



connect to the world of dairy

TRADE AND ECONOMICS COMMITTEE

Wednesday May 24, 2023

EDA offices, Brussels, Belgium





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EU Dairy Market Situation







EDA Trade and Economics Committee

Wednesday 24 May, 2023



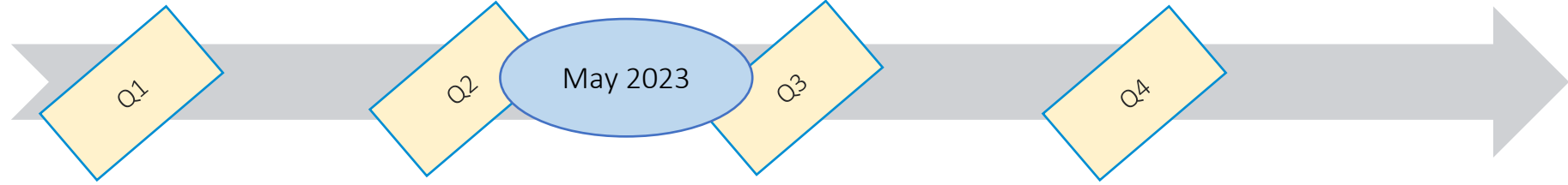
Trade & Economics' Committee Market Survey – 24/05/23

Content

Milk supply and Milk prices		Cheese	
Skim Milk Powder (SMP)		Butter	
Whole Milk Powder (WMP)		Whey	



Milk supply and Milk prices



Skim Milk Powder (SMP)

Whole Milk Powder (WMP)

Cheese

Butter

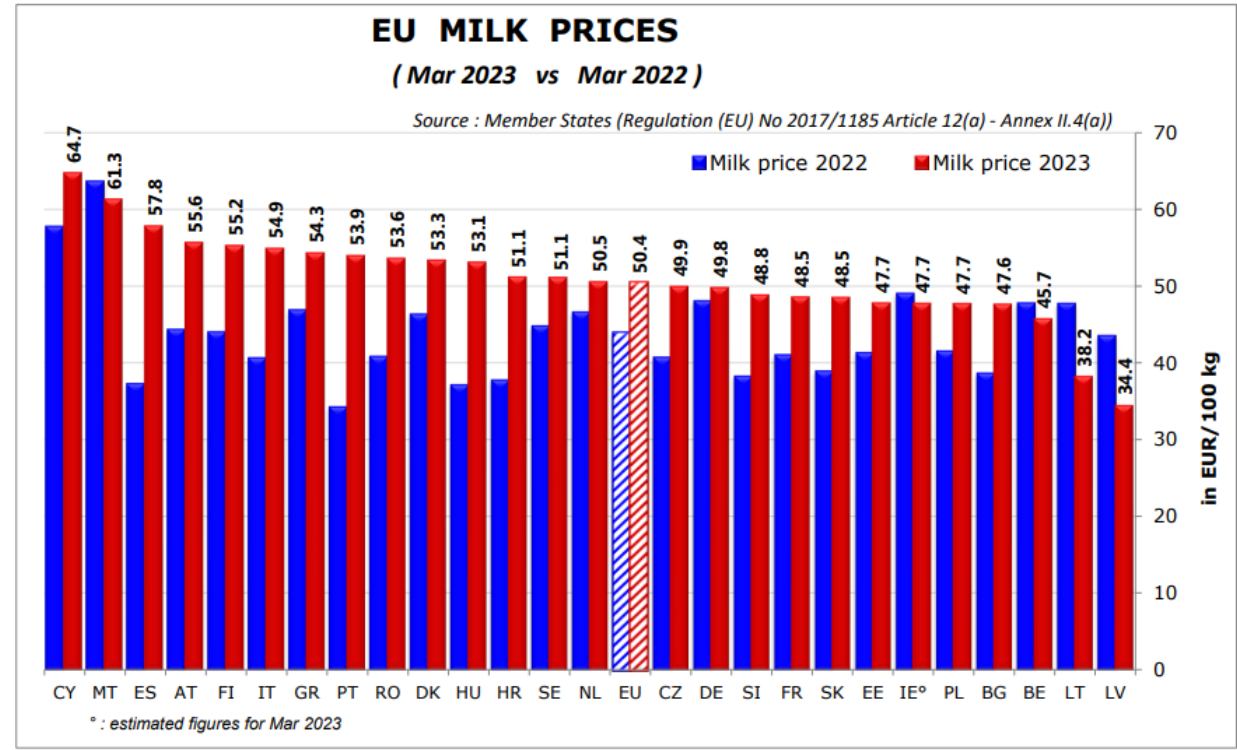
Whey

Milk deliveries trend Jan-Mar 2023/Jan-Mar 2022

- 3 Members reported increases and 5 Members reported decreases in deliveries in Jan-Mar 2023 compared to the same period in 2022.

Deliveries: expectations Q2/2023 : Q2/2022
Mixed expectations of the members regarding deliveries in the 2nd quarter of 2023.

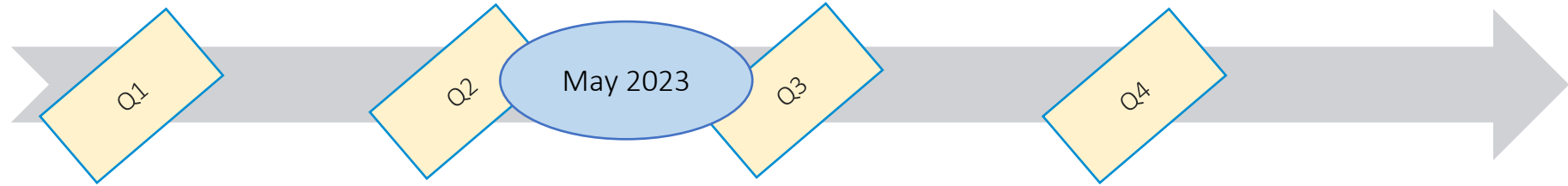
Deliveries: expectations Q3/2023 : Q3/2022
Most members expect deliveries in the 3rd quarter of 2023 to decrease or stabilize.



Trade & Economics' Committee Market Survey – 24/05/23



Skim Milk Powder (SMP)



Milk supply and Milk prices

SMP production Jan-Mar 2023: Jan-Mar 2022
Members report increases and decreases in SMP production over Jan-Mar 2023:2022.

Whole Milk Powder (WMP)

Cheese

Butter

Whey

SMP expectations Q2/2023:Q2/2022
Mixed expectations of the members regarding deliveries in the 2nd quarter of 2023.

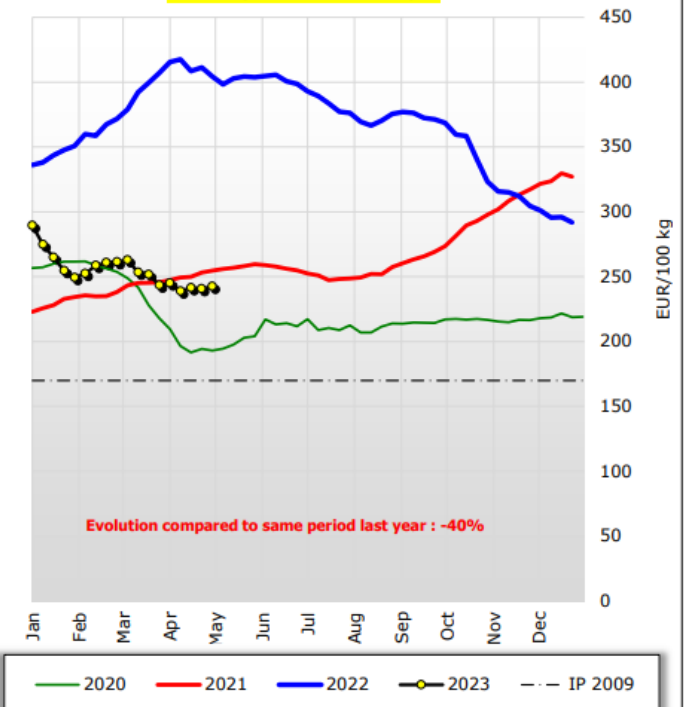
SMP expectations Q3/2023:Q3/2022
Members expect decreases for deliveries in the 3rd quarter of 2023.

SMP price

- Mixed figures reported in SMP prices reported by members for April 2023 compared to the same month of 2022
- Mixed figures reported in SMP prices reported by members for Q3 2023 compared to Q2 2022

Weekly EU SMP Prices

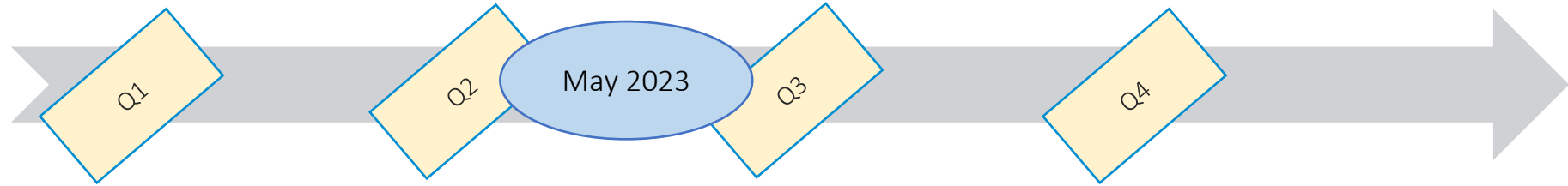
Latest price : 243 EUR/100kg



Trade & Economics' Committee Market Survey – 24/05/23



Whole Milk Powder (WMP)



Milk supply and Milk prices

Skim Milk Powder (SMP)

Cheese

Butter

Whey

WMP production Jan-Mar 2023: Jan-Mar 2022
Mixed figures reported for WMP over Jan-Mar 2023:Jan-Mar 2022.

WMP expectations Q2/2023:Q2/2022
Mixed expectations of the members regarding deliveries in the 2nd quarter of 2023.

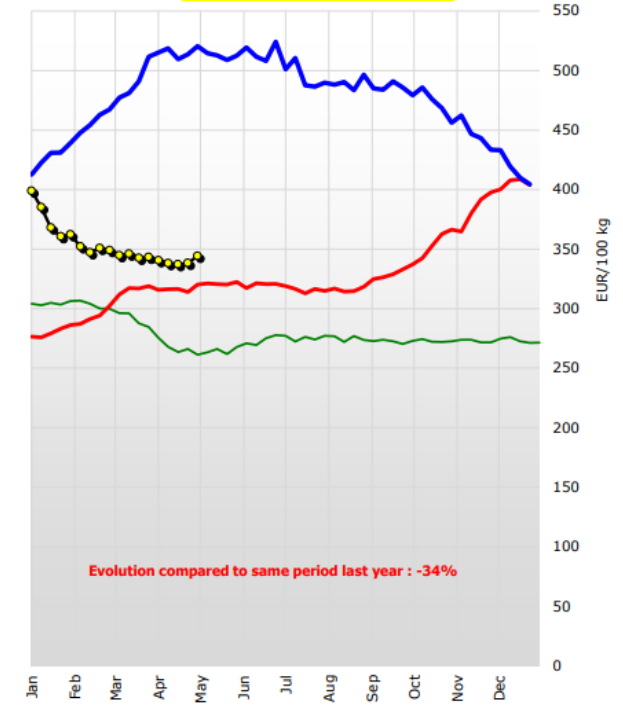
WMP expectations Q3/2023:Q3/2022
Mixed expectations of the members regarding deliveries in the 3rd quarter of 2023.

WMP price

- Countries report decreasing prices for WMP for April 2023:April 2022.
- Mixed expectations were reported for Q3/2023 compared to Q2/2023.

Weekly EU WMP Prices

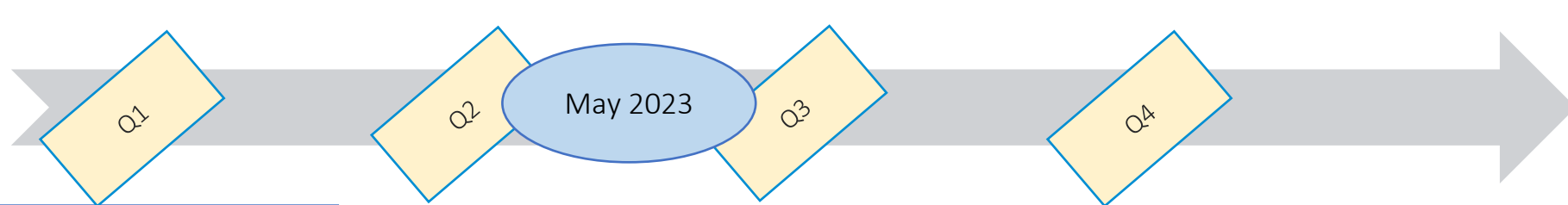
Latest price : 344 EUR/100kg



Trade & Economics' Committee Market Survey – 24/05/23



Cheese



Milk supply and Milk prices

Cheese production Jan-Mar 2023: Jan-Mar 2022
Members report decreases and increases in cheese production.

Skim Milk Powder (SMP)

Cheese expectations Q2/2023:Q2/2022
Members expect deliveries to increase and decrease in the 2nd quarter of 2023.

Whole Milk Powder (WMP)

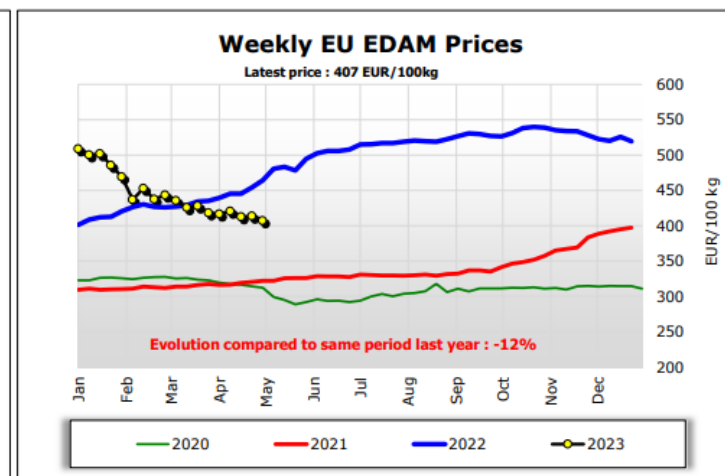
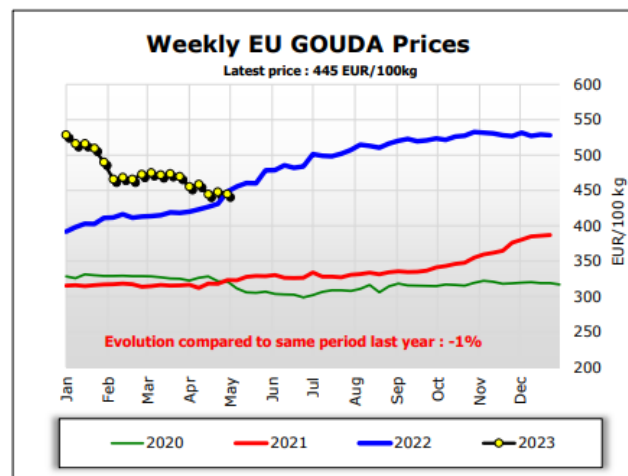
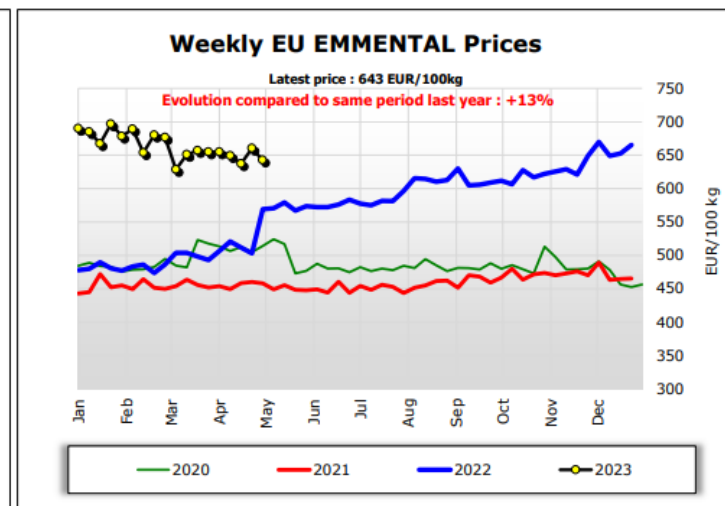
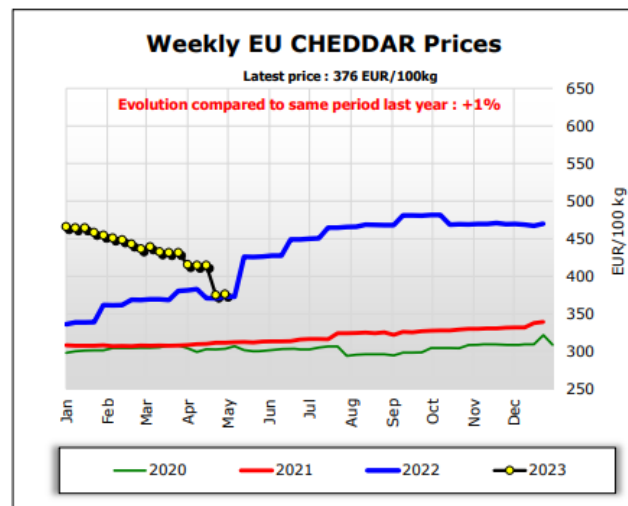
Cheese expectations Q3/2023:Q3/2022
Mixed expectations in deliveries in the 3rd quarter of 2023.

Butter

Cheese price

- Countries reported increasing and decreasing prices for cheese for April 2023 compared to April 2022.
- Mixed expectations reported by members for Q3/2023 compared to Q2/2023.

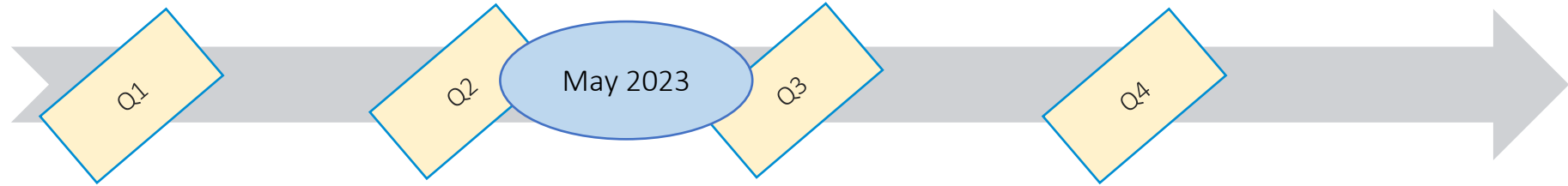
Whey



Trade & Economics' Committee Market Survey – 24/05/23



Butter



Milk supply and Milk prices

Skim Milk Powder (SMP)

Whole Milk Powder (WMP)

Cheese

Whey

Butter production Jan-Mar 2023: Jan-Mar 2022
Countries reported increases in butter production in Jan-Mar 2023 compared to the same period in 2022.

Butter expectations Q1/2023:Q1/2022
Mixed expectations on deliveries in the 2nd quarter of 2023.

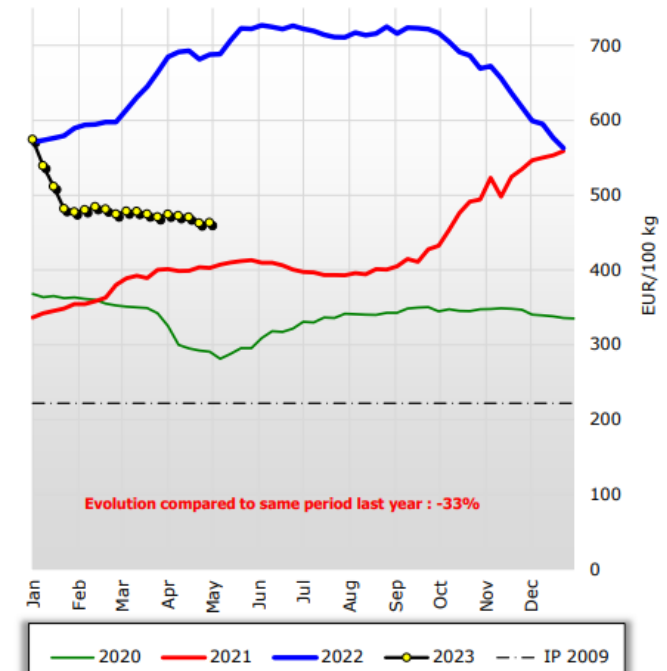
Butter expectations Q2/2023:Q2/2022
Members expect deliveries to decrease in the 3rd quarter of 2023.

Butter price

- Decreases reported in butter prices for April 2023:April 2022 by many of the countries.
- Mixed price expectations for Q3/2023 compared to Q2/2023.

