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TRADE AND ECONOMICS COMMITTEE

Thursday 16 June 2022

EDA offices



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connect to the world of dairy

EDA MARKET SURVEY





MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 16 JUNE 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-April 2022 / Jan-April 2021	What are your expectations for deliveries in Q2/22 compared to Q2/21?	What are your expectations for deliveries in Q3/22 compared to Q3/21?
+ 4,3 %	(deliveries)	(deliveries)
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q2/21?
Current milk price: 45,84 Cent/kg (for milk with 4,2 % fat, 3,4 % protein, all qualities, without tax, ex farm)	April 22 / April 21: + 21,1 %	(prices)

⌚ DAIRY PRODUCTS DEVELOPMENT

	Production		Price		COMMENT
	Jan-March 2022 / Jan-March 2021	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Expectations Q3/22 compared to Q3/21 (+ / - / stable)	May 22 / May 21	Expectations Q2/22 compared to Q1/22 (+ / - / stable) (Including stocks, consumption, etc...)
SMP	+ 41,7 %			+ 65 %	
WMP	+ 100,0 %			+ 65 %	prodction at a low level
CHEESE	+ 3,2 %			+ 10 to 30 %	main product
BUTTER	- 11,3 %			+ 35 %	
WHEY	- 43,1 %			+ 35 %	



⌚ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2022 – May 2022**
(e.g. industrial developments, domestic policy changes, external factors, exports)

In contrast to most EU countries, milk collection in Austria is on the rise (+ 4,3 %), although the growth rate has weakened slightly recently. The delivery of organic milk increased by 0,6 %; the share of the total delivery volume was 18,8 %.

Despite the increased costs in the energy and packaging sectors, higher price agreements were difficult to implement in the retail sector. Austria's farmers' milk price has always been in the EU top range, but is currently in the middle of the EU. However, the Austrian dairy industry expects to be able to push through further price increases with retailers in the near future.

Unfortunately, a regulation in the case of a natural gas supply stop on the part of Russia is still unresolved.

⌚ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD 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 THE WAR ON UKRAINE ON THE DAIRY SECTOR**

Please indicate and describe the potential ongoing effects of the war on Ukraine on prices, production, and internal market:



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 16 JUNE 2022

Delegation: BELGIUM

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-April 2022 / Jan-April 2021		What are your expectations for deliveries in Q2/22 compared to Q2/21?	What are your expectations for deliveries in Q3/22 compared to Q3/21?
+0.7%	stable (deliveries)		stable (deliveries)
Milk price evolution			What are your expectations for prices in Q2/22 compared to Q2/21?
Current milk price (April 22): €48,81 / 100 kg	April 22 / April 21: +39%		++ (prices)

⌚ DAIRY PRODUCTS DEVELOPMENT

	Production		Price		COMMENT
	Jan-dec 2021/ Jan-dec 2020	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Expectations Q3/22 compared to Q3/21 (+ / - / stable)	May 2022 / May 2021 (week 18-21)	Expectations Q2/22 compared to Q1/22 (+ / - / stable)
SMP	-0.2%			+53%	
WMP	-49,9%			+57%	
CHEESE (excl. processed cheese)	+4,6%			%	
BUTTER	+6,8%			+80%	
WHEY	%			%	



⌚ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2022 – May 2022**
(e.g. industrial developments, domestic policy changes, external factors, exports)

⌚ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD 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 THE WAR ON UKRAINE ON THE DAIRY SECTOR**

Please indicate and describe the potential ongoing effects of the war on Ukraine on prices, production, and internal market:



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 16 JUNE 2022

Delegation: CZECH REPUBLIC

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-April 2022 / Jan-April 2021	What are your expectations for deliveries in Q2/22 compared to Q2/21?	What are your expectations for deliveries in Q3/22 compared to Q3/21?
+ 2,27 %	Moderate decrease (deliveries)	Moderate decrease (deliveries)
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q2/21?
Current milk price: 42,86 ct/kg	April 22 / April 21: + 28,9 %	Further increase (prices)

⌚ DAIRY PRODUCTS DEVELOPMENT

	Production		Price		COMMENT
	Jan-April 2022/ Jan-April 2021	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Expectations Q3/22 compared to Q3/21 (+ / - / stable)	May 22 / May 21	Expectations Q2/22 compared to Q1/22 (+ / - / stable)
SMP	- 12,0 %	+	+	+ 43,6 %	stable
WMP	+ 1,1 %	stable	stable	+ 28,0 %	stable
CHEESE	Natural -1,8 % Processed -7,1 %	+	stable	Gouda + 28,4 % Edam30 + 40,9 % Edam40 + 39,4 %	stable
BUTTER	+ 4,5 %	-	-	250g + 35,3 % Block +43,7 %	+
WHEY	Powder + 11,6 % Evaporated + 1,7 %	+		36,4 %	stable



⌚ NATIONAL DAIRY MARKET DEVELOPMENTS: January 2022 – May 2022
 (e.g. industrial developments, domestic policy changes, external factors, exports)

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

- Liquid milk: + 11,1 %, from that fresh milk + 0,3 %, UHT + 13,7 %; school milk +58,4 % due to lockdown in 2021
- Cream: - 2,6 %
- Yoghurt: - 4,7 %; other fermented milk products + 3,9 %
- Dairy spreads: - 8,3 %
- Curd: + 2,2 %

⌚ NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2022)
 (Trends, industrial changes, policy changes, market expectations)

- 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
- Rising dairy prices in retail continue relatively slowly and are hampered by a strong retail position. However, the increase in dairy prices in connection with rising costs has already managed to double-digit, between + 10 and 15 %.
- However, all this also affects the growth of inflation, which is approximately 14-15%. Although a slight decline is expected, it will still remain higher than 10% for the year. Consumer prices are likely to continue to rise, although this may have an impact on purchasing power and, consequently, on declining consumption.
- The situation with the number of Ukrainian refugees remains approximately the same. In the Czech Republic there are now just over 300,000 refugees, especially women and children, in schools we have about 60,000 Ukrainian pupils
- Due to EU sanctions against Russia, the macroeconomic situation may deteriorate, the Czech currency will weaken and oil and gas supplies will diminish.



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

- **Expected evolution in milk supply (+/-?)**: more/less stable situation or a very moderate decrease - may be affected by rising feed and oil prices and the level of consumer demand
- **Production trends for main products**: more or less stable situation in all products categories, also depend by consumer demand
- **Consumption trends**:

Consumption: final figures about milk consumption in 2021 has been publish:

- Liquid milk total 56,7 kg (-1,6 %)
- Cream: 6,5 kg (+ 6,6 %)
- Yoghurt 10,3 kg (-1,0 %)
- Other fermented products 5,0 kg (+ 4,2 %)
- Cheese total 19,1 % (+ 0 %)
- Butter 5,3 % (- 7,0 %)

Milk equivalent per capita in 2021 (without butter): **263,0 kg (+ 0,2 %)**

- **For 2022 is expected rather stable situation or a slight decrease in consumption caused by a decrease in purchasing power.**
- **Exports (+/- and why?)**: stable situation is expected so far, for the time being is there slight decrease to China due to lockdown situation in this Asian country

⌚ IMPACT OF THE WAR ON UKRAINE ON THE DAIRY SECTOR

Please indicate and describe the potential ongoing effects of the war on Ukraine on prices, production, and internal market:

These effects have already been mentioned in the short-term outlook for the milk market for Q3



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 16 JUNE 2022

Delegation: Germany

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-April 2022 / Jan-April 2021		What are your expectations for deliveries in Q2/22 compared to Q2/21?	
-1,4 %		- (deliveries)	
		Milk price evolution	
		What are your expectations for prices in Q2/22 compared to Q2/21?	
Current milk price: 47,10		April 22 / April 21:+38,2 %	
		++ (prices)	

⌚ DAIRY PRODUCTS DEVELOPMENT

	Production		Price		COMMENT
	Jan-March 2022/ Jan-March 2021	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Expectations Q3/22 compared to Q3/21 (+ / - / stable)	May 22 / May 21	Expectations Q2/22 compared to Q1/22 (+ / - / stable)
SMP	-17,3%	-		+55,0%	+
WMP	+12,7%	-		+63,7%	+
CHEESE	-0,8%	-		+59,7%	+
BUTTER	-3,8%	-		+78,4%	+
WHEY*	+1,7%	+		+25,9%	+



⌚ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2022 – May 2022**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Discussions about an animal-welfare-labelling are going on. The dairy markets are unusually firm and prices are higher than ever before, driven by uncertainty due to the war in Ukraine. Price increases stopped in May.

⌚ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2022)**
(Trends, industrial changes, policy changes, **market expectations**)

High uncertainty about further milk production and consumer reactions on high inflation-rates. Availability of natural gas for milk processing is another important issue.

⌚ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2022)**

Expected evolution in milk supply (+/-?):
Production trends for main products: slightly decreasing due to lower milk availability
Consumption trends: Consumer are more careful on spendings. Lower shares of premium products and specialities.
Exports (+/- and why?): slight decrease due to lower supply and problems in logistics

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

⌚ **IMPACT OF THE WAR ON UKRAINE ON THE DAIRY SECTOR**

Please indicate and describe the potential ongoing effects of the war on Ukraine on prices, production, and internal market:

Increasing costs of energy, feed, fertilizers and other goods. Less drivers. Shortage of energy for processing possible.



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 16 JUNE 2022

Delegation: Denmark

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-April 2022 / Jan-April 2021		What are your expectations for deliveries in Q2/22 compared to Q2/21?	What are your expectations for deliveries in Q3/22 compared to Q3/21?
+0,7%		+1 - -2% (deliveries)	+2 - -3% (deliveries)
Milk price evolution			What are your expectations for prices in Q2/22 compared to Q2/21?
Current milk price:	April 22 / April 21: +29%		+37% (prices)

⌚ DAIRY PRODUCTS DEVELOPMENT

	Production		Price		COMMENT
	Jan-March 2022/ Jan-March 2021	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Expectations Q3/22 compared to Q3/21 (+ / - / stable)	May 22 / May 21	Expectations Q2/22 compared to Q1/22 (+ / - / stable)
SMP	-2%			%	
WMP	+2%			%	
CHEESE	-8%			%	
BUTTER	+28%			%	
WHEY	%			%	



⌚ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2022 – May 2022**
(e.g. industrial developments, domestic policy changes, external factors, exports)

⌚ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD 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 THE WAR ON UKRAINE ON THE DAIRY SECTOR**

Please indicate and describe the potential ongoing effects of the war on Ukraine on prices, production, and internal market:



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 16 JUNE 2022

Delegation: FINLAND

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

⌚ MILK SUPPLY EVOLUTION => NOTE JANUARY-MARCH AVAILABLE FOR DELIVERIES

DELIVERIES	COMMENT	
Jan-April 2022 / Jan-April 2021	What are your expectations for deliveries in Q2/22 compared to Q2/21?	What are your expectations for deliveries in Q3/22 compared to Q3/21?
570 M kg / 580 M KG = -1,8 %	-1,4 % (deliveries)	-1,4 % (deliveries)
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q2/21?
Current milk price: 46,01 cent/kg	April 22 / April 21: +19 %	+ (prices)

⌚ DAIRY PRODUCTS DEVELOPMENT

	Production		Price		COMMENT
Jan-March 2022 / Jan-March 2021	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Expectations Q3/22 compared to Q3/21 (+ / - / stable)	May 22 / May 21	Expectations Q2/22 compared to Q1/22 (+ / - / stable)	(Including stocks, consumption, etc...)
SMP	%			%	
WMP	%			%	
CHEESE	1,1%			4,8%	
BUTTER	-5,9%			%	
WHEY	%			%	



⌚ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2022 – May 2022**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Milk volume continues to decline which has lead to lower production of dairy products. Cream production grew.

⌚ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD 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 THE WAR ON UKRAINE ON THE DAIRY SECTOR**

Please indicate and describe the potential ongoing effects of the war on Ukraine on prices, production, and internal market:



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 16 JUNE 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-April 2022 / Jan-April 2021	What are your expectations for deliveries in Q2/22 compared to Q2/21?
Minus 1%	Stable (deliveries)
Milk price evolution	
Current milk price: 53c	What are your expectations for prices in Q2/22 compared to Q2/21? Still more increases to come (prices)
	April 22 / April 21: plus 67%



□ DAIRY PRODUCTS DEVELOPMENT

Table 2 Milk Statistics

Category	Year	Unit	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Domestic milk intake by creameries and pasteurisers	2020	million	176.2	331.7	725.7	982.7	1115.3	1031.0	985.0	887.6	725.4	646.8	449.8	258.8	8295.9
	2021	litres	182.2	352.4	829.7	1060.5	1181.0	1067.3	1017.3	917.4	776.7	649.6	465.9	258.5	8758.3
	2022		183.3	367.5	808.5 ¹	1049.4									
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	4.87	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	4.23
	2022		4.41	4.44	4.33 ¹	4.04									
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	3.55
	2022		3.47	3.42	3.33 ¹	3.44									
Total milk sold for human consumption ²	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
	2021	litres	40.4	38.3	42.1	42.9	46.6	44.7	45.2	44.8	41.7	41.8	40.1	39.7 ¹	506.4 ¹
	2022		40.8 ¹	37.9 ¹	43.2 ¹	43.3									
of which:	2020	million	28.1	25.8	29.1	32.0	31.8	30.6	31.5	28.9	28.7	26.3	25.0	25.1	338.6
	Whole milk sales	litres	25.1	22.4	26.5	27.7	30.8	29.7	30.2	29.0	28.6	25.9	24.6	24.5 ¹	323.1 ¹
	2022		25.0 ¹	23.7 ¹	27.4 ¹	28.2									
Skimmed & semi-skimmed milk sales	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
	2021	litres	15.3	13.9	15.6	15.2	15.8	15.0	15.1	15.8	15.1	15.9	15.5	15.2 ¹	183.3 ¹
	2022		15.8 ¹	14.3 ¹	15.8 ¹	15.0									
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	22.1	17.8	12.2	275.6
	2022		6.7	11.6 ¹	24.4 ¹	29.5									
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	147.7
	2022		5.2	3.4	9.7 ¹	21.2									
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
	2021		2.5	13.1 ¹	31.9 ¹	30.2	32.5 ¹	35.8 ¹	29.7 ¹	28.8 ¹	31.0 ¹	26.0 ¹	18.9 ¹	6.7 ¹	287.0 ¹

□ NATIONAL DAIRY MARKET DEVELOPMENTS: January 2022 – May 2022 (e.g. industrial developments, domestic policy changes, external factors, exports)

- Record Farmer prices. But huge input costs also.
- Domestic Milk Intake by creameries and pasteurisers was estimated at 1049.4 million litres for April 2022. This represents a 1.0% decrease over April 2021.
- Domestic Milk Intake for the period January to April 2022 was estimated at 2,408.7 million litres, a decrease of 16.1 million litres (-0.7%) when compared to the corresponding period for 2021.



