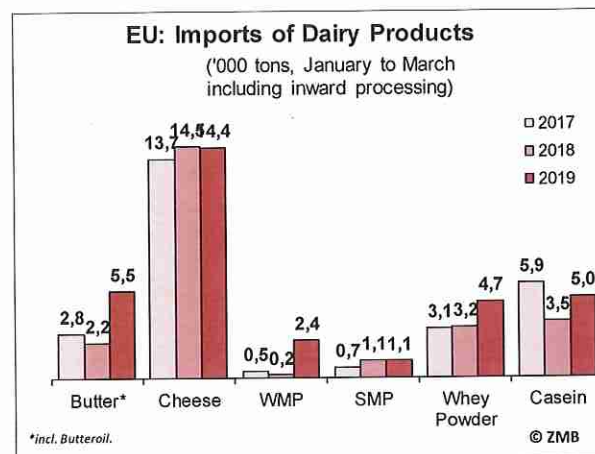
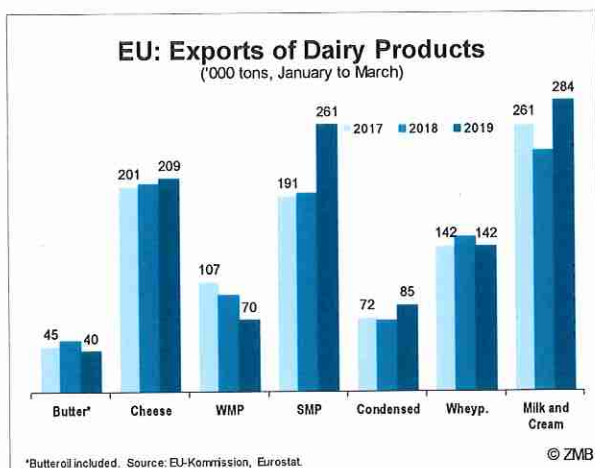


Table 14

EU-28 Exports of Butter <85%¹⁾

' 000 t	Months	2016	2017	2018	Months	2018	2019
Belgium	12	10,9	9,2	6,5	3	1,9	2,1
Denmark	12	17,3	16,3	22,1	3	6,4	5,5
Germany	12	15,3	12,8	10,0	3	3,1	1,6
Spain	12	0,8	0,7	0,6	3	0,2	0,2
France	12	31,5	32,9	31,5	3	8,3	8,1
Ireland	12	32,5	31,3	31,0	3	9,2	7,9
Lithuania	12	8,6	0,7	0,5	3	0,3	0,1
Netherlands	12	20,8	14,9	14,5	3	4,7	4,0
Portugal	12	3,3	2,5	1,6	3	0,4	0,1
Poland	12	4,8	3,3	1,8	3	0,5	0,6
Finland	12	6,5	4,1	3,5	3	0,8	1,0
U. K.	12	8,2	6,6	3,2	3	1,8	0,7
All other	12	1,7	1,9	1,2	3	0,4	0,5
EU-28	12	162,2	137,2	128,0	3	38,0	32,4

1) To 3rd countries outside EU 28.

Sources: ZMB, EU-Comm./EUROSTAT.

Table 15

EU-28 Exports of Butter > 85 % (AMF, etc.)¹⁾

' 000 t	Months	2016	2017	2018	Months	2018	2019
Belgium	12	5,5	4,5	4,7	3	1,7	1,7
Spain	12	0,3	0,2	0,8	3	0,4	0,3
France	12	8,2	7,6	6,8	3	3,0	2,2
Ireland	12	1,0	0,3	0,2	3	0,1	0,0
Netherlands	12	24,8	15,9	12,0	3	4,8	2,1
Sweden	12	0,0	0,0	0,0	3	0,0	0,0
United Kingdom	12	0,7	0,9	1,0	3	0,6	0,1
All other	12	1,9	2,0	2,2	3	0,8	0,2
EU-28	12	42,4	31,5	27,7	3	11,4	6,6

1) To 3rd countries outside EU 28.

Sources: ZMB, EU-Comm./EUROSTAT.

Table 16

EU-28 Imports of Butter and Butteroil¹⁾

' 000 t	Months	2016	2017	2018	Months	2018	2019
Belgium	12	5,9	5,1	6,3	3	0,7	1,2
Denmark	12	7,5	4,7	4,9	3	0,8	0,6
France	12	4,1	2,3	2,3	3	0,2	1,4
Netherlands	12	2,3	2,3	7,0	3	0,6	1,2
U. K.	12	2,0	0,8	0,3	3	0,0	0,6
All other	12	0,9	0,8	1,0	3	0,0	0,5
EU-28	12	22,7	15,9	21,9	3	2,2	5,5

1) From 3rd countries.

Sources: ZMB, EU-Comm./ EUROSTAT.

Table 17

Exports of Butter and Butteroil

tonnes	Mon.	2017	2018	2019	± %
EU - 28	I - III	45.410	51.660	40.391	- 21,8
New Zealand	I - III	117.131	114.378	147.326	+ 28,8
Australia	I - III	3.032	3.125	5.564	+ 78,0
USA	I - III	5.190	8.637	8.122	- 6,0
Switzerland	I - III	722	99	72	- 27,3
Belarus	I - III	16.003	17.530	16.843	- 3,9
Ukraine	I - II	1.254	5.933	3.751	- 36,8
Argentina	I - III	.	1.502	730	- 51,4
Uruguay	I - III	2.796	2.601	3.075	+ 18,2
India	I - II	794	1.416	4.739	+ 234,7
Total amount		192.790	206.880	230.613	+ 11,5

Sources: ZMB, EU-Comm., GTA, national statistics

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Table 18

EU 28: Exports of Cheese¹⁾

' 000 t	Months	2016	2017	2018	Months	2018	2019
Belgium	12	15,4	13,9	12,8	3	3,6	3,5
Bulgaria	12	7,8	6,9	7,0	3	2,0	1,4
Czech Rep.	12	5,6	5,8	4,7	3	1,4	1,3
Denmark	12	65,6	74,8	73,1	3	17,7	19,0
Greece	12	8,6	9,1	9,9	3	2,3	2,3
Spain	12	30,0	31,5	31,1	3	7,3	6,9
Germany	12	114,9	123,1	130,4	3	34,1	34,5
France	12	114,1	115,3	116,5	3	26,5	29,3
Ireland	12	49,2	49,5	49,2	3	6,9	9,2
Italy	12	100,0	100,0	100,3	3	23,1	25,6
Lithuania	12	14,3	16,4	11,3	3	3,3	2,2
Hungary	12	14,6	14,7	13,1	3	3,7	3,2
Netherlands	12	137,9	139,7	140,2	3	37,1	35,5
Austria	12	17,2	14,3	15,1	3	3,6	4,9
Poland	12	47,2	53,4	52,9	3	15,2	13,3
Finland	12	5,6	5,2	5,9	3	0,9	1,8
U.K.	12	34,9	32,2	35,7	3	9,8	9,8
All other	12	17,1	22,8	23,5	3	5,5	5,2
EU 28	12	800,0	828,6	832,7	3	204,0	209,0

1) To countries outside EU 28.

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 19

Exports of Cheese

tonnes	Mon.	2017	2018	2019	± %
EU - 28	I - III	201,5	204,0	209,0	+ 2,4
Switzerland	I - III	16,0	17,7	17,7	+ 0,1
New Zealand	I - III	88,7	79,9	89,8	+ 12,3
Australia	I - III	43,0	40,2	36,1	- 10,2
USA	I - III	80,2	88,9	97,6	+ 9,7
Belarus	I - III	47,3	46,3	57,7	+ 24,6
Argentina	I - III	6,5	11,0	10,7	- 2,7
Uruguay	I - III	8,1	7,4	5,0	- 32,2
Turkey	I - II	7,4	7,6	8,1	+ 6,6
Iran	I - III	15,6	12,2	17,6	+ 44,0
Total amount		514,3	507,7	549,2	+ 8,2

Sources: ZMB, EU-Comm., GTA, national statistics

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Table 20

EU-28 Exports of Condensed and Evaporated Milk¹⁾

' 000 t	Months	2016	2017	2018	Months	2018	2019
Belgium	12	4,5	5,4	5,8	3	1,3	1,5
Germany	12	57,3	63,2	51,0	3	10,5	21,5
Spain	12	4,6	8,3	18,4	3	5,9	6,6
France	12	1,6	1,7	2,0	3	0,4	0,5
Litauen	12	1,6	9,3	12,7	3	1,0	4,1
Netherlands	12	206,4	222,7	180,5	3	48,9	49,3
Poland	12	0,4	1,0	0,9	3	0,3	0,2
U.K.	12	2,4	1,4	1,0	3	0,1	0,5
<i>All other</i>	12	10,8	13,6	10,7	3	2,1	2,4
EU 28	12	282,7	319,8	276,2	3	69,1	84,6

1) To countries outside EU-28.

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 21

EU-28 Exports of Whole Milk Powder^{1) 2)}

' 000 t	Months	2016	2017	2018	Months	2018	2019
Belgium	12	26,0	38,3	28,8	3	8,5	4,8
Czech Rep.	12	4,5	3,5	4,2	3	1,0	0,8
Denmark	12	55,4	50,5	42,7	3	12,0	12,2
Germany	12	17,7	18,6	15,4	3	7,6	3,5
France	12	39,5	39,6	30,8	3	7,5	4,5
Ireland	12	25,3	38,3	26,8	3	4,9	2,6
Netherlands	12	146,6	149,2	126,1	3	36,1	28,4
Poland	12	6,1	9,3	3,4	3	1,1	0,6
Sweden	12	24,4	19,1	23,6	3	8,6	5,9
U.K.	12	23,3	18,8	20,6	3	5,4	3,5
<i>All other</i>	12	12,6	7,8	11,2	3	1,9	3,4
EU 28	12	381,4	393,0	333,6	3	94,6	70,2

1) To countries outside EU 28. 2) Incl. partly skimmed milk powder.

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 22

Exports of Whole Milk Powder

tonnes	Mon.	2017	2018	2019	± %
EU - 28	I - III	107,4	94,6	70,2	- 25,9
New Zealand	I - III	344,5	379,6	468,5	+ 23,4
Australia	I - III	14,7	18,1	10,5	- 42,1
USA	I - III	6,6	10,6	6,6	- 37,7
Belarus	I - III	7,1	8,8	5,9	- 33,1
Argentina	I - III	11,9	22,4	18,0	- 19,6
Uruguay	I - III	25,3	25,7	26,6	+ 3,4
Total amount		517,4	559,9	606,2	+ 8,3

Sources: ZMB, EU-Comm., GTA, national statistics

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Table 23

EU-28 Exports Skim Milk Powder¹⁾

' 000 t	Months	2016	2017	2018	Months	2018	2019
Belgium	12	85,0	143,2	162,2	3	40,9	47,7
Czech Rep.	12	10,5	11,1	13,0	3	3,2	2,9
Denmark	12	9,5	9,0	16,2	3	3,5	5,9
Germany	12	115,4	167,5	160,9	3	41,2	53,5
Spain	12	6,2	30,9	5,8	3	0,8	5,2
France	12	144,2	149,3	141,5	3	40,7	46,9
Ireland	12	31,3	47,7	63,7	3	13,6	13,5
Latvia	12	3,4	3,7	2,3	3	1,4	0,3
Lithuania	12	3,1	4,3	17,5	3	1,1	4,7
Netherlands	12	55,0	77,3	67,2	3	7,6	30,1
Poland	12	48,3	63,1	95,7	3	19,3	26,9
Finland	12	26,1	33,4	33,8	3	8,9	8,1
Sweden	12	15,9	20,9	25,6	3	5,0	6,9
U. K.	12	9,8	14,1	19,5	3	5,5	7,0
All other	12	10,6	4,3	9,2	3	1,2	2,3
EU 28	12	574,3	779,8	834,1	3	193,9	261,9

1) To countries outside EU-28.

Sources: ZMB, EU-Comm./EUROSTAT.

Table 24

Exports of Skim Milk Powder

tonnes	Mon.	2017	2018	2019	± %
EU - 28	I - III	191,6	193,9	261,9	+ 35,1
New Zealand	I - III	104,1	110,2	118,5	+ 7,5
Australia	I - III	38,4	41,0	45,0	+ 9,7
USA	I - III	148,1	182,3	164,7	- 9,6
Canada	I - III	9,3	18,1	7,2	- 60,2
Turkey	I - II	6,2	2,2	7,5	+ 235,9
Belarus	I - III	22,7	23,2	30,2	+ 30,0
Argentina	I - I	3,0	0,7	1,1	+ 58,0
Uruguay	I - III	4,2	1,6	4,2	+ 159,7
India	I - I	.	1,2	2,9	+ 133,3
Total amount		527,6	574,5	643,3	+ 12,0

Sources: ZMB, EU-Comm., GTA, national statistics

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Table 25

EU-28 Exports of Whey Powder¹⁾

1.000 t	Months	2016	2017	2018	Months	2018	2019
Belgium	12	10,8	10,5	9,1	3	2,7	2,7
Czech Rep.	12	19,4	21,1	24,7	3	4,7	6,6
Denmark	12	8,8	7,9	8,7	3	1,8	1,4
Germany	12	73,1	72,9	86,5	3	21,3	24,6
Estonia	12	0,7	1,1	2,5	3	0,5	1,0
Spain	12	19,6	16,7	20,1	3	5,1	5,4
France	12	179,2	178,9	172,4	3	47,2	42,0
Ireland	12	29,0	31,3	34,9	3	6,8	5,0
Latvia	12	5,2	5,7	6,4	3	1,0	1,5
Lithuania	12	9,2	12,7	14,9	3	4,1	2,9
Netherlands	12	60,8	64,2	67,7	3	18,7	15,1
Austria	12	6,4	3,9	6,0	3	1,7	1,2
Poland	12	100,8	99,0	97,8	3	25,0	20,0
Finland	12	18,1	19,5	17,3	3	4,3	3,1
<i>Other</i>	12	11,5	20,6	28,3	3	5,3	8,0
EU 28	12	552,6	566,0	597,3	3	150,2	140,5

1) To countries outside EU.

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 26

Exports of Whey Powder

tonnes	Mon.	2017	2018	2019	± %
EU - 28	I - III	141.762	150.217	140.512	- 6,5
USA (Whey products)	I - III	120.319	138.390	97.850	- 29,3
- <i>Whey Powder</i>	I - III	47.674	61.061	42.373	- 30,6
- <i>WPC</i>	I - III	36.513	44.094	25.121	- 43,0
- <i>Mod Whey</i>	I - III	36.133	33.235	30.357	- 8,7
Australia	I - III	7.904	7.781	10.813	+ 39,0
New Zealand	I - II	3.054	2.025	1.555	- 23,2
Argentina	I - III	8.062	12.644	9.124	- 27,8
Ukraine	I - II	4.604	3.762	4.750	+ 26,3
Norway	I - I	1.363	1.822	213	- 88,3
Canada	I - III	16.345	15.653	15.794	+ 0,9
Turkey	I - II	6.407	6.639	9.057	+ 36,4
Uruguay	I - III	3.999	4.228	3.571	- 15,5
Total amount		309.820	338.933	289.668	- 14,5

Sources: ZMB, EU-Comm., national statistics

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Table 27

Biggest Importers of Whey Powder

1.000 t	Months	2016	2017	2018	Monate	2018	2019
EU-28	12	9,6	15,1	17,7	3	3,2	4,7
China	12	495,0	527,0	554,8	3	136,2	114,7
Russia	12	123,1	93,3	.	2	11,5	6,4
Indonesia	12	116,4	120,5	125,0	2	17,9	19,5
Malaysia	12	77,9	77,2	.	2	12,7	14,4
Thailand	12	62,7	65,8	58,9	3	14,9	13,7
Mexico	12	45,4	57,3	62,3	2	10,4	.
Japan	12	51,5	57,0	54,5	3	17,5	19,0
Philippines	12	53,8	61,7	66,6	2	10,4	10,4
South Korea	12	35,4	33,7	34,6	2	4,9	5,1

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 28

EU-28 Exports of Casein and Caseinates to 3rd countries

000 t	Months	2016	2017	2018	Months	2018	2019
Denmark	12	0,0	0,0	0,0	3	0,0	0,0
France	12	14,4	17,6	21,2	3	5,2	6,1
Netherlands	12	22,5	23,2	1,6*	3	0,3*	0,4*
Germany	12	13,1	13,4	13,5	3	3,6	3,1
Ireland	12	26,7	23,1	27,5	3	5,9	5,2
Poland	12	6,8	6,5	6,0	3	1,3	2,1
All other	12	2,1	2,1	3,1	3	0,2	0,5
EU-28 ¹⁾	12	85,6	86,0	72,9	3	16,5	17,4

1) To countries outside EU-28.

*Statistical mistake likely. Not corresponding with import-figures.

Sources: ZMB, EU-Comm./ EUROSTAT.

Table 29

Exports of Casein and Caseinates

tonnes	Mon.	2017	2018	2019	± %
EU - 28	I - III	23.247	16.540	17.435	+ 5,4
New Zealand	I - III	21.546	24.110	23.062	- 4,3
USA	I - III	805	747	649	- 13,1
India	I - II	1.325	555	967	+ 74,2
Argentina	I - II	423	70	0	- 100,0
Belarus	I - III	625	429	342	- 20,3
Ukraine	I - II	360	454	376	- 17,2
South Africa	I - III	157	163	150	- 8,0
China	I - III	131	96	203	+ 111,5
Total amount		48.488	43.068	42.981	- 0,2

Sources: ZMB, EU-Comm., national statistics

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Table 30

Protein-Products-Production			
	January - March		
000 t	2018	2019*	19:18 *
Casein, France	14,1	13,8	- 2,5%
Casein, Ukraine	0,6	0,7	+ 4,8%
MPC, USA	17,7	18,7	+ 5,7%
WPC, USA	61,6	56,6	-8,2%
WPI, USA	13,0	13,0	-0,1%

*) Provisional.

Sources: ZMB, National Statistics.

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Table 31

Whey Powder Production			
	January - March		
000 t	2018	2019*	19:18 *
Germany	87	74	- 14,3%
France	130	127	- 1,8%
2 EU-Countries	216	202	-6,8%
USA Jan. - Mar.	123	106	- 13,6%
Australia Jan. - Nov.**	44	44	+ 1,1%

*) Provisional. **) 2017 and 2018

Sources: ZMB, Eurostat, national statistics.

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Table 32

Imports of Casein and Caseinates

' 000 t	Months	2016	2017	2018	Months	2018	2019
EU-28 (Incl IP.)	12	24,5	22,2	17,9	3	3,5	5,0
USA	12	80,6	74,7	66,0	3	17,1	15,5
- from							
total EU	12	36,6	33,6	33,1	3	8,0	7,2
- Ireland	12	14,3	9,6	12,4	3	2,6	3,4
- France	12	3,0	2,9	4,4	3	1,0	1,4
- Germany	12	2,6	2,7	1,8	3	0,7	0,4
- Netherlands	12	9,1	10,7	8,2	3	2,6	1,1
- Poland	12	3,7	3,9	2,4	3	0,3	0,7
- Other M. C.	12	3,9	3,9	3,8	3	0,8	0,2
India	12	2,9	1,5	2,3	3	0,1	1,9
New Zealand	12	33,7	34,2	24,7	3	7,0	5,6
Japan	12	13,6	13,3	13,1	3	3,4	3,7
China	12	21,1	18,7	24,5	3	6,8	5,6
Mexico	12	18,6	18,2	21,4	3	5,1	.
Canada	12	4,9	3,5	3,1	3	.	.
South Korea	12	6,6	7,0	6,9	3	1,8	1,9
Malaysia	12	4,4	4,5	.	3	.	.
Thailand	12	5,6	4,7	5,8	3	1,7	1,1
Indonesia	12	8,6	9,6	9,5	2	1,9	1,3

Sources: ZMB, EUROSTAT/ EU-Comm.; USDA, FAS; ALIC.

Table 33

EU-28 Exports of Lactose¹⁾

1.000 t	Months	2016	2017	2018	Months	2018	2019
Germany	12	77,2	93,3	97,5	3	21,0	27,1
Estonia	12	0,0	0,0	0,0	3	0,0	0,0
Ireland	12	0,4	0,1	0,2	3	0,0	0,4
France	12	16,4	16,8	17,2	3	3,6	7,1
Italy	12	10,4	10,2	11,7	3	2,2	3,6
Latvia	12	1,3	0,2	4,7	3	2,0	0,0
Lithuania	12	8,5	9,1	8,0	3	1,5	2,6
Austria	12	2,3	1,8	3,3	3	0,8	0,8
Netherlands	12	60,1	57,8	65,8	3	16,4	16,4
Other	12	7,8	13,3	30,7	3	5,3	3,9
EU-28	12	184,4	202,6	239,1	3	52,8	61,9

1) To countries outside EU.

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 34

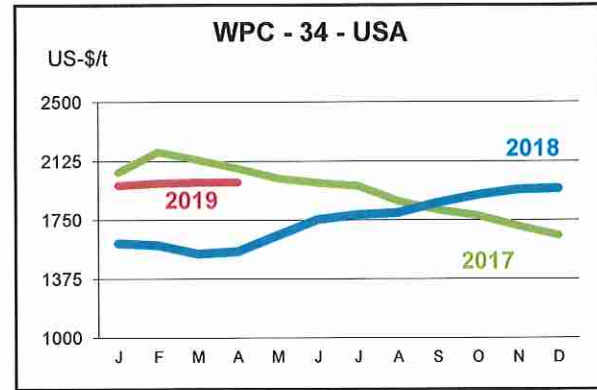
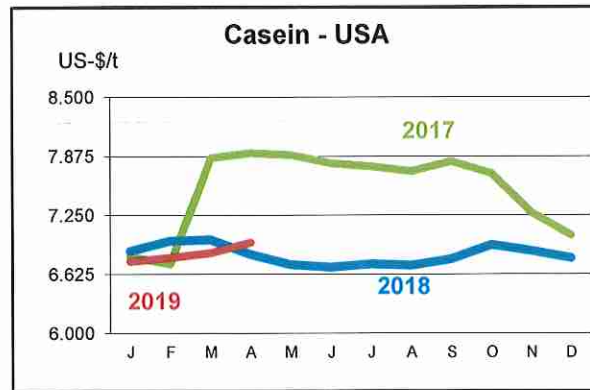
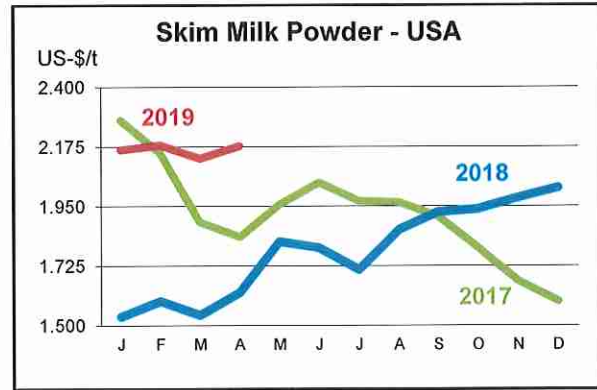
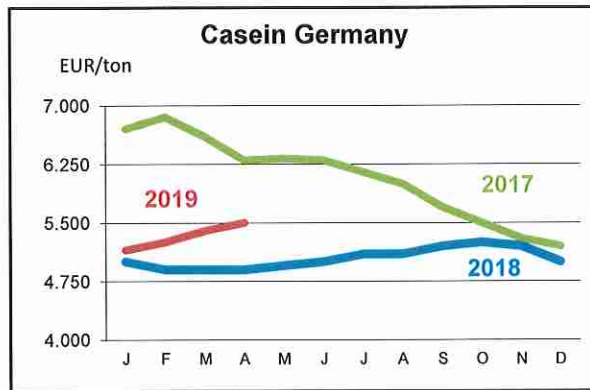
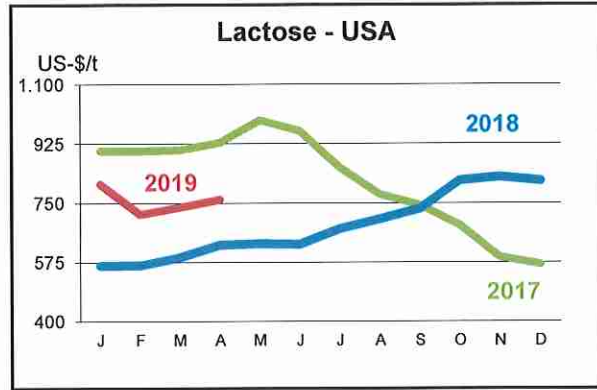
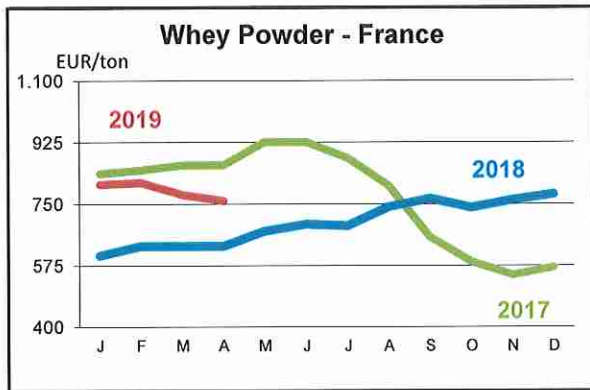
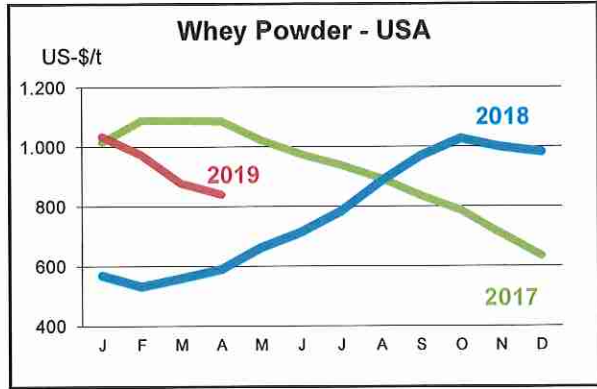
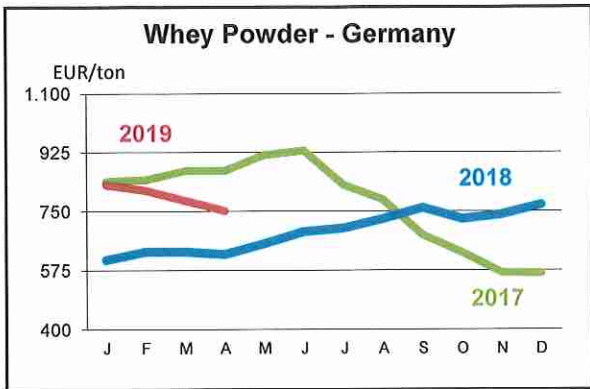
Exports of Lactose

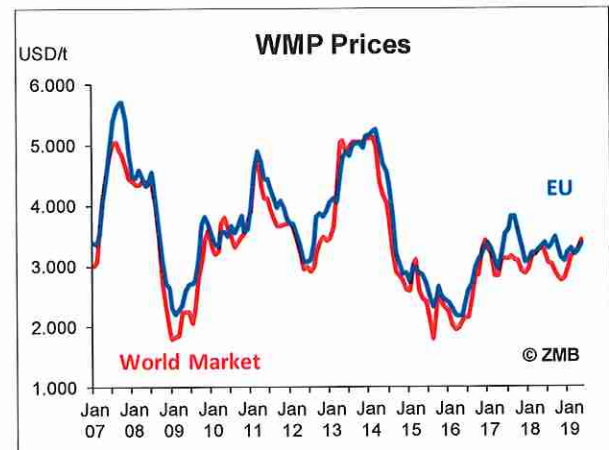
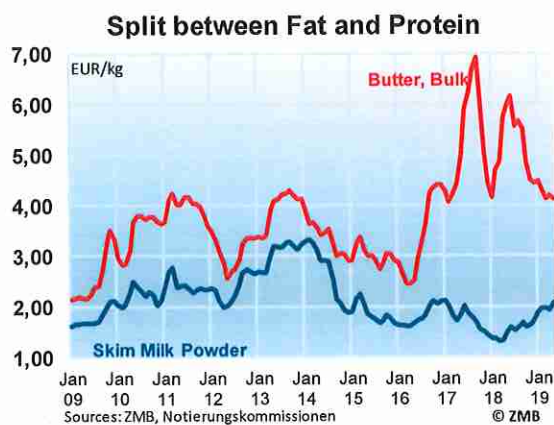
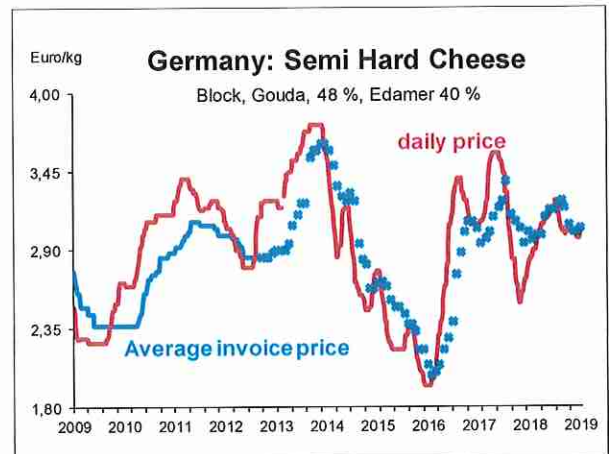
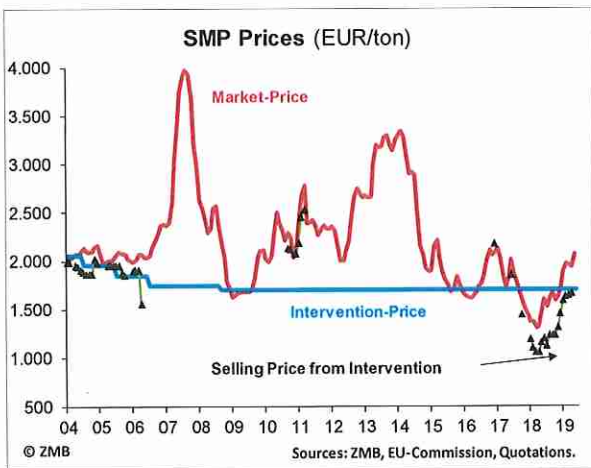
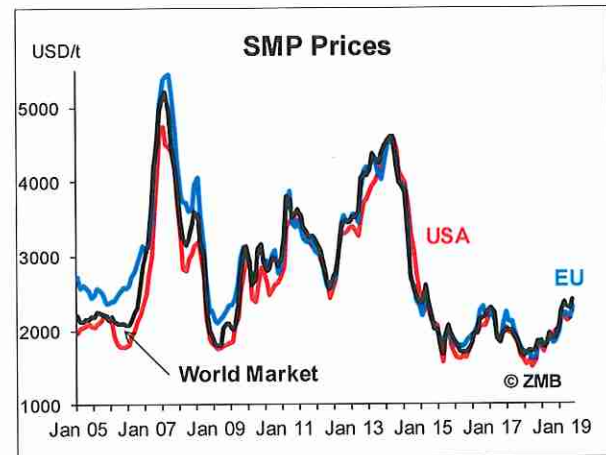
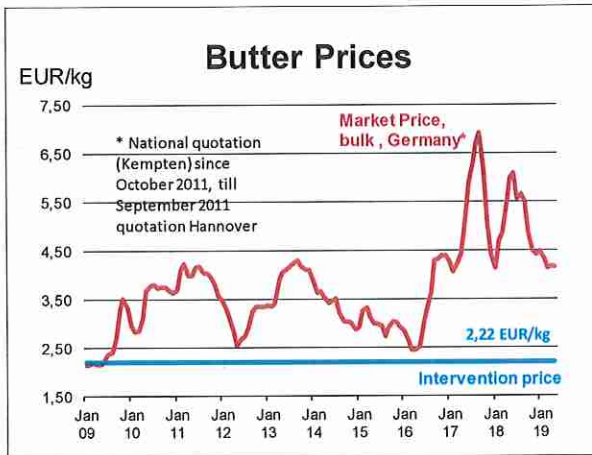
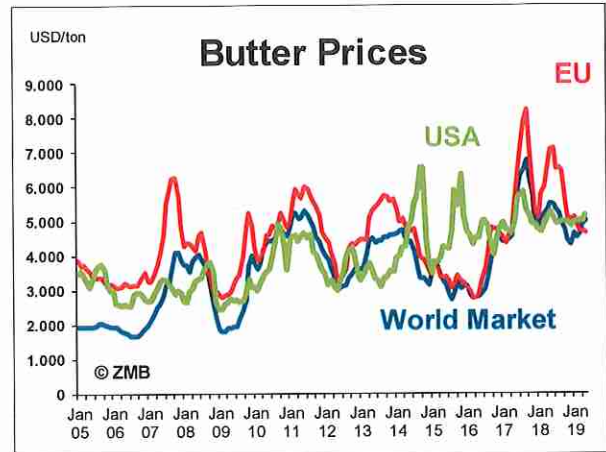
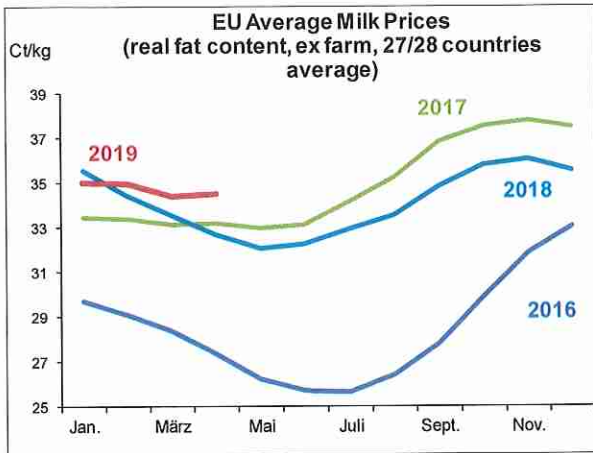
tonnes	Mon.	2017	2018	2019	± %
EU - 28	I - III	56.940	52.819	61.935	+ 17,3
USA	I - III	87.061	102.290	91.599	- 10,5
New Zealand	I - III	6.595	4.326	4.502	+ 4,1
Australia	I - III	1.576	1.579	1.412	- 10,6
Canada	I - III	205	57	359	+ 529,8
Turkey	I - II	554	386	689	+ 78,5
Total amount		152.931	161.457	160.496	- 0,6

