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TRADE AND ECONOMICS COMMITTEE

Wednesday March 8, 2023

EDA offices, Brussels, Belgium





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EDA Dairy Market Situation



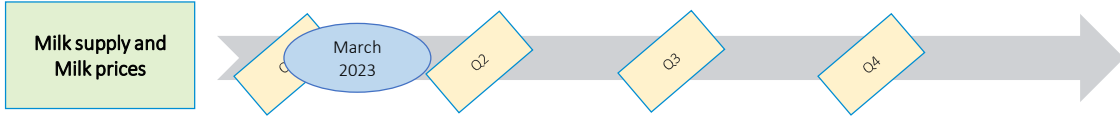


Trade & Economics' Committee Market Survey – 08/03/23

Content

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

Trade & Economics' Committee Market Survey – 08/03/23



- Skim Milk Powder (SMP)
- Whole Milk Powder (WMP)
- Cheese
- Butter
- Whey

Milk deliveries trend Jan-Dec 2022/Jan-Dec 2021

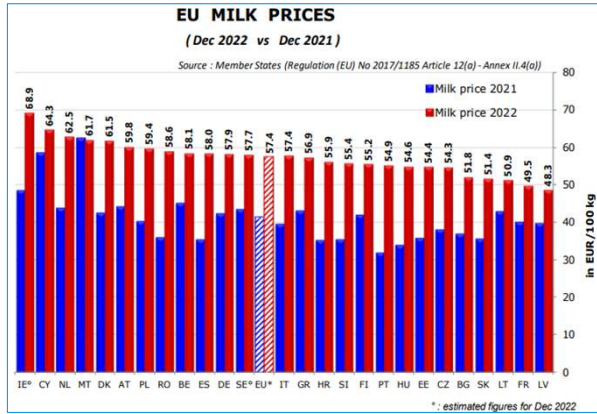
- 5 Members reported increases and 5 Members reported decreases in deliveries in Jan-Sept 2022 compared to the same period in 2021.

Deliveries: expectations Q1/2023 : Q1/2022

Mixed expectations of the members regarding deliveries in the 1st quarter of 2023.

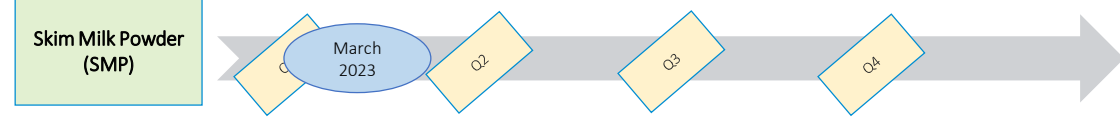
Deliveries: expectations Q2/2023 : Q2/2022

Most members expect deliveries in the 2nd quarter of 2023 to increase or stabilize.



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Trade & Economics' Committee Market Survey – 08/03/23



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

SMP production Jan-Dec 2022: Jan-Dec 2021

Members report decreases in SMP production over Jan-Dec 2022:2021.

SMP expectations Q1/2023:Q1/2022

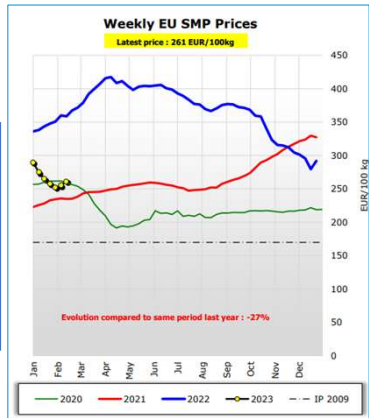
Mixed expectations of the members regarding deliveries in the 1st quarter of 2023.

SMP expectations Q2/2023:Q2/2022

Mixed expectations of the members regarding deliveries in the 2nd quarter of 2023.

SMP price

- Mixed figures reported in SMP prices reported by members for February 2023 compared to the same month of 2022
- Mixed figures reported in SMP prices reported by members for Q1 2023 compared to Q2 2022

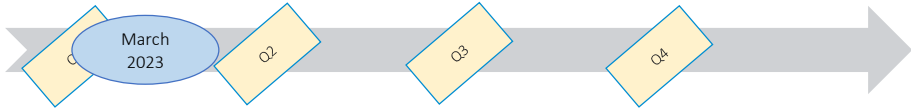


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Whole Milk Powder (WMP)



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

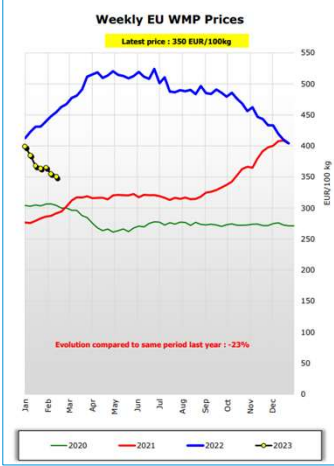
WMP production Jan-Dec 2022: Jan-Dec 2021
Mixed figures reported for WMP over Jan-Dec 2022: Jan-Dec 2021, decreasing prices for reporting members while Austria, Czech Republic and Germany report increases.

WMP expectations Q1/2023:Q1/2022
Mixed expectations of the members regarding deliveries in the 1st quarter of 2023.

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

WMP price

- Countries report mixed prices for WMP for Feb 2023: Feb 2022.
- Mixed expectations were reported for Q1/2023 compared to Q4/2022.

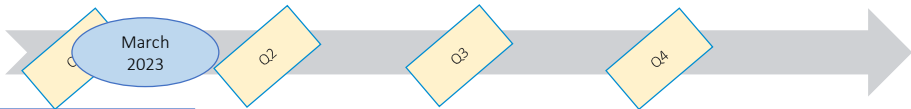


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Cheese



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

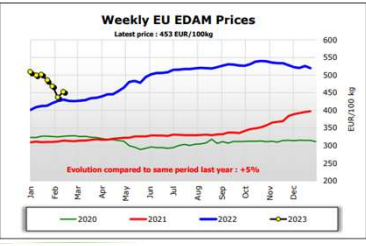
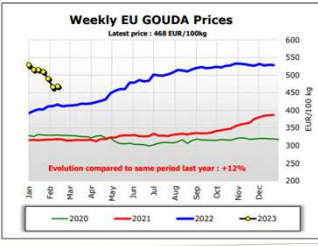
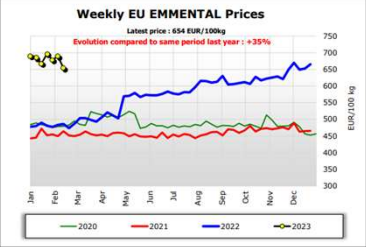
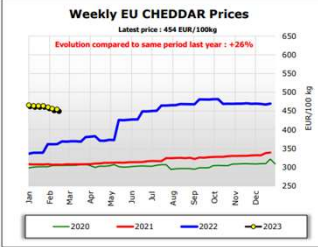
Cheese production Jan-Dec 2022: Jan-Dec 2021
Members report decreases and increases in cheese production.

Cheese expectations Q1/2023:Q1/2022
Members expect deliveries to increase and decrease in the 1st quarter of 2023.

Cheese expectations Q2/2023:Q2/2022
Mixed expectations in deliveries in the 2nd quarter of 2023.

Cheese price

- Many countries reported increasing prices for cheese for February 2023 compared to February 2022.
- Mixed expectations reported by members for Q1/2023 compared to Q4/2022.

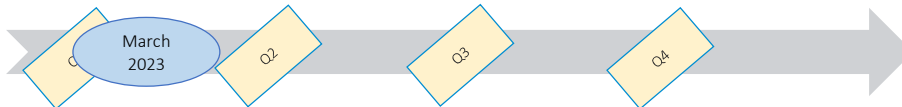


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Butter



Milk supply and Milk prices

Skim Milk Powder (SMP)

Whole Milk Powder (WMP)

Cheese

Whey

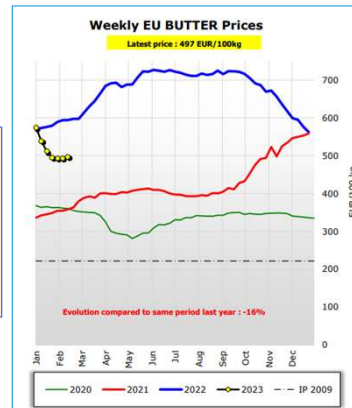
Butter production Jan-Dec 2022: Jan-Dec 2021
Countries reported increases and decrease in butter production in Jan-Dec 2022 compared to the same period in 2021.

Butter expectations Q1/2023:Q1/2022
Members expect deliveries to increase or stabilize in the 1st quarter of 2023.

Butter expectations Q2/2023:Q2/2022
Members expect deliveries to increase or stabilize in the 2nd quarter of 2023.

Butter price

- High decreases reported in butter prices for February 2023:February 2022 by many of the countries.
- Mixed price expectations for Q1/2023 compared to Q4/2022.

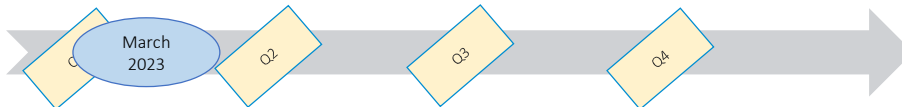


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Whey



Milk supply and Milk prices

Skim Milk Powder (SMP)

Whole Milk Powder (WMP)

Cheese

Butter

Whey production Jan-Dec 2022: Jan-Dec 2021
Mixed figures were reported for whey production according to reporting members over Jan2022:Jan2021.

