connect to the world of dairy

TRADE AND ECONOMICS COMMITTEE

Tuesday 15 March 2022

EDA offices

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EDA ECONOMIC REPORT

uniting dairy excellence & ambition

MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 15 MARCH 2022

Delegation: A U S T R I A

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

➲ MILK SUPPLY EVOLUTION

DELIVERIES	**COMMENT**	
Jan-Dec 2021 / Jan-Dec 2020	What are your expectations for deliveries in Q1/22 compared to Q1/21?	What are your expectations for deliveries in Q2/22 compared to Q2/21?
+ 0,5 % leap day adjusted + 0,8 %	(deliveries)	(deliveries)
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q1/22?
Current milk price: 43,13 €/100kg (Dec) (milk with 4,2 % fat, 3,4 % protein, all qualities, ex farm without tax)	Dec 21 / Dec 20: + 6,9 %	(prices)

➲ DAIRY PRODUCTS DEVELOPMENT

	Production			**Price**		**COMMENT**
	Jan-Dec 2021 / Jan-Dec 2020	Expectations Q1/22 compared to Q1/21 (+ / - / stable)	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Dec 21 / Dec 20	Expectations Q1/22 compared to Q4/21 (+ / - / stable)	(Including stocks, consumption, etc…)
SMP	- 47 %			+ 45 %		prododuction at a low level
WMP	+ 19 %			+ 45 %		production at a low level
CHEESE	+ 3,5 %			up to + 20 %		main product
BUTTER	- 4,5 %			+ 30 %		
WHEY	+ 94 %			+ 40 %		

➲

NATIONAL DAIRY MARKET DEVELOPMENTS: January 2021 – Dec 2021
(e.g. industrial developments, domestic policy changes, external factors, exports)

In Austria, milk deliveries were below the previous year's level until April 2021 and then consistently above the previous year's volume until the end of the year. Especially the last 3 months showed expansive tendencies.
The delivery of organic milk increased by 2,1 %; the share of the total delivery volume was 19,4 %.
The cost situation for the Austrian dairy industry has continued to strengthen, absorbing most of the increase in sales prices for dairy products.
The discussions and also the pressure from the food retailing regarding animal welfare (tethered housing of dairy cows etc.) have increased further. Especially for small-scale dairy farming it is very difficult to achieve a changeover in a short time without too many dairy farmers having to stop production.

Austrian foreign trade (CN-Codes 0401 – 0406, in value)

Foreign trade	Exports (2021 to 2020)	Imports (2021 to 2020)
1. quarter 2021	+ 1,8 %	- 10,0 %
2. quarter 2021	+ 2,4 %	- 0,5 %
3. quarter 2021	+ 4,6 %	+ 4,4 %
October/November 2021	+ 4,8 %	+ 5,3 %
January – November 2021	+ 3,3 %	- 0,7 %

Source: Statistik Austria

➲ **NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2022)**
(Trends, industrial changes, policy changes, **market expectations**)

➲ NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2022)

Expected evolution in milk supply (+/-?): **Production trends for main products:** **Consumption trends:** **Exports (+/- and why?):**

➲ ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION

➲ IMPACT OF COVID-19 ON THE DAIRY SECTOR

Please indicate and describe the potential ongoing effects of Covid-19 on prices, production, and internal market:

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MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 15 MARCH 2022

Delegation: BE

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

MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-Dec 2021 / Jan-Dec 2020	What are your expectations for deliveries in Q1/22 compared to Q1/21?	What are your expectations for deliveries in Q2/22 compared to Q2/21?
-0,50%	Slight + (deliveries)	stable (deliveries)
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q1/22?
Current milk price: 45,73 €/100kg (Jan)	Jan 21 / Jan 20: +41%	stable (prices)

DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Dec 2021 / Jan-Dec 2020	Expectations Q1/22 compared to Q1/21 (+ / - / stable)	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Week 49-52 2020 / 2020	Expectations Q1/22 compared to Q4/21 (+ / - / stable)	(Including stocks, consumption, etc…)
SMP	%			+53%		
WMP	%			+52%		
CHEESE	%			%		
BUTTER	%			+81%		
WHEY	%			%		

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NATIONAL DAIRY MARKET DEVELOPMENTS: January 2021 – Dec 2021

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

Newly announced nitrogen policy might lead to the discontinuation of e few dairy farms.
Belgium seems to be able to maintain their export to GB.

NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2022)

(Trends, industrial changes, policy changes, **market expectations**)

NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2022)

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

Production trends for main products: New mozzarella plant will increase production

Consumption trends:

Exports (+/- and why?): We wonder what the Brexit effects will be in Q4

ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION

IMPACT OF COVID-19 ON THE DAIRY SECTOR

Please indicate and describe the potential ongoing effects of Covid-19 on prices, production, and internal market:

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MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 15 MARCH 2022

Delegation: CZECH RFEPUBLIC

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

➲ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-Dec 2021 / Jan-Dec 2020 Jan 2022/Jan 2021	What are your expectations for deliveries in Q1/22 compared to Q1/21?	What are your expectations for deliveries in Q2/22 compared to Q2/21?
+ 1,2 % **+ 2,4 %**	**stable** (deliveries)	**stable** (deliveries)
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q1/22?
Current milk price: **37,66 €/100kg** (January 2022)	Jan 22/Jan 21: +13,9 %	**increase** (prices)

➲ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Dec 2021 / Jan-Dec 2020	Expectations Q1/22 compared to Q1/21 (+ / - / stable)	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Dec 21 / Dec 20	Expectations Q1/22 compared to Q4/21 (+ / - / stable)	(Including stocks, consumption, etc…)
SMP	**- 8,3 %**	-	stable	+31 %	stable	
WMP	**+ 11,5 %**	+	stable	+ 24 %	stable	
CHEESE	natural **+ 6,8 %** processed **+ 0,7 %**	+	stable	Edam +24 %	+	
BUTTER	**-6,0 %**	-	-	+ 19 %	+	
WHEY	**%**			+ 27 %	stable	

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➲ NATIONAL DAIRY MARKET DEVELOPMENTS: January 2021 – Dec 2021
(e.g. industrial developments, domestic policy changes, external factors, exports)

Development of other dairy products for period January-December compared y/y: Decrease in most fresh dairy categories with the exception of sour drinks and dairy spreads

- Liquid milk: +0,5 %, from that fresh milk -2,8 %, UHT + 1,2 %; school milk +76 % due to lockdown in 2020
- Cream: + 0,6 %
- Yoghurt: - 2,1 %; other fermented milk products + 5,0 %
- Dairy spreads: + 6,5 %
- Curd: -2,9 %

➲ NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2022)
(Trends, industrial changes, policy changes, **market expectations**)

The situation on the milk market remains tense:

- Farmers continue to push for higher milk prices in view of the growth of many cost-inputs
- In the manufacturing industry, the costs of cardboard and plastic packaging are still very high (+40 to 70%), there are very high energy prices and labour-costs are also rising
- At the end of the year, there was a partial increase in dairy prices for retail, a further increase continued in January this year. The price increase is at the level of +7 to +15 %, but the adjustment of prices will probably continue. However, dealing with trading systems is very difficult.
- However, rising prices may have an impact on purchasing power in the future and thus on the development of total consumption.
- **The difficult situation caused by the war in Ukraine may also have an impact on the dairy sector. Many Ukrainians have worked in the industry, but men are returning to their homeland due to general mobilization.**
- **Due to EU sanctions against Russia, the macroeconomic situation may deteriorate, the Czech currency will weaken and oil and gas supplies will diminish.**
- **Inflation is now high in the country, at around 9 %, and the above reasons may exacerbate it.**

➲ NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2022)

Expected evolution in milk supply (+/-?): more/less stable situation - may be affected by rising feed and oil prices, but also by demotivation of farmers.

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

Consumption trends: The development of consumption in 2021 was so far similar to that in 2020, at the beginning of the year there was even further growth. However, following the current rise in prices and high inflation rate, a certain slowdown and decline in consumption can be expected due to weakened purchasing power.

Exports (+/- and why?): stable situation is expected so far

➲ ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION

- Dairy market outlook
- Possible effects of the war in Ukraine on the European dairy sector
- EU trade issues with 3rd countries (FTA, etc)

➲ IMPACT OF COVID-19 ON THE DAIRY SECTOR

Please indicate and describe the potential ongoing effects of Covid-19 on prices, production, and internal market:

- The pandemic situation (wave of the Omikron variant) in the Czech Republic is gradually receding, and the number of new ill people is currently decreasing significantly.
- The Czech government is once again loosening anti-Covid- measures.
- Gastronomy is open, confirmation of infectivity is no longer required.
- Schools also operate and no longer compulsory weekly testing is carried out.
- However, the vaccination coverage of the population is lower than in Western European countries (2 doses approx. 67%, 3 doses approx. 45%).
- The effects of the epidemic on the dairy industry are not significant in terms of milk collection, prices and processing, the biggest problem was only in the lack of labour due to illness and quarantine of employees. However, both primary producers and processors dealt with this.

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MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 15 MARCH 2022

Delegation: Germany

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➲ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-Dec 2021 / Jan-Dec 2020	What are your expectations for deliveries in Q1/22 compared to Q1/21?	What are your expectations for deliveries in Q2/22 compared to Q2/21?
-1,6%	- (deliveries)	- (deliveries)
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q1/22?
Current milk price: 40,38 €/100kg (Dec)	Dec 21 / Dec 20: +22,8%	++ (prices)

➲ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Dec 2021 / Jan-Dec 2020	Expectations Q1/22 compared to Q1/21 (+ / - / stable)	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Dec 21 / Dec 20	Expectations Q1/22 compared to Q4/21 (+ / - / stable)	(Including stocks, consumption, etc…)
SMP	-15,3%	-	-	+55,7%	+	
WMP	-4,2%	-	-	+48,7%	+	
CHEESE	+0,5%	+	+	+25,8%	+	
BUTTER	-7,0%	-	-	+66,9%	+	
WHEY	+16,6%	+	+	+46,9%	+	

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➲ NATIONAL DAIRY MARKET DEVELOPMENTS: January 2021 – Dec 2021
(e.g. industrial developments, domestic policy changes, external factors, exports)

A new government was established at the end of 2021 with the participation of the green party. The focus on environmental constraints, animal welfare, organic etc. will increase.

➲ NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2022)
(Trends, industrial changes, policy changes, **market expectations**)

Milk production will increase seasonally up to May. Higher milk prices will contribute to a certain stabilisation of milk production. Higher prices of dairy products will reach consumers from May to July in times of strong general inflation. Consumer reactions uncertain. An increasing demand for entry level price products is likely. Further cost increases of energy, packaging and other goods are challenging for dairies. High uncertainty due to the war in Ukraine.

➲ NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2022)

Expected evolution in milk supply (+/-?):stabilizing, but still moderate

Production trends for main products: cheese production slightly increased due to strong demand. Milk powder and butter production will remain low or slightly decreasing

Consumption trends: Consumption will follow long-term trends, liquid milk decreasing, cheese increasing

Exports (+/- and why?): milk powder decreasing due to lower availability

➲ ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION

➲ IMPACT OF COVID-19 ON THE DAIRY SECTOR

Please indicate and describe the potential ongoing effects of Covid-19 on prices, production, and internal market:

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MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 15 MARCH 2022

Delegation: DK

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

➲ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-Dec 2021 / Jan-Dec 2020	What are your expectations for deliveries in Q1/22 compared to Q1/21?	What are your expectations for deliveries in Q2/22 compared to Q2/21?
-0.3%	-1% to +1% (deliveries)	-2% to +2% (deliveries)
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q1/22?
Current milk price: 42.4 €/100kg (Dec)	Dec 21 / Dec 20: +19%	probably higher (prices)

➲ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Dec 2021 / Jan-Dec 2020	Expectations Q1/22 compared to Q1/21 (+ / - / stable)	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Dec 21 / Dec 20	Expectations Q1/22 compared to Q4/21 (+ / - / stable)	(Including stocks, consumption, etc…)
SMP	-19%			%		
WMP	+7%			%		
CHEESE	-2%			%		
BUTTER	+12%			%		
WHEY	%			%		

➲ NATIONAL DAIRY MARKET DEVELOPMENTS: January 2021 – Dec 2021
(e.g. industrial developments, domestic policy changes, external factors, exports)

The milk price in 2021 was stable and increasing following stability in demand but also due to higher production costs. Like elsewhere, especially feed and energy prices has gone up and thus higher milk prices has not necessarily led to higher margins for the farmers.

Politically the Danish parliament agreed on an agricultural reform in October 2021. This agreement sets out binding targets for the sector to reduce CO_2-emissions with 55-65 percent in 2030.

In large parts of 2021 Covid-19 was still a factor and dairies focused on keeping the supply chain running while keeping employees healthy.

➲ NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2022)
(Trends, industrial changes, policy changes, **market expectations**)

The war in Ukraine is expected to lead to further increases in especially wheat and energy prices.

In the beginning of 2022, an economically advisory board appointed by the Danish Parliament has presented different designs for a CO_2-tax in Denmark. Politically negotiations will follow.

➲ NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2022)

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

Production trends for main products:

Consumption trends:

Exports (+/- and why?):

➲ ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION

➲ IMPACT OF COVID-19 ON THE DAIRY SECTOR

Please indicate and describe the potential ongoing effects of Covid-19 on prices, production, and internal market:

There are no longer any Covid-19 related restrictions in Denmark and we don't see Covid-19 affecting prices in Denmark. However, there can still be some effects on production and exports due to shifts in consumption, behaviour and Covid-19-developments in other countries and export markets.

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MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 15 MARCH 2022

Delegation: FRANCE

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

➲ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-Dec 2021 / Jan-Dec 2020	What are your expectations for deliveries in Q1/22 compared to Q1/21?	What are your expectations for deliveries in Q2/22 compared to Q2/21?
-1,5%	-1,5% (deliveries)	stable (deliveries)
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q1/22?
Current milk price: 412 €/100kg (Dec)	Dec 21 / Dec 20: 7,7%	430 (prices)

➲ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Dec 2021 / Jan-Dec 2020	Expectations Q1/22 compared to Q1/21 (+ / - / stable)	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Dec 21 / Dec 20	Expectations Q1/22 compared to Q4/21 (+ / - / stable)	(Including stocks, consumption, etc…)
SMP	-2%	+	+	+47%	+	
WMP	-1,3%	+	+	+53%	+	
CHEESE	+2,5%			%	+	
BUTTER	- 3,2%	+	+	+76%	+	
WHEY	- 1,5%	+	+	+48%	+	

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NATIONAL DAIRY MARKET DEVELOPMENTS: January 2021 – Dec 2021

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

In 2021, the main driver of the dairy outlook was the high costs of production and the decrease of the milk supply. Producers in French show no more motivation and stop the dairy activity either to go to retirement early or for another producing activity, even in the main dairy region (Bretagne, Normandie).

Price of milk was up compared to last year thank to better commodities prices.

Prices for dairy commodities have increased due to lack of supply for dairy commodities, empty stock, and a good demand in the 2nd semester.

Main legislative change was the EGALIM2 imposing the agricultural raw material part of the tariff to be non-negotiable which has a huge impact on the retail-industry relationship.

NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2022)

(Trends, industrial changes, policy changes, **market expectations**)

High costs should remain a reality in 2022.
The production forecast in France is stable to decrease depending on the weather conditions.
Milk prices should remain higher than 2021 for all year.

NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2022)

Expected evolution in milk supply (+/-?): stable to decrease (high cost of production, decrease of the herd numbers, main driver will be the weather)

Production trends for main products: stable to decrease depending on the milk production

Consumption trends: stable to decrease: inflation will have an effect on consumption at some point

Exports (+/- and why?): stable to decrease (less disponibility and inflation)

➲ ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION

It is still unclear the effect of the farm to fork strategy on the milk production.