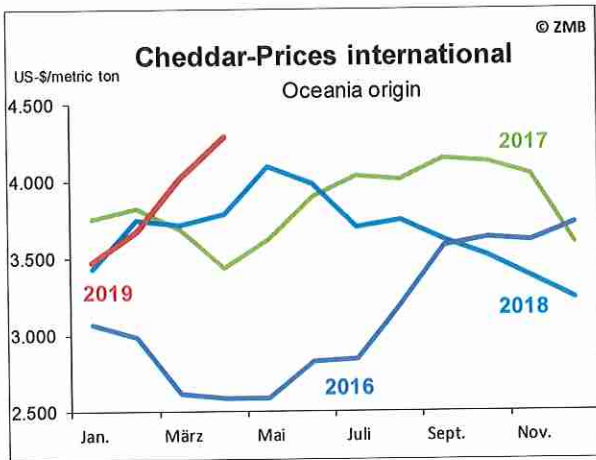
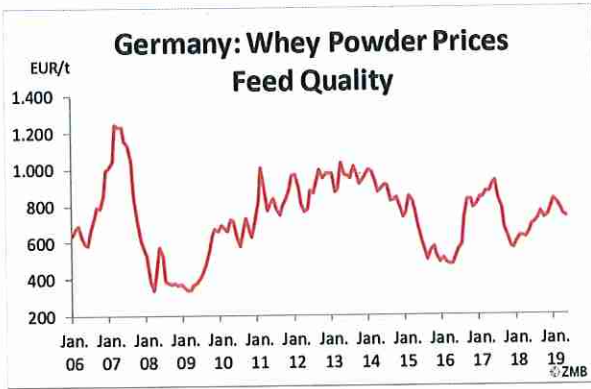
Sources: ZMB, EU-Comm., national statistics

© ZMB

Graphs









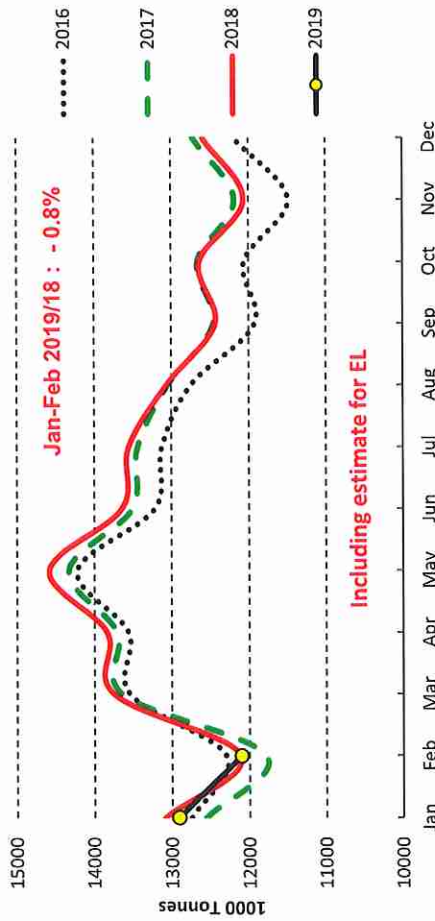
MARKET INFORMATION

Raw Milk



EU Cow's Milk collected

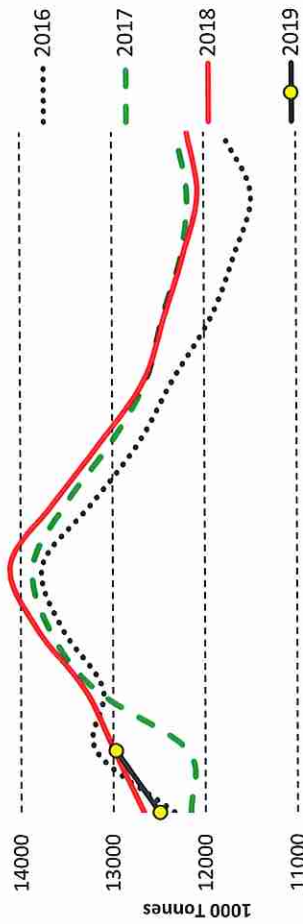
EU - Cows' milk collected



Source : Estat - Newcronos

Last update : Jan-Feb

EU - Cows' milk collected (30d adjusted months)

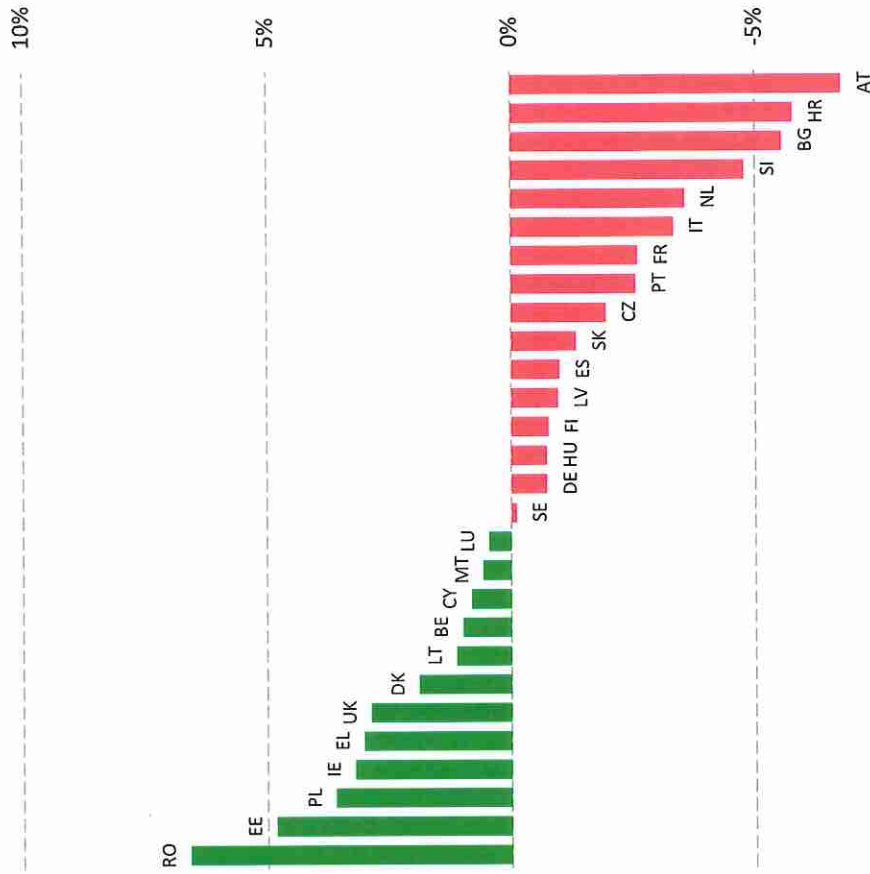


Source : Estat - Newcronos

Last update : Jan-Feb

Cows' milk collected

2019/18 Jan-Feb (y/y %Chg)



-10%

Source : EStat - Newcronos

Last update : Jan-Feb

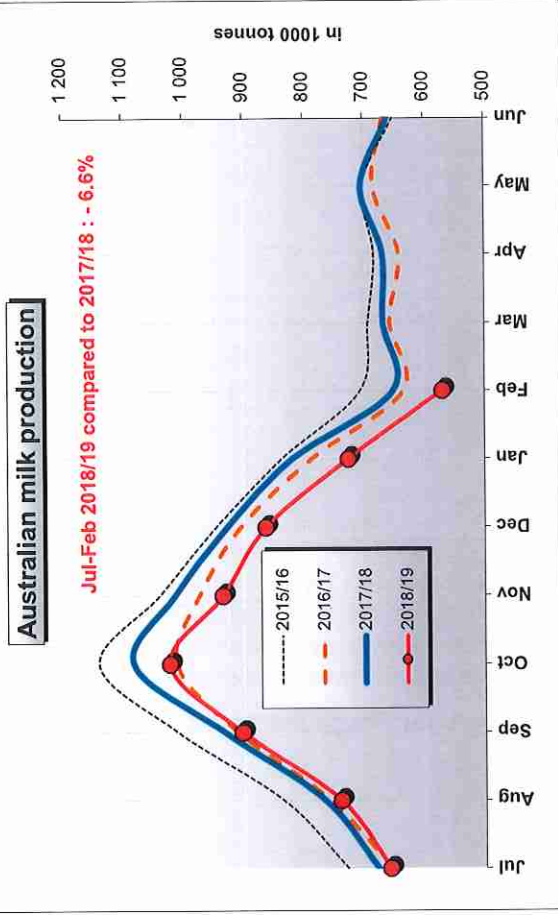


Raw Milk productions of New Zealand, Australia and USA

Australia milk production

Source : www.dairyaustralia.com.au

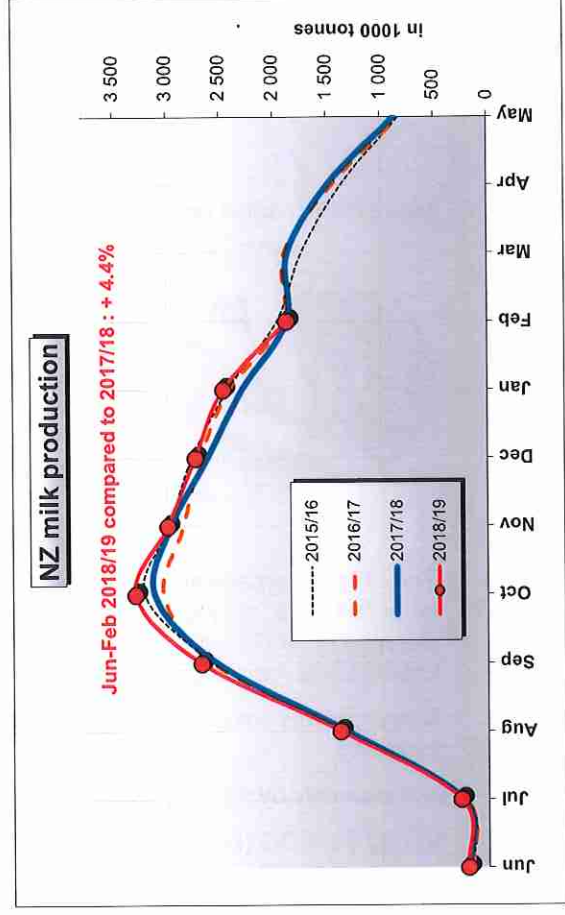
Season	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	%	% cumul.
Jul	667	656	680	657	680	729	656	678	658	- 2.9%	- 2.9%
Aug	770	771	794	757	793	835	759	766	740	- 3.4%	- 3.2%
Sep	901	957	960	927	991	1010	911	932	903	- 3.2%	- 3.2%
Oct	1063	1107	1091	1038	1131	1140	1012	1083	1023	- 5.5%	- 3.9%
Nov	996	1029	1036	1006	1063	1040	974	1014	935	- 7.8%	- 4.8%
Dec	906	962	950	964	975	945	905	927	863	- 6.9%	- 5.1%
Jan	807	850	805	830	858	837	787	818	726	- 11.3%	- 6.0%
Feb	651	698	634	644	704	706	634	651	569	- 12.6%	- 6.6%
Mar	666	686	638	662	713	693	657	668			
Apr	632	681	617	650	687	682	641	668			
May	674	701	649	702	730	702	684	703			
Jun	641	668	623	679	700	651	668	660			
Total to date	6 761	7 029	6 950	6 824	7 194	7 242	6 636	6 870	6 417	- 8.4%	+ 3.5%
% previous	+ 0.8%	+ 4.0%	- 1.1%	- 1.8%	+ 5.4%	+ 0.7%	- 8.4%	+ 3.5%	- 6.6%		
Total year	9 373	9 764	9 477	9 516	10 024	9 969	9 286	9 568			
% previous	+ 0.9%	+ 4.2%	- 2.9%	+ 0.4%	+ 5.3%	- 0.5%	- 6.9%	+ 3.0%			



NZ milk production

Source : www.dcanz.com

Season	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	%	% cumulé
Jun	96	127	131	122	136	147	147	178	198	+ 11.2%	+ 11.2%
Jul	149	162	195	185	195	229	231	248	262	+ 5.6%	+ 8.0%
Aug	1003	1067	1218	1330	1390	1379	1342	1321	1383	+ 4.7%	+ 5.5%
Sep	2061	2319	2436	2615	2752	2543	2570	2529	2682	+ 6.0%	+ 5.8%
Oct	2639	2890	2994	3156	3299	3211	3036	3118	3299	+ 5.8%	+ 5.8%
Nov	2530	2645	2848	2961	3045	2980	2845	2965	2995	+ 1.0%	+ 4.4%
Dec	2144	2432	2595	2718	2809	2765	2689	2620	2735	+ 4.4%	+ 4.4%
Jan	2020	2208	2302	2473	2481	2428	2412	2294	2471	+ 7.7%	+ 4.9%
Feb	1683	1874	1764	1973	1861	1966	1909	1874	1875	+ 0.1%	+ 4.4%
Mar	1592	1737	1446	1764	1749	1735	1895	1867			
Apr	1269	1479	969	1287	1396	1361	1447	1489			
May	709	802	580	719	796	824	818	869			
Total to date	14 325	15 724	16 483	17 533	17 968	17 648	17 181	17 147	17 900	- 2.6%	+ 4.4%
% previous	+ 1.6%	+ 9.8%	+ 4.8%	+ 6.4%	+ 2.5%	- 1.8%	- 2.6%	- 0.2%	+ 4.4%		
Total year	17 895	19 742	19 478	21 303	21 909	21 568	21 341	21 372			
% previous	+ 5.2%	+ 10.3%	- 1.3%	+ 9.4%	+ 2.8%	- 1.6%	- 1.1%	+ 0.1%			

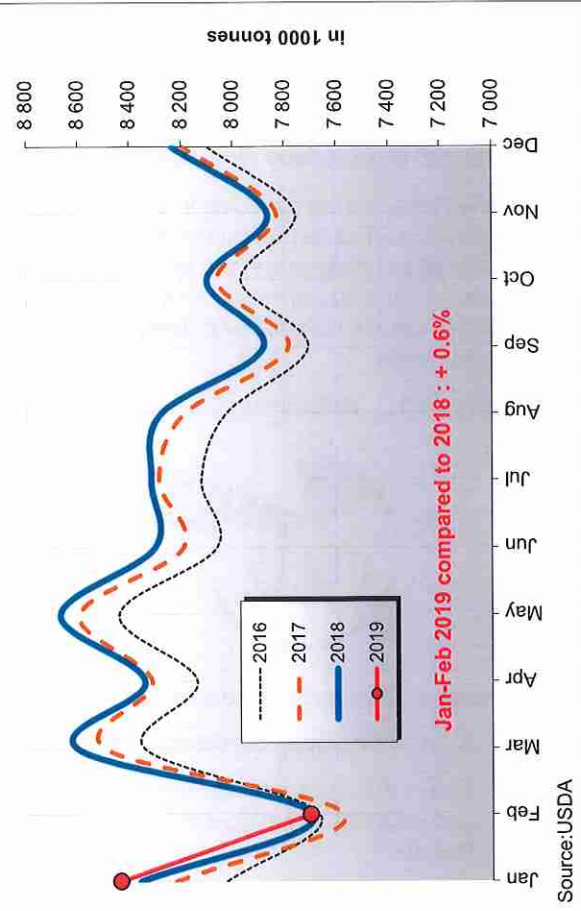


Source : USDA

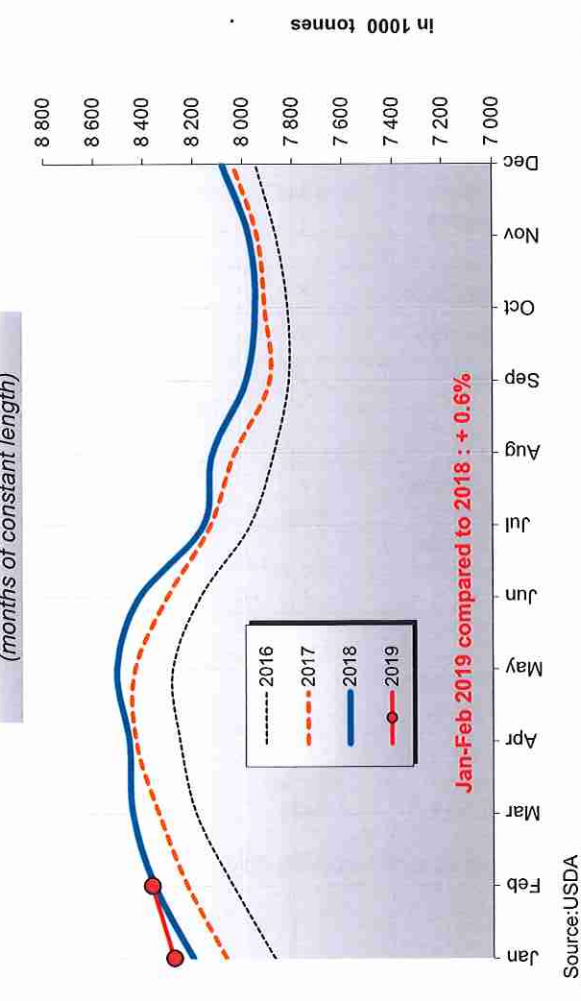
U.S. milk production

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	%	% cumul.
Jan	7 078	7 247	7 319	7 267	7 436	7 718	7 760	7 840	8 022	8 025	8 223	8 360	8 439	+ 0.9%	+ 0.9%
Feb	6 496	6 884	6 692	6 694	6 839	7 398	7 148	7 215	7 333	7 667	7 572	7 693	7 704	+ 0.1%	+ 0.6%
Mar	7 317	7 465	7 477	7 536	7 706	8 037	8 018	8 087	8 203	8 347	8 500	8 607			
Apr	7 150	7 314	7 325	7 446	7 553	7 816	7 824	7 929	8 068	8 141	8 315	8 342			
May	7 339	7 578	7 623	7 729	7 837	7 984	8 080	8 207	8 359	8 443	8 596	8 670			
Jun	7 020	7 231	7 228	7 418	7 492	7 564	7 682	7 858	7 940	8 061	8 192	8 303			
Jul	7 128	7 255	7 266	7 455	7 475	7 523	7 615	7 908	8 013	8 123	8 286	8 316			
Aug	7 042	7 147	7 138	7 300	7 449	7 440	7 615	7 813	7 894	8 025	8 187	8 278			
Sep	6 745	6 862	6 821	7 049	7 159	7 115	7 181	7 491	7 537	7 706	7 782	7 878			
Oct	6 972	7 083	6 994	7 212	7 384	7 379	7 473	7 743	7 770	7 967	8 060	8 100			
Nov	6 810	6 900	6 836	7 030	7 176	7 261	7 259	7 507	7 570	7 756	7 829	7 864			
Dec	7 091	7 212	7 152	7 325	7 510	7 630	7 616	7 863	7 926	8 097	8 191	8 235			
Total to date	13 574	14 130	14 011	13 961	14 274	15 116	14 909	15 055	15 354	15 693	15 795	16 053	16 143	+ 1.6%	+ 0.6%
% previous	+ 4.1%	- 0.8%	- 0.4%	+ 2.2%	+ 5.9%	- 1.4%	+ 1.0%	+ 3.0%	+ 2.2%	+ 0.7%	+ 1.5%	+ 0.7%	+ 0.9%		
Total	84 187	86 178	85 870	87 461	89 015	90 865	91 270	93 460	94 634	96 359	97 733	98 645			
% previous	+ 2.4%	- 0.4%	+ 1.9%	+ 1.8%	+ 2.1%	+ 0.4%	+ 2.4%	+ 3.7%	+ 1.8%	+ 1.4%	+ 0.9%	+ 0.9%			

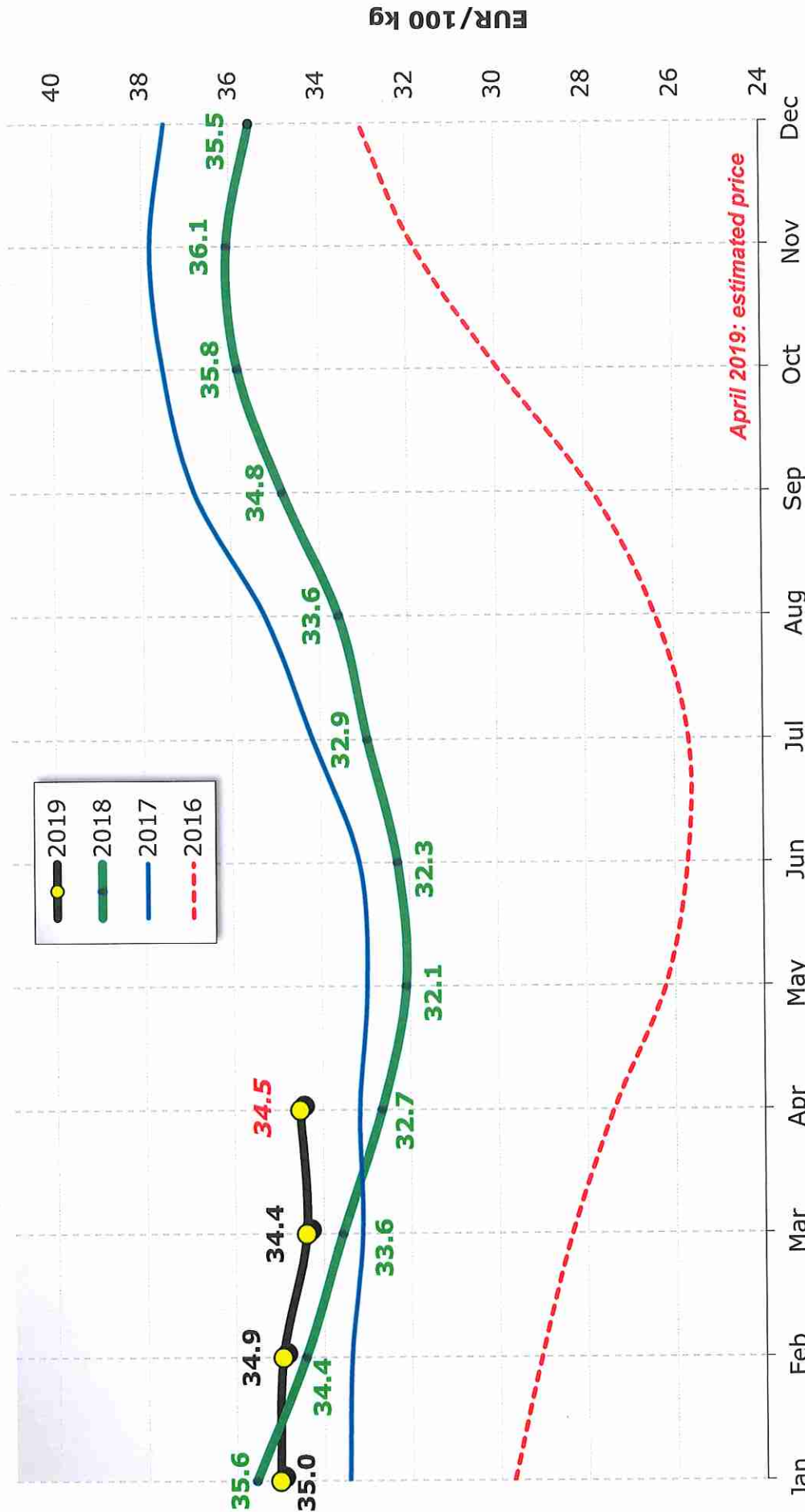
U.S. milk production



Adjusted U.S. milk production (months of constant length)

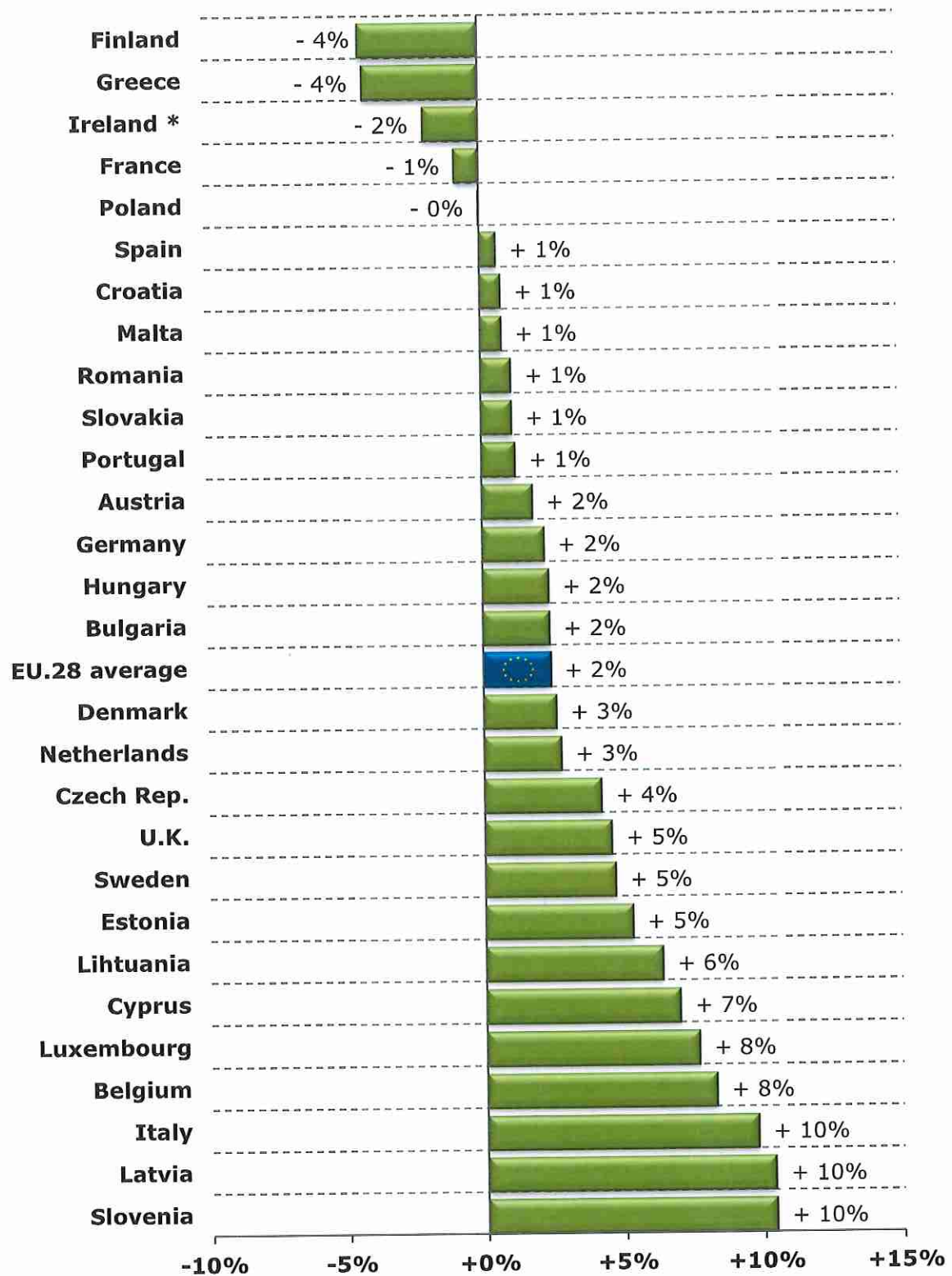


Milk Prices paid to the Producers EU (weight. avg.)