Whey expectations Q1/2023:Q1/2022
Mixed expectations from members for the 1st quarter of 2023.

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

Whey price

Members report decreases in whey prices for February 2023:February 2022.

Mixed price expectations are reported for Q1/2023 compared to Q4/2022.



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MARKET SITUATION

BY M. WOHLFARTH, ZMB



Market Information
for the
EDA Trade & Economics Committee
February 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	144.900
Milk for liquid consumption	29.684	23.924	23.129	22.900	22.900
Fermented Products and Desserts	8.141	7.769	7.685	7.700	7.730
Butter					
Production ³⁾	2.402	2.254	2.210	2.200	2.190
Consumption	2.180	1.997	2.025	1.990	2.040
Cheese					
Production ⁴⁾	10.870	10.562	10.720	10.690	10.740
Consumption ⁵⁾	10.074	9.372	9.550	9.510	9.560
Skim Milk Powder					
Production	1.672	1.630	1.525	1.550	1.540
Consumption	940	900	860	830	840
Whole Milk Powder production	860	858	800	750	720
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	5.800
Population (million head)	513	447	447	451	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 February 2023

Milk Supplies

Table 2

EU: Cow Milk Deliveries to Dairies

'000 tonnes	2017	2018	2019	2020	2021	2022x	Forecast 2023
EU 27_2020	140.738	142.158	142.850	145.204	144.756	144.907	144.900
EU 28	155.887	157.350	158.283	160.656	160.203	160.256	160.300
EU 27_2007	155.411	156.897	157.848	160.222	159.774	159.851	159.880
EU 25	153.804	155.134	156.071	158.393	157.969	158.053	158.040
EU 15	132.998	134.027	134.714	136.473	135.922	135.737	135.460
EU 10	20.805	21.106	21.357	21.920	22.047	22.316	22.580
EU 2	1.607	1.763	1.777	1.829	1.805	1.798	1.840
Belgium	3.925	4.079	4.177	4.329	4.308	4.450	4.500
Bulgaria	579	643	652	694	679	664	690
Czech Rep.	2.984	3.057	3.034	3.192	3.129	3.173	3.180
Denmark	5.494	5.615	5.615	5.666	5.644	5.664	5.650
Germany	31.937	32.491	32.442	32.552	31.942	31.947	31.800
Estonia	727	748	763	788	799	800	800
Greece	603	621	633	652	660	648	650
Spain	7.028	7.117	7.251	7.409	7.478	7.324	7.300
France	24.579	24.589	24.535	24.584	24.208	23.980	23.800
Ireland	7.480	7.813	8.226	8.545	9.017	9.084	9.200
Italy	11.902	12.071	12.117	12.668	13.057	13.000	13.100
Cyprus	216	228	239	274	298	287	285
Latvia	832	781	785	791	813	811	820
Lithuania	1.403	1.367	1.358	1.360	1.349	1.363	1.360
Luxembourg	374	395	409	435	s 445	s 450	:
Hungary	1.545	1.535	1.576	1.626	1.727	1.683	1.700
Croatia	477	453	436	434	429	405	420
Malta	41	40	41	43	40	40	40
Netherlands	14.296	13.881	13.802	13.987	13.599	13.761	13.600
Austria	3.200	3.183	3.140	3.137	3.154	3.246	3.200
Poland	11.652	11.963	12.183	12.434	12.481	12.759	13.000
Portugal	1.848	1.867	1.899	1.923	1.909	1.853	1.850
Romania	1.028	1.120	1.125	1.135	1.126	1.134	1.150
Slovenia	579	571	564	580	589	575	570
Slovakia	826	817	814	834	823	825	825
Finland	2.366	2.354	2.330	2.362	2.272	2.216	2.200
Sweden	2.817	2.760	2.704	2.773	2.782	2.765	2.750
UK	15.149	15.193	15.433	15.452	15.447	15.349	15.400

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

Updated February 2023

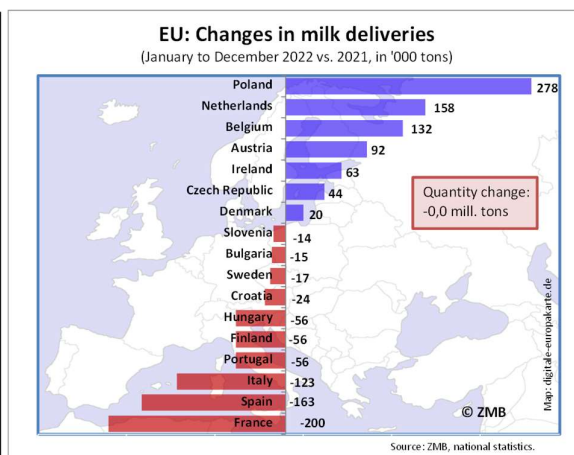
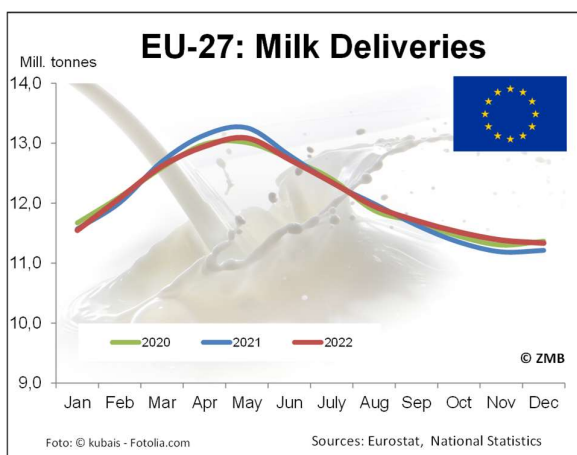


Table 3

EU Milk Deliveries	January - December			Dec.
000 tonnes	2021	2022*	22:21 *	22:21 *
Belgium	4.318	4.450	+ 3,1%	+ 5,8%
Bulgaria	679	664	- 2,3%	+ 9,8%
Czech Rep.	3.129	3.173	+ 1,4%	+ 0,9%
Denmark	5.644	5.664	+ 0,4%	+ 0,6%
Germany	31.942	31.947	+ 0,0%	+ 3,0%
Baltic States	2.961	2.974	+ 0,5%	- 1,9%
Greece	660	648	- 1,8%	- 2,4%
Spain	7.487	7.324	- 2,2%	- 2,0%
France	24.180	23.980	- 0,8%	- 1,3%
Ireland	9.021	9.084	+ 0,7%	+ 7,4%
Italy	13.103	12.980	- 0,9%	-
Croatia	429	405	- 5,5%	- 5,4%
Hungary	1.739	1.683	- 3,2%	- 5,6%
Netherlands	13.603	13.761	+ 1,2%	+ 4,1%
Austria	3.154	3.247	+3,0%	+ 1,3%
Poland	12.481	12.759	+ 2,2%	+2,0%
Portugal	1.909	1.853	- 3,0%	-1,7%
Romania	1.126	1.134	+ 0,7%	+13,1%
Slovenia	589	575	- 2,3%	-3,0%
Slovakia	823	825	+ 0,2%	-0,5%
Finland	2.272	2.216	- 2,5%	-1,9%
Sweden	2.782	2.765	- 0,6%	+1,5%
EU-27	144.778	144.846	+ 0,0%	+1,1%

*) Provisional/ Estimate.

Sources: ZMB, national statistics.

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Table 4

Milk Output in different countries				
000 t	January-	2021	2022*	22:21*
U. Kingdom	Dec.	15.432	15.349	-0,5%
Switzerland	Dec.	3.405	3.333	-2,1%
Norway	Nov.	1.440	1.372	-4,8%
Serbia	Dec.	892	830	-6,9%
Europe without EU	cum.	21.170	20.883	-1,4%
Russia ¹⁾	Dec.	32.313	33.000	+2,1%
Belarus ¹⁾	Dec.	7.588	7.665	+1,0%
Kasachstan ¹⁾	Dec.	6.198	6.320	+2,0%
3 CIS countries	cum.	46.099	46.985	+1,9%
Canada	Nov.	8.950	8.936	-0,2%
USA ¹⁾	Dec.	102.631	102.795	+0,2%
Mexico	Dec.	13.253	13.476	+1,7%
North America	cum.	124.834	125.207	+0,3%
Argentina ¹⁾	Dec.	11.900	11.904	+0,0%
Brazil	Dec.	25.615	24.463	-4,2%
Chile	Dec.	2.337	2.275	-2,6%
Uruguay	Dec.	2.181	2.150	-1,5%
Peru	Nov.	2.010	2.068	+2,9%
South America	cum.	44.043	42.860	-2,7%
Australia ¹⁾	Dec.	9.067	8.455	-6,8%
New Zealand ¹⁾	Dec.	21.884	21.051	-3,8%
Oceania	cum.	30.951	29.506	-4,7%
Asian countries:				
Türkei	Dec.	10.052	9.752	-3,0%
Japan	Dec.	7.591	7.617	+0,3%

1) Milk production. *) Provisional/ Estimate.

Sources: ZMB, national statistics.

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Table 5

EU-27: Production of Dairy Products				
000 t	January - December			Dec.
	2021	2022*	22:21 *	22:21 *
Liquid milk	23.568	23.353	- 0,9%	- 1,6%
Cream	2.493	2.502	+ 0,3%	- 1,5%
Fermented Products	8.631	8.705	+ 0,9%	- 3,2%
Butter	2.110	2.105	- 0,2%	+ 5,7%
Cheese	9.418	9.385	- 0,3%	- 0,3%
WMP etc.	636	615	- 3,4%	+ 1,3%
SMP	1.488	1.532	+ 2,9%	+ 6,2%
Condensed milk	977	942	- 3,6%	- 7,4%

*) Provisional.

