

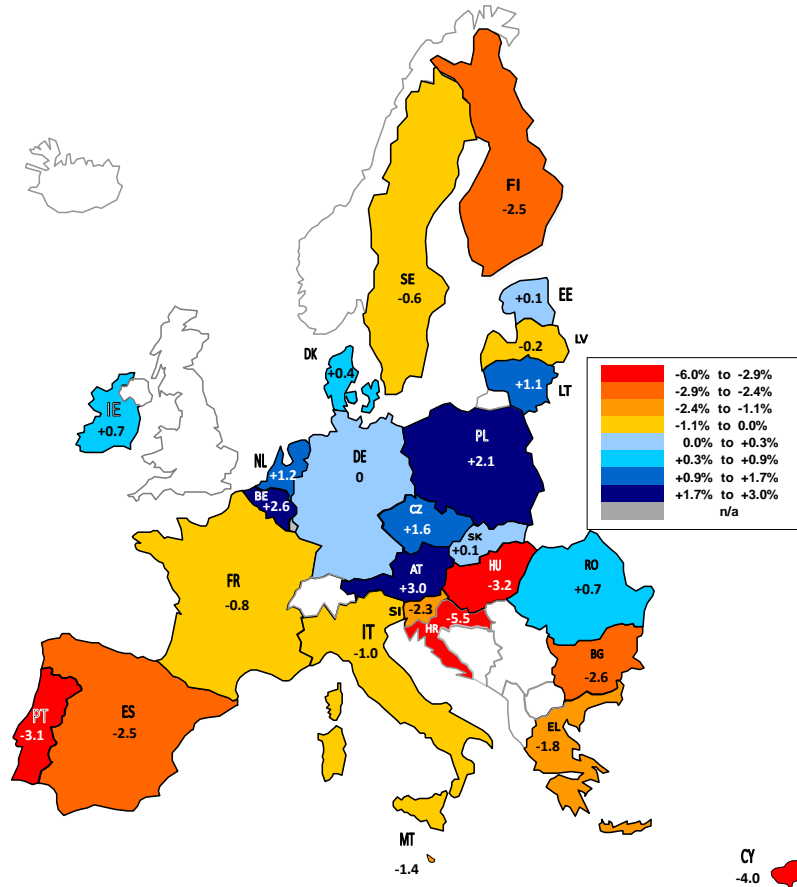


Milk Market Situation

Meeting of TEC EDA
Brussels, 8 March 2023

EU Milk Deliveries compared to last period (in %)

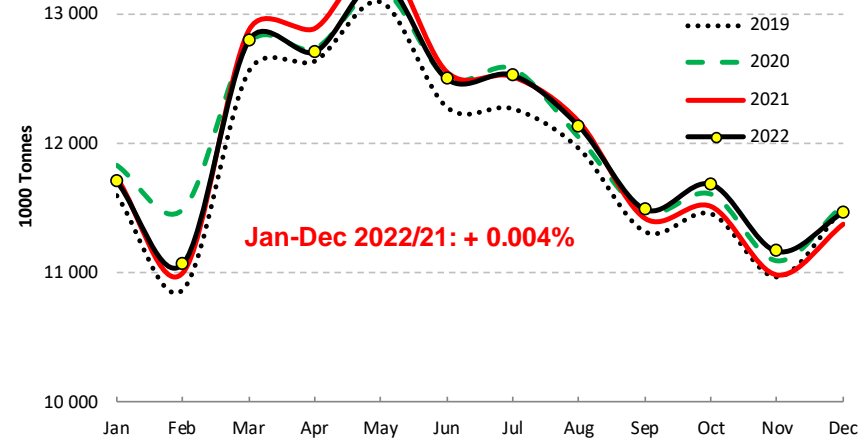
(Jan - Dec 2022 / Jan - Dec 2021)



Source : MS' Communications to Eurostat, FEGA, AGEA, Reg.479/2010.1(a)1

The designations employed and the presentation of material on the map do not imply the expression of any opinion whatsoever on the part of the European Union concerning the legal status of any country, territory or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

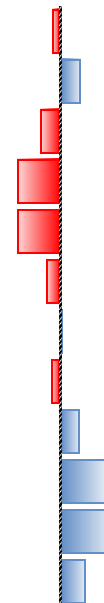
EU - Cows' milk collected



Source: Estat (Newcronos) - MS notifications - CLAL(IT)