Source : Member States Reg. (EU) No 2017/1185 Article 12(a) - Annex II.4(a))

Raw Milk Price evolution in March 2019 compared to March 2018

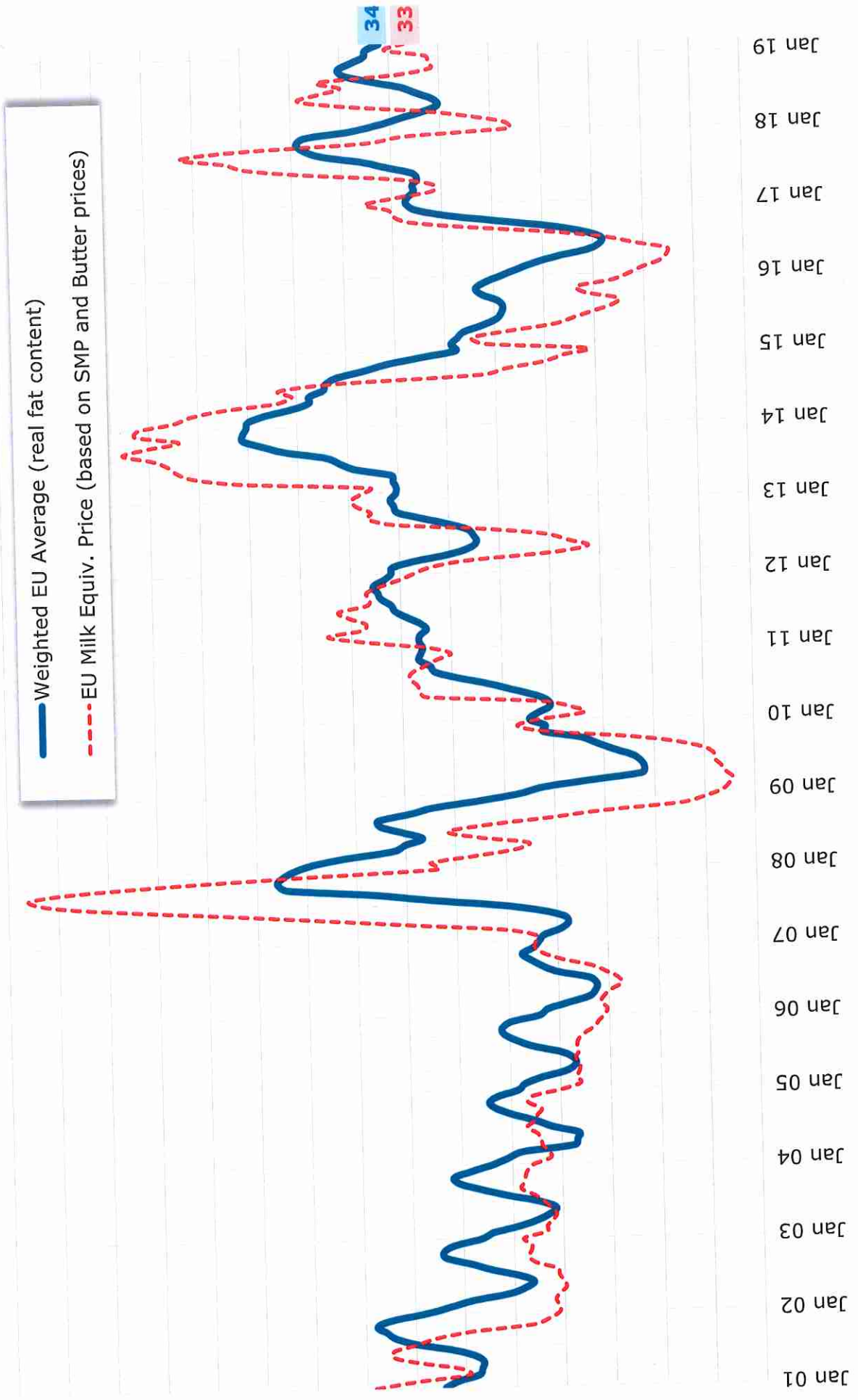


* : estimated figures for Mar 2019

Source : Member States (Reg. (EU) No 2017/1185 Article 12(a) - Annex II.4(a))

EU Raw Milk Prices Evolution (up to March 2019)

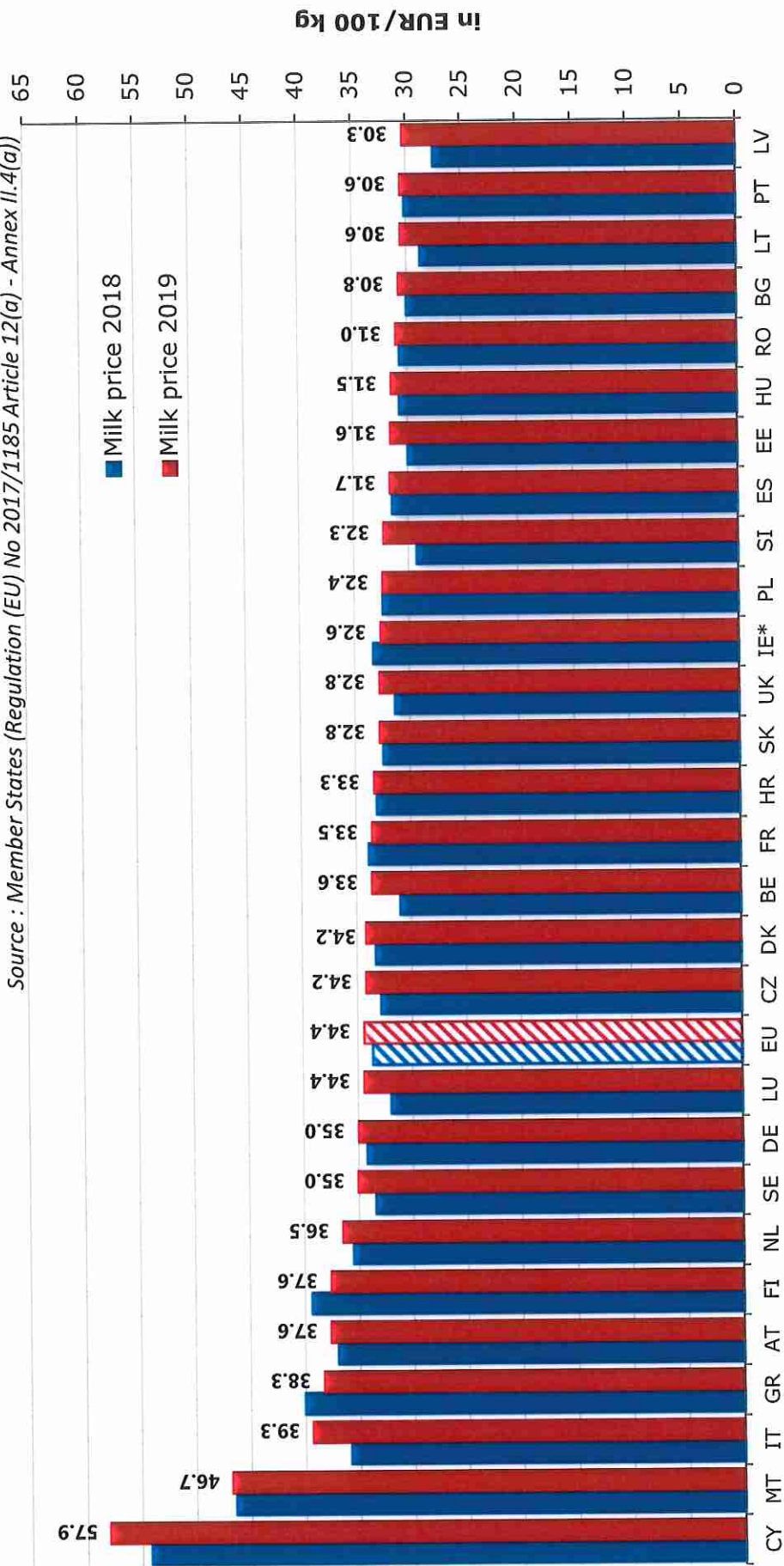
EUR/



EU MILK PRICES

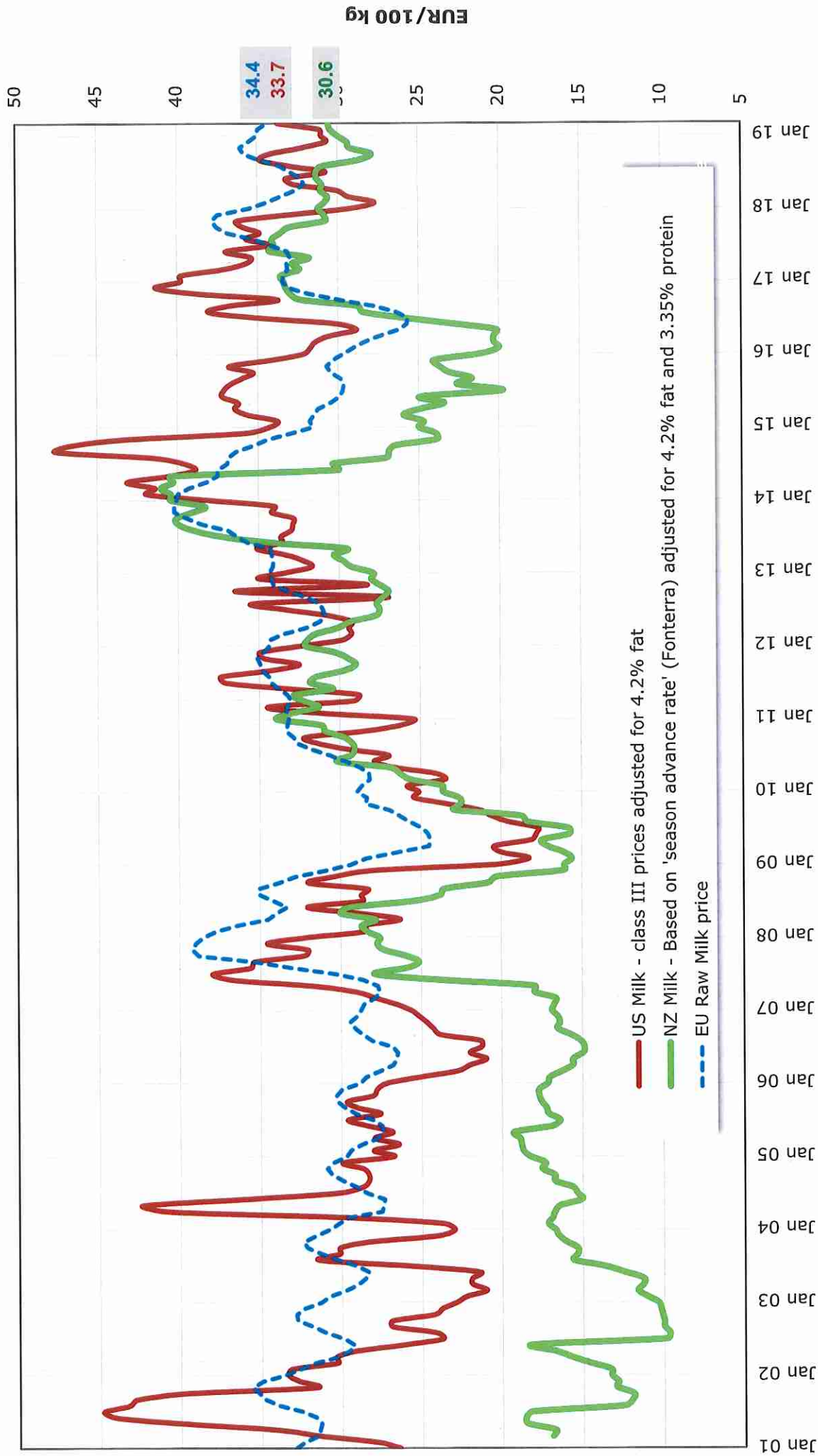
(Mar 2019 vs Mar 2018)

Source : Member States (Regulation (EU) No 2017/1185 Article 12(a) - Annex II.4(a))



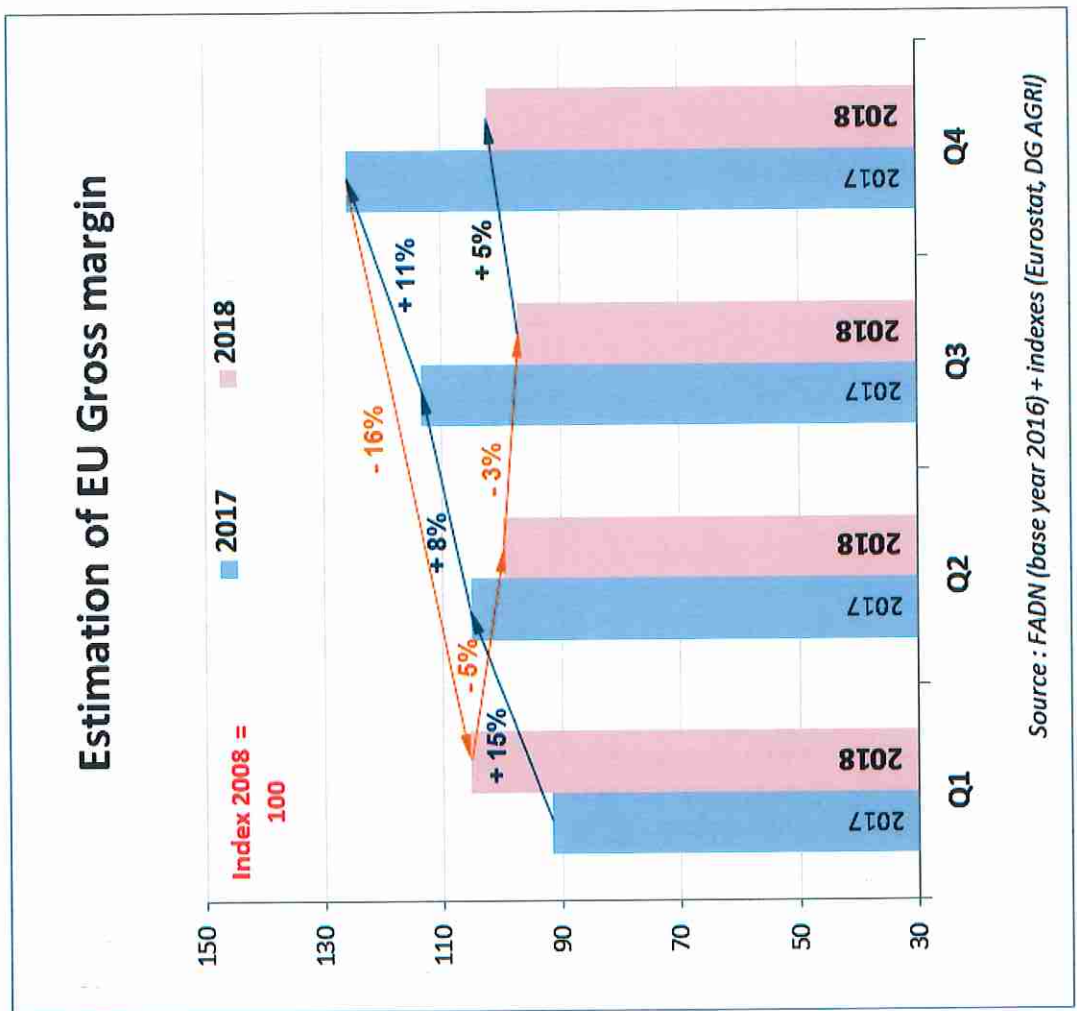
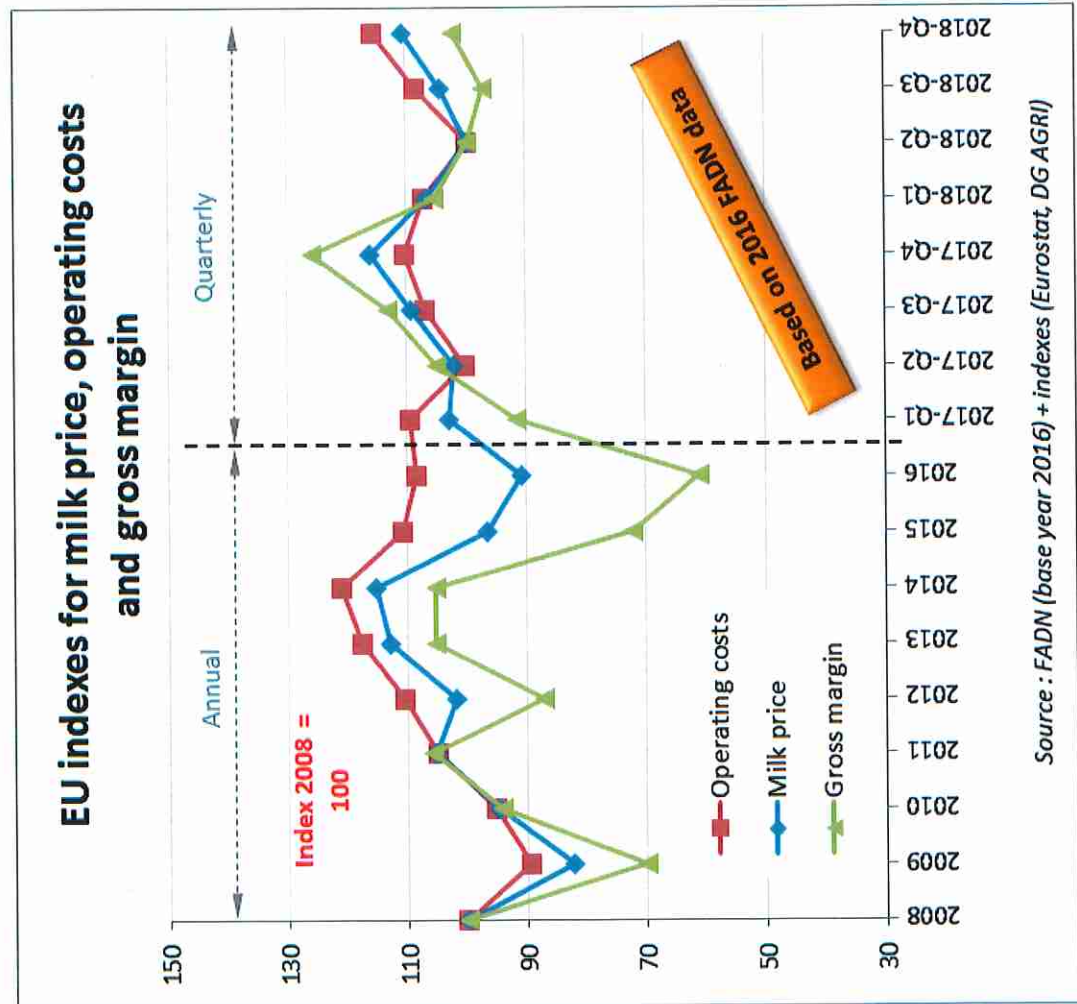
* : estimated figures for Mar 2019

U.S. and New Zealand Milk Prices Evolution



Source : USDA, LTO

EU GROSS MARGIN (4th Quarter 2018)

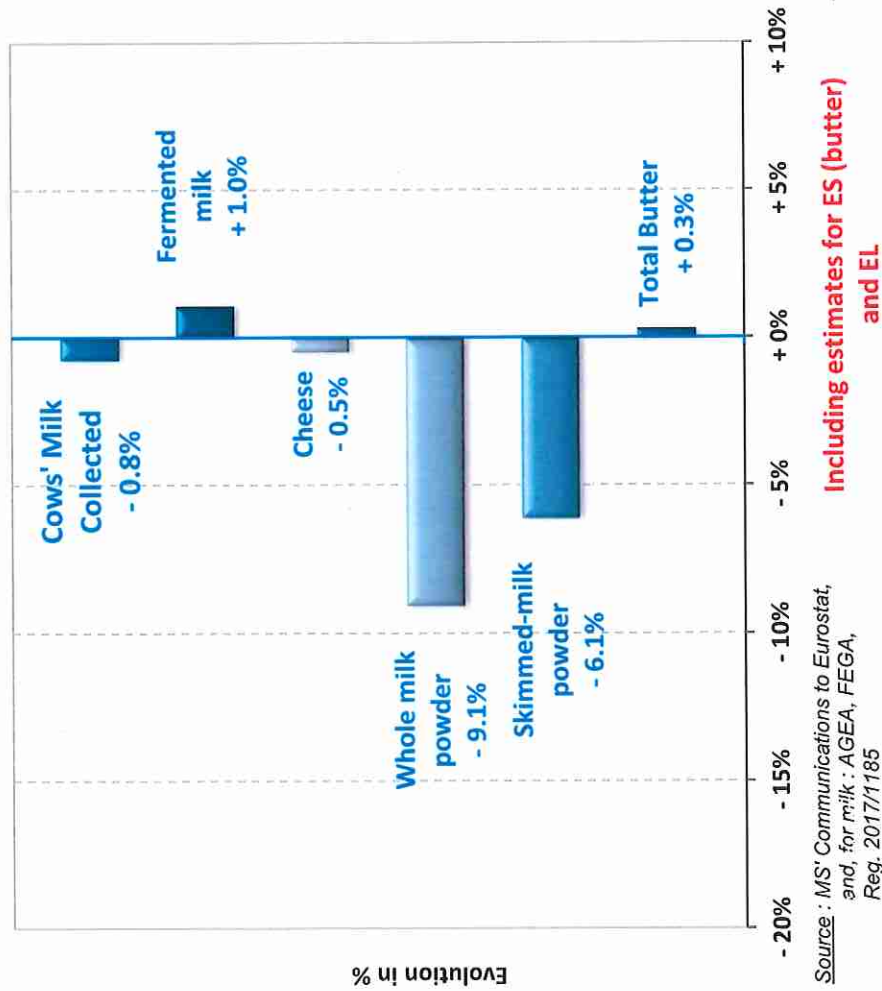




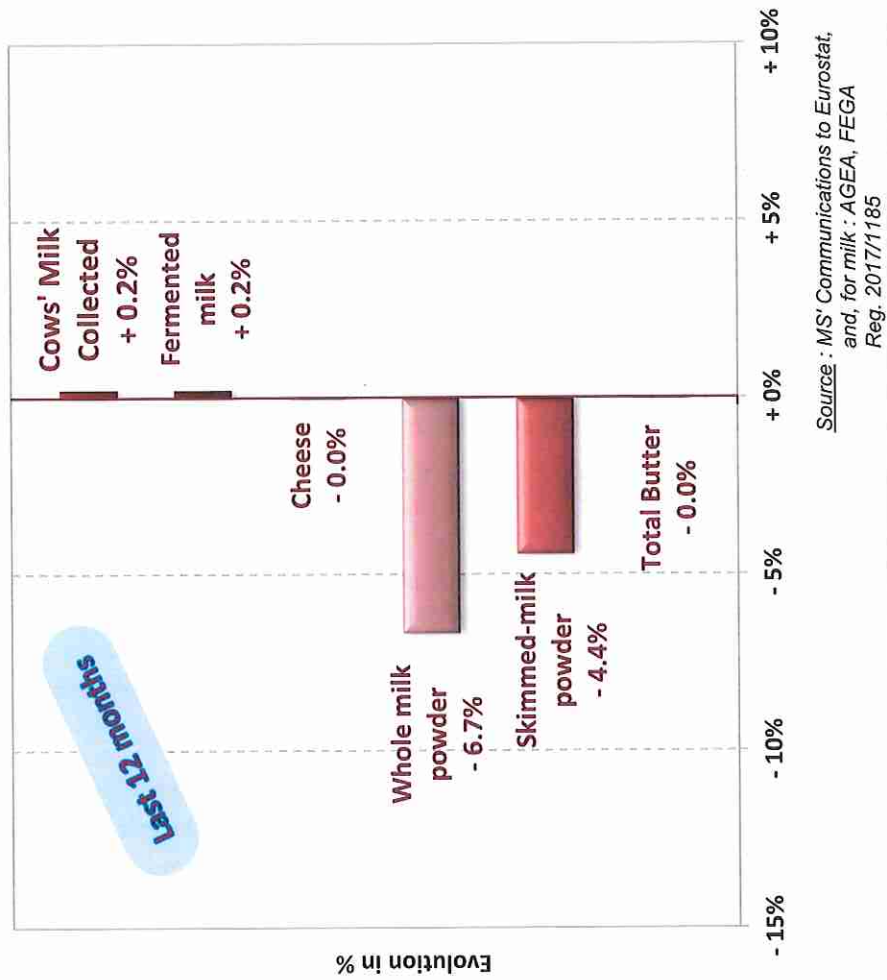
MARKET INFORMATION

All dairy commodities

EU-28 Deliveries/Productions development
(Jan-Feb 2019 compared to Jan-Feb 2018)

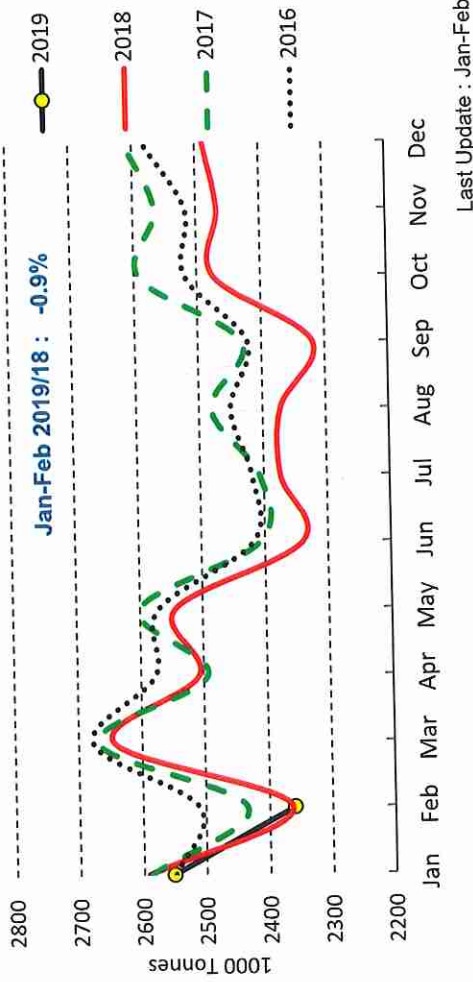


EU-28 Deliveries/Productions development
(Mar 2018-Feb 2019 compared to Mar 2017-Feb 2018)

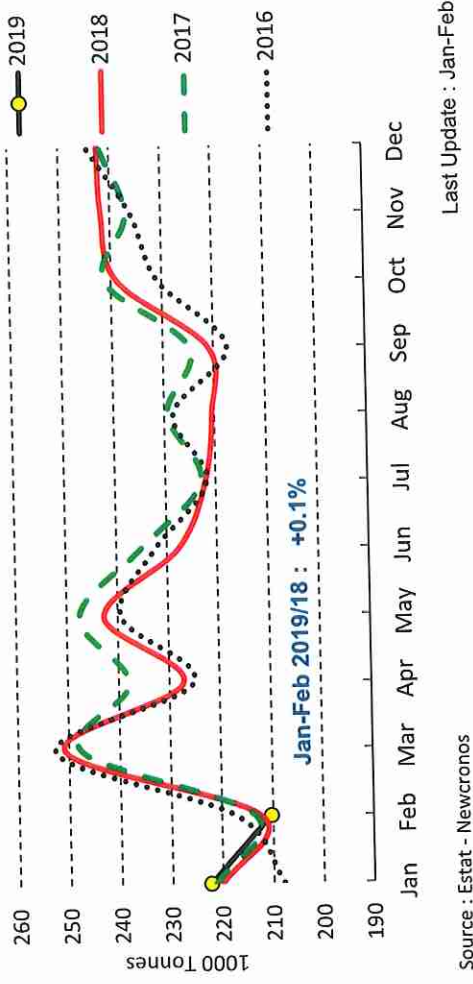


PRODUCTION of the MAIN DAIRY PRODUCTS (1/2)

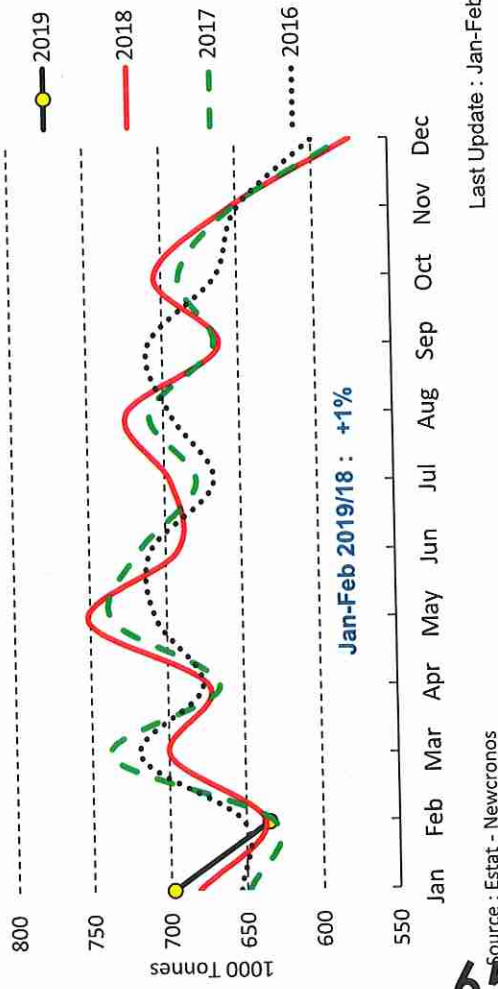
EU - Drinking milk



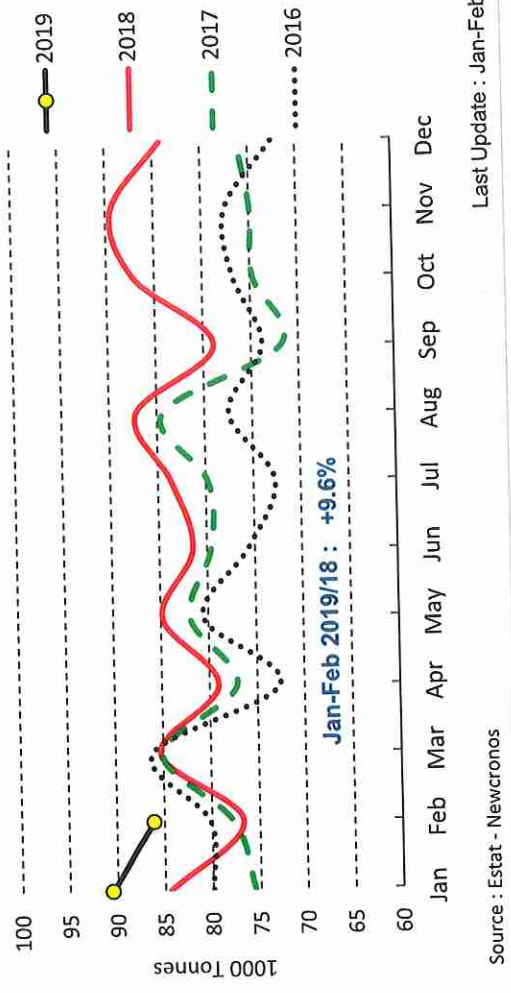
EU - Cream for direct consumption



EU - Acidified milk

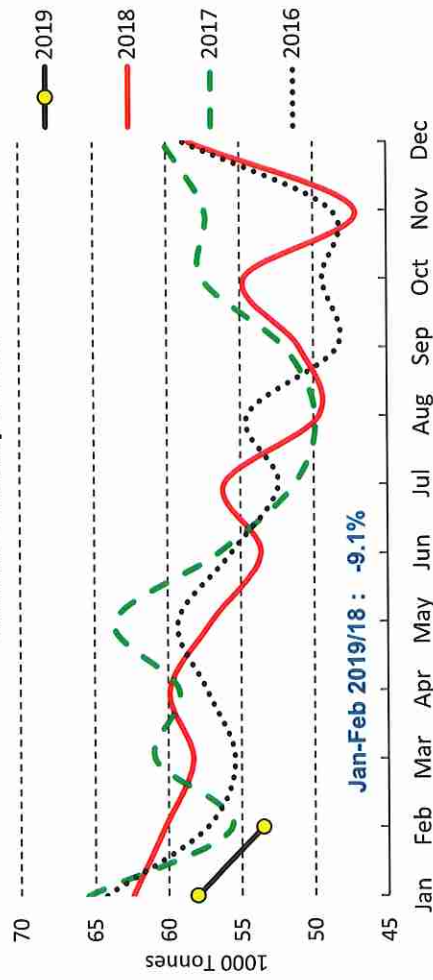


EU - Concentrated milk

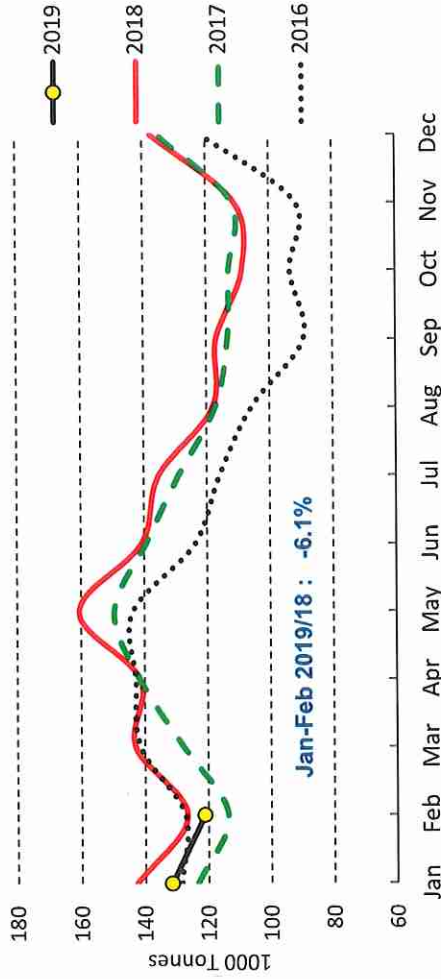


PRODUCTION of the MAIN DAIRY PRODUCTS (2/2)

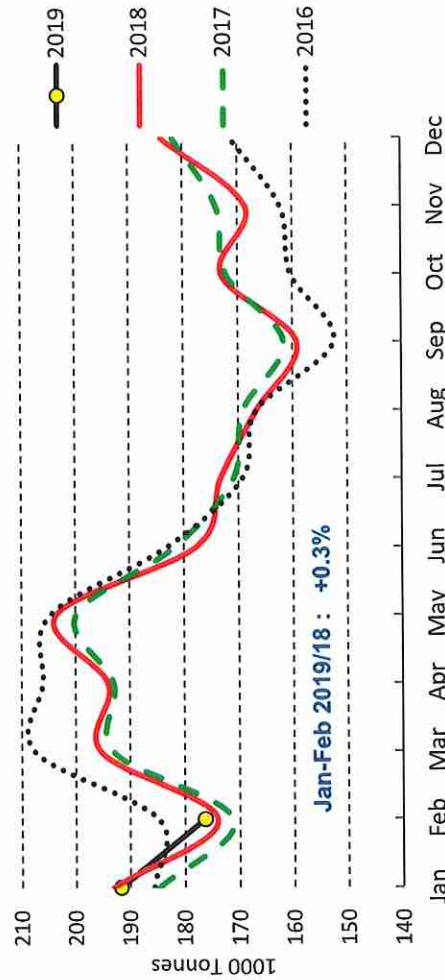
EU - Milk powder cream, whole milk powder and partly skimmed milk powder



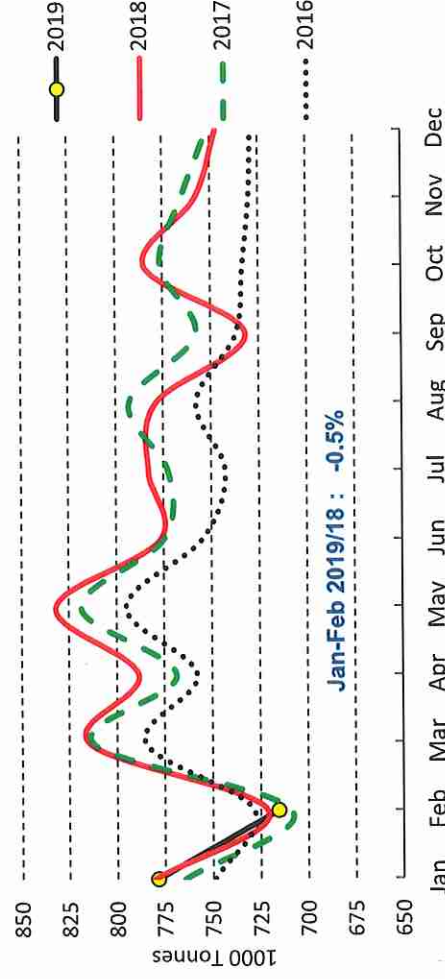
EU - Skimmed-milk powder



EU - Butter



EU - Cheese



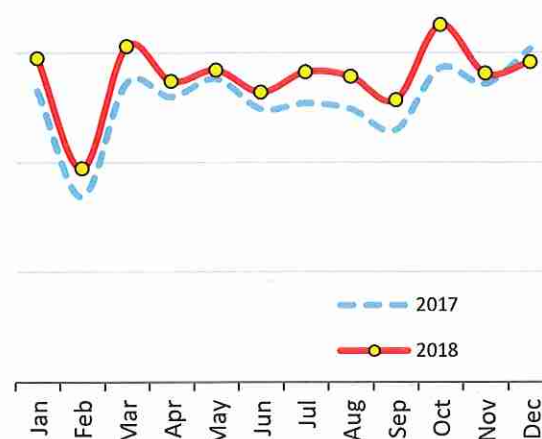
Production of Dairy products in the U.S.A.