Sources: ZMB, Eurostat, national statistics.

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Table 6

EU Balance Sheet of Milk for Liquid Consumption					
'000 t	2019	2020	2021*	2022**	2023**
	EU28	EU-27	EU-27	EU27	EU27
Production	29.684	23.924	23.129	22.900	22.900
Imports	6	95	50	50	50
Exports	892	1.049	1.096	800	800
Sales	28.798	22.970	22.083	22.150	22.150
Per capita (kg)	56,1	51,3	49,4	49,1	48,9

*)Provisional **) Estimation/Forecast.

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

Updated February 2023

Source: ZMB

Table 7

EU Butter Balance Sheet					
'000 t	2019	2020	2021*	2022**	2023**
	EU28	EU-27	EU-27	EU27	EU27
Initial stocks	140	146	135	110	150
Total production	2.402	2.254	2.210	2.200	2.190
- in dairies ¹⁾	2.382	2.234	2.190	2.180	2.170
- on farms	20	20	20	20	20
Imports	15	52	50	75	80
- thereof from UK	.	47	40	45	45
Exports	218	320	260	245	240
- thereof to UK	.	79	50	70	70
Final stocks	160	135	110	150	140
thereof public stocks	0	0	0	0	0
Disappearance	2.180	1.997	2.025	1.990	2.040
Per capita (kg)	4,2	4,5	4,5	4,4	4,5

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

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

Updated February 2023

Source: ZMB

Table 8

EU Cheese Balance Sheet					
'000 t	2019	2020	2021*	2022**	2023**
	EU28	EU-27	EU-27	EU27	EU27
Production	10.690	10.407	10.560	10.540	10.590
- from cows' milk in dairies	9.710	9.427	9.570	9.550	9.600
- on farms	100	100	100	100	100
- from other milk	880	880	890	890	890
Imports	63	222	200	190	190
- thereof from UK	.	160	130	120	110
Processing addition ¹⁾	180	155	160	150	150
Available	10.933	10.784	10.920	10.880	10.930
Exports	880	1.402	1.390	1.340	1.370
- thereof to UK	.	493	430	420	400
Stock Change	-20	10	-20	30	0
Consumption	10.074	9.372	9.550	9.510	9.560
- per capita (kg)	19,6	21,0	21,4	21,1	21,1

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

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

Source: ZMB

Updated February 2023

Table 9

EU Balance Sheet of Whole Milk Powder					
'000 t	2019	2020	2021*	2022**	2023**
	EU28	EU-27	EU-27	EU27	EU27
Production	860	858	800	750	720
Imports	6	27	11	20	20
- thereof from UK	.	26	10	14	14
Exports	297	340	298	240	220
- thereof to UK	.	35	20	20	20
Change in stocks	50	20	0	30	10
Sales	518	525	513	500	510

*)Provisional **) Forecast.

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

Source: ZMB

Updated February 2023

Table 10

EU SMP Balance Sheet					
'000 t	2019	2020	2021*	2022**	2023**
	EU28	EU-27	EU-27	EU-27	EU-28
Opening stocks	442	213	148	56	106
Production	1.672	1.630	1.525	1.550	1.540
Imports	6	36	33	30	40
-thereof from UK	.	34	23	25	25
Available	2.120	1.879	1.706	1.636	1.686
Consumption	940	900	860	830	840
- other than feed	800	790	780	760	760
- in feed	140	110	80	70	80
Exports	962	831	790	700	750
-thereof to UK	.	28	15	10	10
Ending stocks	217	148	56	106	96
- in intervention	0	0	0	0	0

*)Provisional **) Forecast.

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

Updated February 2023

Source: ZMB

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	2.160
Imports	52	45	50	50
-thereof from UK	37	31	35	30
Exports	691	715	640	700
-thereof to UK	56	40	40	40
Stock change	-20	-30	40	-20
Consumption	1.506	1.540	1.530	1.530

Partly desugared and demineralised whey powder included.

*) Estimated. **) Forecast.

Source: ZMB

Updated February 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	185
Import	15	17	17	15
-thereof from UK	3	0	0	2
Exports	95	105	95	100
-thereof to UK	4	4	4	4
Stock change ²⁾	-2	-8	8	0
Consumption	99	102	98	100

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

2) Total stocks (manufacturers and users)

Updated February 2023

Source: ZMB

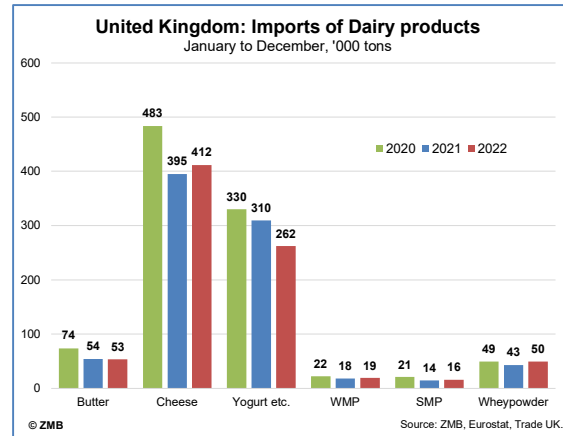
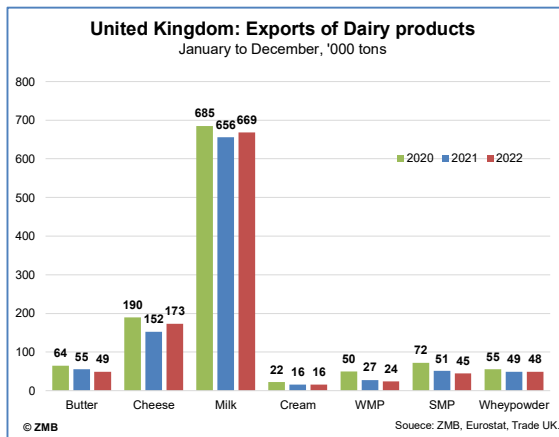
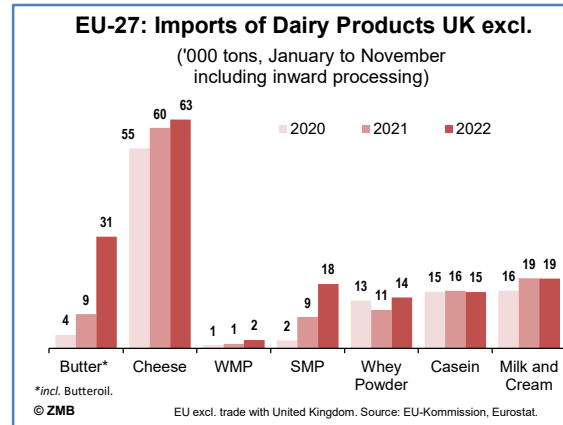
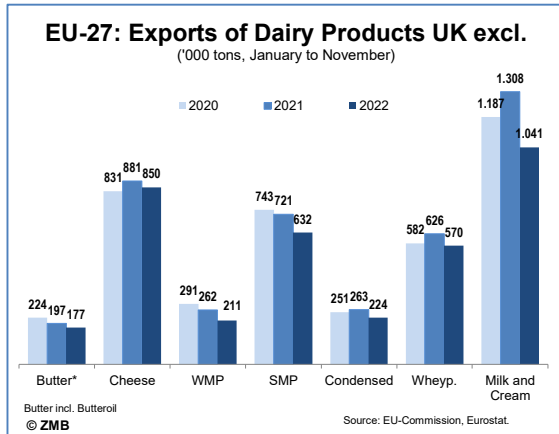


Table 13

EU: Exports of Butter <85%¹⁾

' 000 t	Months	2019	2020	2021	Months	2021	2022	2021	2022
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ³⁾	EU-27 ³⁾		
Belgium	12	13,9	18,1	12,4	11	10,7	9,1	1,1	2,9
Denmark	12	27,7	29,3	29,0	11	20,4	22,2	6,4	5,6
Germany	12	18,1	14,1	13,8	11	13,3	9,6	0,1	0,0
Spain	12	1,0	1,8	1,7	11	1,6	1,4	0,0	0,0
France	12	40,3	41,4	44,1	11	35,5	38,4	4,5	4,8
Ireland	12	97,2	97,7	78,5	11	45,9	37,9	26,1	39,9
Lithuania	12	1,9	4,8	1,1	11	1,0	2,4	0,0	0,0
Netherlands	12	30,9	31,8	27,3	11	23,6	18,0	0,4	1,1
Portugal	12	2,2	6,7	4,6	11	4,0	2,0	0,0	0,0
Poland	12	7,5	13,2	7,1	11	5,6	3,4	1,0	0,8
Finland	12	4,4	5,3	4,4	11	4,3	4,0	0,0	.
All other	12	2,5	4,1	3,4	11	3,0	2,2	0,1	0,1
EU	12	247,4	268,2	227,5	11	168,9	150,6	39,7	55,2

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

Sources: ZMB, EU-Comm./ EUROSTAT.