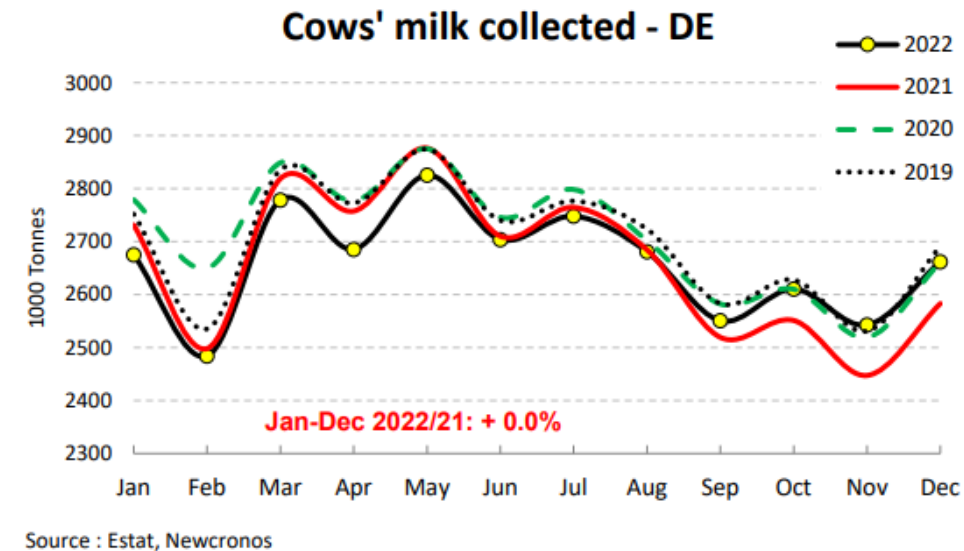
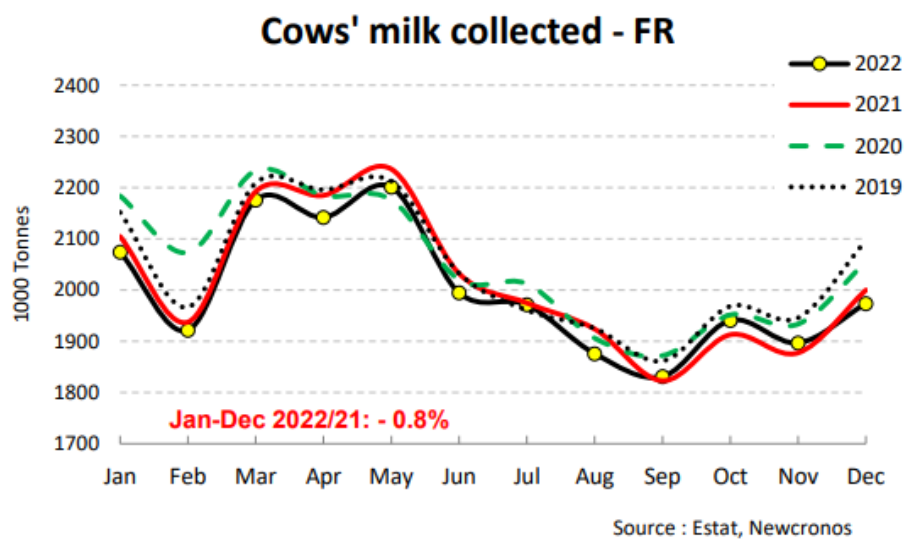
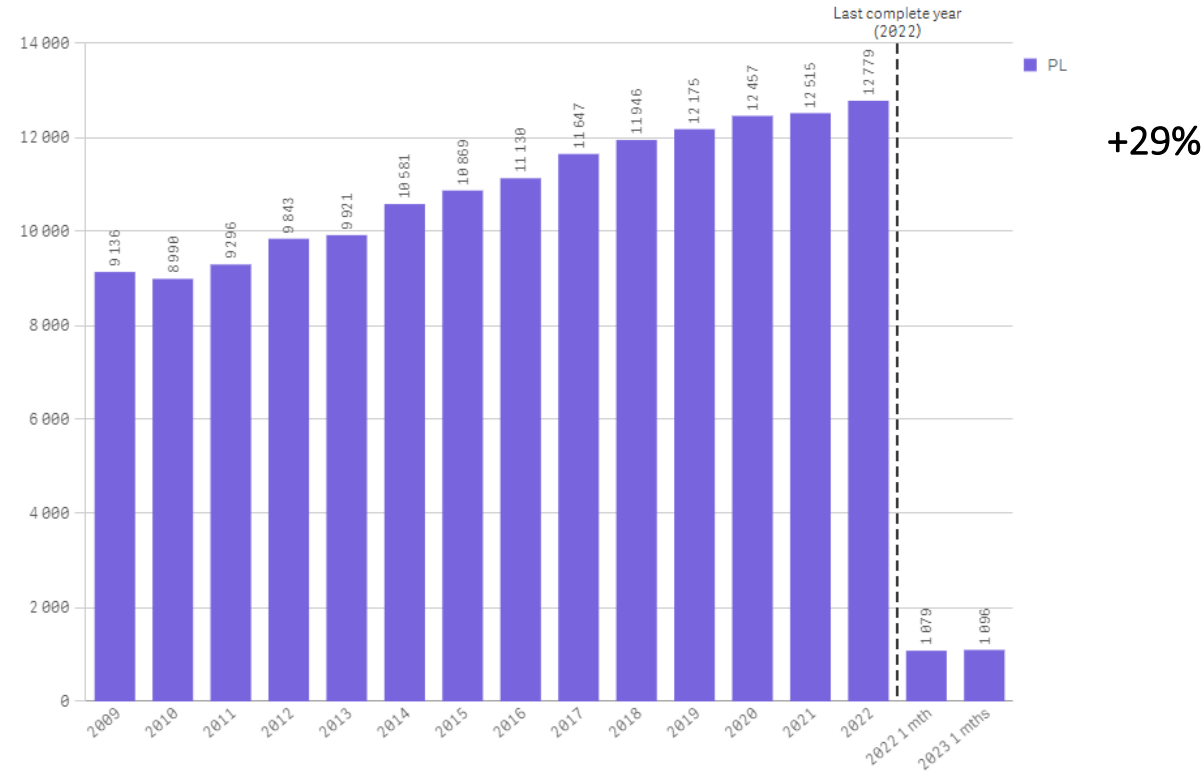
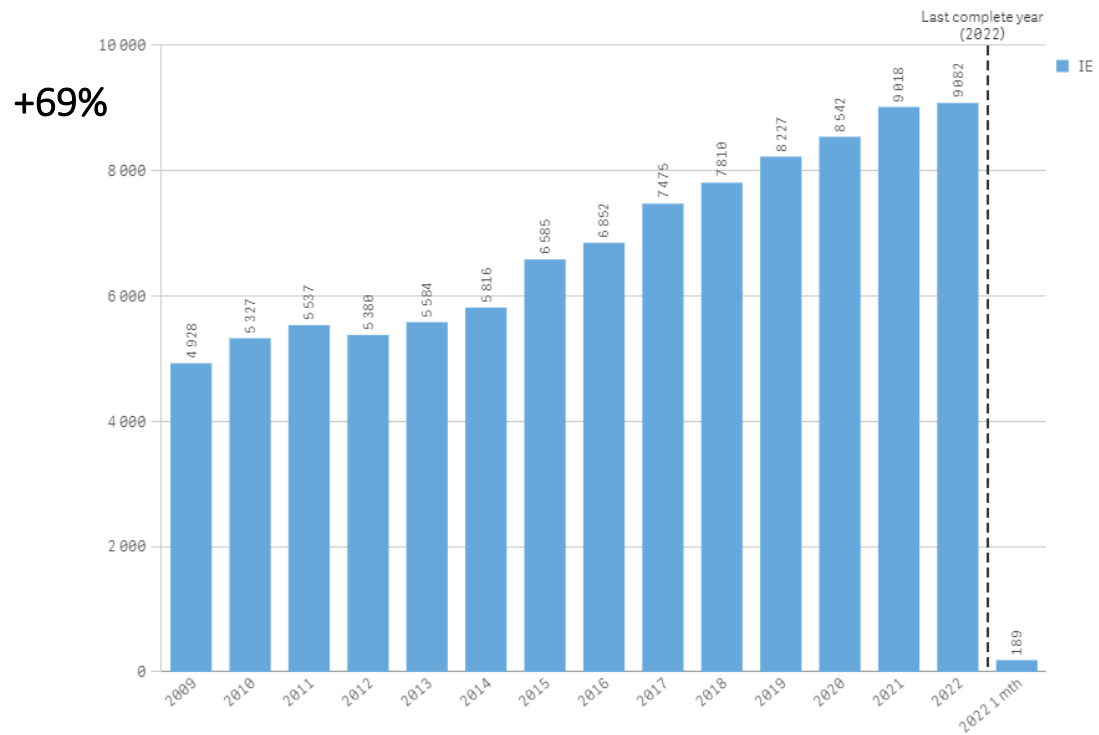
EU milk deliveries in 2022