- Fat content increased from 3.98% in April 2021 to 4.04 % in April 2022. Protein content decreased from 3.45% to 3.44% for the same period.
- Butter production decreased by 3.3% from 30,500 tonnes in April 2021 to 29,500 tonnes in April 2022.
- Skimmed Milk Powder production increased from 17,700 tonnes in April 2021 to 21,200 tonnes in April 2022.
- New government 'Food Vision Dairy' committee formed to map out the future of Irish dairy over the next decade. Interim report gone to Agri Minister DfT leads the Irish dairy industry delegation.
- Ukraine War has completely 'changed the calculus' of dairy and food production in Ireland and further afield.
- The Irish Protocol continues to be working exceptionally well for dairy across the island.
- Continued worry in Irish dairy circles about politicisation and weaponization of the Protocol by Britain.

- Energy issues a real worry for Irish Dairy processing but we seem to have navigated the 2022 peak.
- Supply chain and transport costs really damaging margins.

□ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2022)**
 (Trends, industrial changes, policy changes, **market expectations**)

- High input costs have driven farmers to assess stock and fodder numbers which has curbed back milk supply despite the record prices.
- Food Vision Dairy Group to meet 2 more times before summer before a final report goes to the Cabinet for possible launch by the Taoiseach (Prime minister)
- Government to formalise legally binding climate targets in advance of summer also.
- Ukraine conflict driving 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 (+/-?): Neutral

Production trends for main products:

Continued move into value-add specialised nutrition products.

US IF shortage has driven higher EU production but there remains 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 perform 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 26% a litre retail increase for commodity liquid fresh milk which is the staple category in Ireland.

Consumption trends have held up well across all categories in Ireland- despite recent price inflation. Liquid milk possibly the only category in decline.

Exports (+/- and why?):

Expectation that volume exports will be stable but huge turnover value increase because of spiralling food inflation.

ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION

- Ukraine war has made huge changes to food production ramifications in the EU and globally.
- Focus needs to be redoubled on encouraging positive sustainable food production in EU both for the internal market and the wider world.
- Energy & Supply chain in dairy processing now a big issue for cost on competitiveness.
- Huge production price inflation allied with huge farm input 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.



uniting dairy excellence & ambition

- 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 THE WAR ON UKRAINE ON THE DAIRY SECTOR

Please indicate and describe the potential ongoing effects of the war on Ukraine on prices, production, and internal market:

Covered at length in previous sections.



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 16 JUNE 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-March 2022 / Jan-March 2021	What are your expectations for deliveries in Q2/22 compared to Q2/21?	What are your expectations for deliveries in Q3/22 compared to Q3/21?
-0,2%	- (deliveries)	- (deliveries)
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q2/21?
Current milk price: 0,47 euro/litre (May)	May 22 / May 21: +27,0%	+ (prices)

⌚ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-March 2022/ Jan-March 2021	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Expectations Q3/22 compared to Q3/21 (+ / - / stable)	May 22 / May 21	Expectations Q2/22 compared to Q1/22 (+ / - / 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	-1,1%	-	-	+24,7%	+	The price refers to Grana Padano 9 months
BUTTER	-0,8%	-	-	+137,7%	+	
WHEY	n.a.	n.a.	n.a.	-1,6%		



⌚ IMPACT OF THE WAR ON UKRAINE ON THE DAIRY SECTOR

Please indicate and describe the potential ongoing effects of the war on Ukraine on prices, production, and internal market:

The war in Ukraine is exacerbating tensions about raw materials, energy and semi-finished products currently used by farmers and processors. Now, finally and unlike in previous months, inflationary pressures are affecting also the consumer prices. On the one hand, this fact better allows to share the burdens all over the supply chain, but on the other and it depresses internal consumption. The risks are not only linked to prices, but also to the real lack of elements which are fundamental to the sector (eg feed). Therefore, the companies are affected by uncertainty, which induces them to be more cautious, most of all in terms of production.

- ⌚ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2022 – March/April/May 2022**
(e.g. industrial developments, domestic policy changes, external factors, exports)
- ⌚ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2022)**
(Trends, industrial changes, policy changes, **market expectations**)
- ⌚ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2022)**

In the 1st quarter of 2022, the overall milk deliveries (3.34 million of tons) have appeared to be stable compared to 2021. However, it has increased the degree of deliveries concentration in some of the major Italian milk producing regions, in particular Lombardy (+2.8%) and Piedmont (+2.3%), while the rest of the country suffered significant contractions.

The caution in production concerned nearly all the main derivatives, starting with creams (-4.6%) and cheeses (-1.1%). With regard to the latter, about 296 thousand tons were produced up to March. The end of the lockdowns and the significant relaxation of restrictions have shrunk retail consumption, while horeca consumption has risen, nevertheless without having returned to pre-Covid levels. The beginning of 2022 has extended to consumption the inflationary pressures emerged in the second half of 2021. The war has aggravated the trend. All this makes uncertain the future domestic demand for milk and dairy products. Within this context, the consumption of products related to health and environmental sustainability remains more dynamic growing constantly.

The conflict threatens not only domestic demand, but Europe's entire post-Covid economic recovery. Therefore, uncertainties in the short-medium term press on exports too, with particular regard to EU countries. Anyway, in absolute terms the Common Market will continue to represent a safe haven for Italian dairy products.

On the other hand, expectations are moderately positive regarding some non-EU areas, which are geographically far from Europe and which are less affected by the market stresses induced by the war. These are the Far East and above all the United States. US are growing again (+20% in 2021). Put behind the extra-tariff war with EU, they can offer great opportunities for Italian products. Despite of that, some other extra-EU markets have suffered a sharp slowdown in recent months. This is the case of Ukraine itself, where in 2021 cheeses exported from Italy (2,400 tons) had marked +43% compared to 2020.



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⌚ ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION

The Italian milk and dairy sector have some concerns about the resumption of EU-NZ free trade agreement negotiations, inaugurated at the end of the French presidency semester and meant to consolidate during the Czech semester. In particular, the easier entry of NZ products could aggravate price tensions. There is also skepticism about the real opportunities that could arise from opening up to EU products a market that is too small and very self-sufficient.



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 16 JUNE 2022

Delegation: THE NETHERLANDS

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-April 2022 / Jan-April 2021	What are your expectations for deliveries in Q2/22 compared to Q2/21?	What are your expectations for deliveries in Q3/22 compared to Q3/21?
-2,3%	Sustained reduction in milk deliveries (ending up between -2% and -3%).	Decreasing volumes, though at a slower pace than in Q2 2022 (ending up between -1% and -2%).
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q2/21?
Current milk price: 48,50 €/100kg (April)	April 22 / April 21: +35%	Strong increase in milk prices because of the significant rise in market prices (reaching record levels!)

⌚ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-March 2022/ Jan-March 2021	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Expectations Q3/22 compared to Q3/21 (+ / - / stable)	May 22 / May 21	Expectations Q2/22 compared to Q1/22 (+ / - / stable)	(Including stocks, consumption, etc...)
SMP	+16,2%	n.a.	n.a.	+54%	n.a.	n.a.
WMP	-28,6%	n.a.	n.a.	+64%	n.a.	n.a.
CHEESE	-3,4%	n.a.	n.a.	+39%*	n.a.	n.a.
BUTTER	-7,5%	n.a.	n.a.	+77%	n.a.	n.a.
WHEY	+19,0%	n.a.	n.a.	+28%	n.a.	n.a.
*April price						



➲ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2022 – May 2022**

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

Export development

Dutch export development in the period January till February 2022 showed a mixed picture. Export volumes of cheese (+2.2%) increased. Trade of butter and butteroil was more or less stable. Exports of whole milk powder (-12.9%) and skimmed milk powder (-16.3%) however decreased significantly. Because of the sharp rise in market prices the Dutch export value increased significantly by 19.6% to € 1.4 billion.

Political development

The cabinet Rutte IV has allocated 25 billion euros for agricultural transition. The Dutch government opts for an integrated approach to nitrogen, water quality, soil, climate and biodiversity. In 2030 nitrogen emissions have to be reduced by 50%. This will have a big impact on livestock numbers in the Netherlands, possibly leading to a decline of livestock by 30% (all animal types).

In May the Dutch government has announced what the first two voluntary buy-out schemes for livestock farmers will look like. In the first instance, 0.75 billion euros is available for this.

Phosphate and nitrogen excretion by dairy cattle below ceiling in Q1 2022

According to statistics Netherlands' calculations, the dairy farming sector will remain below the nitrogen and phosphate ceiling in the first quarter of 2022. The sector remains 8 percent below the phosphate ceiling and 2.4 percent below the nitrogen ceiling.

Processing industry developments

-FrieslandCampina is planning to merge its Dutch production and logistics for fresh-dairy in Rotterdam with its production for fresh-dairy in Maasdam and to close two milk powder towers in Leeuwarden.

-On Tuesday, March 15, the Belgian court declared the bankruptcy of Hollebeekhoeve (fresh dairy products) in Kruibeke (Belgium). Royal A-ware has reached an agreement with the trustee concerning the takeover of the facilities.

-Belgian dairy company Olympia and Royal A-ware are to enter into a far-reaching collaboration, with Royal A-ware taking over Olympia's shares. Olympia, which produces a wide range of dairy products (milk, milk concentrate, fresh and long-life cream, butter, desserts, bases for ice cream preparations etc.) will become part of the Royal A-ware group.

- Royal A-ware and Noordhoek (grated cheese) recently signed an agreement under which Noordhoek will be taken over by Royal A-ware. The proposed takeover has been submitted to the Netherlands Competition Authority (NMa) for approval.

-Klaver Kaas expands with a new cheese factory. This company produces speciality cheeses and will process up to 20 million litres milk at full capacity.



⌚ NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2022)

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

Market expectations

The dairy market is currently strongly influenced by two factors, global milk supply lagging behind expectations and extremely high input prices (feed, energy etc.) for the whole dairy chain because of the war in the Ukraine. It is not expected that market fundamentals will change in the coming months. Because of this market prices will presumably stay at the current record levels. Possibly the very high prices will result in lower demand, because customers in the poorer export markets can't afford to buy the products anymore. This could give some downward pressure on market prices later in the year.

⌚ 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

Food security

⌚ IMPACT OF THE WAR ON UKRAINE ON THE DAIRY SECTOR

Please indicate and describe the potential ongoing effects of the war on Ukraine on prices, production, and internal market:

Please see text of market expectations



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 16 JUNE 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-April 2022 / Jan-April 2021	What are your expectations for deliveries in Q2/22 compared to Q2/21?	What are your expectations for deliveries in Q3/22 compared to Q3/21?
+2,77%	increase (deliveries)	increase (deliveries)
Milk price evolution		What are your expectations for prices in Q2/22 compared to Q2/21?
Current milk price: 45,63 EUR / 100kg	April 22 / April 21: +40,2%	increase (prices)

⌚ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-March 2022/ Jan-March 2021	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Expectations Q3/22 compared to Q3/21 (+ / - / stable)	April 22 / April 21	Expectations Q2/22 compared to Q1/22 (+ / - / stable)	(Including stocks, consumption, etc...)
SMP	+6,50%	+	+	+64,22%	+	
WMP	+3,89%	+	+	+62,92%	+	
CHEESE	-2,96%	+	-	+42,17%	Stable	
BUTTER	-4,42%	+	-	+70,55%	Stable	
WHEY	ND	ND	ND	+49,09%	+	



⌚ NATIONAL DAIRY MARKET DEVELOPMENTS: January 2022 – May 2022
 (e.g. industrial developments, domestic policy changes, external factors, exports)

CN	EXPORTS (INCL. 3rd countries)					
	Value ['000 EUR]		Value ['000 PLN]		Volume [tons]	
	I-III 2021	I-III 2022	I-III 2021	I-III 2022	I-III 2021	I-III 2022
Total	552 755	751 638	2 491 844	3 413 940	436 329	428 614
0401	120 295	155 322	542 276	705 263	224 737	213 257
0402	76 982	126 744	346 980	575 070	34 525	39 283
0403	33 092	42 695	149 185	194 121	27 603	31 522
0404	52 748	64 010	237 829	290 959	64 998	55 895
0405	47 385	106 957	213 643	485 707	12 935	18 912
0406	222 253	255 910	1 001 930	1 162 820	71 533	69 743

⌚ NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2022)
 (Trends, industrial changes, policy changes, market expectations)

General inflation (officially 13,9% in May 2022).

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

Expected evolution in milk supply (+/-?): whether and feed costs might have negative impact on deliveries

Production trends for main products: production of milk powders might increase, but when it comes to other products future is uncertain

Consumption trends: due to high number of refugees in Poland it is possible that consumption will increase

Exports (+/- and why?): weak Polish currency favours Polish exporters, so exports is likely to increase

⌚ ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION

⌚ IMPACT OF THE WAR ON UKRAINE ON THE DAIRY SECTOR

Please indicate and describe the potential ongoing effects of the war on Ukraine on prices, production, and internal market:

Prices of energy, fertilizers and feed have increased rapidly, but on the other hand it is possible that influx of refugees to Poland might bring positive impact on internal consumption of dairy products.