Table 14

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

' 000 t	Months	2019	2020	2021	Months	2021	2022	2021	2022
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ³⁾	EU-27 ³⁾		
Belgium	12	5,5	4,5	4,1	11	3,1	3,6	0,8	0,4
Spain	12	0,7	0,6	0,4	11	0,4	0,3	0,0	0,0
France	12	7,2	6,8	7,0	11	7,1	6,4	0,2	0,1
Ireland	12	9,2	4,9	4,2	11	0,4	0,4	3,6	4,3
Netherlands	12	18,6	19,0	11,9	11	9,8	9,1	1,6	1,4
Sweden	12	0,0	0,0	0,0	11	0,0	0,0	0,0	.
All other	12	2,6	2,2	2,5	11	2,6	2,1	0,3	0,0
EU	12	43,8	38,0	30,0	11	23,4	21,9	6,6	6,3

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

Sources: ZMB, EU-Comm./ EUROSTAT.

Table 15

EU: Imports of Butter and Butteroil¹⁾

' 000 t	Months	2019	2020	2021	Months	2021	2022	2021	2022
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ³⁾	EU-27 ³⁾		
Belgium	12	29,5	18,6	11,5	11	0,0	0,1	11,4	6,4
Denmark	12	5,6	2,8	2,8	11	5,9	11,4	0,5	0,1
France	12	6,9	3,9	7,3	11	2,0	3,9	6,3	8,1
Netherlands	12	10,3	8,4	11,2	11	1,0	8,4	9,7	15,8
All other	12	24,2	17,6	10,8	11	0,5	6,7	10,0	12,3
EU	12	76,6	51,3	43,5	11	9,4	30,5	37,8	42,8

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

Sources: ZMB, EU-Comm./ EUROSTAT.

Table 16

Exports of Butter and Butteroil

1.000 tonnes	Mon.	2020	2021	2022	± %
<i>EU - 27*</i>	<i>I - XI</i>	<i>224,2</i>	<i>197,0</i>	<i>176,9</i>	<i>- 10,2</i>
<i>United Kingdom</i>	<i>I - XII</i>	<i>64,2</i>	<i>55,1</i>	<i>48,6</i>	<i>- 11,9</i>
<i>- of which to EU-27</i>	<i>I - XII</i>	<i>53,9</i>	<i>48,3</i>	<i>46,5</i>	<i>- 3,7</i>
New Zealand	I - XI	378,1	348,6	396,4	+ 13,7
Australia	I - XI	13,8	18,7	13,3	- 29,0
USA	I - XII	26,9	59,7	85,0	+ 42,5
Switzerland	I - XI	0,3	0,1	0,0	..
Belarus	I - III	16,9	19,6	18,4	- 6,3
Argentina	I - XI	18,0	27,4	26,6	- 2,7
Uruguay	I - XII	13,7	12,4	16,8	+ 35,3
Türkei	I - IX	2,3	0,8	12,9	+ 1527,7
India	I - X	14,5	15,1	33,9	+ 124,2
Total amount*		718,9	706,3	782,2	+ 10,8

* Excluding trade between EU-27 and United Kingdom.

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

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Table 17
EU: Exports of Cheese¹⁾

' 000 t	Months	2019	2020	2021	Months	2021	2022	2021	2022
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ³⁾	EU-27 ³⁾		
Belgium	12	44,4	49,8	68,2	11	19,5	19,8	42,9	42,6
Bulgaria	12	7,9	8,4	10,3	11	7,8	7,7	1,5	1,7
Czech Rep.	12	5,6	5,1	8,5	11	6,8	5,0	0,9	0,6
Denmark	12	126,1	137,3	137,3	11	87,4	81,3	39,4	42,4
Greece	12	22,4	24,0	25,2	11	12,7	12,6	10,8	11,7
Spain	12	33,9	25,9	29,3	11	22,9	24,6	3,6	4,2
Germany	12	205,2	223,9	211,9	11	150,9	137,4	44,6	44,2
France	12	203,1	186,4	178,9	11	108,6	106,0	54,7	52,7
Ireland	12	207,5	203,2	163,9	11	64,7	56,0	87,9	75,5
Italy	12	149,8	147,2	161,4	11	110,6	118,5	36,1	37,6
Lithuania	12	16,0	17,2	17,1	11	15,2	10,6	0,5	0,4
Hungary	12	11,9	13,8	14,6	11	11,7	12,1	1,6	2,1
Netherlands	12	174,8	191,2	193,3	11	152,7	163,6	26,4	28,0
Austria	12	20,6	21,7	21,9	11	18,0	17,6	1,6	1,7
Poland	12	67,7	88,7	87,4	11	62,8	50,2	16,5	15,1
Finland	12	6,3	6,4	5,3	11	5,0	3,7	0,0	0,0
All other	12	44,5	51,3	50,7	11	23,3	22,7	23,0	28,9
EU	12	1.347,8	1.401,6	1.385,2	11	880,6	849,4	391,9	389,3

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

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 18
Exports of Cheese

1.000 tonnes	Mon.	2020	2021	2022	± %
EU - 27*	I - XI	831,1	880,6	849,4	- 3,5
United Kingdom	I - XII	189,6	152,3	173,4	+ 13,9
- of which to EU-27	I - XII	155,5	116,3	138,8	+ 19,3
Switzerland	I - XII	77,1	82,5	77,0	- 6,7
New Zealand	I - XI	288,9	326,1	305,5	- 6,3
Australia	I - XI	137,4	140,5	133,0	- 5,4
USA	I - XII	355,5	402,5	451,4	+ 12,2
Belarus	I - III	42,6	45,4	50,8	+ 12,0
Argentina	I - XI	60,4	68,2	72,5	+ 6,3
Uruguay	I - XII	27,5	26,0	23,5	- 9,6
Turkey	I - XI	49,6	36,6	43,9	+ 20,0
Total amount*		1.904,2	2.044,2	2.041,5	- 0,1

* Excluding trade between EU-27 and United Kingdom.

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

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Table 19

EU: Exports of Condensed and Evaporated Milk¹⁾

' 000 t	Months	2019	2020	2021	Months	2021	2022	2021	2022
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾	EU-27 ³⁾	EU-27 ³⁾	Export to UK	Export to UK	
Belgium	12	28,9	26,4	31,5	11	12,6	12,5	16,0	17,7
Germany	12	70,5	66,0	58,1	11	42,4	38,9	8,6	7,9
Spain	12	25,1	27,6	27,0	11	23,1	15,8	1,5	1,8
France	12	2,2	3,1	1,3	11	1,1	1,0	0,1	0,6
Litauen	12	8,1	11,8	15,5	11	13,7	5,6	0,5	0,5
Netherlands	12	189,7	193,6	197,2	11	163,3	147,3	15,3	12,2
Poland	12	4,0	4,7	3,1	11	1,0	0,7	1,9	0,9
<i>All other</i>	12	3,6	5,2	7,3	11	6,0	2,1	1,0	0,9
EU	12	332,1	338,3	340,9	11	263,2	223,9	44,9	42,5

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

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 20

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

' 000 t	Months	2019	2020	2021	Months	2021	2022	2021	2022
		EU-27 ³⁾	EU-27 ³⁾	EU-27 ³⁾	EU-27 ⁴⁾	EU-27 ⁴⁾	Export to UK	Export to UK	
Belgium	12	28,9	47,8	24,6	11	23,4	10,0	0,2	0,2
Czech Rep.	12	3,8	2,9	2,4	11	2,3	2,4	0,0	0,0
Denmark	12	46,7	43,3	48,6	11	44,7	34,0	0,0	0,0
Germany	12	17,2	19,2	13,8	11	11,6	25,7	1,1	1,3
France	12	35,1	39,9	42,7	11	31,2	25,3	7,5	4,7
Ireland	12	30,7	44,0	31,1	11	24,2	10,6	4,4	5,7
Netherlands	12	115,1	109,6	99,5	11	90,7	73,6	2,7	2,7
Poland	12	6,1	8,4	5,2	11	4,9	2,5	0,1	0,3
Sweden	12	18,1	19,4	20,4	11	19,6	20,1	0,0	0,0
<i>All other</i>	12	13,7	10,4	10,0	11	9,0	6,7	0,6	0,1
EU	12	315,4	344,8	298,4	11	261,6	210,9	16,7	15,1

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

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 21

Exports of Whole Milk Powder

1.000 tonnes	Mon.	2020	2021	2022	± %
EU - 27*	I - XI	291,0	261,6	210,9	- 19,4
United Kingdom	I - XII	49,5	27,3	24,2	- 11,4
- of which to EU-27	I - XII	32,3	9,4	16,4	+ 75,5
New Zealand	I - XI	1.346,5	1.431,2	1.192,3	- 16,7
Australia	I - XI	32,9	45,5	53,4	+ 17,4
USA	I - XII	38,5	39,1	38,7	- 1,2
Belarus	I - III	5,1	7,0	6,7	- 3,5
Argentina	I - XI	140,1	128,0	141,0	+ 10,1
Uruguay	I - XII	146,7	141,2	139,4	- 1,3
Total amount*		2.018,1	2.071,5	1.790,1	- 13,6

* Excluding trade between EU-27 and United Kingdom.