Jan	- 0.3%
Feb	+ 0.6%
Mar	- 0.7%
Apr	- 1.5%
May	- 1.4%
Jun	- 0.5%
Jul	+ 0.1%
Aug	- 0.3%
Sep	+ 0.6%
Oct	+ 1.5%
Nov	+ 1.7%
Dec	+ 0.8%



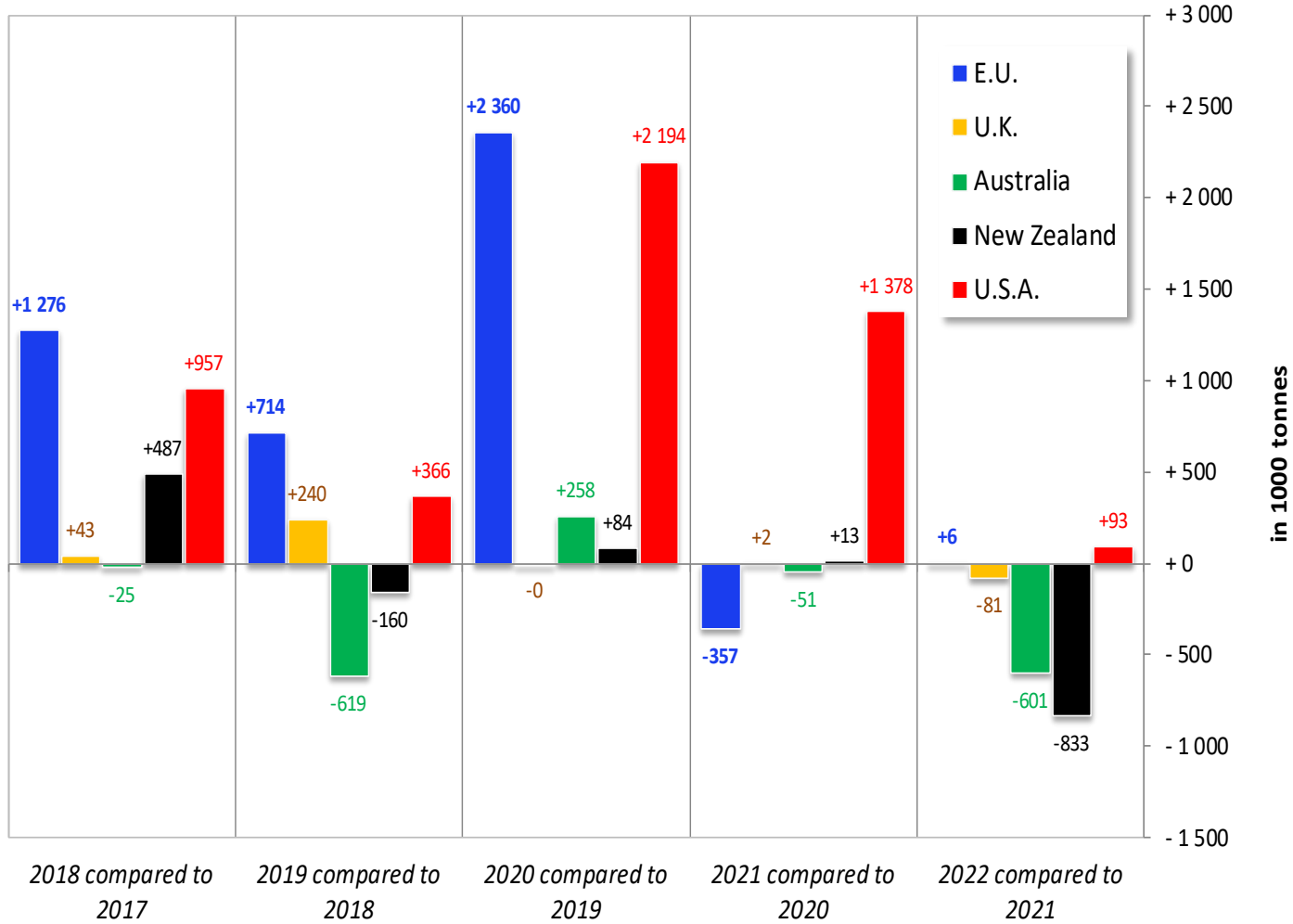
Jan-Dec 2022 compared to Jan-Dec 2021

Rank	evolution in 1000 Tons	
	MS	Tons
1.	PL	+ 263
2.	NL	+ 158
3.	BE	+ 115
4.	AT	+ 93
5.	IE	+ 63
6.	CZ	+ 51
7.	DK	+ 20
8.	LT	+ 14
9.	RO	+ 8
10.	DE	+ 5
11.	SK	+ 1
12.	EE	+ 1
13.	MT	- 1
14.	LV	- 2
15.	CY	- 12
16.	EL	- 12
17.	SI	- 14
18.	SE	- 17
19.	BG	- 17
20.	HR	- 24
21.	HU	- 56
22.	FI	- 56
23.	PT	- 58
24.	IT	- 132
25.	ES	- 186
26.	FR	- 200
	EU	+ 6



Evolution of Raw Milk Production

(E.U., U.K., New Zealand, Australia, U.S.A.)