➲ IMPACT OF COVID-19 ON THE DAIRY SECTOR

Please indicate and describe the potential ongoing effects of Covid-19 on prices, production, and internal market:

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MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 15 MARCH 2022

Delegation: IRELAND

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

➲ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-Dec 2021 / Jan-Dec 2020	What are your expectations for deliveries in Q1/22 compared to Q1/21?	What are your expectations for deliveries in Q2/22 compared to Q2/21?
+5.4%	+2.5% (deliveries)	+2.5% (deliveries)
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q1/22?
Current milk price: 41.5 €/100kg (Dec)	Dec 21 / Dec 20: 23%	Rising (prices)

DAIRY PRODUCTS DEVELOPMENT

Table 1 Milk Statistics

Category	Year	Unit	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Domestic milk intake	2020	million	176.2	331.7	725.7	982.7	1115.3	1031.0	985.0	867.6	725.4	646.8	449.8	258.8	**8295.9**
by creameries and	2021	litres	182.2	352.4	829.7	1060.5	1181.0	1067.3	1017.3	917.4	776.7	652.8	460.6	256.3	**8754.0**
pasteurisers	2022		174.7												
Fat content	2020	%	4.31	4.29	4.27	3.97	3.87	3.97	4.04	4.17	4.43	4.71	4.86	4.67	**4.20**
	2021		4.42	4.45	4.32	3.98	3.94	3.97	3.99	4.19	4.43	4.77	4.90	4.75 [1]	**4.23**
	2022		4.42												
Protein content	2020	%	3.48	3.38	3.29	3.43	3.46	3.45	3.51	3.57	3.78	3.99	3.85	3.67	**3.55**
	2021		3.51	3.44	3.33	3.45	3.49	3.47	3.43	3.54	3.73	3.95	3.89	3.72 [1]	**3.55**
	2022		3.48												
Total milk sold for human	2020	million	43.1	42.5	45.8	47.1	47.3	45.7	47.4	44.4	41.7	41.1	39.5	39.9	**525.4**
consumption [2]	2021	litres	40.4	36.3	42.1	42.9	46.6	44.7	45.2	44.8	41.7	41.9	40.9 [1]	38.9 [3]	**506.4** [3]
	2022		40.3 [3]												
of which:	2020	million	26.1	25.8	29.1	32.0	31.6	30.6	31.5	28.9	26.7	26.3	25.0	25.1	**338.6**
Whole milk sales	2021	litres	25.1	22.4	26.5	27.7	30.8	29.7	30.2	29.0	26.6	26.1	25.5	24.1 [3]	**323.7** [3]
	2022		24.9 [3]												
Skimmed & semi-	2020	million	17.0	16.7	16.7	15.2	15.7	15.1	15.9	15.4	15.0	14.8	14.5	14.8	**186.8**
skimmed milk sales	2021	litres	15.3	13.9	15.6	15.2	15.8	15.0	15.1	15.8	15.1	15.8	15.4	14.9 [3]	**182.7** [3]
	2022		15.4 [3]												
Butter	2020	'000	7.2	11.2	22.6	29.0	29.8	30.3	30.9	26.2	24.0	22.9	17.6	13.0	**264.7**
	2021	tonnes	6.5	10.7	26.9	30.5	31.4	31.5	30.8	28.8	26.5	21.6	17.8	12.2	**275.1**
	2022		*												
Skimmed milk powder	2020	'000	*	2.8	7.3	18.9	24.6	20.1	20.3	17.8	12.5	8.3	*	*	**150.1**
	2021	tonnes	*	*	11.4	17.7	27.7	19.3	17.1	16.4	11.1	5.5	*	7.4	**147.6**
	2022		*												
Cheese	2019	'000	3.6	9.2	25.0	27.7	31.7	33.3	28.6	31.4	32.2	26.8	23.5	5.4	**278.4**
	2020	tonnes	3.3	9.3	30.6	28.2	31.6	34.3	28.7	29.7	33.9	27.8	21.4	6.8	**285.4**

NATIONAL DAIRY MARKET DEVELOPMENTS: January 2021 – Dec 2021

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

- New government 'Food Vison Dairy' committee formed to map out the future of Irish dairy over the next decade. DII leads the Irish dairy industry delegation.
- Glanbia won their supreme court case against an Environmental lobby to build a major continental cheese factory in the south of the island.
- Ukraine Russia conflict v concerning and tragic and will have market consequences.
- Exceptional resilience in processing and trade over the Covid & Brexit eras.
- Prices & weather good and farmers generally happy bar what they see an environmental activist bullying.
- The Irish Protocol continues to be working exceptionally well for dairy across the island.
- Still campaigning to get clarity on mixed Irish origin goods and access to market tools.
- British have announced that they will not be asking for EHCs for West/East Dairy Trade until at least Q3 2022 which is welcome
- Continued worry in Irish dairy circles about politicisation and weaponization of the Protocol by Britain.
- Encourage a range of solutions around overall easements- clear the main answer is around a common SPS standard that would be win win for both sides.

NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2022)

(Trends, industrial changes, policy changes, **market expectations**)

- Food Vison Dairy Group to report before the summer.
- Government to formalise legally binding climate targets in advance of summer also.
- Watching developments in the tragic Ukraine Russia conflict closely.
- Price for dairy in Ireland are at decade highs.
- Problems emerging though with cost inflation at factory and farm level eroding gains and in fact running ahead of any price rises.
- Spiralling Energy, Packaging, Labour and international shipping costs are a concern for companies.
- Irish processors to now report EU solids of 4.2 and 3.6 so will make comparisons easier and more reflective of actual solids.

NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2022)

Expected evolution in milk supply (+/-?)

+3%.

Certainly expecting moderation of milk supply.

Production trends for main products:

Continued move into value add Specialised nutrition products. Pressure on infant formula category because of Chinese regulatory restrictions.
Cheese in particular performing strongly- a concerted effort to diversify portfolio away from Cheddar in anticipation for Brexit paying off.
Both branded and consumer butter going well.
Powders still preform well esp at Irish peak off grass over the summer
Any EU-British trade dispute would be a big concern, US trade war de-escalation has helped greatly.

Consumption trends:

Recent 10c a litre retail increase for commodity milk.
Consumption trends have held up well across all categories in Ireland. Liquid milk possibly the only category in decline.

Exports (+/- and why?):

Stable export performance in line with output.
Some issues with IF exports to China as outlined.
Exports concentrated in global markets rather than Britain and EU.

ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION

- Energy in dairy processing now a big issue for cost on competitiveness.
- Huge production price inflation.
- Need for clear scope and timelines on Commission recent commitment to conduct an impact assessments be done on Farm to Fork strategy.
- Easements for EU single market goods returning to the single market via the UK.
- EU/UK help around mixed milk products from the island of Ireland EU FTA access and sCMO.
- Protection of dairy terms- Commission clearly not enforcing clear existing law. Watering down and subsequent deletion of EP 171 amendment was v disappointing.
- Need for EU to work strongly towards digitisation of Certs and other documents in line with international digital economy.

IMPACT OF COVID-19 ON THE DAIRY SECTOR

Please indicate and describe the potential ongoing effects of Covid-19 on prices, production, and internal market:

Recent 4th wave in Ireland resulted in up to 35% absentee rates- Ireland was lucky this occurred not in the peak period.

Huge effort from Processors and the wider dairy supply chain in Ireland to keep things going over covid and that has been successful. Rapid roll back of Covid restriction s in Ireland but impacts on work practices.

There is a newfound appreciation of the dairy category in terms of nutrition and production- hope this stays. Really have proven our economic and societal importance to the country over covid.

MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 15 MARCH 2022

Delegation: ITALY

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

➲ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-Nov 2021 / Jan-Nov 2020	What are your expectations for deliveries in Q1/22 compared to Q1/21?	What are your expectations for deliveries in Q2/22 compared to Q2/21?
+3,1 %	- (deliveries)	- (deliveries)
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q1/22?
Current milk price: 39,50 €/100kg (Dec) **fat 3,80%; proteins 3,30%**	Dec 21 / Dec 20: +10,0 %	- (prices)

➲ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Nov 2021 / Jan-Nov 2020	Expectations Q1/22 compared to Q1/21 (+ / - / stable)	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Dec 21 / Dec 20	Expectations Q1/22 compared to Q4/21 (+ / - / stable)	(Including stocks, consumption, etc…)
SMP	N.A.	N.A.	N.A.	N.A.	N.A.	
WMP	N.A.	N.A.	N.A.	N.A.	N.A.	
CHEESE	+5,9 %	-	-	-3,8 %	-	
BUTTER	+2,5 %	-	-	+130,9 %	-	
WHEY	NA	-	-	+62,9 %	-	

- **NATIONAL DAIRY OUTLOOK AND MARKET DEVELOPMENTS: Jan 2021 – Oct 2021**
- **ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION**
- **IMPACT OF COVID-19 ON THE DAIRY SECTOR**

Between January and November 2021, milk deliveries amounted to 11,95 million tons, marking a 3,1% increase with comparison to the same period in 2020. The quantities delivered in Lombardy accounted for the vast majority of the national total amount (45%).

Data regarding the specific product categories show how the increased supply in milk deliveries has resulted in an increased output of the main dairy items: +2,5% for butter (89,4 thousand tons), +11,1% for cream (136,4 thousand tons), +8,1% for drinking milk (2.266,6 thousand tons) and +5,9% for cheese (1.095,6 thousand tons). In November, dairy exports reached interesting growth levels (+14,2%), higher than the trend figure recorded in the first eleven months of the year (+10,7%). In particular, Grana Padano and Parmigiano Reggiano (+12%, an increase of almost one thousand tons), mozzarella (+13,4%), mascarpone (+34,3%) and provolone (+22,7%) performed significantly well. Sales of Asiago cheese, on the other hand, have continued to fall (-4,3%). Looking at the various countries, the EU market has confirmed its solidity. Exports of Italian cheeses, in fact, are continuing to show double-digit growth rates in France (+15,7%, a variation of more than one thousand tons), Spain (+34,8%), Belgium (+17,5%), the Netherlands (+32,8%) and Poland (+52,6%). Sales in Germany registered a modest increase (+2,8%), but in any event showed a recovery compared with the worrying figures registered in October.

Outside the EU, exports to the United Kingdom once again showed signs of a downturn (-2,8%, thus bringing the total to -3,5%), while sales to the United States are recovering after the negative performances of October (+5,9% in volume, +19,2% in value), as well as to Canada (+63,7% in volume, +100% in value). On the Asian market, sales dropped considerably in Japan (-25%) and China (-24,1%), while South Korea registered an interesting 21,7% increase.

The price of European gas in the period May-December 2021 recorded a variation equal to +502,87% compared to the same period of 2020, reaching 38$/tonne. Coal registered a variation equal to +120,14%; aluminium and corned marked – respectively – a 51,97% and 61,69% increase, while wheat showed a smaller growth rate (+12,73%). Such situation is threatening to seriously jeopardize activities in the energy-intensive sectors, and is exacerbated by the onerous cost of freight, which increased – always in the last eight months of the year – by 335%, going from an average of $1,990 to an average of $8,630.

In the light of the high volatility connected to the energy prices and the recent international tensions, it is not possible for us to make forecasts on productions and prices of the main dairy products.

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MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 15 MARCH 2022

Delegation: NL

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

MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-Dec 2021 / Jan-Dec 2020	What are your expectations for deliveries in Q1/22 compared to Q1/21?	What are your expectations for deliveries in Q2/22 compared to Q2/21?
-2,5%	Sustained reduction in milk deliveries, though at a slower pace than in Q4 2021 (ending up between -2% and -3%).	Stable to slightly reduced.
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q1/22?
Current milk price: 43,72 €/100kg (Dec)	Dec 21 / Dec 20: +24%	Tight supply-demand balance in the market remains. With market prices still rising, farm gate prices are expected to increase further.

DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Dec 2021 / Jan-Dec 2020	Expectations Q1/22 compared to Q1/21 (+ / - / stable)	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Dec 21 / Dec 20	Expectations Q1/22 compared to Q4/21 (+ / - / stable)	(Including stocks, consumption, etc…)
SMP	+24.6%*	n.a.	n.a.	+52%	n.a.	n.a.
WMP	-31.8%*	n.a.	n.a.	+49%	n.a.	n.a.
CHEESE	-2,0%	n.a.	n.a.	+24%	n.a.	n.a.
BUTTER	+5,0%	n.a.	n.a.	+76%	n.a.	n.a.
WHEY	+19,3%	n.a.	n.a.	+51%	n.a.	n.a.
**RVO data under investigation*						

NATIONAL DAIRY MARKET DEVELOPMENTS: January 2021 – Dec 2021
(e.g. industrial developments, domestic policy changes, external factors, exports)

Export development
Dutch export development in the period January till November 2021 was mainly positive. Export volumes of cheese (+3.1%), butter and butteroil (+3.2%), whole milk powder (+6.4%) and condensed milk (+3.1%) went up. Only exports of SMP (-3.4%) decreased during this period.

Political development
After more than 9 months of negotiations a new government in the Netherlands was formed. In the new coalition 4 parties will work together: VVD, D66, CDA and ChristenUnie. On the 15th of December they presented their coalition agreement. In this agreement they wrote what the government wants to do and achieve in the 2021-2025 government period. To reach the goal many billions are set aside and the new coalition agreement is one of the biggest investor-cabinets in years. Two highlights:
The Netherlands has to achieve 55% reduction CO2 emissions by 2030. In order to achieve the 55%-target the coalition will aim for a 60%-target to make sure that the reduction will be reached. The coalition agreement announced more stringent climate measures.
The new cabinet Rutte IV allocated 25 billion euros for agricultural transition. The Dutch government opts for an integrated approach to nitrogen, water quality, soil, climate and biodiversity. The goals set for nitrogen and nature must be reached five years earlier than said before. In 2030 the nitrogen emissions must be reduced by 50%. This policy and reduction targets will have a big impact on livestock numbers in the Netherlands, possibly leading to a decline of livestock by 30% (all animal types).
The new cabinet will elaborate on the coalition agreements in coming months.

Further increase of outdoor grazing
The number of dairy farms that apply outdoor grazing has increased to 84.0% (2020: 83.7%). The dairy sector aimed at 81.2 percent of dairy farms that apply outdoor grazing. The sector is well above that goal. Preserving pasture grazing is one of the seven themes of the Initiative Sustainable Dairy Chain.

Possible loss of derogation can lead to far-reaching measures for dairy sector
On the 25th of March the Dutch Minister of Agriculture presented additional measures in the action program nitrate of the Netherlands with the aim to improve water quality. With this revised package the Netherlands can start the procedure to apply for nitrates derogation. The coming month the Netherlands and the European Commission will negotiate about the conditions for the derogation. If derogation is not granted, the new cabinet has to take far-reaching measures in order to be compliant with the Nitrate directive.

Nitrogen excretion by dairy cattle below ceiling
Last year, dairy cattle (including young stock) excreted 277.7 million kg of nitrogen, 3.0 percent less than in 2020. This brought dairy livestock excretion of nitrogen below the manure production ceiling (of 281.8 million kg). It is the second time since the abolishment of the milk quota in 2015 that the dairy sector stayed below the production ceiling. With 73.7 million kg, phosphate excretion in the dairy farming sector stayed well below the production ceiling of 84.9 million kg. Production was virtually equal to 2020. The fact that nitrogen excretion decreased but phosphate excretion remained the same in the dairy sector is related to the composition of cattle feed.

Processing industry developments
-After a two-year planning battle the Supreme Court in Ireland has dismissed an appeal aimed at overturning planning permission for a €140 million Co Kilkenny continental cheese plant. The new factory will be developed under a joint venture between Glanbia Ireland and its Dutch partner Royal A-ware. The new factory is expected to start production in 2024.

- Vreugdenhil Dairy Foods took over the Putten-based company NutriDutch. Vreugdenhil plans to use this capacity expansion to focus primarily on the production of high-quality nutritional products. For example, specialties based on milk, whey and vegetable raw materials.

➲ NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2022)

(Trends, industrial changes, policy changes, **market expectations**)

Market expectations

At the moment, the impact on the market due to the crisis in Ukraine is uncertain. Milk supply development lags behind previous expectations for the coming period. Also, both within and outside the EU, no abundancy in supply is expected either. Meanwhile, demand is expected to remain reasonably good, including on the international market. As a result, the supply-demand situation for the short and medium term can be expected to remain rather tight, which suggests prices may remain firm for the coming period.

➲ NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2022)

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

➲ IMPACT OF COVID-19 ON THE DAIRY SECTOR

Please indicate and describe the potential ongoing effects of Covid-19 on prices, production, and internal market:

-

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MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 15 MARCH 2022

Delegation: POLAND+

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

MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-Dec 2021 / Jan-Dec 2020	What are your expectations for deliveries in Q1/22 compared to Q1/21?	What are your expectations for deliveries in Q2/22 compared to Q2/21?
+0,4%	increase (deliveries)	Jan 2022 vs. Jan 2021: +3,5% increase (deliveries), so it is probable that there will be increase in Q2 2002 compared to Q2 2021
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q1/22?
Current milk price: 34,7 €/100kg (Dec)	Dec 21 / Dec 20: +19,4%	Inflation in Poland drives prices up. (prices)

DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Dec 2021 / Jan-Dec 2020	Expectations Q1/22 compared to Q1/21 (+ / - / stable)	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Dec 21 / Dec 20	Expectations Q1/22 compared to Q4/21 (+ / - / stable)	(Including stocks, consumption, etc…)
SMP	-7,9%	+	+	+46%	+	Inflation in Poland drives prices up
WMP	+2%	+	+	+33%	+	Inflation in Poland drives prices up
CHEESE	+3,6%	+	+	+33%	+	Inflation in Poland drives prices up
BUTTER	-4,89%	+	+	+79%	+	Inflation in Poland drives prices up
WHEY	ND	ND	ND	+39%	+	Inflation in Poland drives prices up

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➲ NATIONAL DAIRY MARKET DEVELOPMENTS: January 2021 – Dec 2021
(e.g. industrial developments, domestic policy changes, external factors, exports)

CN	Exports (total incl. EU + 3rd countries)					
	Value ('000 EIU)		Value ('000 PLN)		Volume (tons)	
	2020	*2021.*	*2020.*	*2021.*	*2020.*	*2021.*
Total	**2 088 781**	**2 347 216**	**9 249 587**	**10 719 818**	**1 649 479**	**1 699 984**
0401	416 727	521 370	1 846 441	2 380 882	841 905	876 007
0402	324 618	337 037	1 437 720	1 538 832	154 691	139 037
0403	123 483	141 085	547 172	644 309	103 018	115 287
0404	195 941	214 451	866 841	979 442	225 381	232 872
0405	205 201	209 745	906 539	958 455	58 855	49 291
0406	822 811	923 527	3 644 874	4 217 898	265 630	287 490

➲ NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2022)
(Trends, industrial changes, policy changes, **market expectations**)

General price increse

➲ NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2022)

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

Production trends for main products: increase (due to increase of raw milk supply)

Consumption trends: stable

Exports (+/- and why?): increase due to production increase

➲ ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION

➲ IMPACT OF COVID-19 ON THE DAIRY SECTOR

Please indicate and describe the potential ongoing effects of Covid-19 on prices, production, and internal market:

Nothing to report.