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 16 JUNE 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-April 2022 / Jan-April 2021		What are your expectations for deliveries in Q2/22 compared to Q2/21?	What are your expectations for deliveries in Q3/22 compared to Q3/21?
- 0,3%		Decrease	Decrease
Milk price evolution			What are your expectations for prices in Q2/22 compared to Q2/21?
Current milk price: 0,420€/L (April 22)	April 22 / April 21: +25%		Increase

⌚ DAIRY PRODUCTS DEVELOPMENT

	Production		Price		COMMENT
	Jan-March 2022/ Jan-March 2021	Expectations Q2/22 compared to Q2/21 (+ / - / stable)	Expectations Q3/22 compared to Q3/21 (+ / - / stable)	May 22 / May 21	Expectations Q2/22 compared to Q1/22 (+ / - / stable)
SMP					(Including stocks, consumption, etc...)
WMP					
CHEESE					
BUTTER					
WHEY					



⌚ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2022 – May 2022**
(e.g. industrial developments, domestic policy changes, external factors, exports)

High pressure of the farmers due to the increase of costs (energy and animal feed mainly). Milk price to farmers increased 25% (April 2022 Vs. April 2021). Obviously, costs also increased for processors (energy, transport, etc.). summing up, difficulties for processors, farmers and for the whole society.

Exceptional aid of the Government for dairy farmers (169 mill. €).

It took place a violent strike of the transport sector during 3 weeks of April. This issue had a very big impact on the dairy sector, not only for deliveries, but also for distributing products to retailers.

Dairy products prices for consumers increased during the last months significantly. Therefore, consumers prefer cheaper products (increase of private label).

Difficulties for export due to high price of freights.

Positive expectations for HORECA in the coming months boost by tourism.

⌚ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2022)**
(Trends, industrial changes, policy changes, **market expectations**)

Uncertainty due to the increase of costs. Negative expectations for deliveries.

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 THE WAR ON UKRAINE ON THE DAIRY SECTOR**



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MARKET SITUATION

BY M. WOHLFARTH, ZMB



Market Information
 for the
EDA Trade & Economics Committee
June 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 census, '000head)	(December	23.313	22.908	22.633	22.421	20.536	20.219	20.000
Milk Deliveries to dairies		155.887	157.350	158.283	160.629	145.204	144.756	144.990
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	2.220	2.190
Consumption		2.155	2.151	2.180	2.215	1.997	2.025	2.030
Cheese Production ⁴⁾		10.610	10.726	10.904	11.060	10.572	10.670	10.750
Consumption ⁵⁾		9.850	9.932	10.107	10.180	9.382	9.500	9.550
Skim Milk Powder Production		1.689	1.671	1.668	1.706	1.628	1.560	1.520
Consumption		910	950	940	920	910	880	860
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 Population (million head)		5.550	5.700	5.710	5.730	5.700	5.800	5.850
		511	512	513	514	447	448	452

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 May 2022

Milk Supplies

Table 2

EU: Cow Milk Deliveries to Dairies

'000 tonnes	2017	2018	2019	2020	2021x	Forecast 2022
EU 27_2020	140.738	142.158	142.850	145.204	144.756	144.990
EU 28	155.887	157.350	158.283	160.656	160.203	160.190
EU 27_2007	155.411	156.897	157.848	160.222	159.774	159.780
EU 25	153.804	155.134	156.071	158.393	157.969	158.030
EU 15	132.998	134.027	134.714	136.473	135.922	135.510
EU 10	9.153	9.144	9.174	9.486	9.566	9.720
EU 2	1.607	1.763	1.777	1.829	1.805	1.750
Belgium	3.925	4.079	4.177	4.329	4.308	4.400
Bulgaria	579	643	652	694	679	650
Czech Rep.	2.984	3.057	3.034	3.192	3.129	3.150
Denmark	5.494	5.615	5.615	5.666	5.644	5.700
Germany	31.937	32.491	32.442	32.552	31.942	31.600
Estonia	727	748	763	788	799	830
Greece	603	621	633	652	660	660
Spain	7.028	7.117	7.251	7.409	7.478	7.500
France	24.579	24.589	24.535	24.584	24.208	24.000
Ireland	7.480	7.813	8.226	8.545	9.017	9.300
Italy	11.902	12.071	12.117	12.668	13.057	13.200
Cyprus	216	228	239	274	298	300
Latvia	832	781	785	791	813	830
Lithuania	1.403	1.367	1.358	1.360	1.349	1.400
Luxembourg	374	395	409	435	s 445	s 450
Hungary	1.545	1.535	1.576	1.626	1.727	1.750
Croatia	477	453	436	434	429	410
Malta	41	40	41	43	40	40
Netherlands	14.296	13.881	13.802	13.987	13.599	13.300
Austria	3.200	3.183	3.140	3.137	3.154	3.300
Poland	11.652	11.963	12.183	12.434	12.481	12.800
Portugal	1.848	1.867	1.899	1.923	1.909	1.900
Romania	1.028	1.120	1.125	1.135	1.126	1.100
Slovenia	579	571	564	580	589	600
Slovakia	826	817	814	834	823	820
Finland	2.366	2.354	2.330	2.362	2.272	2.250
Sweden	2.817	2.760	2.704	2.773	2.782	2.750
UK	15.149	15.193	15.433	15.452	15.447	15.200

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

Updated May 2022

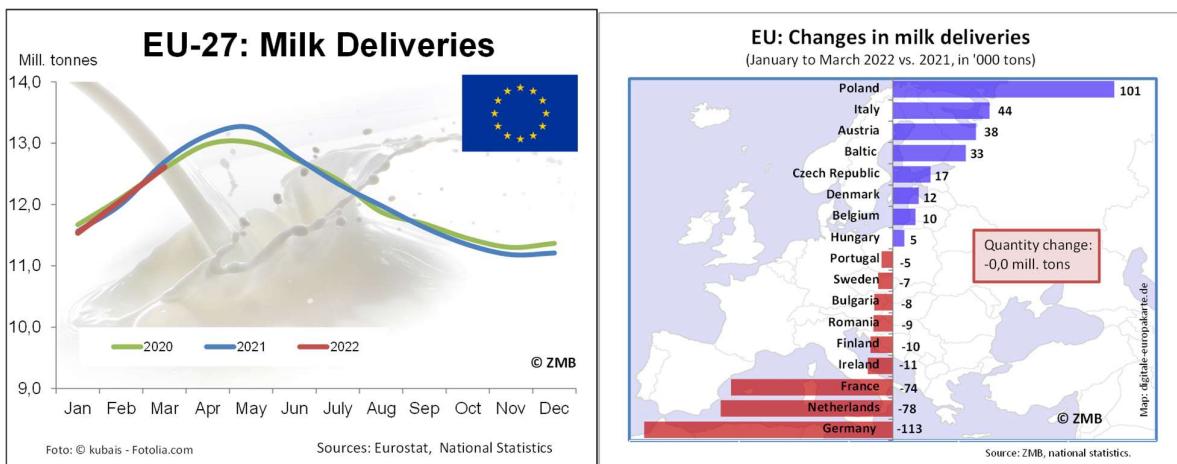


Table 3

EU Milk Deliveries 000 t	January - March		Mar. 22:21 *	
	2021	2022*	22:21 *	22:21 *
Belgium	1.085	1.095	+ 0,9%	+ 0,8%
Bulgaria	165	156	- 5,1%	- 6,7%
Czech Rep.	775	792	+ 2,2%	+ 2,1%
Denmark	1.388	1.400	+ 0,9%	+ 0,6%
Germany	8.048	7.938	- 1,4%	- 1,4%
Baltic States	678	712	+ 4,9%	+ 4,1%
Greece	169	166	- 2,2%	- 3,0%
Spain	1.864	1.869	+ 0,3%	- 1,6%
France	6.230	6.156	- 1,2%	- 1,2%
Ireland	1.405	1.394	- 0,8%	- 3,3%
Italy	3.349	3.393	+ 1,3%	.
Croatia	110	106	- 3,5%	- 3,8%
Hungary	439	444	+ 1,2%	- 1,2%
Netherlands	3.484	3.406	- 2,3%	- 2,5%
Austria	807	845	+4,7%	+ 4,2%
Poland	3.102	3.202	+ 3,3%	+2,5%
Portugal	480	474	- 1,1%	-0,6%
Romania	264	255	- 3,3%	-4,7%
Slovenia	147	147	+ 0,1%	-0,5%
Slovakia	209	209	+ 0,1%	+0,4%
Finland	580	570	- 1,8%	-1,6%
Sweden	713	707	- 0,9%	-1,3%
EU-27	35.679	35.622	- 0,2%	-0,7%

*) Provisional/ Estimate.

Sources: ZMB, national statistics.

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Table 4

Milk Output in different countries				
000 t	January-	2021	2022*	22:21*
U. Kingdom	Mar.	3.856	3.781	-1,9%
Switzerland	Mar.	871	844	-3,0%
Serbia	Mar.	235	213	-9,3%
Europe without EU	cum.	4.962	4.839	-2,5%
Russia ¹⁾	Mar.	6.871	6.984	+1,6%
Belarus ¹⁾	Mar.	1.828	1.862	+1,9%
Kasachstan ¹⁾	Mar.	975	989	+1,3%
Ukraine ¹⁾	Jan.	530	522	-1,5%
4 CIS countries	cum.	10.204	10.357	+1,5%
Canada	Mar.	2.428	2.371	-2,4%
USA ¹⁾	Apr.	34.563	34.218	-1,0%
Mexico	Mar.	3.098	3.138	+1,3%
North America	cum.	40.089	39.727	-0,9%
Argentina ¹⁾	Mar.	2.624	2.665	+1,6%
Brazil	Mar.	6.630	6.060	-8,3%
Chile	Mar.	592	568	-4,0%
Uruguay	Mar.	451	446	-1,0%
Peru	Mar.	549	556	+1,3%
South America	cum.	10.845	10.296	-5,1%
Australia ¹⁾	Mar.	2.068	1.947	-5,8%
New Zealand ¹⁾	Mar.	7.764	7.335	-5,5%
Oceania	cum.	9.832	9.282	-5,6%
Asian countries:				
Türkei	Mar.	2.560	2.484	-3,0%
Japan	Mar.	1.866	1.921	+2,9%

1) Milk production. 2) January to September. 3) January to November. *) Provisional/ Estimate

3) Delivery of 18 dairies, which handle ca. 68% of the quantities of milk.

3) January to December 2016/17.

Sources: ZMB, national statistics.

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Table 5

EU-27: Production of Dairy Products				
	January - February		Feb.	
000 t	2021	2022*	22:21 *	22:21 *
Liquid milk	3.949	3.921	-0,7%	-1,0%
Cream	380	393	+3,4%	+4,1%
Fermented Products	1.383	1.395	+0,9%	+2,1%
Butter	340	337	-1,0%	+2,6%
Cheese	1.488	1.495	+0,5%	+0,7%
WMP etc.	103	100	-2,4%	-3,6%
SMP	243	225	-7,2%	-4,7%
Condensed milk	160	156	-2,4%	-1,6%

*) Provisional.

Sources: ZMB, Eurostat, national statistics.

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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	23.650	23.400
Imports	4	6	9	95	90	100
Exports	727	892	1.004	1.049	1.096	1.000
Sales	29.587	28.798	29.233	22.933	22.644	22.500
Per capita (kg)	57,7	56,1	56,8	51,3	50,5	49,8

*)Provisional **) Estimation/Forecast.

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

Updated May 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	2.190
- in dairies ¹⁾	2.322	2.382	2.428	2.234	2.200	2.170
- 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	2.030
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 May 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	10.590
- from cows' milk in dairies	9.526	9.744	9.910	9.437	9.520	9.600
- 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	10.950
Exports	833	880	943	1.402	1.390	1.400
-thereof to UK	.	.	.	493	430	460
Stock Change	20	-20	0	10	-20	0
Consumption	9.932	10.107	10.180	9.382	9.500	9.550
- per capita (kg)	19,4	19,7	19,8	21,0	21,2	21,1

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

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

Source: ZMB

Updated May 2022

Table 9

'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	1.100	1.000
Imports	1	1	1	34	36	30
-thereof from UK	.	.	.	33	36	30
Exports	276	276	279	338	341	330
-thereof to UK	.	.	.	60	50	45
Change in stocks	0	50	120	50	50	-40
Consumption	795	810	814	727	745	740

*)Provisional **) Forecast.

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

Source: ZMB

Updated May 2022

Table 10

'000 t	2018 EU 28	2019 EU28	2020* EU 28	2020* EU-27	2021* EU-27	2022** EU-27
Opening stocks	530	438	209	205	128	51
Production	1.671	1.668	1.706	1.628	1.560	1.520
Imports	4	6	2	36	33	20
-thereof from UK	.	.	.	34	23	18
Available	2.204	2.111	1.917	1.869	1.721	1.591
Consumption	950	940	920	910	880	860
- other than feed	800	800	800	790	780	780
- in feed	150	140	120	120	100	80
Exports	816	962	828	831	790	680
-thereof to UK	.	.	.	28	15	10
Ending stocks	438	209	169	128	51	51
- in intervention	176	0	0	0	0	0

*)Provisional **) Forecast.

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

Source: ZMB

Updated May 2022

Table 11

'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	2.200
Imports	22	15	52	45	40
-thereof from UK	.	.	37	31	30
Exports	598	651	691	720	700
-thereof to UK	.	.	56	40	40
Stock change	60	0	-30	-20	0
Consumption	1.544	1.544	1.516	1.545	1.540

Partly desugared and demineralised whey powder included.

*) Estimated. **) Forecast.