Quantiy in Tonnes

Source : USDA/NASS

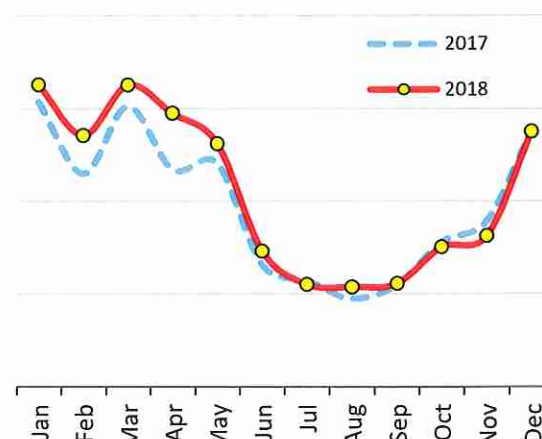
TOTAL CHEESE 1/

	2017	2018	var %
January	482 728	497 373	+ 3.0%
February	434 383	447 228	+ 3.0%
March	486 169	502 757	+ 3.4%
April	479 832	486 903	+ 1.5%
May	488 143	491 971	+ 0.8%
June	474 401	481 951	+ 1.6%
July	477 032	491 137	+ 3.0%
August	474 476	489 156	+ 3.1%
September	464 822	478 300	+ 2.9%
October	492 994	512 510	+ 4.0%
November	485 647	490 341	+ 1.0%
December	501 442	495 481	- 1.2%
Total Jan-Dec	5 742 067	5 865 108	+ 2.1%
Year Total	5 742 067		



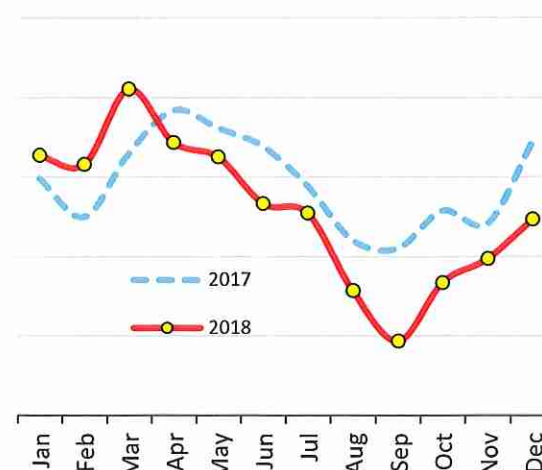
BUTTER

	2017	2018	var %
January	80 767	82 594	+ 2.3%
February	73 034	77 163	+ 5.7%
March	80 295	82 575	+ 2.8%
April	73 462	79 513	+ 8.2%
May	74 116	76 253	+ 2.9%
June	63 140	64 655	+ 2.4%
July	61 518	61 036	- 0.8%
August	59 490	60 773	+ 2.2%
September	61 032	61 144	+ 0.2%
October	65 622	65 081	- 0.8%
November	67 912	66 289	- 2.4%
December	77 612	77 546	- 0.1%
Total Jan-Dec	838 000	854 623	+ 2.0%
Year Total	838 000		



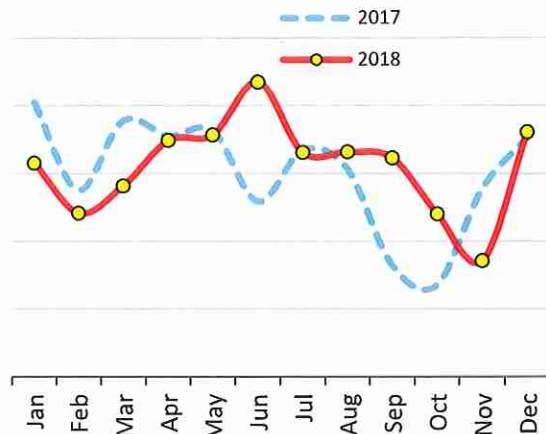
NONFAT DRY MILK, HUMAN

	2017	2018	var %
January	69 784	72 711	+ 4.2%
February	64 968	71 592	+ 10.2%
March	72 990	81 054	+ 11.0%
April	78 390	74 325	- 5.2%
May	76 163	72 526	- 4.8%
June	73 851	66 638	- 9.8%
July	68 867	65 452	- 5.0%
August	62 030	55 703	- 10.2%
September	61 041	49 363	- 19.1%
October	65 775	56 729	- 13.8%
November	64 156	59 739	- 6.9%
December	74 395	64 695	- 13.0%
Total Jan-Dec	832 411	790 528	- 5.0%
Year Total	832 411		



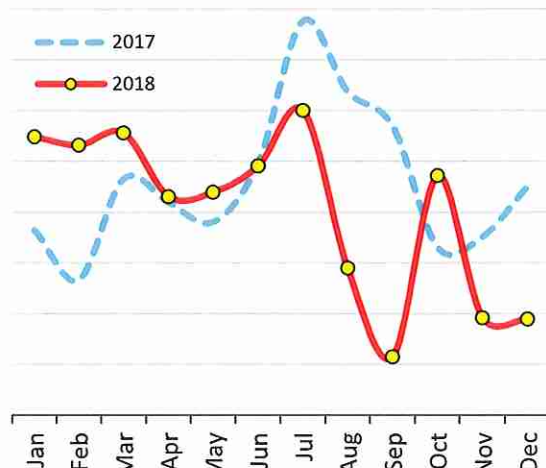
SKIM MILK POWDER, TOTAL

	2017	2018	var %
January	25 215	20 753	- 17.7%
February	18 775	17 085	- 9.0%
March	23 901	19 076	- 20.2%
April	22 773	22 428	- 1.5%
May	23 139	22 845	- 1.3%
June	17 924	26 738	+ 49.2%
July	21 701	21 540	- 0.7%
August	20 327	21 573	+ 6.1%
September	13 200	21 134	+ 60.1%
October	11 778	16 993	+ 44.3%
November	18 874	13 565	- 28.1%
December	22 632	23 043	+ 1.8%
Total Jan-Dec	240 237	246 774	+ 2.7%
Year Total	240 237		



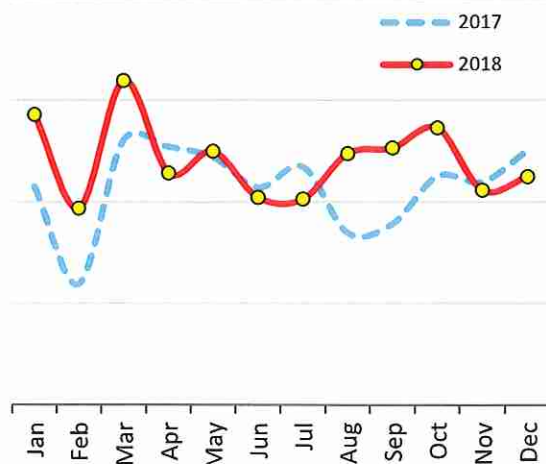
DRY WHEY, TOTAL

	2017	2018	var %
January	37 310	40 968	+ 9.8%
February	35 333	40 641	+ 15.0%
March	39 321	41 120	+ 4.6%
April	38 392	38 623	+ 0.6%
May	37 625	38 792	+ 3.1%
June	39 945	39 827	- 0.3%
July	45 542	42 000	- 7.8%
August	42 763	35 813	- 16.3%
September	41 414	32 308	- 22.0%
October	36 628	39 448	+ 7.7%
November	37 039	33 845	- 8.6%
December	39 020	33 795	- 13.4%
Total Jan-Dec	470 332	457 180	- 2.8%
Year Total	470 332		



WHEY PROTEIN CONCENTRATE

	2017	2018	var %
January	18 293	19 714	+ 7.8%
February	16 379	17 867	+ 9.1%
March	19 211	20 381	+ 6.1%
April	19 079	18 564	- 2.7%
May	18 875	18 992	+ 0.6%
June	18 278	18 081	- 1.1%
July	18 684	18 052	- 3.4%
August	17 390	18 945	+ 8.9%
September	17 563	19 060	+ 8.5%
October	18 505	19 455	+ 5.1%
November	18 394	18 229	- 0.9%
December	19 012	18 495	- 2.7%
Total Jan-Dec	219 664	225 834	+ 2.8%
Year Total	219 664		

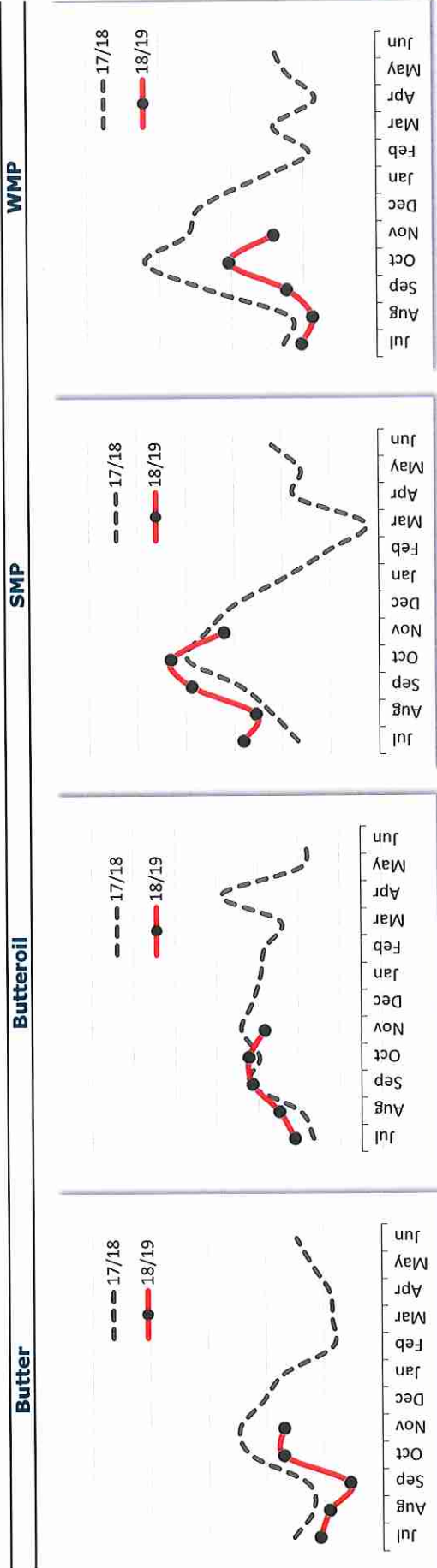


Production of Dairy products in AUSTRALIA

in Tonnes

Source : Dairy Australia Limited

	Butter			Butteroil			SMP			WMP		
	17/18	18/19	Var%	17/18	18/19	Var%	17/18	18/19	Var%	17/18	18/19	Var%
July	5 054	4 151	- 17.9%	462	642	+ 39.0%	13 433	19 057	+ 41.9%	5 143	4 147	- 19.4%
August	4 382	3 818	- 12.9%	589	790	+ 34.1%	16 061	17 767	+ 10.6%	4 750	3 547	- 25.3%
September	4 597	3 110	- 32.4%	1 076	1 050	- 2.4%	19 314	24 394	+ 26.3%	9 257	4 963	- 46.4%
October	6 527	5 396	- 17.3%	981	1 085	+ 10.6%	24 838	26 604	+ 7.1%	12 791	8 148	- 36.3%
November	6 917	5 382	- 22.2%	1 158	932	- 19.6%	22 906	21 062	- 8.1%	10 465	5 665	- 45.9%
December	6 114			1 050			20 055			9 777		
January	5 389			970			14 811			6 833		
February	3 692			932			10 204			3 712		
March	3 701			770			6 310			5 691		
April	3 784			1 342			13 624			3 356		
May	4 384			570			13 038			4 955		
June	4 930			525			16 333			5 767		
Total Jul-Nov	27 477	21 857	- 20.5%	4 266	4 499	+ 5.5%	96 551	108 884	+ 12.8%	42 407	26 470	- 37.6%
Year Total	59 471			10 424			190 926			82 499		



Production of Dairy products in AUSTRALIA

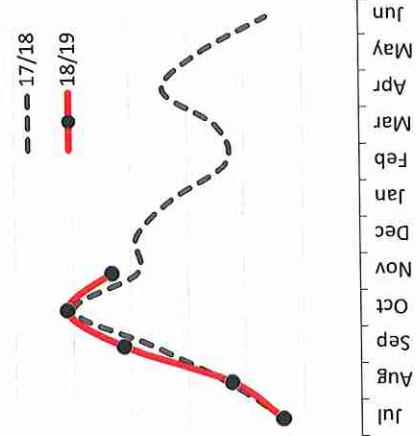
in Tonnes

Source : Dairy Australia Limited

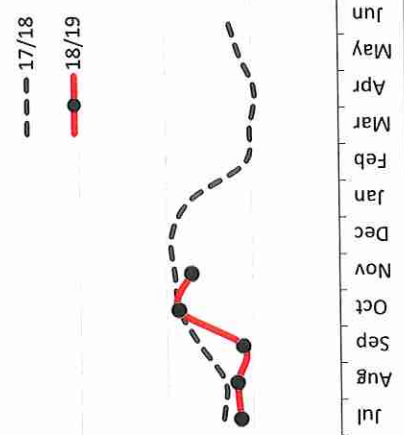
	Cheese*			BMP			Whey Powder		
	17/18	18/19	Var%	17/18	18/19	Var%	17/18	18/19	Var%
July	21 587	21 805	+ 1.0%	540	462	- 14.5%	3 177	1 810	- 43.0%
August	26 645	26 215	- 1.6%	531	475	- 10.5%	3 271	3 578	+ 9.4%
September	33 046	35 575	+ 7.7%	645	448	- 30.6%	4 470	5 064	+ 13.3%
October	39 976	40 511	+ 1.3%	742	745	+ 0.5%	6 005	5 877	- 2.1%
November	34 370	36 605	+ 6.5%	763	685	- 10.2%	5 030	5 599	+ 11.3%
December	34 451			777			4 992		
January	31 349			688			4 486		
February	26 571			434			3 049		
March	27 380			409			3 323		
April	32 058			387			4 335		
May	29 026			459			3 973		
June	23 055			511			3 357		
Total Jul-Nov	155 623	160 711	+ 3.3%	3 220	2 815	- 12.6%	21 952	21 929	- 0.1%
Year Total	359 512			6 885			49 469		

* Cheese figures are adjusted for this report until production figures from smaller manufacturers are received

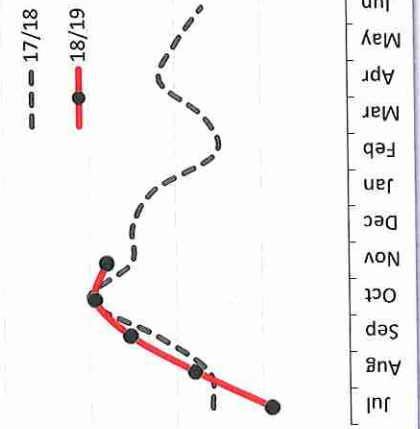
Cheese*



BMP

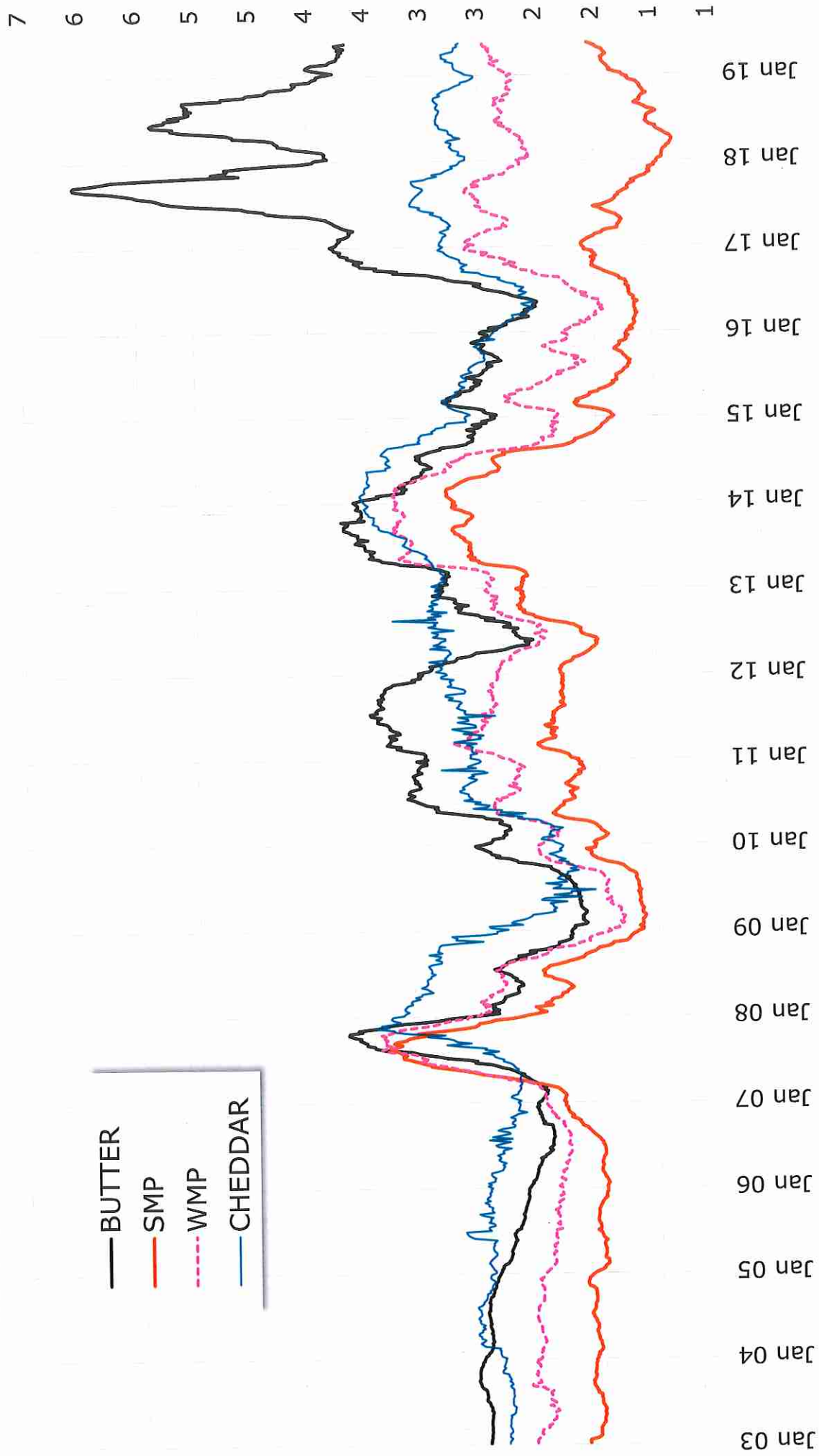


Whey Powder



EU Dairy Quotations

(EU Average Prices based on MS communication and weighted by production)



EU Internal Market Prices of Dairy Products

Source: Regulation (EU) No 2017/1185 Article 11 - Annex I.7

BUTTER	SMP	WMP	CHEDDAR	EDAM	GOUDA	EMMENTAL	WHEYPOWDER
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Latest Quotations : week 20 ending 19/05/2019

in EUR/100 kg

	415	204	294	315	307	309	451	82
% last week	- 2.1%	+ 2.0%	- 0.1%	- 0.6%	+ 0.0%	- 1.2%	+ 1.8%	- 0.3%
% year - 1	- 27%	+ 40%	+ 6%	- 5%	+ 5%	+ 5%	- 1%	+ 10%

Week ending :

in EUR/100 kg

07/10/2018	504	156	276	332	320	321	427	82
14/10/2018	501	153	272	334	323	321	430	82
21/10/2018	487	155	271	331	322	322	435	82
28/10/2018	484	156	270	329	322	321	448	81
04/11/2018	481	157	274	324	321	321	429	82
11/11/2018	462	159	273	321	324	322	427	84
18/11/2018	461	159	272	318	319	320	449	84
25/11/2018	459	160	274	314	317	318	440	84
02/12/2018	462	162	273	314	317	319	439	84
09/12/2018	446	167	269	308	313	317	433	84
16/12/2018	445	169	271	305	312	315	457	84
23/12/2018	441	169	273	303	312	316	447	
30/12/2018	440	173	273	303	312	314	443	84
06/01/2019	435	174	270	310	313	313	448	85
13/01/2019	426	180	276	313	309	313	443	87
20/01/2019	437	185	278	316	309	313	445	89
27/01/2019	445	184	281	319	309	314	441	88
03/02/2019	450	186	282	320	309	314	467	89
10/02/2019	448	187	284	320	306	308	440	86
17/02/2019	444	189	287	320	305	307	443	88
24/02/2019	431	190	289	321	304	308	437	88
03/03/2019	429	191	281	327	304	307	442	86
10/03/2019	424	191	287	326	304	307	467	86
17/03/2019	422	192	286	330	306	308	455	87
24/03/2019	422	190	288	330	307	308	441	86
31/03/2019	420	188	287	331	305	309	444	85
07/04/2019	421	188	289	325	306	309	442	84
14/04/2019	418	191	289	320	307	308	442	84
21/04/2019	422	191	291	320	306	309	438	84
28/04/2019	416	195	288	320	306	309	444	83
05/05/2019	423	197	294	317	305	309	443	82
12/05/2019	424	200	295	317	307	312	443	82
19/05/2019	415	204	294	315	307	309	451	82

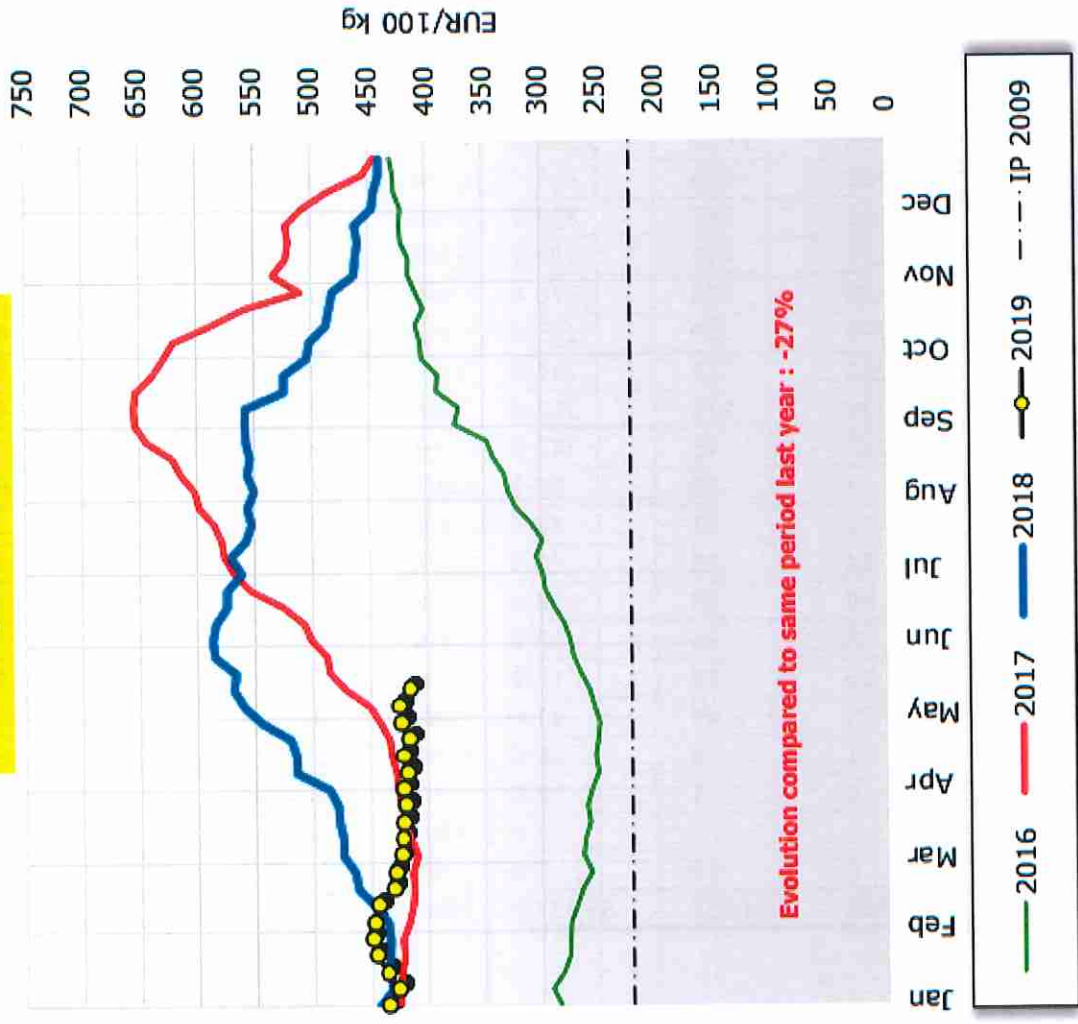


MARKET INFORMATION

Focus on Butter

Weekly EU BUTTER Prices

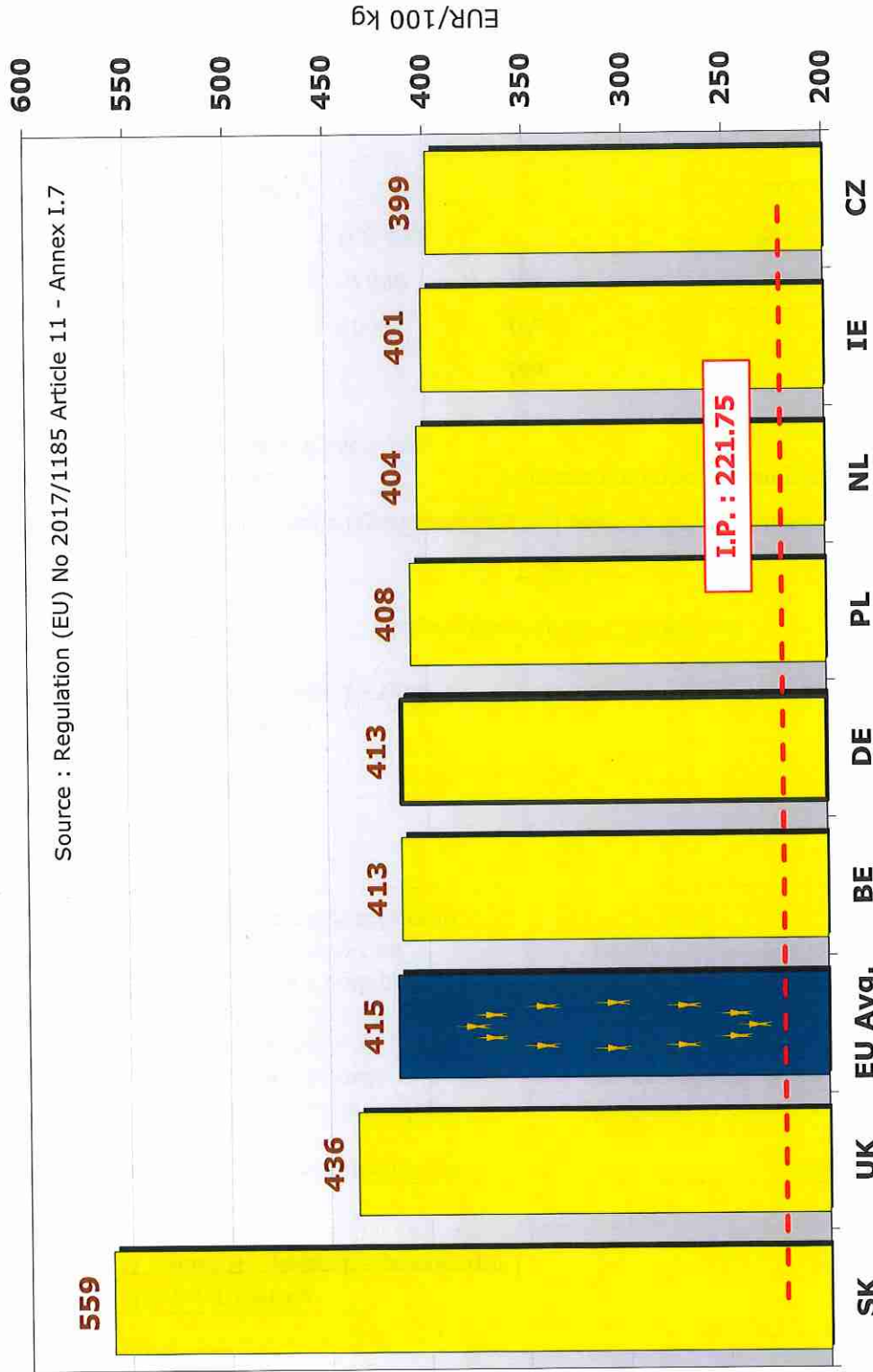
Latest price : 415 EUR/100kg



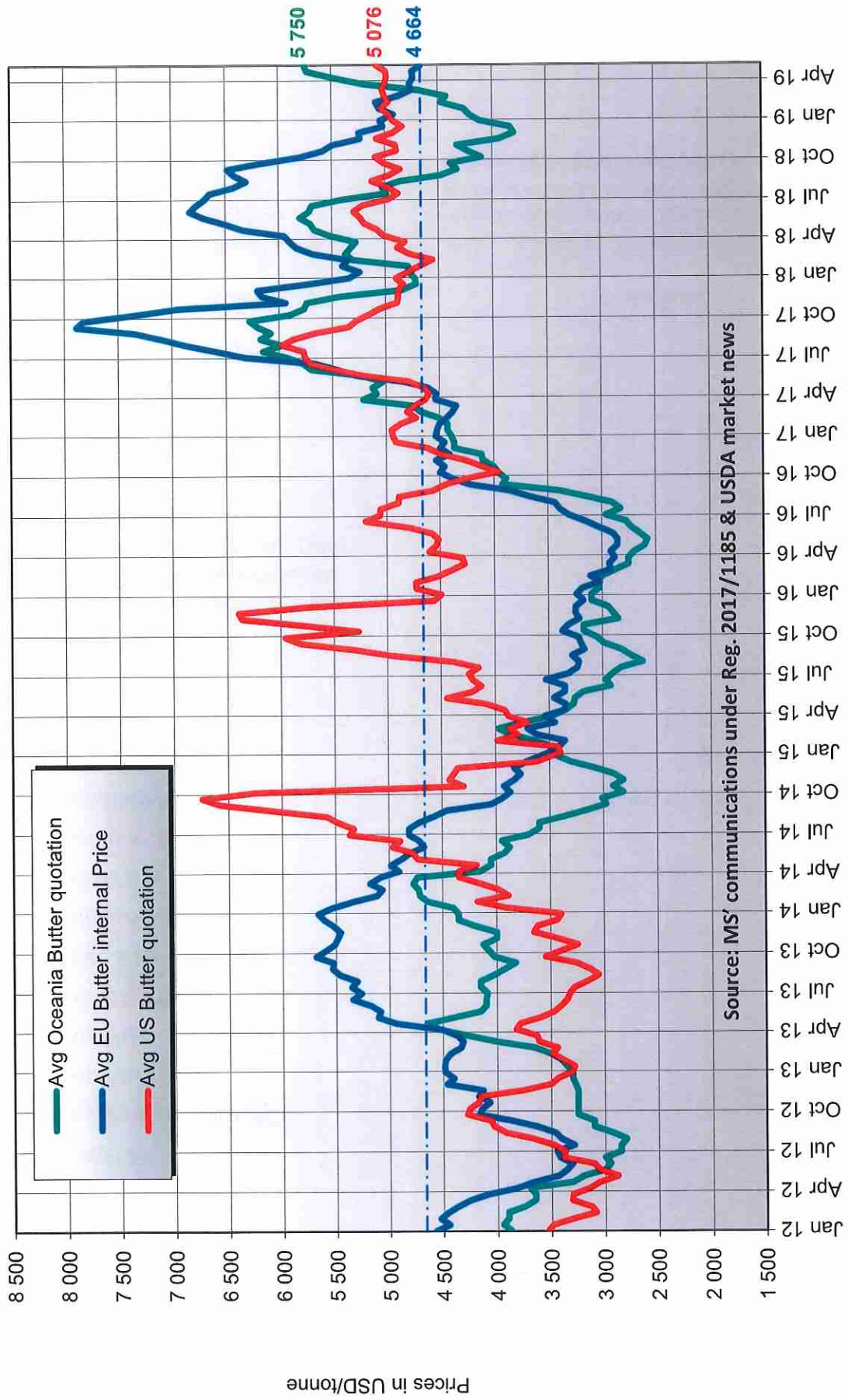
EU Commission - 2019

EU BUTTER Prices (up to 19.05.2019)