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MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 15 MARCH 2022

Delegation: SPAIN

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

MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-Dec 2021 / Jan-Dec 2020	What are your expectations for deliveries in Q1/22 compared to Q1/21?	What are your expectations for deliveries in Q2/22 compared to Q2/21?
+ 0,9%	Slight increase	Slight increase
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q1/22?
Current milk price: 0,364€/L (Dec)	Dec 21 / Dec 20: + 7,1%	Increase

DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Dec 2021 / Jan-Dec 2020	Expectations Q1/22 compared to Q1/21 (+ / - / stable)	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Dec 21 / Dec 20	Expectations Q1/22 compared to Q4/21 (+ / - / stable)	(Including stocks, consumption, etc…)
SMP	N/A	N/A	N/A	N/A	N/A	N/A
WMP	N/A	N/A	N/A	N/A	N/A	N/A
CHEESE	N/A	N/A	N/A	N/A	N/A	N/A
BUTTER	N/A	N/A	N/A	N/A	N/A	N/A
WHEY	N/A	N/A	N/A	N/A	N/A	N/A

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➲ NATIONAL DAIRY MARKET DEVELOPMENTS: January 2021 – Dec 2021
(e.g. industrial developments, domestic policy changes, external factors, exports)

As expected, the consumption of dairy products at home has decreased during 2021 compared to 2020. The recovery of the HORECA channel was boost by the tourism (mainly local tourists). Positive expectations for HORECA in the coming months.

COVID19 aside, it is important to highlight these issues:

- High pressure of the farmers due to the increase of costs (energy and animal feed mainly). Demonstrations at processors headquarters and retailers' entrances asking for higher prices for some dairy products as UHT liquid milk.

- Only some minor movements of dairy products prices for consumers, spite of increasing costs and milk prices. Difficulties for processors and farmers.

- The "food value chain" law in Spain states that the production cost for farmers should be covered by the processor (not only in the dairy sector).

- Internal discussions about nutritional labelling systems (NutriScore). The Spanish Ministry of Agriculture is partially questioning NutriScore for some products, but other Ministries of the Government support it.

- New rules for CAP and financial support for dairy farmers.

- As a result of the Green Deal and F2F strategy, new environmental policies.

➲ NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2022)
(Trends, industrial changes, policy changes, **market expectations**)

New national / regional regulations on food health, advertising and nutrition are expected.

New national / regional regulations on sustainability, plastics, recycling waste, etc. are expected going beyond EU rules.

➲ NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2022)

Expected evolution in milk supply (+/-?):
Production trends for main products:
Consumption trends:
Exports (+/- and why?):

ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION

IMPACT OF COVID-19 ON THE DAIRY SECTOR

Please indicate and describe the potential ongoing effects of Covid-19 on prices, production, and internal market:

MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 15 MARCH 2022

Delegation: UK

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

➲ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-Dec 2021 / Jan-Dec 2020	What are your expectations for deliveries in Q1/22 compared to Q1/21?	What are your expectations for deliveries in Q2/22 compared to Q2/21?
+0.2% (leap-year-adjusted)	(deliveries)	(deliveries)
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q1/22?
Current milk price: 39.45 €/100kg (Dec)	Dec 21 / Dec 20: +21.0%	(prices)

➲ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Dec 2021 / Jan-Dec 2020 (Leap-year-adjusted)	Expectations Q1/22 compared to Q1/21 (+ / - / stable)	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Dec 21 / Dec 20	Expectations Q1/22 compared to Q4/21 (+ / - / stable)	(Including stocks, consumption, etc…)
SMP	Powder figures are not available split into WMP and SMP. Total powder production for Jan-Dec was 1.0% up on 2020			+39.6%		
WMP	n.a.			n.a.		
CHEESE	+3.0%			+22.4%		
BUTTER	+6.7%			+55.3%		
WHEY	n.a.			n.a.		

➲ NATIONAL DAIRY MARKET DEVELOPMENTS: January 2021 – Dec 2021
(e.g. industrial developments, domestic policy changes, external factors, exports)

After a slow start to the year, when exports were affected by adapting to the changes in EU regulation, UK dairy trade recovered to some extent but total volumes for the year were 10.9% down on 2020 at 1.17 million tonnes. All the main product categories experienced a drop in volumes with cheese exports 19.9% lower. Dairy imports were 2.6% lower over the course of 2021, compared to 2020.

Having started the year above the previous year, monthly milk production moved closer to 2020 levels as the year progressed and, from September onward, volumes have fallen increasingly behind last year as the rise from the trough has been slower than expected and yields have remained close to last year, rather than increasing slightly as had been forecast. Overall, on a leap-year-adjusted basis, milk production in 2021 was 0.2% up on 2020.

UK farmgate prices continue to far exceed 2020 levels with the January price the highest on record at 19.1% above last year, following on from 13.5 % in December. Whilst these higher prices are welcome, the corresponding higher input costs, especially feed, fertiliser and energy, have to be borne in mind so margins are restricted and this might affect future production growth, that is traditionally associated with higher farmgate prices.

Average wholesale prices for cream, butter, SMP and Cheddar cheese have moved strongly higher since August and into January 2022, on the back of a tight milk supply. Prices ended the year considerably higher than December 2020 with significant rises recorded for bulk cream (+78%), unsalted butter (+55%), SMP (+40%) and Mild Cheddar (up by 28% to a 10-year high).

The measures implemented earlier in the year to ease the labour shortage, such as a temporary relaxing of drivers' hours rules and issuing temporary visas to workers from overseas have eased the pressures on the supply chain slightly but the situation still remain a major concern.

The government will introduce legislation from October 2022 to restrict promotions of selected food and drink products by location and price in-store and online in England.

Locations restrictions will apply to store entrances, aisle ends and checkouts and their online equivalents. Volume price restrictions will prohibit retailers from offering promotions such as "buy-one-get-one-free" or "3 for 2" offers.

Products in scope of the regulations belong to 10 food categories which would also need to fail the nutrient profiling model used in the UK to identify foods high in fat, sugar or salt (HFSS). Dairy products which are subject to the restrictions are sweetened milk, sweetened yogurt, dairy desserts and ice creams.

The UK Soy Manifesto launched on 9th November 2021. Industry leaders representing 60% of UK soy imports voluntarily committed to deforestation and conversion-free soy by 2025 at the latest.

To provide a clear economic incentive for businesses to increase the recycled content within their plastic packaging, the UK is launching a new plastic packaging tax in April 2022. It is hoped that this will increase demand for recycled material, diverting more plastic waste away from landfill.

Dairy UK, alongside the NFU and AHDB Dairy, have incorporated the Global Methane Pledge into the Dairy Roadmap, as part of its Climate Ambition. The Dairy Roadmap Climate Ambition outlines the industry's intent to support the globally recognised goal to limit global temperature rise to 1.5 ºC, and the UK government's commitment to Net-Zero by setting a minimum standard for improvement across the industry.

The Department for Environment, Food and Rural Affairs published the 'Family Food' report, an annual publication which provides detailed statistical information on purchased quantities, expenditure and nutrient intakes derived from both household and eating out food and drink. In terms of dairy, household purchases of whole milk have declined over time, from 1974 to 2019/20, whereas semi-skimmed milk has increased significantly. Based on household purchases, the average person currently purchases 194ml of milk or milk drinks per day, and 28g of yogurt or fromage frais per day. Household cheese purchases have increased in the UK since records began, with current purchases estimated at 18g per person per day.

➲ NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2022)

(Trends, industrial changes, policy changes, **market expectations**)

The recent higher farmgate milk prices will continue into the early months of 2022 with further significant increases for January and February announced by the major milk purchasers on the back of the higher market returns for dairy products that continue to be seen since August 2020.

➲ NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2022)

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

Production trends for main products:

Consumption trends:

Exports (+/- and why?):

➲ ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION

➲ IMPACT OF COVID-19 ON THE DAIRY SECTOR

Please indicate and describe the potential ongoing effects of Covid-19 on prices, production, and internal market:

MARKET SITUATION

BY M. WOHLFARTH, ZMB

Market Information
for the
EDA Trade & Economics Committee
March 2022

The Dairy Market in General

Table 1

EU Dairy Markets Summary

in '000 t	2017 EU-28	2018 EU-28	2019[1)] EU-28	2020[2)] EU-28	2020[2)] EU-27	2021[2)] EU-27	2022[2)] EU-27
Dairy Cows (December census, '000head)	*23.313*	*22.908*	*22.633*	*22.421*	*20.565*	*20.350*	*20.200*
Milk Deliveries to dairies	*155.887*	*157.350*	*158.283*	*160.629*	*145.204*	*144.756*	*145.600*
Milk for liquid consumption	*30.939*	*30.310*	*29.684*	*30.228*	*23.887*	*23.700*	*23.500*
Fermented Products and Desserts	*10.205*	*10.237*	*10.300*	*10.350*	*9.950*	*9.950*	*9.950*
Butter							
Production[3)]	*2.308*	*2.342*	*2.402*	*2.448*	*2.254*	*2.200*	*2.200*
Consumption	*2.155*	*2.151*	*2.180*	*2.215*	*1.997*	*2.005*	*2.040*
Cheese							
Production[4)]	*10.610*	*10.726*	*10.904*	*11.060*	*10.572*	*10.670*	*10.790*
Consumption[5)]	*9.850*	*9.932*	*10.107*	*10.180*	*9.382*	*9.500*	*9.560*
Skim Milk Powder							
Production	*1.689*	*1.671*	*1.668*	*1.706*	*1.628*	*1.560*	*1.540*
Consumption	*910*	*950*	*960*	*950*	*900*	*875*	*865*
Whole Milk Powder production	*835*	*840*	*860*	*870*	*858*	*810*	*830*
Condensed Milk production	*1.080*	*1.070*	*1.135*	*1.212*	*1.082*	*1.080*	*1.080*
Skim Milk used for Casein	*5.550*	*5.700*	*5.710*	*5.730*	*5.700*	*5.800*	*5.800*
Population (million head)	*511*	*512*	*513*	*514*	*447*	*448*	*448*

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.

Remark: UK remained part of the single market during 2020.

Source: ZMB Berlin, Germany

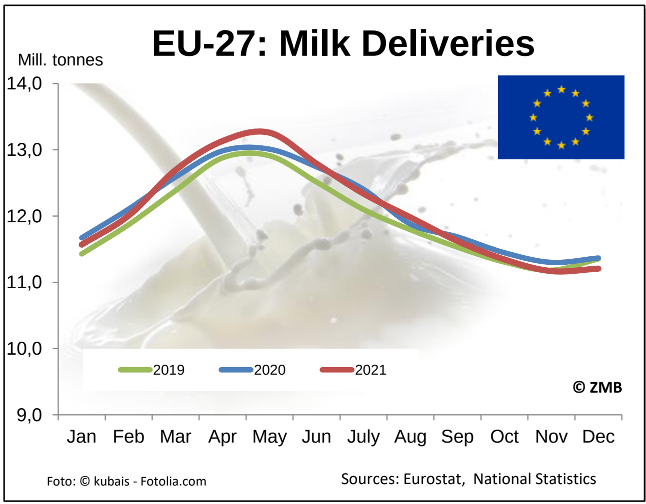
Updated February 2022

Milk Supplies
Table 2

EU: Cow Milk Deliveries to Dairies

´000 tonnes	2016	2017	2018	2019	2020	2021x	Forecast 2022
EU 27_2020	138.727	140.738	142.158	142.850	145.204	144.756	**145.618**
EU 28	**153.273**	**155.887**	**157.350**	**158.283**	**160.656**	**160.203**	161.118
EU 27_2007	152.783	155.411	156.897	157.848	160.222	159.774	160.683
EU 25	151.306	153.804	155.134	156.071	158.393	157.969	158.863
EU 15	131.075	132.998	134.027	134.714	136.473	135.922	136.550
EU 10	9.103	9.153	9.144	9.174	9.486	9.566	9.713
EU 2	1.477	1.607	1.763	1.777	1.829	1.805	1.820
Belgium	3.789	3.925	4.079	4.177	4.329	4.308	4.400
Bulgaria	524	579	643	652	694	679	680
Czech Rep.	2.960	2.984	3.057	3.034	3.192	3.129	3.100
Denmark	5.373	5.494	5.615	5.615	5.666	5.644	5.650
Germany	31.973	31.937	32.491	32.442	32.552	31.942	31.800
Estonia	727	727	748	763	788	799	800
Greece	619	603	621	633	652	660	680
Spain	6.939	7.028	7.117	7.251	7.409	7.478	7.600
France	24.508	24.579	24.589	24.535	24.584	24.208	24.400
Ireland	6.853	7.480	7.813	8.226	8.545	9.017	9.300
Italy	11.490	11.902	12.071	12.117	12.668	13.057	13.300
Cyprus	197	216	228	239	274	298	330
Latvia	814	832	781	785	791	813	830
Lithuania	1.417	1.403	1.367	1.358	1.360	1.349	1.400
Luxembourg	362	374	395	409	435	445	450
Hungary	1.547	1.545	1.535	1.576	1.626	1.727	1.750
Croatia	490	477	453	436	434	429	435
Malta	43	41	40	41	43	40	43
Netherlands	14.324	14.296	13.881	13.802	13.987	13.599	13.300
Austria	3.198	3.200	3.183	3.140	3.137	3.154	3.150
Poland	11.128	11.652	11.963	12.183	12.434	12.481	12.600
Portugal	1.849	1.848	1.867	1.899	1.923	1.909	1.920
Romania	953	1.028	1.120	1.125	1.135	1.126	1.140
Slovenia	575	579	571	564	580	589	620
Slovakia	823	826	817	814	834	823	840
Finland	2.390	2.366	2.354	2.330	2.362	2.272	2.300
Sweden	2.862	2.817	2.760	2.704	2.773	2.782	2.800
UK	*14.547*	*15.149*	*15.193*	*15.433*	*15.452*	*15.447*	*15.500*

Source: ZMB, national statistics, Eurostat, European Commission. *Updated February 2022*



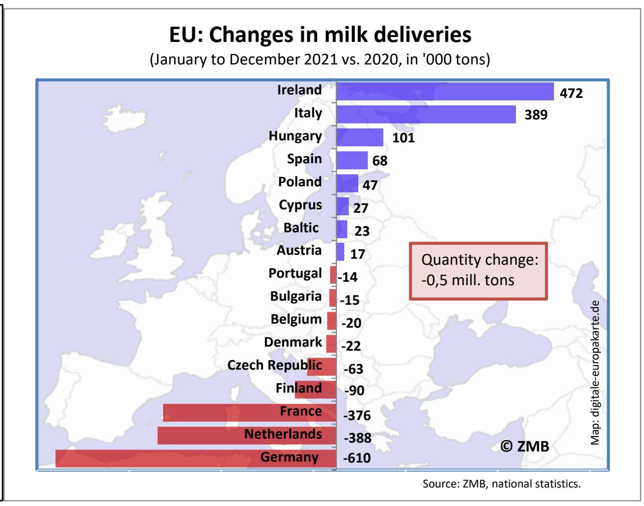


Table 3

EU Milk Deliveries	January - December			Dec.
000 t	**2020**	**2021***	**21:20 ****	**21:20 ***
Belgium	4.328	4.308	- 0,2%	- 0,9%
Bulgaria	694	679	- 1,9%	- 7,7%
Czech Rep.	3.192	3.129	- 1,7%	+ 0,2%
Denmark	5.667	5.644	- 0,1%	- 1,7%
Germany	32.552	31.942	- 1,6%	- 2,9%
Baltic States	2.938	2.961	+ 1,1%	+ 3,7%
Greece	652	660	+ 1,5%	- 0,8%
Spain	7.410	7.478	+ 1,2%	+ 0,3%
France	24.584	24.208	- 1,3%	- 2,7%
Ireland	8.545	9.017	+ 5,8%	- 1,0%
Italy	12.668	13.056	+ 3,4%	.
Croatia	434	429	- 0,9%	- 4,3%
Hungary	1.626	1.727	+ 6,5%	+ 5,5%
Netherlands	13.987	13.599	- 2,5%	- 4,2%
Austria	3.137	3.154	+0,8%	+ 3,7%
Poland	12.434	12.481	+ 0,7%	+1,3%
Portugal	1.923	1.909	- 0,4%	-2,1%
Romania	1.135	1.126	- 0,5%	-4,4%
Slovenia	580	589	+ 1,8%	-0,4%
Slovakia	834	823	- 1,0%	+0,1%
Finland	2.362	2.272	- 3,6%	-3,6%
Sweden	2.773	2.782	+ 0,6%	-2,7%
EU-27	**145.178**	**144.720**	- 0,0%	-1,4%

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

Sources: ZMB, national statistics. **© ZMB**

Table 4

Milk Output in different countries				
000 t	**January-**	**2020**	**2021***	**21:20****
U. Kingdom	Dec.	15.452	15.447	+0,2%
Switzerland	Dec.	3.396	3.405	+0,5%
Norway	Sep.	1.151	1.187	+3,6%
Bosnia/Herzeg.	Nov.	249	258	+3,6%
Serbia	Dec.	908	892	-1,5%
Europe without EU	cum.	21.156	21.189	.
Russia [1)]	Dec.	32.225	32.297	+0,5%
Belarus [1)]	Dec.	7.509	7.588	+1,3%
Kasachstan [1)]	Dec.	6.004	6.198	+3,5%
Ukraine [1)]	Dec.	9.264	8.719	-5,6%
4 CIS countries	cum.	55.002	54.802	.
Canada	Dec.	9.611	9.759	+1,8%
USA [1)]	Dec.	101.293	102.631	+1,3%
Mexico	Dec.	12.930	13.253	+2,8%
North America	cum.	123.834	125.643	.
Argentina [1)]	Dec.	11.447	11.900	+4,0%
Brazil	Dec.	26.329	25.615	-2,4%
Chile	Dec.	2.344	2.337	-0,0%
Uruguay	Dec.	2.140	2.178	+2,1%
Peru	Nov.	1.963	2.020	+3,2%
South America	cum.	44.222	44.050	.
Australia [1)]	Dec.	9.099	9.019	-0,6%
New Zealand [1)]	Dec.	21.871	21.884	+0,1%
Oceania	cum.	30.970	30.903	.
Asian countries:				
Türkei	Dec.	9.841	10.067	+2,6%
Japan	Dec.	7.438	7.591	+2,3%

1) Milk production *) Provisional/ Estimate. **) Adjusted for leap day.