Weekly EU BUTTER Prices

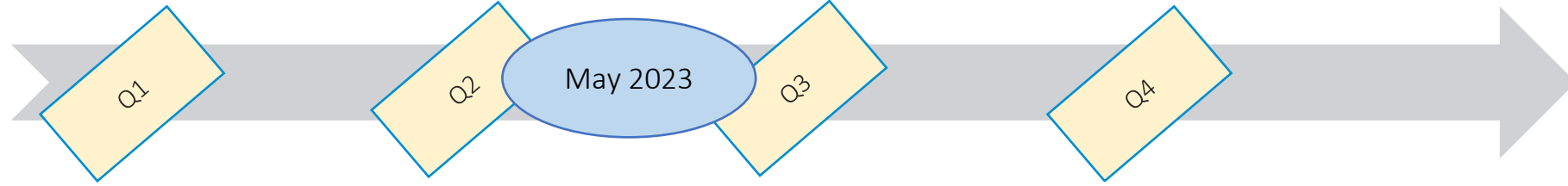
Latest price : 463 EUR/100kg



Trade & Economics' Committee Market Survey – 24/05/23



Whey



Milk supply and Milk prices

Skim Milk Powder (SMP)

Whole Milk Powder (WMP)

Cheese

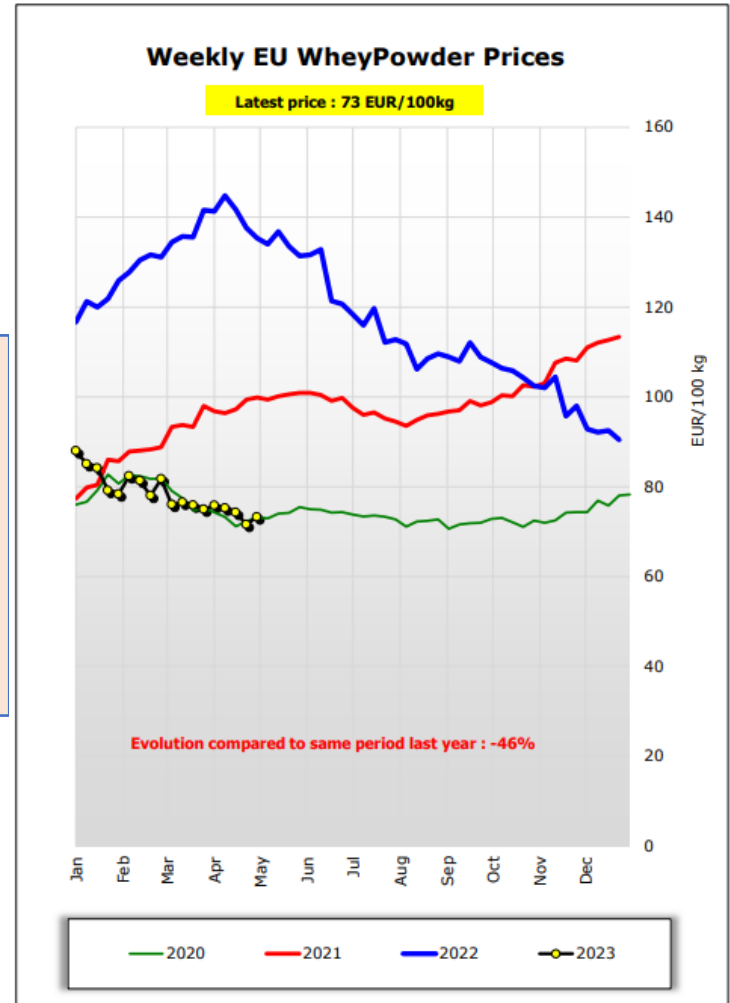
Butter

Whey production Jan-Mar 2023: Jan-Mar 2022
Mixed figures were reported for whey production according to reporting members over Mar2023:Mar2022.

Whey expectations Q2/2023:Q2/2022
Mixed expectations from members for the 2nd quarter of 2023.

Whey expectations Q3/2023:Q3/2022
Mixed expectations from members for the 3rd quarter of 2023.

Whey price
Members report decreases in whey prices for April 2023:April 2022.
Members report increasing and stable price expectations for Q3/2023 compared to Q2/2023.





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MARKET SITUATION

BY M. WOHLFARTH, ZMB



Market Information
for the
EDA Trade & Economics Committee
May 2023

The Dairy Market in General

Table 1

EU Dairy Markets Summary

in '000 t	2019 EU-28	2020 EU-27	2021 ²⁾ EU-27	2022 ²⁾ EU-27	2023 ²⁾ EU-27
Dairy Cows (December census, '000head)	22.633	20.536	20.219	20.000	19.800
Milk Deliveries to dairies	158.283	145.204	144.756	144.907	144.600
Milk for liquid consumption	29.684	23.924	23.129	22.900	23.000
Fermented Products and Desserts	8.141	7.769	7.685	7.700	7.730
Butter					
Production ³⁾	2.402	2.254	2.210	2.205	2.200
Consumption	2.180	1.997	2.017	1.991	2.010
Cheese					
Production ⁴⁾	10.870	10.562	10.720	10.680	10.740
Consumption ⁵⁾	10.074	9.372	9.551	9.491	9.570
Skim Milk Powder					
Production	1.672	1.630	1.525	1.565	1.540
Consumption	940	900	860	830	810
Whole Milk Powder production	860	858	800	770	710
Condensed Milk production	1.143	1.092	1.098	1.080	1.080
Skim Milk used for Casein	5.710	5.700	5.800	5.850	5.750
Population (million head)	513	447	447	452	453

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 2023

Milk Supplies

Table 2

EU: Cow Milk Deliveries to Dairies

'000 tonnes	2018	2019	2020	2021	2022x	Forecast 2023
EU 27_2020	142.158	142.850	145.204	144.756	144.907	144.600
EU 28	157.350	158.283	160.656	160.203	160.256	160.000
EU 27_2007	156.897	157.848	160.222	159.774	159.851	159.600
EU 25	155.134	156.071	158.393	157.969	158.053	157.760
EU 15	134.027	134.714	136.473	135.922	135.737	135.325
EU 10	21.106	21.357	21.920	22.047	22.316	22.435
EU 2	1.763	1.777	1.829	1.805	1.798	1.840
Belgium	4.079	4.177	4.329	4.308	4.450	4.550
Bulgaria	643	652	694	679	664	690
Czech Rep.	3.057	3.034	3.192	3.129	3.173	3.180
Denmark	5.615	5.615	5.666	5.644	5.664	5.670
Germany	32.491	32.442	32.552	31.942	31.947	31.900
Estonia	748	763	788	799	800	800
Greece	621	633	652	660	648	650
Spain	7.117	7.251	7.409	7.478	7.324	7.250
France	24.589	24.535	24.584	24.208	23.980	23.700
Ireland	7.813	8.226	8.545	9.017	9.084	9.200
Italy	12.071	12.117	12.668	13.057	13.000	12.800
Cyprus	228	239	274	298	287	285
Latvia	781	785	791	813	811	810
Lithuania	1.367	1.358	1.360	1.349	1.363	1.300
Luxembourg	395	409	435	s 445	s 450	:
Hungary	1.535	1.576	1.626	1.727	1.683	1.650
Croatia	453	436	434	429	405	400
Malta	40	41	43	40	40	40
Netherlands	13.881	13.802	13.987	13.599	13.761	13.800
Austria	3.183	3.140	3.137	3.154	3.246	3.200
Poland	11.963	12.183	12.434	12.481	12.759	13.000
Portugal	1.867	1.899	1.923	1.909	1.853	1.850
Romania	1.120	1.125	1.135	1.126	1.134	1.150
Slovenia	571	564	580	589	575	570
Slovakia	817	814	834	823	825	800
Finland	2.354	2.330	2.362	2.272	2.216	2.150
Sweden	2.760	2.704	2.773	2.782	2.765	2.750
UK	15.193	15.433	15.452	15.447	15.349	15.400

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

Updated May 2023

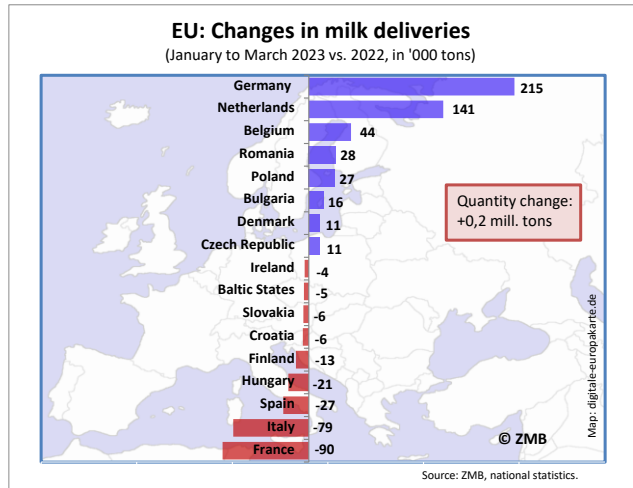
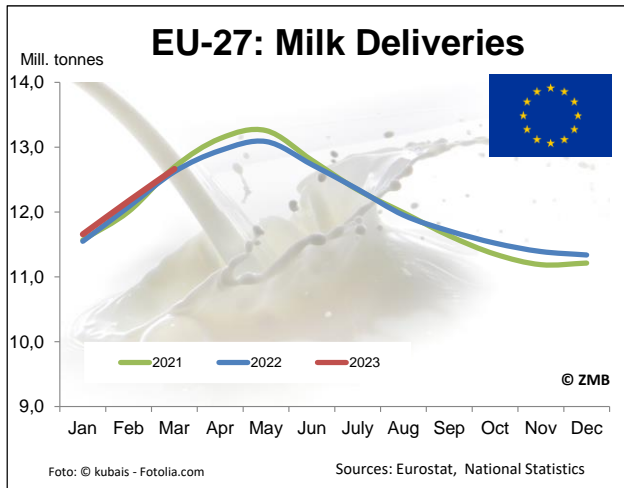


Table 3

EU Milk Deliveries	January - March			Mar.
'000 t	2022	2023*	23:22 *	23:22 *
Belgium	1.094	1.138	+ 4,0%	+ 3,2%
Bulgaria	156	172	+ 10,0%	+ 14,4%
Czech Rep.	792	803	+ 1,4%	+ 0,7%
Denmark	1.402	1.413	+ 0,8%	+ 0,5%
Germany	7.938	8.153	+ 2,7%	.
Baltic States	712	706	- 0,7%	- 0,4%
Greece	166	164	- 0,9%	-.
Spain	1.873	1.846	- 1,4%	- 0,4%
France	6.173	6.083	- 1,5%	-.
Ireland	1.400	1.396	- 0,3%	- 1,8%
Italy	3.395	3.316	- 2,3%	-.
Croatia	106	100	- 5,8%	-.
Hungary	444	423	- 4,8%	- 4,4%
Netherlands	3.413	3.554	+ 4,1%	+ 3,7%
Austria	845	843	- 0,2%	- 0,1%
Poland	3.202	3.230	+ 0,9%	+0,7%
Portugal	474	474	- 0,1%	+0,1%
Romania	255	284	+ 11,1%	.
Slovenia	147	143	- 2,5%	-2,8%
Slovakia	209	204	- 2,7%	-3,2%
Finland	570	557	- 2,4%	-2,8%
Sweden	706	717	+ 1,5%	.
EU-27	35.658	35.899	+ 0,7%	+0,4%

*) Provisional/ Estimate.

Sources: ZMB, national statistics.

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Table 4

Milk Output in different countries				
000 t	January-	2022	2023*	23:22*
U. Kingdom	Mar.	3.782	3.829	+1,2%
Switzerland	Mar.	844	871	+3,2%
Norway	Jan.	139	.	-.
Serbia	Mar.	213	212	-0,9%
Europe without EU	cum.	4.978	.	.
Russia ¹⁾	Feb.	4.416	4.582	+3,8%
Belarus ¹⁾	Mar.	1.862	1.941	+4,2%
Kasachstan ¹⁾	Mar.	989	1.022	+3,3%
3 CIS countries	cum.	7.267	7.544	+3,8%
Canada	Jan.	1.553	1.589	+2,3%
USA ¹⁾	Mar.	25.540	25.784	+1,0%
Mexico	Mar.	3.138	3.219	+2,6%
North America	cum.	30.231	30.591	+1,2%
Argentina ¹⁾	Mar.	2.665	2.660	-0,2%
Brazil	Jan.	6.115	6.025	-1,2%
Chile	Mar.	568	527	-7,4%
Uruguay	Mar.	446	425	-4,7%
Peru	Feb.	368	368	-0,1%
South America	cum.	10.163	.	-.
Australia ¹⁾	Mar.	1.964	1.886	-4,0%
New Zealand ¹⁾	Mar.	5.906	5.981	+1,3%
Oceania	cum.	7.870	7.867	-0,0%
Asian countries:				
Turkey	Mar.	2.485	2.579	+3,8%
Japan	Mar.	1.921	1.836	-4,4%

1) Milk production. *) Provisional/ Estimate.

Sources: ZMB, national statistics.

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Table 5

EU-27: Production of Dairy Products				
000 t	January - February			Feb.
	2022	2023*	23:22 *	23:22 *
Liquid milk	3.927	3.961	+ 0,9%	+ 0,8%
Cream	389	404	+ 3,9%	+ 4,4%
Fermented Products	1.402	1.398	- 0,2%	- 1,6%
Butter	335	351	+ 4,9%	+ 2,2%
Cheese	1.489	1.499	+ 0,7%	+ 1,0%
WMP etc.	98	95	- 3,0%	+ 2,6%
SMP	230	239	+ 4,0%	+ 2,0%
Condensed milk	157	151	- 3,4%	- 4,2%

*) Provisional.

Sources: ZMB, Eurostat, national statistics.

© ZMB

Table 6

EU Balance Sheet of Milk for Liquid Consumption						
'000 t	2018	2019	2020	2021*	2022**	2023**
	EU 28	EU28	EU-27	EU-27	EU27	EU27
Production	30.310	29.684	23.924	23.129	22.900	23.000
Imports	4	6	95	50	50	50
Exports	727	892	1.049	1.096	800	700
Sales	29.587	28.798	22.970	22.083	22.150	22.350
Per capita (kg)	57,7	56,1	51,3	49,4	49,0	49,3

*)Provisional **) Estimation/Forecast.

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

Updated May 2023

Source: ZMB

Table 7

EU Butter Balance Sheet						
'000 t	2018	2019	2020	2021	2022*	2023**
	EU 28	EU28	EU-27	EU-27	EU27	EU27
Initial stocks	90	140	146	135	110	140
Total production	2.342	2.402	2.254	2.210	2.205	2.200
- in dairies ¹⁾	2.322	2.382	2.234	2.190	2.185	2.180
- on farms	20	20	20	20	20	20
Imports	22	15	52	50	76	80
-thereof from UK	.	.	47	40	45	45
Exports	163	218	320	268	260	250
-thereof to UK	.	.	79	55	69	70
Final stocks	140	160	135	110	140	160
thereof public stocks	0	0	0	0	0	0
Disappearance	2.151	2.180	1.997	2.017	1.991	2.010
Per capita (kg)	4,2	4,2	4,5	4,5	4,4	4,4

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

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

Updated May 2023

Source: ZMB

Table 8

EU Cheese Balance Sheet						
'000 t	2018	2019	2020	2021	2022*	2023**
	EU 28	EU28	EU-27	EU-27	EU27	EU27
Production	10.534	10.690	10.407	10.560	10.530	10.590
- from cows' milk in dairies	9.514	9.710	9.427	9.570	9.540	9.600
- on farms	100	100	100	100	100	100
- from other milk	920	880	880	890	890	890
Imports	59	63	222	196	186	190
-thereof from UK	.	.	161	129	116	110
Processing addition ¹⁾	180	180	155	160	150	150
Available	10.773	10.933	10.784	10.917	10.866	10.930
Exports	833	880	1.402	1.385	1.346	1.360
-thereof to UK	.	.	493	430	420	400
Stock Change	20	-20	10	-20	30	0
Consumption	9.920	10.074	9.372	9.551	9.491	9.570
- per capita (kg)	19,4	19,6	21,0	21,4	21,0	21,1

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

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

Source: ZMB

Updated May 2023

Table 9

EU Balance Sheet of Whole Milk Powder						
'000 t	2018	2019	2020	2021	2022*	2023**
	EU 28	EU28	EU-27	EU-27	EU27	EU27
Production	840	860	858	800	770	710
Imports	2	6	27	11	20	10
-thereof from UK	.	.	26	10	17	14
Exports	334	297	340	298	241	200
-thereof to UK	.	.	35	20	16	20
Change in stocks	20	50	20	0	35	20
Sales	488	518	525	513	514	500

*)Provisional **) Forecast.

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

Source: ZMB

Updated May 2023

Table 10

EU SMP Balance Sheet						
'000 t	2018	2019	2020	2021	2022*	2023**
	EU 28	EU28	EU-27	EU-27	EU-27	EU-28
Opening stocks	530	442	213	148	56	117
Production	1.675	1.672	1.630	1.525	1.565	1.540
Imports	4	6	36	33	37	40
-thereof from UK	.	.	34	23	17	25
Available	2.208	2.120	1.879	1.706	1.658	1.697
Consumption	950	940	900	860	830	810
- other than feed	800	800	790	780	760	740
- in feed	150	140	110	80	70	70
Exports	816	962	831	790	711	750
-thereof to UK	.	.	28	15	16	10
Ending stocks	442	217	148	56	117	137
- in intervention	176	0	0	0	0	0

*)Provisional **) Forecast.

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

Source: ZMB

Updated May 2023

Table 11

EU Whey Powder Balance Sheet				
'000 t	2020*	2021**	2022**	2023**
	EU 27	EU 27	EU 27	EU 27
Production	2.125	2.180	2.160	2.150
Imports	52	45	50	50
-thereof from UK	37	31	35	30
Exports	691	715	640	650
-thereof to UK	56	40	40	40
Stock change	-20	-30	40	30
Consumption	1.506	1.540	1.530	1.520

Partly desugared and demineralised whey powder included.

*) Estimated. **) Forecast.

Source: ZMB

Updated March 2023

Table 12

EU Casein Balance Sheet				
'000 t	2020*	2021*	2022*	2023**
	EU 27	EU 27	EU 27	EU 27
Production¹⁾	177	182	184	184
Import	19	17	17	12
-thereof from UK	2	0	0	0
Exports	95	105	95	92
-thereof to UK	4	4	4	4
Stock change ²⁾	-2	-8	8	8
Consumption	103	102	98	96

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

2) Total stocks (manufacturers and users)

Source: ZMB

Updated March 2023

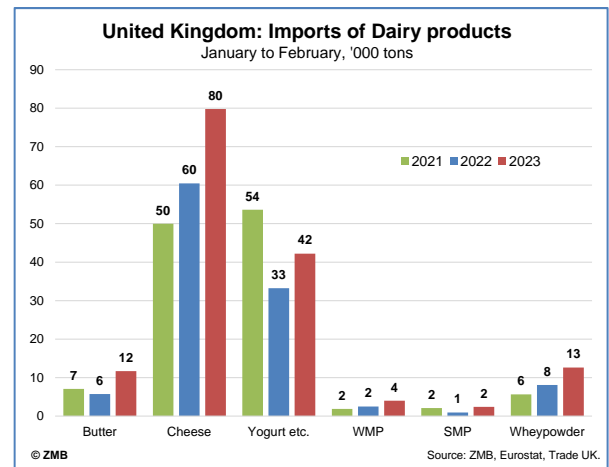
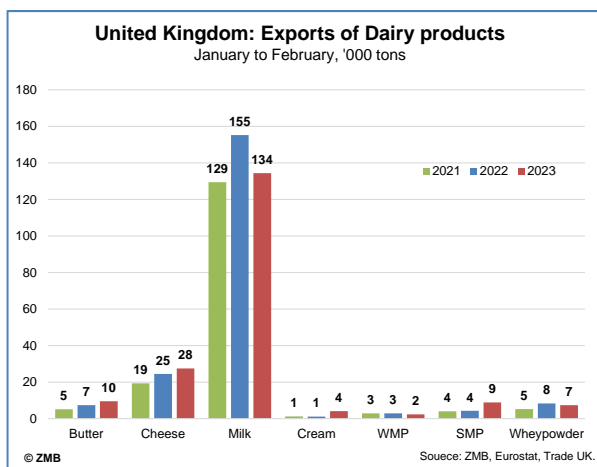
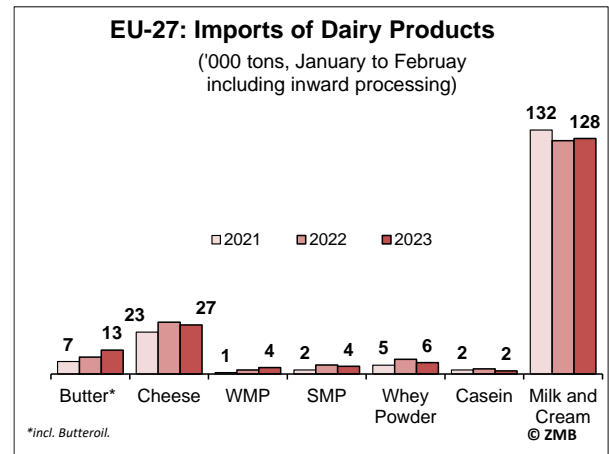
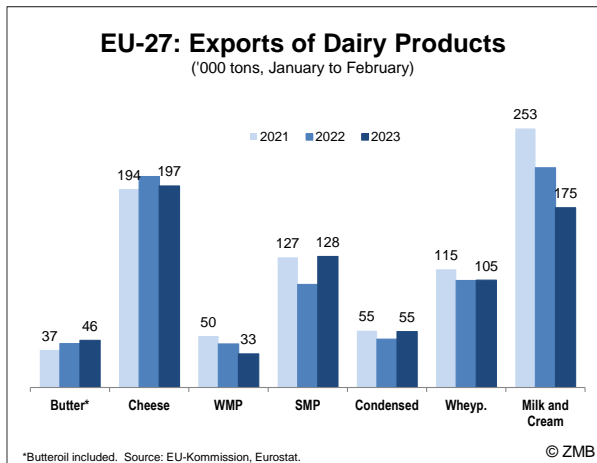


Table 13

EU: Exports of Butter <85%¹⁾

' 000 t	Months	2020	2021	2022	Months	2022	2023	2022	2023
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ²⁾	EU-27 ²⁾		
Belgium	12	18,1	12,4	13,1	2	2,8	2,6	1,5	0,1
Denmark	12	29,3	29,0	29,6	2	5,6	5,1	0,9	0,9
Germany	12	14,1	13,8	9,7	2	2,5	2,2	0,0	0,0
Spain	12	1,8	1,7	1,5	2	0,2	0,3	0,0	0,0
France	12	41,4	44,1	48,5	2	8,3	7,6	0,9	0,8
Ireland	12	97,7	78,5	82,8	2	8,9	14,7	3,8	4,1
Lithuania	12	4,8	1,1	2,5	2	0,0	0,4	0,0	0,0
Netherlands	12	31,8	27,3	22,9	2	4,5	4,7	0,1	0,2
Portugal	12	6,7	4,6	2,7	2	1,2	0,4	0,0	0,0
Poland	12	13,2	7,1	4,8	2	0,7	1,7	0,2	0,1
Finland	12	5,3	4,4	3,9	2	0,9	0,6	.	.
All other	12	4,1	3,4	2,6	2	0,7	0,6	0,0	0,0
EU	12	268,2	227,5	224,7	2	36,6	40,7	7,3	6,3

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

Sources: ZMB, EU-Comm./ EUROSTAT.