Source : Regulation (EU) No 2017/1185 Article 11 - Annex I.7

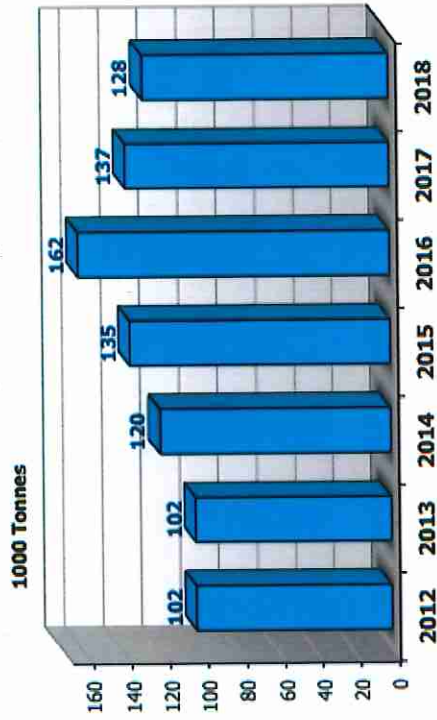


EU/US/Oceania Quotations of Butter

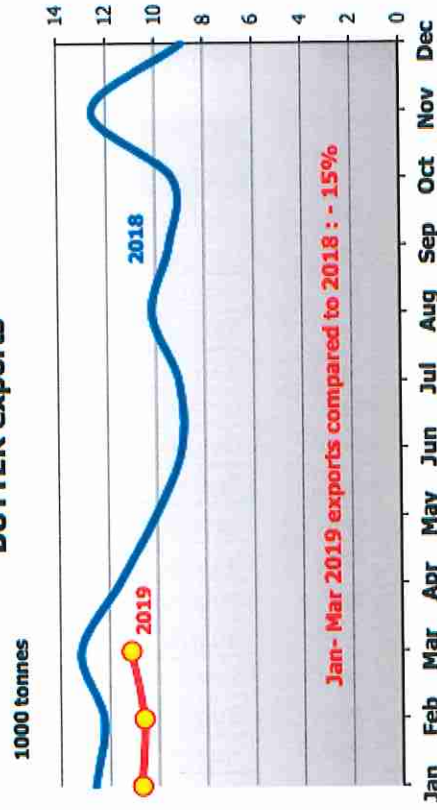


EU Dairy Trade with Third countries

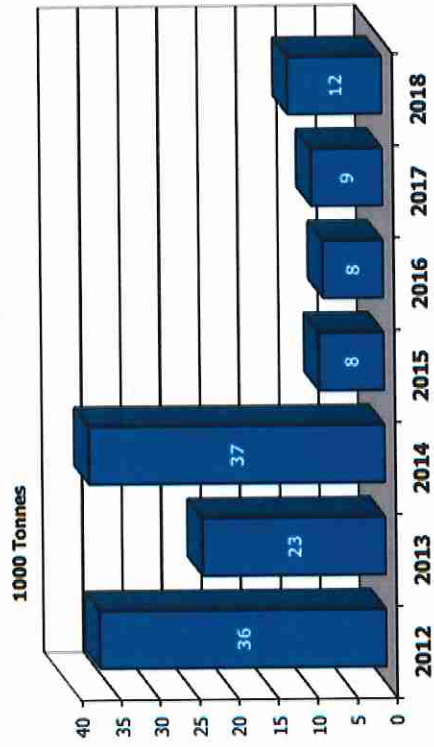
BUTTER exports



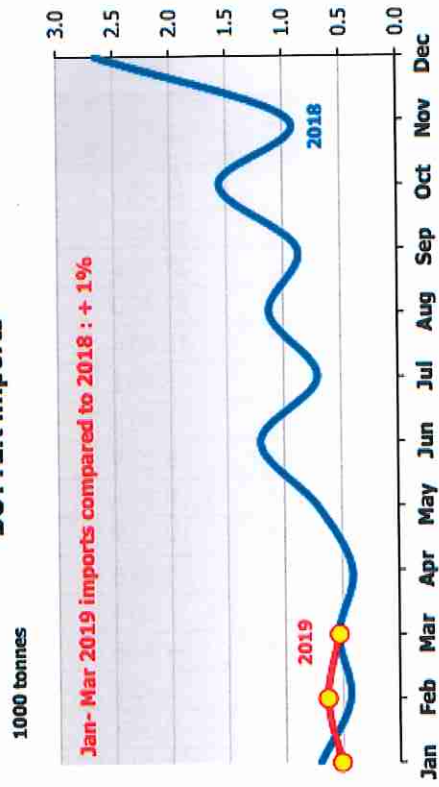
BUTTER exports



BUTTER imports



BUTTER imports



Source : Eurostat (COMEXT) - Based on Export flow

Monthly Intra-Trade (Jan-Feb)

EU Intra EXPORTS of BUTTER

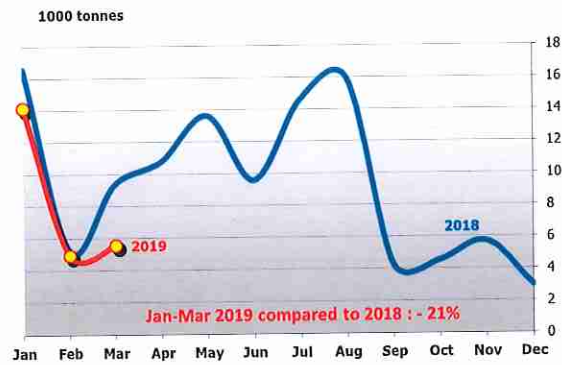
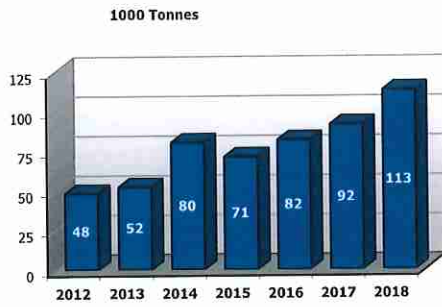
Exporting MS	Quantity in Tonnes			
	Jan-Feb 2017	Jan-Feb 2018	Jan-Feb 2019	
Netherlands	29 136	30 681	31 602	↑ + 3%
Ireland	12 840	14 875	20 129	↑ + 35%
Belgium	12 445	16 504	19 328	↑ + 17%
Germany	18 514	21 239	18 491	↓ - 13%
United Kingdom	3 401	4 378	9 195	↑ + 110%
Poland	8 196	13 010	8 772	↓ - 33%
France	5 350	6 204	7 079	↑ + 14%
Denmark	2 854	4 236	5 937	↑ + 40%
Finland	4 937	3 905	4 904	↑ + 26%
Spain	1 943	1 589	2 120	↑ + 33%
Portugal	507	1 586	1 495	↓ - 6%
Italy	883	1 025	1 166	↑ + 14%
Austria	589	540	504	↓ - 7%
Lithuania	392	558	393	↓ - 30%
Czech Republic	486	526	391	↓ - 26%
Estonia	55	160	213	↑ + 34%
Slovak Republic	164	258	112	↓ - 57%
Luxembourg	89	76	111	↑ + 46%
Bulgaria	103	99	73	↓ - 27%
Sweden	74	152	31	↓ - 80%
Greece	32	21	30	↑ + 42%
Latvia	215	45	27	↓ - 41%
Hungary	23	22	23	↑ + 5%
Croatia	8	14	23	↑ + 60%
Romania	8	7	7	↑ + 11%
Slovenia	1	1	6	↑ +++
Grand Total	103 242	121 712	132 162	↑ + 9%

EU Intra IMPORTS of BUTTER

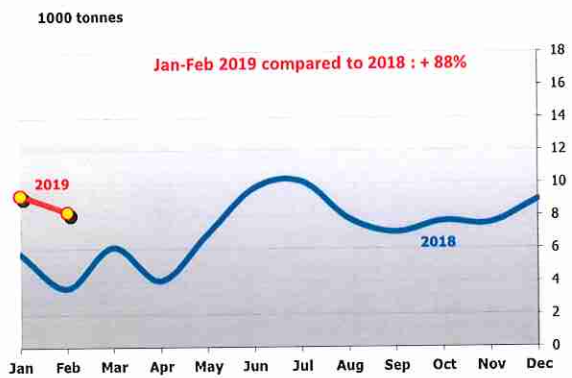
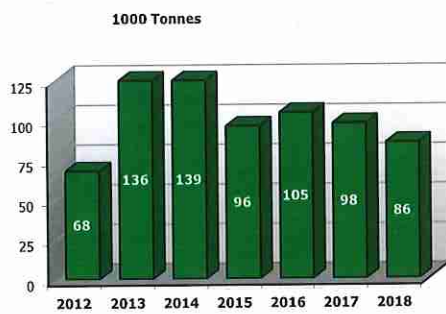
Importing MS	Quantity in Tonnes			
	Jan-Feb 2017	Jan-Feb 2018	Jan-Feb 2019	
France	24 060	28 674	30 093	↑ + 5%
Netherlands	14 552	22 980	26 427	↑ + 15%
Germany	18 371	17 380	20 994	↑ + 21%
Belgium	10 869	14 258	13 595	↓ - 5%
United Kingdom	10 432	10 368	11 076	↑ + 7%
Italy	4 848	5 323	4 947	↓ - 7%
Spain	2 198	3 010	3 496	↑ + 16%
Poland	1 853	2 245	3 451	↑ + 54%
Czech Republic	2 276	2 949	3 188	↑ + 8%
Romania	1 509	1 438	1 871	↑ + 30%
Austria	1 154	1 892	1 838	↓ - 3%
Slovak Republic	2 026	1 269	1 631	↑ + 29%
Sweden	1 385	1 555	1 458	↓ - 6%
Ireland	779	690	1 208	↑ + 75%
Hungary	956	845	948	↑ + 12%
Greece	1 005	1 258	900	↓ - 28%
Lithuania	296	478	846	↑ + 77%
Bulgaria	892	814	797	↓ - 2%
Denmark	1 517	1 375	759	↓ - 45%
Portugal	420	400	618	↑ + 55%
Latvia	314	327	494	↑ + 51%
Croatia	248	304	345	↑ + 14%
Cyprus	184	1 022	261	↓ - 74%
Estonia	254	166	257	↑ + 55%
Slovenia	239	208	254	↑ + 22%
Luxembourg	516	351	236	↓ - 33%
Malta	56	87	126	↑ + 45%
Finland	32	42	49	↑ + 18%
N.det.Intra	3	7	0	↓ - 95%
Grand Total	103 242	121 712	132 162	↑ + 9%

Main IMPORTERS of BUTTER and BUTTEROIL

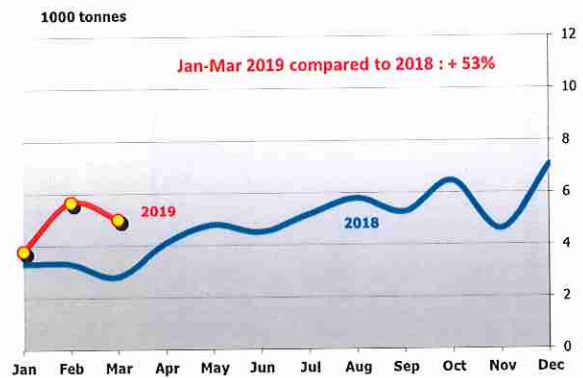
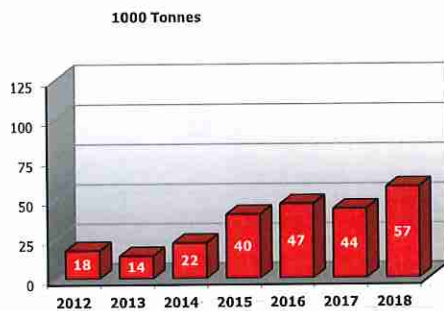
China



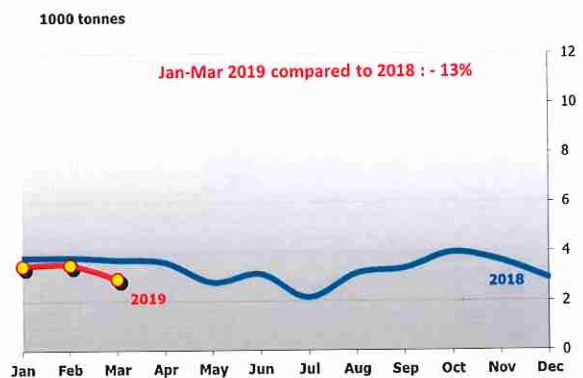
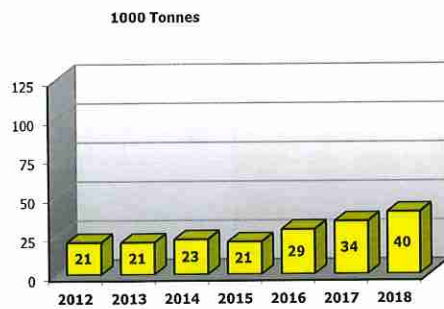
Russia



United States



Australia

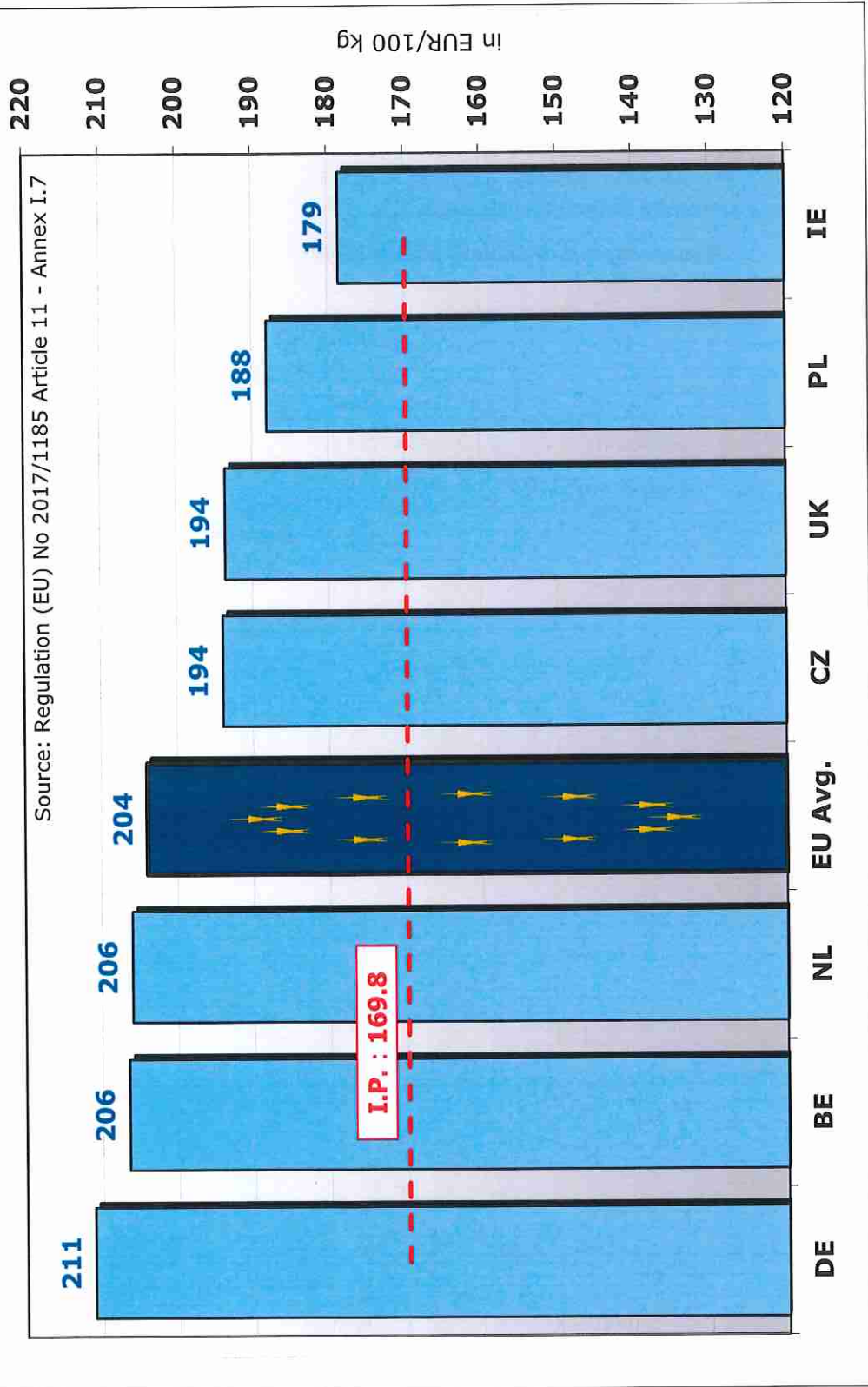




MARKET INFORMATION

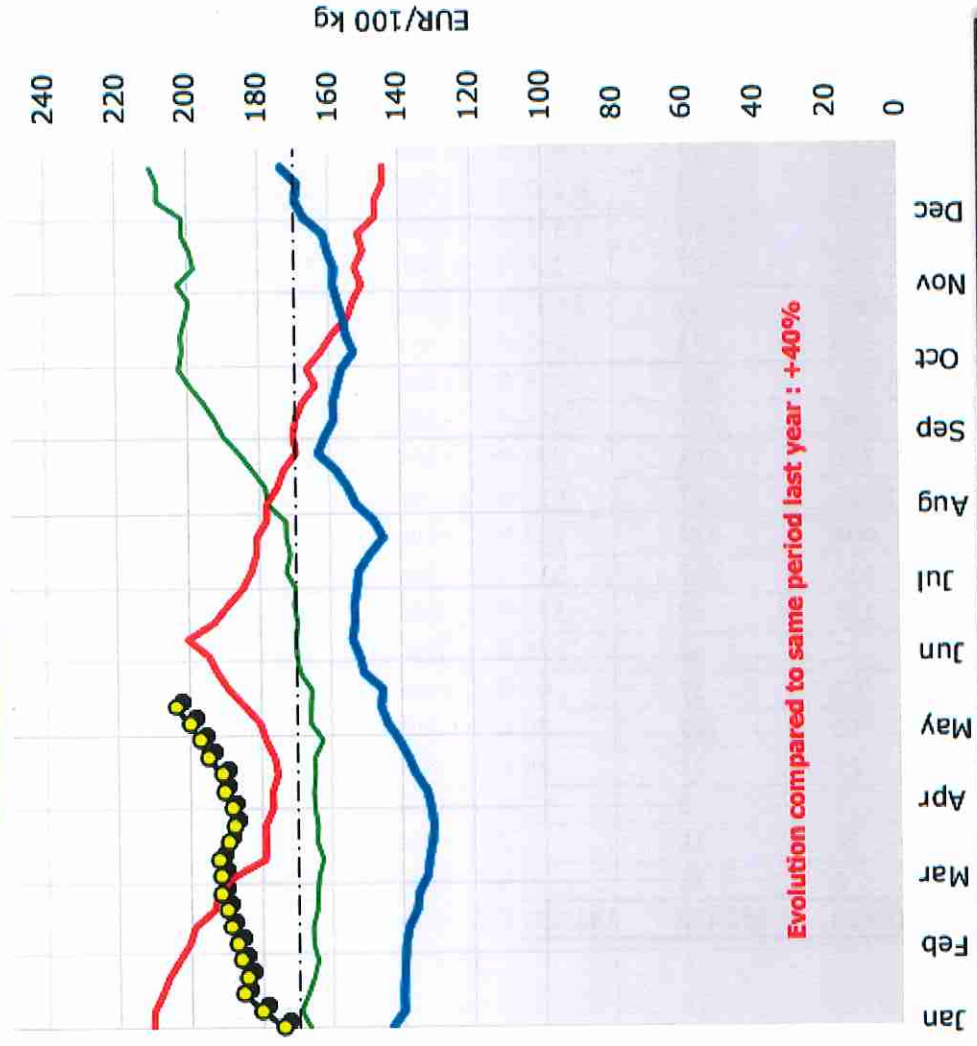
Focus on SMP

EU S.M.P. Prices (up to 19.05.2019)



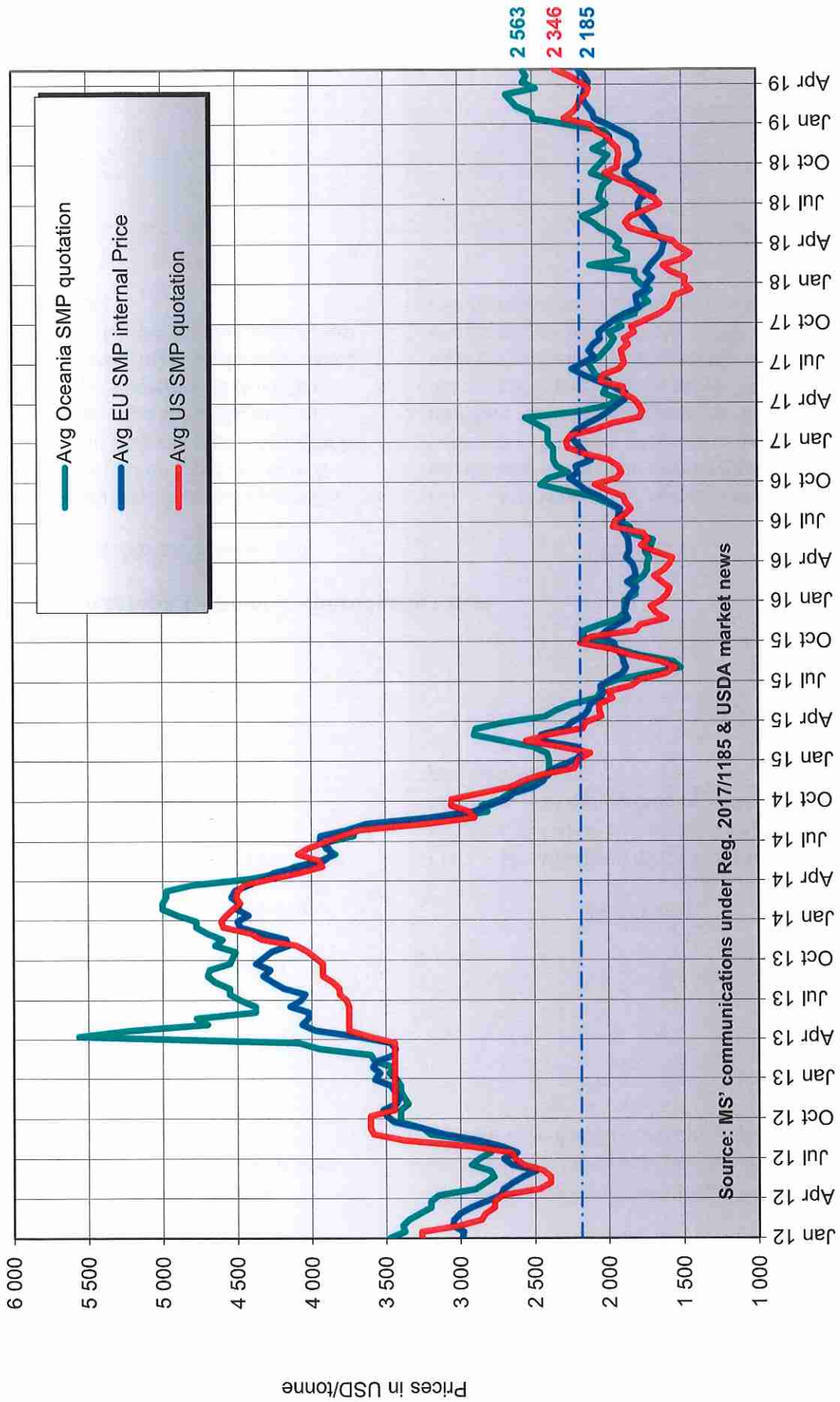
Weekly EU SMP Prices

Latest price : 204 EUR/100kg

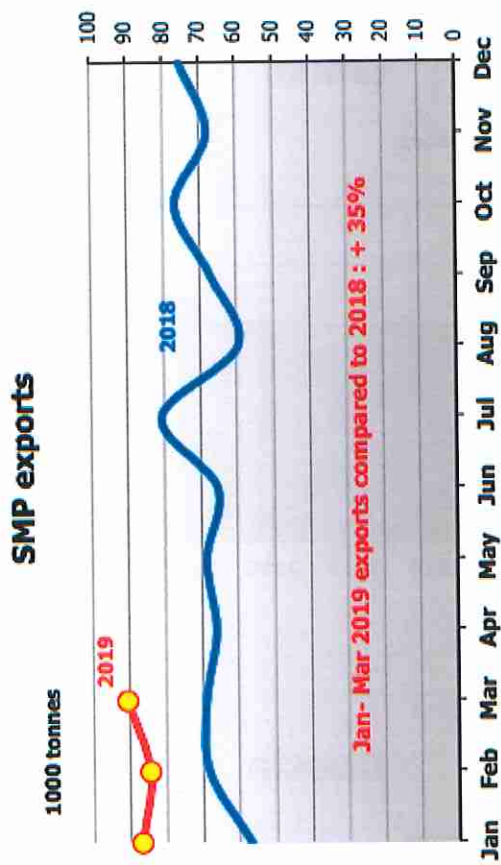
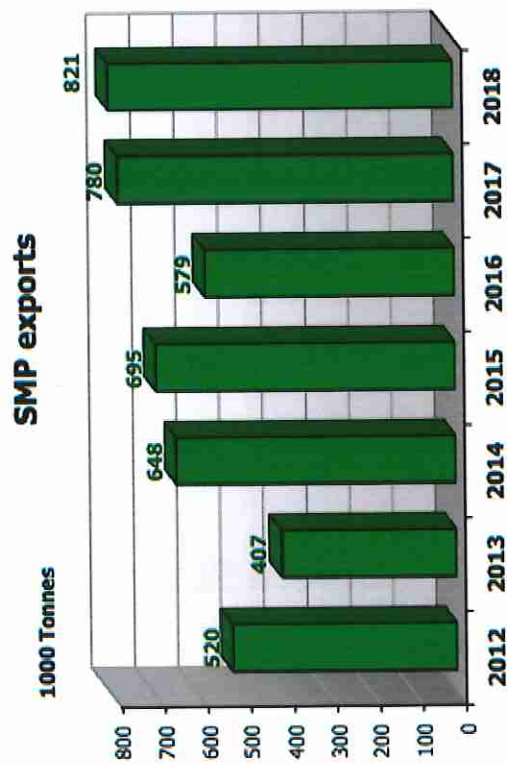


EU Commission - 2019

EU/US/Oceania Quotations of SMP

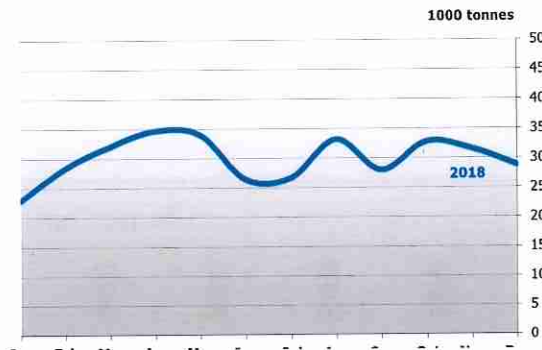
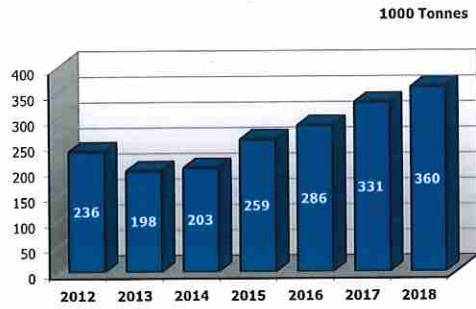


EU Dairy Trade with Third countries

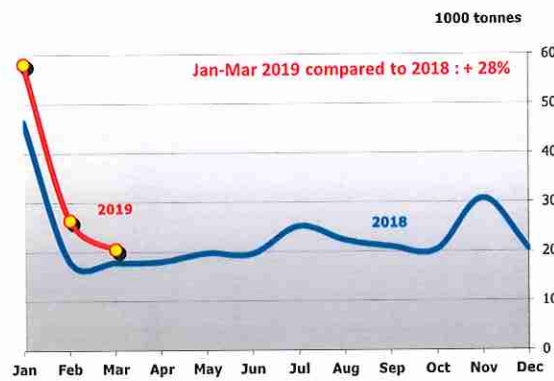
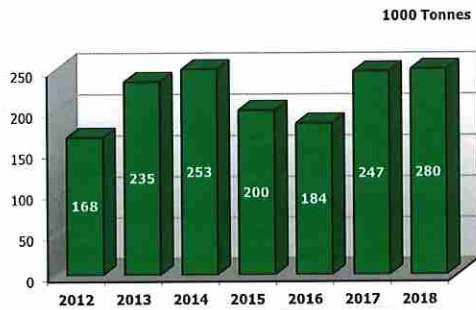


Main IMPORTERS of S.M.P.

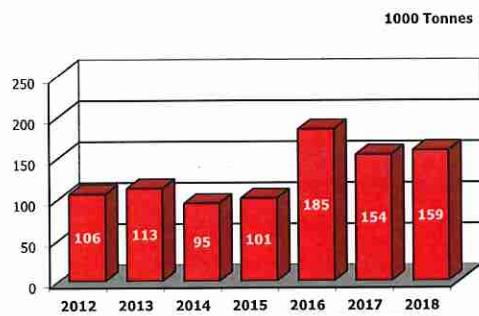
Mexico



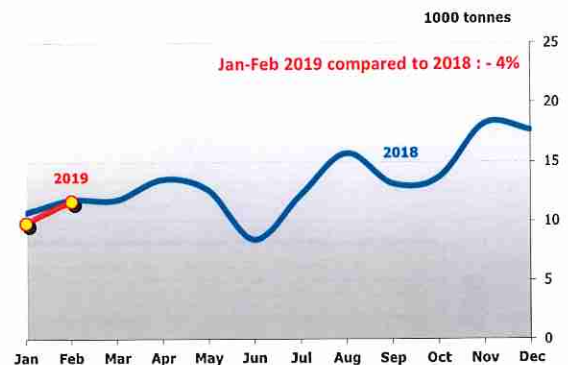
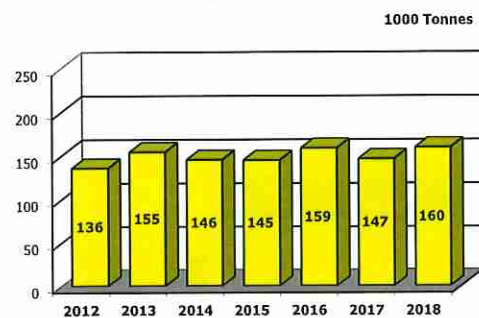
China



Philippines



Indonesia



Monthly Intra-Trade (Jan-Feb)

EU Intra EXPORTS of SMP

Exporting MS	Quantity in Tonnes			
	Jan-Feb 2017	Jan-Feb 2018	Jan-Feb 2019	
Germany	39 184	43 508	42 494	👇 -2%
France	10 392	15 390	19 146	👆 +24%
Belgium	11 659	10 394	17 699	👆 +70%
Netherlands	10 838	3 704	12 351	👆 +++
Ireland	4 633	6 899	10 948	👆 +59%
Lithuania	684	544	8 322	👆 +++
Poland	5 667	3 847	6 608	👆 +72%
United Kingdom	4 380	5 499	6 163	👆 +12%
Sweden	4 752	4 149	4 578	👆 +10%
Portugal	3 314	1 327	3 180	👆 +140%
Finland	2 086	1 955	2 597	👆 +33%
Spain	328	373	1 742	👆 +++
Denmark	1 241	989	1 483	👆 +50%
Italy	690	867	1 316	👆 +52%
Latvia	708	683	971	👆 +42%
Czech Republic	1 515	887	811	👇 -9%
Austria	404	634	766	👆 +21%
Estonia	130	417	317	👇 -24%
Slovak Republic	128	60	176	👆 +193%
Greece	27	46	126	👆 +175%
Slovenia	21	32	41	👆 +28%
Bulgaria	66	102	29	👇 -71%
Romania	23	72	26	👇 -65%
Croatia	1	9	2	👇 -75%
Hungary	27	19	1	👇 -97%
Luxembourg	0	25	0	👇 -100%
Grand Total	102 898	102 432	141 893	👆 +39%

EU Intra IMPORTS of SMP

Importing MS	Quantity in Tonnes			
	Jan-Feb 2017	Jan-Feb 2018	Jan-Feb 2019	
Netherlands	34 532	33 489	55 088	👆 +64%
Italy	10 694	11 844	15 368	👆 +30%
Germany	7 434	4 932	11 303	👆 +129%
Spain	6 645	7 202	10 602	👆 +47%
Belgium	9 966	8 736	10 280	👆 +18%
Poland	4 869	7 080	8 695	👆 +23%
France	5 403	6 012	7 479	👆 +24%
Ireland	5 813	4 051	4 993	👆 +23%
United Kingdom	5 376	4 917	3 569	👇 -27%
Bulgaria	1 918	2 691	2 300	👇 -15%
Austria	2 090	2 028	1 981	👇 -2%
Denmark	1 142	1 489	1 799	👆 +21%
Greece	818	815	1 308	👆 +61%
Romania	1 135	1 408	1 053	👇 -25%
Czech Republic	225	457	1 010	👆 +121%
Portugal	859	671	937	👆 +40%
Slovak Republic	873	766	921	👆 +20%
Sweden	1 138	1 376	881	👇 -36%
Hungary	525	438	627	👆 +43%
Croatia	311	378	499	👆 +32%
Slovenia	208	238	349	👆 +46%
Estonia	152	52	288	👆 +++
Lithuania	209	367	202	👇 -45%
Latvia	376	82	143	👆 +74%
Cyprus	54	108	99	👇 -8%
Malta	12	110	53	👇 -52%
Luxembourg	73	639	43	👇 -93%
Finland	49	54	24	👇 -56%
N.det.Intra	0		0	
Grand Total	102 898	102 432	141 893	👆 +39%