Sources: ZMB, national statistics. **© ZMB**

Table 5

EU-27: Production of Dairy Products				
	January - December			**Dec.**
000 t	**2020**	**2021***	**21:20 ***	**21:20 ***
Liquid milk	23.748	23.582	- 0,7%	- 1,3%
Cream	2.425	2.490	+ 2,7%	+ 4,3%
Fermented Products	8.666	8.626	- 0,5%	- 0,6%
Butter	2.180	2.114	- 3,0%	- 5,6%
Cheese	9.285	9.424	+ 1,5%	+ 0,2%
WMP etc.	720	643	- 10,7%	- 17,1%
SMP	1.580	1.488	- 5,8%	- 13,5%
Condensed milk	971	977	+ 0,6%	+ 12,8%

***) Provisional.**

Sources: ZMB, Eurostat, national statistics. **© ZMB**

Table 6

EU Balance Sheet of Milk for Liquid Consumption						
'000 t	**2018 EU 28**	**2019 EU28**	**2020* EU 28**	**2020* EU-27**	**2021* EU-27**	**2022** EU-27**
Production	**30.310**	**29.684**	**30.228**	**23.887**	**23.700**	**23.500**
Imports	4	6	9	95	90	100
Exports	727	892	1.004	1.049	1.200	1.300
Sales	**29.587**	**28.798**	**29.233**	**22.933**	**22.590**	**22.300**
Per capita (kg)	**57,7**	**56,1**	**56,8**	**51,3**	**50,4**	**49,8**

*)Provisional **) Estimation/Forecast.

Remark: UK was part of the single market during 2020. Updated February 2022

Source: ZMB

Table 7

EU Butter Balance Sheet						
'000 t	**2018** EU 28	**2019** EU28	**2020*** EU 28	**2020*** EU-27	**2021* EU-27**	**2022** EU-28**
Initial stocks	90	140	160	146	135	120
Total production	**2.342**	**2.402**	**2.448**	**2.254**	**2.220**	**2.200**
- in dairies[1)]	2.322	2.382	2.428	2.234	2.200	2.180
- on farms	20	20	20	20	20	20
Imports	22	15	4	52	50	50
-thereof from UK	.	.	.	47	40	30
Exports	**163**	**218**	**247**	**320**	**260**	**230**
-thereof to UK	**.**	**.**	**.**	**79**	**50**	**50**
Final stocks	140	160	150	135	120	100
thereof public stocks	0	0	0	0	0	0
Disappearance	**2.151**	**2.180**	**2.215**	**1.997**	**2.025**	**2.040**
Per capita (kg)	**4,2**	**4,2**	**4,3**	**4,5**	**4,5**	**4,5**

*)Provisional **) Forecast. 1)incl. butteroil.

Remark: UK was part of the single market during 2020.

Source: ZMB Updated February 2022

Table 8

EU Cheese Balance Sheet						
'000 t	**2018** EU 28	**2019** EU28	**2020*** EU 28	**2020*** EU-27	**2021* EU-27**	**2022** EU-27**
Production	**10.546**	**10.724**	**10.890**	**10.417**	**10.510**	**10.630**
- from cows' milk in dairies	9.526	9.744	9.910	9.437	9.520	9.640
- on farms	100	100	100	100	100	100
- from other milk	920	880	880	880	890	890
Imports	59	63	63	222	200	200
-thereof from UK	.	.	.	160	130	130
Processing addition[1)]	180	180	170	155	160	160
Available	10.785	10.967	11.123	10.793	10.870	10.990
Exports	**833**	**880**	**943**	**1.402**	**1.390**	**1.430**
-thereof to UK	.	.	.	493	430	440
Stock Change	20	-20	0	10	-20	0
Consumption	**9.932**	**10.107**	**10.180**	**9.382**	**9.500**	**9.560**
- per capita (kg)	**19,4**	**19,7**	**19,8**	**21,0**	**21,2**	**21,3**

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

Remark: UK was part of the single market during 2020.

Source: ZMB Updated February 2022

Table 9

EU Balance Sheet of Condensed Milk						
'000 t	2018 EU 28	2019 EU28	2020* EU 28	2020* EU-27	2021* EU-27	2022** EU27
Production	**1.070**	**1.135**	**1.212**	**1.082**	**1.080**	**1.080**
Imports	1	1	1	34	36	30
-thereof from UK						
Exports	**276**	**276**	**279**	**338**	**340**	**350**
-thereof to UK						
Change in stocks	0	15	30	30	0	0
Consumption	**795**	**845**	**904**	**747**	**776**	**760**

*)Provisional **) Forecast.

Remark: UK was part of the single market during 2020.

Source: ZMB

Updated February 2022

Table 10

EU SMP Balance Sheet						
'000 t	2018 EU 28	2019 EU28	2020* EU 28	2020* EU-27	2021* EU-27	2022** EU-27
Opening stocks	540	448	199	195	128	56
Production	**1.671**	**1.668**	**1.706**	**1.628**	**1.560**	**1.540**
Imports	4	6	2	36	33	20
-thereof from UK	.	.	.	34	23	18
Available	2.214	2.121	1.907	1.859	1.721	1.616
Consumption	**950**	**960**	**950**	**900**	**875**	**865**
- other than feed	790	800	810	770	765	765
- in feed	160	160	140	130	110	100
Exports	**816**	**962**	**828**	**831**	**790**	**700**
-thereof to UK	.	.	.	28	15	10
Ending stocks	448	199	129	128	56	51
- in intervention	176	0	0	0	0	0

*)Provisional **) Forecast.

Remark: UK was part of the single market during 2020.

Updated February 2022

Source: ZMB

Table 11

EU Whey Powder Balance Sheet					
'000 t	2019*	2020**	2020**	2021**	2022**
	EU 28	**EU 28**	**EU 27**	**EU 27**	**EU 27**
Production	**2.180**	**2.180**	**2.125**	**2.200**	**2.250**
Imports	22	15	52	45	40
-thereof from UK	.	.	37	31	30
Exports	598	651	691	720	730
-thereof to UK	.	.	56	40	40
Stock change	60	0	-30	-20	0
Consumption	1.544	1.544	1.516	1.545	1.560

Partly desugared and demineralised whey powder included.

*) Estimated. **) Forecast.

Source: ZMB

Updated February 2022

Table 12

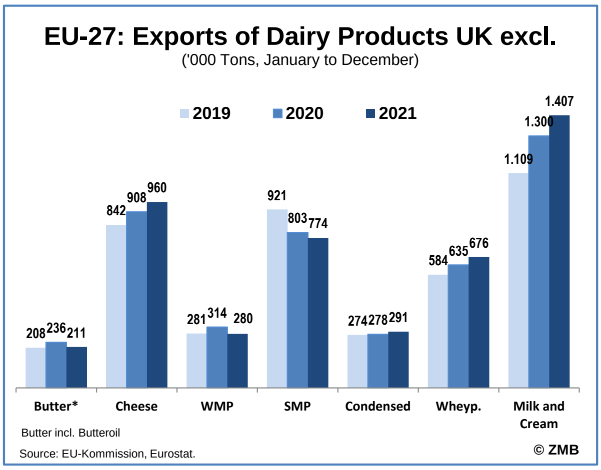
EU Casein Balance Sheet					
'000 t	2019*	2020**	2020**	2021**	2022**
	EU 28	**EU 28**	**EU 27**	**EU 27**	**EU 28**
Production1)	**172**	**175**	**177**	**182**	**182**
Import	18	17	15	15	13
-thereof from UK	.	.	3	2	2
Exports	92	92	95	105	98
-thereof to UK	.	.	4	4	4
Stock change2)	2	0	-2	-8	0
Consumption	96	100	99	100	97

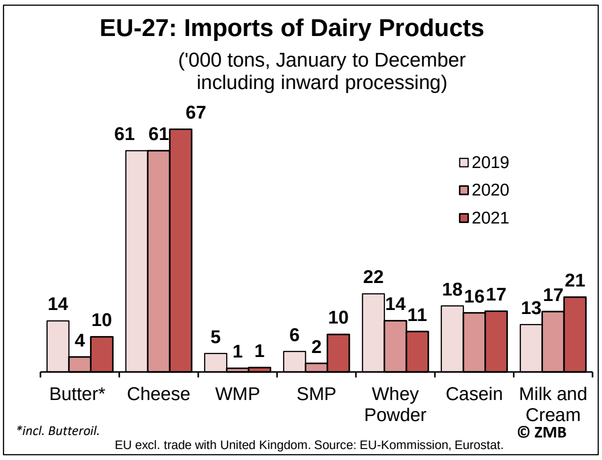
*) Estimated. **) Forecast. 1) Partly estimated.

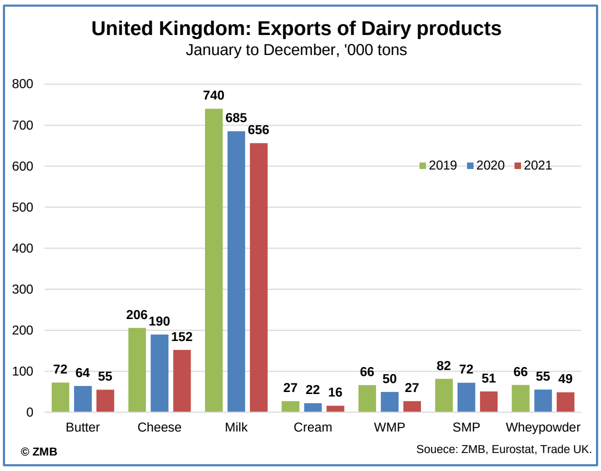
2) Total stocks (manufacturers and users)

Updated February 2022

Source: ZMB







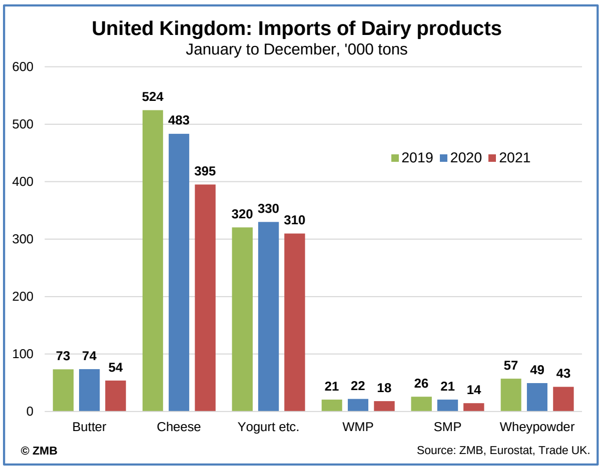


Table 13

EU: Exports of Butter <85%[1)]

' 000 t	Months	2019	2020	Months	2020	2021	Months	2020	2021
		EU-27[2)]	EU-27[2)]		EU-27[3)]	EU-27[3)]		Export to UK	
Belgium	12	13,9	18,1	12	15,9	11,1	11	1,6	1,1
Denmark	12	27,7	29,3	12	21,9	22,3	11	7,2	6,4
Germany	12	18,1	14,1	12	14,2	13,3	11	0,5	0,1
Spain	12	1,0	1,8	12	1,7	1,7	11	0,0	0,0
France	12	40,3	41,4	12	35,2	38,3	11	4,6	4,5
Ireland	12	97,2	98,3	12	54,4	48,3	11	33,8	26,1
Lithuania	12	1,9	4,8	12	4,6	1,0	11	0,1	0,0
Netherlands	12	30,9	32,3	12	27,3	26,4	11	3,1	0,4
Portugal	12	2,2	6,7	12	4,9	4,6	11	0,0	0,0
Poland	12	7,5	13,1	12	11,8	5,7	11	1,0	1,0
Finland	12	4,4	5,3	12	5,5	4,6	11	0,0	0,0
All other	12	2,5	4,1	12	4,2	3,8	11	0,1	0,1
EU	**12**	**247,4**	**269,3**	12	**201,6**	**181,1**	11	**52,0**	**39,7**

1) To countries outside EU. 2) Incl. trade with UK. 3) Excl. trade with UK.

Sources: ZMB, EU-Comm./ EUROSTAT.

Table 14

EU: Exports of Butter > 85 % (AMF, etc.)[1)]

' 000 t	Months	2019	2020	Months	2020	2021	Months	2020	2021
		EU-27[2)]	EU-27[2)]		EU-27[3)]	EU-27[3)]		Export to UK	
Belgium	12	5,5	4,4	12	4,0	3,3	11	0,9	0,8
Spain	12	0,7	0,6	12	0,6	0,4	11	0,0	0,0
France	12	7,2	6,8	12	7,6	7,7	11	0,2	0,2
Ireland	12	9,2	5,6	12	1,5	0,4	11	5,1	3,6
Netherlands	12	18,6	19,2	12	13,5	10,5	11	6,7	1,6
Sweden	12	0,0	0,0	12	0,0	0,0	11	.	0,0
All other	12	2,6	2,2	12	4,1	2,9	11	0,2	0,3
EU	**12**	**43,8**	**38,8**	**12**	**31,3**	**25,2**	**11**	**13,2**	**6,6**

1) To countries outside EU. 2) Incl. trade with UK. 3) Excl. trade with UK.
Sources: ZMB, EU-Comm./ EUROSTAT.

Table 15

EU: Imports of Butter and Butteroil[1)]

' 000 t	Months	2019	2020	Months	2020	2021	Months	2020	2021
		EU-27[2)]	EU-27[2)]		EU-27[3)]	EU-27[3)]		Import from UK	
Belgium	12	29,5	18,9	12	0,0	0,0	11	17,0	11,9
Denmark	12	5,6	2,8	12	1,9	6,1	11	0,8	0,5
France	12	6,9	3,9	12	1,2	2,1	11	2,5	6,3
Netherlands	12	10,3	8,7	12	0,4	1,1	11	7,4	9,6
All other	12	24,2	17,6	12	0,7	0,5	11	15,5	10,0
EU	12	**76,6**	**51,9**	**12**	**4,2**	**9,7**	**11**	**43,3**	**38,3**

1) From 3rd countries. 2) Incl. trade with UK. 3) Excl. trade with UK.
Sources: ZMB, EU-Comm./ EUROSTAT.

Table 16

Exports of Butter and Butteroil

1.000 tonnes	Mon.	2019	2020	2021	± %
*EU - 27**	*I - XII*	*208,3*	*236,5*	*211,3*	*- 10,7*
United Kingdom	*I - XII*	*72,2*	*64,2*	*55,1*	*- 14,1*
- of which to EU-27	*I - XII*	*64,9*	*53,9*	*48,3*	*- 10,3*
New Zealand	I - XII	461,2	423,3	394,4	- 6,8
Australia	I - XII	16,8	15,2	20,7	+ 36,1
USA	I - XII	25,4	26,9	60,1	+ 123,3
Switzerland	I - XII	0,2	0,3	0,1	- 63,6
Belarus	I - XII	78,3	68,8	77,8	+ 13,2
Ukraine	I - XI	15,2	8,5	8,0	- 6,1
Argentina	I - XII	15,0	20,7	30,4	+ 46,9
Uruguay	I - XII	13,1	13,7	12,4	- 9,1
India	I - XI	41,5	15,9	17,8	+ 12,4
Total amount*		882,3	840,1	839,9	- 0,0

* Excluding trade between EU-27 and United Kingdom.

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

Table 17

EU: Exports of Cheese[1)]

' 000 t	Months	2019	2020	Months	2020	2021	Months	2020	2021
		EU-27[2)]	EU-27[2)]		EU-27[3)]	EU-27[3)]		Export to UK	
Belgium	12	44,4	50,0	12	25,1	21,5	11	22,6	42,9
Bulgaria	12	7,9	8,2	12	6,9	8,5	11	1,3	1,5
Czech Rep.	12	5,6	5,1	12	3,9	7,5	11	1,1	0,9
Denmark	12	126,1	137,3	12	84,3	94,4	11	47,3	39,4
Greece	12	22,4	24,1	12	11,5	13,6	11	12,0	10,8
Spain	12	33,9	25,9	12	23,1	25,2	11	2,4	3,6
Germany	12	205,2	222,8	12	153,2	163,5	11	63,8	44,6
France	12	203,1	186,4	12	110,4	118,6	11	70,5	54,7
Ireland	12	207,5	203,5	12	71,7	70,8	11	117,6	87,9
Italy	12	149,8	147,1	12	105,9	122,0	11	37,2	36,1
Lithuania	12	16,0	17,2	12	4,0	2,5	11	0,8	0,5
Hungary	12	11,9	13,8	12	16,3	16,5	11	1,3	1,6
Netherlands	12	174,8	191,6	12	159,6	164,2	11	28,6	26,3
Austria	12	20,6	21,7	12	20,3	20,1	11	1,3	1,6
Poland	12	67,7	88,5	12	71,6	69,5	11	15,4	16,4
Finland	12	6,3	6,4	12	6,3	5,3	11	0,0	0,0
All other	12	44,5	51,1	12	34,4	36,1	11	23,5	23,0
EU	**12**	**1.347,8**	**1.400,8**	**12**	**908,5**	**959,8**	11	**446,7**	**391,8**

1) To countries outside EU. 2) Incl. trade with UK. 3) Excl. trade with UK.