Source: ZMB

Updated May 2022

Table 12

'000 t	2019*	2020**	2020**	2021**	2022**
	EU 28	EU 28	EU 27	EU 27	EU 28
Production¹⁾	172	175	177	182	185
Import	18	17	15	15	12
-thereof from UK	.	.	3	2	2
Exports	92	92	95	105	98
-thereof to UK	.	.	4	4	4
Stock change ²⁾	2	0	-2	-8	2
Consumption	96	100	99	100	97

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

2) Total stocks (manufacturers and users)

Source: ZMB

Updated May 2022

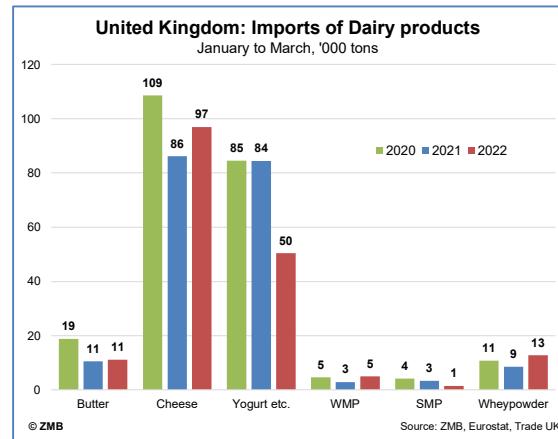
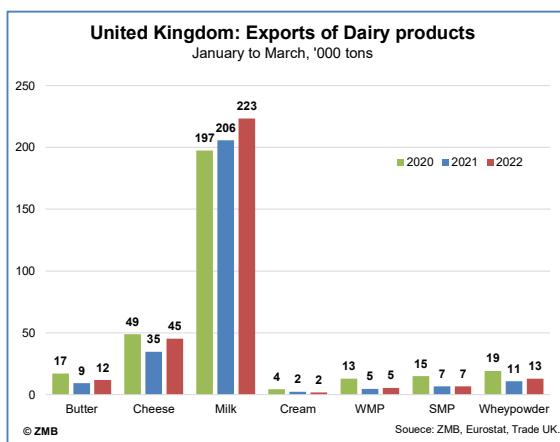
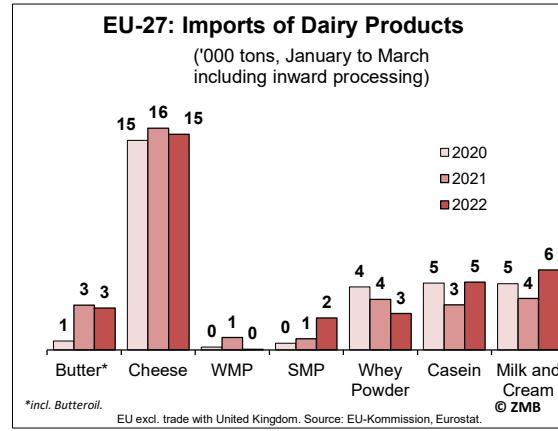
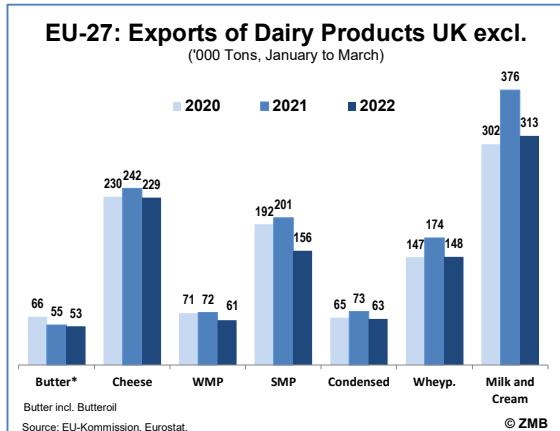


Table 13
EU: Exports of Butter <85%¹⁾

'000 t	Months	2019		2020		2021		Months	2021		2022
		EU-27 ²⁾		EU-27 ³⁾	EU-27 ³⁾						
Belgium	12	13,9		18,1		12,5	3	3,8	2,3	2	0,2
Denmark	12	27,7		29,3		29,0	3	5,9	6,6	2	1,2
Germany	12	18,1		14,1		13,8	3	4,1	3,8	2	0,0
Spain	12	1,0		1,8		1,7	3	0,2	0,3	2	0,0
France	12	40,3		41,4		44,1	3	9,6	11,3	2	0,6
Ireland	12	97,2		97,7		78,4	3	10,8	8,0	2	1,5
Lithuania	12	1,9		4,8		1,1	3	0,3	0,1	2	0,0
Netherlands	12	30,9		31,8		27,3	3	6,2	6,2	2	0,0
Portugal	12	2,2		6,7		4,7	3	0,7	1,2	2	0,0
Poland	12	7,5		13,2		7,1	3	1,9	1,1	2	0,2
Finland	12	4,4		5,3		4,4	3	1,6	1,6	2	.
All other	12	2,5		4,1		3,4	3	0,7	0,8	2	0,0
EU	12	247,4		268,2		227,6	3	45,8	43,3	2	3,8
											7,4

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	2021	Months	2021	2022	Months	2021	2022
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ³⁾	EU-27 ³⁾		Export to UK	
Belgium	12	5,5	4,5	4,1	3	1,3	1,2	2	0,1	0,0
Spain	12	0,7	0,6	0,4	3	0,2	0,1	2	.	.
France	12	7,2	6,8	7,0	3	2,4	2,3	2	0,0	0,0
Ireland	12	9,2	4,9	4,2	3	0,1	0,2	2	0,6	0,6
Netherlands	12	18,6	19,0	11,8	3	2,9	3,3	2	0,4	0,3
Sweden	12	0,0	0,0	0,0	3	0,0	0,0	2	.	.
All other	12	2,6	2,2	2,5	3	0,5	0,9	2	0,0	0,0
EU	12	43,8	38,0	30,0	3	7,4	8,0	2	1,2	0,9

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 Butteroil¹⁾

'000 t	Months	2019	2020	2021	Months	2021	2022	Months	2021	2022
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ³⁾	EU-27 ³⁾		Import from UK	
Belgium	12	29,5	18,6	12,0	3	0,0	0,0	2	3,3	0,1
Denmark	12	5,6	2,8	6,6	3	1,7	1,7	2	0,2	0,0
France	12	6,9	3,9	8,9	3	1,0	0,8	2	0,2	1,8
Netherlands	12	10,3	8,4	11,6	3	0,3	0,2	2	0,4	3,4
All other	12	24,2	17,6	11,3	3	0,1	0,2	2	0,8	1,8
EU	12	76,6	51,3	50,4	3	3,2	3,0	2	4,9	7,1

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.	2020	2021	2022	± %
<i>EU - 27*</i>	<i>I - III</i>	<i>66,4</i>	<i>54,7</i>	<i>52,9</i>	<i>- 3,3</i>
<i>United Kingdom</i>	<i>I - III</i>	<i>17,0</i>	<i>9,5</i>	<i>11,8</i>	<i>+ 24,4</i>
<i>- of which to EU-27</i>	<i>I - III</i>	<i>14,0</i>	<i>8,8</i>	<i>11,0</i>	<i>+ 24,8</i>
New Zealand	I - III	122,5	124,6	119,2	- 4,3
Australia	I - III	2,3	6,3	5,8	- 8,5
USA	I - III	5,6	11,9	19,7	+ 66,4
Switzerland	I - II	0,1	0,1	.	-.
Belarus	I - II	8,7	11,4	10,0	- 12,3
Ukraine	I - II	0,5	2,0	.	-.
Argentina	I - II	3,5	5,6	5,8	+ 4,8
Uruguay	I - IV	1,5	4,1	5,2	+ 26,1
Mexico	I - III	.	0,1	6,9	+ 4938,7
India	I - II	.	2,2	13,0	+ 502,0
Total amount*		215,4	223,7	239,3	+ 7,0

* Excluding trade between EU-27 and United Kingdom.

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

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Table 17
EU: Exports of Cheese¹⁾

' 000 t	Months	2019	2020	2021	Months	2021	2022	Months	2021	2022
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾	EU-27 ³⁾	EU-27 ³⁾	EU-27 ³⁾		Export to UK	
Belgium	12	44,4	49,8	68,2	3	4,8	5,7	2	7,1	7,3
Bulgaria	12	7,9	8,4	10,1	3	2,3	2,3	2	0,2	0,2
Czech Rep.	12	5,6	5,1	8,5	3	1,6	1,6	2	0,2	0,1
Denmark	12	126,1	137,3	137,3	3	24,4	20,3	2	5,5	6,8
Greece	12	22,4	24,0	25,2	3	3,1	3,1	2	1,6	1,6
Spain	12	33,9	25,9	29,3	3	5,5	6,3	2	0,3	0,9
Germany	12	205,2	223,9	212,0	3	45,9	38,7	2	5,9	8,1
France	12	203,1	186,4	178,9	3	28,5	28,9	2	8,9	8,9
Ireland	12	207,5	203,2	163,9	3	12,1	10,3	2	4,2	8,5
Italy	12	149,8	147,2	161,5	3	26,7	30,8	2	5,1	6,1
Lithuania	12	16,0	17,2	17,1	3	2,9	3,3	2	0,1	0,1
Hungary	12	11,9	13,8	14,6	3	4,0	4,1	2	0,1	0,4
Netherlands	12	174,8	191,2	193,0	3	40,2	46,0	2	2,6	4,4
Austria	12	20,6	21,7	21,9	3	4,9	5,5	2	0,2	0,2
Poland	12	67,7	88,7	87,4	3	19,5	14,6	2	3,0	2,5
Finland	12	6,3	6,4	5,3	3	1,3	1,0	2	.	.
All other	12	44,5	51,3	50,7	3	6,4	6,4	2	3,8	4,3
EU	12	1.347,8	1.401,6	1.385,1	3	234,1	228,9	2	48,7	60,5

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.	2020	2021	2022	± %
EU - 27*	I - III	230,3	241,5	228,9	- 5,2
United Kingdom	I - III	48,8	34,8	45,2	+ 30,1
- of which to EU-27	I - III	39,9	25,8	36,8	+ 42,8
Switzerland	I - III	18,7	19,6	18,4	- 6,0
New Zealand	I - III	89,5	103,7	96,0	- 7,4
Australia	I - III	36,0	38,9	41,4	+ 6,4
USA	I - III	92,1	92,3	104,1	+ 12,7
Belarus	I - II	42,6	45,4	50,8	+ 12,0
Argentina	I - II	11,1	13,9	11,1	- 20,0
Uruguay	I - IV	9,1	8,3	7,8	- 5,1
Turkey	I - II	8,9	5,5	.	.
Total amount*		547,3	578,0	573,3	- 0,8

* Excluding trade between EU-27 and United Kingdom.

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

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Table 19

EU: Exports of Condensed and Evaporated Milk¹⁾

' 000 t	Months	2019	2020	2021	Months	2021	2022	Months	2021	2022
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ³⁾	EU-27 ³⁾			
Belgium	12	28,9	26,4	31,7	3	3,4	3,9	2	2,5	3,1
Germany	12	70,5	66,0	58,1	3	8,7	10,3	2	1,1	1,3
Spain	12	25,1	27,6	27,0	3	7,0	4,5	2	0,3	0,3
France	12	2,2	3,1	1,3	3	0,4	0,3	2	0,0	0,0
Litauen	12	8,1	11,8	15,5	3	4,1	1,1	2	0,1	0,0
Netherlands	12	189,7	193,6	197,1	3	46,4	42,2	2	3,0	1,9
Poland	12	4,0	4,7	3,1	3	0,3	0,2	2	0,2	0,1
All other	12	3,6	5,2	7,3	3	2,6	0,6	2	0,1	0,1
EU	12	332,1	338,3	341,1	3	72,9	63,1	2	7,3	6,8

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 Powder^{1) 2)}

' 000 t	Months	2019	2020	2021	Months	2021	2022	Months	2021	2022
		EU-27 ³⁾	EU-27 ³⁾	EU-27 ³⁾		EU-27 ⁴⁾	EU-27 ⁴⁾			
Belgium	12	28,9	47,8	24,7	3	7,4	2,2	2	0,0	0,1
Czech Rep.	12	3,8	2,9	2,4	3	0,9	0,8	2	0,0	0,0
Denmark	12	46,7	43,3	48,6	3	13,2	11,8	2	0,0	.
Germany	12	17,2	19,2	13,9	3	4,1	8,9	2	0,1	0,2
France	12	35,1	39,9	42,7	3	9,5	7,1	2	1,3	1,3
Ireland	12	30,7	44,0	31,2	3	2,1	3,2	2	0,1	0,3
Netherlands	12	115,1	109,6	99,1	3	23,6	19,0	2	0,5	0,5
Poland	12	6,1	8,4	5,2	3	2,0	0,9	2	0,0	0,0
Sweden	12	18,1	19,4	20,4	3	6,5	5,6	2	.	0,0
All other	12	13,7	10,4	10,0	3	2,4	1,7	2	0,1	0,0
EU	12	315,4	344,8	298,1	3	71,7	61,2	2	2,2	2,3

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.	2020	2021	2022	± %
EU - 27*	I - III	70,9	71,7	61,2	- 14,7
United Kingdom	I - III	12,8	4,6	5,5	+ 19,0
- of which to EU-27	I - III	9,1	1,4	4,3	+ 208,4
New Zealand	I - III	415,4	461,6	375,5	- 18,7
Australia	I - III	9,9	10,8	17,7	+ 64,1
USA	I - III	9,5	10,3	9,1	- 11,6
Belarus	I - II	2,9	4,1	4,8	+ 17,2
Argentina	I - II	25,9	28,4	29,3	+ 3,3
Uruguay	I - IV	37,9	43,1	39,5	- 8,3
Total amount*		576,1	633,1	538,2	- 15,0

* Excluding trade between EU-27 and United Kingdom.