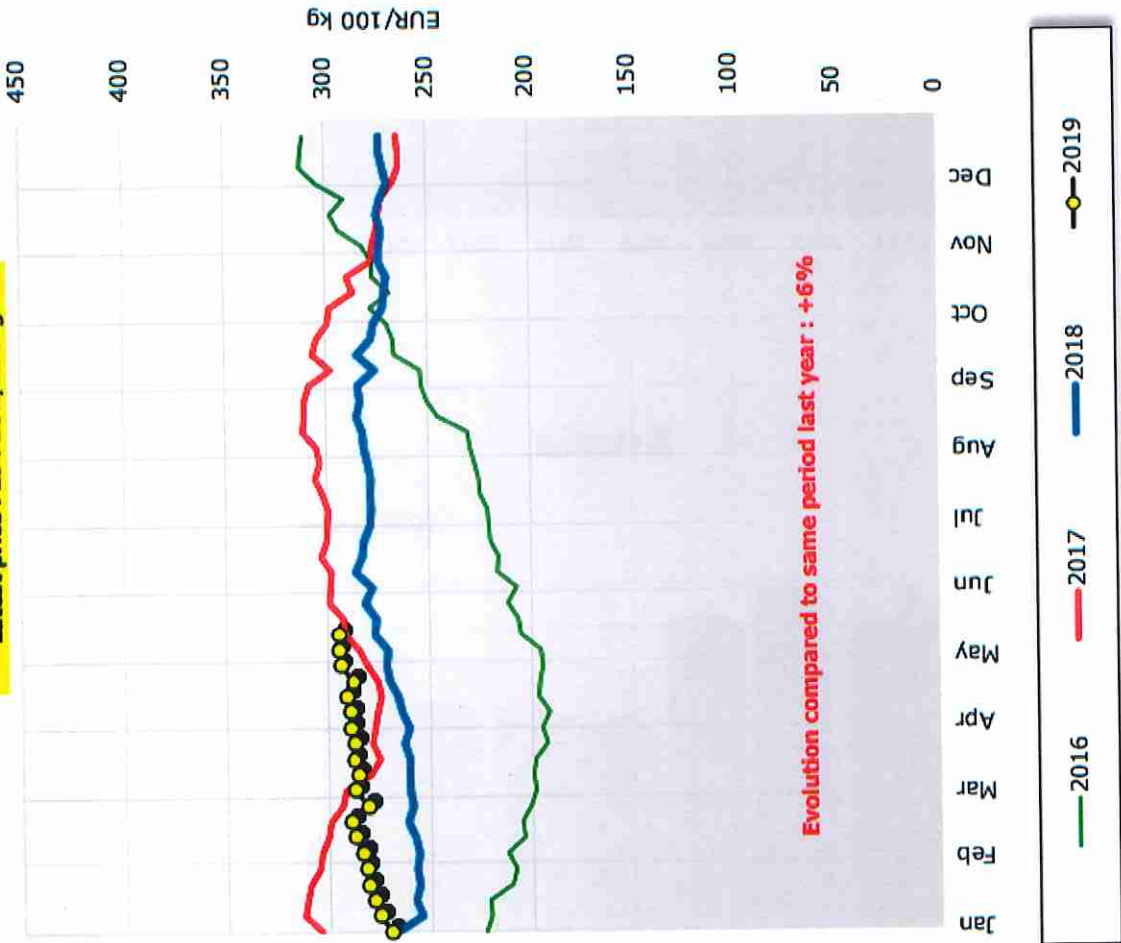


MARKET INFORMATION

Focus on WMP

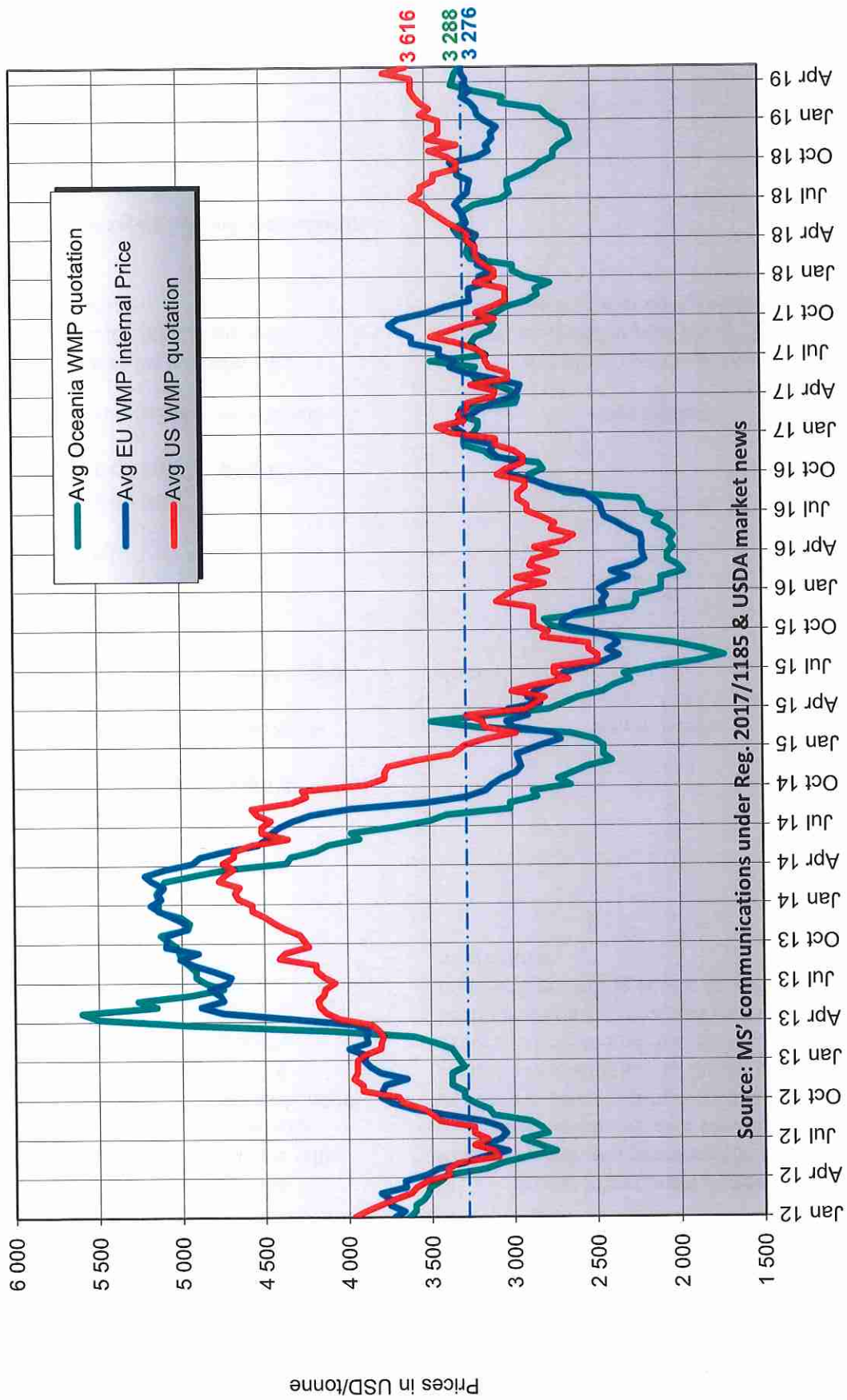
Weekly EU WMP Prices

Latest price : 294 EUR/100kg



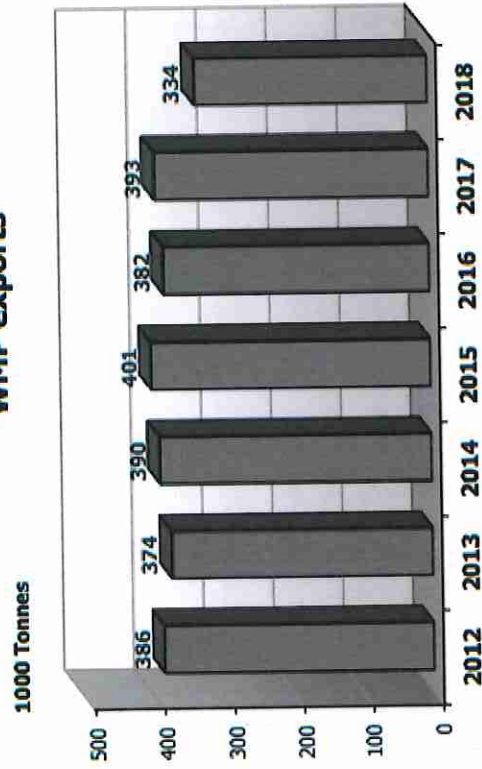
EU Commission - 2019

EU/US/Oceania Quotations of WMP

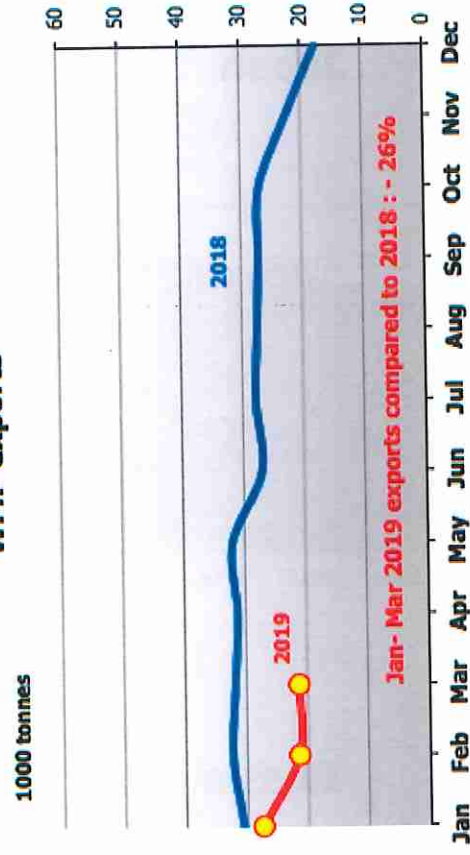


EU Dairy Trade with Third countries

WMP exports

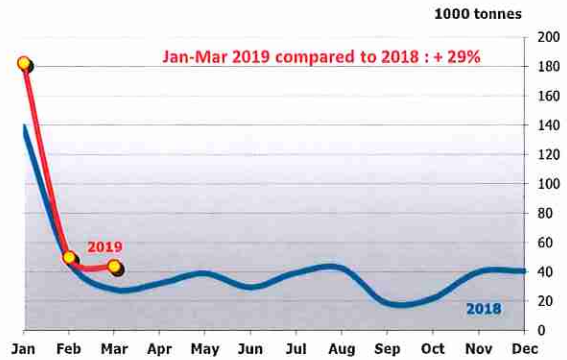
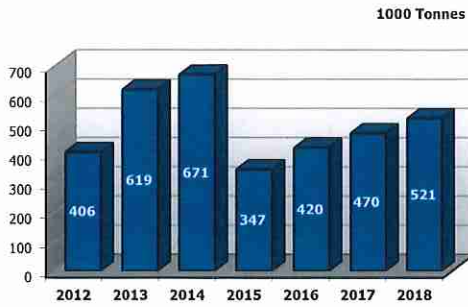


WMP exports

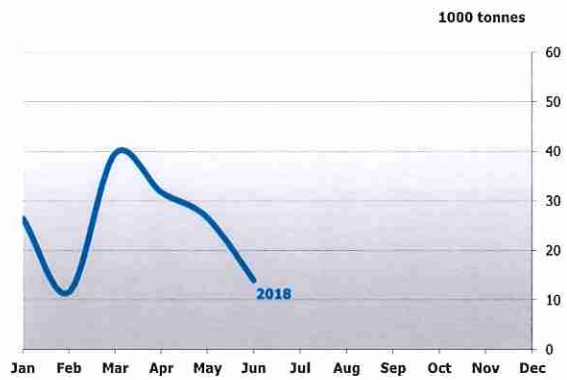
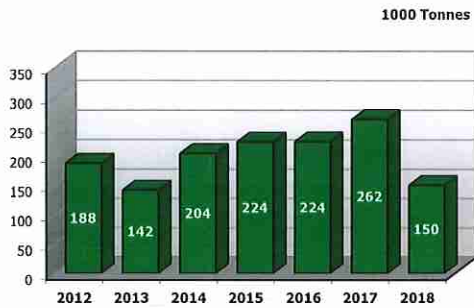


Main IMPORTERS of W.M.P.

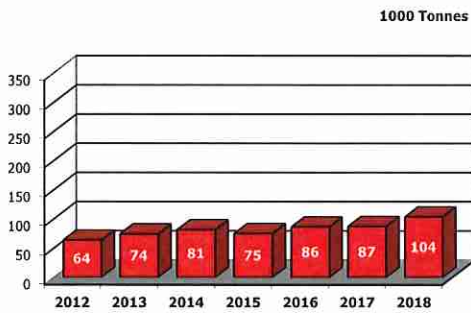
China



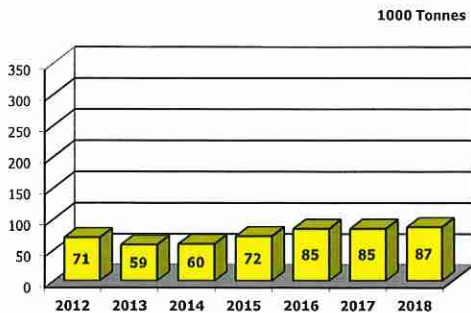
Algeria



Hong Kong



Sri Lanka



Monthly Intra-Trade (Jan-Feb)

EU Intra EXPORTS of WMP

Exporting MS	Quantity in Tonnes				
	Jan-Feb 2017	Jan-Feb 2018	Jan-Feb 2019		
Germany	7 093	6 673	9 305 ↑	+ 39%	
United Kingdom	4 552	3 575	8 648 ↑	+ 142%	
Netherlands	8 071	8 090	8 347 →	+ 3%	
Belgium	3 328	6 849	7 400 ↑	+ 8%	
France	7 622	8 244	7 249 ↓	- 12%	
Ireland	3 415	2 860	7 127 ↑	+ 149%	
Poland	1 438	1 057	3 343 ↑	+++	
Czech Republic	1 103	896	901 →	+ 1%	
Denmark	261	562	898 ↑	+ 60%	
Spain	1 174	436	788 ↑	+ 81%	
Austria	836	568	376 ↓	- 34%	
Portugal	796	700	215 ↓	- 69%	
Sweden	281	152	212 ↑	+ 40%	
Italy	124	225	162 ↓	- 28%	
Finland	137	46	142 ↑	+++	
Lithuania	7	38	88 ↑	+ 134%	
Romania	1	51	30 ↓	- 41%	
Latvia	14	28	21 ↓	- 27%	
Bulgaria	94	68	18 ↓	- 73%	
Luxembourg	28	36	18 ↓	- 51%	
Croatia	25	17	16 ↓	- 6%	
Slovak Republic	75	49	11 ↓	- 78%	
Slovenia	1	4	10 ↑	+ 170%	
Greece	4	1	8 ↑	+++	
Hungary	2	2	4 ↑	+ 91%	
Estonia	0	10	1 ↓	- 94%	
Grand Total	40 483	41 233	55 337 ↑	+ 34%	

EU Intra IMPORTS of WMP

Importing MS	Quantity in Tonnes				
	Jan-Feb 2017	Jan-Feb 2018	Jan-Feb 2019		
Netherlands	6 982	7 552	16 092 ↑	+ 113%	
Germany	7 288	5 290	8 045 ↑	+ 52%	
Belgium	4 322	4 606	5 597 ↑	+ 22%	
Italy	4 376	4 825	5 231 ↑	+ 8%	
United Kingdom	4 114	5 681	4 540 ↓	- 20%	
France	3 384	2 818	4 512 ↑	+ 60%	
Ireland	2 854	1 617	2 399 ↑	+ 48%	
Poland	1 325	1 524	2 014 ↑	+ 32%	
Spain	2 133	2 570	2 006 ↓	- 22%	
Austria	455	634	905 ↑	+ 43%	
Greece	556	735	584 ↓	- 21%	
Czech Republic	243	246	428 ↑	+ 74%	
Denmark	139	328	417 ↑	+ 27%	
Sweden	548	525	415 ↓	- 21%	
Slovak Republic	379	327	365 ↑	+ 12%	
Portugal	102	230	284 ↑	+ 23%	
N.det.Intra	6	345	230 ↓	- 33%	
Hungary	219	232	207 ↓	- 11%	
Croatia	218	170	205 ↑	+ 20%	
Bulgaria	239	202	192 →	- 5%	
Estonia	143	175	191 ↑	+ 9%	
Romania	253	333	177 ↓	- 47%	
Slovenia	36	106	149 ↑	+ 40%	
Lithuania	31	46	70 ↑	+ 52%	
Malta	99	6	50 ↑	+++	
Luxembourg	14	65	10 ↓	- 84%	
Cyprus	10	18	10 ↓	- 43%	
Finland	3	3	7 ↑	+ 141%	
Latvia	12	23	5 ↓	- 78%	
Grand Total	40 483	41 233	55 337 ↑	+ 34%	

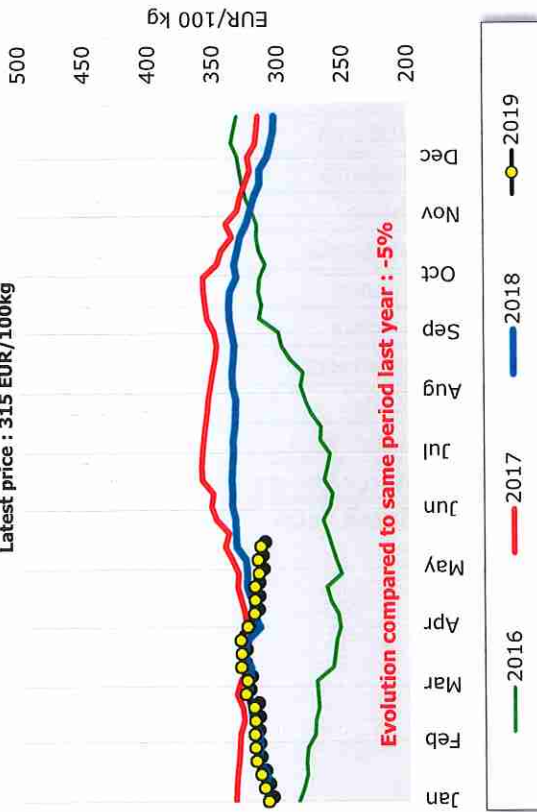


MARKET INFORMATION

Focus on Cheese

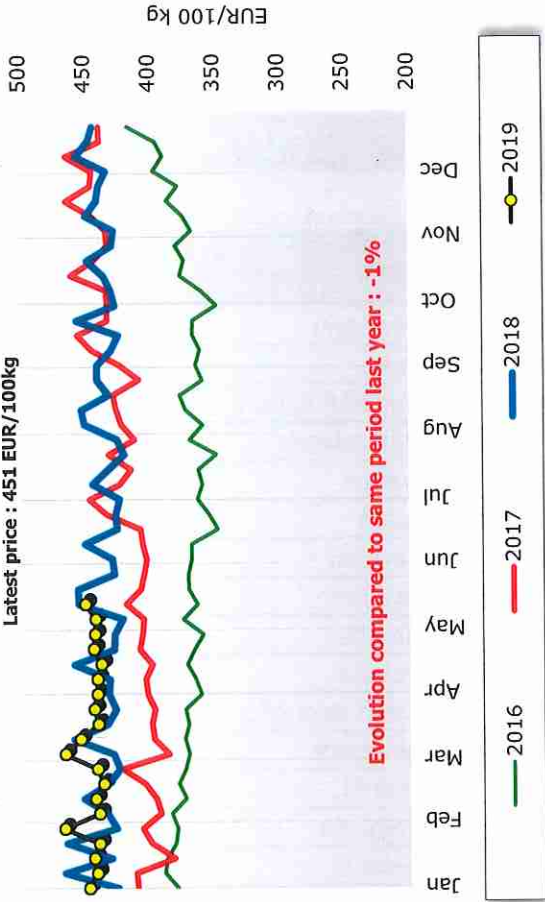
Weekly EU CHEDDAR Prices

Latest price : 315 EUR/100kg



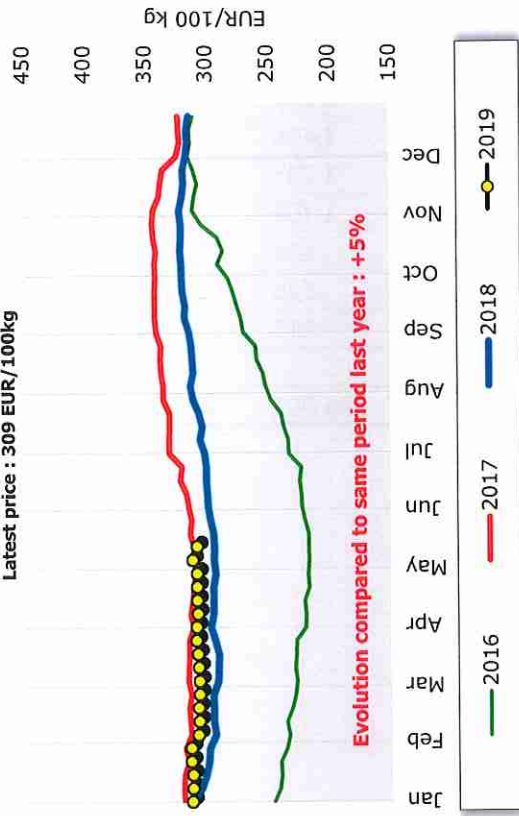
Weekly EU EMENTAL Prices

Latest price : 451 EUR/100kg



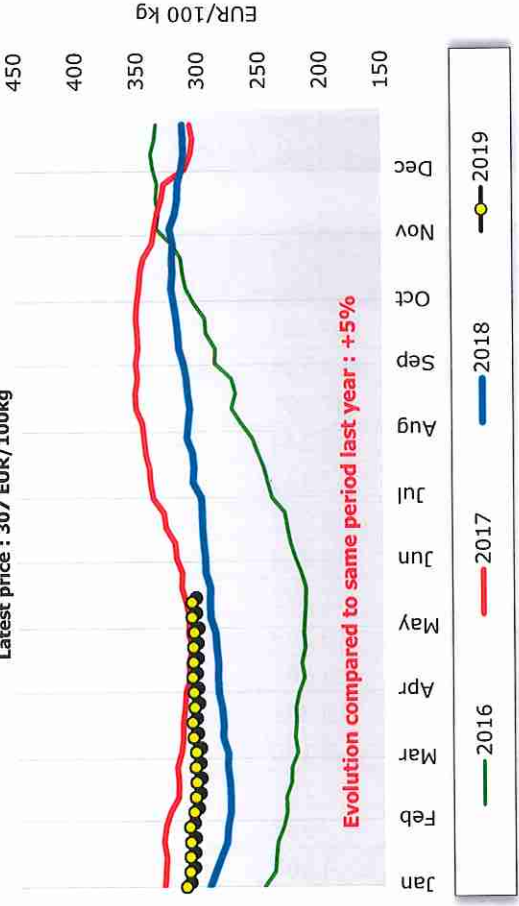
Weekly EU GOUDA Prices

Latest price : 309 EUR/100kg

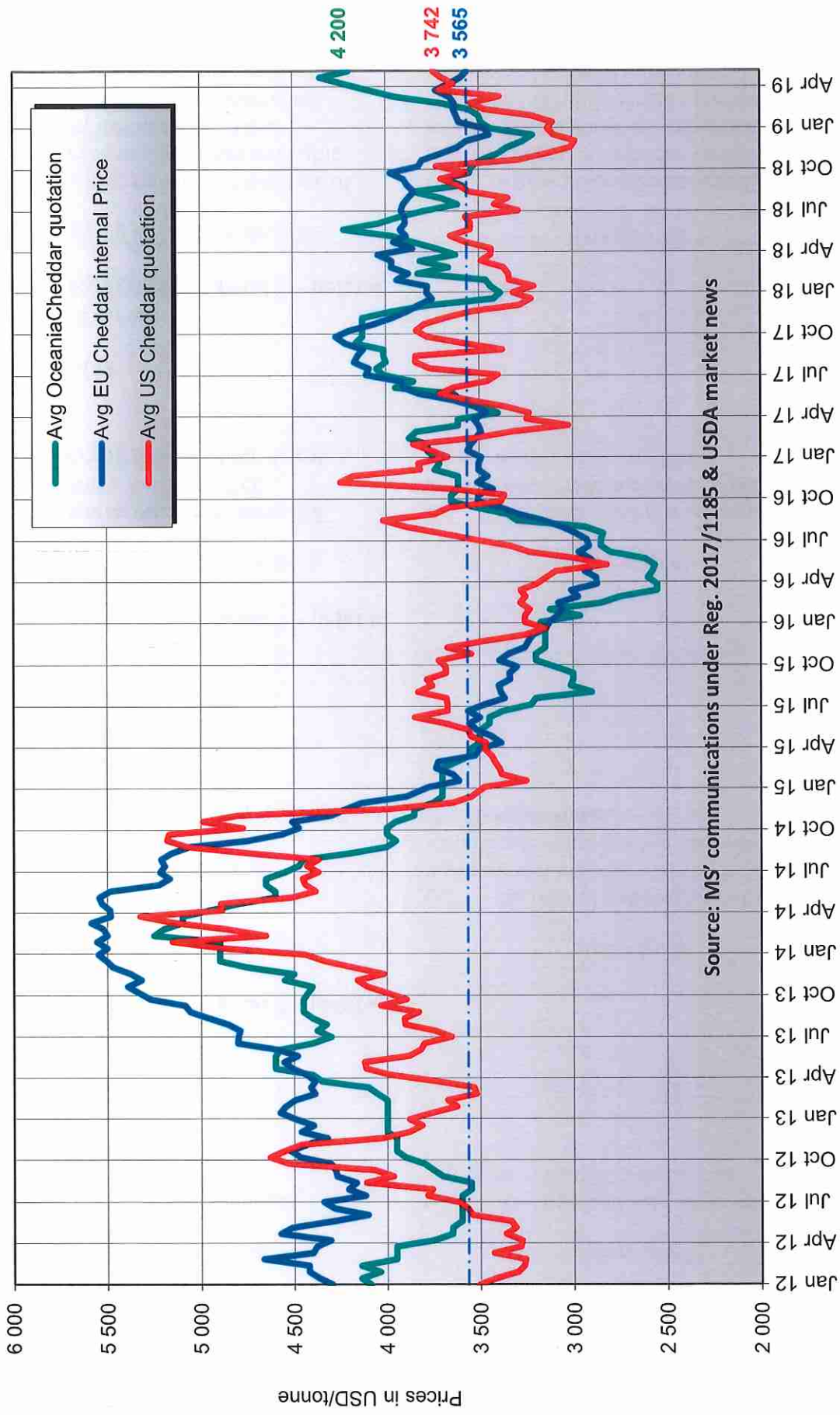


Weekly EU EDAM Prices

Latest price : 307 EUR/100kg

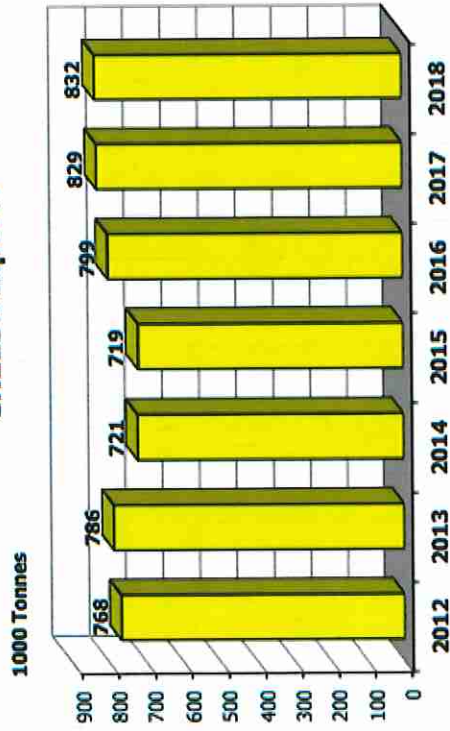


EU/US/Oceania Quotations of Cheddar

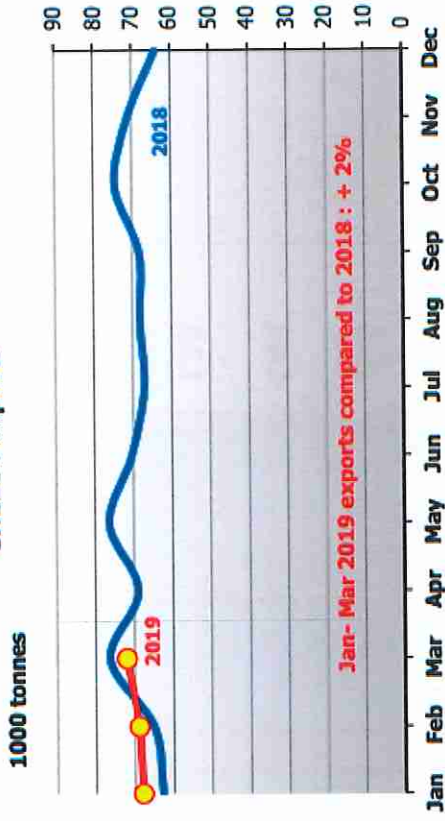


EU Dairy Trade with Third countries

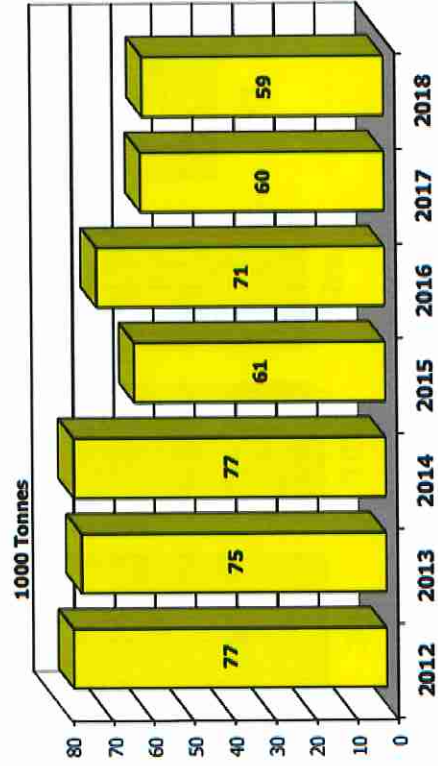
CHEESE exports



CHEESE exports



CHEESE imports



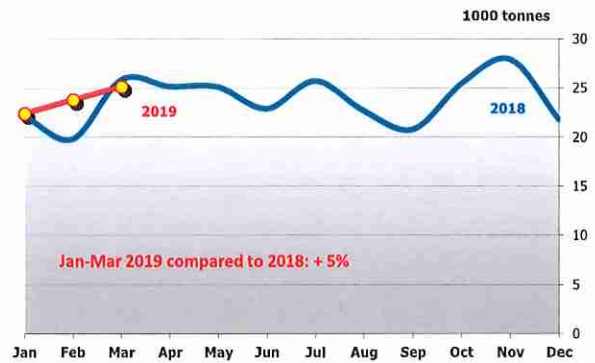
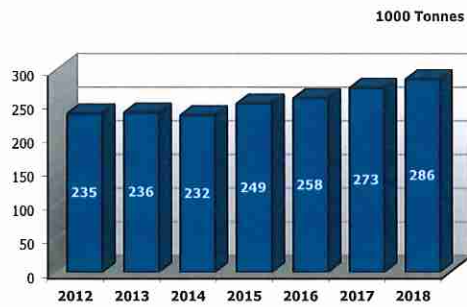
CHEESE imports



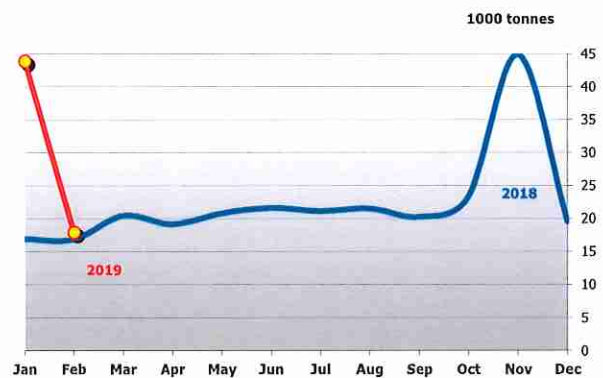
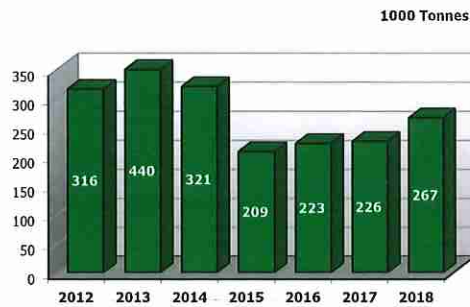
EU Commission - 2019