Combined world milk production



- Dec 2022 **24.7** mio t **+0.5%**
 - Jan-Dec 2022 **292.1** mio t **-0.5%**

- Variations

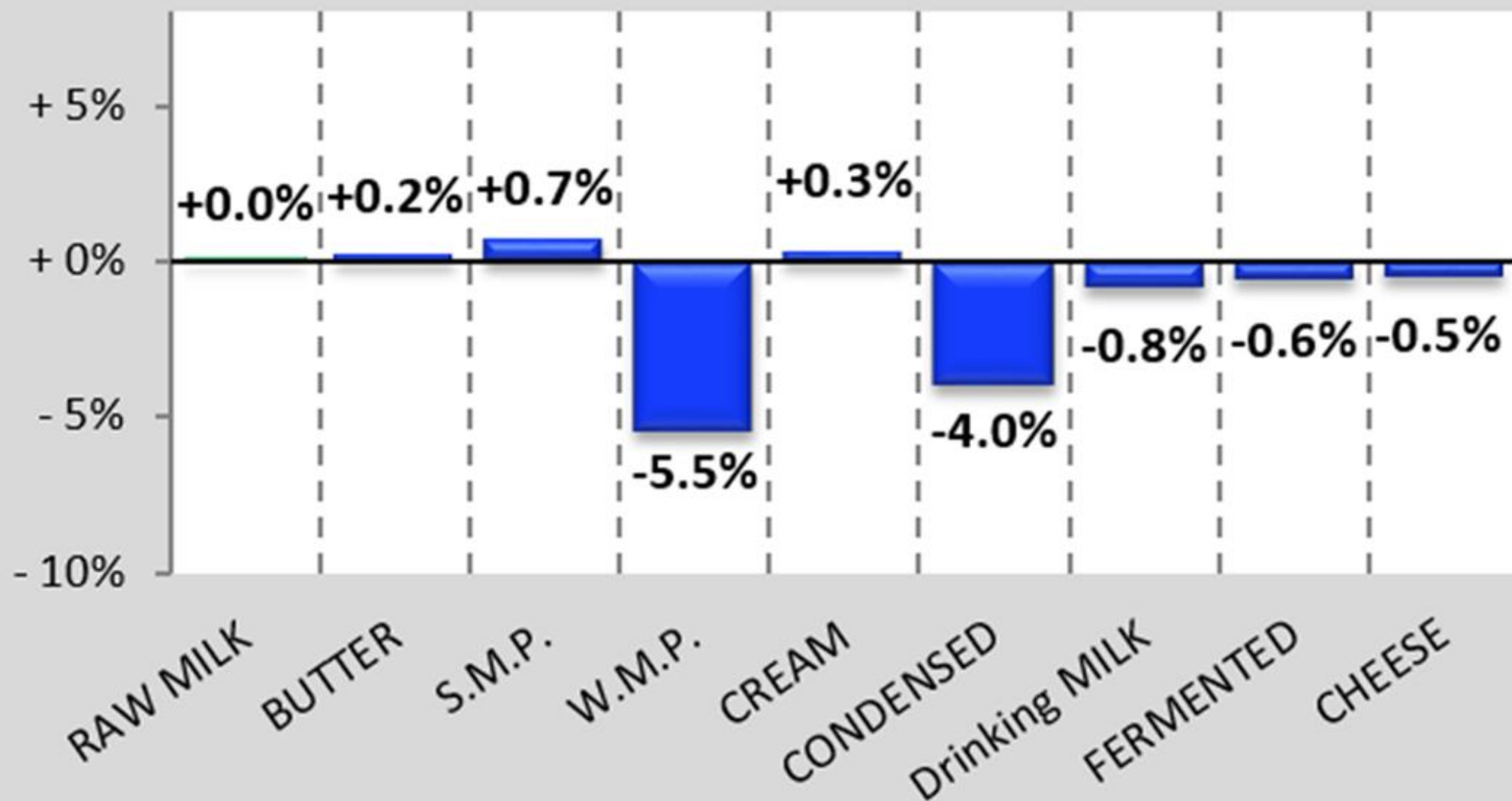
Dec 2022

AUS	↓	- 6.0%
NZ	↓	- 0.6%
USA	↔	+ 0.8%
UK	↔	+ 1.7%
EU	↔	+ 0.8%

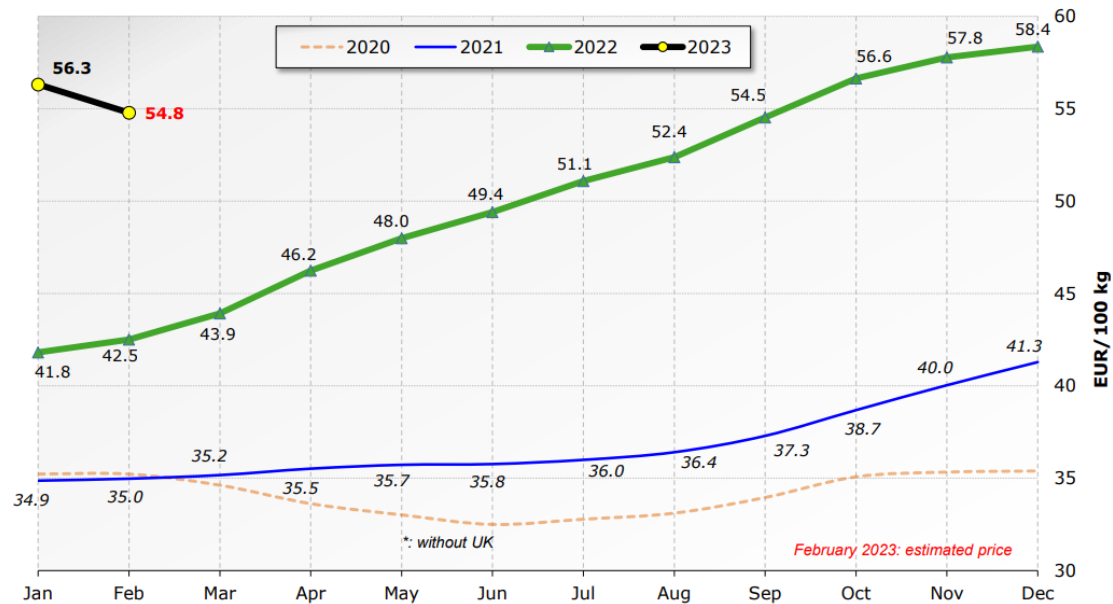
In 2022

Dec 2022	AUS	↓	- 6.7%	(Jan-Dec 2022)
Dec 2022	NZ	↓	- 3.8%	(Jan-Dec 2022)
Dec 2022	USA	↔	+ 0.2%	(Jan-Dec 2022)
Dec 2022	UK	↔	- 0.5%	(Jan-Dec 2022)
Dec 2022	EU	↔	+ 0.004%	(Jan-Dec 2022)

EU Productions Jan-Dec 2022 compared to Jan-Dec 2021)



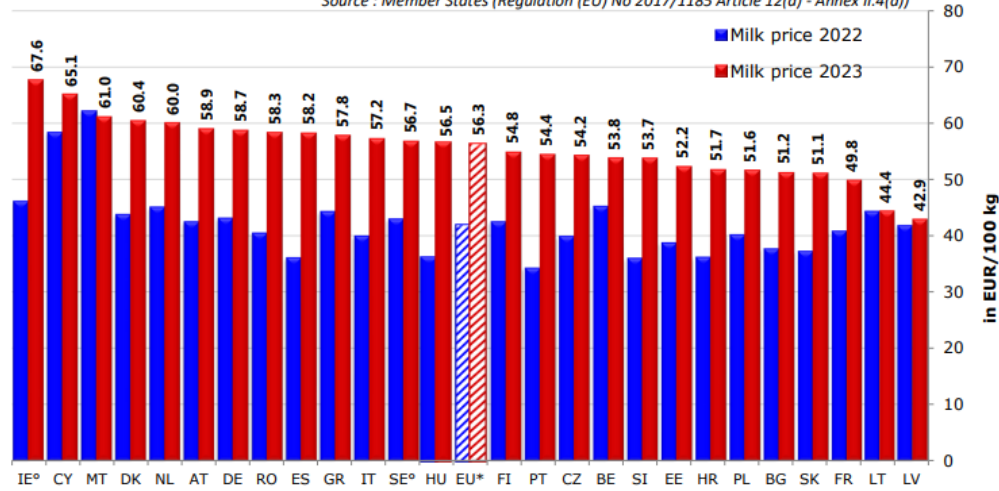
Milk Prices paid to the Producers EU* (weight. avg.)