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

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Table 22

EU: Exports Skim Milk Powder¹⁾

' 000 t	Months	2019	2020	2021	Months	2021	2022	2021	2022
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ³⁾	EU-27 ³⁾	Export to UK	
Belgium	12	190,6	150,9	138,5	11	129,5	130,6	0,3	0,3
Czech Rep.	12	11,7	10,9	9,9	11	9,3	7,7	0,0	0,0
Denmark	12	17,0	12,4	7,9	11	7,0	4,6	.	.
Germany	12	168,5	142,7	116,8	11	109,3	75,4	0,3	0,3
Spain	12	19,3	10,6	12,6	11	11,0	2,5	0,0	0,0
France	12	172,9	158,5	165,0	11	148,6	113,4	2,2	1,5
Ireland	12	97,8	96,7	97,3	11	82,3	69,1	9,4	11,4
Latvia	12	1,0	0,5	0,4	11	0,2	0,1	0,0	.
Lithuania	12	20,8	18,3	13,6	11	12,9	13,8	.	0,0
Netherlands	12	100,4	85,2	79,6	11	72,8	86,8	0,6	0,3
Poland	12	84,8	80,4	71,8	11	68,9	68,2	0,0	0,0
Finland	12	31,3	36,4	37,0	11	34,8	31,7	.	0,0
Sweden	12	19,4	18,7	32,3	11	29,7	24,2	0,0	0,0
All other	12	9,9	8,9	5,3	11	4,8	4,1	0,1	0,2
EU	12	945,5	831,0	788,1	11	721,1	632,2	12,9	13,9

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

Sources: ZMB, EU-Comm./ EUROSTAT.

Table 23

Exports of Skim Milk Powder

1.000 tonnes	Mon.	2020	2021	2022	± %
EU - 27*	I - XI	742,6	721,1	632,2	- 12,3
United Kingdom	I - XII	72,0	50,7	44,7	- 12,0
- of which to EU-27	I - XII	46,1	26,2	17,2	- 34,2
New Zealand	I - XI	316,5	292,1	314,6	+ 7,7
Australia	I - XI	115,6	135,6	139,4	+ 2,7
USA	I - XII	810,2	881,4	827,3	- 6,1
Canada	I - XI	38,3	17,0	27,6	+ 62,9
Turkey	I - XI	16,8	55,8	44,6	- 20,1
Iran	I - X	.	40,4	72,3	+ 79,2
Belarus	I - III	26,1	28,3	27,7	- 2,3
Argentina	I - XI	24,9	19,6	25,9	+ 31,8
Uruguay	I - XII	20,8	19,6	25,9	+ 32,3
India	I - X	.	26,4	27,5	+ 4,0
Total amount*		2.140,4	2.261,9	2.192,4	- 3,1

* Excluding trade between EU-27 and United Kingdom.

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

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Table 24

EU: Exports of Whey Powder¹⁾

1.000 t	Months	2019	2020	2021	Months	2021	2022	2021	2022
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ²⁾		EU-27 ³⁾	EU-27 ³⁾		
Belgium	12	10,2	8,8	4,7	11	4,2	3,1	0,1	0,1
Czech Rep.	12	24,1	23,2	26,5	11	24,4	19,4	.	.
Denmark	12	10,0	10,3	8,0	11	7,1	9,5	.	0,0
Germany	12	114,1	112,2	120,9	11	107,7	107,9	5,8	5,9
Estonia	12	2,7	2,5	1,8	11	1,7	1,1	0,0	.
Spain	12	20,9	24,8	29,7	11	27,7	22,7	0,2	0,2
France	12	156,7	155,3	190,5	11	174,6	141,5	1,3	1,8
Ireland	12	74,5	82,2	80,6	11	48,8	47,2	25,6	27,9
Latvia	12	8,8	6,9	7,5	11	6,9	5,6	0,0	.
Lithuania	12	15,5	20,8	21,3	11	18,4	15,5	0,3	0,3
Netherlands	12	62,7	82,1	70,8	11	64,0	61,0	1,2	3,7
Austria	12	4,5	4,9	2,4	11	2,2	2,8	0,0	.
Poland	12	98,7	120,3	107,9	11	101,0	93,5	0,0	0,1
Finland	12	14,1	17,8	17,0	11	16,0	16,3	0,0	.
<i>Other</i>	12	20,6	20,2	25,2	11	21,2	22,5	1,3	0,8
EU	12	638,1	692,2	714,9	11	625,9	569,6	35,8	40,8

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

Source: ZMB, EU Commission, EUROSTAT - COMEXT.

Table 25

Exports of Whey Powder

tonnes	Mon.	2020	2021	2022	± %
EU - 27*	I - XI	581.717	625.939	569.572	- 9,0
United Kingdom	I - XII	55.398	48.953	48.189	- 1,6
- of which to EU-27	I - XII	40.587	34.317	36.521	+ 6,4
USA (Whey products)	I - XII	498.505	549.933	602.907	+ 9,6
- Whey Powder	I - XII	214.187	224.351	224.096	- 0,1
- WPC	I - XII	146.970	137.866	168.198	+ 22,0
- Mod Whey	I - XII	137.347	187.717	210.612	+ 12,2
Australia	I - XI	29.579	28.472	24.792	- 12,9
Argentina	I - XI	48.813	55.402	53.429	- 3,6
Canada	I - XI	67.433	60.009	63.341	+ 5,6
Turkey	I - XI	57.461	79.056	37.505	- 52,6
Total amount*		1.298.318	1.413.446	1.363.214	- 3,6

* Excluding trade between EU-27 and United Kingdom.

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

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Table 26

EU: Exports of Casein and Caseinates to 3rd countries

000 t	Months	2019	2020	2021	Months	2021	2022	2021	2022
		EU-27 ¹⁾	EU-27 ¹⁾	EU-27 ¹⁾		EU-27 ²⁾	EU-27 ²⁾		
Denmark	12	0,0	0,0	0,1	11	0,1	0,3	.	0,0
France	12	24,3	24,5	24,1	11	22,2	19,1	0,2	0,3
Netherlands	12	2,3*	2,7*	2,5*	11	2,2*	2,2*	0,1*	0,1*
Germany	12	13,3	11,8	14,3	11	12,1	10,2	0,2	0,2
Ireland	12	35,0	36,3	44,3	11	35,4	33,6	3,0	3,0
Poland	12	8,1	7,0	7,4	11	6,7	7,8	0,0	0,0
All other	12	5,4	4,5	6,4	11	3,6	3,2	0,1	0,0
EU-27¹⁾	12	88,4	86,8	99,1	11	82,3	76,4	3,5	3,7

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

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

Sources: ZMB, EU-Comm./EUROSTAT.

Table 27

Protein-Products-Production

000 t	January - December		
	2021	2022*	22:21 *
Casein, France	41,4	46,7	+ 12,9%
Casein, Ukraine ¹	0,2	0,5	+ 165,5%
MPC, USA	89,1	99,4	+ 11,5%
WPC, USA	230,9	237,3	+2,8%
WPI, USA	59,1	64,1	+8,4%
Laktose, USA	522,4	531,5	+1,7%

*) Provisional. 1) January to January.

Sources: ZMB, national statistics.

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Table 28

Imports of Casein and Caseinates

* 000 t	January to November				
	2019	2020	2021	2021	2022
EU-27 (Incl IP.)	19,2	18,5	17,1	15,9	15,5
USA²	68,8	66,4	75,0	74,9	104,6
- from					
total EU	37,6	36,1	38,7	38,7	63,8
- Ireland	15,8	15,6	15,4	15,4	35,0
- France	5,4	5,8	6,4	6,4	9,8
- Germany	2,1	1,1	1,2	1,2	1,1
- Netherlands	7,0	6,4	7,5	7,4	8,1
- Poland	4,1	3,0	3,3	3,3	4,1
- Other M. C.	3,3	4,2	4,9	4,9	5,6
India	2,1	0,7	2,2	2,2	4,8
New Zealand	24,6	23,7	27,0	27,0	27,0
Japan²	13,5	12,5	13,0	13,0	13,7
China	24,4	29,7	39,3	36,1	33,1
Mexico¹	22,9	19,8	23,6	13,9	12,1
South Korea	7,9	7,8	8,7	7,9	9,7
Malaysia¹	4,7	4,5	5,3	4,6	3,8
Thailand	5,5	5,9	5,3	4,9	5,3
Indonesia	8,7	9,6	9,8	8,6	8,8

1) January to October. 2) January to December.