Table 14

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

' 000 t	Months	2020	2021	2022	Months	2022	2023	2022	2023
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ²⁾	EU-27 ²⁾		
Belgium	12	4,5	4,1	3,9	2	0,7	0,8	0,0	0,0
Spain	12	0,6	0,4	0,3	2	0,1	0,0	.	0,0
France	12	6,8	7,0	5,0	2	1,2	1,0	0,0	0,0
Ireland	12	4,9	4,2	4,7	2	0,6	0,5	0,6	0,5
Netherlands	12	19,0	11,9	10,1	2	2,4	1,8	0,3	0,3
Sweden	12	0,0	0,0	0,0	2	0,0	0,0	.	.
All other	12	2,2	2,5	1,5	2	0,3	0,3	0,0	0,0
EU	12	38,0	30,0	25,6	2	5,3	4,4	0,9	0,8

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

Sources: ZMB, EU-Comm./ EUROSTAT.

Table 15

EU: Imports of Butter and Butteroil¹⁾

' 000 t	Months	2020	2021	2022	Months	2022	2023	2022	2023
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ²⁾	EU-27 ²⁾		
Belgium	12	18,6	11,5	6,9	2	0,1	2,2	0,1	2,1
Denmark	12	2,8	2,8	11,8	2	1,2	0,7	0,0	0,0
France	12	3,9	7,3	12,9	2	2,5	2,4	1,8	1,9
Netherlands	12	8,4	11,2	24,9	2	3,5	5,2	3,4	0,6
All other	12	17,6	10,8	20,5	2	1,8	2,4	1,8	2,2
EU	12	51,3	43,5	77,0	2	9,2	12,9	7,1	6,8

1) From 3rd countries. 2) Incl. trade with UK.

Sources: ZMB, EU-Comm./ EUROSTAT.

Table 16

Exports of Butter and Butteroil

1.000 tonnes	Mon.	2021	2022	2023	± %
<i>EU - 27</i>	<i>I - II</i>	<i>36,7</i>	<i>43,0</i>	<i>46,0</i>	<i>+ 7,2</i>
<i>United Kingdom</i>	<i>I - II</i>	<i>5,2</i>	<i>7,4</i>	<i>9,6</i>	<i>+ 29,4</i>
<i>- of which to EU-27</i>	<i>I - II</i>	<i>4,9</i>	<i>6,9</i>	<i>8,9</i>	<i>+ 29,3</i>
New Zealand	I - II	90,7	80,1	85,6	+ 6,8
Australia	I - II	4,3	4,3	1,3	- 69,7
USA	I - III	11,9	19,7	12,8	- 34,9
Switzerland	I - II	0,1	0,0	0,0	-
Argentina	I - II	5,6	6,0	5,7	- 4,2
Uruguay	I - III	3,1	3,8	3,5	- 8,5
Türkei	I - I	0,1	2,0	0,0	- 97,8
India	I - I	1,0	6,7	1,2	- 81,9
Total amount*		158,6	172,9	165,8	- 4,1

* 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	2020	2021	2022	Months	2022	2023	2022	2023
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ²⁾	EU-27 ²⁾	Export to UK	Export to UK
Belgium	12	49,8	68,2	68,2	2	10,9	11,5	7,3	7,1
Bulgaria	12	8,4	10,3	10,3	2	1,7	1,1	0,2	0,3
Czech Rep.	12	5,1	8,5	6,0	2	1,2	1,1	0,1	0,1
Denmark	12	137,3	137,3	134,1	2	20,8	21,9	6,8	8,6
Greece	12	24,0	25,2	26,0	2	3,5	3,1	1,6	1,3
Spain	12	25,9	29,3	31,1	2	5,2	4,4	0,9	0,5
Germany	12	223,9	211,9	197,0	2	34,0	31,5	8,1	8,0
France	12	186,4	178,9	172,3	2	27,4	24,1	8,9	8,4
Ireland	12	203,2	163,9	142,8	2	13,0	16,0	5,8	9,1
Italy	12	147,2	161,4	170,0	2	25,4	24,7	6,1	6,0
Lithuania	12	17,2	17,1	12,5	2	2,2	1,5	0,1	0,1
Hungary	12	13,8	14,6	15,3	2	2,9	3,2	0,4	0,2
Netherlands	12	191,2	193,3	203,4	2	32,8	28,2	4,4	3,6
Austria	12	21,7	21,9	21,1	2	3,6	3,6	0,2	0,3
Poland	12	88,7	87,4	71,6	2	12,6	11,0	2,5	2,4
Finland	12	6,4	5,3	4,0	2	0,7	0,7	.	0,0
All other	12	51,3	50,7	55,6	2	8,1	9,2	4,3	4,8
EU	12	1.401,6	1.385,2	1.341,4	2	206,0	196,6	57,8	60,8

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

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 18
Exports of Cheese

1.000 tonnes	Mon.	2021	2022	2023	± %
EU - 27	I - II	193,7	206,0	196,6	- 4,5
United Kingdom	I - II	19,4	24,6	27,5	+ 12,2
- of which to EU-27	I - II	14,2	18,9	22,5	+ 19,0
Switzerland	I - III	19,6	18,4	17,1	- 7,0
New Zealand	I - II	68,2	56,7	69,8	+ 23,0
Australia	I - II	23,5	24,8	19,5	- 21,4
USA	I - III	91,5	104,1	108,4	+ 4,2
Argentina	I - II	13,9	11,2	14,3	+ 28,2
Uruguay	I - III	6,4	5,9	6,4	+ 8,8
Turkey	I - I	3,0	3,1	3,4	+ 11,0
Total amount*		439,2	454,7	463,1	+ 1,9

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

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Table 19

EU: Exports of Condensed and Evaporated Milk¹⁾

' 000 t	Months	2020	2021	2022	Months	2022	2023	2022	2023
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ²⁾	EU-27 ²⁾	Export to UK	
Belgium	12	26,4	31,5	32,9	2	5,7	4,7	3,1	2,8
Germany	12	66,0	58,1	53,7	2	8,4	12,7	1,3	1,4
Spain	12	27,6	27,0	20,2	2	3,8	4,9	0,3	0,5
France	12	3,1	1,3	1,7	2	0,2	0,1	0,0	0,1
Litauen	12	11,8	15,5	6,7	2	0,8	0,7	0,0	0,1
Netherlands	12	193,6	197,2	175,4	2	27,6	30,6	1,9	2,5
Poland	12	4,7	3,1	1,7	2	0,3	0,2	0,1	0,1
<i>All other</i>	12	5,2	7,3	3,3	2	0,5	0,6	0,1	0,1
EU	12	338,3	340,9	295,8	2	47,2	54,6	6,8	7,6

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	2020	2021	2022	Months	2022	2023	2022	2023
		EU-27 ³⁾	EU-27 ³⁾	EU-27 ³⁾		EU-27 ³⁾	EU-27 ³⁾	Export to UK	
Belgium	12	47,8	24,6	10,9	2	1,6	2,1	0,1	0,1
Czech Rep.	12	2,9	2,4	2,7	2	0,6	0,4	0,0	0,0
Denmark	12	43,3	48,6	36,5	2	8,7	4,3	.	0,0
Germany	12	19,2	13,8	28,2	2	6,2	4,1	0,2	0,3
France	12	39,9	42,7	32,4	2	6,1	4,1	1,3	0,6
Ireland	12	44,0	31,1	17,3	2	2,2	2,5	0,3	0,6
Netherlands	12	109,6	99,5	81,1	2	11,5	9,1	0,5	0,6
Poland	12	8,4	5,2	3,0	2	0,4	0,4	0,0	0,0
Sweden	12	19,4	20,4	21,7	2	4,0	5,0	0,0	.
<i>All other</i>	12	10,4	10,0	7,4	2	1,2	0,9	0,0	0,1
EU	12	344,8	298,4	241,2	2	42,5	32,8	2,3	2,3

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

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 21

Exports of Whole Milk Powder

1.000 tonnes	Mon.	2021	2022	2023	± %
EU - 27	I - II	50,2	42,5	32,8	- 22,7
United Kingdom	I - II	2,9	2,9	2,4	- 18,8
- of which to EU-27	I - II	0,4	2,2	1,2	- 43,2
New Zealand	I - II	298,2	238,8	218,3	- 8,6
Australia	I - II	7,5	10,5	6,2	- 40,6
USA	I - III	9,9	9,0	4,6	- 48,7
Argentina	I - II	28,4	29,3	19,9	- 32,3
Uruguay	I - III	34,0	33,2	38,5	+ 16,0
Total amount*		428,2	351,0	314,1	- 10,5

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

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Table 22

EU: Exports Skim Milk Powder¹⁾

' 000 t	Months	2020	2021	2022	Months	2022	2023	2022	2023
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ²⁾	EU-27 ²⁾	Export to UK	Export to UK
Belgium	12	150,9	138,5	143,9	2	25,1	22,9	0,0	0,0
Czech Rep.	12	10,9	9,9	8,7	2	1,5	1,8	0,0	0,0
Denmark	12	12,4	7,9	4,7	2	1,3	0,2	.	.
Germany	12	142,7	116,8	85,5	2	13,3	20,2	0,0	0,0
Spain	12	10,6	12,6	2,6	2	0,8	0,3	0,0	0,0
France	12	158,5	165,0	128,6	2	20,4	23,5	0,3	0,3
Ireland	12	96,7	97,3	89,2	2	7,2	11,9	1,0	1,5
Latvia	12	0,5	0,4	0,1	2	0,1	0,1	.	.
Lithuania	12	18,3	13,6	15,3	2	0,5	4,5	.	.
Netherlands	12	85,2	79,6	96,1	2	12,0	14,6	0,0	0,1
Poland	12	80,4	71,8	71,1	2	7,7	15,5	0,0	0,0
Finland	12	36,4	37,0	34,1	2	5,4	5,7	.	0,0
Sweden	12	18,7	32,3	26,5	2	4,4	6,0	0,0	0,1
<i>All other</i>	12	8,9	5,3	4,6	2	0,7	0,8	0,0	0,0
EU	12	831,0	788,1	710,8	2	100,6	127,9	1,5	2,0

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

Sources: ZMB, EU-Comm./ EUROSTAT.

Table 23

Exports of Skim Milk Powder

1.000 tonnes	Mon.	2021	2022	2023	± %
EU - 27	I - II	127,1	100,6	127,9	+ 27,1
United Kingdom	I - II	4,1	4,4	8,9	+ 103,0
- of which to EU-27	I - II	2,0	1,7	3,3	+ 87,3
New Zealand	I - II	58,1	57,9	98,9	+ 70,9
Australia	I - II	27,3	33,3	21,6	- 35,2
USA	I - III	218,0	203,0	209,5	+ 3,2
Canada	I - II	2,8	4,0	6,1	+ 52,0
Turkey	I - I	2,9	3,5	0,2	- 93,2
India	I - II	8,1	6,7	0,5	- 92,4
Argentina	I - II	5,5	4,0	3,8	- 6,5
Uruguay	I - III	3,0	6,3	3,3	- 48,1
Total amount*		457,2	428,7	480,6	+ 12,1

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

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Table 24

EU: Exports of Whey Powder¹⁾

1.000 t	Months	2020	2021	2022	Months	2022	2023	2022	2023
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ²⁾	EU-27 ²⁾	Export to UK	
Belgium	12	8,8	4,7	3,4	2	0,7	0,6	0,0	0,0
Czech Rep.	12	23,2	26,5	21,4	2	4,6	4,4	.	0,0
Denmark	12	10,3	8,0	10,0	2	1,5	1,7	.	.
Germany	12	112,2	120,9	122,2	2	21,4	20,5	1,0	1,2
Estonia	12	2,5	1,8	1,3	2	0,3	0,4	.	.
Spain	12	24,8	29,7	25,0	2	3,5	3,6	0,1	0,0
France	12	155,3	190,5	157,5	2	30,2	22,5	0,2	0,3
Ireland	12	82,2	80,6	80,8	2	8,1	7,7	3,3	3,5
Latvia	12	6,9	7,5	6,4	2	0,8	1,4	.	.
Lithuania	12	20,8	21,3	17,2	2	2,8	2,2	.	0,1
Netherlands	12	82,1	70,8	69,8	2	9,2	9,4	0,8	0,8
Austria	12	4,9	2,4	3,0	2	0,3	0,1	.	0,0
Poland	12	120,3	107,9	101,6	2	13,5	23,2	0,0	0,0
Finland	12	17,8	17,0	18,4	2	3,3	2,3	.	.
Other	12	20,2	25,2	25,1	2	4,2	4,9	0,1	0,4
EU	12	692,2	714,9	663,0	2	104,4	104,8	5,5	6,4

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

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 25

Exports of Whey Powder

tonnes	Mon.	2021	2022	2023	± %
EU - 27	I - II	115.337	104.397	104.763	+ 0,4
United Kingdom	I - II	5.262	8.364	7.391	- 11,6
- of which to EU-27	I - II	3.217	6.691	5.566	- 16,8
USA (Whey products)	I - III	139.198	131.586	129.172	- 1,8
- Whey Powder	I - III	60.342	46.517	50.551	+ 8,7
- WPC	I - III	38.201	38.412	34.562	- 10,0
- Mod Whey	I - III	40.655	46.657	44.029	- 5,6
Australia	I - II	6.753	5.418	5.649	+ 4,3
New Zealand	I - II	2.656	3.089	2.885	- 6,6
Argentina	I - II	10.420	9.417	9.756	+ 3,6
Canada	I - II	10.456	10.017	10.059	+ 0,4
Turkey	I - I	4.443	4.290	1.068	- 75,1
Total amount*		291.308	269.885	265.176	- 1,7

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	2020	2021	2022	Months	2022	2023	2022	2023
		EU-27 ¹⁾	EU-27 ¹⁾	EU-27 ¹⁾		EU-27 ¹⁾	EU-27 ¹⁾	Export to UK	
Denmark	12	0,0	0,1	0,4	2	0,1	0,0	0,0	0,0
France	12	24,5	24,1	21,0	2	3,4	3,1	0,0	0,1
Netherlands	12	2,7*	2,5*	2,6*	2	0,4*	0,2*	0,0*	0,0*
Germany	12	11,8	14,3	11,9	2	2,3	1,4	0,0	0,0
Ireland	12	36,3	44,3	40,3	2	2,8	2,8	0,3	0,6
Poland	12	7,0	7,4	8,4	2	1,2	1,7	0,0	.
All other	12	4,5	6,4	4,7	2	0,9	0,6	0,0	0,0
EU-27¹⁾	12	86,8	99,1	89,2	2	11,0	9,9	0,4	0,7

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

1) Incl. trade with UK.

Sources: ZMB, EU-Comm./EUROSTAT.

Table 27

Protein-Products-Production

000 t	January - February		
	2022	2023*	23:22 *
Casein, France	7,9	8,6	+ 7,9%
MPC, USA	19,5	18,2	- 6,7%
WPC, USA	33,4	35,4	+5,7%
WPI, USA	10,4	7,9	-24,3%
Laktose, USA	81,4	78,1	-4,1%

*) Provisional. 1) January to January.

Sources: ZMB, national statistics.

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Table 28

Imports of Casein and Caseinates				January to February	
' 000 t	2020	2021	2022	2022	2023
EU-27 (Incl IP.)	18,5	17,1	16,5	2,8	1,6
USA²	66,4	74,9	104,6	23,2	28,8
- from					
total EU	36,1	38,7	63,8	10,7	19,2
- Ireland	15,6	15,4	35,0	5,3	7,8
- France	5,8	6,4	9,8	1,7	3,4
- Germany	1,1	1,2	1,1	0,2	0,6
- Netherlands	6,4	7,4	8,1	1,9	2,1
- Poland	3,0	3,3	4,1	0,6	2,1
- Other M. C.	4,2	4,9	5,6	1,0	3,2
India	0,7	2,2	4,8	1,6	1,7
New Zealand	23,7	27,0	27,0	8,0	6,3
Japan	12,5	13,0	13,7	2,3	2,7
China¹	29,7	39,3	36,8	2,7	2,8
Mexico¹	19,8	23,6	.	0,8	.
South Korea¹	7,8	8,7	.	1,3	0,4
Malaysia¹	4,5	5,3	.	.	.
Thailand¹	5,9	5,3	5,7	0,5	0,3
Indonesia¹	9,6	9,8	9,8	0,4	0,6

1) January to January. 2) January to March.

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

Table 29

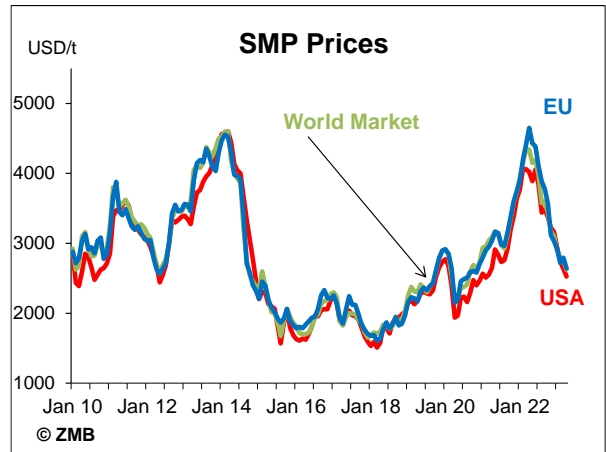
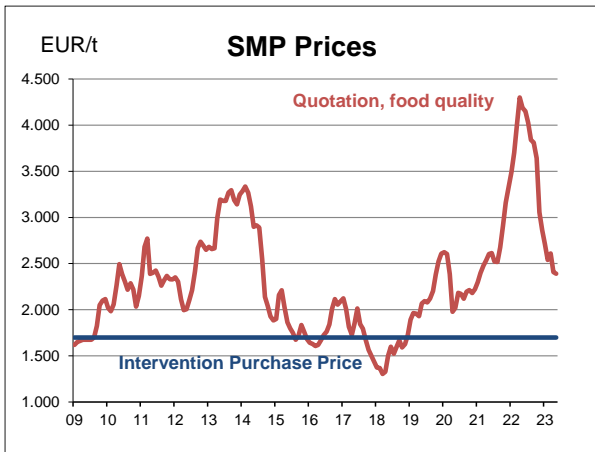
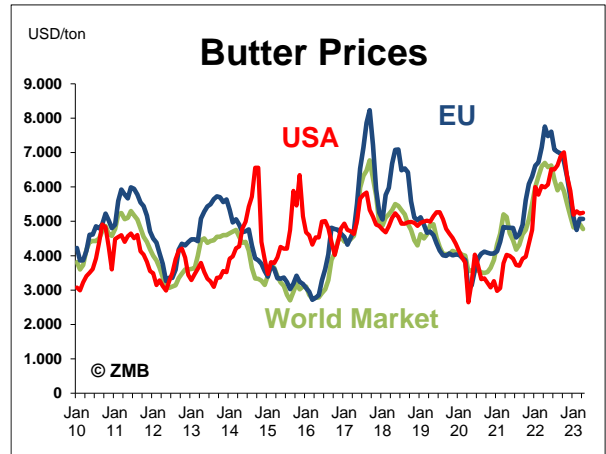
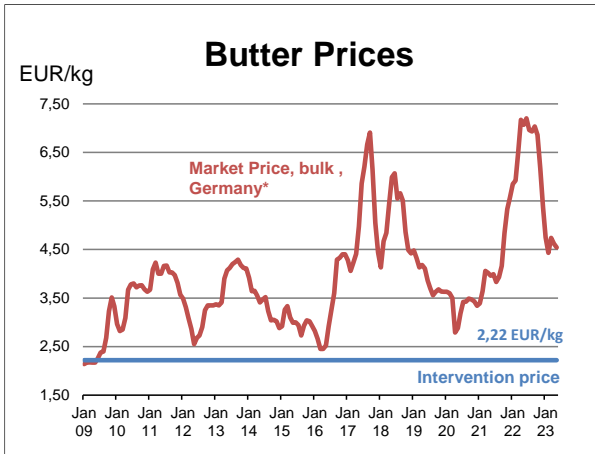
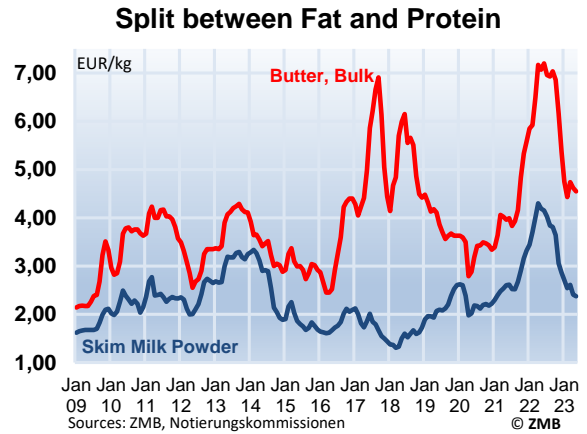
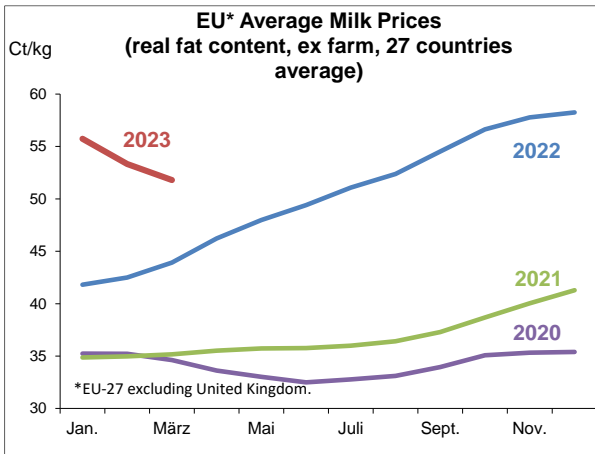
EU: Exports of Lactose¹⁾