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

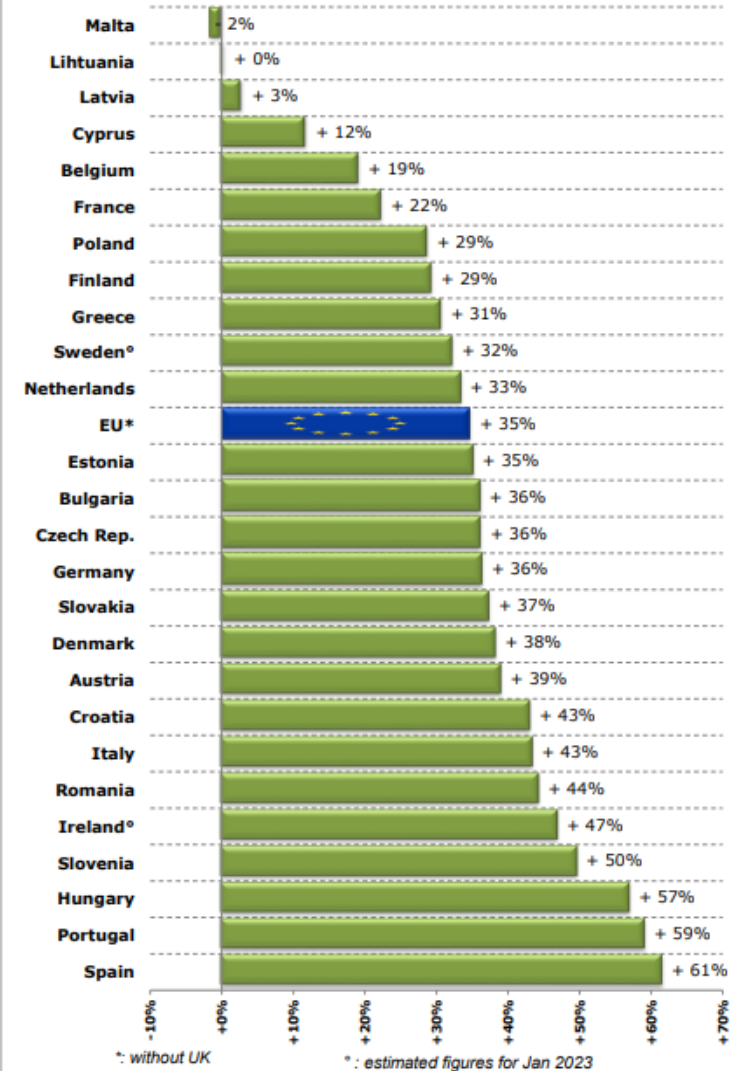
EU MILK PRICES (Jan 2023 vs Jan 2022)

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



21 MS

Raw Milk Price evolution in January 2023 compared to January 2022

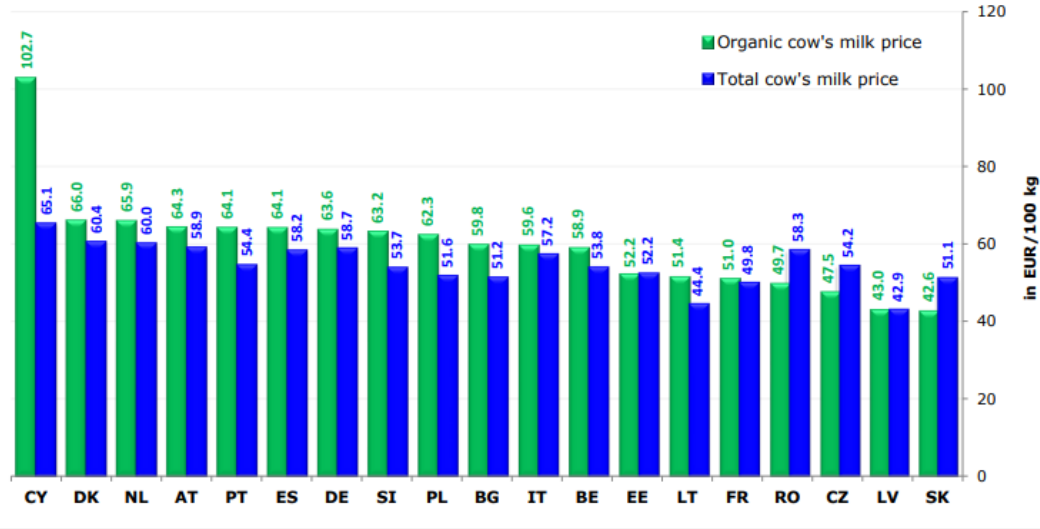


Source : Member States (Reg. (EU) No 2017/1185 Article 12(a) - Annex II.4(a))