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

Table 29

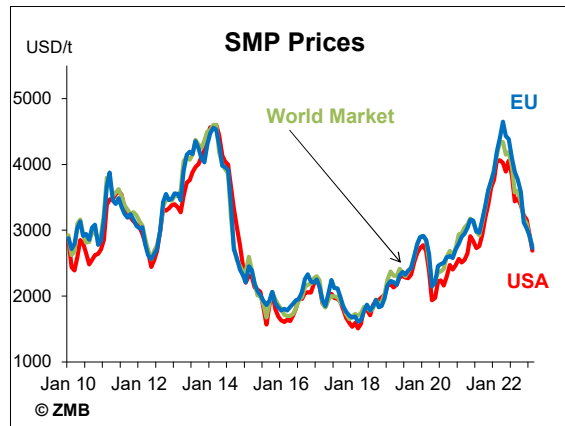
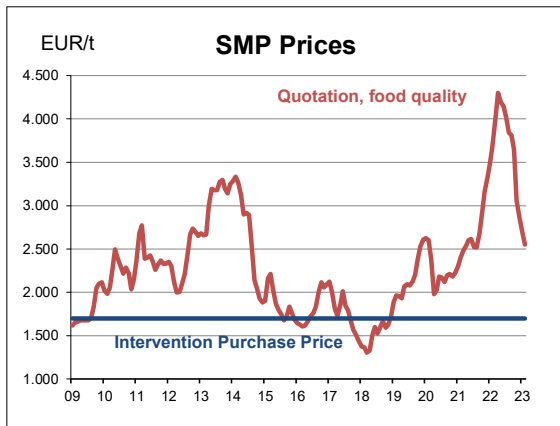
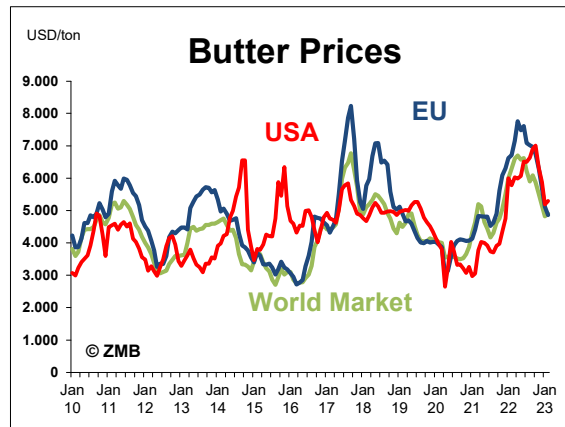
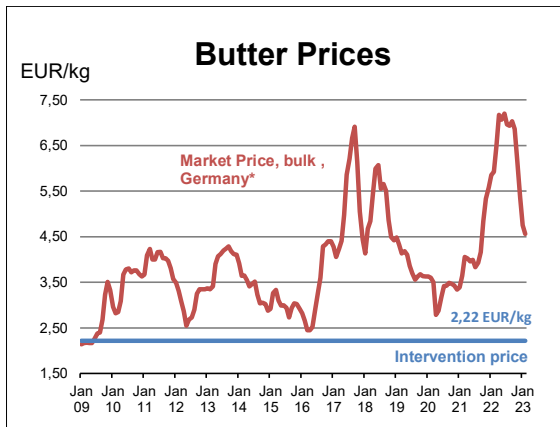
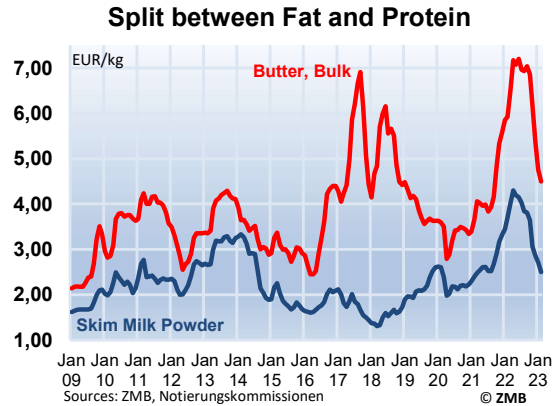
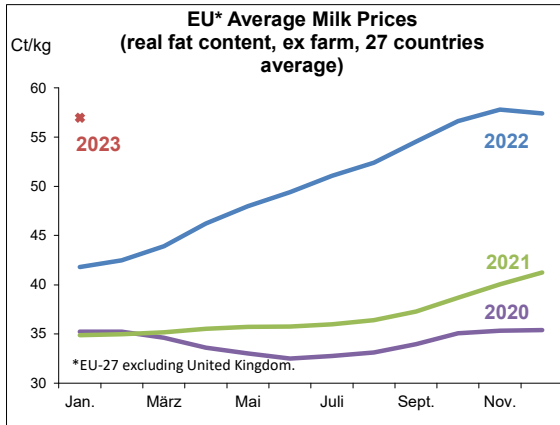
EU: Exports of Lactose¹⁾

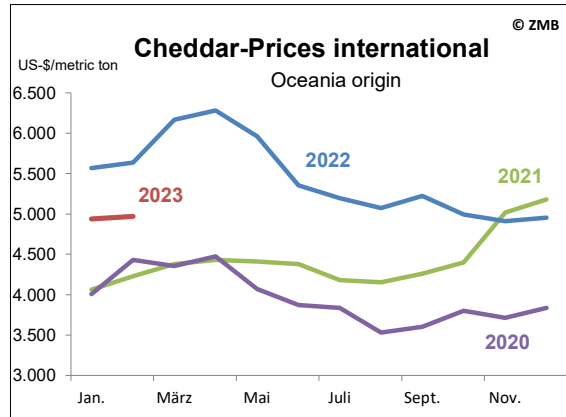
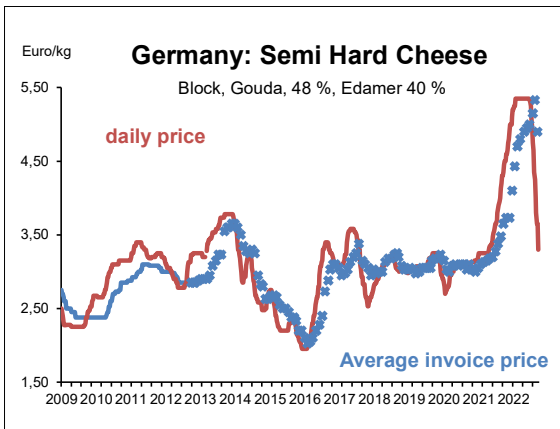
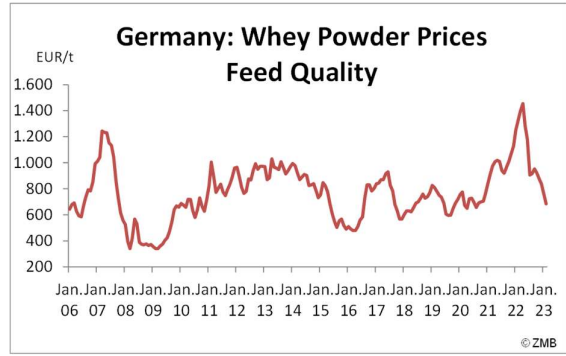
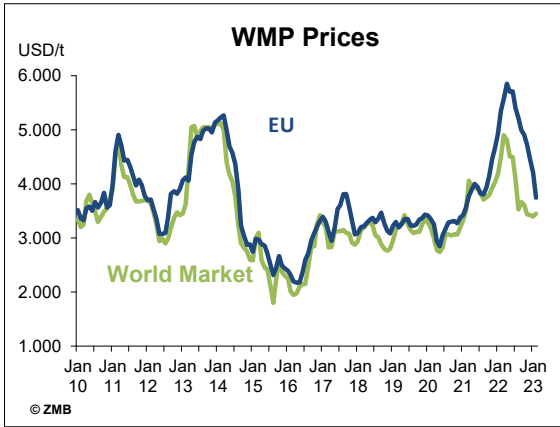
1.000 t	Months	2019	2020	2021	Months	2021	2022	2021	2022
		EU-27 ²⁾	EU-27 ²⁾	EU-27 ³⁾		EU-27 ³⁾	EU-27 ³⁾	Export to UK	
Germany	12	107,6	120,4	119,0	11	106,3	100,4	1,6	2,5
Ireland	12	0,7	2,7	0,6	11	0,4	0,4	0,2	0,0
France	12	23,3	31,7	27,9	11	23,4	18,7	2,3	2,6
Italy	12	13,5	18,1	19,8	11	18,2	16,4	0,0	0,0
Latvia	12	2,0	0,5	0,0	11	0,0	1,0	.	.
Lithuania	12	7,3	8,8	9,6	11	7,7	7,2	0,8	0,6
Austria	12	3,4	2,9	2,8	11	2,4	2,3	0,1	0,0
Netherlands	12	67,5	72,0	75,4	11	64,6	73,9	4,7	5,0
<i>Other</i>	12	16,2	31,7	20,2	11	20,2	15,1	0,0	0,1
EU	12	241,5	288,7	276,5	11	243,2	235,4	9,6	10,7

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

to access the Commission's reports



MARKET INFORMATION

Production & Internal Measures

Please follow

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

to access the Commission's reports



MARKET INFORMATION

Trade

Please follow

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

to access the Commission's reports



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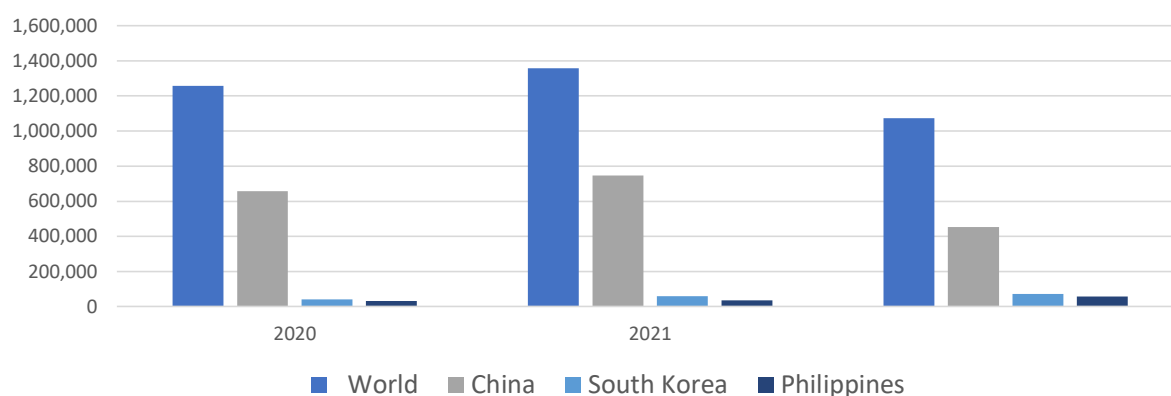
TRADE DATA MONITOR (TDM)

EU27 + UK Exports to World

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

Year to Date: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	1,258,327	1,358,569	1,073,897	100%	100%	100%	-21%
China	T	657,160	745,628	453,477	52%	55%	42%	-39%
South Korea	T	41,063	58,270	71,398	3%	4%	7%	23%
Philippines	T	32,157	34,269	56,636	3%	3%	5%	65%