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 18

Exports of Cheese

1.000 tonnes	Mon.	2019	2020	2021	± %
EU - 27*	I - XII	841,7	908,5	959,8	+ 5,6
United Kingdom	I - XII	205,5	189,6	152,3	- 19,7
- of which to EU-27	I - XII	168,0	155,5	116,3	- 25,2
Switzerland	I - XII	75,9	77,1	82,5	+ 6,9
New Zealand	I - XII	334,9	327,0	358,5	+ 9,6
Australia	I - XII	160,0	153,1	158,8	+ 3,8
USA	I - XII	356,5	355,4	404,7	+ 13,9
Belarus	I - XII	244,1	274,5	298,3	+ 8,7
Argentina	I - XII	61,4	69,8	77,7	+ 11,5
Uruguay	I - XII	25,6	27,5	26,0	- 5,3
Turkey	I - XII	55,1	53,5	41,1	- 23,2
Total amount*		2.192,5	2.280,4	2.443,4	+ 7,1

* Excluding trade between EU-27 and United Kingdom.

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

Table 19

EU: Exports of Condensed and Evaporated Milk1)

' 000 t	Months	2019	2020	Months	2020	2021	Months	2020	2021
		EU-27 2)	EU-27 2)		EU-27 3)	EU-27 3)		Export to UK	
Belgium	12	28,9	26,7	12	7,3	13,8	11	16,7	16,2
Germany	12	70,5	65,9	12	48,4	48,6	11	16,0	8,6
Spain	12	25,1	27,6	12	23,0	25,4	11	4,4	1,5
France	12	2,2	3,1	12	1,2	1,1	11	1,8	0,1
Litauen	12	8,1	11,8	12	11,0	14,9	11	0,8	0,5
Netherlands	12	189,7	193,0	12	181,0	180,2	11	11,0	15,3
Poland	12	4,0	4,7	12	2,0	1,0	11	2,2	1,9
All other	12	3,6	5,1	12	4,0	6,2	11	1,2	0,9
EU	**12**	**332,1**	**337,8**	**12**	**277,9**	**291,2**	**11**	**53,9**	**45,0**

1) To countries outside EU. 2) Incl. trade with UK. 3) Excl. trade with UK.

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 20

EU: Exports of Whole Milk Powder1) 2)

' 000 t	Months	2019	2020	Months	2020	2021	Months	2020	2021
		EU-27 3)	EU-27 3)		EU-27 4)	EU-27 4)		Export to UK	
Belgium	12	28,9	48,1	12	44,3	24,4	11	3,4	0,2
Czech Rep.	12	3,8	2,9	12	2,9	2,4	11	0,0	0,0
Denmark	12	46,7	43,3	12	43,3	48,5	11	0,0	0,0
Germany	12	17,2	19,2	12	12,9	12,6	11	5,9	1,1
France	12	35,1	39,9	12	31,6	34,4	11	7,4	7,5
Ireland	12	30,7	44,0	12	38,4	26,4	11	4,7	4,4
Netherlands	12	115,1	109,2	12	104,1	96,0	11	4,9	2,7
Poland	12	6,1	8,4	12	8,0	5,1	11	0,4	0,1
Sweden	12	18,1	19,4	12	19,4	20,4	11	0,0	0,0
All other	12	13,7	10,3	12	9,5	9,5	11	0,8	0,6
EU	12	**315,4**	**344,9**	12	**314,4**	**279,7**	11	**27,6**	**16,7**

1) To countries outside EU. 2) Incl. partly skimmed milk powder. 3) Incl. trade with UK. 4) Excl. trade with UK.

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 21

Exports of Whole Milk Powder

1.000 tonnes	Mon.	2019	2020	2021	± %
EU - 27*	I - XII	281,5	314,4	279,7	- 11,0
United Kingdom	I - XII	66,3	49,5	27,3	- 45,0
- of which to EU-27	I - XII	50,2	32,3	9,4	- 71,0
New Zealand	I - XII	1.535,7	1.532,6	1.619,5	+ 5,7
Australia	I - XII	41,7	36,8	51,5	+ 40,0
USA	I - XII	34,0	35,4	35,3	- 0,3
Belarus	I - XII	22,7	27,2	37,3	+ 37,4
Argentina	I - XII	96,6	148,3	145,1	- 2,2
Uruguay	I - XII	131,5	146,7	141,2	- 3,8
Total amount*		2.159,8	2.258,6	2.327,6	+ 3,1

*** Excluding trade between EU-27 and United Kingdom.**

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

Table 22

EU: Exports Skim Milk Powder[1)]

' 000 t	Months	2019	2020	Months	2020	2021	Months	2020	2021
		EU-27[2)]	EU-27[2)]		EU-27[3)]	EU-27[3)]		Export to UK	
Belgium	12	190,6	150,9	12	148,4	138,9	11	2,2	0,3
Czech Rep.	12	11,7	10,9	12	10,9	9,9	11	0,0	0,0
Denmark	12	17,0	12,4	12	12,4	7,9	11	.	.
Germany	12	168,5	142,0	12	135,6	116,6	11	5,8	0,3
Spain	12	19,3	10,6	12	10,5	12,6	11	0,0	0,0
France	12	172,9	158,5	12	156,2	162,6	11	2,1	2,2
Ireland	12	97,8	96,6	12	82,6	87,0	11	13,0	9,4
Latvia	12	1,0	0,5	12	0,5	0,4	11	0,0	0,0
Lithuania	12	20,8	18,3	12	18,3	13,6	11	.	.
Netherlands	12	100,4	85,2	12	83,9	78,8	11	1,3	0,6
Poland	12	84,8	80,4	12	80,2	71,7	11	0,2	0,0
Finland	12	31,3	36,4	12	36,4	37,0	11	.	.
Sweden	12	19,4	18,7	12	18,6	32,3	11	0,1	0,0
All other	12	9,9	8,9	12	8,6	5,1	11	0,3	0,1
EU	**12**	**945,5**	**830,3**	**12**	**803,1**	**774,4**	11	**24,9**	**13,0**

1) To countries outside EU. 2) Incl. trade with UK. 3) Excl. trade with UK.

Sources: ZMB, EU-Comm./ EUROSTAT.

Table 23

Exports of Skim Milk Powder

1.000 tonnes	Mon.	2019	2020	2021	± %
EU - 27*	I - XII	921,1	803,1	774,4	- 3,6
United Kingdom	I - XII	81,6	72,0	50,7	- 29,5
- of which to EU-27	I - XII	41,1	46,1	26,2	- 43,2
New Zealand	I - XII	372,9	356,3	325,9	- 8,5
Australia	I - XII	127,6	128,6	157,1	+ 22,2
USA	I - XII	700,9	810,2	892,5	+ 10,2
Canada	I - XII	46,7	39,5	18,4	- 53,3
Turkey	I - XII	40,7	20,2	60,8	+ 201,3
Belarus	I - XII	123,4	123,5	120,1	- 2,8
Argentina	I - XII	22,0	27,7	20,8	- 24,7
Uruguay	I - XII	21,3	20,8	19,6	- 5,7
Total amount*		2.417,0	2.355,7	2.414,3	+ 2,5

* Excluding trade between EU-27 and United Kingdom.

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

Table 24

EU: Exports of Whey Powder[1)]

1.000 t	Months	2019	2020	Months	2020	2021	Months	2020	2021
		EU-27[2)]	EU-27[2)]		EU-27[3)]	EU-27[3)]		Export to UK	
Belgium	12	10,2	8,8	12	8,7	4,6	11	0,1	0,1
Czech Rep.	12	24,1	23,2	12	23,2	26,5	11	0,0	.
Denmark	12	10,0	10,3	12	10,3	8,0	11	.	.
Germany	12	114,1	112,0	12	102,9	114,7	11	8,5	5,8
Estonia	12	2,7	2,5	12	2,5	1,8	11	.	0,0
Spain	12	20,9	24,8	12	24,3	29,4	11	0,4	0,2
France	12	156,7	155,3	12	151,5	189,1	11	3,4	1,3
Ireland	12	74,5	81,6	12	47,1	53,1	11	29,5	25,4
Latvia	12	8,8	6,5	12	6,9	7,5	11	.	0,0
Lithuania	12	15,5	20,8	12	20,8	21,1	11	0,0	0,3
Netherlands	12	62,7	81,8	12	75,6	69,3	11	6,1	1,2
Austria	12	4,5	4,9	12	4,5	2,4	11	0,3	0,0
Poland	12	98,7	120,3	12	120,2	107,9	11	0,2	0,0
Finland	12	14,1	17,8	12	17,8	16,9	11	.	0,0
Other	12	20,6	20,2	12	19,5	23,9	11	0,4	1,3
EU	12	**638,1**	**690,8**	**12**	**635,8**	**676,2**	11	**49,0**	**35,6**

1) To countries outside EU. 2) Incl. trade with UK. 3) Excl. trade with UK.

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 25

Exports of Whey Powder					
tonnes	Mon.	2019	2020	2021	± %
EU - 27*	I - XII	584.342	635.783	676.195	+ 6,4
United Kingdom	I - XII	66.444	55.398	48.953	- 11,6
- of which to EU-27	I - XII	51.785	40.587	34.317	- 15,4
USA (Whey products)	I - XII	400.852	498.486	549.849	+ 10,3
- Whey Powder	*I - XII*	*153.539*	*214.169*	*225.281*	*+ 5,2*
- WPC	*I - XII*	*124.349*	*146.970*	*135.730*	*- 7,6*
- Mod Whey	*I - XII*	*122.963*	*137.347*	*188.838*	*+ 37,5*
Australia	I - XII	29.952	32.079	30.973	- 3,4
Argentina	I - XII	58.073	52.225	61.730	+ 18,2
Ukraine	I - XI	21.560	23.771	20.205	- 15,0
Canada	I - XII	64.175	73.436	65.476	- 10,8
Turkey	I - XII	57.264	66.084	85.275	+ 29,0
Total amount*		1.230.877	1.396.676	1.504.339	+ 7,7

*** Excluding trade between EU-27 and United Kingdom.**

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

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Table 26

EU: Exports of Casein and Caseinates to 3rd countries

000 t	Months	2019	2020	Months	2020	2021	Months	2020	2021
		EU-27[1)]	EU-27[1)]		EU-27[2)]	EU-27[2)]		Export to UK	
Denmark	12	0,0	0,0	12	0,0	0,1	11	.	.
France	12	24,3	24,5	12	24,3	24,0	11	0,2	0,2
Netherlands	12	2,3*	2,7*	12	2,4*	2,2*	11	0,2*	0,1*
Germany	12	13,3	11,8	12	10,5	13,0	11	0,4	0,2
Ireland	12	35,0	36,3	12	33,3	41,0	11	2,7	3,1
Poland	12	8,1	7,0	12	6,9	7,4	11	0,0	0,0
All other	12	5,4	4,5	12	2,3	3,9	11	0,0	0,1
EU-28 [1)]	**12**	**88,4**	**86,8**	**12**	**79,7**	**91,6**	11	**3,5**	**3,6**

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

1) Incl. trade with UK. 2) Excl. trade with UK.

Sources: ZMB, EU-Comm./ EUROSTAT.

Table 27

Protein-Products-Production

	January - December		
000 t	**2020**	**2021***	**21:20 ***
Casein, France	43,0	41,4	- 3,8%
Casein, Ukraine	5,6	6,2	+ 11,1%
MPC, USA	94,2	89,0	- 5,5%
WPC, USA	216,7	225,1	+3,9%
WPI, USA	52,8	58,1	+10,1%
Laktose, USA	500,2	508,8	+1,7%

**) Provisional.*

Sources: ZMB, national statistics. **© ZMB**

Table 28

Imports of Casein and Caseinates			Jan. to Dec.	
' 000 t	2019	2020	2020	2021
EU-27 (Incl IP.)*[2]	**19,2**	**18,0**	**17,2**	**15,7**
USA	**68,8**	**66,4**	**66,4**	**75,0**
- from				
total EU	***37,6***	***36,1***	***36,1***	***38,7***
- Ireland	*15,8*	*15,6*	*15,6*	*15,4*
- France	*5,4*	*5,8*	*5,8*	*6,4*
- Germany	*2,1*	*1,1*	*1,1*	*1,2*
- Netherlands	*7,0*	*6,4*	*6,4*	*7,5*
- Poland	*4,1*	*3,0*	*3,0*	*3,3*
- Other M. C.	*3,3*	*4,2*	*4,2*	*4,9*
India	*2,1*	*0,7*	*0,7*	*2,2*
New Zealand	*24,6*	*23,7*	*23,7*	*27,0*
Japan	**13,5**	**12,5**	**12,5**	**13,0**
China	**24,4**	**29,7**	**29,7**	**39,3**
Mexico[2]	**21,4**	**22,9**	**12,3**	**15,7**
South Korea	**7,9**	**7,8**	**7,8**	**8,7**
Malaysia[1]	**4,7**	**4,5**	**2,7**	**3,7**
Thailand	**5,5**	**5,9**	**5,9**	**5,3**
Indonesia[2]	**8,7**	**9,6**	**8,7**	**8,6**

1) January to July. 2) January to November.

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

Table 29

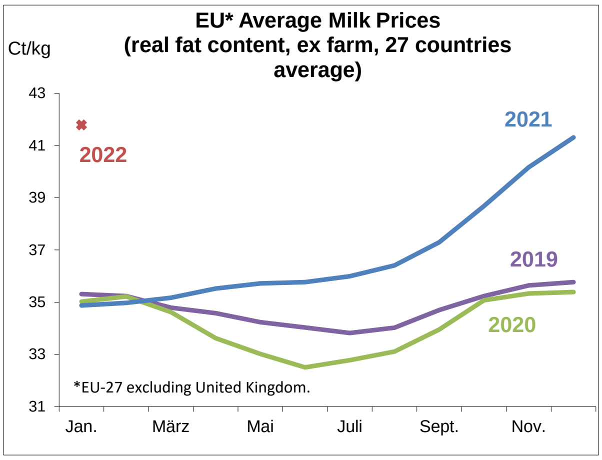
EU: Exports of Lactose[1)]

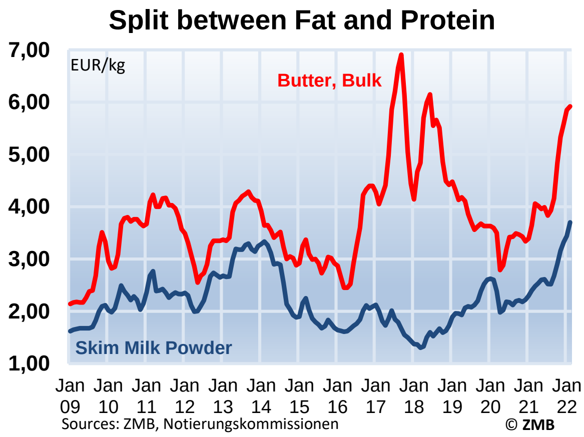
1.000 t	Months	2019	2020	Months	2020	2021	Months	2020	2021
		EU-27[2)]	EU-27[2)]		EU-27[3)]	EU-27[3)]		Export to UK	
Germany	12	107,6	120,4	12	118,2	117,1	11	2,0	1,6
Estonia	12	.	.	12	.	.	11	.	.
Ireland	12	0,7	2,7	12	2,5	0,4	11	0,2	0,2
France	12	23,3	31,7	12	29,4	25,5	11	1,7	2,3
Italy	12	13,5	18,1	12	18,1	19,8	11	0,0	0,0
Latvia	12	2,0	0,5	12	0,5	0,0	11	.	.
Lithuania	12	7,3	8,8	12	8,5	8,8	11	0,2	0,8
Austria	12	3,4	2,9	12	2,8	2,8	11	0,1	0,1
Netherlands	12	67,5	72,1	12	72,0	69,5	11	0,1	4,6
Other	12	16,2	31,7	12	31,5	21,6	11	0,2	0,0
EU	12	**241,5**	**288,8**	**12**	**283,5**	**265,5**	11	**4,6**	**9,6**

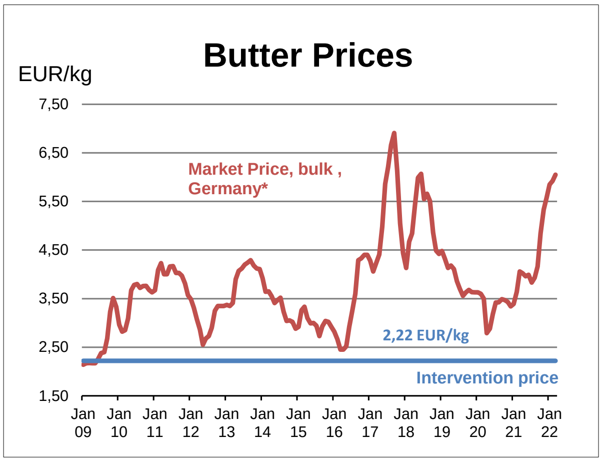
1) To countries outside EU. 2) Incl. trade with UK. 3) Excl. trade with UK.

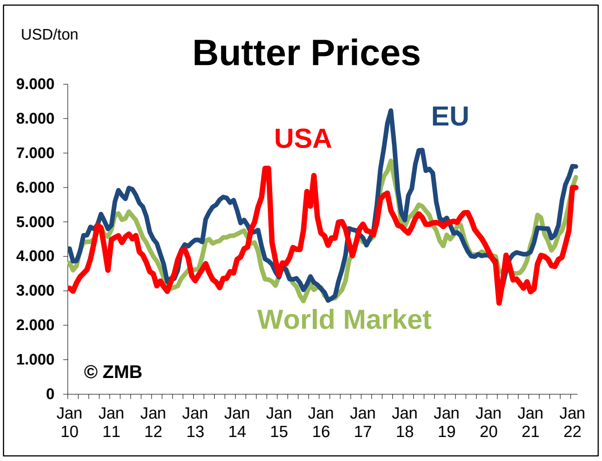
Source: ZMB, EU Commission, EUROSTAT - COMEXT.