EU organic raw milk production & prices

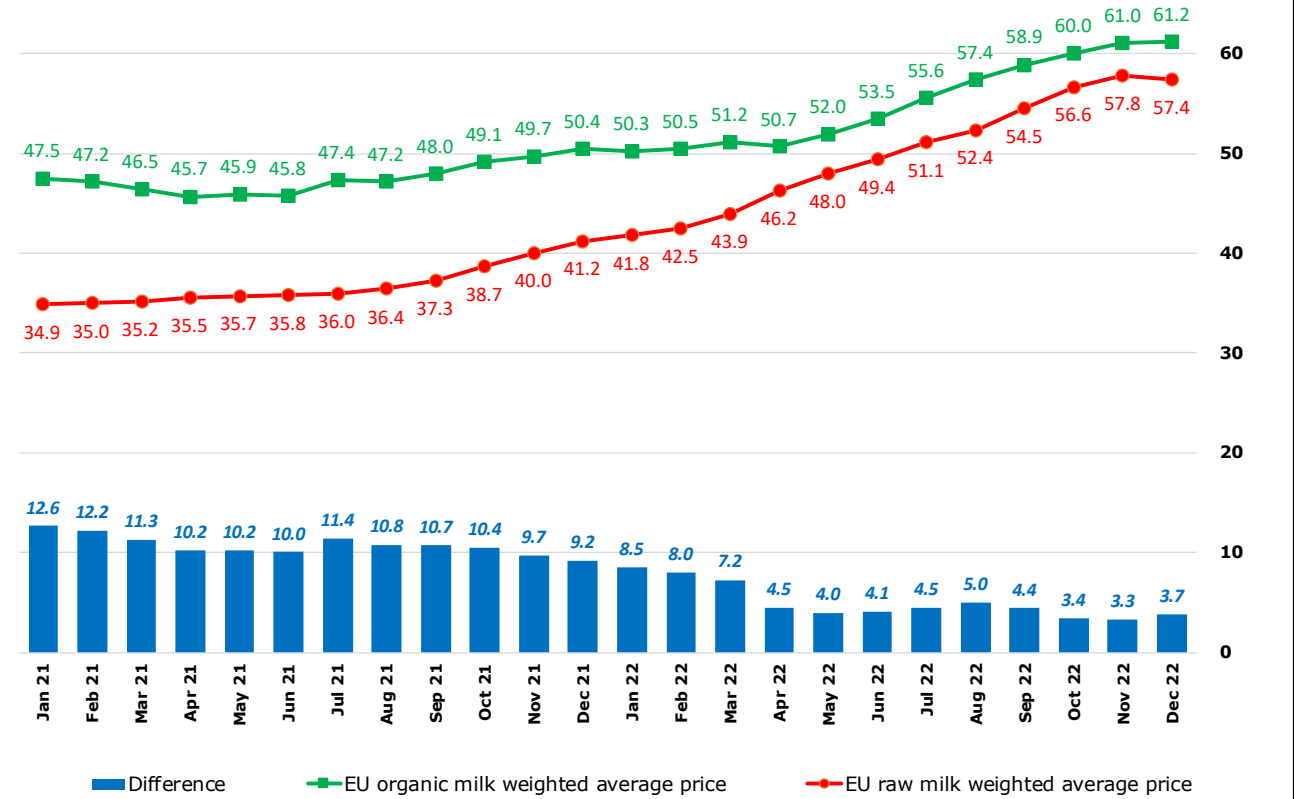
EU Organic cow's milk prices January 2023

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



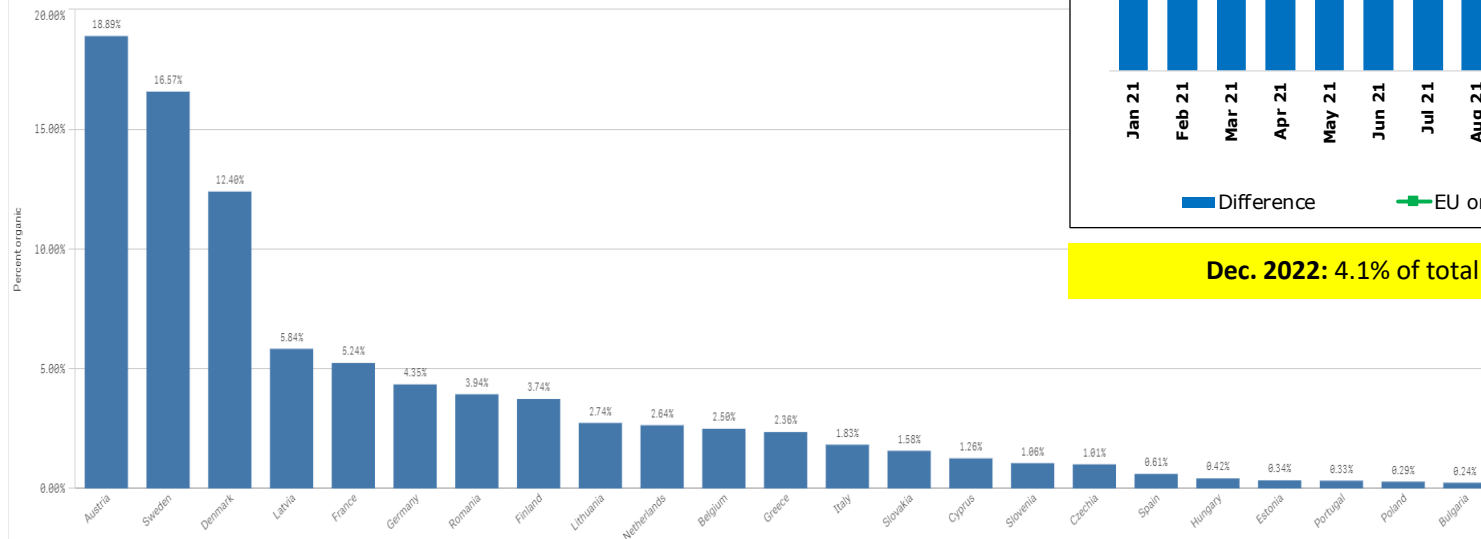
EU raw milk and organic milk prices

Source : MS' communications under Reg. (EU) No 2017/1185 Article 12(a) - Annex II.4(a)