Main IMPORTERS of CHEESE

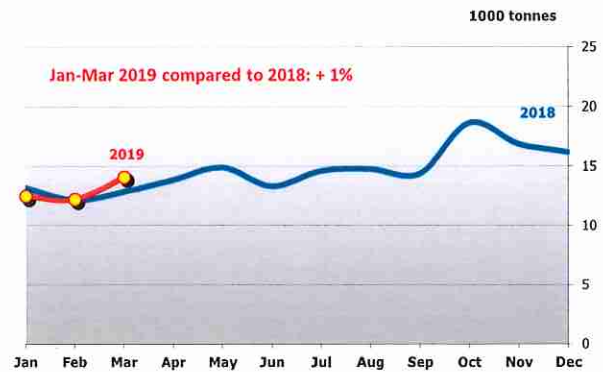
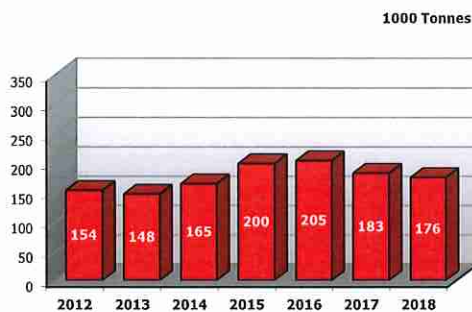
Japan



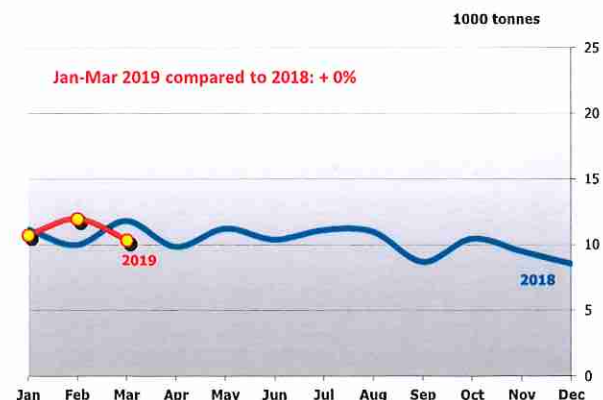
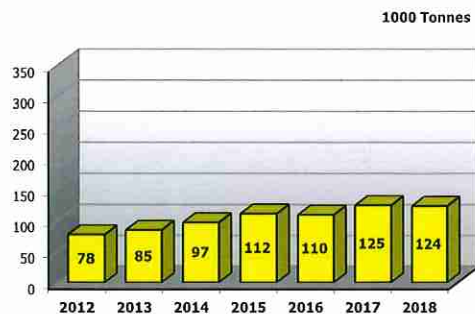
Russia



United States



South Korea



Monthly Intra-Trade (Jan-Feb)

EU Intra EXPORTS of CHEESES

Quantity in Tonnes

Exporting MS	Jan-Feb 2017	Jan-Feb 2018	Jan-Feb 2019	
Germany	167 408	177 328	176 685	↔ - 0%
Netherlands	118 708	123 708	126 538	↗ + 2%
France	87 191	87 078	89 722	↗ + 3%
Denmark	45 343	50 527	51 576	↗ + 2%
Italy	41 395	44 399	49 214	↗ + 11%
Belgium	33 033	35 023	39 405	↗ + 13%
Poland	28 764	32 030	32 230	↗ + 1%
Ireland	21 285	20 166	30 726	↗ + 52%
United Kingdom	19 169	25 385	29 208	↗ + 15%
Austria	18 664	21 151	21 632	↗ + 2%
Spain	10 861	12 647	12 956	↗ + 2%
Greece	8 180	8 766	10 209	↗ + 16%
Czech Republic	7 732	8 417	8 514	↗ + 1%
Lithuania	7 538	5 959	6 253	↗ + 5%
Slovak Republic	4 608	6 511	5 827	↘ - 11%
Luxembourg	5 279	6 546	5 467	↘ - 16%
Cyprus	3 036	3 593	4 940	↗ + 38%
Latvia	2 382	3 306	3 604	↗ + 9%
Estonia	2 702	2 497	3 184	↗ + 28%
Hungary	2 574	2 719	3 152	↗ + 16%
Sweden	2 860	2 787	2 990	↗ + 7%
Bulgaria	2 410	2 544	2 208	↘ - 13%
Finland	1 283	1 626	2 045	↗ + 26%
Romania	1 700	1 427	1 609	↗ + 13%
Slovenia	698	1 046	941	↘ - 10%
Croatia	586	900	832	↘ - 8%
Portugal	615	770	732	↘ - 5%
Malta		0		↘ - 100%
Grand Total	646 001	688 854	722 396	↗ + 5%

EU Intra IMPORTS of CHEESES

Quantity in Tonnes

Importing MS	Jan-Feb 2017	Jan-Feb 2018	Jan-Feb 2019	
Germany	124 746	130 987	133 110	↗ + 2%
Italy	75 313	78 215	83 702	↗ + 7%
United Kingdom	70 371	69 258	80 989	↗ + 17%
Netherlands	53 587	59 125	62 635	↗ + 6%
France	49 676	55 424	56 832	↗ + 3%
Spain	42 431	45 561	49 230	↗ + 8%
Belgium	46 149	47 060	49 127	↗ + 4%
Sweden	19 825	22 020	21 338	↘ - 3%
Greece	17 868	19 882	20 089	↗ + 1%
Austria	17 849	18 205	18 997	↗ + 4%
Czech Republic	14 165	16 562	17 425	↗ + 5%
Denmark	15 423	16 849	16 954	↗ + 1%
Poland	13 800	14 952	16 566	↗ + 11%
Romania	11 676	11 553	12 634	↗ + 9%
Finland	12 179	11 743	12 194	↗ + 4%
Ireland	9 553	11 183	11 151	↔ - 0%
Hungary	9 460	11 188	10 665	↘ - 5%
Portugal	6 979	8 095	8 773	↗ + 8%
Slovak Republic	7 690	8 448	8 310	↘ - 2%
Luxembourg	6 557	9 941	7 545	↘ - 24%
Croatia	2 971	4 295	4 706	↗ + 10%
Slovenia	3 400	3 921	4 052	↗ + 3%
Bulgaria	2 908	3 739	3 582	↘ - 4%
Latvia	3 168	2 276	2 782	↗ + 22%
Lithuania	2 103	2 719	2 548	↘ - 6%
Cyprus	2 095	1 664	2 539	↗ + 53%
Estonia	2 092	1 256	1 474	↗ + 17%
Secr.Intra	1 039	1 612	1 298	↘ - 19%
Malta	919	1 087	1 145	↗ + 5%
N.det.Intra	14	33	7	↘ - 79%
Stores and provisions intra		3	0	↘ - 85%
Grand Total	646 001	688 854	722 396	



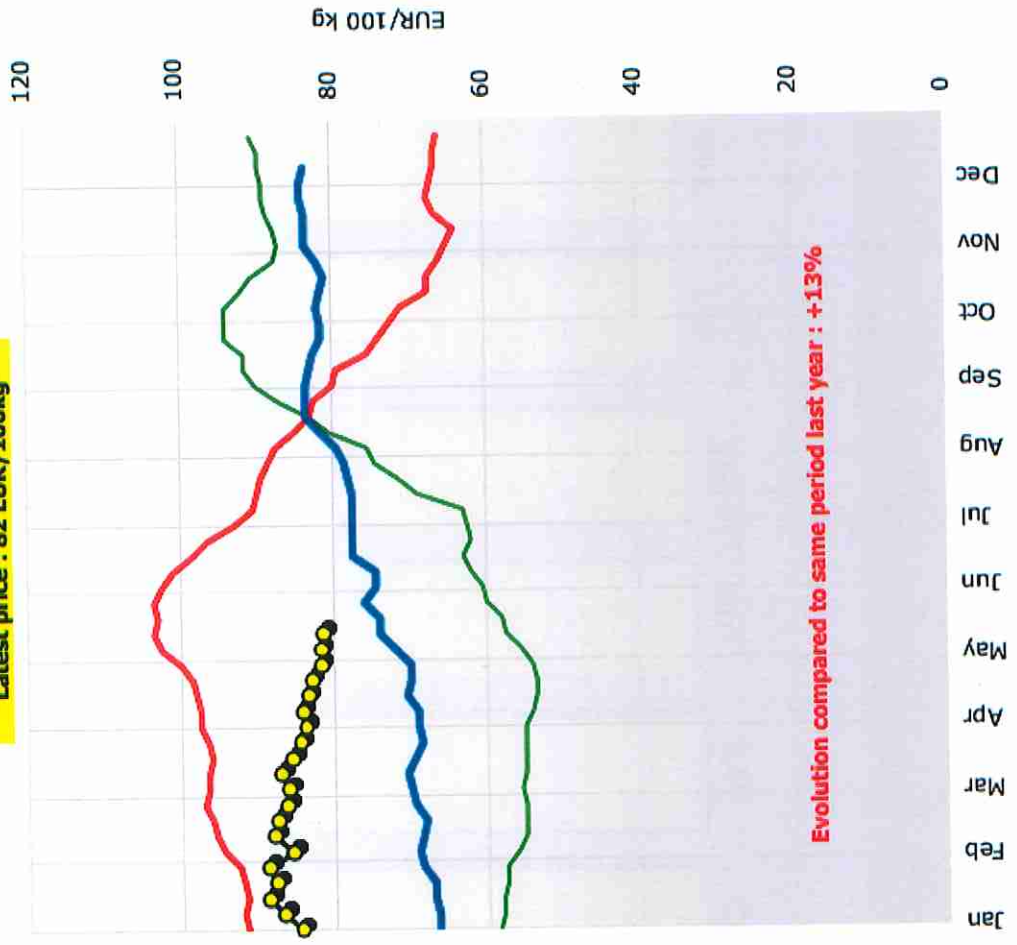
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MARKET INFORMATION

Focus on Whey powder

Weekly EU WheyPowder Prices

Latest price : 82 EUR/100kg



EU Commission - 2019

Monthly Intra-Trade (Jan-Feb)

EU Intra EXPORTS of WHEYPOWDER

Exporting MS	Quantity in Tonnes			
	Jan-Feb 2017	Jan-Feb 2018	Jan-Feb 2019	
Germany	41 341	42 956	35 467 ↓	-17%
Italy	18 473	20 609	21 711 ↑	+5%
France	20 443	21 638	18 258 ↓	-16%
Netherlands	16 460	17 470	16 276 ↓	-7%
Poland	13 747	15 036	15 513 ↗	+3%
Ireland	4 513	5 431	8 197 ↑	+51%
Spain	5 322	5 912	6 554 ↑	+11%
Denmark	6 462	5 274	6 540 ↑	+24%
United Kingdom	7 654	5 573	5 901 ↑	+6%
Austria	4 280	4 537	4 213 ↓	-7%
Portugal	2 109	1 849	2 537 ↑	+37%
Greece	160	335	2 050 ↑	+++
Finland	944	1 146	1 061 ↓	-7%
Slovak Republic	1 154	1 423	1 021 ↓	-28%
Belgium	4 394	4 351	917 ↓	-79%
Estonia	852	1 115	903 ↓	-19%
Latvia	1 067	1 297	829 ↓	-36%
Lithuania	1 992	1 339	754 ↓	-44%
Hungary	458	579	666 ↑	+15%
Czech Republic	720	976	494 ↓	-49%
Sweden	224	178	152 ↓	-15%
Croatia	45	137	135 ↘	-1%
Bulgaria	67	27	29 ↑	+6%
Romania	64	11	23 ↑	+99%
Slovenia		0	4 ↑	+++
Luxembourg	0	2	2 ↑	+24%
Grand Total	152 943	159 201	150 205 ↓	-6%

EU Intra IMPORTS of WHEYPOWDER

Importing MS	Quantity in Tonnes			
	Jan-Feb 2017	Jan-Feb 2018	Jan-Feb 2019	
Netherlands	67 446	71 586	60 669 ↓	-15%
Germany	18 591	19 378	17 671 ↓	-9%
France	12 383	11 159	11 819 ↑	+6%
Belgium	9 079	10 496	9 298 ↓	-11%
Italy	7 046	6 570	8 717 ↑	+33%
United Kingdom	6 473	6 568	8 654 ↑	+32%
Denmark	4 569	5 385	5 747 ↑	+7%
Spain	4 686	5 980	4 983 ↓	-17%
Secr.Intra	4 463	3 173	4 083 ↑	+29%
Ireland	4 601	4 543	3 976 ↓	-12%
Poland	3 820	3 953	3 027 ↓	-23%
Austria	756	1 822	2 088 ↑	+15%
Sweden	676	455	1 596 ↑	+++
Bulgaria	1 416	1 569	1 251 ↓	-20%
Hungary	781	986	1 151 ↑	+17%
Estonia	188	652	995 ↑	+53%
Greece	929	740	923 ↑	+25%
Czech Republic	1 426	837	717 ↓	-14%
Portugal	541	869	670 ↓	-23%
Slovak Republic	734	737	586 ↓	-20%
Romania	402	599	491 ↓	-18%
Lithuania	1 390	569	462 ↓	-19%
Croatia	312	264	353 ↑	+34%
Latvia	31	93	115 ↑	+24%
Slovenia	30	78	78 ↗	'
Luxembourg	31	80	41 ↓	-48%
Finland	118	10	17 ↑	+73%
Malta	3	21	16 ↓	-24%
Cyprus	21	31	13 ↓	-58%
N.det.Intra			0	
Grand Total	152 943	159 201	150 205 ↓	-6%



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OTHER STATISTICS

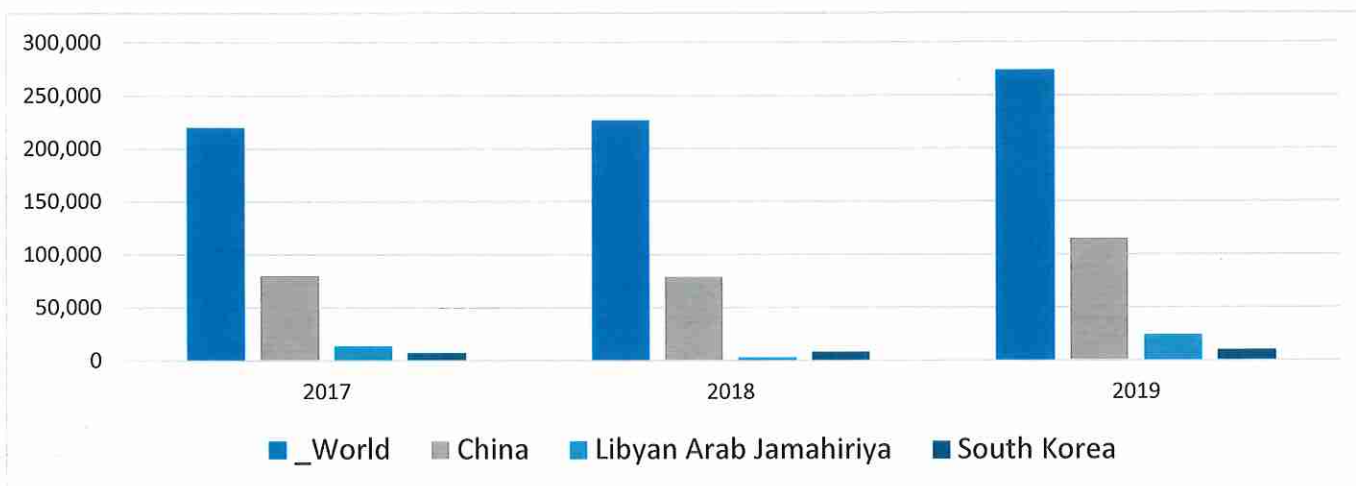
EU28 Exports to _World

(in tonnes)

Commodity: 0401, Milk And Cream, Not Concentrated Nor Containing Added Sweetening

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	219,939	226,891	273,990	100%	100%	100%	21%
China	T	79,656	78,810	114,668	36%	35%	42%	45%
Libyan Arab Jamahiriya	T	13,469	2,975	24,179	6%	1%	9%	713%
South Korea	T	7,159	8,005	10,059	3%	4%	4%	26%



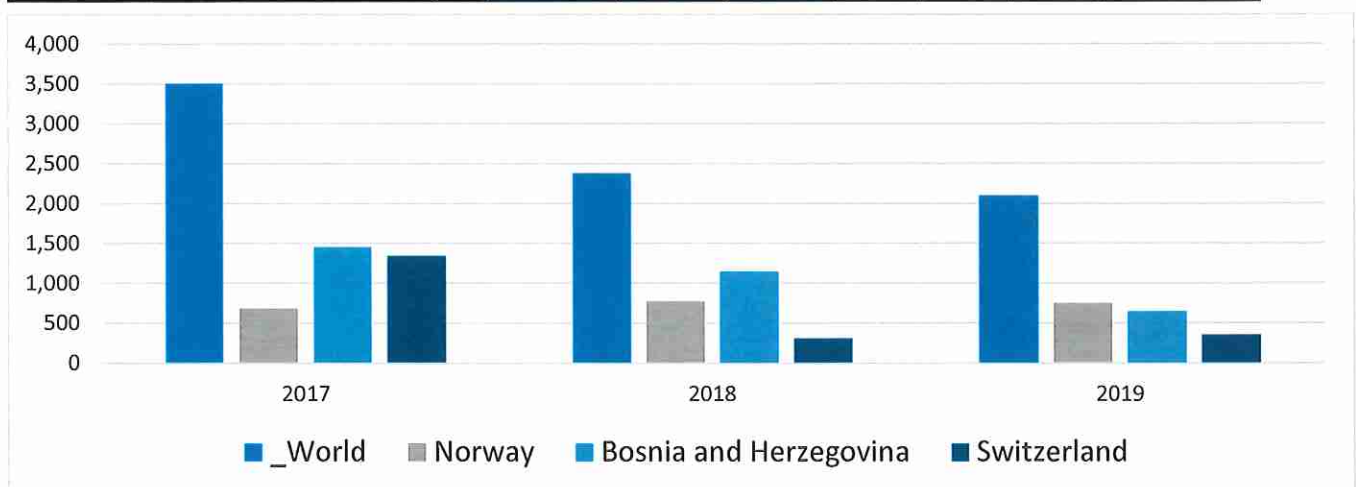
EU28 Imports from _World

(in tonnes)

Commodity: 0401, Milk And Cream, Not Concentrated Nor Containing Added Sweetening

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	3,501	2,380	2,098	100%	100%	100%	-12%
Norway	T	680	772	750	19%	32%	36%	-3%
Bosnia and Herzegovina	T	1,449	1,146	647	41%	48%	31%	-44%
Switzerland	T	1,340	309	354	38%	13%	17%	15%



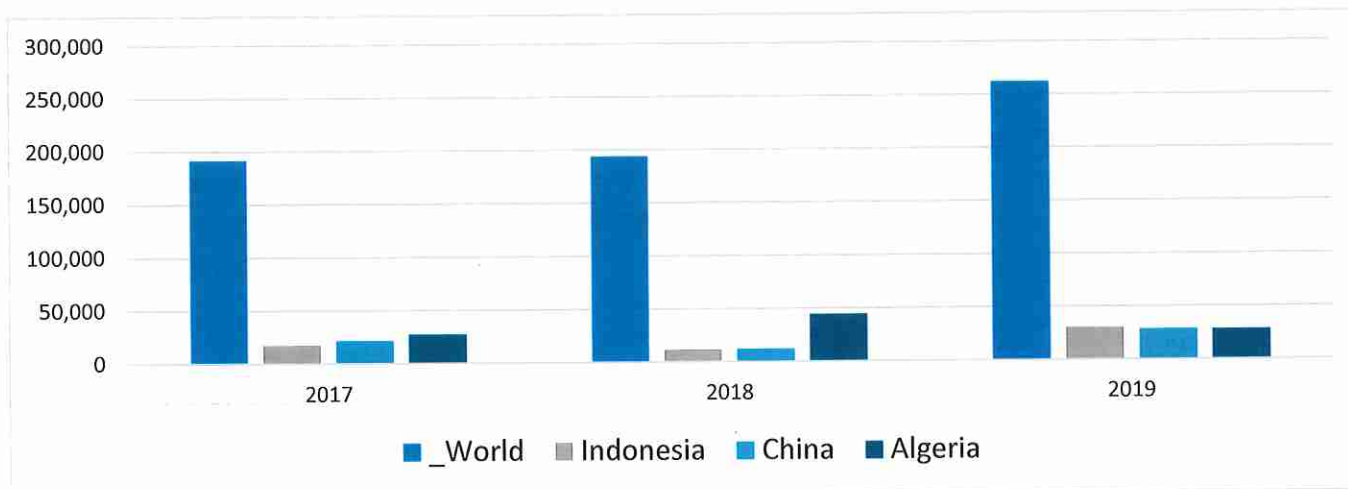
EU28 Exports to _World

(in tonnes)

Commodity: 040210, Milk And Cream, Concentrated, Whether Or Not Sweetened, In Powder, Granules Or Other Solid Forms, Of A Fat Content, By Weight, Not Exceeding 1.5%

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	191,299	193,861	261,908	100%	100%	100%	35%
Indonesia	T	17,213	11,117	30,070	9%	6%	11%	170%
China	T	21,186	11,825	28,395	11%	6%	11%	140%
Algeria	T	26,937	44,145	28,123	14%	23%	11%	-36%



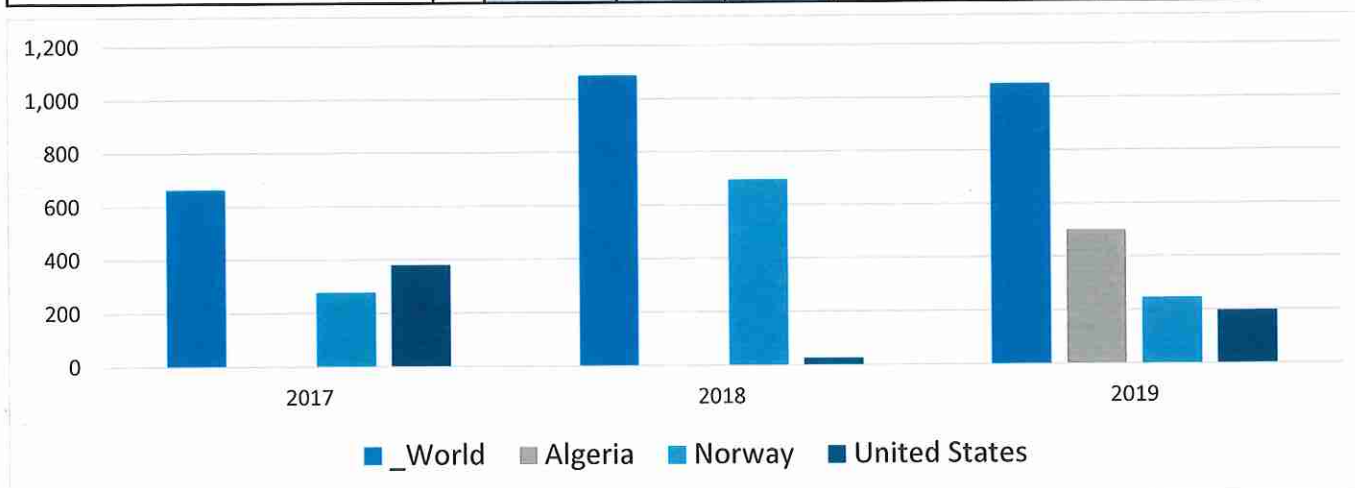
EU28 Imports from _World

(in tonnes)

Commodity: 040210, Milk And Cream, Concentrated, Whether Or Not Sweetened, In Powder, Granules Or Other Solid Forms, Of A Fat Content, By Weight, Not Exceeding 1.5%

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	662	1,087	1,050	100%	100%	100%	-3%
Algeria	T	0	0	500	0%	0%	48%	
Norway	T	277	694	245	42%	64%	23%	
United States	T	378	26	196	57%	2%	19%	654%



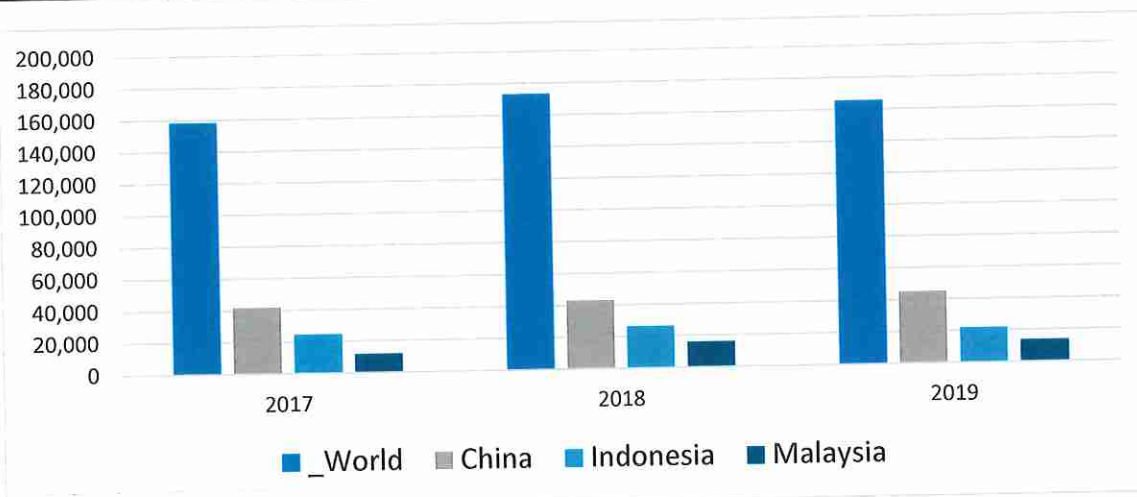
EU28 Exports to _World

(in tonnes)

Commodity: 0404, Whey And Other Products Consisting Of Natural Milk Constituents, Whether Or Not Concentrated Or Sweetened, Nesoi

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	158,268	173,334	165,652	100%	100%	100%	-4%
China	T	41,707	43,010	44,867	26%	25%	27%	4%
Indonesia	T	24,248	26,064	21,643	15%	15%	13%	-17%
Malaysia	T	11,706	15,802	13,567	7%	9%	8%	-14%



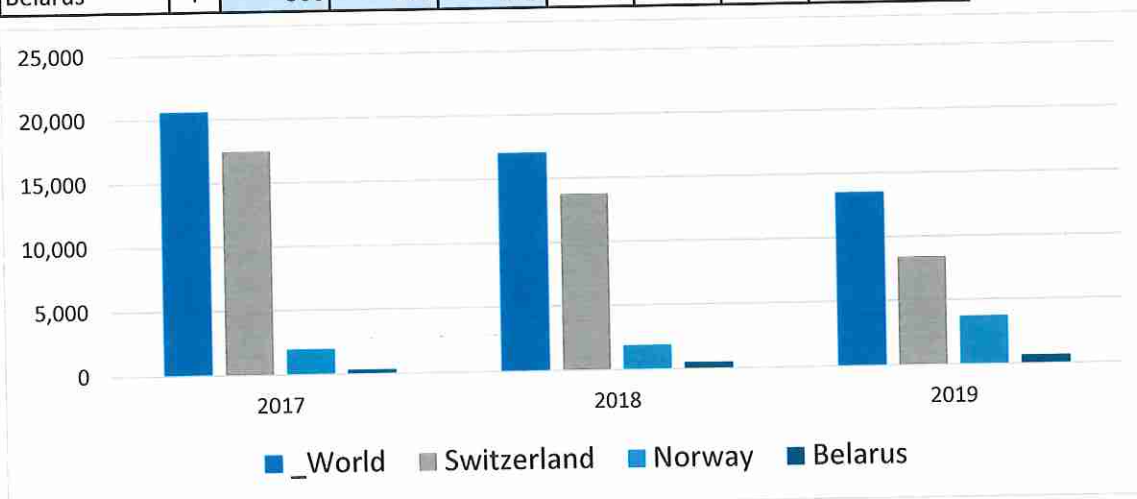
EU28 Imports from _World

(in tonnes)

Commodity: 0404, Whey And Other Products Consisting Of Natural Milk Constituents, Whether Or Not Concentrated Or Sweetened, Nesoi

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	20,571	17,006	13,524	100%	100%	100%	-20%
Switzerland	T	17,466	13,734	8,377	85%	81%	62%	-39%
Norway	T	1,928	1,860	3,696	9%	11%	27%	99%
Belarus	T	300	480	620	1%	3%	5%	29%



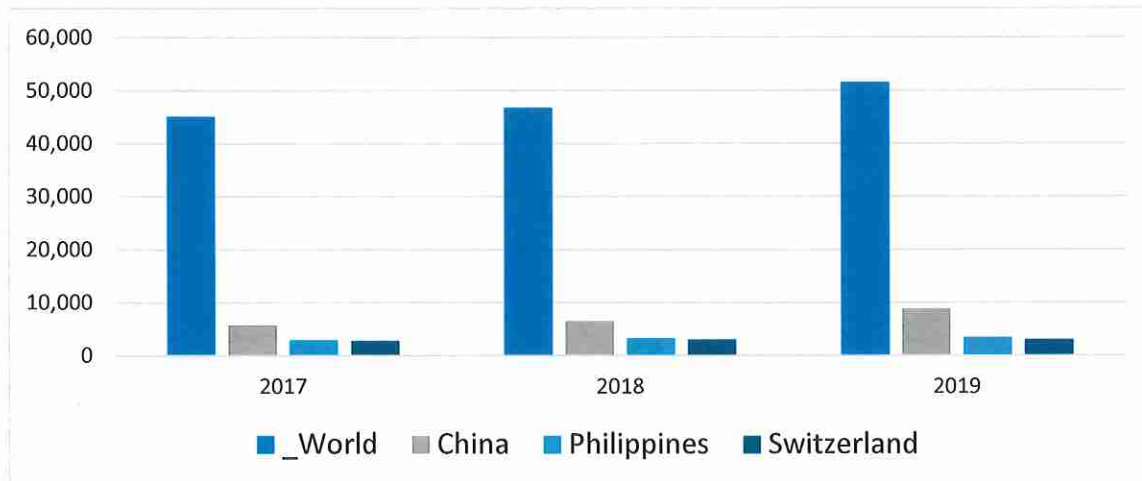
EU28 Exports to _World

(in tonnes)

Commodity: 0403, Buttermilk, Curdled Milk And Cream, Yogurt, Kephir Etc., Whether Or Not Flavored Etc. Or Containing Added Fruit Or Cocoa

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	45,086	46,763	51,581	100%	100%	100%	10%
China	T	5,734	6,487	8,766	13%	14%	17%	35%
Philippines	T	2,883	3,235	3,445	6%	7%	7%	6%
Switzerland	T	2,793	3,005	2,982	6%	6%	6%	-1%



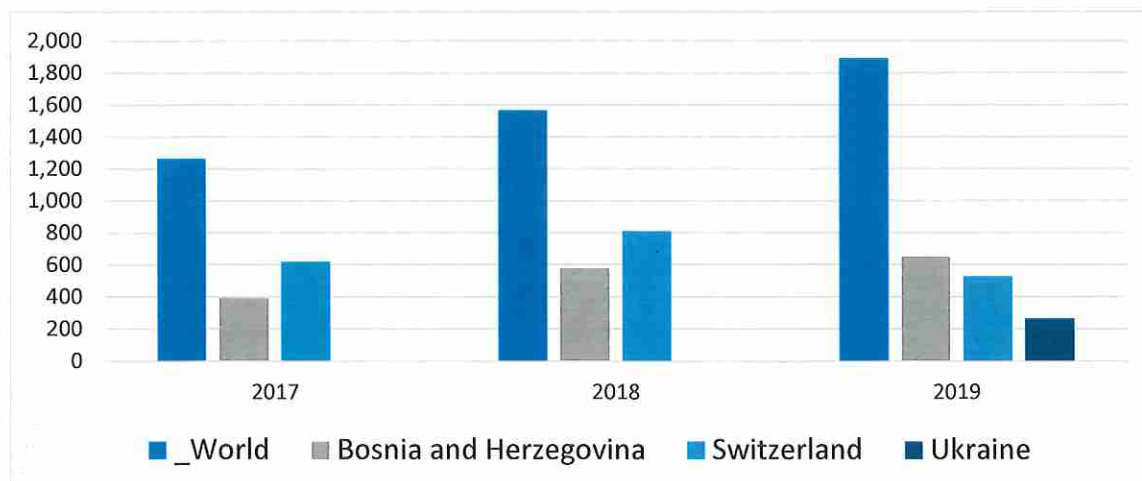
EU28 Imports from _World

(in tonnes)

Commodity: 0403, Buttermilk, Curdled Milk And Cream, Yogurt, Kephir Etc., Whether Or Not Flavored Etc. Or Containing Added Fruit Or Cocoa

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	1,262	1,566	1,892	100%	100%	100%	21%
Bosnia and Herzegovina	T	390	574	646	31%	37%	34%	13%
Switzerland	T	617	809	526	49%	52%	28%	-35%
Ukraine	T	0	4	264	0%	0%	14%	6500%