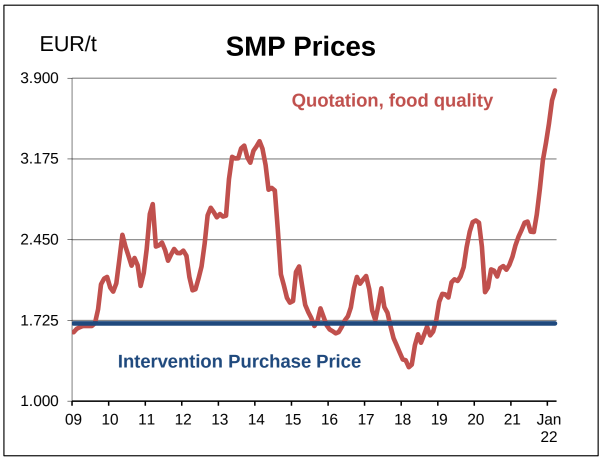
Graphs

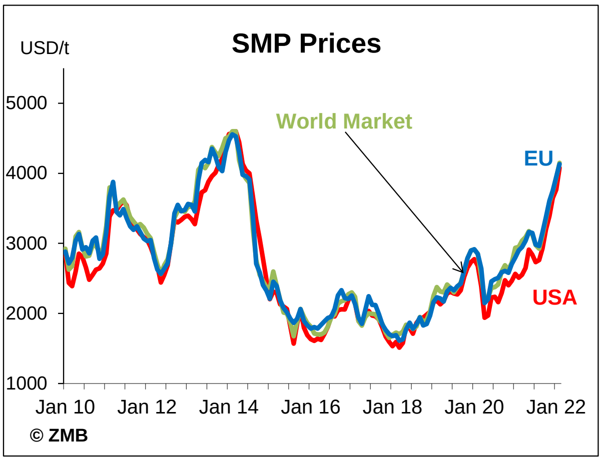

EU* Average Milk Prices
(real fat content, ex farm, 27 countries average)
Ct/kg
43
41
39
37
35
33
31
2022
2021
2019
2020
*EU-27 excluding United Kingdom.
Jan.
März
Mai
Juli
Sept.
Nov.

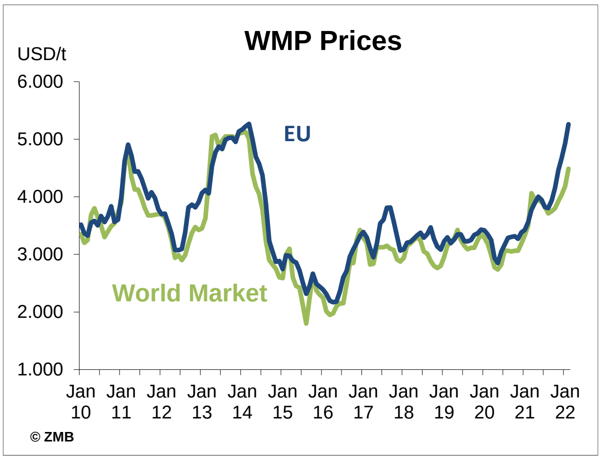

Split between Fat and Protein
7,00
6,00
5,00
4,00
3,00
2,00
1,00
EUR/kg
Butter, Bulk
Skim Milk Powder
Jan 09 Jan 10 Jan 11 Jan 12 Jan 13 Jan 14 Jan 15 Jan 16 Jan 17 Jan 18 Jan 19 Jan 20 Jan 21 Jan 22
Sources: ZMB, Notierungskommissionen
© ZMB


Butter Prices
EUR/kg
7,50
6,50
5,50
4,50
3,50
2,50
1,50
Market Price, bulk , Germany*
2,22 EUR/kg
Intervention price
Jan 09 Jan 10 Jan 11 Jan 12 Jan 13 Jan 14 Jan 15 Jan 16 Jan 17 Jan 18 Jan 19 Jan 20 Jan 21 Jan 22


USD/ton
Butter Prices
9.000
8.000
7.000
6.000
5.000
4.000
3.000
2.000
1.000
0
EU
USA
World Market
© ZMB
Jan 10 Jan 11 Jan 12 Jan 13 Jan 14 Jan 15 Jan 16 Jan 17 Jan 18 Jan 19 Jan 20 Jan 21 Jan 22


EUR/t
SMP Prices
3.900
3.175
2.450
1.725
1.000
Quotation, food quality
Intervention Purchase Price
09 10 11 12 13 14 15 16 17 18 19 20 21 Jan 22


USD/t
SMP Prices
5000
4000
3000
2000
1000
World Market
EU
USA
Jan 10 Jan 12 Jan 14 Jan 16 Jan 18 Jan 20 Jan 22
© ZMB


WMP Prices
USD/t
6.000
5.000
4.000
3.000
2.000
1.000
EU
World Market
Jan 10 Jan 11 Jan 12 Jan 13 Jan 14 Jan 15 Jan 16 Jan 17 Jan 18 Jan 19 Jan 20 Jan 21 Jan 22
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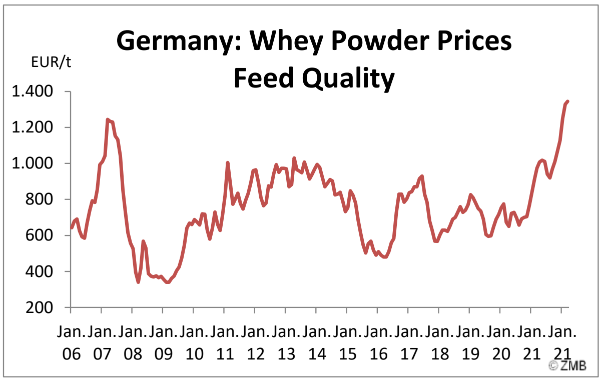
Germany: Whey Powder Prices
Feed Quality
EUR/t
1.400
1.200
1.000
800
600
400
200
Jan. 06 Jan. 07 Jan. 08 Jan. 09 Jan. 10 Jan. 11 Jan. 12 Jan. 13 Jan. 14 Jan. 15 Jan. 16 Jan. 17 Jan. 18 Jan. 19 Jan. 20 Jan. 21 Jan. 21
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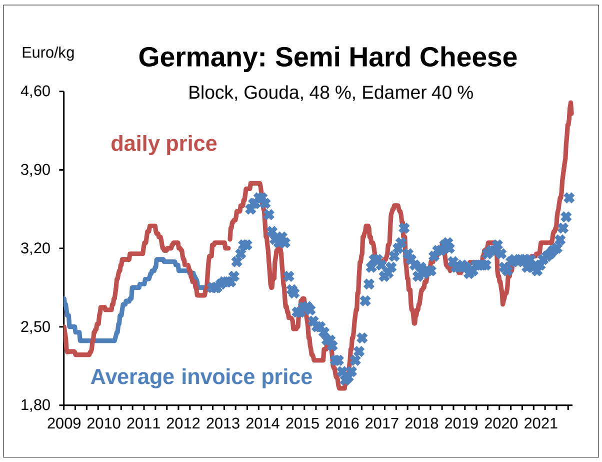
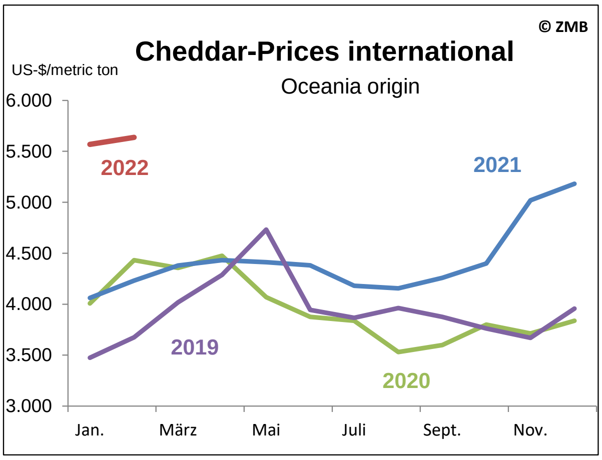

Germany: Semi Hard Cheese
Block, Gouda, 48 %, Edamer 40 %
Euro/kg
4,60
3,90
3,20
2,50
1,80
daily price
Average invoice price
2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021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Cheddar-Prices international
Oceania origin
US-$/metric ton
6.000
5.500
5.000
4.500
4.000
3.500
3.000
2022
2021
2019
2020
Jan. März Mai Juli Sept. Nov.

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to access the Commission's reports

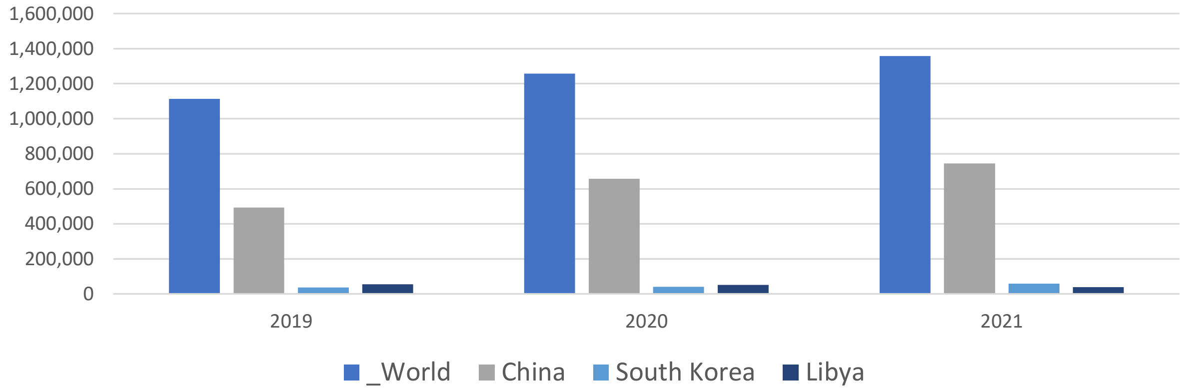
TRADE DATA MONITOR (TDM)

EU27 + UK Exports to World

Commodity: 0401, Milk and Cream, not concentrated nor containing added sweetening (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	1,114,531	1,258,327	1,357,485	100%	100%	100%	8%
China	T	493,511	657,160	744,979	44%	52%	55%	13%
South Korea	T	36,314	41,063	58,310	3%	3%	4%	42%
Libya	T	55,676	49,936	39,309	5%	4%	3%	-21%

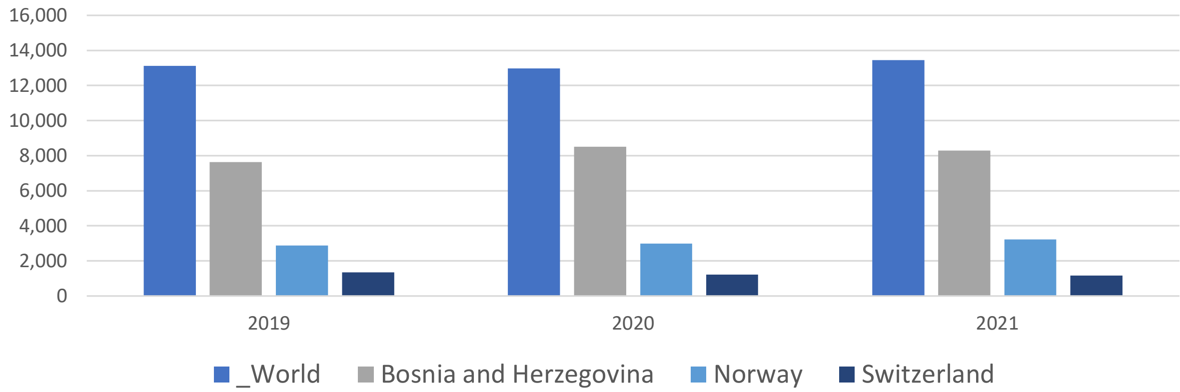


EU27 + UK Imports from World

Commodity: 0401, Milk and Cream, not concentrated nor containing added sweetening (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	13,135	12,978	13,457	100%	100%	100%	4%
Bosnia and Herzegovina	T	7,642	8,510	8,299	58%	66%	62%	-2%
Norway	T	2,888	2,990	3,239	22%	23%	24%	8%
Switzerland	T	1,356	1,237	1,166	10%	10%	9%	-6%



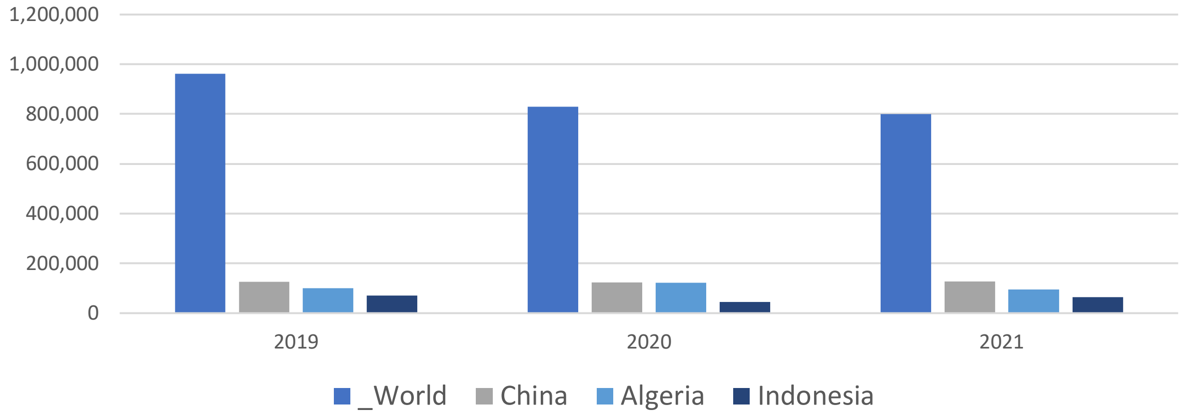
Source: TDM

EU27 + UK Exports to World

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% (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	961,546	829,024	798,967	100%	100%	100%	-4%
China	T	126,423	123,687	127,312	13%	15%	16%	3%
Algeria	T	100,294	122,369	94,877	10%	15%	12%	-22%
Indonesia	T	70,961	45,068	64,769	7%	5%	8%	44%

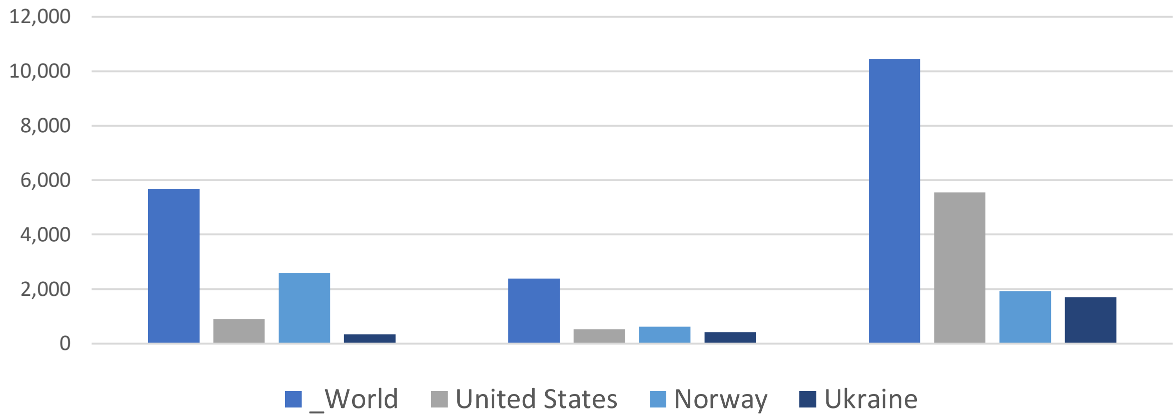


EU27 + UK Imports from World

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% (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	5,670	2,383	10,436	100%	100%	100%	338%
United States	T	907	524	5,544	16%	22%	53%	958%
Norway	T	2,598	629	1,928	46%	26%	18%	207%
Ukraine	T	340	420	1,707	6%	18%	16%	306%



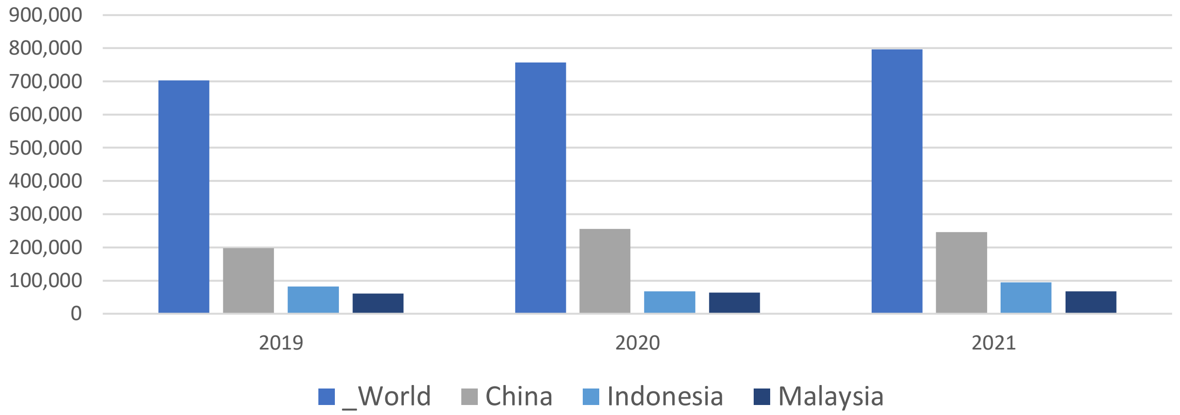
Source: TDM

EU27 + UK Exports to World

Commodity: 0404, Whey and other products consisting of natural milk constituents, whether or not concentrated or sweetened, Nesoi (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	702,837	756,881	796,397	100%	100%	100%	5%
China	T	197,186	255,244	246,075	28%	34%	31%	-4%
Indonesia	T	81,644	67,844	93,939	12%	9%	12%	38%
Malaysia	T	61,130	63,900	67,557	9%	8%	8%	6%