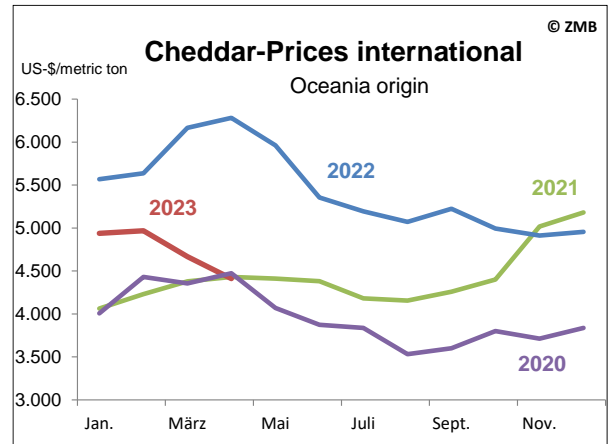
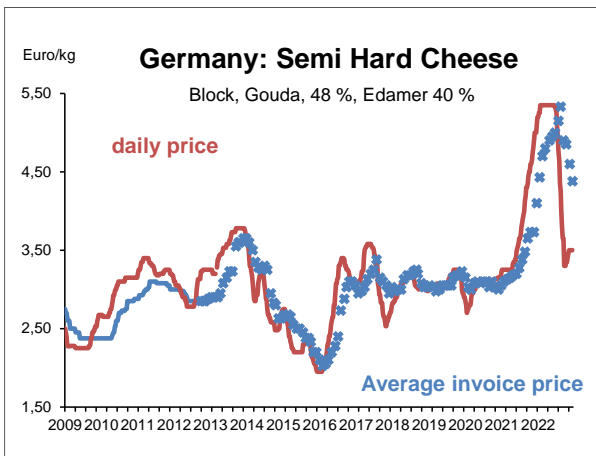
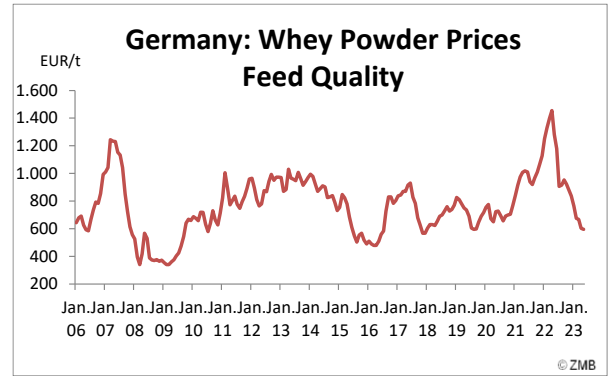
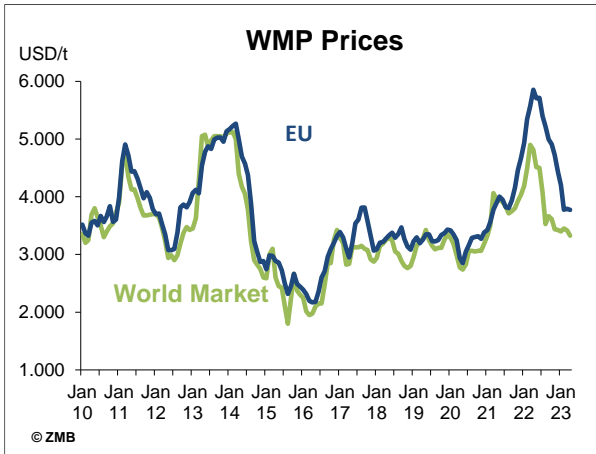
1.000 t	Months	2020	2021	2022	Months	2022	2023	2022	2023
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ²⁾	EU-27 ²⁾	Export to UK	
Germany	12	120,4	119,0	114,3	2	19,8	18,7	0,8	0,7
Ireland	12	2,7	0,6	0,4	2	0,2	0,0	0,0	0,0
France	12	31,7	27,9	23,1	2	4,0	4,3	0,4	0,4
Italy	12	18,1	19,8	17,8	2	2,9	3,9	.	.
Latvia	12	0,5	0,0	1,0	2	0,0	.	.	.
Lithuania	12	8,8	9,6	8,4	2	1,5	2,4	0,2	0,6
Austria	12	2,9	2,8	2,5	2	0,3	0,2	.	.
Netherlands	12	72,0	75,4	80,9	2	12,8	11,3	0,7	1,4
<i>Other</i>	12	31,7	20,2	20,2	2	3,3	2,9	0,0	0,6
EU	12	288,7	276,5	264,2	2	44,9	43,8	2,1	3,7

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

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Graphs







MARKET INFORMATION

Prices & Margins

Please follow

https://ec.europa.eu/info/food-farming-fisheries/farming/facts-and-figures/markets/prices/price-monitoring-sector/animal-products/milk-and-dairy-products_en

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MARKET INFORMATION

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MARKET INFORMATION

Trade

Please follow

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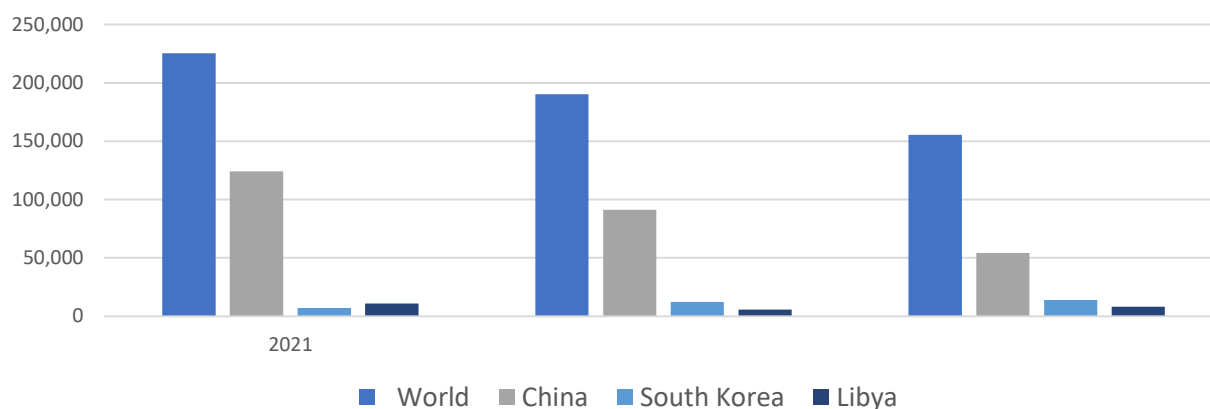
TRADE DATA MONITOR (TDM)

EU27 + UK Exports to World

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

Year to Date: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	225,433	190,306	155,520	100%	100%	100%	-18%
China	T	124,030	91,188	54,145	55%	48%	35%	-41%
South Korea	T	6,990	12,381	13,919	3%	7%	9%	12%
Libya	T	10,823	5,855	8,108	5%	3%	5%	38%

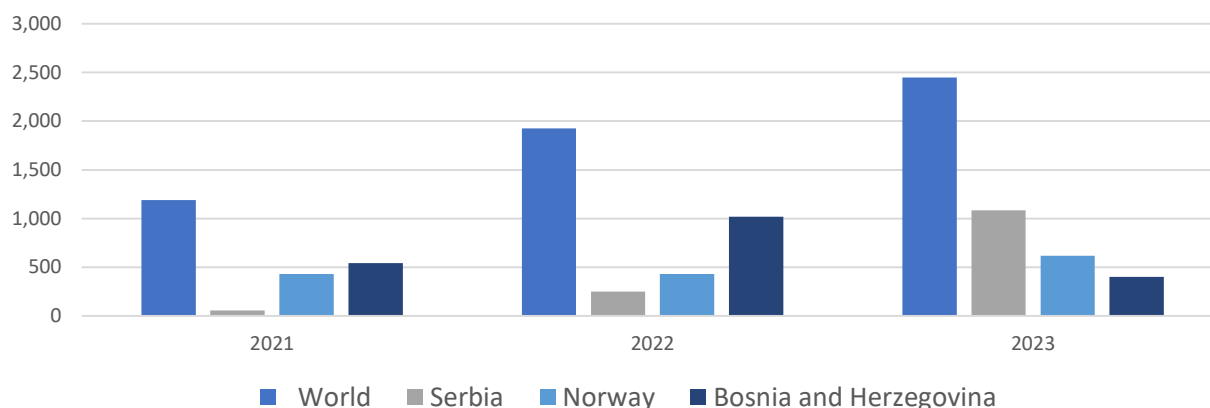


EU27 + UK Imports from World

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

Year to Date: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	1,192	1,926	2,447	100%	100%	100%	27%
Serbia	T	56	249	1,083	5%	13%	44%	335%
Norway	T	432	430	615	36%	22%	25%	43%
Bosnia and Herzegovina	T	543	1,021	400	46%	53%	16%	-61%

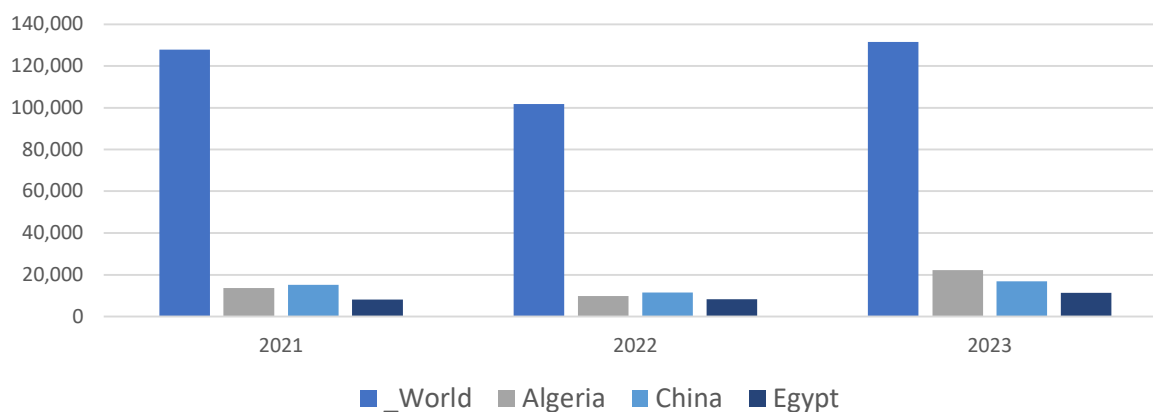


EU27 + UK Exports to World

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: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	127,920	101,770	131,498	100%	100%	100%	29%
Algeria	T	13,676	9,821	22,228	11%	10%	17%	126%
China	T	15,176	11,469	16,833	12%	11%	13%	47%
Egypt	T	8,089	8,241	11,320	6%	8%	9%	37%

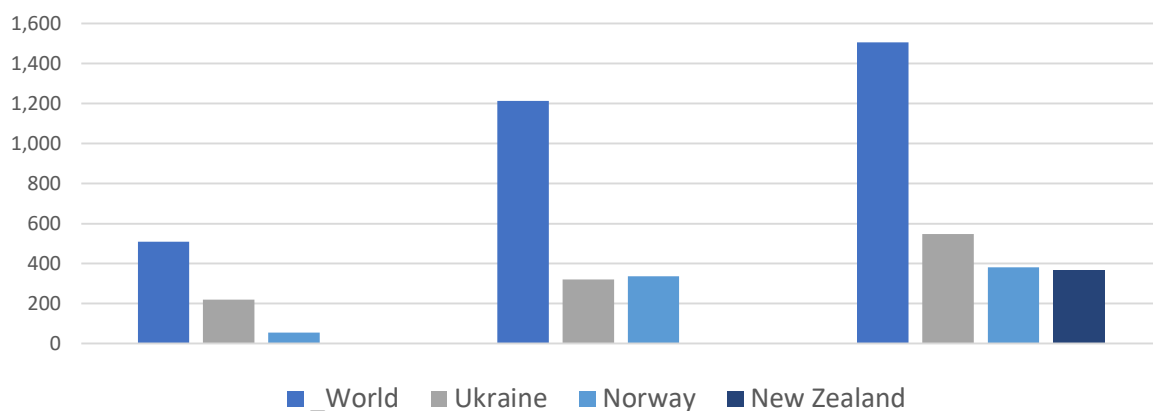


EU27 + UK Imports from World

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: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	509	1,213	1,507	100%	100%	100%	24%
Ukraine	T	220	320	548	43%	26%	36%	71%
Norway	T	55	336	382	11%	28%	25%	14%
New Zealand	T	0	0	369	0%	0%	24%	Calculation not possible

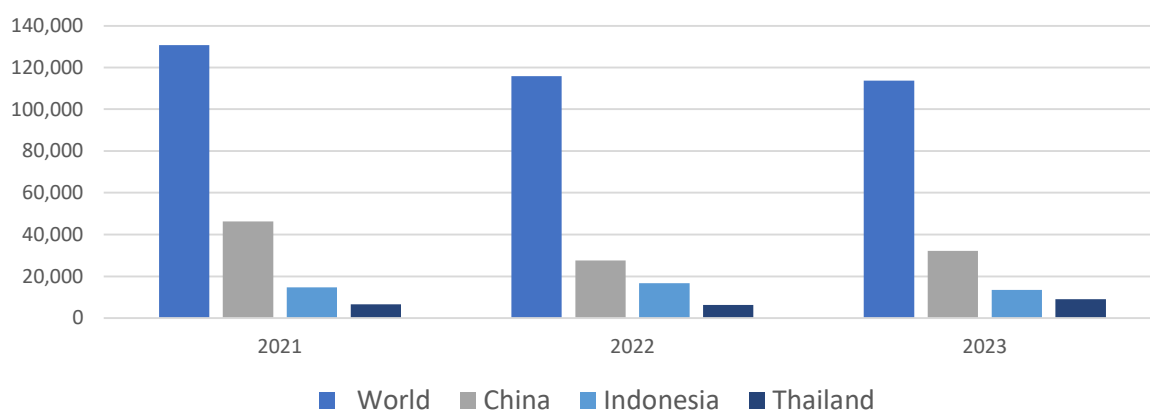


EU27 + UK Exports to World

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

Year to Date: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	130,827	115,821	113,779	100%	100%	100%	-2%
China	T	46,268	27,646	32,269	35%	24%	28%	17%
Indonesia	T	14,816	16,783	13,521	11%	14%	12%	-19%
Thailand	T	6,618	6,232	8,901	5%	5%	8%	43%

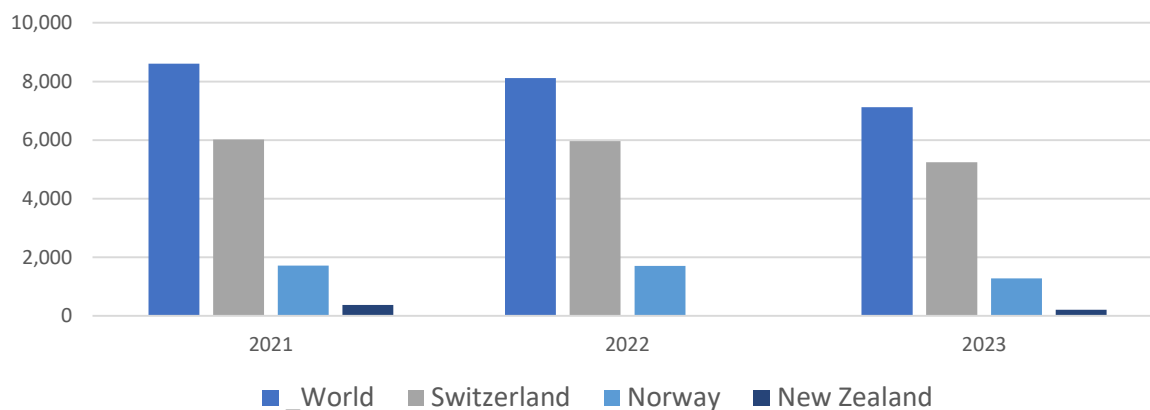


EU27 + UK Imports from World

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

Year to Date: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	8,599	8,113	7,126	100%	100%	100%	-12%
Switzerland	T	6,017	5,962	5,243	70%	73%	74%	-12%
Norway	T	1,714	1,700	1,271	20%	21%	18%	-25%
New Zealand	T	369	1	215	4%	0%	3%	21400%

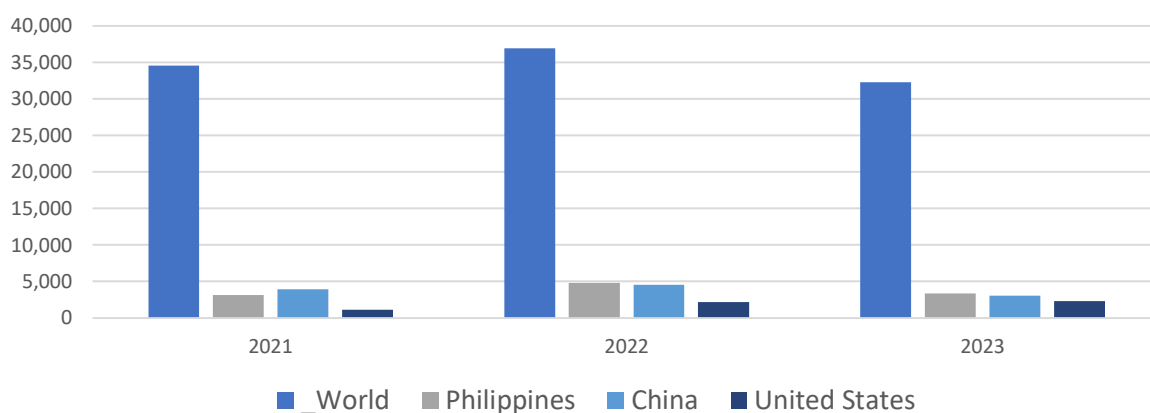


EU27 + UK Exports to World

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: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	34,542	36,938	32,263	100%	100%	100%	-13%
Philippines	T	3,173	4,830	3,384	9%	13%	10%	-30%
China	T	3,947	4,524	3,043	11%	12%	9%	-33%
United States	T	1,160	2,207	2,315	3%	6%	7%	5%

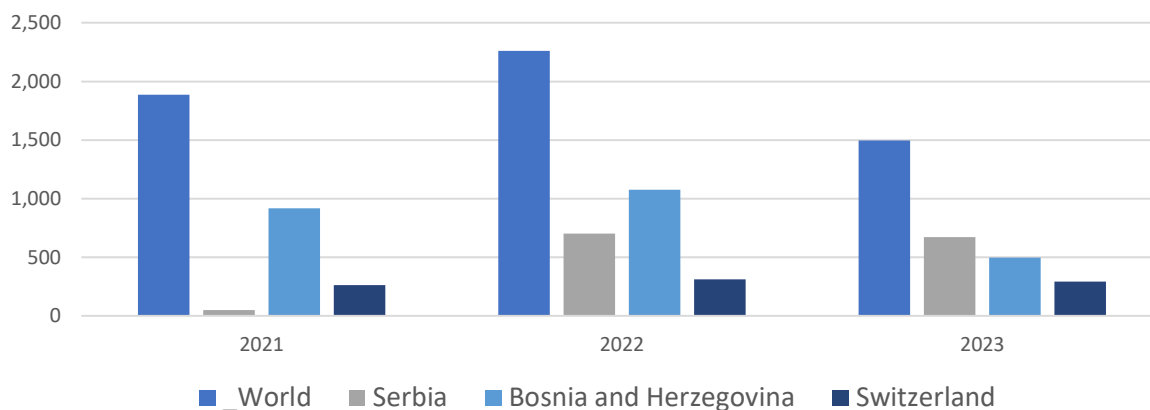


EU27 + UK Imports from World

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: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	1,886	2,260	1,497	100%	100%	100%	-34%
Serbia	T	47	701	671	2%	31%	45%	-4%
Bosnia and Herzegovina	T	918	1,074	496	49%	48%	33%	-54%
Switzerland	T	262	311	291	14%	14%	19%	-6%

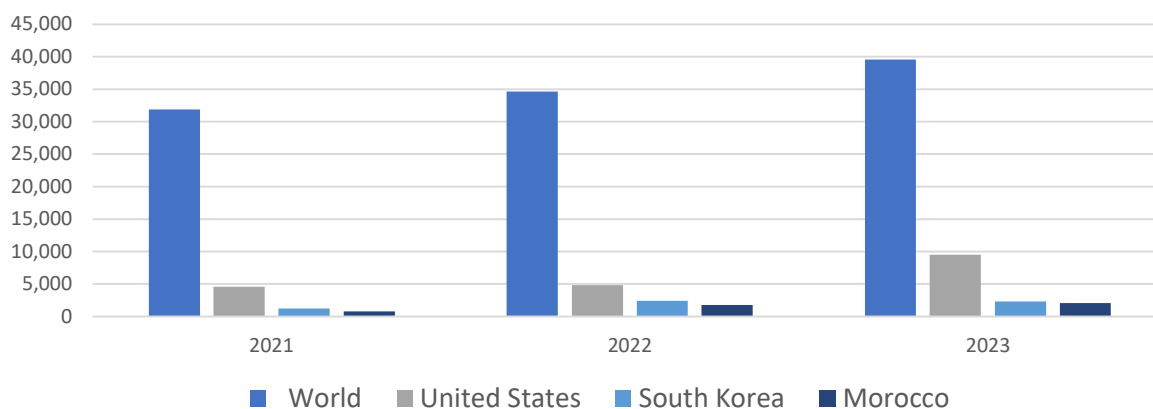


EU27 + UK Exports to World

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

Year to Date: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	31,851	34,605	39,567	100%	100%	100%	14%
United States	T	4,581	4,843	9,489	14%	14%	24%	96%
South Korea	T	1,207	2,395	2,286	4%	7%	6%	-5%
Morocco	T	811	1,742	2,057	3%	5%	5%	18%