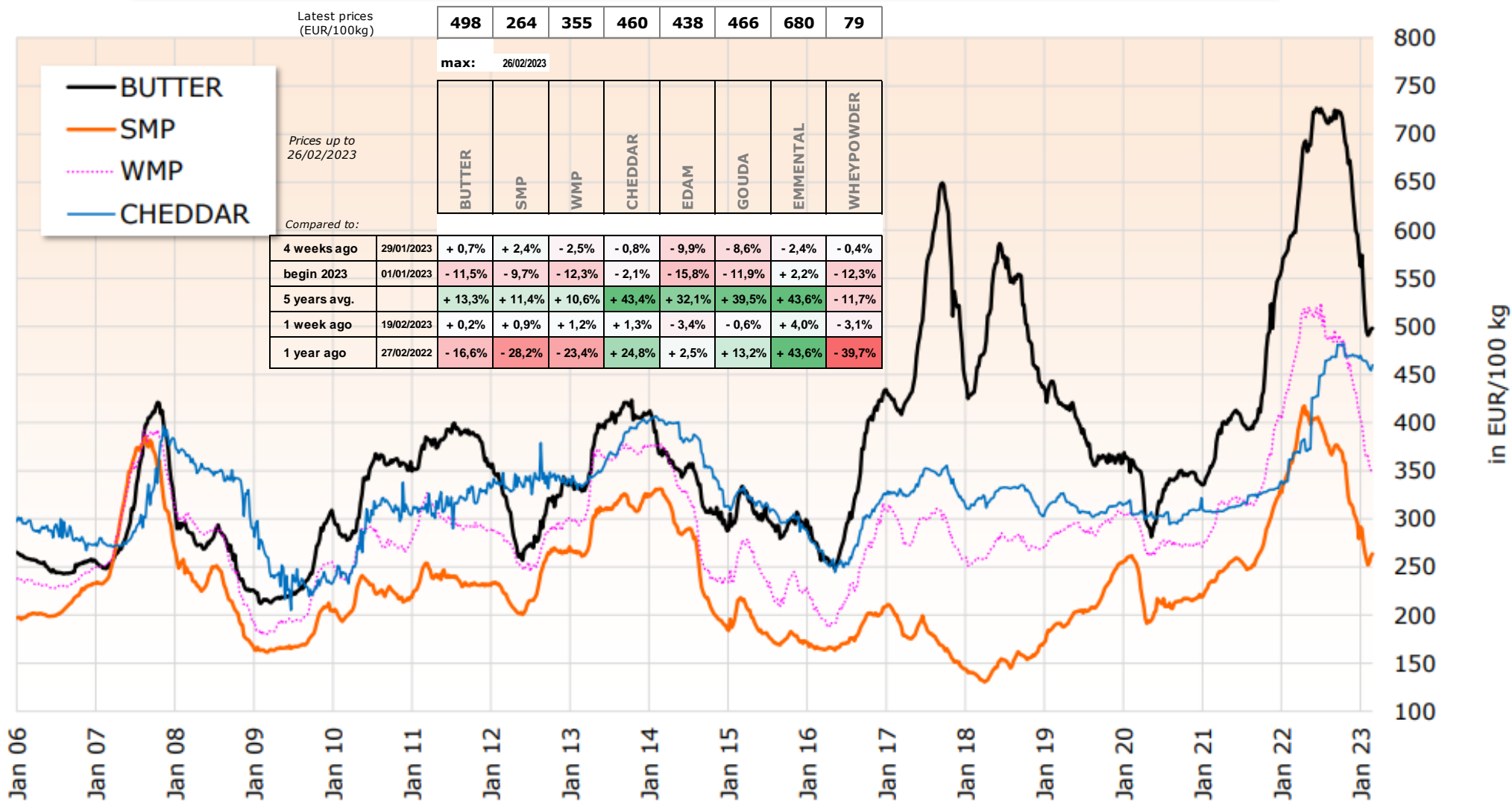
Dec. 2022: 4.1% of total raw milk collected was organic (based on notifications from 23 MS)

For years: 2022 > Months: 12 > All Member States



EU evolutive* dairy Quotations

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



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

* EU evolutive: EU-15 (before 2004), EU-25 (2004 to 2006), EU-27 (2007 to 2013), EU-28 (2013 to 01/2020), EU-27 without UK (from 02/2020 onwards)

EU Exports of Dairy products - Main destinations

Source : COMEXT

Period : January-December

Quantity in Tonnes

EU EXPORTS of BUTTER - main destinations				
Period : January-December				
Qty Tons	2020	2021	2022	
USA	37 676	41 811	40 370	- 3%
China	14 635	16 315	11 371	- 30%
South Korea	7 700	10 675	10 653	- 0%
Saudi Arabia	17 728	9 436	9 016	- 4%
Switzerland	5 743	3 558	7 873	+ 121%
U.A.Emirates	6 210	4 843	5 659	+ 17%
Indonesia	3 191	3 651	5 343	+ 46%
Taiwan	5 117	5 342	5 059	- 5%
Singapore	6 410	6 129	4 945	- 19%
Morocco	10 168	9 016	3 392	- 62%
Australia	3 523	3 117	3 047	- 2%
Other	83 472	67 081	54 743	- 18%
Total (without UK)	201 573	180 974	161 472	 - 11%
United Kingdom°	49 377	38 973	54 342	+ 39%

* Trade with U.K. only available up to November 2022

EU EXPORTS of CHEESES - main destinations				
Period : January-December				
Qty Tons	2020	2021	2022	
USA	117 749	132 951	129 096	- 3%
Japan	128 049	118 334	119 814	+ 1%
Switzerland	69 216	72 632	70 901	- 2%
South Korea	53 014	49 074	59 351	+ 21%
Saudi Arabia	42 405	42 719	44 583	+ 4%
Ukraine	46 670	53 212	33 193	- 38%
China	26 801	38 418	29 374	- 24%
Canada	24 411	26 033	26 420	+ 1%
Australia	27 163	27 470	26 084	- 5%
Libya	15 831	20 582	22 438	+ 9%
Morocco	21 046	22 466	21 264	- 5%
Other	336 128	356 026	340 945	- 4%
Total (without UK)	908 484	959 919	923 462	 - 4%
United Kingdom°	446 846	391 913	389 339	- 1%

* Trade with U.K. only available up to November 2022

EU EXPORTS of SMP - main destinations				
Period : January-December				
Qty Tons	2020	2021	2022	
Algeria	118 551	89 047	112 442	+ 26%
China	121 462	125 141	83 681	- 33%
Indonesia	45 044	64 505	42 926	- 33%
Egypt	43 711	36 016	40 964	+ 14%
Nigeria	43 651	45 443	34 121	- 25%
Philippines	41 435	49 945	33 569	- 33%
Yemen	29 029	29 743	31 093	+ 5%
Malaysia	41 116	40 468	26 316	- 35%
Saudi Arabia	29 726	23 457	25 780	+ 10%
Morocco	7 560	10 574	25 461	+ 141%
Vietnam	20 558	19 917	20 336	+ 2%
Other	261 253	239 567	218 216	- 9%
Total (without UK)	803 096	773 821	694 905	 - 10%
United Kingdom°	25 171	12 945	13 923	+ 8%

* Trade with U.K. only available up to November 2022

EU EXPORTS of WMP - main destinations				
Period : January-December				
Qty Tons	2020	2021	2022	
Oman	47 698	39 118	50 856	+ 30%
China	16 085	22 521	21 301	- 5%
Kuwait	15 896	5 446	13 806	+ 154%
Trinidad,Tob	3 354	3 340	8 395	+ 151%
Dominican R.	9 717	6 509	7 802	+ 20%
Algeria	38 062	16 470	7 358	- 55%
Saudi Arabia	7 950	6 942	6 646	- 4%
Senegal	7 744	10 882	6 228	- 43%
Singapore	7 670	8 172	5 368	- 34%
Bangladesh	4 508	7 149	4 683	- 34%
Ivory Coast	3 976	5 719	3 871	- 32%
Other	151 729	147 722	88 309	- 40%
Total (without UK)	314 389	279 991	224 621	 - 20%
United Kingdom°	27 751	16 694	15 068	- 10%

* Trade with U.K. only available up to November 2022

2021 2022

EU exports to third countries (excluding UK)