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

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Table 22
EU: Exports Skim Milk Powder¹⁾

' 000 t	Months	2019	2020	2021	Months	2021	2022	Months	2021	2022
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ³⁾	EU-27 ³⁾			
Belgium	12	190,6	150,9	138,9	3	41,2	37,7	2	0,0	0,0
Czech Rep.	12	11,7	10,9	9,9	3	2,6	2,4	2	0,0	0,0
Denmark	12	17,0	12,4	7,9	3	1,9	1,7	2
Germany	12	168,5	142,7	116,6	3	30,2	20,0	2	0,0	0,0
Spain	12	19,3	10,6	12,6	3	1,6	0,9	2	..	0,0
France	12	172,9	158,5	162,6	3	44,4	31,2	2	0,5	0,3
Ireland	12	97,8	96,7	87,0	3	14,6	9,5	2	0,6	1,3
Latvia	12	1,0	0,5	0,4	3	0,2	0,1	2
Lithuania	12	20,8	18,3	13,6	3	3,9	2,0	2
Netherlands	12	100,4	85,2	78,8	3	21,9	19,7	2	0,1	0,0
Poland	12	84,8	80,4	71,7	3	18,6	14,2	2	0,0	0,0
Finland	12	31,3	36,4	37,0	3	10,9	9,1	2
Sweden	12	19,4	18,7	32,3	3	7,9	6,5	2	0,0	0,0
All other	12	9,9	8,9	5,1	3	1,4	1,0	2	0,0	0,0
EU	12	945,5	831,0	774,4	3	201,3	156,0	2	1,3	1,8

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.	2020	2021	2022	± %
EU - 27*	I - III	192,5	201,3	156,0	- 22,5
United Kingdom	I - III	14,9	6,8	6,7	- 1,9
- of which to EU-27	I - III	9,1	4,0	2,2	- 45,5
New Zealand	I - III	109,0	88,3	98,9	+ 12,0
Australia	I - III	33,2	44,6	51,6	+ 15,6
USA	I - III	184,6	221,0	203,0	- 8,2
Canada	I - III	13,0	4,6	6,5	+ 39,0
Turkey	I - III	4,0	5,4	22,2	+ 310,8
Iran	I - III	.	5,5	18,5	+ 234,8
Belarus	I - II	16,7	17,2	17,7	+ 2,9
Argentina	I - II	5,0	5,5	4,0	- 26,5
Uruguay	I - IV	3,5	3,9	8,9	+ 129,8
Total amount*		567,3	600,0	591,7	- 1,4

* Excluding trade between EU-27 and United Kingdom.

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

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Table 24
EU: Exports of Whey Powder¹⁾

1.000 t	Months	2019	2020	2021	Months	2021	2022	Months	2021	2022
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾	EU-27 ³⁾	EU-27 ³⁾	EU-27 ³⁾			
Belgium	12	10,2	8,8	4,7	3	1,6	1,1	2	0,0	0,0
Czech Rep.	12	24,1	23,2	26,5	3	6,6	7,2	2	0,0	.
Denmark	12	10,0	10,3	8,0	3	1,5	2,3	2	.	.
Germany	12	114,1	112,2	120,9	3	33,0	30,6	2	0,7	1,0
Estonia	12	2,7	2,5	1,8	3	0,6	0,3	2	.	.
Spain	12	20,9	24,8	29,6	3	6,6	4,5	2	0,0	0,1
France	12	156,7	155,3	190,5	3	48,8	44,4	2	0,3	0,2
Ireland	12	74,5	82,2	80,4	3	6,3	6,7	2	2,1	3,3
Latvia	12	8,8	6,9	7,5	3	5,1	4,2	2	.	.
Lithuania	12	15,5	20,8	21,3	3	1,7	0,9	2	0,0	.
Netherlands	12	62,7	82,1	70,8	3	16,5	12,6	2	0,1	0,9
Austria	12	4,5	4,9	2,4	3	1,0	0,6	2	0,0	.
Poland	12	98,7	120,3	107,9	3	34,0	20,4	2	0,0	0,0
Finland	12	14,1	17,8	16,9	3	4,3	5,3	2	.	.
Other	12	20,6	20,2	25,2	3	6,2	6,9	2	0,0	0,1
EU	12	638,1	692,2	714,5	3	173,8	148,0	2	3,3	5,5

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.	2020	2021	2022	± %
EU - 27*	I - III	147.242	173.776	148.028	- 14,8
United Kingdom	I - III	19.112	10.817	12.759	+ 18,0
- of which to EU-27	I - III	16.283	6.802	9.770	+ 43,6
USA (Whey products)	I - III	110.659	140.018	131.586	- 6,0
- Whey Powder	I - III	46.122	60.683	46.517	- 23,3
- WPC	I - III	31.742	37.813	38.412	+ 1,6
- Mod Whey	I - III	32.796	41.522	46.657	+ 12,4
Australia	I - III	8.942	9.977	7.619	- 23,6
Argentina	I - II	7.945	10.420	9.417	- 9,6
Canada	I - III	16.385	17.626	18.676	+ 6,0
Turkey	I - III	13.353	27.302	14.379	- 47,3
Total amount*		307.355	383.133	332.694	- 13,2

* Excluding trade between EU-27 and United Kingdom.

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

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#

Table 26

EU: Exports of Casein and Caseinates to 3rd countries

000 t	Months	2019		2020		2021		Months	2021	2022
		EU-27 ¹⁾	EU-27 ¹⁾	EU-27 ¹⁾	EU-27 ¹⁾	EU-27 ²⁾	EU-27 ²⁾			
Denmark	12	0,0	0,0	0,1	3	0,0	0,2	2	.	0,0
France	12	24,3	24,5	24,1	3	7,0	4,9	2	0,0	0,0
Netherlands	12	2,3*	2,7*	2,5*	3	0,4*	0,7*	2	0,0*	0,0*
Germany	12	13,3	11,8	14,3	3	3,2	3,0	2	0,0	0,0
Ireland	12	35,0	36,3	44,3	3	5,3	4,8	2	0,3	0,3
Poland	12	8,1	7,0	7,4	3	1,8	1,9	2	0,0	0,0
All other	12	5,4	4,5	6,3	3	0,7	0,6	2	0,0	0,0
EU-28¹⁾	12	88,4	86,8	99,0	3	18,4	16,1	2	0,4	0,4

**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 - March**

000 t	2021	2022*	22:21 *
Casein, France	12,3	12,1	- 1,5%
Casein, Ukraine**	0,2	0,5	+ 165,5%
MPC, USA	25,4	27,9	+ 9,9%
WPC, USA	53,5	58,6	+9,6%
WPI, USA	14,8	15,5	+4,9%
Laktose, USA	121,6	131,3	+8,0%

*) Provisional. **) January to January.

Sources: ZMB, national statistics.

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Table 28

Imports of Casein and Caseinates**Jan. to Mar.**

' 000 t	2019	2020	2021	2021	2022
EU-27 (Incl IP.)¹⁾	19,2	18,5	17,0	2,2	2,9
USA	68,8	66,4	75,0	18,4	23,2
- from					
total EU	37,6	36,1	38,7	7,8	10,7
- Ireland	15,8	15,6	15,4	2,9	5,3
- France	5,4	5,8	6,4	1,6	1,7
- Germany	2,1	1,1	1,2	0,2	0,2
- Netherlands	7,0	6,4	7,5	1,7	1,9
- Poland	4,1	3,0	3,3	0,7	0,6
- Other M. C.	3,3	4,2	4,9	0,7	1,0
India	2,1	0,7	2,2	0,6	1,6
New Zealand	24,6	23,7	27,0	7,8	8,0
Japan	13,5	12,5	13,0	3,1	3,8
China	24,4	29,7	39,3	10,0	8,4
Mexico¹⁾	21,4	22,9	.	2,4	1,4
South Korea	7,9	7,8	8,7	2,1	3,4
Malaysia¹⁾	4,7	4,5	5,3	1,0	0,7
Thailand	5,5	5,9	5,3	1,1	1,5
Indonesia¹⁾	8,7	9,6	.	1,3	1,4

1) January to February.

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

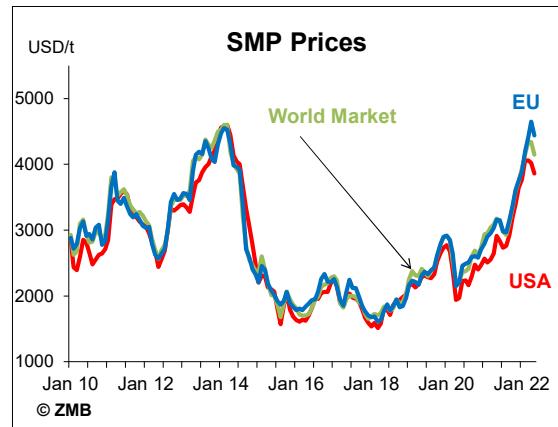
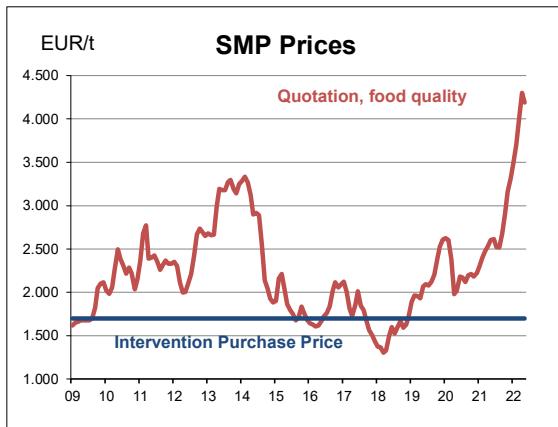
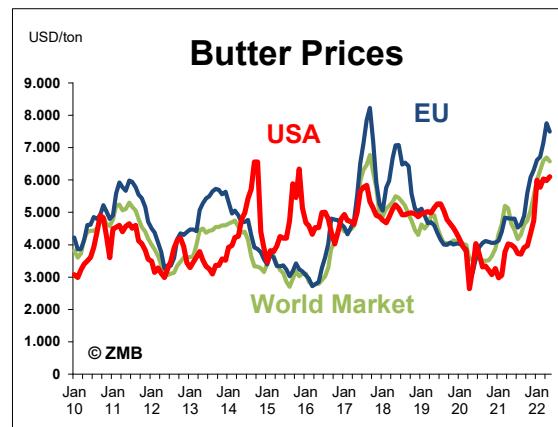
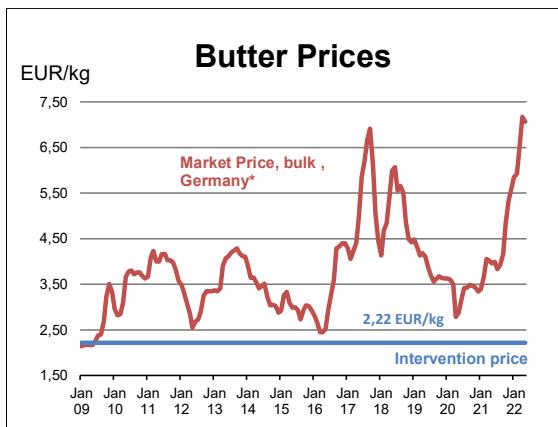
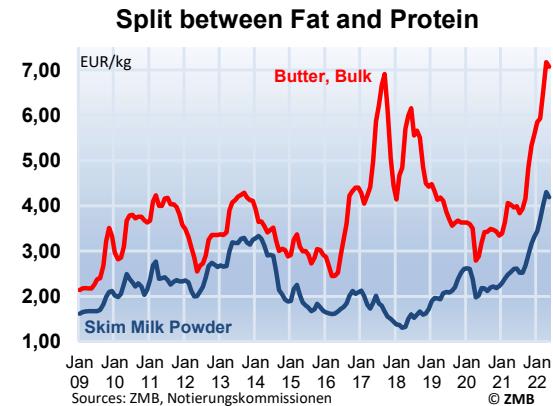
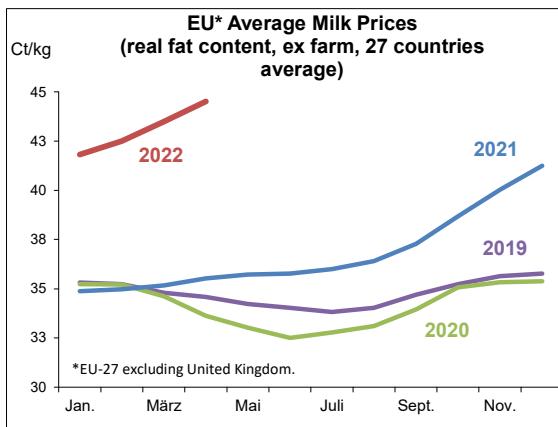
Table 29
EU: Exports of Lactose¹⁾