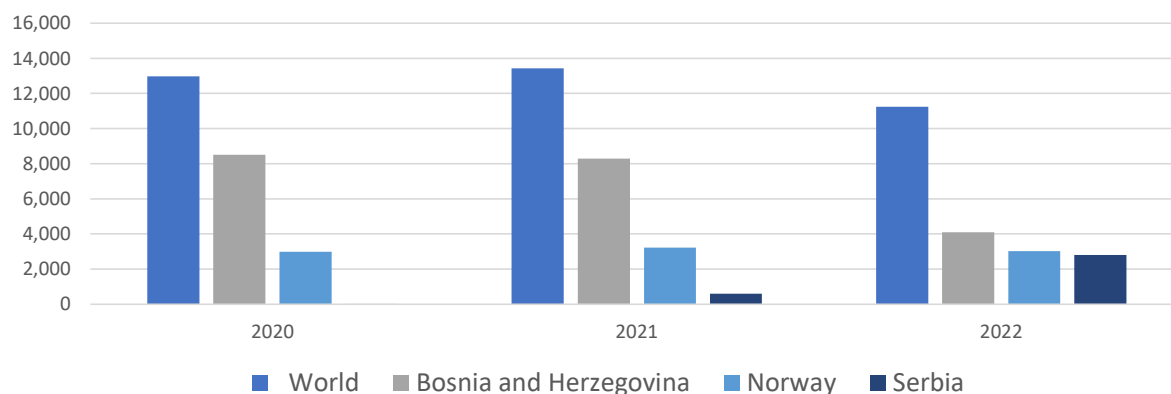


EU27 + UK Imports from World

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

Year to Date: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	12,979	13,428	11,257	100%	100%	100%	-16%
Bosnia and Herzegovina	T	8,510	8,299	4,104	66%	62%	36%	-51%
Norway	T	2,990	3,239	3,028	23%	24%	27%	-7%
Serbia	T	27	612	2,800	0%	5%	25%	358%

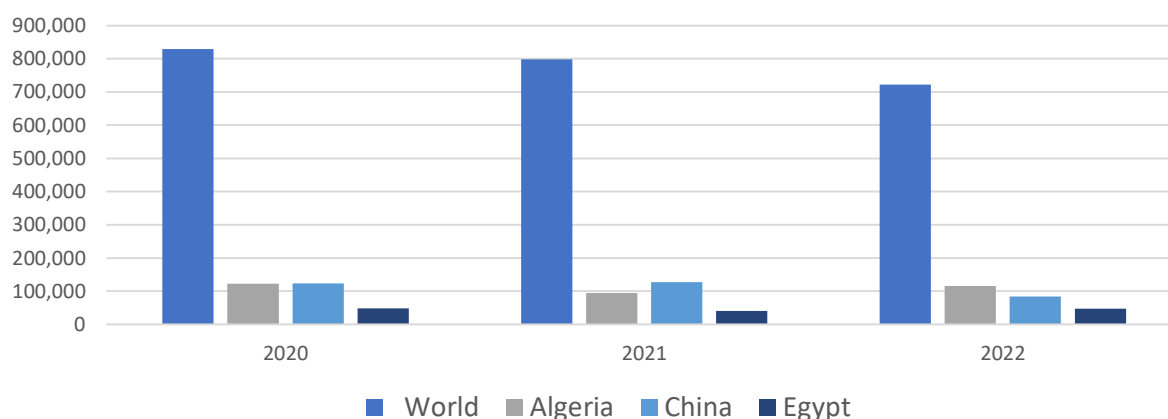


EU27 + UK Exports to World

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: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	829,024	798,392	722,293	100%	100%	100%	-10%
Algeria	T	122,369	94,377	115,692	15%	12%	16%	23%
China	T	123,687	127,356	84,112	15%	16%	12%	-34%
Egypt	T	48,257	40,947	46,899	6%	5%	6%	15%

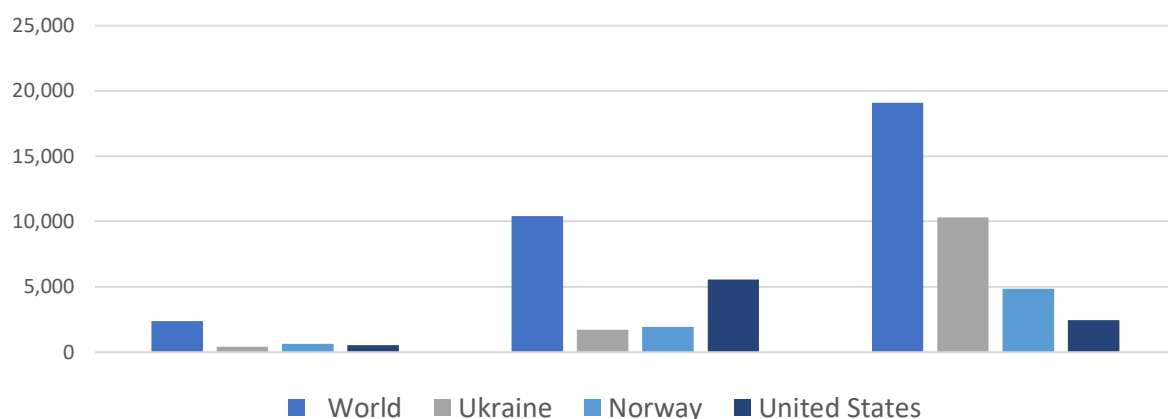


EU27 + UK Imports from World

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: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	2,383	10,426	19,078	100%	100%	100%	83%
Ukraine	T	420	1,707	10,312	18%	16%	54%	504%
Norway	T	629	1,928	4,850	26%	18%	25%	152%
United States	T	524	5,567	2,450	22%	53%	13%	-56%

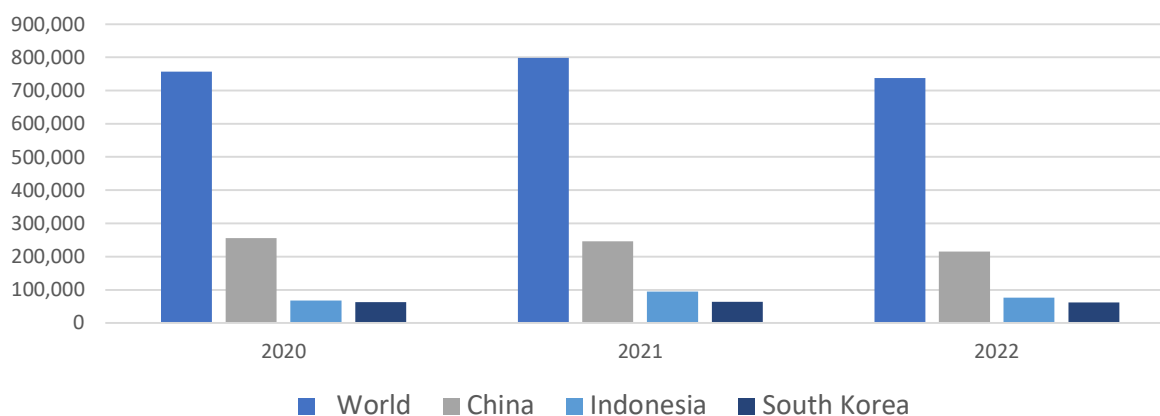


EU27 + UK Exports to World

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

Year to Date: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	756,872	797,865	738,209	100%	100%	100%	-7%
China	T	255,244	246,174	215,086	34%	31%	29%	-13%
Indonesia	T	67,844	93,939	75,965	9%	12%	10%	-19%
South Korea	T	62,541	64,111	61,651	8%	8%	8%	-4%

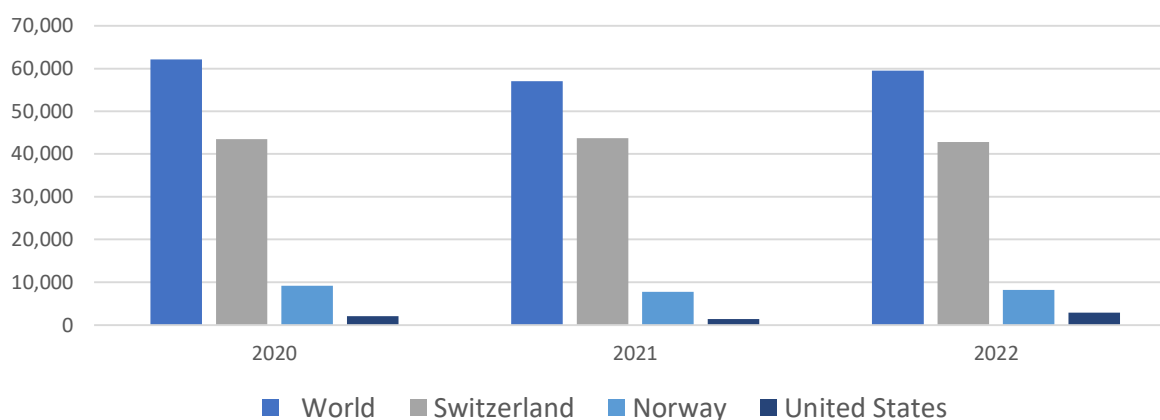


EU27 + UK Imports from World

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

Year to Date: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	62,139	57,083	59,504	100%	100%	100%	4%
Switzerland	T	43,482	43,673	42,767	70%	77%	72%	-2%
Norway	T	9,156	7,788	8,215	15%	14%	14%	5%
United States	T	2,060	1,398	2,875	3%	2%	5%	106%