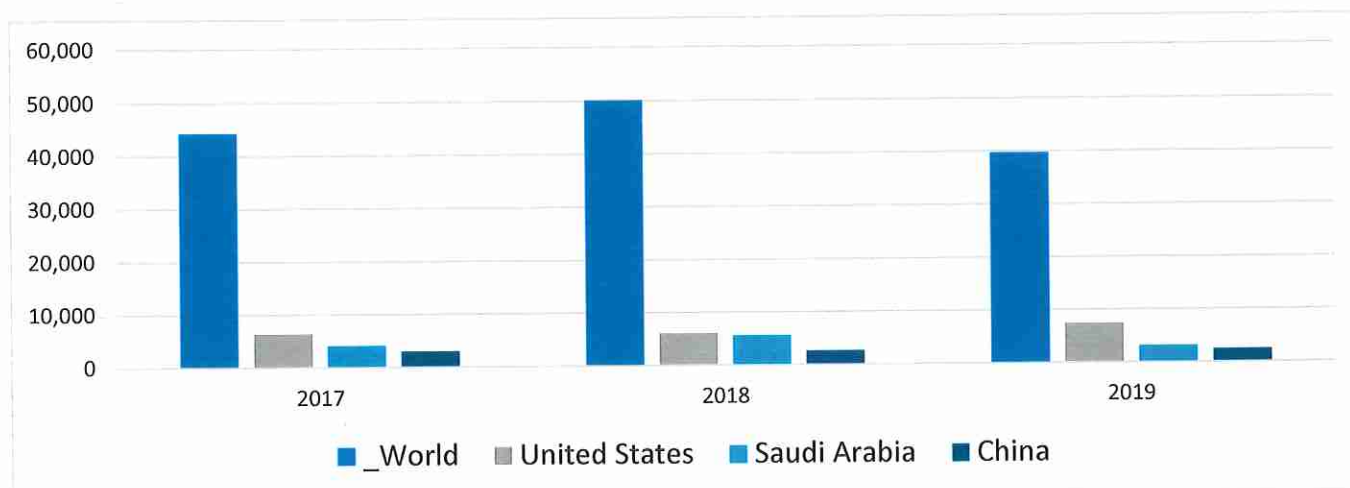
EU28 Exports to _World

(in tonnes)

Commodity: 0405, Butter And Other Fats And Oils Derived From Milk

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	44,273	50,125	39,711	100%	100%	100%	-21%
United States	T	6,339	6,034	7,312	14%	12%	18%	21%
Saudi Arabia	T	4,022	5,523	3,063	9%	11%	8%	-45%
China	T	2,979	2,589	2,432	7%	5%	6%	-6%



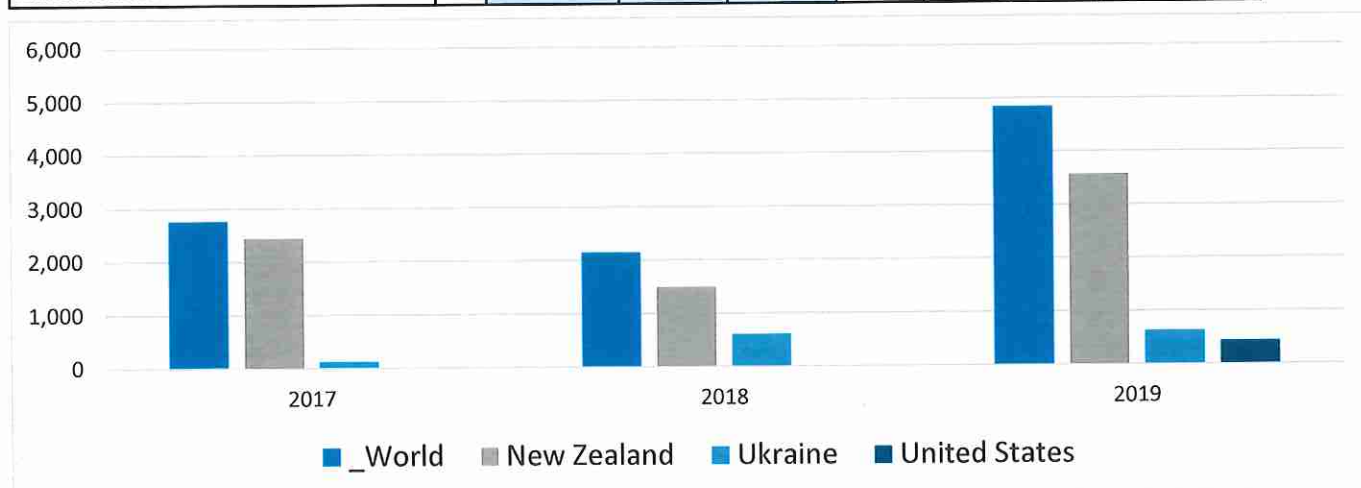
EU28 Imports from _World

(in tonnes)

Commodity: 0405, Butter And Other Fats And Oils Derived From Milk

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	2,757	2,146	4,838	100%	100%	100%	125%
New Zealand	T	2,439	1,491	3,563	88%	69%	74%	139%
Ukraine	T	115	599	624	4%	28%	13%	4%
United States	T	0	0	436	0%	0%	9%	



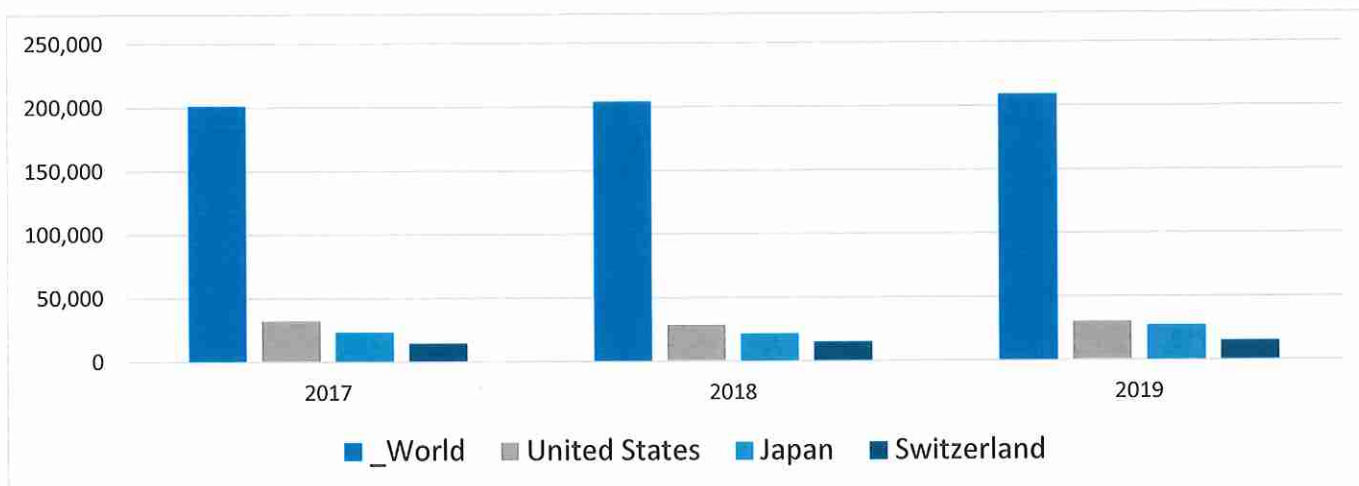
EU28 Exports to _World

(in tonnes)

Commodity: 0406, Cheese And Curd

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	201,009	204,007	208,950	100%	100%	100%	2%
United States	T	32,074	28,396	30,074	16%	14%	14%	6%
Japan	T	23,054	21,521	27,389	11%	11%	13%	27%
Switzerland	T	14,246	15,009	15,089	7%	7%	7%	1%



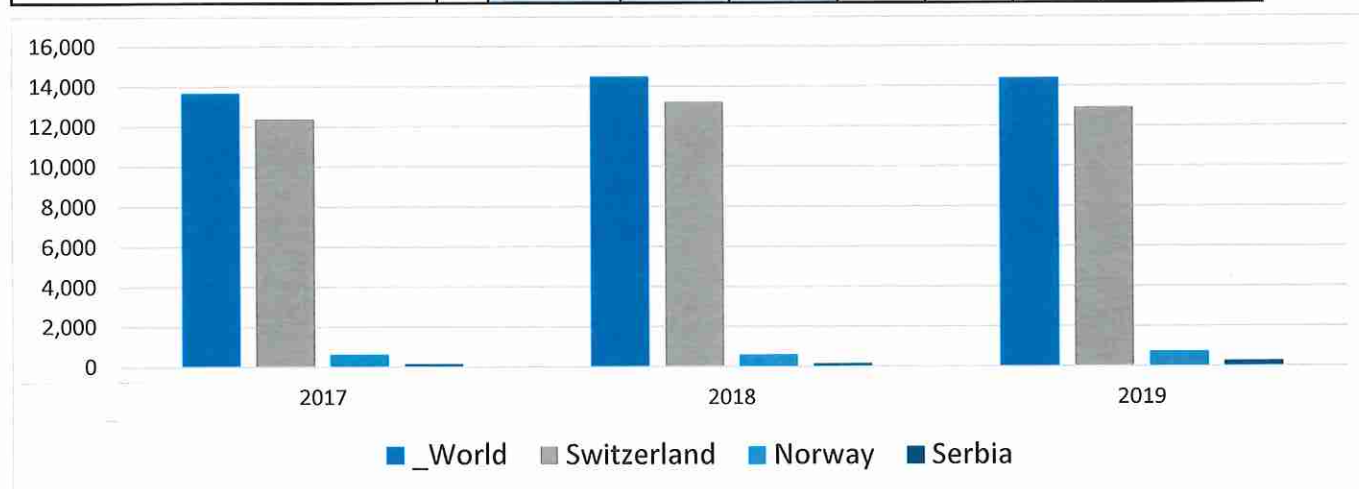
EU28 Imports from _World

(in tonnes)

Commodity: 0406, Cheese And Curd

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	13,663	14,471	14,406	100%	100%	100%	0%
Switzerland	T	12,365	13,221	12,923	90%	91%	90%	-2%
Norway	T	604	590	742	4%	4%	5%	26%
Serbia	T	133	154	253	1%	1%	2%	64%



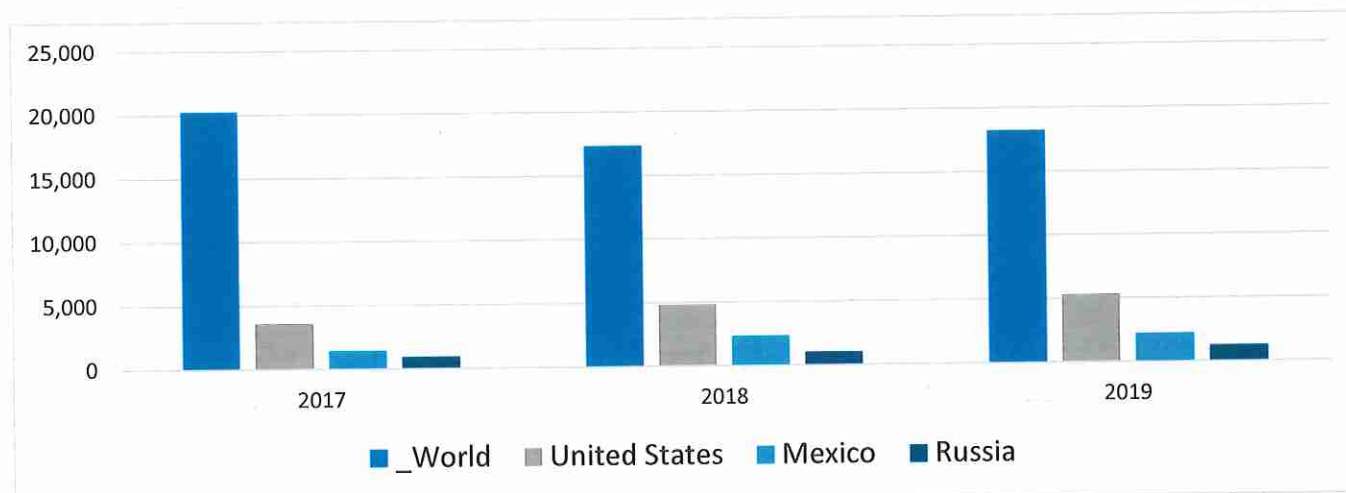
EU28 Exports to _World

(in tonnes)

Commodity: 3501, Casein, Caseinates And Other Casein Derivatives; Casein Glues

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	20,235	17,325	18,221	100%	100%	100%	5%
United States	T	3,573	4,803	5,285	18%	28%	29%	10%
Mexico	T	1,434	2,322	2,200	7%	13%	12%	-5%
Russia	T	924	1,022	1,262	5%	6%	7%	23%



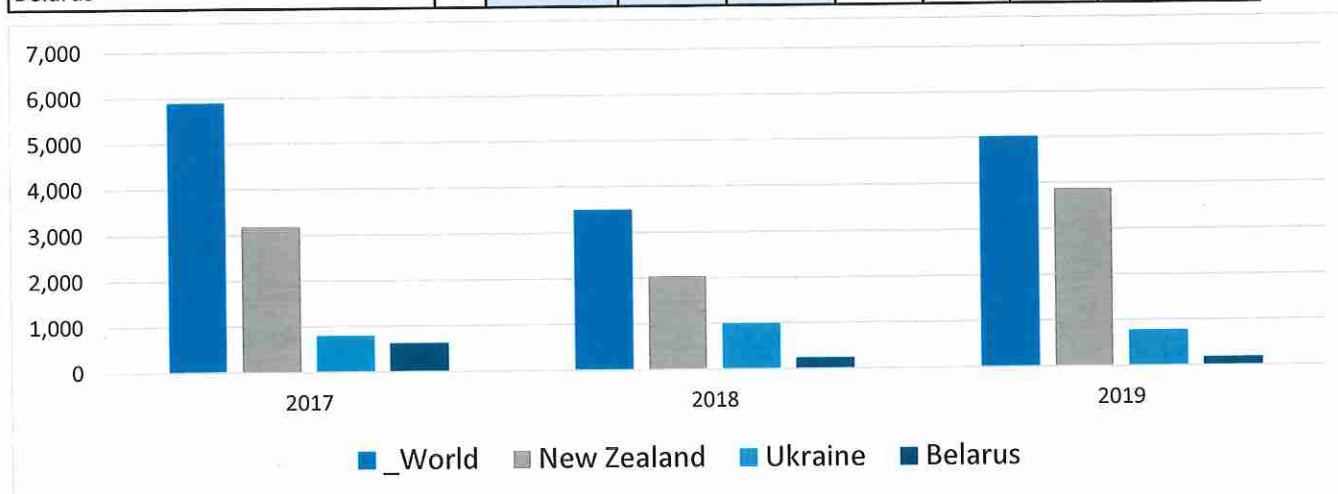
EU28 Imports from _World

(in tonnes)

Commodity: 3501, Casein, Caseinates And Other Casein Derivatives; Casein Glues

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	5,888	3,500	5,018	100%	100%	100%	43%
New Zealand	T	3,190	2,034	3,871	54%	58%	77%	90%
Ukraine	T	784	986	772	13%	28%	15%	-22%
Belarus	T	618	230	180	10%	7%	4%	-22%



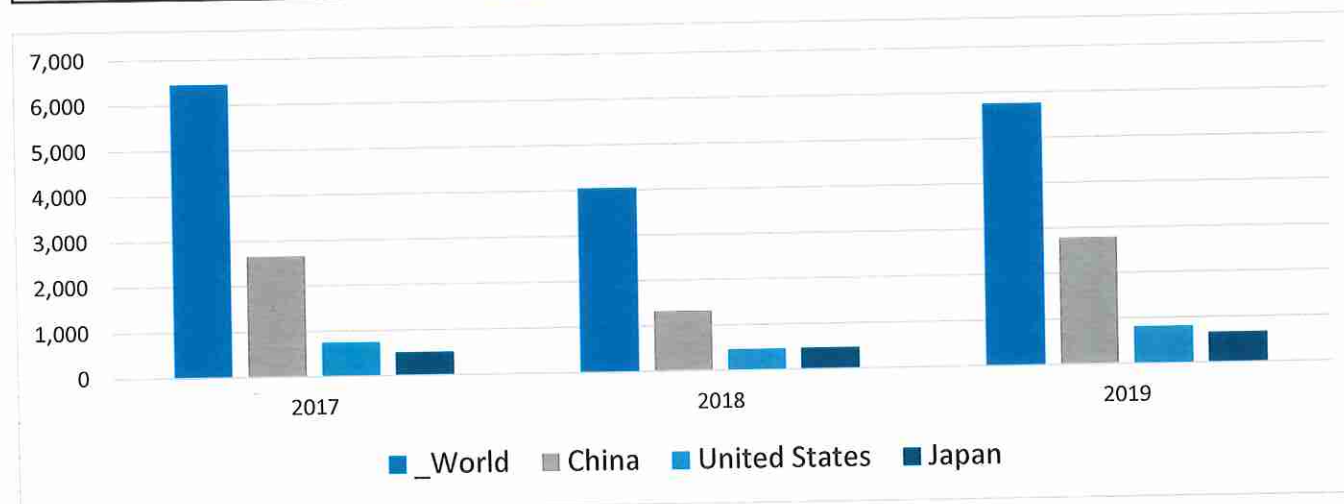
EU28 Exports to _World

(in tonnes)

Commodity: 350220, Milk Albumin, Including Concentrates Of Two Or More Whey Proteins

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	6,451	4,045	5,757	100%	100%	100%	42%
China	T	2,652	1,311	2,782	41%	32%	48%	112%
United States	T	738	455	806	11%	11%	14%	77%
Japan	T	504	460	658	8%	11%	11%	43%



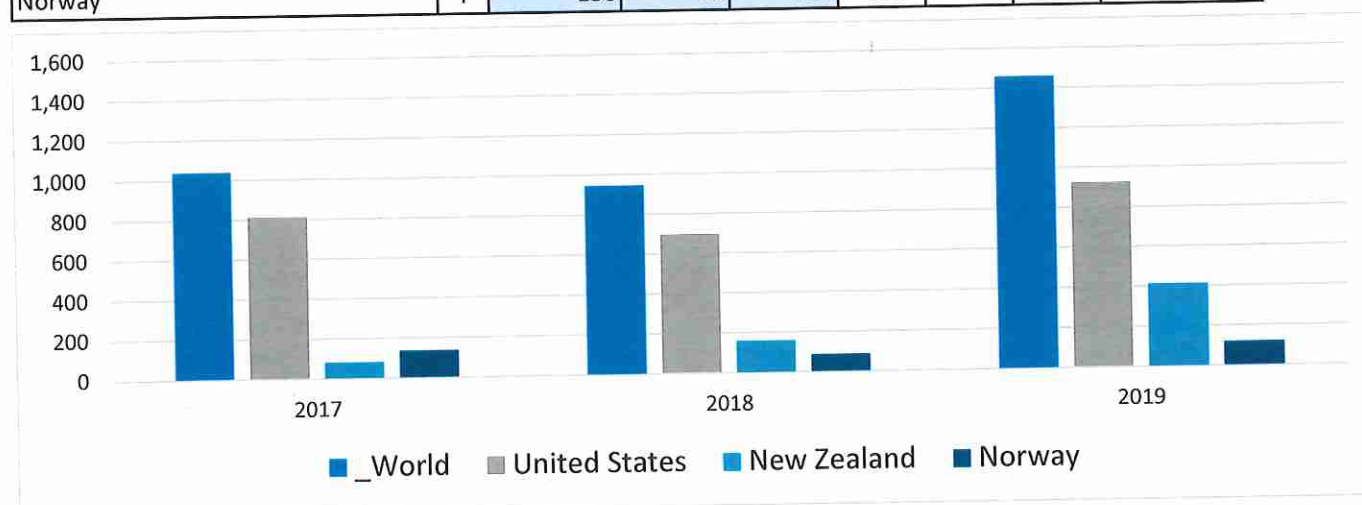
EU28 Imports from _World

(in tonnes)

Commodity: 350220, Milk Albumin, Including Concentrates Of Two Or More Whey Proteins

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	1,036	943	1,459	100%	100%	100%	55%
United States	T	812	696	922	78%	74%	63%	32%
New Zealand	T	81	159	414	8%	17%	28%	160%
Norway	T	136	86	120	13%	9%	8%	40%



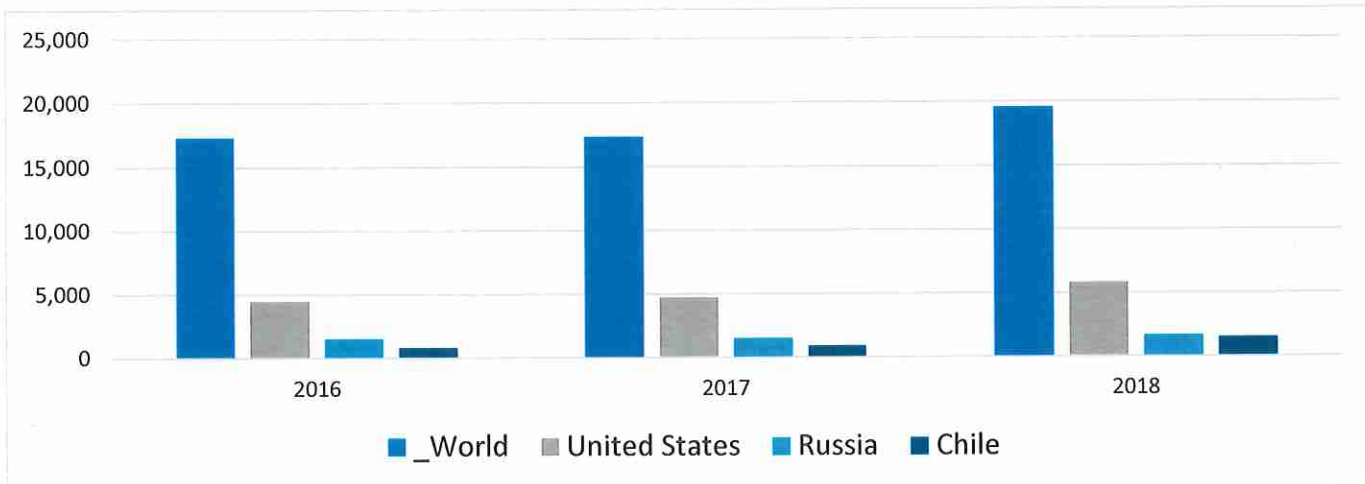
EU28 Exports to _World

(in tonnes)

Commodity: 350400, Peptones And Derivatives; Other Proteins And Derivatives, Nesoi; Hide Powder, Chromed Or Not

Year to Date: March, 2017 - 2019

Partner		2016	2017	2018	2016	2017	2018	%Δ 2019/18
_World	T	17,303	17,346	19,585	100%	100%	100%	13%
United States	T	4,458	4,703	5,818	26%	27%	30%	24%
Russia	T	1,512	1,510	1,654	9%	9%	8%	10%
Chile	T	805	900	1,502	5%	5%	8%	67%



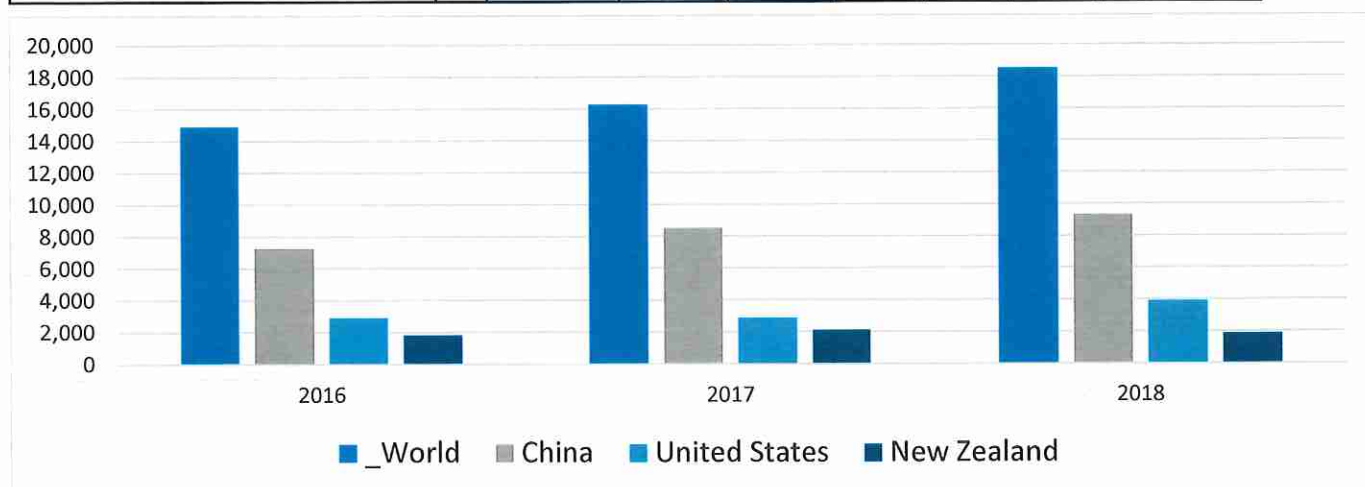
EU28 Imports from _World

(in tonnes)

Commodity: 350400, Peptones And Derivatives; Other Proteins And Derivatives, Nesoi; Hide Powder, Chromed Or Not

Year to Date: March, 2017 - 2019

Partner		2016	2017	2018	2016	2017	2018	%Δ 2019/18
_World	T	14,879	16,262	18,519	100%	100%	100%	14%
China	T	7,244	8,517	9,317	49%	52%	50%	9%
United States	T	2,884	2,865	3,895	19%	18%	21%	36%
New Zealand	T	1,806	2,112	1,865	12%	13%	10%	-12%



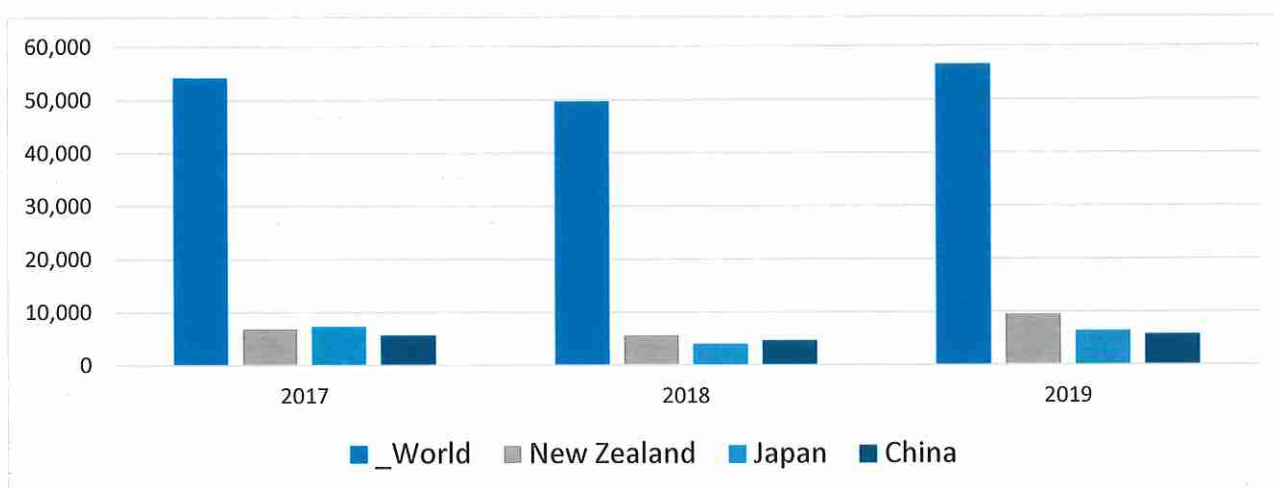
EU28 Exports to _World

(in tonnes)

Commodity: 170211, Lactose And Lactose Syrup Containing By Weight 99% Or More Lactose, Expressed As Anhydrous Lactose, Calculated On The Dry Matter

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	54,130	49,721	56,610	100%	100%	100%	14%
New Zealand	T	6,829	5,590	9,490	13%	11%	17%	70%
Japan	T	7,258	3,946	6,369	13%	8%	11%	61%
China	T	5,670	4,621	5,701	10%	9%	10%	23%



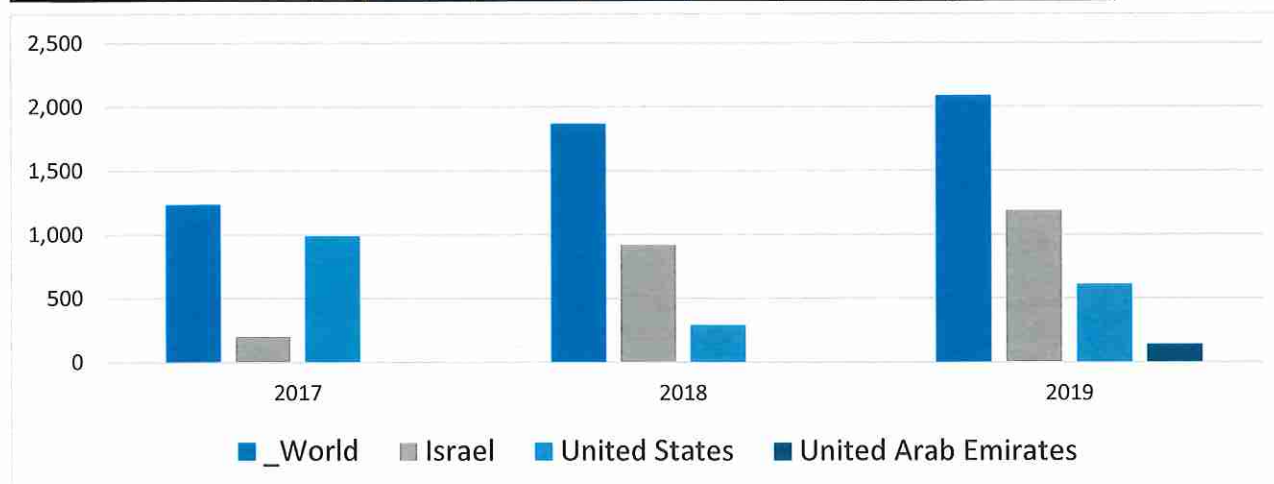
EU28 Imports from _World

(in tonnes)

Commodity: 170211, Lactose And Lactose Syrup Containing By Weight 99% Or More Lactose, Expressed As Anhydrous Lactose, Calculated On The Dry Matter

Year to Date: March, 2017 - 2019

Partner		2017	2018	2019	2017	2018	2019	%Δ 2019/18
_World	T	1,235	1,868	2,087	100%	100%	100%	12%
Israel	T	197	916	1,187	16%	49%	57%	30%
United States	T	986	291	611	80%	16%	29%	110%
United Arab Emirates	T	0	0	140	0%	0%	7%	





	2015 Trigger Level (KG)	2016 Trigger Level (KG)	2017 Trigger Level (KG)	2017 trigger compared with 2016 trigger (KG)	2017 trigger % over 2016 trigger	Apr-19	
						USDA Dairy Import License Circular (KG)	2019 Imports / 2017 Trigger Level
Note 16 Other Cheese - NSPF	50,415,571	52,603,975	48,979,859	-3,624,116	-6.89%	9,211,633	18.81%
Note 17 Blue	4,779,080	4,865,957	2,911,000	-1,954,957	-40.18%	903,748	31.05%
Note 18 Cheddar	9,768,173	11,292,096	12,422,889	1,130,793	10.01%	1,544,723	12.43%
Note 19 American-Type Including Colby	14,668	663,153	3,522,556	2,859,403	431.18%	0	0.00%
Note 20 Edam & Gouda	7,700,542	8,161,533	6,816,402	-1,345,131	-16.48%	1,765,626	25.90%
Note 21 Italian-Type	18,291,760	19,591,643	13,481,064	-6,110,579	-31.19%	2,076,586	15.40%
Note 22 Gruyere - Processed	3,551,763	3,745,854	7,854,833	4,108,979	109.69%	797,880	10.16%
Note 23 Other Cheese -NSPF - Lowfat	149,910	153,319	5,474,907	5,321,588	3470.93%	1,090	0.02%
Note 25 Swiss	26,807,720	28,790,738	34,475,276	5,684,538	19.74%	6,773,103	19.65%
TOTAL Cheese	121,479,187	129,868,268	135,938,786	6,070,518	4.67%	23,074,389	16.97%
Note 06 Butter	9,414,976	13,656,765	6,977,000	-6,679,765	-48.91%	1,960,832	28.10%
Note 07 Dried Skim Milk			5,261,000			106,475	2.02%
Note 08 Dried Whole Milk	3,293,081	3,406,679	3,321,300	-85,379	-2.51%	393,377	11.84%
Note 12 Dr. Buttermilk/Whey			224,981			0	0.00%
Note 14 Butter Oil	5,840,777	6,076,713	6,080,500	3,787	0.06%	710,097	11.68%
TOTAL Non-Cheese	18,548,834	23,140,157	21,864,781	-1,275,376		3,170,781	
GRAND TOTAL	140,028,021	153,008,425	157,803,567	4,795,142		26,245,170	

Color Scale

slightly exceeding	33.33%	end of Apr-19
highly exceeding	33.33%	end of Apr-19
exceeding 100% already		end of Apr-19

Apr-19 33.33% of the year

Source: U.S.Customs and Border Protection



Important upcoming events 2019 - 2020

Date	Event	Jurisdiction
2019	General election India	Global
2019 Jan-Jun	Romanian Presidency	EU
2019 Mar	Brexit: provisional deadline for the UK exit deal (transition period needed)	EU
2019 May	EP elections	EU
2019 Jul-Dec	Finnish Presidency	EU
2019 Oct	European Commission election	EU
<hr/>		
2020	Possible new CAP starts applying	EU
2020 Jan-Jun	Croatian Presidency	EU
2020 Jul-Dec	German Presidency	EU
2020 Nov	Presidential election USA	Global
2020 Dec	Brexit - UK exit deal (end of transition period)	EU
2020 Dec	2nd Report on the implementation of CAP Reform	EU