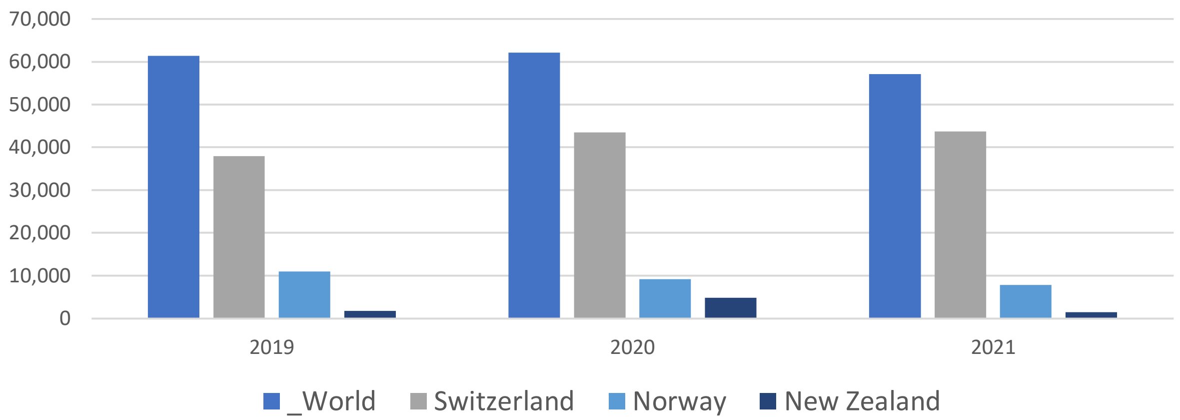


EU27 + UK Imports from World

Commodity: 0404, Whey and other products consisting of natural milk constituents, whether or not concentrated or sweetened, Nesoi (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	61,367	62,139	57,106	100%	100%	100%	-8%
Switzerland	T	37,886	43,482	43,673	62%	70%	76%	0%
Norway	T	10,937	9,156	7,807	18%	15%	14%	-15%
New Zealand	T	1,783	4,846	1,464	3%	8%	3%	-70%



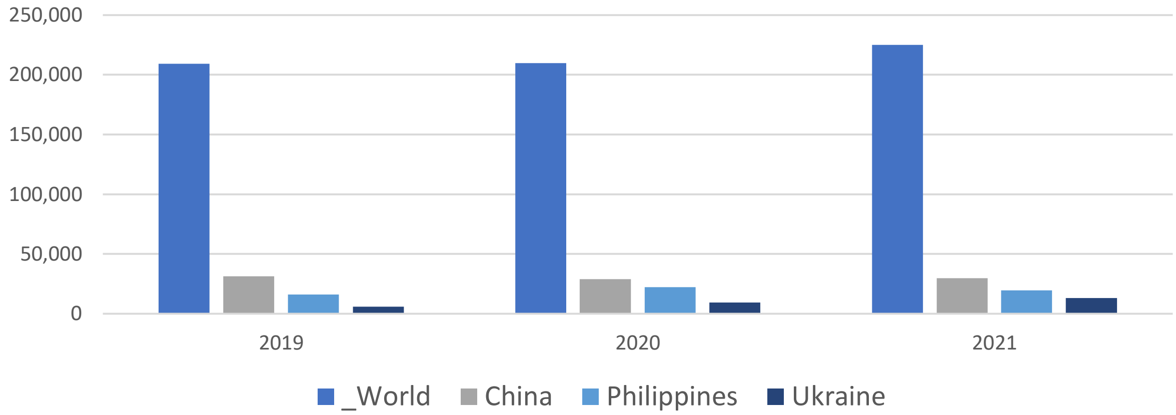
Source: TDM

EU27 + UK Exports to World

Commodity: 0403, Buttermilk, Curdled Milk and Cream, Yogurt, Kephir, Etc., whether or not flavored, Etc. or containing added fruit or cocoa (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	209,181	209,671	224,787	100%	100%	100%	7%
China	T	31,301	29,031	29,652	15%	14%	13%	2%
Philippines	T	16,287	22,200	19,428	8%	11%	9%	-12%
Ukraine	T	6,120	9,418	13,200	3%	4%	6%	40%

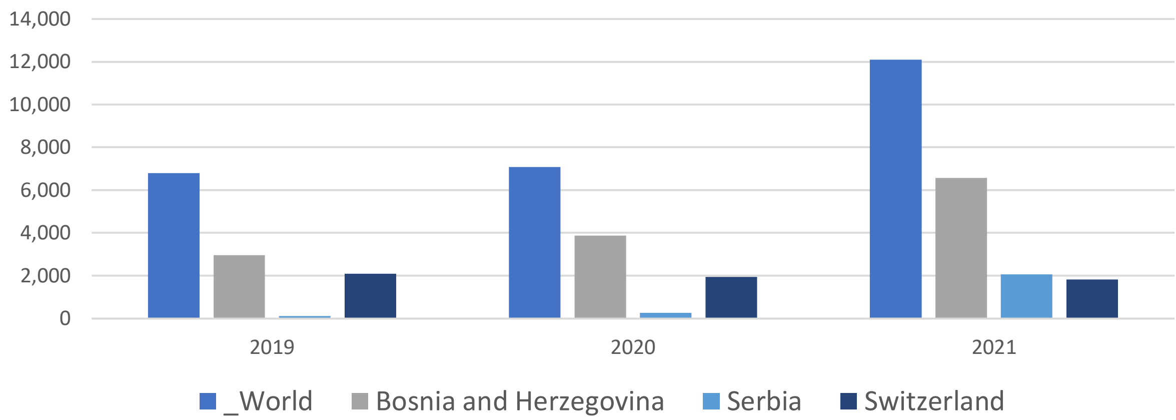


EU27 + UK Imports from World

Commodity: 0403, Buttermilk, Curdled Milk and Cream, Yogurt, Kephir, Etc., whether or not flavored, Etc. or containing added fruit or cocoa (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	6,794	7,086	12,094	100%	100%	100%	71%
Bosnia and Herzegovina	T	2,962	3,882	6,562	44%	55%	54%	69%
Serbia	T	111	271	2,060	2%	4%	17%	660%
Switzerland	T	2,089	1,945	1,822	31%	27%	15%	-6%



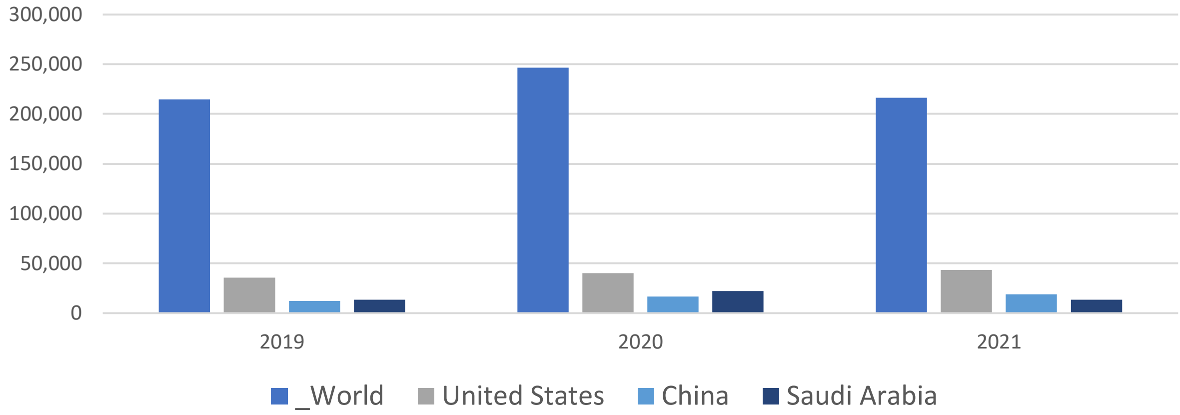
Source: TDM

EU27 + UK Exports to World

Commodity: 0405, Butter and other fats and oils derived from milk (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	214,822	246,434	216,157	100%	100%	100%	-12%
United States	T	35,826	40,292	43,658	17%	16%	20%	8%
China	T	12,064	16,633	19,072	6%	7%	9%	15%
Saudi Arabia	T	13,638	22,220	13,556	6%	9%	6%	-39%

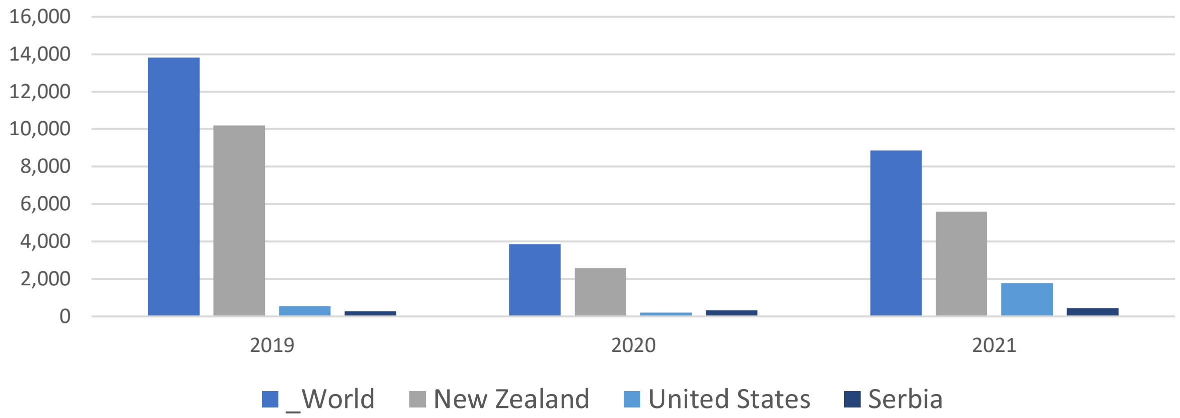


EU27 + UK Imports from World

Commodity: 0405, Butter and other fats and oils derived from milk (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	13,831	3,839	8,861	100%	100%	100%	131%
New Zealand	T	10,189	2,574	5,592	74%	67%	63%	117%
United States	T	547	206	1,774	4%	5%	20%	761%
Serbia	T	269	331	440	2%	9%	5%	33%



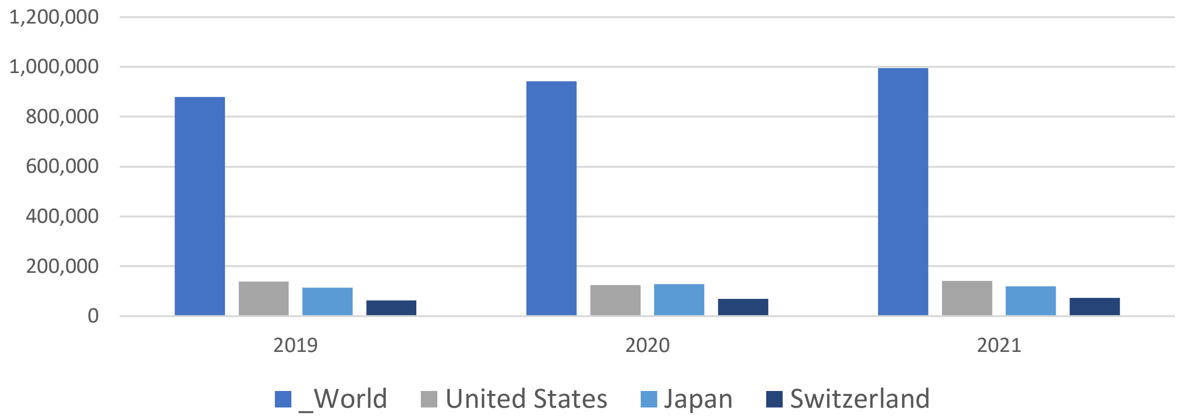
Source: TDM

EU27 + UK Exports to World

Commodity: 0406, Cheese and Curd (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	879,148	942,635	995,783	100%	100%	100%	6%
United States	T	139,198	125,304	142,235	16%	13%	14%	14%
Japan	T	114,125	128,461	118,743	13%	14%	12%	-8%
Switzerland	T	62,525	69,761	73,549	7%	7%	7%	5%

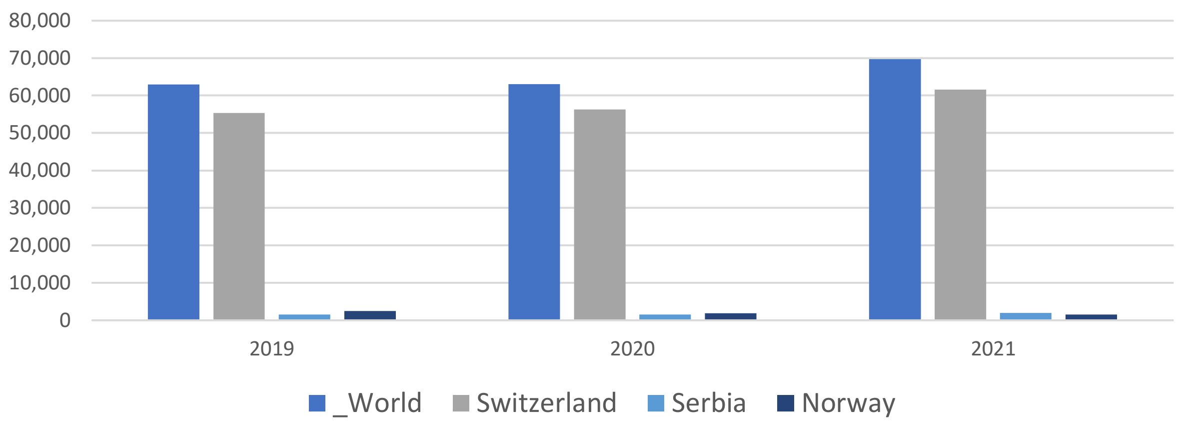


EU27 + UK Imports from World

Commodity: 0406, Cheese and Curd (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	63,002	63,009	69,691	100%	100%	100%	11%
Switzerland	T	55,289	56,271	61,606	88%	89%	88%	9%
Serbia	T	1,506	1,551	1,915	2%	2%	3%	23%
Norway	T	2,452	1,832	1,532	4%	3%	2%	-16%



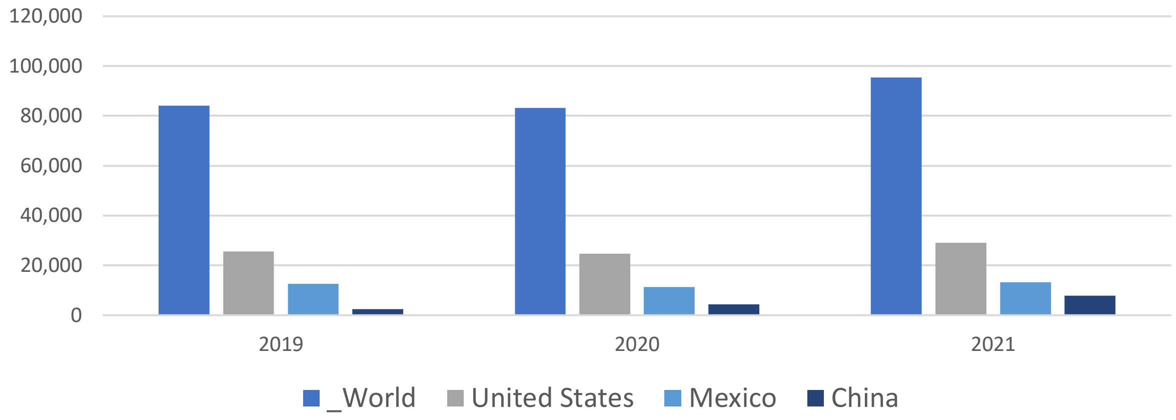
Source: TDM

EU27 + UK Exports to World

Commodity: 3501, Casein, Caseinates and other Casein derivatives; Casein Glues (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	84,084	83,114	95,365	100%	100%	100%	15%
United States	T	25,494	24,698	28,950	30%	30%	30%	17%
Mexico	T	12,633	11,345	13,195	15%	14%	14%	16%
China	T	2,501	4,407	7,882	3%	5%	8%	79%