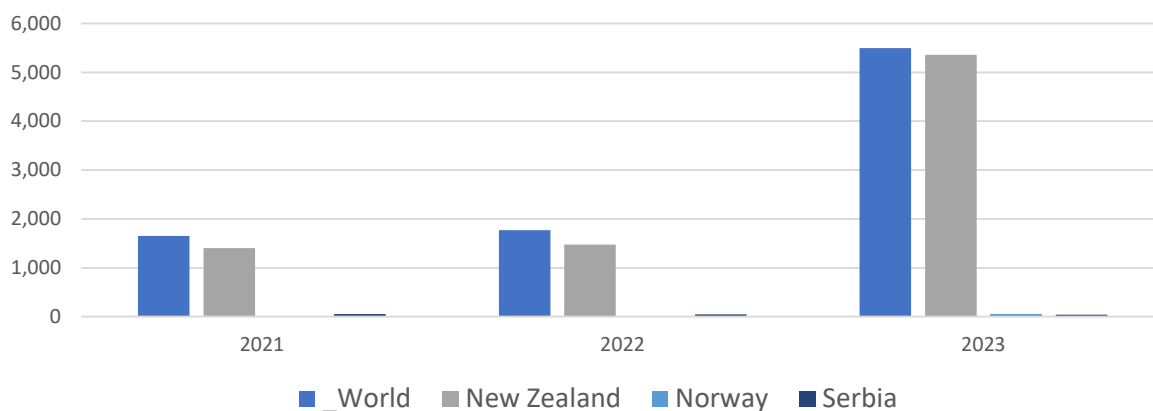


EU27 + UK Imports from World

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

Year to Date: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	1,649	1,768	5,494	100%	100%	100%	211%
New Zealand	T	1,400	1,475	5,356	85%	83%	97%	263%
Norway	T	0	0	59	0%	0%	1%	Calculation not possible
Serbia	T	50	43	36	3%	2%	1%	-16%

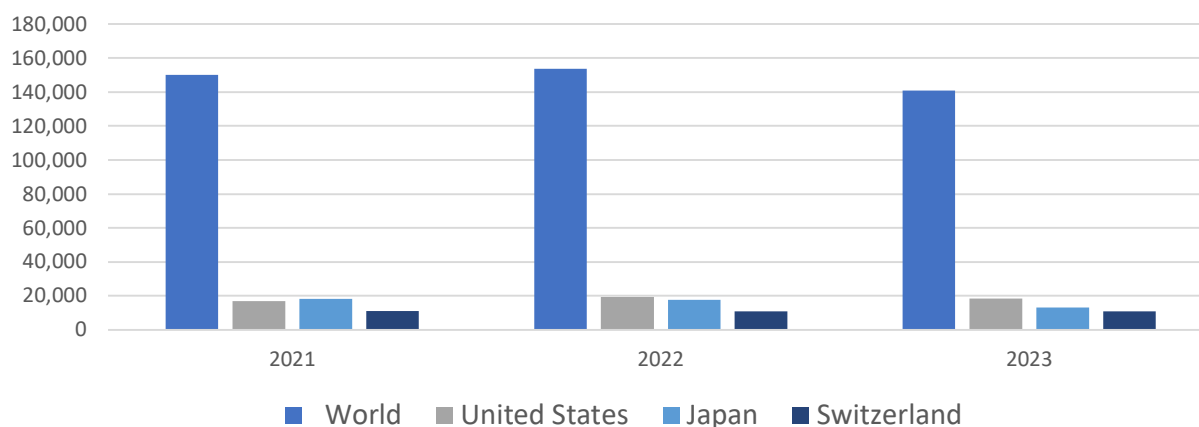


EU27 + UK Exports to World

Commodity: 0406, Cheese and Curd (in tonnes)

Year to Date: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	150,145	153,796	140,908	100%	100%	100%	-8%
United States	T	16,927	19,248	18,368	11%	13%	13%	-5%
Japan	T	18,191	17,695	13,214	12%	12%	9%	-25%
Switzerland	T	11,076	10,732	10,836	7%	7%	8%	1%

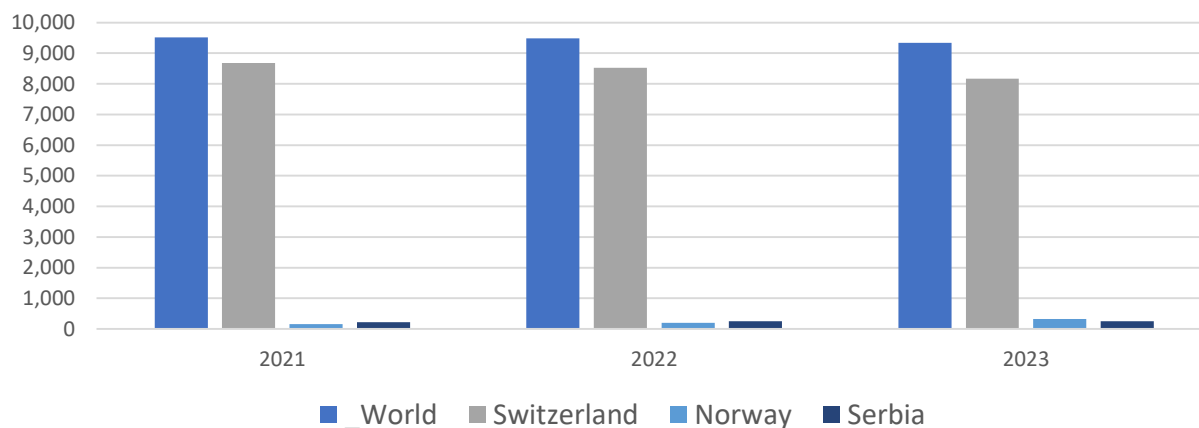


EU27 + UK Imports from World

Commodity: 0406, Cheese and Curd (in tonnes)

Year to Date: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	9,521	9,486	9,346	100%	100%	100%	-1%
Switzerland	T	8,683	8,526	8,176	91%	90%	87%	-4%
Norway	T	162	204	330	2%	2%	4%	62%
Serbia	T	216	247	250	2%	3%	3%	1%

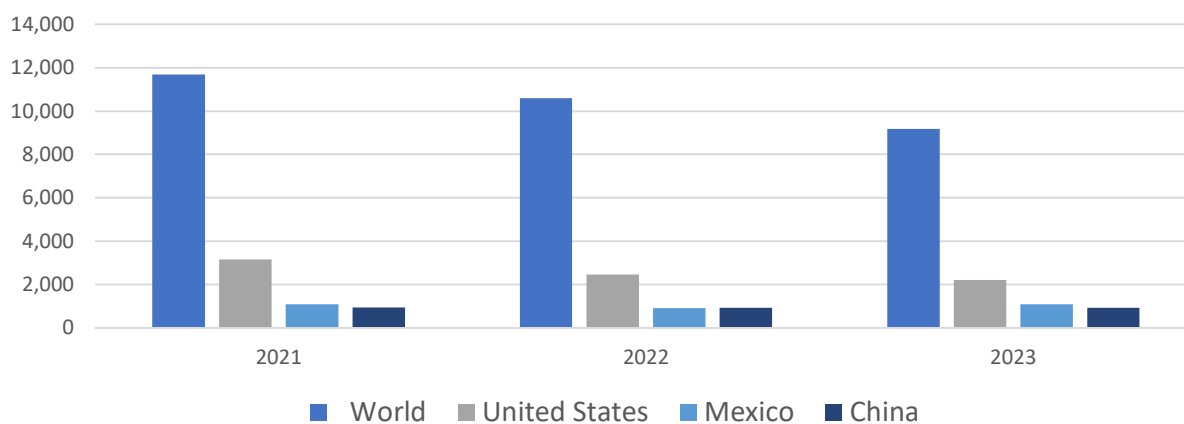


EU27 + UK Exports to World

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

Year to Date: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	11,696	10,599	9,186	100%	100%	100%	-13%
United States	T	3,147	2,459	2,208	27%	23%	24%	-10%
Mexico	T	1,083	901	1,085	9%	9%	12%	20%
China	T	942	926	925	8%	9%	10%	0%

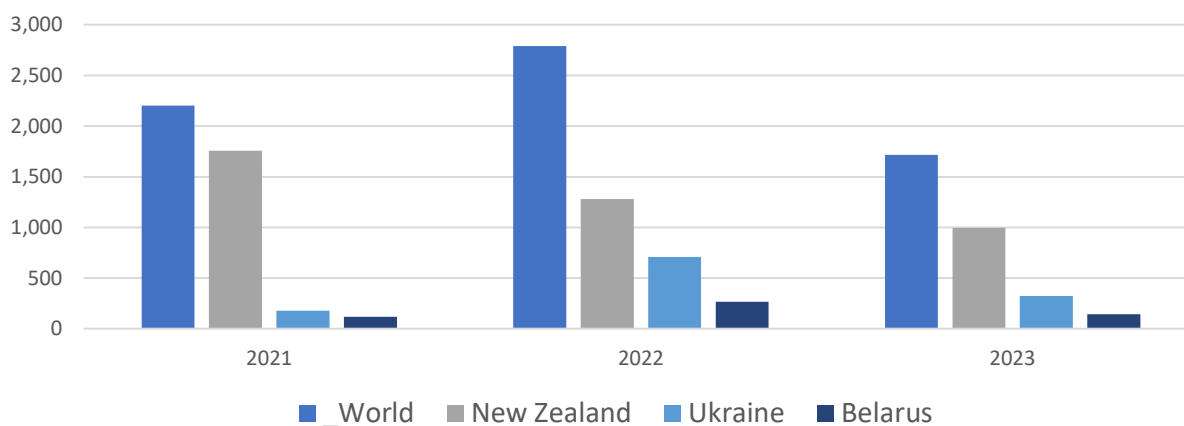


EU27 + UK Imports from World

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

Year to Date: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	2,204	2,788	1,714	100%	100%	100%	-39%
New Zealand	T	1,756	1,280	996	80%	46%	58%	-22%
Ukraine	T	180	710	324	8%	25%	19%	-54%
Belarus	T	120	265	142	5%	10%	8%	-46%

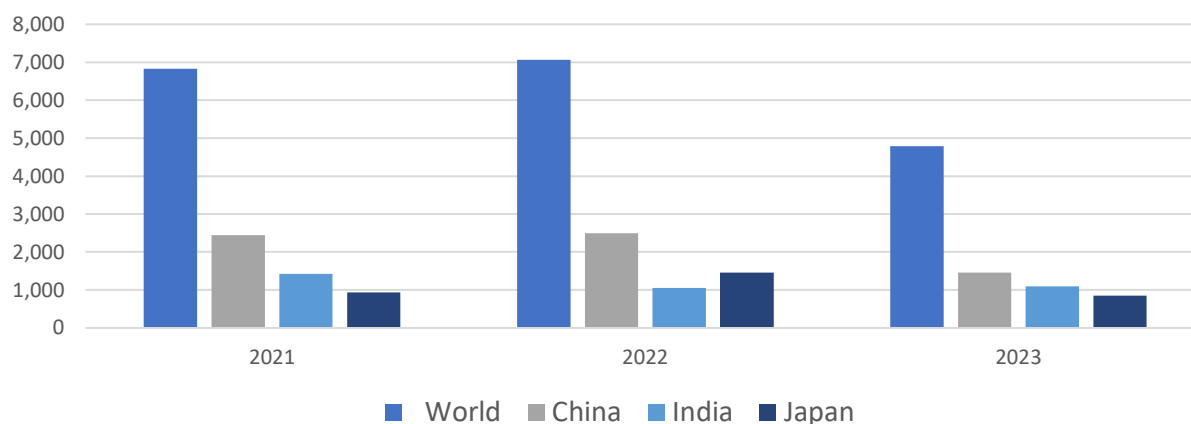


EU27 + UK Exports to World

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

Year to Date: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	6,825	7,067	4,792	100%	100%	100%	-32%
China	T	2,441	2,489	1,457	36%	35%	30%	-41%
India	T	1,421	1,048	1,097	21%	15%	23%	5%
Japan	T	935	1,455	849	14%	21%	18%	-42%

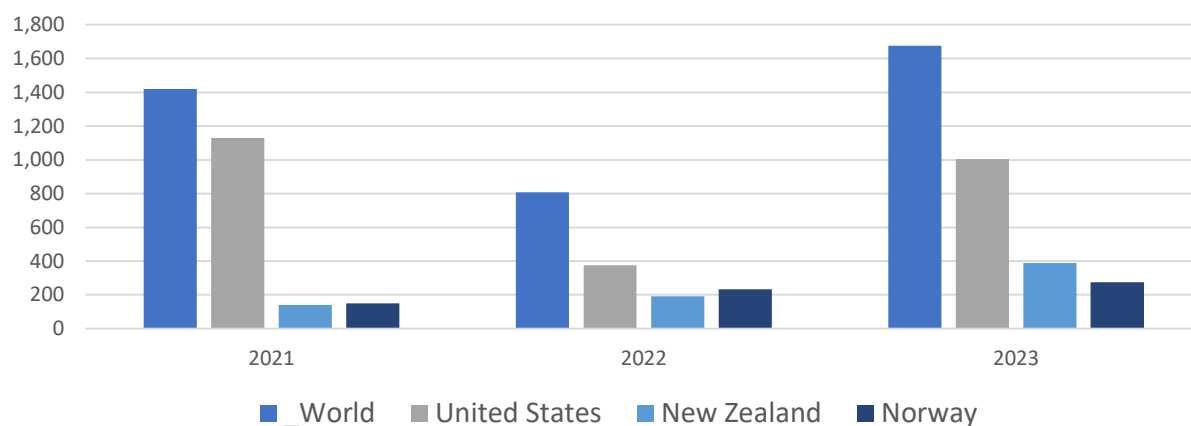


EU27 + UK Imports from World

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

Year to Date: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	1,420	807	1,675	100%	100%	100%	108%
United States	T	1,129	376	1,006	80%	47%	60%	168%
New Zealand	T	141	191	390	10%	24%	23%	104%
Norway	T	150	233	277	11%	29%	17%	19%

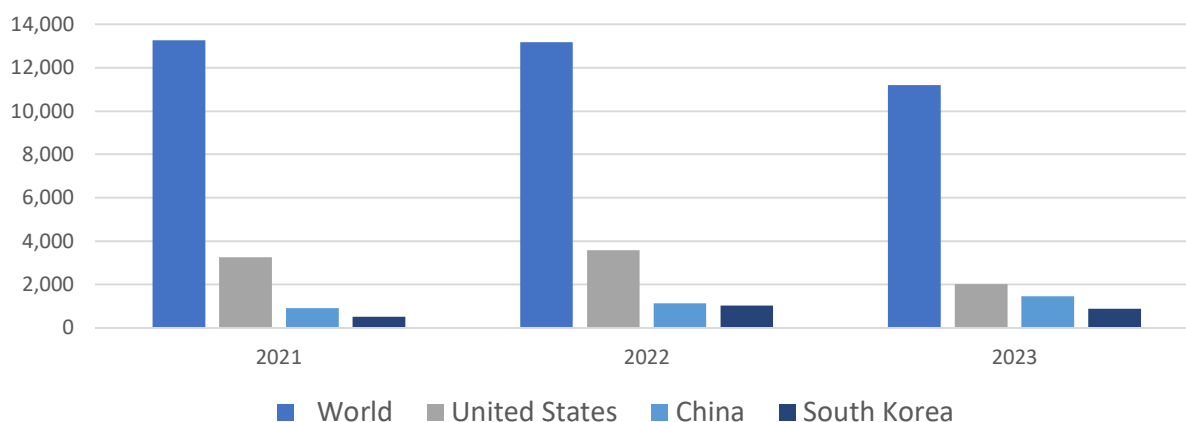


EU27 + UK Exports to World

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

Year to Date: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	13,264	13,181	11,210	100%	100%	100%	-15%
United States	T	3,259	3,582	2,011	25%	27%	18%	-44%
China	T	913	1,125	1,451	7%	9%	13%	29%
South Korea	T	520	1,035	885	4%	8%	8%	-14%

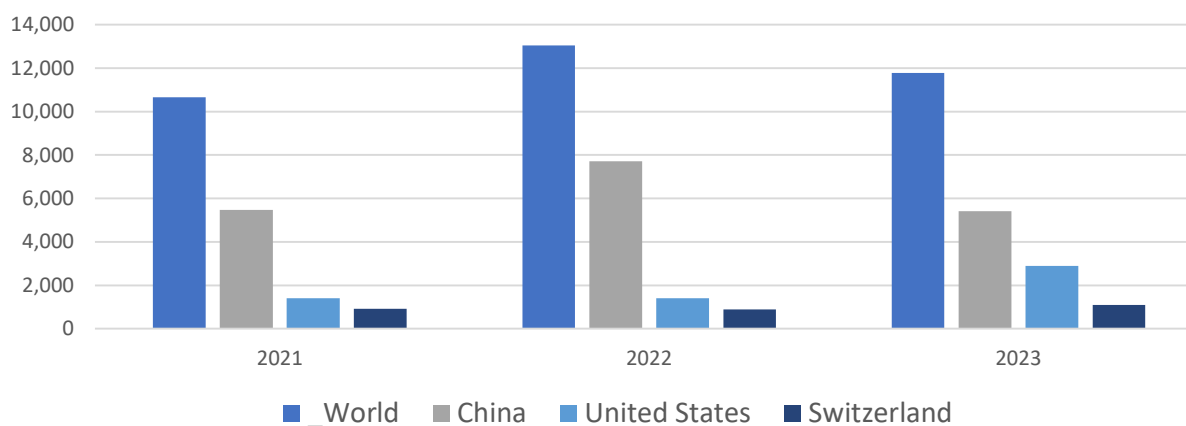


EU27 + UK Imports from World

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

Year to Date: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	10,661	13,047	11,776	100%	100%	100%	-10%
China	T	5,469	7,714	5,411	51%	59%	46%	-30%
United States	T	1,409	1,406	2,892	13%	11%	25%	106%
Switzerland	T	923	885	1,099	9%	7%	9%	24%

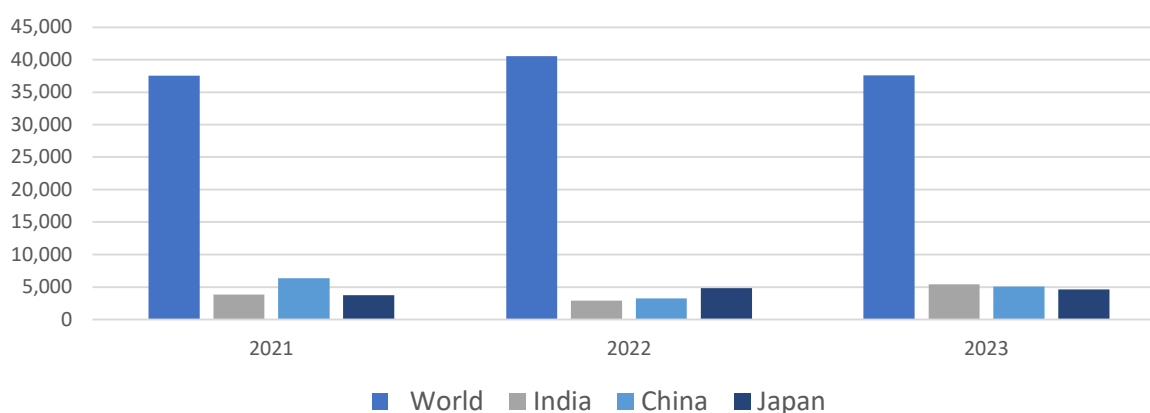


EU27 + UK Exports to World

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: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	37,543	40,591	37,574	100%	100%	100%	-7%
India	T	3,862	2,922	5,390	10%	7%	14%	84%
China	T	6,341	3,271	5,084	17%	8%	14%	55%
Japan	T	3,724	4,791	4,615	10%	12%	12%	-4%

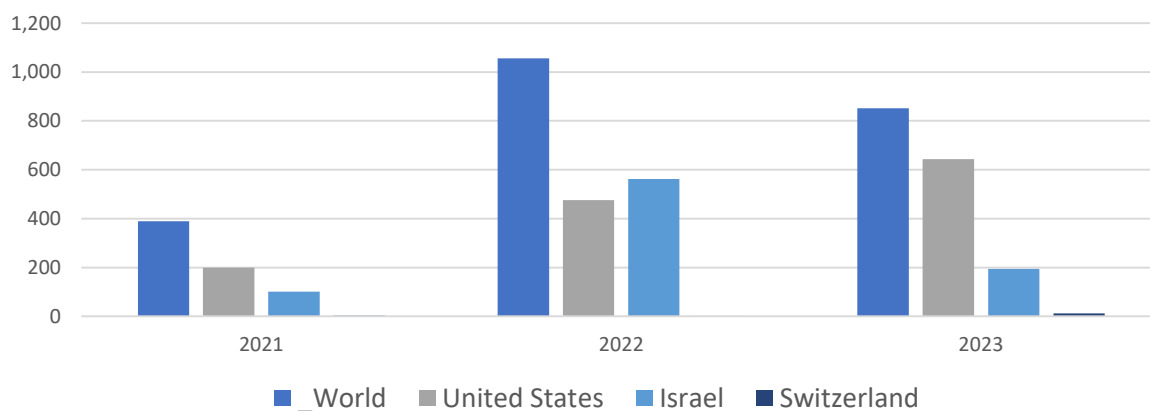


EU27 + UK Imports from World

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: February, 2021 - 2023

Partner		2021	2022	2023	2021	2022	2023	%Δ 2023/22
_World	T	389	1,057	852	100%	100%	100%	-19%
United States	T	199	476	643	51%	45%	75%	35%
Israel	T	100	562	194	26%	53%	23%	-65%
Switzerland	T	3	2	11	1%	0%	1%	450%