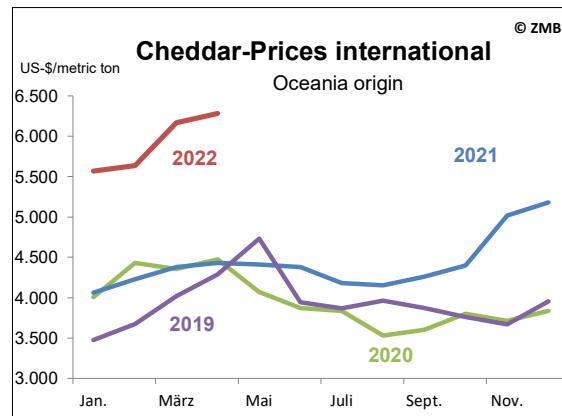
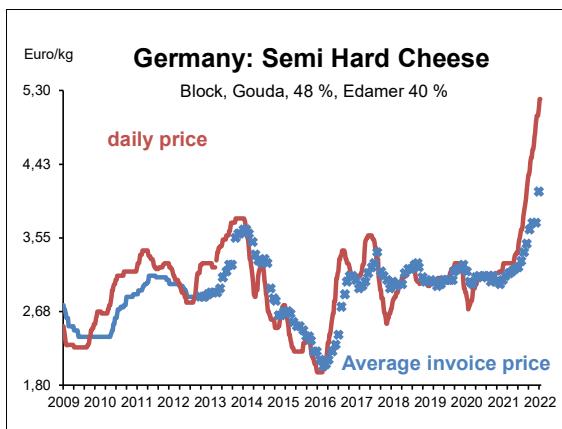
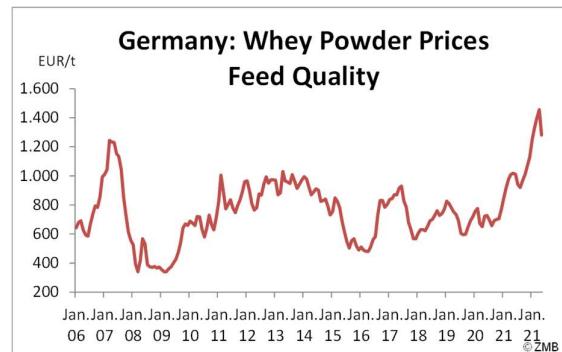
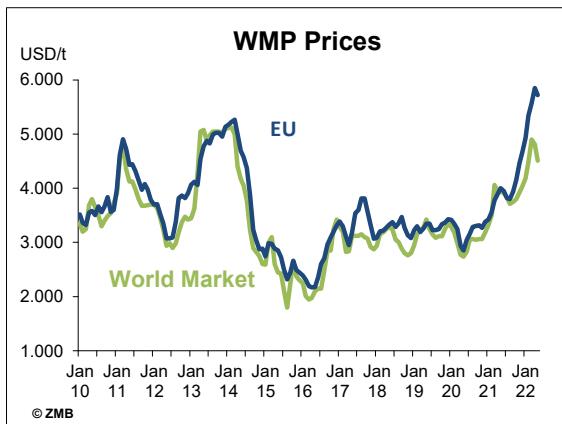
1.000 t	Months	2019	2020	2021	Months	2021	2022	Months	2021	2022
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ³⁾		EU-27 ³⁾	EU-27 ³⁾			
Germany	12	107,6	120,4	117,1	3	24,0	28,1	2	0,3	0,8
Ireland	12	0,7	2,7	0,4	3	0,0	0,2	2	0,0	0,0
France	12	23,3	31,7	25,5	3	5,4	5,1	2	0,2	0,4
Italy	12	13,5	18,1	19,8	3	6,1	4,6	2	.	.
Latvia	12	2,0	0,5	0,0	3	0,0	0,0	2	.	.
Lithuania	12	7,3	8,8	8,8	3	1,8	1,7	2	0,2	0,2
Austria	12	3,4	2,9	2,8	3	0,4	0,5	2	.	.
Netherlands	12	67,5	72,0	69,5	3	18,5	21,6	2	0,6	0,7
Other	12	16,2	31,7	21,6	3	7,5	5,1	2	0,0	0,0
EU	12	241,5	288,7	265,5	3	63,7	66,9	2	1,2	2,1

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

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Graphs







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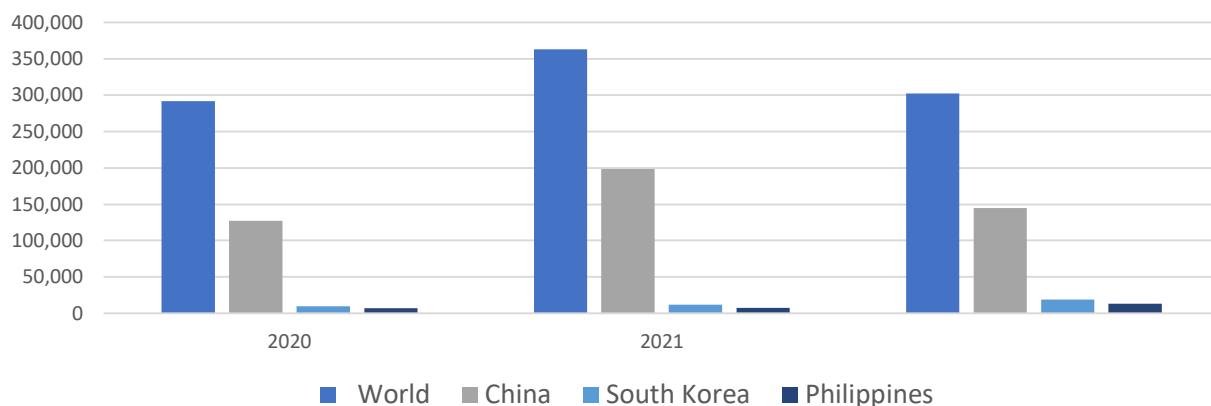
TRADE DATA MONITOR (TDM)

EU27 + UK Exports to World

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

Year to Date: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	292,070	363,044	302,196	100%	100%	100%	-17%
China	T	127,019	198,695	144,719	43%	55%	48%	-27%
South Korea	T	9,902	12,227	19,068	3%	3%	6%	56%
Philippines	T	7,047	7,625	13,434	2%	2%	4%	76%

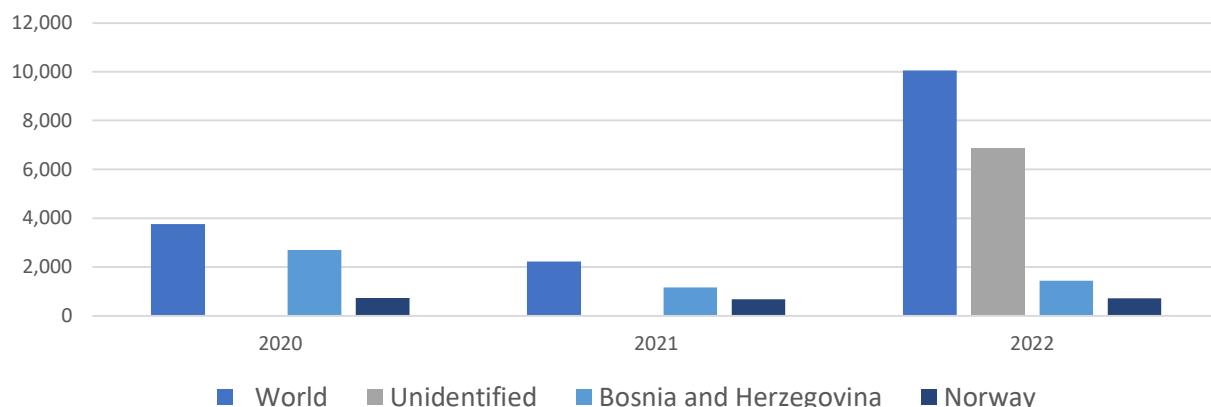


EU27 + UK Imports from World

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

Year to Date: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	3,757	2,234	10,056	100%	100%	100%	350%
Unidentified	T	0	0	6,850	0%	0%	68%	Calculation not possible
Bosnia and Herzegovina	T	2,697	1,165	1,446	72%	52%	14%	24%
Norway	T	724	682	710	19%	31%	7%	4%

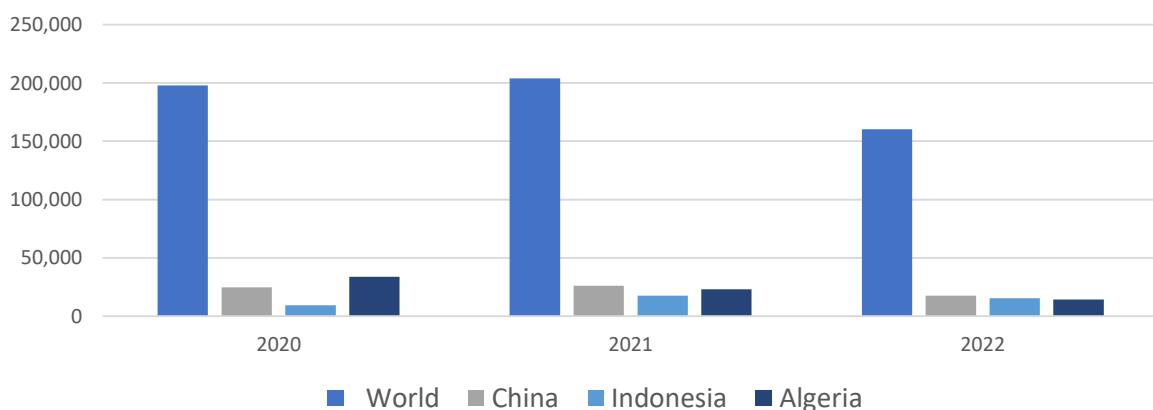


EU27 + UK Exports to World

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: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	198,180	204,010	160,483	100%	100%	100%	-21%
China	T	24,989	26,198	17,749	13%	13%	11%	-32%
Indonesia	T	9,442	17,641	15,501	5%	9%	10%	-12%
Algeria	T	34,028	23,049	14,219	17%	11%	9%	-38%

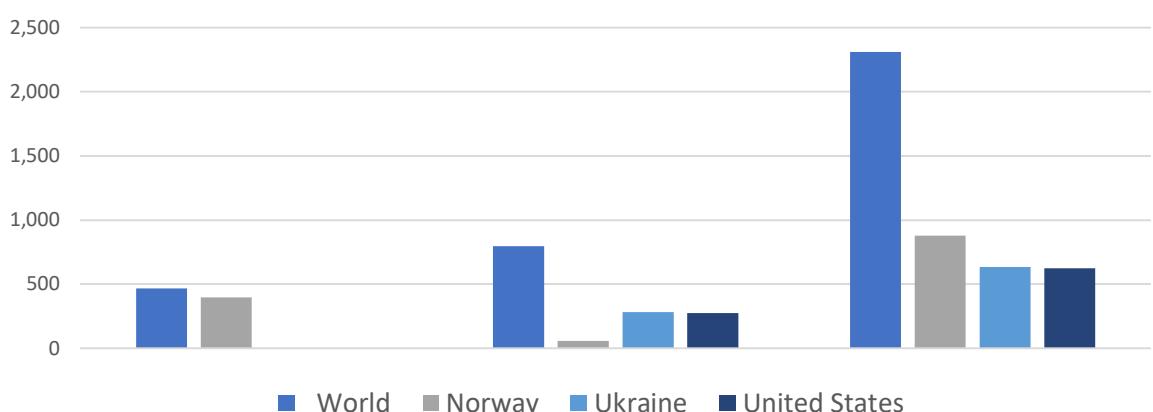


EU27 + UK Imports from World

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: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	466	796	2,310	100%	100%	100%	190%
Norway	T	397	58	877	85%	7%	38%	1412%
Ukraine	T	0	280	634	0%	35%	27%	126%
United States	T	0	273	622	0%	34%	27%	128%

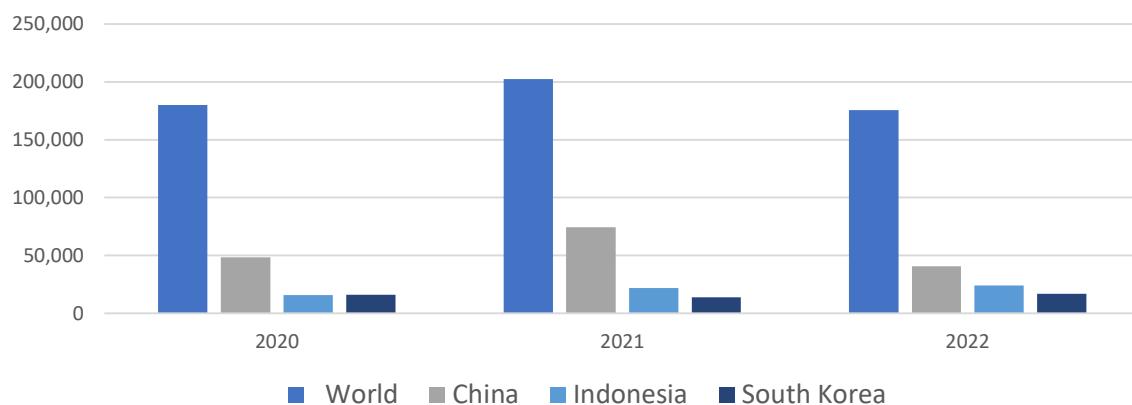


EU27 + UK Exports to World

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

Year to Date: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	180,111	202,690	175,514	100%	100%	100%	-13%
China	T	48,442	74,479	40,606	27%	37%	23%	-45%
Indonesia	T	15,723	21,878	24,170	9%	11%	14%	10%
South Korea	T	15,920	13,784	16,903	9%	7%	10%	23%

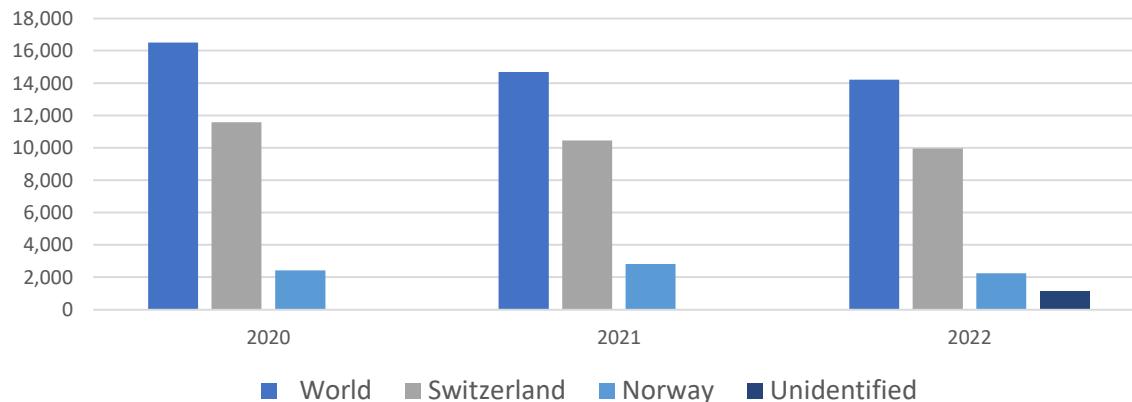


EU27 + UK Imports from World

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

Year to Date: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	16,506	14,689	14,206	100%	100%	100%	-3%
Switzerland	T	11,572	10,467	9,967	70%	71%	70%	-5%
Norway	T	2,434	2,835	2,255	15%	19%	16%	-20%
Unidentified	T	0	0	1,137	0%	0%	8%	Calculation not possible