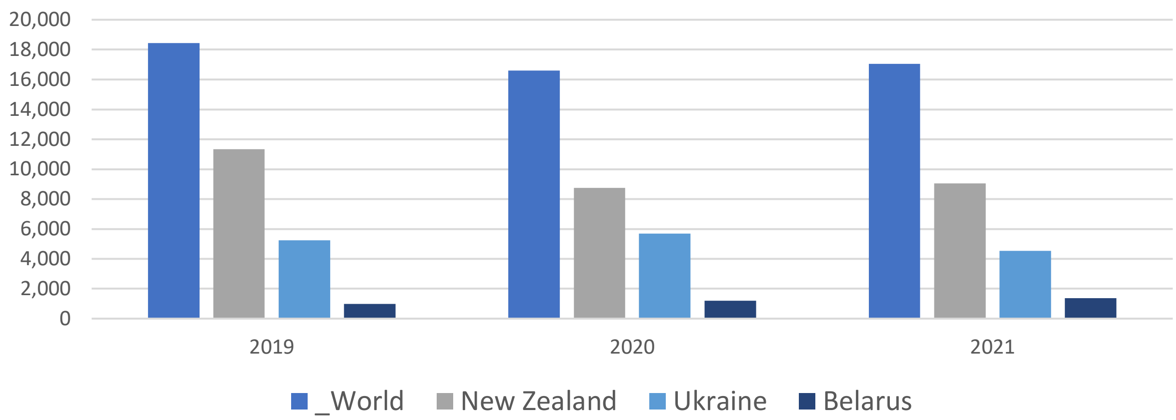


EU27 + UK Imports from World

Commodity: 3501, Casein, Caseinates and other Casein derivatives; Casein Glues (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	18,436	16,592	17,034	100%	100%	100%	3%
New Zealand	T	11,315	8,741	9,043	61%	53%	53%	3%
Ukraine	T	5,234	5,668	4,513	28%	34%	26%	-20%
Belarus	T	975	1,199	1,362	5%	7%	8%	14%



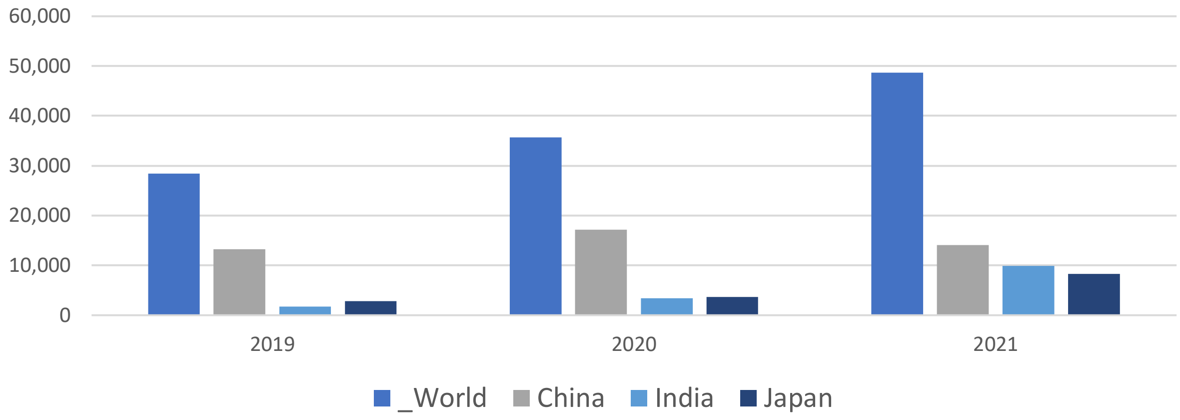
Source: TDM

EU27 + UK Exports to World

Commodity: 350220, Milk Albumin, including concentrates of two or more Whey Proteins (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	28,426	35,643	48,685	100%	100%	100%	37%
China	T	13,232	17,180	14,102	47%	48%	29%	-18%
India	T	1,747	3,423	9,895	6%	10%	20%	189%
Japan	T	2,830	3,671	8,283	10%	10%	17%	126%

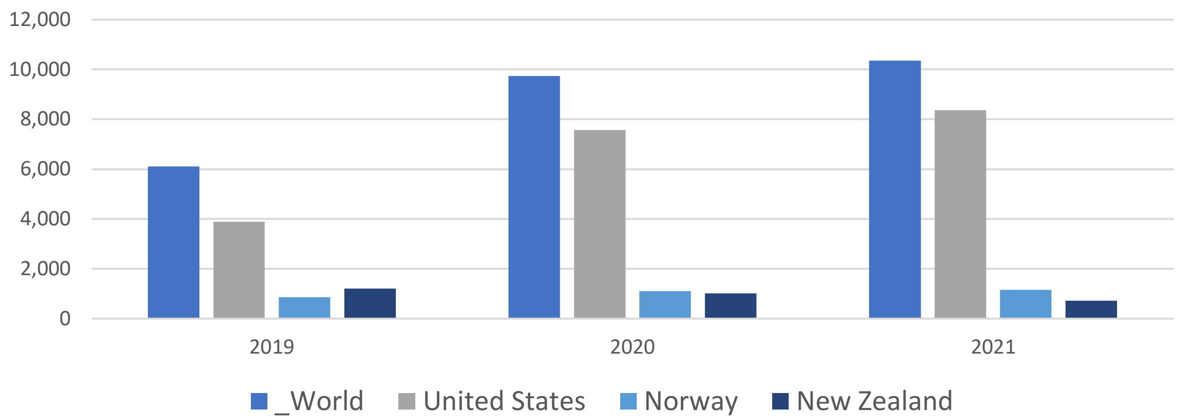


EU27 + UK Imports from World

Commodity: 350220, Milk Albumin, including concentrates of two or more Whey Proteins (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	6,105	9,739	10,355	100%	100%	100%	6%
United States	T	3,877	7,566	8,360	64%	78%	81%	10%
Norway	T	852	1,102	1,145	14%	11%	11%	4%
New Zealand	T	1,212	1,007	719	20%	10%	7%	-29%



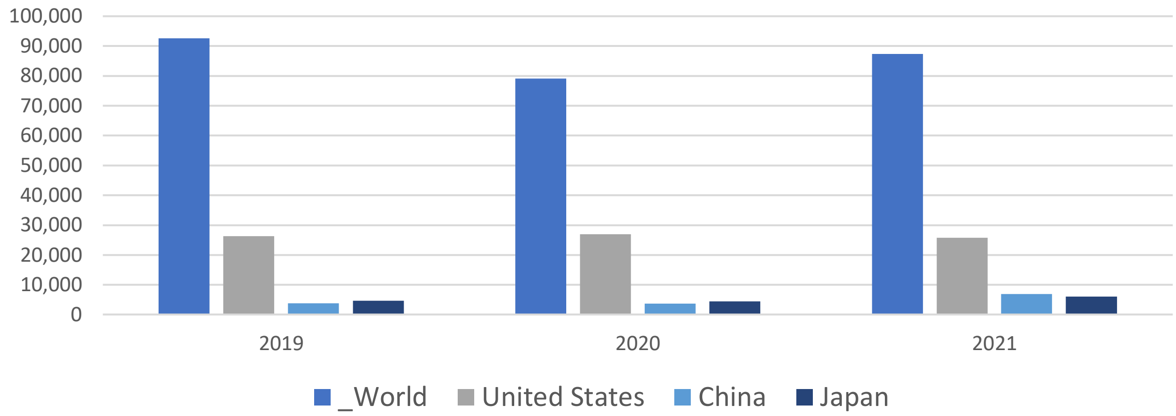
Source: TDM

EU27 + UK Exports to World

Commodity: 350400, Peptones and derivatives; other proteins and derivatives, Nesoi; Hide Powder, chromed or not (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	92,563	79,053	87,358	100%	100%	100%	11%
United States	T	26,233	26,901	25,799	28%	34%	30%	-4%
China	T	3,800	3,686	6,808	4%	5%	8%	85%
Japan	T	4,644	4,452	6,040	5%	6%	7%	36%

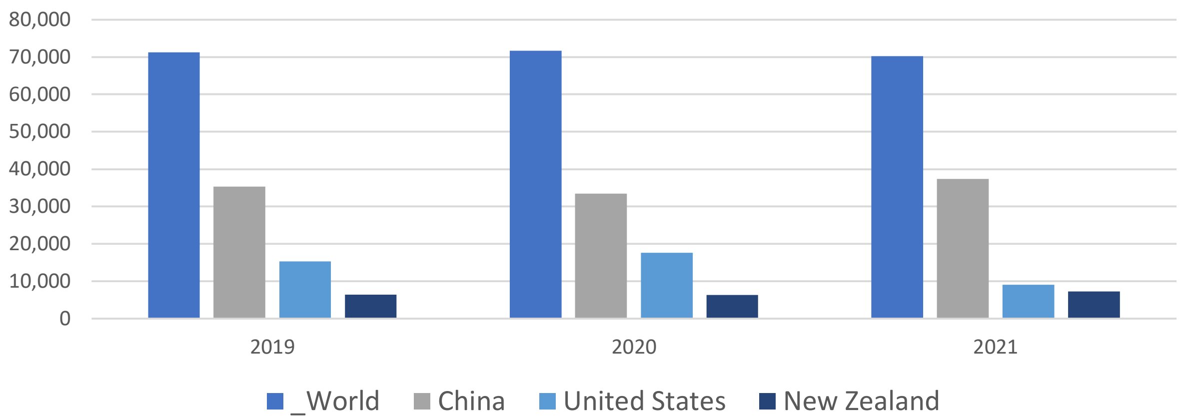


EU27 + UK Imports from World

Commodity: 350400, Peptones and derivatives; other proteins and derivatives, Nesoi; Hide Powder, chromed or not (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	71,245	71,751	70,173	100%	100%	100%	-2%
China	T	35,235	33,456	37,358	49%	47%	53%	12%
United States	T	15,292	17,597	9,010	21%	25%	13%	-49%
New Zealand	T	6,401	6,296	7,260	9%	9%	10%	15%



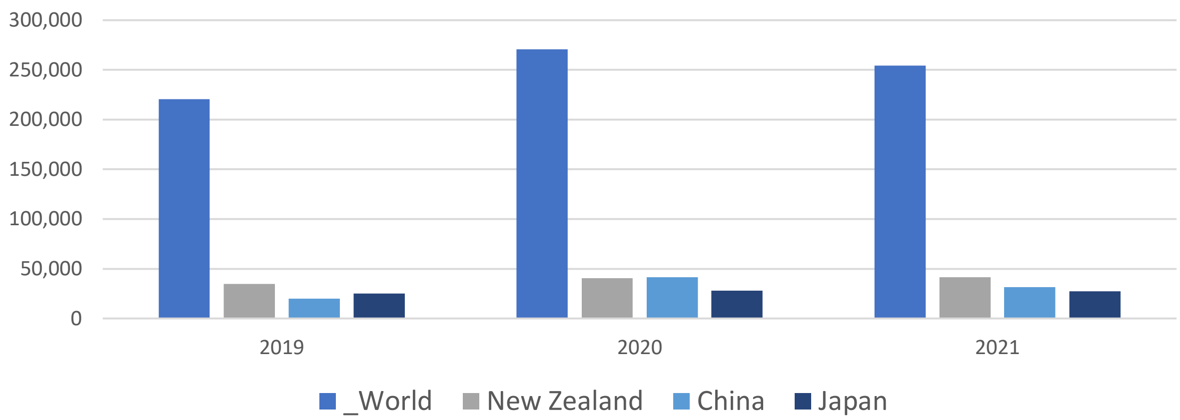
Source: TDM

EU27 + UK Exports to World

Commodity: 170211, Lactose and Lactose Syrup containing by Weight 99% or more Lactose, expressed as Anhydrous Lactose, calculated on the dry matter (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	220,273	270,604	254,095	100%	100%	100%	-6%
New Zealand	T	34,845	40,402	41,679	16%	15%	16%	3%
China	T	19,910	41,397	31,342	9%	15%	12%	-24%
Japan	T	25,217	27,797	27,347	11%	10%	11%	-2%

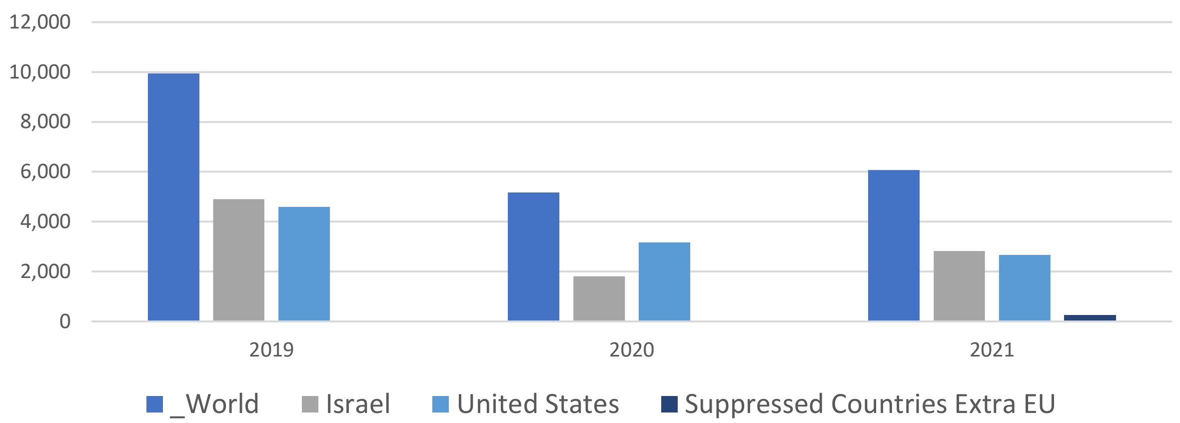


EU27 + UK Imports from World

Commodity: 170211, Lactose and Lactose Syrup containing by Weight 99% or more Lactose, expressed as Anhydrous Lactose, calculated on the dry matter (in tonnes)

Year to Date: Dec, 2019 - 2021

Partner		2019	2020	2021	2019	2020	2021	%Δ 2021/20
_World	T	9,939	5,168	6,077	100%	100%	100%	18%
Israel	T	4,903	1,800	2,813	49%	35%	46%	56%
United States	T	4,588	3,167	2,668	46%	61%	44%	-16%
Suppressed Countries Extra EU	T	0	0	242	0%	0%	4%	Calculation not possible



Source: TDM

CWT EXPORT SUBSIDIES

CWT exports subsidies - Last update: 7 March 2022

	(TONNES)	American type cheeses	Butter	Butteroil (AMF)	WMP	Cream cheese	Exported to
2022	**February**	12,066			6,396	1,089	14 countries in 4 regions
	January	6,804			907	771	14 countries in 4 regions
2021	**December**	24,222	7,303	2,903	20,457	5,534	28 countries in 7 regions
	November	22,634	7,212	2,767	20,457	5,216	28 countries in 7 regions
	October	17,327	6,033	2,767	19,913	4,763	28 countries in 7 regions
	September	17,100	5,761	2,767	10,886	4,717	28 countries in 7 regions
	August	16,057	5,761	2,495	8,391	4,309	27 countries in 7 regions
	July	14,107	5,352	2,313	8,301	3,946	27 countries in 6 regions
	June	11,567	5,080	3,311	7,802	3,583	26 countries in 6 regions
	May	7,031	4,717	3,221	7,530	2,767	30 countries in 6 regions
	April	6,577	4,491	3,221	7,121	2,495	26 countries in 6 regions
	March	5,382	3,992	1,633	6,123	1,996	26 countries in 6 regions
	February	3,682	3,301	913	2,946	1,601	20 countries in 6 regions
	January	1,352	1,518	447	1,378	1,071	15 countries in 6 regions
2020	**December**	16,647	6,713		25,129		30 countries in 7 regions
	November	14,742	5,670		22,045		29 countries in 7 regions
	October	12,001	4,264		19,432		29 countries in 7 regions
	September	11,794	3,781		15,892		29 countries in 7 regions
	August	11,067	3,169		16,488		28 countries in 7 regions
	July	10,071	2,852		14,218		29 countries in 7 regions
	June	9,984	2,833		8,669		30 countries in 7 regions
	May	8,882	2,747		7,619		28 countries in 7 regions
	April	7,292	2,105		8,111		24 countries in 6 regions
	March	4,930	729		4,805		22 countries in 6 regions
	February	2,221	540		2,400		19 countries in 6 regions
	January	601	149		292		10 countries in 5 regions
2019	**December**	21,727	2,223		21,682		27 countries in 6 regions
	November	21,273	2,087		20,593		27 countries in 6 regions
	October	20,593	2,087		19,867		27 countries in 6 regions
	September	19,323	2,041		19,051		27 countries in 6 regions
	August	17,826	1,905		16,919		26 countries in 6 regions
	July	16,239	1,905		16,601		26 countries in 6 regions
	June	13,946	1,911		15,152		26 countries in 6 regions
	May	12,155	2,094		13,325		26 countries in 6 regions
	April	12,062	1,797		10,631		23 countries in 6 regions
	March	11,267	1,254		10,059		22 countries in 6 regions
	February	9,198	537		5,034		–
	January	5,320	321		1,020		–
2018	**December**	30,391	7,779		17,236		–
	October	23,464	6,005		24,321		36 countries on 5 continents
	September	23,565	5,879		23,722		35 countries on 5 continents
	August	21,183	5,736		15,127		31 countries on 5 continents
	July	20,202	5,482		9,120		28 countries on 5 continents
	June	17,720	5,093		4,619		25 countries on 5 continents
	May	16,039	5,005		4,619		25 countries on 5 continents
	April	14,846	4,335		–		25 countries on 5 continents
	March	12,313	2,546		–		19 countries on 4 continents
	February	8,402	1,521		–		15 countries on 4 continents
	January	2,419	331		–		10 countries on 3 continents

Information issued from http://www.cwt.coop/
Also available at https://hoards.com/articles.sec-2-1-industry-buzz.html
Figures are adjusted for cancellations that occurred during the month !

IMPORTANT UPCOMING EVENTS

Important upcoming events 2022

Date	Event	Jurisdiction
2021-2022	EU Conference on the future of Europe	EU
2022 Jan-Jun	French Presidency	EU
2022 Apr	ADPI/ABI Conference, Chicago, US	Global
2022 Jul-Dec	Czech Presidency	EU
2022 Sep	International Whey Conference, Chicago, US	Global
2022 Sep	EDA Annual Congress, Madrid, Spain	EU