1000 EUR	Jan-Dec 2021	Jan-Dec 2022	EU % change
Condensed	472 266	485 914	+ 3%
SMP	2 009 054	2 578 668	+ 28%
WMP	997 338	1 072 114	+ 7%
Butter	958 763	1 185 589	+ 24%
Butteroil	138 699	187 867	+ 35%
Cheeses	4 745 144	5 627 808	+ 19%
Wheypowder	960 032	1 152 960	+ 20%
Total	10 281 296	12 290 921	 + 20%

2021 2022

EU exports to third countries (excluding UK)

in 1 000 t	Jan-Dec 2021	Jan-Dec 2022	EU % change
Condensed	291	250	- 14%
SMP	774	695	- 10%
WMP	280	225	- 20%
Butter	181	161	- 11%
Butteroil	25	24	- 6%
Cheeses	960	923	- 4%
Wheypowder	676	619	- 8%
Total in milk equiv.	15 960	14 510	 - 9%

EU imports of butter and cheeses in 2022

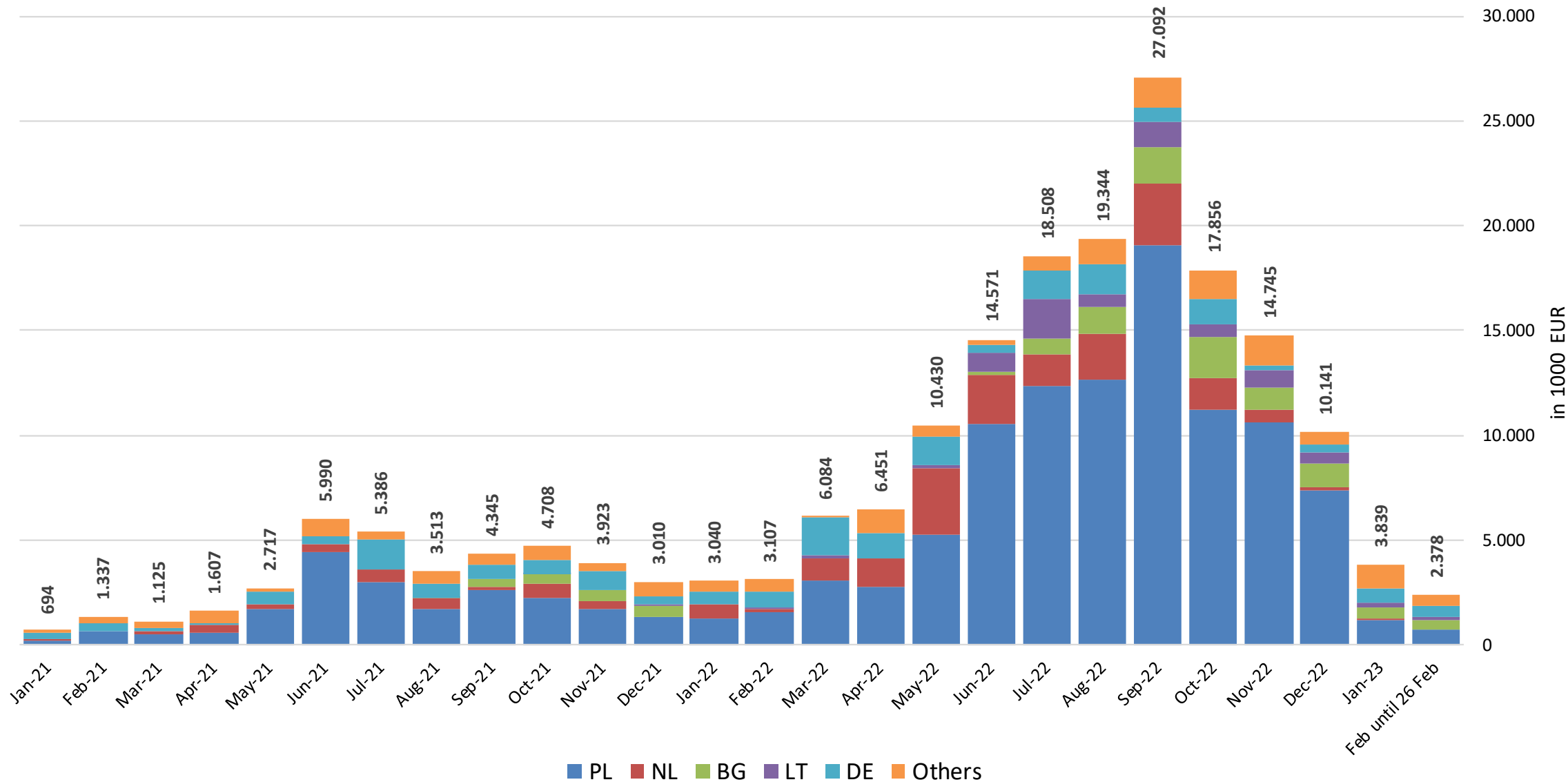
EU IMPORTS of BUTTER - main origins				
Period : January-December				
Qty Tons	2020	2021	2022	
Ukraine	5	132	6 464	+++
New Zealand	666	1 207	3 069	↑ + 154%
Turkey	9	12	2 657	+++
Norway	2	1	550	+++
USA	160	1 380	222	↓ - 84%
Egypt			92	
Iceland	100	293	74	↓ - 75%
Algeria			50	
China		88	25	↓ - 71%
Malaysia			15	
Switzerland	12	12	7	↓ - 45%
Other	330	359	10	↓ - 97%
Total (without UK)	1 284	3 483	13 235	↑ +++
United Kingdom°	23 831	22 455	29 517	↑ + 31%

° Trade with U.K. only available up to November 2022

EU IMPORTS of CHEESES - main origins				
Period : January-December				
Qty Tons	2020	2021	2022	
Switzerland	55 286	60 171	56 624	↓ - 6%
Norway	1 274	1 252	3 453	↑ + 176%
Ukraine	0	0	3 245	+++
Serbia	1 551	1 914	2 232	↑ + 17%
Turkey	809	1 079	1 604	↑ + 49%
Bosnia-Herz.	425	806	893	↑ + 11%
USA	764	274	640	↑ + 133%
Iceland	42	115	285	↑ + 147%
North Macedonia	35	71	230	↑ +++
Australia	652	538	153	↓ - 72%
Canada	59	71	136	↑ + 91%
Other	481	756	324	↓ - 57%
Total (without UK)	61 379	67 047	69 818	↔ + 4%
United Kingdom°	141 534	119 962	108 898	↓ - 9%

° Trade with U.K. only available up to November 2022

EU Imports of Milk Products from Ukraine *(in 1000 EUR)*



CHINA IMPORTS (Jan-Dec 2022 compared to 2021)