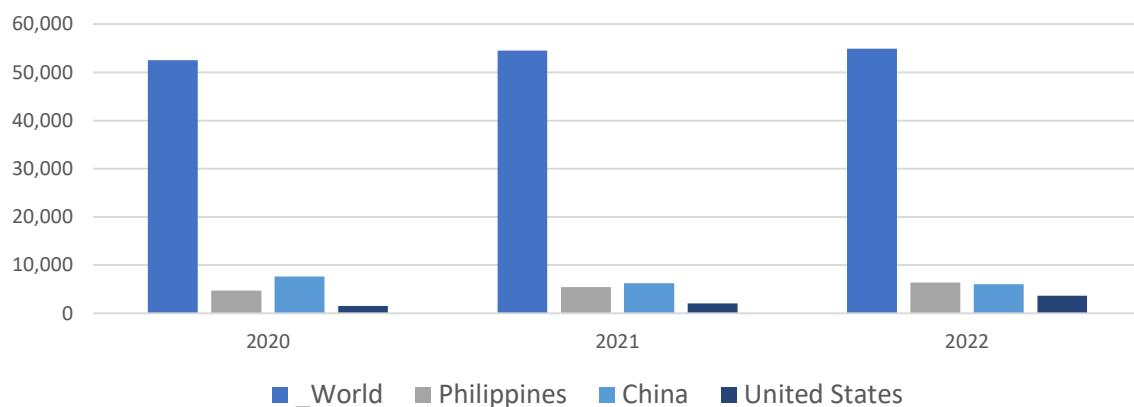


EU27 + UK Exports to World

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: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	52,524	54,568	54,914	100%	100%	100%	1%
Philippines	T	4,750	5,463	6,414	9%	10%	12%	17%
China	T	7,643	6,278	6,056	15%	12%	11%	-4%
United States	T	1,554	2,077	3,665	3%	4%	7%	76%

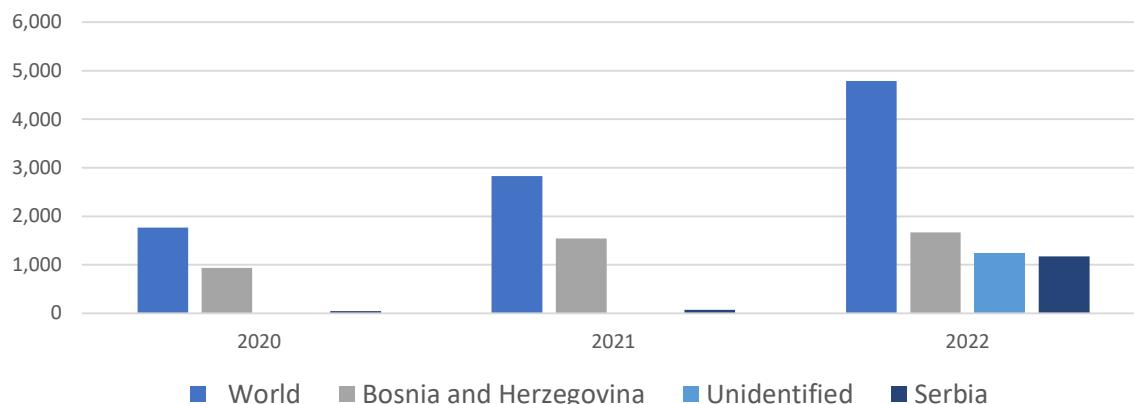


EU27 + UK Imports from World

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: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	1,762	2,824	4,786	100%	100%	100%	69%
Bosnia and Herzegovina	T	936	1,542	1,667	53%	55%	35%	8%
Unidentified	T	0	0	1,233	0%	0%	26%	Calculation not possible
Serbia	T	50	71	1,174	3%	3%	25%	1554%

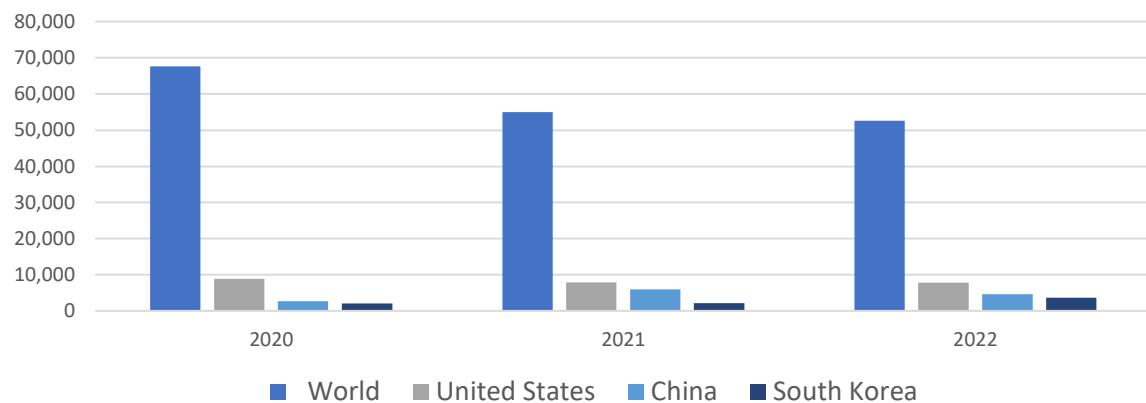


EU27 + UK Exports to World

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

Year to Date: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	67,640	54,967	52,658	100%	100%	100%	-4%
United States	T	8,897	7,926	7,845	13%	14%	15%	-1%
China	T	2,680	5,931	4,629	4%	11%	9%	-22%
South Korea	T	2,013	2,085	3,673	3%	4%	7%	76%

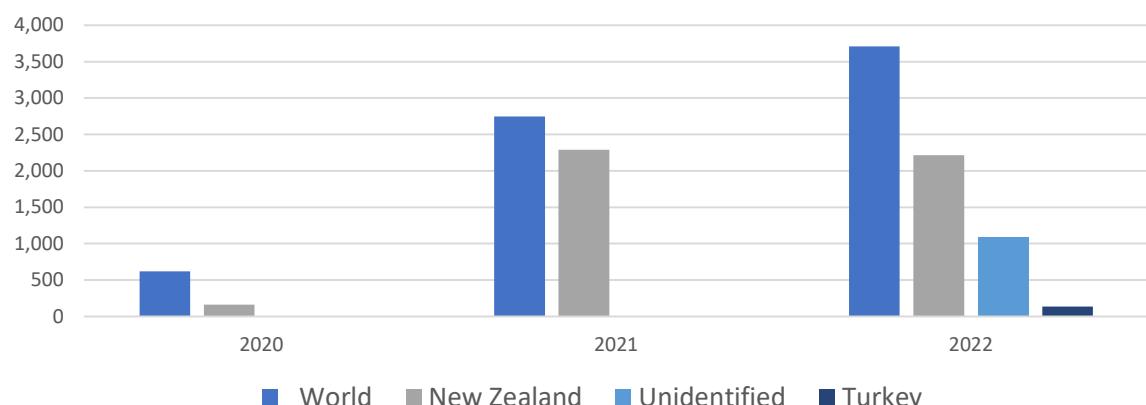


EU27 + UK Imports from World

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

Year to Date: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	621	2,746	3,707	100%	100%	100%	35%
New Zealand	T	158	2,289	2,216	25%	83%	60%	-3%
Unidentified	T	0	0	1,087	0%	0%	29%	Calculation not possible
Turkey	T	0	4	137	0%	0%	4%	3325%

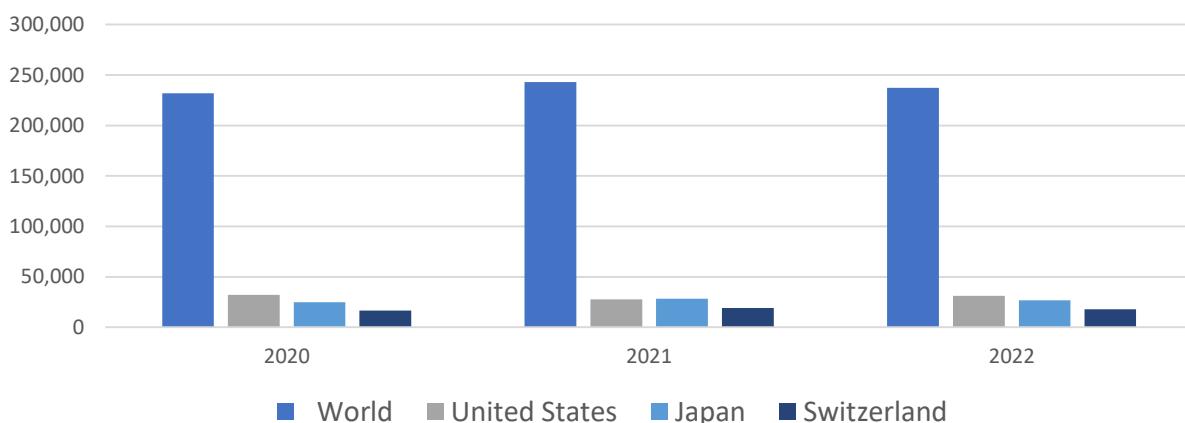


EU27 + UK Exports to World

Commodity: 0406, Cheese and Curd (in tonnes)

Year to Date: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	231,818	243,061	237,331	100%	100%	100%	-2%
United States	T	32,136	27,695	31,226	14%	11%	13%	13%
Japan	T	24,905	28,276	26,553	11%	12%	11%	-6%
Switzerland	T	16,281	19,127	17,560	7%	8%	7%	-8%

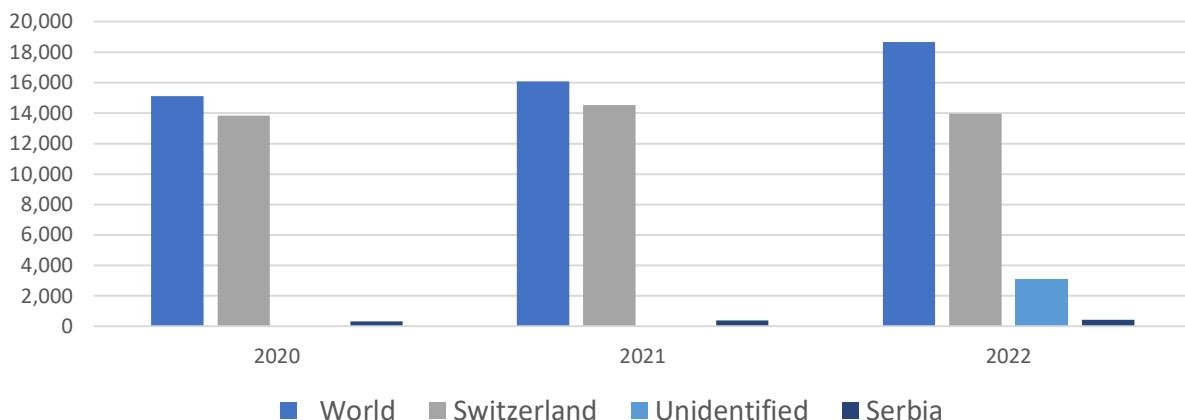


EU27 + UK Imports from World

Commodity: 0406, Cheese and Curd (in tonnes)

Year to Date: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	15,098	16,079	18,656	100%	100%	100%	16%
Switzerland	T	13,824	14,526	13,942	92%	90%	75%	-4%
Unidentified	T	0	0	3,107	0%	0%	17%	Calculation not possible
Serbia	T	312	382	435	2%	2%	2%	14%

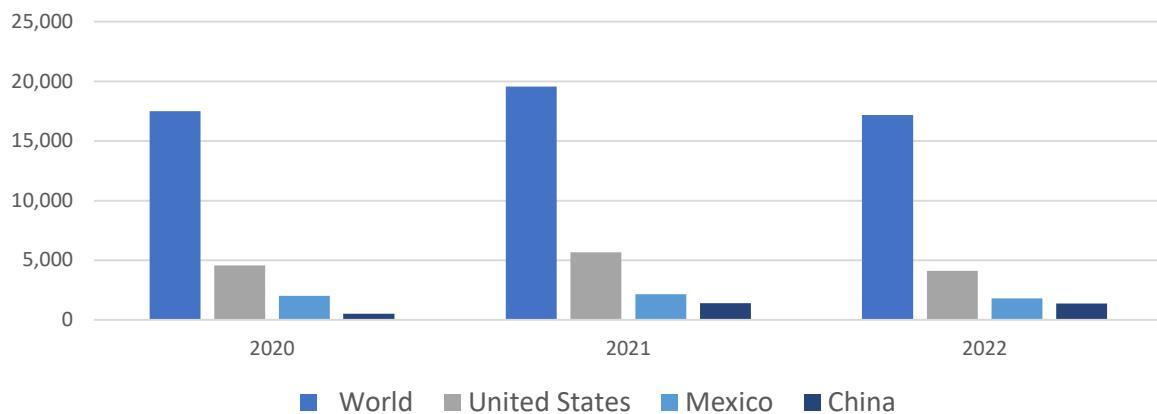


EU27 + UK Exports to World

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

Year to Date: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	17,504	19,555	17,177	100%	100%	100%	-12%
United States	T	4,539	5,650	4,090	26%	29%	24%	-28%
Mexico	T	2,010	2,113	1,787	11%	11%	10%	-15%
China	T	504	1,381	1,342	3%	7%	8%	-3%