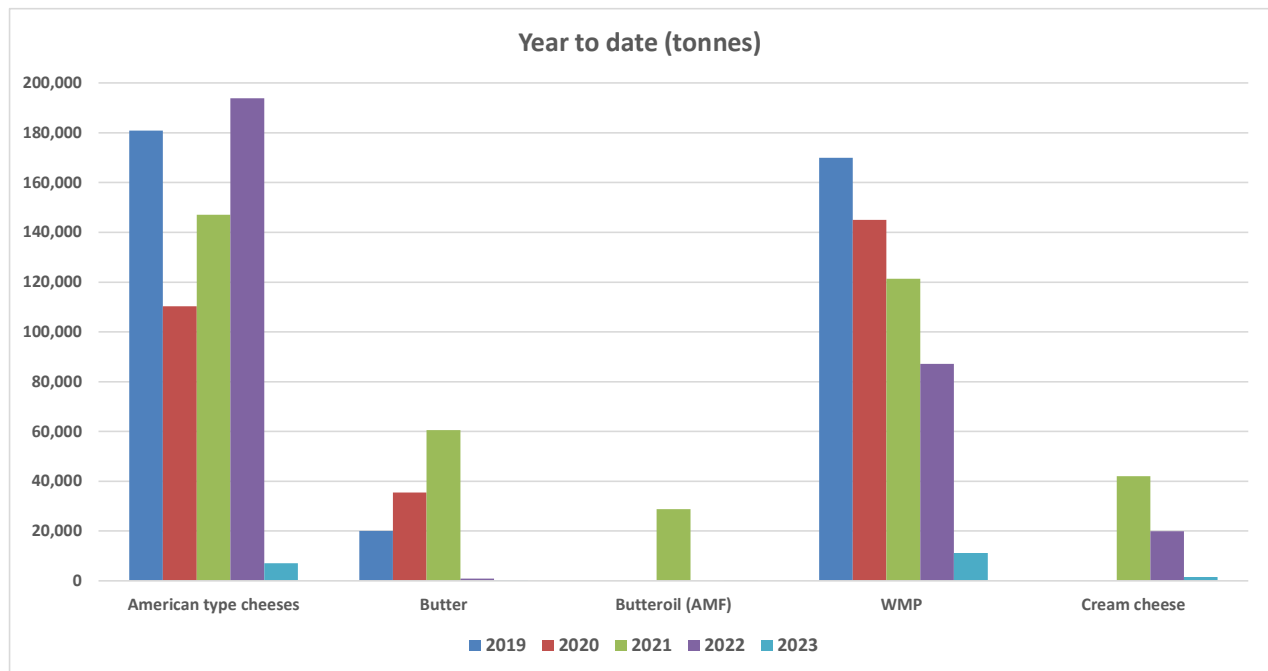


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CWT EXPORT SUBSIDIES

CWT exports subsidies - Last update: May 8, 2023

YEAR to date (tonnes)	2019	2020	2021	2022	2023
American type cheeses	180,929	110,232	147,038	193,865	7,121
Butter	20,161	35,552	60,520	953	225
Butteroil (AMF)	0	0	28,757	0	1
WMP	169,934	145,100	121,305	87,135	11,158
Cream cheese	0	0	41,998	19,913	1,542





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IMPORTANT UPCOMING EVENTS

Important upcoming events 2023

Date	Event	Jurisdiction
2023 Jan - Jun	Swedish Presidency	EU
2023 Jul - Dec	Spanish Presidency	EU
2023 Oct	Anuga, Cologne, October 7 - 11, 2023	Global
2023 Oct	IDF World Dairy Summit, Chicago, October 16 – 19, 2023	Global
2023 Nov	EDA Annual Convention, Brussels, November 7 - 8, 2023	EU
2023 Nov	FIE (Food Ingredients Europe), Frankfurt, November 28 - 30, 2023	EU



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- ANNEX -

EDA Individual Market Surveys

MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 24 MAY 2023

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-Mar 2023 / Jan-Mar 2022	What are your expectations for deliveries in Q2/23 compared to Q2/22?	What are your expectations for deliveries in Q3/23 compared to Q3/22?
- 0.3 % (to dairies in Austria)	(deliveries)	(deliveries)
Milk price evolution		What are your expectations for prices in Q2/23 compared to Q2/22?
Current milk price: 54.81 (milk with 4.0 % fat, 3.4 % protein all qualities, ex farm, without tax)	March 23 / March 22: + 26.7 %	(prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Feb 2023/ Jan-Feb 2022	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Expectations Q3/23 compared to Q3/22 (+ / - / stable)	April 23 / April 22	Expectations Q3/23 compared to Q2/23 (+ / - / stable)	(Including stocks, consumption, etc.)
SMP	- 0.7 %			- 40 %		
WMP	- 8.3 %			- 30 %		
CHEESE	+ 1.5 %			0 to + 15 %		
BUTTER	+ 2.4 %			- 15 %		
WHEY	+ 4.9 %			- 50 %		



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2023 – April 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Austrian milk deliveries stagnated in the first quarter of 2023 at the previous year's level (-0.3%). The organic share was 18.4% and declined slightly. The value of Austria's dairy exports in 2022 was 26.2% higher than in the previous year, while imports increased by 27.2%. Overall, there was a positive foreign trade balance of € 640 million. The increase in values can be explained primarily by the increased prices.

Overall inflation in Austria in March 2023 was 9.2%. For food it was 14.6%, for "milk, butter and eggs" it was 20.7%. In the case of butter, consumer prices have already fallen significantly and were only 0.5% above the value of March 2022. Unfortunately, there is currently a political discussion about the price increase. Energy and other costs remain high and wages and salaries have risen significantly. Farm milk prices have already fallen and milk suppliers are coming under pressure. The proportion of (cheaper) private labels has increased and higher-priced products are suffering.

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2023)**

Expected evolution in milk supply (+/-?):
Production trends for main products:
Consumption trends:
Exports (+/- and why?):
Latest developments of the National Organic market:

➔ **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 24 MAY 2023

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-Mar 2023 / Jan-Mar 2022	What are your expectations for deliveries in Q2/23 compared to Q2/22?	What are your expectations for deliveries in Q3/23 compared to Q3/22?
+4,0%	+ (deliveries)	- (deliveries)
Milk price evolution		What are your expectations for prices in Q2/23 compared to Q2/22?
Current milk price: €45,67 / 100kg	March 23 / March 22: -5%	- (prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc.)
	2022/2021	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Expectations Q3/23 compared to Q3/22 (+ / - / stable)	April 23 / April 22 (week 14 – 17)	Expectations Q3/23 compared to Q2/23 (+ / - / stable)	
SMP	+27%			-62%		
WMP	-20%			-54%		
CHEESE	-43% (Cheddar) +7% (Mozza)			%		
BUTTER	+9%			-53%		
WHEY	%			%		



- **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2023 – April 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

- **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

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- **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2023)**

Expected evolution in milk supply (+/-?):
Production trends for main products:
Consumption trends:
Exports (+/- and why?):
Latest developments of the National Organic market:

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

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- **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:

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MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 24 MAY 2023

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-Mar 2023 / Jan-Mar 2022	What are your expectations for deliveries in Q2/23 compared to Q2/22?	What are your expectations for deliveries in Q3/23 compared to Q3/22?
+ 0,1 %	stable (deliveries)	Moderate decrease (deliveries)
Milk price evolution		What are your expectations for prices in Q2/23 compared to Q2/22?
Current milk price: 49,90 ct/kg	March 23 / March 22: +25 %	App. stable price (prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc.)
	Jan-March 2023/ Jan-March 2022	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Expectations Q3/23 compared to Q3/22 (+ / - / stable)	April 23 / April 22	Expectations Q3/23 compared to Q2/23 (+ / - / stable)	
SMP	+ 8,4 %	+	+	-30,6 %	Stable	
WMP	-15,8 %	+	+	+ 4,1 %	-	
CHEESE	Natural +4,0 % Processed + 1,4 %	stable	stable	Edam 30 -14,1% Edam 40 +0,1 %	-	
BUTTER	-13,3 %	+	stable	250g -11,1 % Block +8 %	-	
WHEY	Powder -14,0 % Evaporated + 8,2 %	+	stable	Powder -44,3 %	stable	

➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2023 – April 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Development of other dairy products for period **1Q 2023 to 1Q 2022**
Moderate increase in some consumer products, dairy spread excluded

- Liquid milk: + 2,1 %, from that fresh milk + 2,6 %, UHT + 2,5 %
- Cream: +0,2 %
- Yoghurt: - 0,7 %; other fermented milk products + 3,7 %
- Dairy spreads: - 13,3 %
- Curd: + 7,3 %

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

Since the beginning of the year, there has been a gradual reduction in the price of raw milk by approximately 4-5% per month, however this current decline appears to be slower than in neighbouring countries (DE, PL). Farmers are very dissatisfied with this development and are pushing for the current price to be maintained or at least for a slower downward trend. This situation causes them to be demotivated and some of them announce the termination of their business, however, the supply of milk is still quite balanced compared to the previous period.

The drop in raw material prices further "motivates" the trade, which demands a reduction in the prices of dairy products from the operators, but these do not change significantly in view of the currently high-cost inputs (mainly energy, packaging and the price of labour). The only exception is the drop in prices for butter, liquid milk and regular (table) cheeses. The situation affects the production of products with higher added value, and thus mainly cheaper and less valuable private brands come to the fore.

The consumption of dairy products experienced a year-on-year decrease of 16 kg in ME value per person, which is more than the average decline in the EU (only 5 kg in ME per capita) and is related to the reduced purchasing power of the population.

The assumption of a reduction in the prices of consumer products is, up to the period from the 3rd quarter, mainly related to the reduced price of raw milk.

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2023)**

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

A more or less stable situation in milk supplies is expected in the medium term, but a drop in supplies may occur later due to the expected drop in prices and less motivation of farmers.

Production trends for main products:

With regard to the lower purchasing power and high prices of dairy products, there may be a reduction in total dairy production, to a greater extent in the case of products with a higher added value and therefore



a higher price. However, there will certainly not be a reduction in basic dairy products (drinking milk, curd, yogurts), in the case of butter, fluctuations in sales will always be short-lived.

Consumption trends:

With regard to the above, it is possible to expect a reduction in the consumption of dairy products, at least in the first half of the year.

Exports (+/- and why?):

more or less stable situation is expected so far.

Latest developments of the National Organic market:

Due to high product prices and lower purchasing power, the demand for organic products has decreased. Also, the price difference of farm organic milk compared to ordinary conventional milk has decreased significantly and represents maximal 4-5 %.

However, it should be noted that the total sales of organic dairy products are not very high in the Czech Republic



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:

The situation remains unchanged, a large number of immigrants from Ukraine still live in the Czech Republic (approx. 400,000) and there are no other effects of the war conflict on the economy other than those that have been there since last year.

MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 24 MAY 2023

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-Mar 2023 / Jan-Mar 2022	What are your expectations for deliveries in Q2/23 compared to Q2/22?	What are your expectations for deliveries in Q3/23 compared to Q3/22?
+0.6%	0-2% (deliveries)	0-2% (deliveries)
Milk price evolution		What are your expectations for prices in Q2/23 compared to Q2/22?
Current milk price: 44 EUR/100kg	March 23 / March 22: +16%	-10%- -20% (prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc.)
	Jan-Feb 2023/ Jan-Feb 2022	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Expectations Q3/23 compared to Q3/22 (+ / - / stable)	April 23 / April 22	Expectations Q3/23 compared to Q2/23 (+ / - / stable)	
SMP	+2%%			%		
WMP	-40%%			%		
CHEESE	+10%			%		
BUTTER	+20%%			%		
WHEY	%			%		



- **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2023 – April 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

- **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

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- **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2023)**

Expected evolution in milk supply (+/-?):
Production trends for main products:
Consumption trends:
Exports (+/- and why?):
Latest developments of the National Organic market:

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

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- **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:

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MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 24 MAY 2023

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

DELIVERIES	COMMENT	
Jan-Mar 2023 / Jan-Mar 2022	What are your expectations for deliveries in Q2/23 compared to Q2/22?	What are your expectations for deliveries in Q3/23 compared to Q3/22?
540,4 m litres / 527,3 m litres	Declining (deliveries)	Declining (deliveries)
Milk price evolution		What are your expectations for prices in Q2/23 compared to Q2/22?
Current milk price: 55,1 cnt/kg Feb 2023	Feb 23 / Feb 22: +12,9 cnt/kg	Slightly declining (prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Feb 2023/ Jan-Feb 2022	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Expectations Q3/23 compared to Q3/22 (+ / - / stable)	April 23 / April 22	Expectations Q3/23 compared to Q2/23 (+ / - / stable)	(Including stocks, consumption, etc.)
SMP	N/A			%		
WMP	N/A			%		
CHEESE	-0,3%	stable		%		
BUTTER	-0,9%	stable		%		
WHEY	N/A			%		



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2023 – April 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

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➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2023)**

Expected evolution in milk supply (+/-?):	-
Production trends for main products:	-
Consumption trends:	
Exports (+/- and why?):	?
Latest developments of the National Organic market:	

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

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➔ **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:

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MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 24 MAY 2023

Delegation: France

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

➤ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-Feb 2023 / Jan-Mar 2022	What are your expectations for deliveries in Q2/23 compared to Q2/22?	What are your expectations for deliveries in Q3/23 compared to Q3/22?
-1,2%	- 2% (deliveries)	-2% (deliveries)
Milk price evolution		What are your expectations for prices in Q2/23 compared to Q2/22?
Current milk price: 500 €/100litres	March 23 / March 22:	down (prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Feb 2023/ Jan-Feb 2022	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Expectations Q3/23 compared to Q3/22 (+ / - / stable)	April 23 / April 22	Expectations Q3/23 compared to Q2/23 (+ / - / stable)	(Including stocks, consumption, etc.)
SMP	- 4,8%	-	-	- 44%	-	
WMP	+ 1,9%	stable	Stable	-45%	-	
CHEESE	0,1%	Stable	Stable			
BUTTER	5%	down	Down	-33%	-	
WHEY	- 16,5%	down	down	-53%	-	



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2023 – April 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

French production is down with the greatest decrease of the cattle because farms choose to stop the milk production.

Negotiations with retailers end up with a 15% increase in dairy prices in March the 1st.

Retailers ask for a reopening of the negotiation to fight against inflation, processors are not ok.

French dairy prices went up to 20% within one year. Dairy consumption is down -2%.

Drought is already worrying for the next summer.

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

National production is expected to stay down compared to last year during all the year.

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2023)**

Expected evolution in milk supply (+/-?): -
Production trends for main products: down with less milk
Consumption trends: down due to inflation
Exports (+/- and why?): down with less supply
Latest developments of the National Organic market: price down, production is still increasing.

➔ **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 24 MAY 2023

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-Mar 2023 / Jan-Mar 2022	What are your expectations for deliveries in Q2/23 compared to Q2/22?	What are your expectations for deliveries in Q3/23 compared to Q3/22?
+2,7 %	Slight increase (deliveries)	decrease (deliveries)
Milk price evolution		What are your expectations for prices in Q2/23 compared to Q2/22?
Current milk price: 47,9	March 23 / March 22: +7,6 %	- (prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Mar 2023/ Jan-Mar 2022	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Expectations Q3/23 compared to Q3/22 (+ / - / stable)	April 23 / April 22	Expectations Q3/23 compared to Q2/23 (+ / - / stable)	(Including stocks, consumption, etc.)
SMP	+16,4%	+	-	-47,5%	stable	
WMP	-3,9%	-	-	-36,5%	+	
CHEESE	-1,6%	-	stable	-28,5%	stable	
BUTTER	+8,0%	+	-	-35,6%	+	
WHEY	+5,2%	-	+	-58,5%	+	



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2023 – April 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

More milk available in dairies. Cheese production reduced compared with 2022, more milk processed into butter + SMP. Retail sales decreased compared to 2022 due to high inflation rates, only butter sales stable. Cold spring dampened demand for fresh dairy products and ice-cream. Supply chain problems relaxed.

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2023)**

Expected evolution in milk supply (+/-?):-
Production trends for main products: cheese production will recover to a certain extent
Consumption trends: price-reductions could help consumption, but consumers will still look for the cheaper choice
Exports (+/- and why?): ? demand could suffer from weak global economy

Latest developments of the National Organic market: sales are higher than 2019, but lower than in 2020 and 2021. Organic deliveries are increasing in Germany.

➔ **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:

Energy prices had the biggest impact and are more normal again. Further impacts on feed prices uncertain.



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 24 MAY 2023

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-Mar 2023 / Jan-Mar 2022	What are your expectations for deliveries in Q2/23 compared to Q2/22?	What are your expectations for deliveries in Q3/23 compared to Q3/22?
-1.8%	Stable (deliveries)	Stable (deliveries)
Milk price evolution		What are your expectations for prices in Q2/23 compared to Q2/22?
Current milk price: 46c/L in EU Solids	March 23 / March 22 : Roughly the same	Continued downward pressure over next quarter (prices)



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	2021	million	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	litres	183.3	367.5	808.6	1054.6	1166.0	1057.6	1022.8	919.0	785.6	692.2	484.9	282.7	8824.7
	2023		180.4	381.0 ¹	793.8										
Fat content	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	4.04	3.95	4.00	4.03	4.21	4.56	4.84	4.98	4.85	4.28
	2023		4.50	4.46	4.34										
Protein content	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	3.44	3.45	3.47	3.47	3.53	3.75	3.98	3.90	3.76	3.55
	2023		3.50	3.50	3.31										
Total milk sold for human consumption ²	2021	million	40.4	38.3	42.1	42.9	46.6	44.7	45.2	44.8	41.7	41.8	40.1	39.7	506.4
	2022	litres	40.8	37.9	43.2	43.3	46.4	43.1	42.5	43.1	41.5	41.6	40.0	39.8	503.2
	2023		40.4	36.6 ³	43.0 ³										
of which: Whole milk sales	2021	million	25.1	22.4	26.5	27.7	30.8	29.7	30.2	29.0	26.6	25.9	24.6	24.5	323.1
	2022	litres	25.0	23.7	27.4	28.2	30.9	28.4	27.8	27.6	26.4	26.2	25.1	24.9	321.6
	2023		24.8	22.5 ³	27.1 ³										
Skimmed & semi- skimmed milk sales	2021	million	15.3	13.9	15.6	15.2	15.8	15.0	15.1	15.8	15.1	15.9	15.5	15.2	183.3
	2022	litres	15.8	14.3	15.8	15.0	15.5	14.6	14.7	15.5	15.1	15.4	14.9	14.9	181.6
	2023		15.6	14.2 ³	15.9 ³										
Butter	2021	'000	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	tonnes	6.7	11.6	24.4	29.6	32.0	29.1	29.3	28.6	23.7	21.6	18.2	14.4	269.2
	2023		6.2	11.7 ¹	20.8										
Skimmed milk powder	2021	'000	*	*	11.4	17.7	27.7	19.3	17.1	16.4	11.1	5.5	*	7.4	147.7
	2022	tonnes	5.2	3.4	9.7	21.7	28.3	26.2	22.1	16.9	13.2	*	*	10.5	173.7
	2023		5.9 ¹	*	10.3										
Cheese	2020	'000	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	tonnes	2.5	13.1	31.9	30.2	32.5	35.8	29.7	28.8	31.0	26.0	18.9	6.7	287.0
	2022		2.9 ³	11.9 ³	28.5 ³	28.9 ³	31.3 ³	34.9 ³	27.6 ³	29.8 ³	33.6 ³	27.1 ³	18.6 ³	7.2 ³	282.5 ³

NATIONAL DAIRY MARKET DEVELOPMENTS: January 2023 – April 2023 (e.g. industrial developments, domestic policy changes, external factors, exports)

- Continued downward pressure on farmgate prices with reductions of 16c a litre from record highs since the start of the year. More declines in pricing are expected in May price offerings as dairy commodity pricing is running over 40% below September 2022 peaks.
- Uncomfortable period as cost of production now rapidly catching up with milk price meaning farmers are feeling squeeze in Ireland, with input costs not yet fully tracking output cost reductions.



- Albeit Teagasc figures showing Irish farmers had an exceptional 2022 with very high profit figures per average farms.
- Focus now on the announcement by the British government of the imposition for a Target Operating Model in the Autumn regarding certification for goods traveling into Britain.
- The Irish Protocol continues to be working exceptionally well for dairy across the island. The addition of the ‘Windsor’ agreement is very welcome, and we hope will be accepted by all parities to protect the all island dairy economy and also help with the overall improvement of EU/Britain relations.
- Energy issues, though costs are slowly declining continue to be a worry for Irish Dairy processing. Issues around cost and margin destruction because of energy and other business costs.
- Irish Nitrates derogation continues to be a key policy area in Irish dairy. Proposed new rules are causing friction in Irish land market with dairies looking for more land. Scientific impact assessment studies now with government and EU showing tampering with derogation will have great financial consequences while also not improving Irish water quality levels which are at a relatively high base.

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

- Despite some excellent results recently for Irish Dairy companies and Irish farmers- Difficult time for milk prices being signalled by companies, coops and futures markets. Hope that input costs also go down to help both company and farmer margins.
- Hoping that markets and demand find a floor at coming into Q4 and that a ‘new normal’ in global dairy pricing is found.
- Nitrates and other Environmental Regulatory uncertainty and high input costs are expected to keep Irish milk supply relatively stable in short term.
- Government, Industry and Farmers continue to move to implement strongly a range of national and local environmental initiatives to drive sustainability metrics.

➔ NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2023)

Expected evolution in milk supply (+/-?): Stable Production trends for main products:

- Continued growth in non-cheddar types of cheeses in response to Brexit and diminishing reliance on British market.
- Continued growth in SN powders for functional food applications.
- Demographic change in China moving us away from that market to more developing economies.
- Significant IF export growth to US on the back of 2022 domestic difficulties.
- Irish branded butter still continues to do well internationally.

Consumption trends:

- Recent price cuts in liquid milk and butter have garnered significant media attention in Ireland. Not really hugely significant for the overall industry because of the dominance of exports to the Irish model.
- Consumption trends have held up reasonably well across all categories in Ireland- despite recent price inflation.
- A lot of plant based campaigns, while a small segment of the market, v visible and worrying trends in consumption for young females particularly.

Exports (+/- and why?):

In volume terms relatively stable, but recent price reductions will reduce the monetary value of exports.

Latest developments of the National Organic market:

- New Organic scheme in Ireland has not seen any significant uptake from dairy farmers.
- Inflation has put the consumer organic category under pressure as consumers ditch organic to try and combat cost of living.



➔ ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION

- Focus needs to be redoubled on encouraging positive sustainable food production and food security in EU both for the internal market and the wider world.
- Need for the EU to really look at fair policy infrastructure to account for sequestration and energy generation at farm level for EU dairy.
- Need for the EU to look properly at the concept of nutrition density/carbon metrics.
- Very concerning element in the industrial Emissions Directive recast and the nature restoration proposals that have the ability to undermine EU dairy greatly while also strongly promoting carbon leaking and global warming by offshoring production to higher emitting areas of the world.
- Energy & Supply chain in dairy processing now a big issue for cost on competitiveness. Huge production price inflation allied with huge on farm input inflation.
- Need for clear scope and timelines on Commission recent commitment to conduct an impact assessment be done on Farm to Fork strategy.
- Commend the role, commitment and patience from Commission on the Protocol issue and the recently agreed updates such as the Windsor Framework.
- Easements for EU single market goods returning to the single market via the UK.
- EU/UK help around mixed milk products from the island of Ireland EU FTA access and sCMO.
- Protection of dairy terms- Commission clearly not enforcing clear existing law.
- Need for EU to work strongly towards digitisation of Certs and other documents in line with international digital economy.
- Continued vigilance by commission on promoting the trade agenda globally. And that the commission should be particularly cognisant about undermining EU value added dairy in particular from rivals such as NZ and Australia.

➔ 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:

Key issues remain energy, supply chains and ingredients like sunflower oil.

MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 24 MAY 2023

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-Feb 2023 / Jan-Feb 2022	What are your expectations for deliveries in Q2/23 compared to Q2/22?	What are your expectations for deliveries in Q3/23 compared to Q3/22?
-2,9%	Stable (deliveries)	+ (deliveries)
Milk price evolution		What are your expectations for prices in Q2/23 compared to Q2/22?
Current milk price: 54,9 (euro per 100 kg)	March 23 / March 22: +35,3%	+ (prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Feb 2023/ Jan-Feb 2022	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Expectations Q3/23 compared to Q3/22 (+ / - / stable)	April 23 / April 22	Expectations Q3/23 compared to Q2/23 (+ / - / 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	+0,9%	Stable	Stable	+17%	Stable	The price variations refer to Grana Padano Pdo 9 months
BUTTER	+1,2%	Stable	Stable	-42%	Stable	The price variations refer to pasteurized butter
WHEY	n.a.	n.a.	n.a.	-50%	Stable	The price variations refer to whey for industrial use



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2023 – April 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Although the milk deliveries official trend, many companies report us increase in deliveries and some of the areas of major collection seem to maintain quite stable their trend in comparison with 2022. A few worries about the drought.

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2023)**

Expected evolution in milk supply (+/-?): for now no reliable predictions
Production trends for main products: for now no reliable predictions
Consumption trends: general contraction of the internal consumer demand, but we cannot quantitatively estimate it yet. Nonetheless, in the market there will continue to be also some rising trends about quality, traceability, sustainability and health&wellness.
Exports (+/- and why?): The external markets will be always a fundamental driver for the growth of our sector and our companies. But difficult to make forecasts on the second half of the year. Maybe it will be a further increase, anyway we prudentially indicate it as moderate. In fact, in 2022 the dairy exports have reached record volumes in many countries despite of the inflation. In January 2023 it has registered another positive month (+6% by volume and +28% by value), but limited to the European countries (EU and not-EU); our main extra-EU markets have showed a stasis.
Latest developments of the National Organic market: n.a.

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

As already highlighted in the previous survey, the export issue of exceptions to the on-site packaging and portioning of some important PDO cheeses, envisaged in the context of the EPA with Japan, is still unsolved. As known, it is the hope of the sector that the exemption for the benefit of Japanese operators is extended by at least additional 7 years.
 Restrictions on the use of animal rennet continue to have a major impact on exports to India.



➔ **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:

We consider the risk of an energy and grain rationing less likely than it was in 2022 although the periodic increases in the international tension. But for the rest it remains difficult to make predictions and, with regard to the issue of production costs, the situation seems to be only a bit better than in the midst of 2022.

MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 24 MAY 2023

Delegation: 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-Mar 2023 / Jan-Mar 2022	What are your expectations for deliveries in Q2/23 compared to Q2/22?	What are your expectations for deliveries in Q3/23 compared to Q3/22?
+4,1%	Milk deliveries will still increase (estimated at +2%), though at a slower pace than in Q1, due to the decrease in farm gate milk prices.	Stable to slightly reduced.
Milk price evolution		What are your expectations for prices in Q2/23 compared to Q2/22?
Current milk price: € 43,25 €/100kg (May 2023)	March 23 / March 22: +9% May 23 / May 22: -18%	Farm gate milk prices will stabilize.

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc.)
	Jan-Feb 2023/ Jan-Feb 2022	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Expectations Q3/23 compared to Q3/22 (+ / - / stable)	April 23 / April 22	Expectations Q3/23 compared to Q2/23 (+ / - / stable)	
SMP	+21,6%	n.a.	n.a.	-45%	n.a.	n.a.
WMP	-0,8%	n.a.	n.a.	-37%	n.a.	n.a.
CHEESE	+2,7%	n.a.	n.a.	-1%*	n.a.	n.a.
BUTTER	-4,6%	n.a.	n.a.	-36%	n.a.	n.a.
WHEY	-0,9%	n.a.	n.a.	-56%	n.a.	n.a.
*March price						



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2023 – April 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Dairy Export development

Dutch export development in the period January till February 2023 was mainly positive. Export volumes of cheese (+14%), skimmed milk powder (+18%) and butter and butteroil (+33%) increased significantly. Only trade of non-skimmed milk powder (-19%) decreased sharply, continuing the structural decline of the last year. Because of the strong volume growth and the still high market prices the Dutch export value increased significantly by 31% to more than € 1.9 billion.

Political developments: Dutch Agricultural Agreement

Since November last year, the Minister of Agriculture started consultation rounds with stakeholders to draw an Agricultural Agreement with a vision for the future of agriculture in the Netherlands. This Agricultural Agreement will tackle several agricultural tasks at once (e.g. nitrogen, greenhouse gases etc.).

The electoral victory of the political party “Farmer-citizen Movement (“Boer Burger Beweging, BBB) of March 15th and their dissatisfaction with the nitrogen approach and the set of choices to reduce ammonia and nitrogen oxide emissions, led to a number of dairy farmers' organizations withdrawing from the negotiations to draw an agreement. The publication of the Agricultural Agreement was foreseen at the end of Q1 of 2023, but is delayed.

Proposed new measures to reduce the emissions of CO₂ to meet the Dutch climate goals

In order to meet the climate goals in 2030 the Dutch cabinet announced a new set of measures to reduce CO₂-emission. Two proposed measures will have a direct impact on the dairy industry: amendment of the scheme of energy taxes (high taxation for use of gas) and the amendment of the Dutch energy efficiency regulation. The cabinet will start with an impact analysis on the proposed measures.

Dairy farming developments

At 1.57 million heads, the national dairy cattle herd remained virtually unchanged in 2022. The herd was 7% smaller than five years ago. The national pig herd decreased again last year, while the size of the goat herd increased slightly. Statistics Netherlands (CBS) reports this on the basis of definitive figures from the 2022 Agricultural Census.

Last year, there were 14.7 thousand holdings with dairy cattle, 3% less than in 2021 and representing a decline by nearly 20% relative to 2017. The average herd size per holding increased to 107 heads in 2022 from 103 on average in the previous year, while in 2017 the average dairy farm had 94 head.

Processing industry developments

- Royal A-ware bought a dairy factory (production plant of fresh cheese, desserts and cheese flan) in Salas, Spain. Royal A-ware plans to invest in the factory to make it more sustainable and future-proof. From 2024 on, they want to produce mozzarella from cow milk in Salas.
- Environmental organization Mobilization for the Environment (MOB) objects to the draft decision to grant Greek dairy company Fage a permit to build a large yoghurt factory near Hoogeveen (province Drenthe). MOB believes that the province of Drenthe does not sufficiently take into account the environmental interests in the environmental permit for the Greek yoghurt giant.



➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

After a short recovery of the dairy market in February to early March, the dairy market came under pressure again due to disappointing demand and an increasing supply. The milk production in the Netherlands grew, additionally reinforced by the spring peak in the northern hemisphere. In particular, the Dutch quotation of skimmed milk powder fell in March and April. The Dutch butter quotation initially held up reasonably well, but from the end of March again there was some pressure on prices. In mid-April, the price level stabilized.

For the second half of the year no abundant growth in milk supply is expected. Milk prices are at a much lower level and costs are still relatively high, so dairy farmers are less motivated to extend their production. In other parts of the world, unfavourable weather patterns seem to have a negative impact on milk volumes as well. On the other hand the current lower market prices will attract buyers to come back into the market. These two factors together can lead to a possible upswing of the dairy market in the third and fourth quarter of 2023.

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2023)**

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

Production trends for main products: n.a.

Consumption trends: n.a.

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

Latest developments of the National Organic market: n.a.

➔ **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 24 MAY 2023

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- Feb 2023 / Jan- Feb 2022	What are your expectations for deliveries in Q2/23 compared to Q2/22?	What are your expectations for deliveries in Q3/23 compared to Q3/22?
+1,3%	stable (deliveries)	decrease (deliveries)
Milk price evolution		What are your expectations for prices in Q2/23 compared to Q2/22?
Current milk price: 48,61€/100kg	March 23 / March 22 : +13,4%	decrease (prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan- Feb 2023/ Jan- Feb 2022	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Expectations Q3/23 compared to Q3/22 (+ / - / stable)	March 23 / March 22	Expectations Q3/23 compared to Q2/23 (+ / - / stable)	(Including stocks, consumption, etc.)
SMP	-0,06%	-	-	-25%	-	
WMP	-0,01%	-	-	-15%	-	
CHEESE	+0,04%	+	+	+17%	-	
BUTTER	-0,06%	-	-	-22%	-	
WHEY	ND	-	-	-12%	-	



➤ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2023 – April 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

CN	Exports (incl. EU)					
	Value ['000 EUR]		Value ['000 PLN]		Volume [tons]	
	I-II 2022	I-II 2023	I-II 2022	I-II 2023	I-II 2022	I-II 2023
Total	465 133	509 226	2 127 472	2 386 793	271 542	272 205
0401	93 387	88 460	427 123	414 570	132 585	122 997
0402	69 540	82 637	318 148	387 541	22 777	27 539
0403	28 515	34 531	130 440	161 806	20 947	20 820
0404	41 160	39 354	188 333	184 467	37 527	40 674
0405	72 216	80 792	329 800	378 669	13 039	15 453
0406	160 316	183 451	733 628	859 740	44 666	44 723

➤ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

➤ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2023)**

Expected evolution in milk supply (+/-?): decrease – due to low prices
Production trends for main products: decrease – due to decreasing prices and high costs
Consumption trends: decrease due to inflation
Exports (+/- and why?): decrease in value – due to prices, increase in volume due to prices and decreasing domestic consumption
Latest developments of the National Organic market: market is shrinking

➤ **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 24 MAY 2023

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-Mar 2023 / Jan-Mar 2022	What are your expectations for deliveries in Q2/23 compared to Q2/22?	What are your expectations for deliveries in Q3/23 compared to Q3/22?
-1,4%	Slight increase	Stable
Milk price evolution		What are your expectations for prices in Q2/23 compared to Q2/22?
Current milk price: 0.595€/L	March 23 / March 22: +55%	Slight decrease

↻ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Feb 2023/ Jan-Feb 2022	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Expectations Q3/23 compared to Q3/22 (+ / - / stable)	April 23 / April 22	Expectations Q3/23 compared to Q2/23 (+ / - / stable)	(Including stocks, consumption, etc.)
SMP	N/A	N/A	N/A	N/A	N/A	N/A
WMP	N/A	N/A	N/A	N/A	N/A	N/A
CHEESE	N/A	N/A	N/A	N/A	N/A	N/A
BUTTER	N/A	N/A	N/A	N/A	N/A	N/A
WHEY	N/A	N/A	N/A	N/A	N/A	N/A



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2023 – April 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Raw milk prices reached maximum levels of the history and farmers would like to keep the prices at this level, despite of the reduction of some costs. According to official figures, raw milk prices started to go down some weeks ago, so the relations with farmers are becoming difficult (i.e. demonstrations).

Food products prices for consumers increased during the last months significantly. Therefore, consumers prefer cheaper products (increase of private label). Distributors are putting a big pressure on the processors to reduce prices in order to attract new customers.

The price of the food products for consumers is still in the centre of the political debate in Spain. The Spanish Government has adopted some exceptional measures to help families: reduction of the VAT for some food products (i.e. 0% VAT for liquid milk and cheeses during 6 months) and 200€ vouchers for vulnerable families. Exceptional aid of the Spanish Government for dairy farmers (169 mill. €).

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

The lack of rains in Spain is becoming a new factor that may affect to the prices of the agricultural products in the short/medium term.

Uncertainty due to the development of the war in Ukraine in terms of costs (energy and raw materials).

New national / regional regulations on sustainability, plastics, recycling waste, etc. have been approved, going beyond EU rules (i.e. new tax for plastics).

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2023)**

Expected evolution in milk supply (+/-?):
Production trends for main products:
Consumption trends:
Exports (+/- and why?):
Latest developments of the National Organic market:

➔ **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:



EU Dairy Market Situation

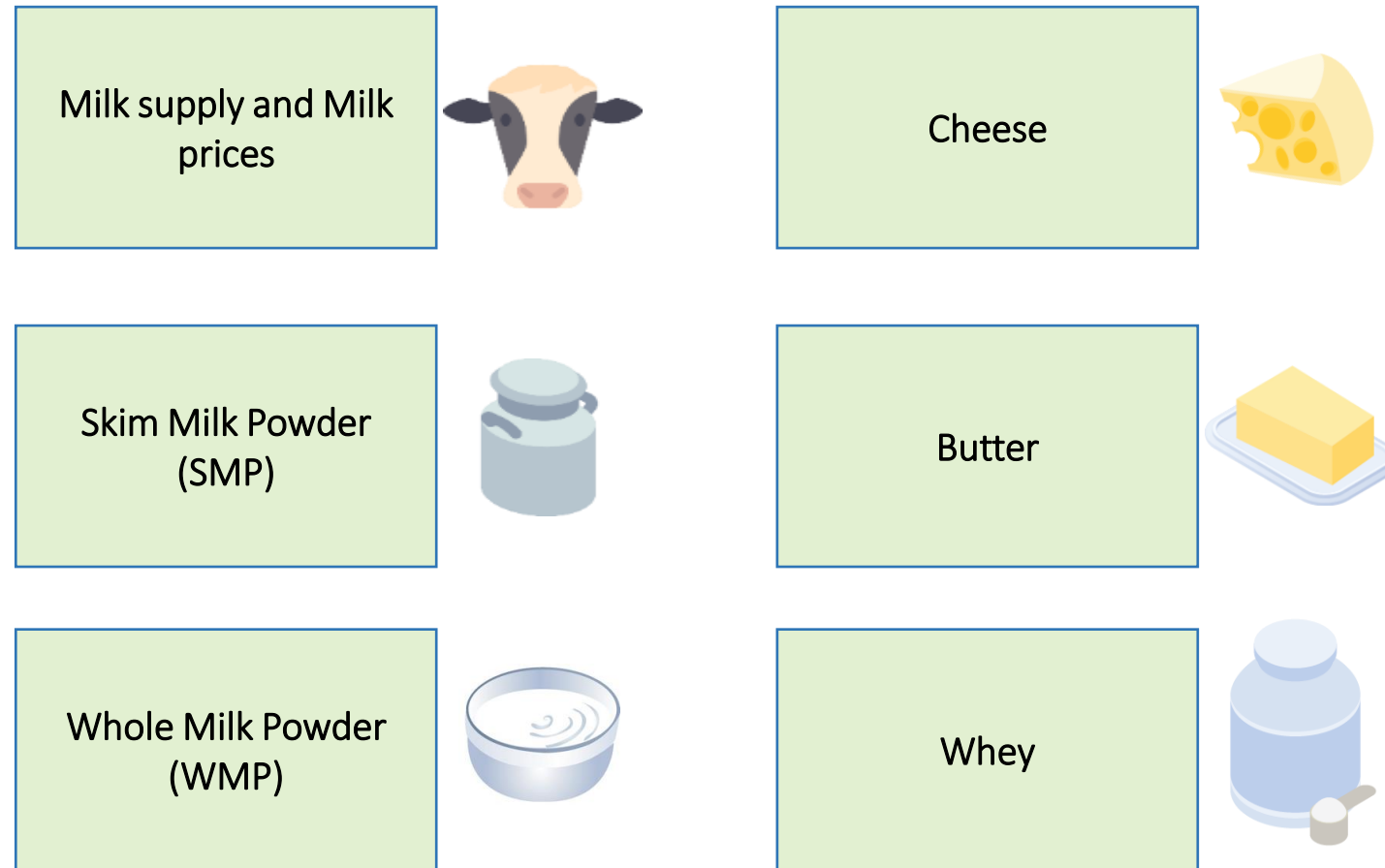
EDA Trade and Economics Committee

Wednesday 24 May, 2023



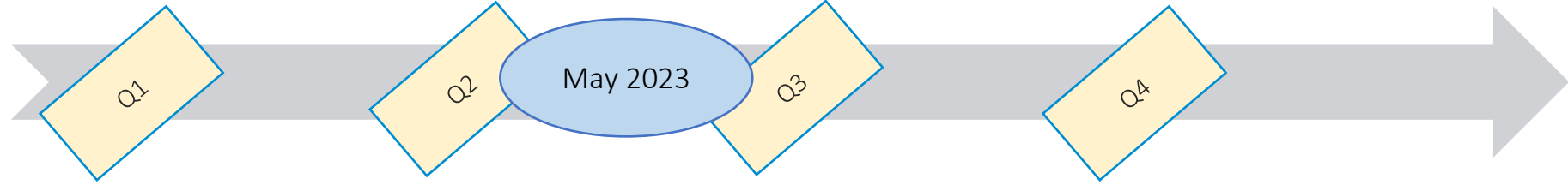
Trade & Economics' Committee Market Survey – 24/05/23

Content





Milk supply and Milk prices



Skim Milk Powder (SMP)

Whole Milk Powder (WMP)

Cheese

Butter

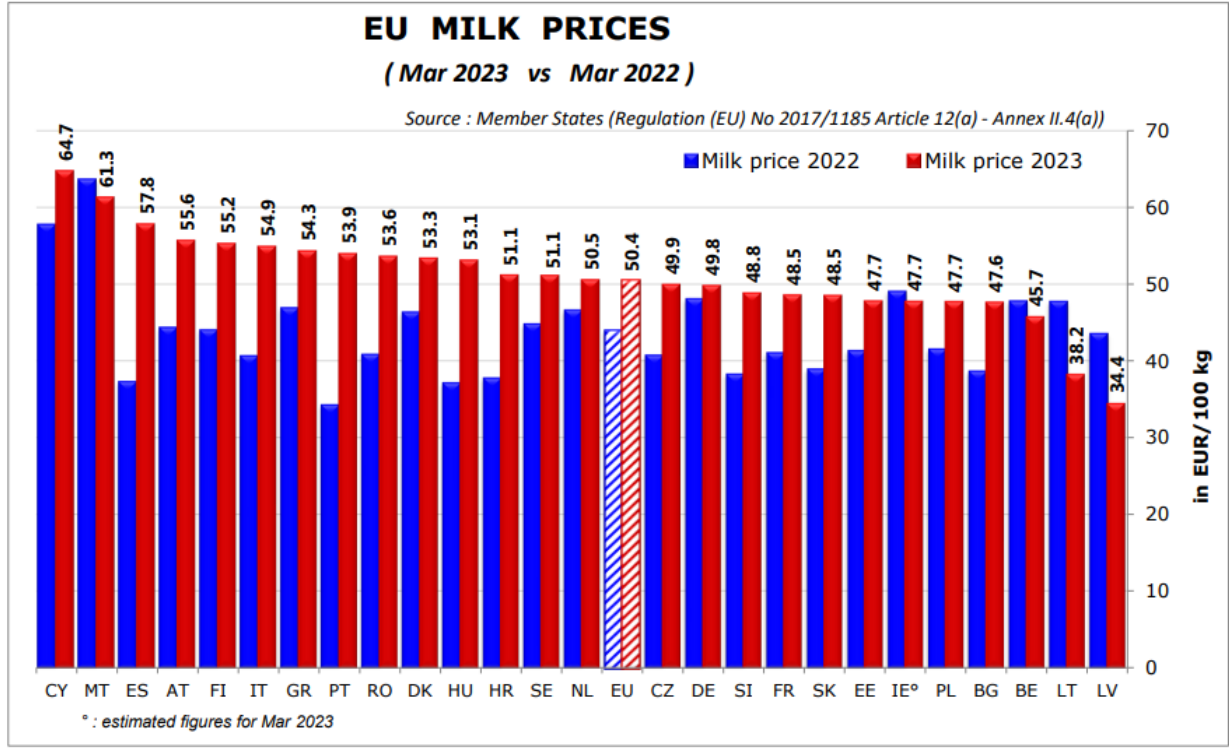
Whey

Milk deliveries trend Jan-Mar 2023/Jan-Mar 2022

- 3 Members reported increases and 5 Members reported decreases in deliveries in Jan-Mar 2023 compared to the same period in 2022.

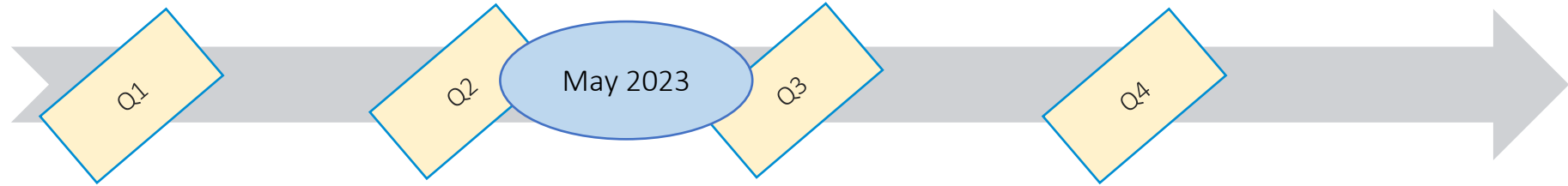
Deliveries: expectations Q2/2023 : Q2/2022
Mixed expectations of the members regarding deliveries in the 2nd quarter of 2023.

Deliveries: expectations Q3/2023 : Q3/2022
Most members expect deliveries in the 3rd quarter of 2023 to decrease or stabilize.