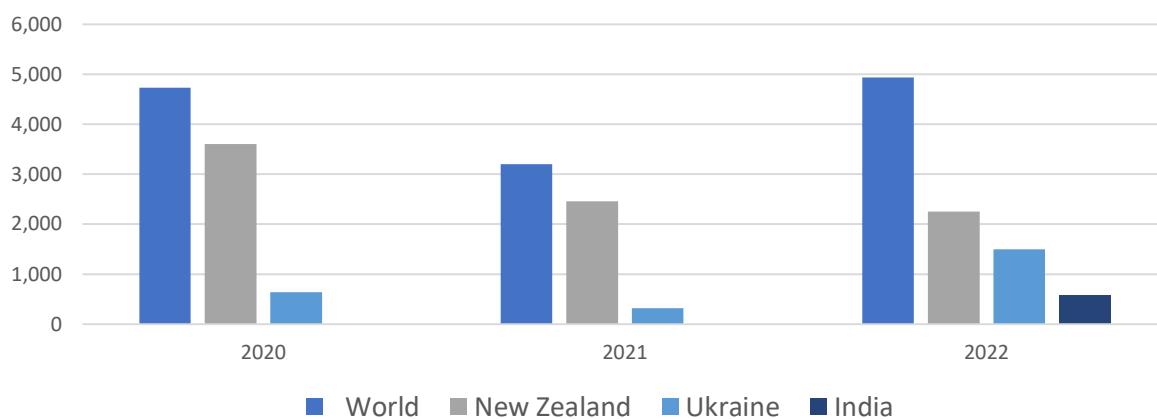


EU27 + UK Imports from World

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

Year to Date: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	4,735	3,198	4,932	100%	100%	100%	54%
New Zealand	T	3,600	2,455	2,250	76%	77%	46%	-8%
Ukraine	T	636	319	1,490	13%	10%	30%	367%
India	T	0	0	574	0%	0%	12%	Calculation not possible

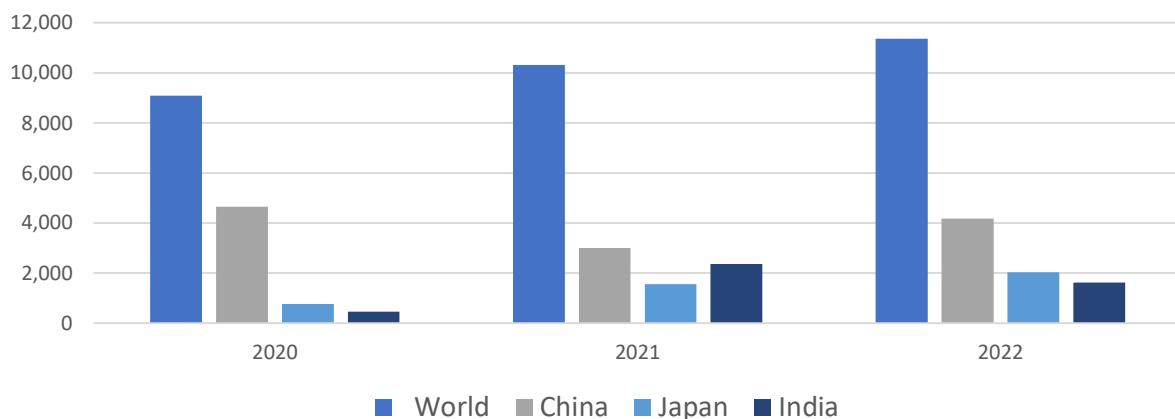


EU27 + UK Exports to World

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

Year to Date: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	9,092	10,308	11,375	100%	100%	100%	10%
China	T	4,647	2,998	4,182	51%	29%	37%	39%
Japan	T	763	1,566	2,030	8%	15%	18%	30%
India	T	453	2,365	1,617	5%	23%	14%	-32%

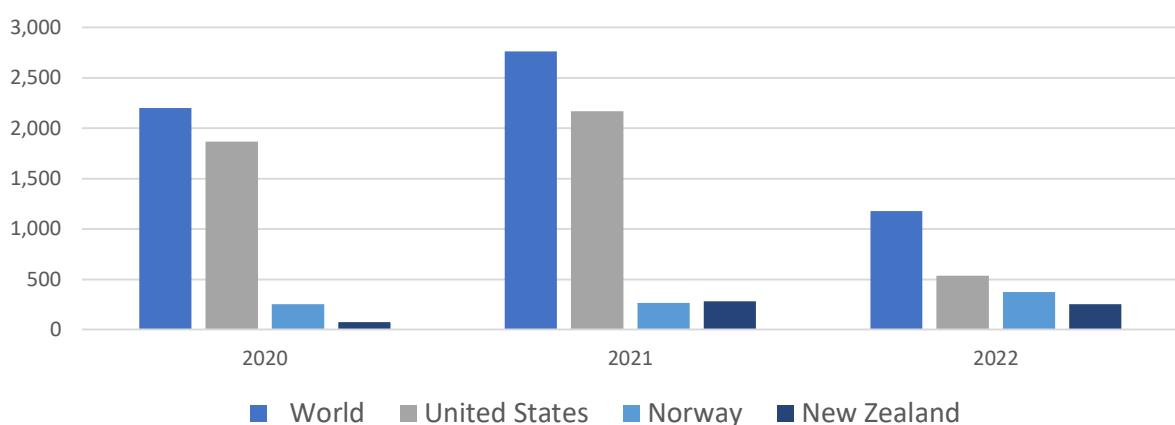


EU27 + UK Imports from World

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

Year to Date: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	2,201	2,763	1,177	100%	100%	100%	-57%
United States	T	1,865	2,169	535	85%	79%	45%	-75%
Norway	T	253	267	373	11%	10%	32%	40%
New Zealand	T	76	280	254	3%	10%	22%	-9%

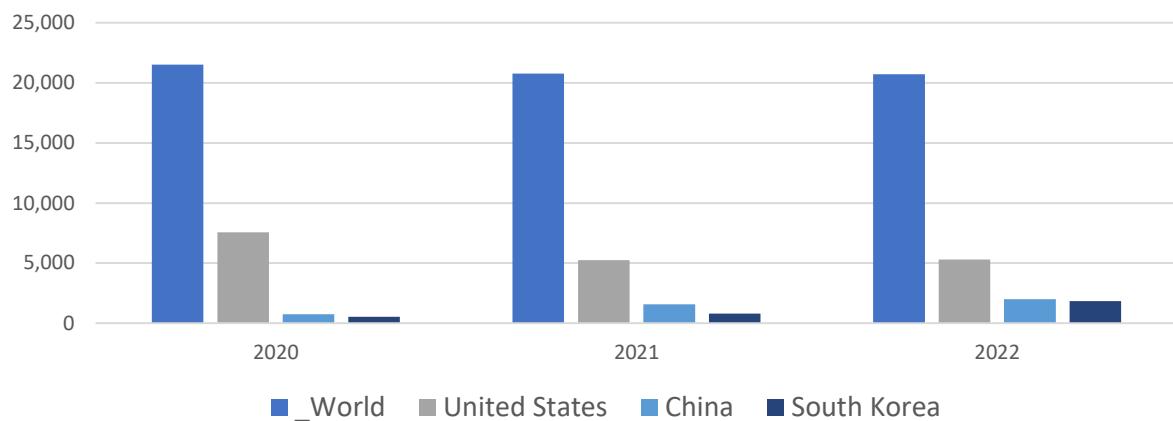


EU27 + UK Exports to World

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

Year to Date: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	21,508	20,794	20,731	100%	100%	100%	0%
United States	T	7,558	5,241	5,300	35%	25%	26%	1%
China	T	739	1,575	1,990	3%	8%	10%	26%
South Korea	T	528	803	1,833	2%	4%	9%	128%

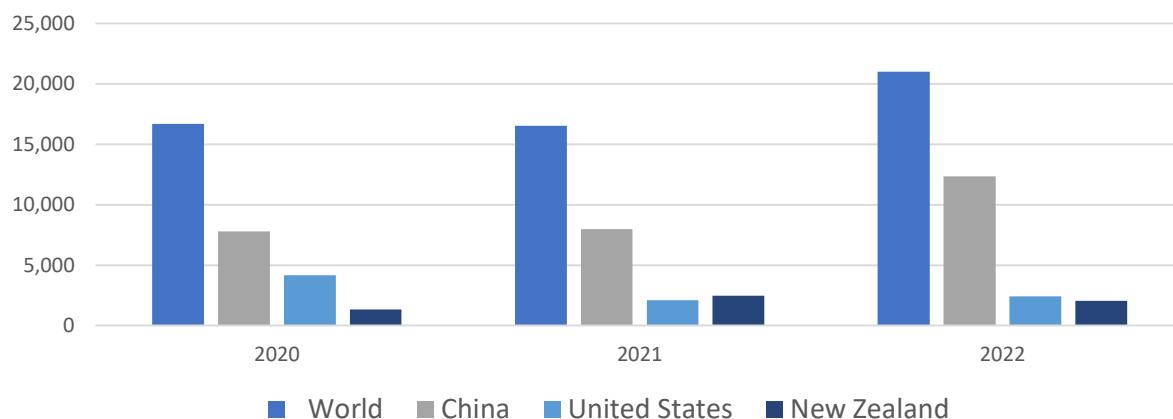


EU27 + UK Imports from World

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

Year to Date: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	16,692	16,527	21,000	100%	100%	100%	27%
China	T	7,799	7,997	12,349	47%	48%	59%	54%
United States	T	4,168	2,120	2,410	25%	13%	11%	14%
New Zealand	T	1,332	2,458	2,033	8%	15%	10%	-17%

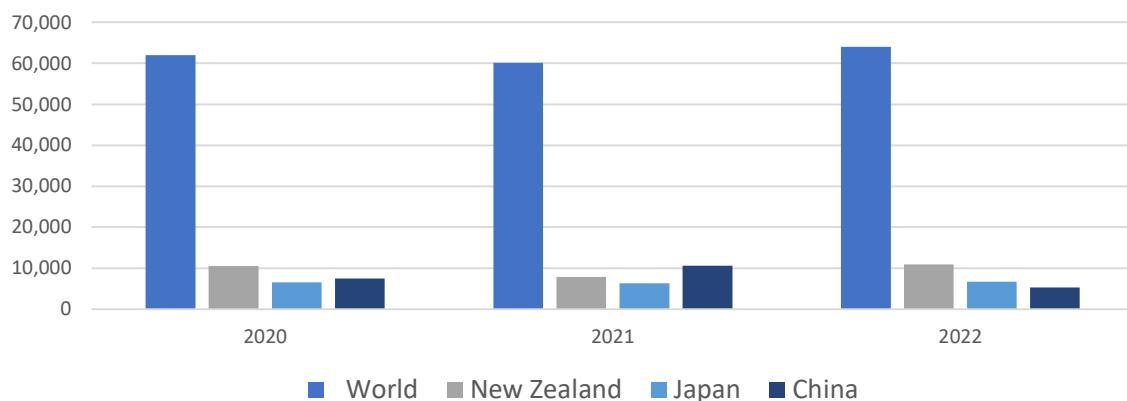


EU27 + UK Exports to World

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: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	61,965	60,155	64,054	100%	100%	100%	6%
New Zealand	T	10,573	7,899	10,921	17%	13%	17%	38%
Japan	T	6,534	6,309	6,768	11%	10%	11%	7%
China	T	7,531	10,607	5,298	12%	18%	8%	-50%

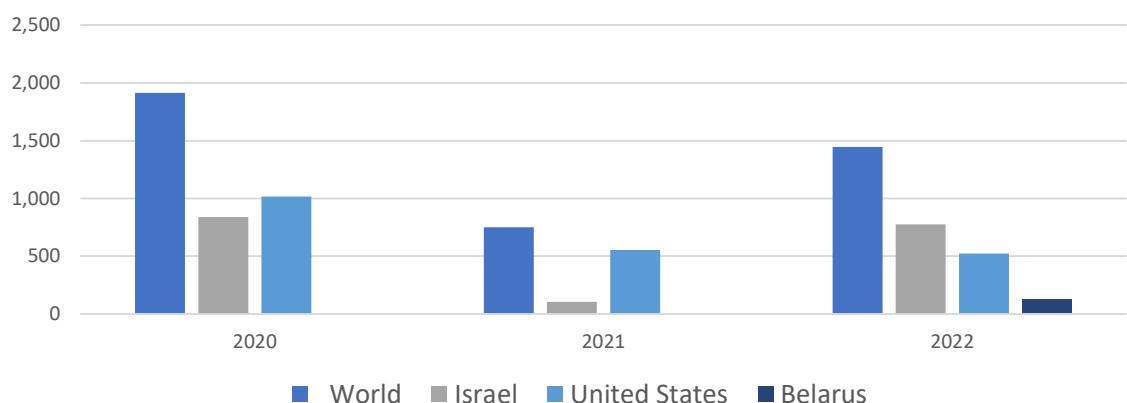


EU27 + UK Imports from World

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: March, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	1,914	752	1,444	100%	100%	100%	92%
Israel	T	840	106	776	44%	14%	54%	632%
United States	T	1,016	554	523	53%	74%	36%	-6%
Belarus	T	0	0	120	0%	0%	8%	Calculation not possible





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CWT EXPORT SUBSIDIES

CWT exports subsidies - Last update: 8 June 2022

YEAR	(TONNES)	American type cheeses	Butter	Butteroil (AMF)	WMP	Cream cheese	Exported to
2022	May	20,775	43		12,927	1,996	18 countries in 6 regions
	April	19,414	21		7,076	1,950	18 countries in 6 regions
	March	16,556	17		6,668	1,814	17 countries in 5 regions
	February	13,562			6,396	1,406	16 countries in 5 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!



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IMPORTANT UPCOMING EVENTS



Important upcoming events 2022

Date	Event	Jurisdiction
2021-2022	EU Conference on the future of Europe	EU
2022 Jul-Dec	Czech Presidency	EU
2022 Sep	International Whey Conference, Chicago, US	Global
2022 Sep	IDF World Dairy Summit – New Delhi - DATE: September 12 – 15, 2022	Global
2022 Nov	EDA Annual Congress, Madrid, Spain	EU