Skim Milk Powder (SMP)



Milk supply and Milk prices

SMP production Jan-Mar 2023: Jan-Mar 2022
Members report increases and decreases in SMP production over Jan-Mar 2023:2022.

Whole Milk Powder (WMP)

Cheese

Butter

Whey

SMP expectations Q2/2023:Q2/2022
Mixed expectations of the members regarding deliveries in the 2nd quarter of 2023.

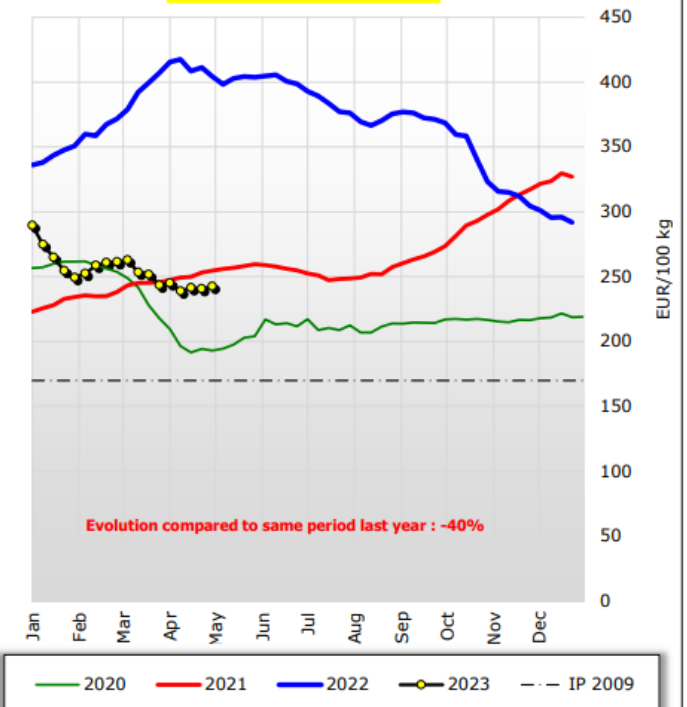
SMP expectations Q3/2023:Q3/2022
Members expect decreases for deliveries in the 3rd quarter of 2023.

SMP price

- Mixed figures reported in SMP prices reported by members for April 2023 compared to the same month of 2022
- Mixed figures reported in SMP prices reported by members for Q3 2023 compared to Q2 2022

Weekly EU SMP Prices

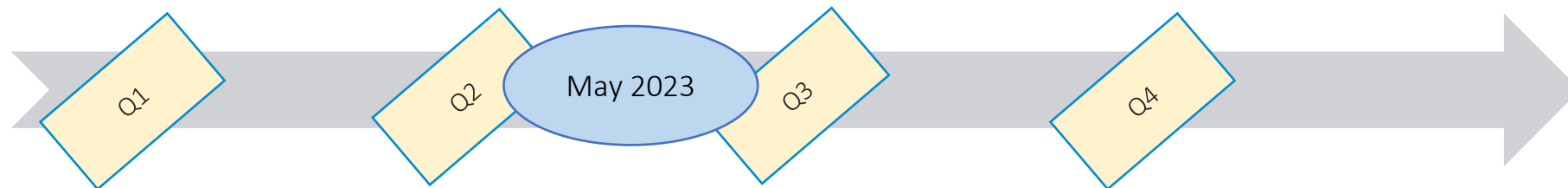
Latest price : 243 EUR/100kg



Trade & Economics' Committee Market Survey – 24/05/23



Whole Milk Powder (WMP)



Milk supply and Milk prices

Skim Milk Powder (SMP)

Cheese

Butter

Whey

WMP production Jan-Mar 2023: Jan-Mar 2022
Mixed figures reported for WMP over Jan-Mar 2023:Jan-Mar 2022.

WMP expectations Q2/2023:Q2/2022
Mixed expectations of the members regarding deliveries in the 2nd quarter of 2023.

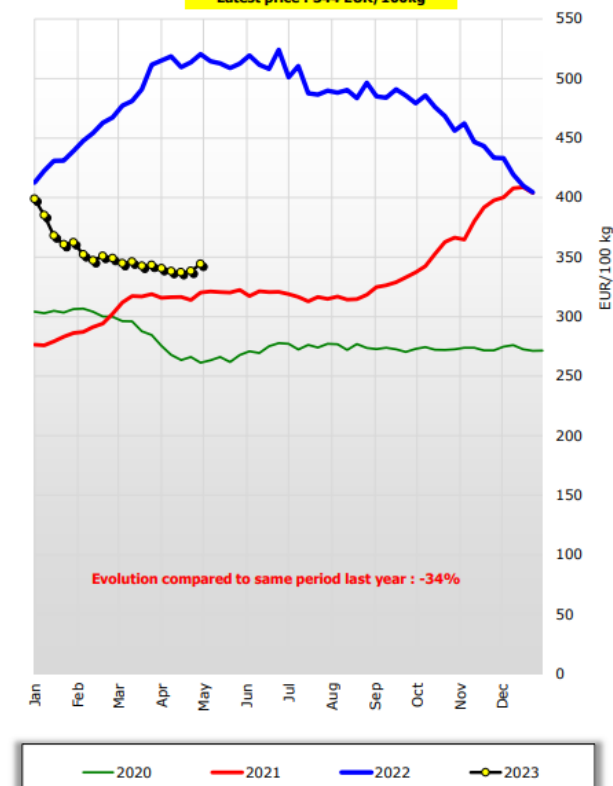
WMP expectations Q3/2023:Q3/2022
Mixed expectations of the members regarding deliveries in the 3rd quarter of 2023.

WMP price

- Countries report decreasing prices for WMP for April 2023:April 2022.
- Mixed expectations were reported for Q3/2023 compared to Q2/2023.

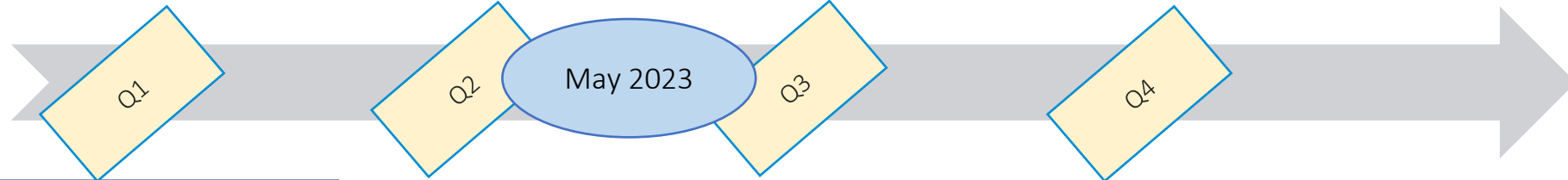
Weekly EU WMP Prices

Latest price : 344 EUR/100kg





Cheese



Milk supply and Milk prices

Cheese production Jan-Mar 2023: Jan-Mar 2022
Members report decreases and increases in cheese production.

Skim Milk Powder (SMP)

Cheese expectations Q2/2023:Q2/2022
Members expect deliveries to increase and decrease in the 2nd quarter of 2023.

Whole Milk Powder (WMP)

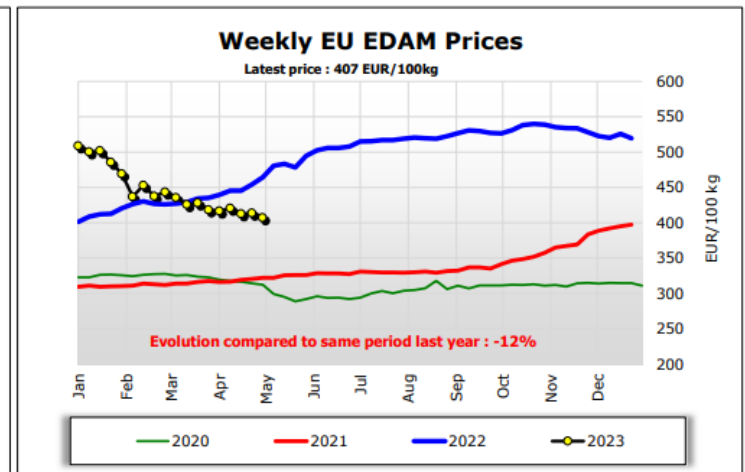
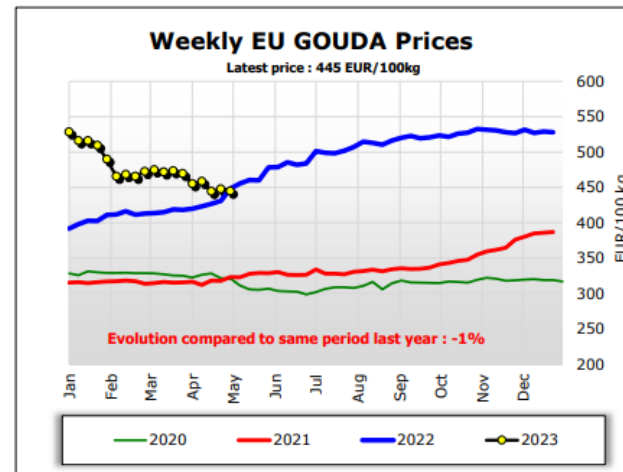
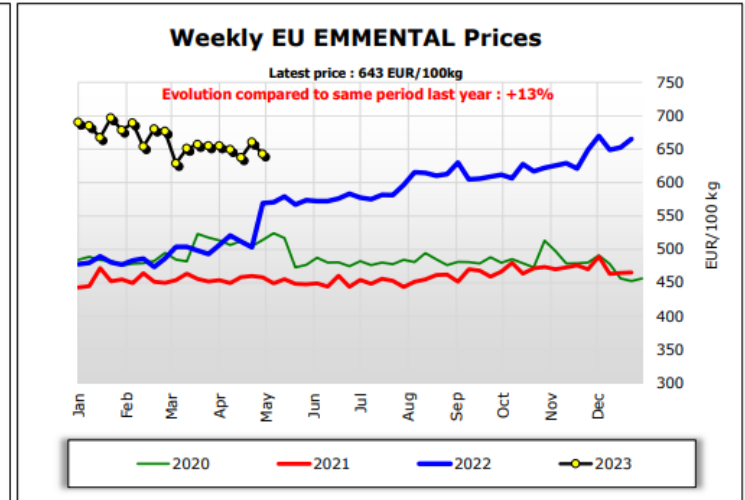
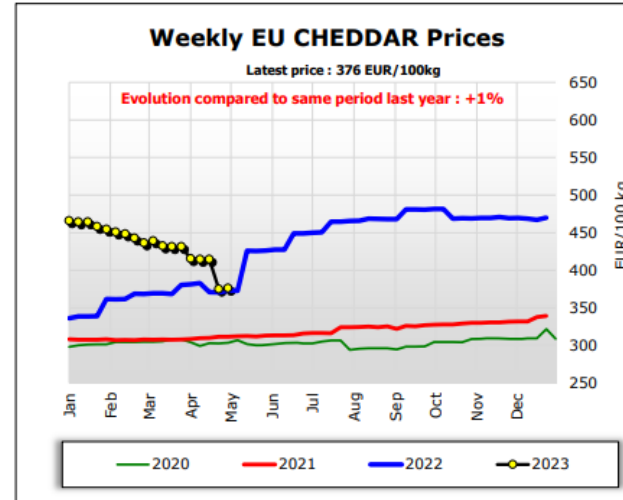
Cheese expectations Q3/2023:Q3/2022
Mixed expectations in deliveries in the 3rd quarter of 2023.

Butter

Cheese price

- Countries reported increasing and decreasing prices for cheese for April 2023 compared to April 2022.
- Mixed expectations reported by members for Q3/2023 compared to Q2/2023.

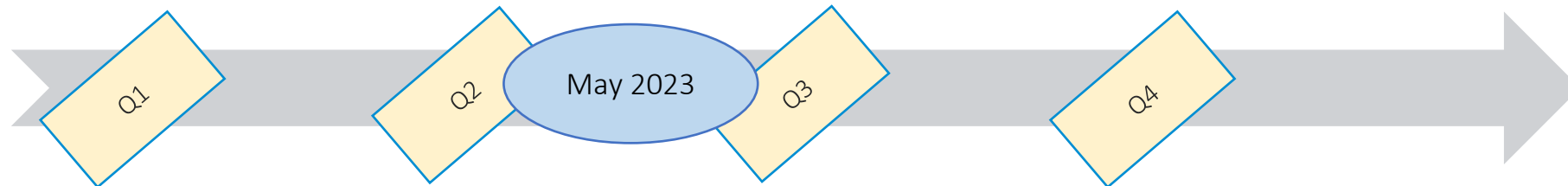
Whey



Trade & Economics' Committee Market Survey – 24/05/23



Butter



Milk supply and Milk prices

Skim Milk Powder (SMP)

Whole Milk Powder (WMP)

Cheese

Whey

Butter production Jan-Mar 2023: Jan-Mar 2022
Countries reported increases in butter production in Jan-Mar 2023 compared to the same period in 2022.

Butter expectations Q1/2023:Q1/2022
Mixed expectations on deliveries in the 2nd quarter of 2023.

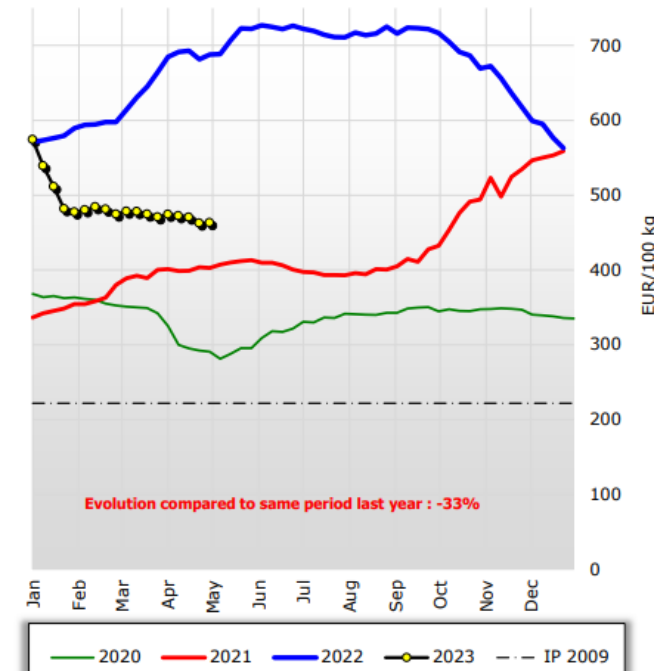
Butter expectations Q2/2023:Q2/2022
Members expect deliveries to decrease in the 3rd quarter of 2023.

Butter price

- Decreases reported in butter prices for April 2023:April 2022 by many of the countries.
- Mixed price expectations for Q3/2023 compared to Q2/2023.

Weekly EU BUTTER Prices

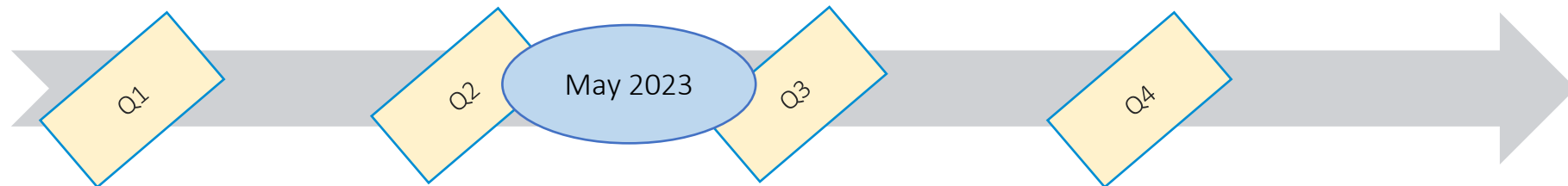
Latest price : 463 EUR/100kg



Trade & Economics' Committee Market Survey – 24/05/23



Whey



Milk supply and Milk prices

Skim Milk Powder (SMP)

Whole Milk Powder (WMP)

Cheese

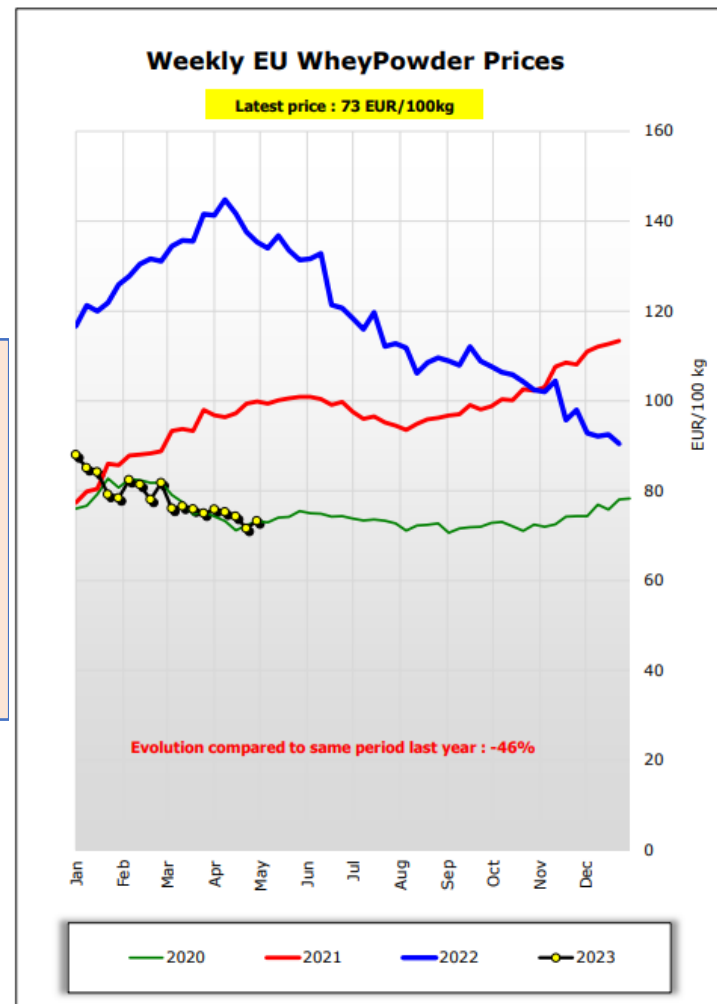
Butter

Whey production Jan-Mar 2023: Jan-Mar 2022
Mixed figures were reported for whey production according to reporting members over Mar2023:Mar2022.

Whey expectations Q2/2023:Q2/2022
Mixed expectations from members for the 2nd quarter of 2023.

Whey expectations Q3/2023:Q3/2022
Mixed expectations from members for the 3rd quarter of 2023.

Whey price
Members report decreases in whey prices for April 2023:April 2022.
Members report increasing and stable price expectations for Q3/2023 compared to Q2/2023.



MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 24 MAY 2023

Delegation: UK

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

🔄 MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-Mar 2023 / Jan-Mar 2022	What are your expectations for deliveries in Q2/23 compared to Q2/22?	What are your expectations for deliveries in Q3/23 compared to Q3/22?
+1.2%	+1.8% (deliveries)	+1.0% (deliveries)
Milk price evolution		What are your expectations for prices in Q2/23 compared to Q2/22?
Current milk price: 50.59 €/100kg.	March 23 / March 22: +16.2%	(prices)

🔄 DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc.)
	Jan-Mar 2023/ Jan-Mar 2022	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Expectations Q3/23 compared to Q3/22 (+ / - / stable)	April 23 / April 22	Expectations Q3/23 compared to Q2/23 (+ / - / stable)	
SMP	Powder figures are not available split into WMP and SMP. Total powder production for January to March was 4.6% up on 2022			-41.1%		
WMP	n.a.			n.a.		
CHEESE	+2.9%			-21.5%		
BUTTER	-9.5%			-33.4%		
WHEY	n.a.			n.a.		



➤ **NATIONAL DAIRY MARKET DEVELOPMENTS: January 2023 – April 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Total UK dairy exports during the opening two months of 2023 were 9.8% down on last year in terms of volume, but 23.1% higher by value. Dairy imports during the same period were 8.6% up by volume and 51.1% higher in terms of value.

The improvement in milk production continued through the second half of the 2022/23 milk year with every month from October being higher than the year before. This was predominantly driven by higher yields in association with the high milk prices paid through the winter months. For the 2022/23 year as a whole, production was down by 0.05% from 2021/22, with the deficit accumulated in the opening months being offset by the increased production in the second half of the year.

Farmgate milk prices grew strongly over the opening nine months of the milk year, rising to a record high in December 2022. Since then, however, prices have been declining in response to the reduced market returns and higher milk availability.

In general, inflation in key input costs has slowed in recent months, recording some significant drops for both feed and fertiliser, although prices for fuel, fertiliser and feed still remain relatively high in historic terms. The combination of high production costs and declining prices means farm margins will come under increased pressure through the season.

Having peaked in September, UK wholesale prices have been falling steadily since then due to a combination of plentiful supplies and high prices reducing demand. Over the past seven months, prices for all the major commodities have fallen to significantly lower levels (cream - 47%, butter -34%, SMP -35% and mild Cheddar -27%).

The UK Government released its Plan for Water in April, which includes plans to:

- Increase uptake of farming schemes from 34% to 70% of farmland by 2028.
- Increase funding available for the Catchment Sensitive Farming programme to £15 million to cover all farmland in England.
- Deliver six new Sustainable Farming Incentive standards this year with actions that will benefit the water environment.

➤ **NATIONAL DAIRY OUTLOOK SHORT TERM (3RD QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

GB milk production for the 2023/24 season is forecast to reach 12.46bn litres, 0.5% more than the current milk year, based on yields beginning to fall back following the spring flush, while the GB milking herd will remain relatively stable. Yield growth through the summer and autumn is expected to slow from current levels of around 2-3% to more typical annual growth rates of 1-1.5% per annum.

The majority of milk processors have announced further cuts in the prices they pay to farmers for April and May.



➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (2ND HALF 2023)**

Expected evolution in milk supply (+/-?):	+0.4%
Production trends for main products:	
Consumption trends:	
Exports (+/- and why?):	
Latest developments of the National Organic market:	

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

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➔ **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:

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