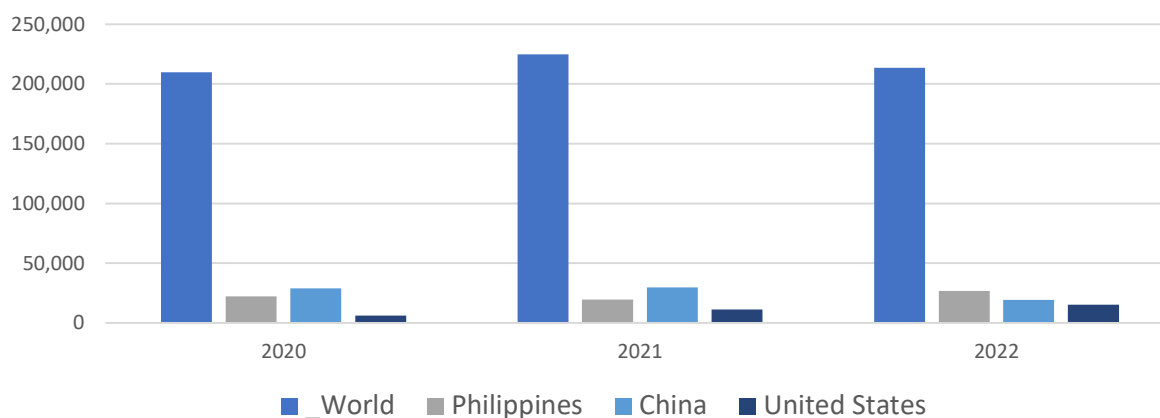


EU27 + UK Exports to World

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: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	209,621	224,678	213,427	100%	100%	100%	-5%
Philippines	T	22,200	19,428	26,631	11%	9%	12%	37%
China	T	29,031	29,649	19,096	14%	13%	9%	-36%
United States	T	6,329	11,130	15,127	3%	5%	7%	36%

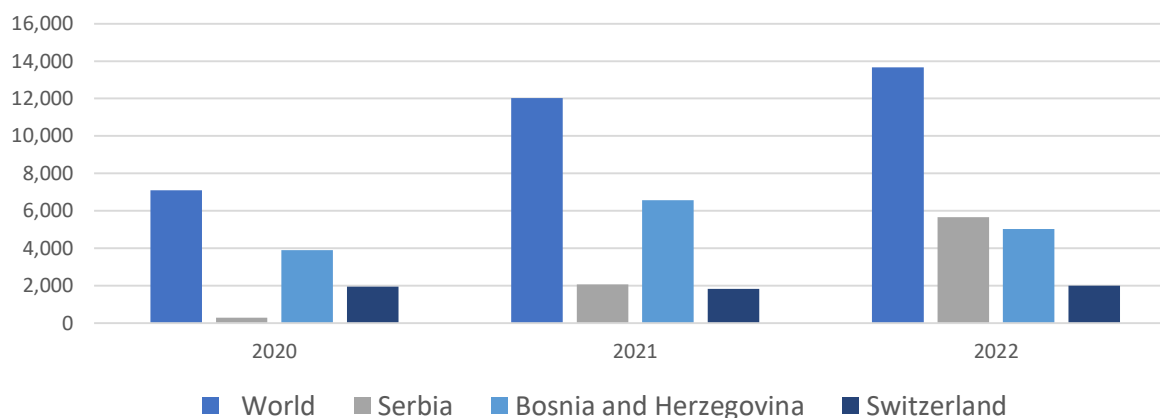


EU27 + UK Imports from World

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: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	7,085	12,024	13,661	100%	100%	100%	14%
Serbia	T	271	2,060	5,657	4%	17%	41%	175%
Bosnia and Herzegovina	T	3,882	6,562	5,014	55%	55%	37%	-24%
Switzerland	T	1,945	1,822	1,989	27%	15%	15%	9%

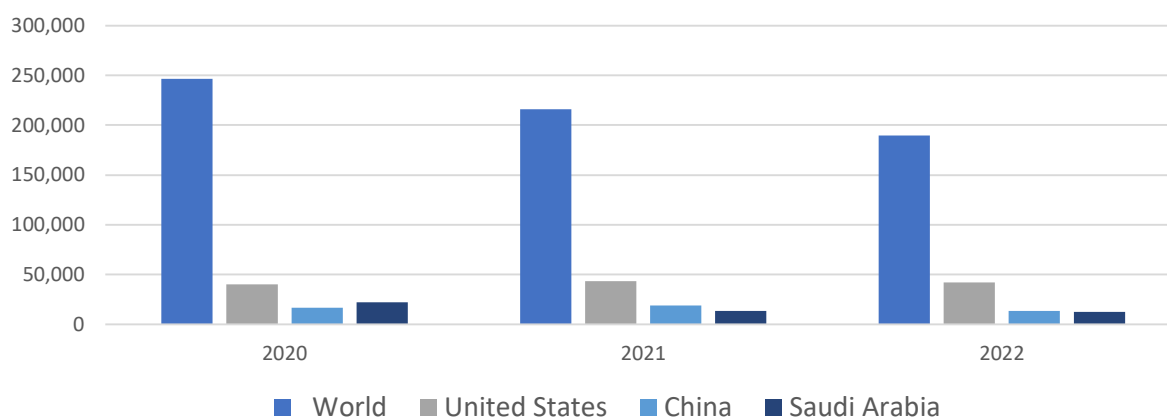


EU27 + UK Exports to World

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

Year to Date: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	246,422	216,072	189,647	100%	100%	100%	-12%
United States	T	40,292	43,667	41,965	16%	20%	22%	-4%
China	T	16,633	19,050	13,722	7%	9%	7%	-28%
Saudi Arabia	T	22,220	13,510	12,424	9%	6%	7%	-8%

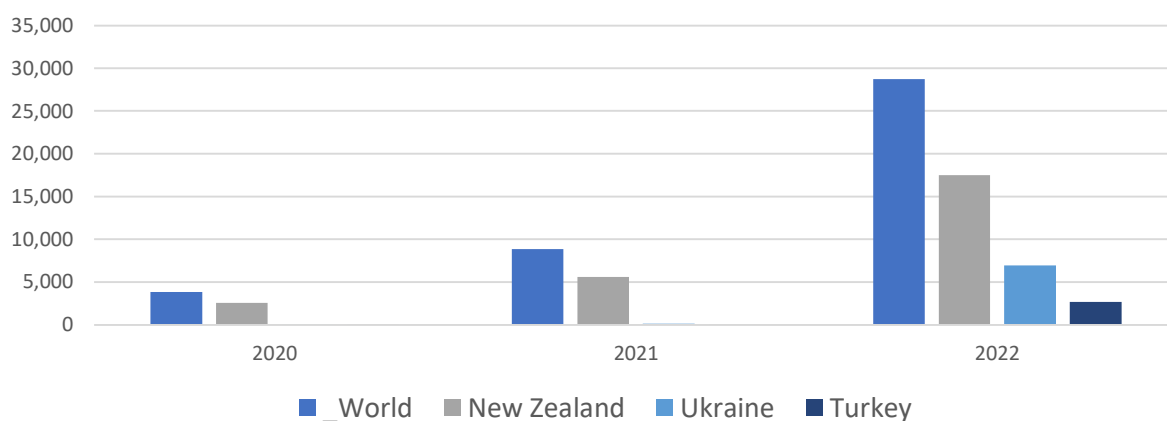


EU27 + UK Imports from World

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

Year to Date: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	3,839	8,856	28,739	100%	100%	100%	225%
New Zealand	T	2,574	5,592	17,481	67%	63%	61%	213%
Ukraine	T	5	132	6,945	0%	1%	24%	5161%
Turkey	T	12	17	2,664	0%	0%	9%	15571%

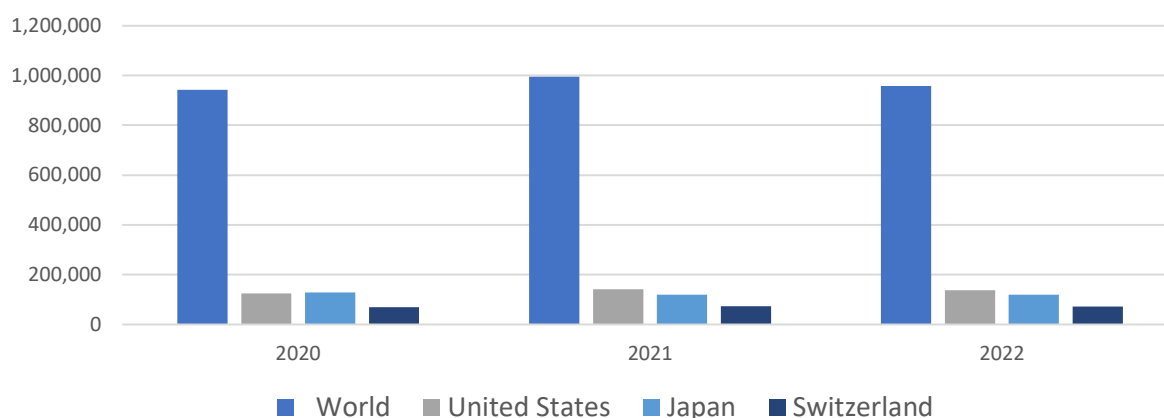


EU27 + UK Exports to World

Commodity: 0406, Cheese and Curd (in tonnes)

Year to Date: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	942,624	995,870	958,115	100%	100%	100%	-4%
United States	T	125,304	142,257	138,492	13%	14%	14%	-3%
Japan	T	128,461	118,743	120,113	14%	12%	13%	1%
Switzerland	T	69,761	73,537	71,974	7%	7%	8%	-2%

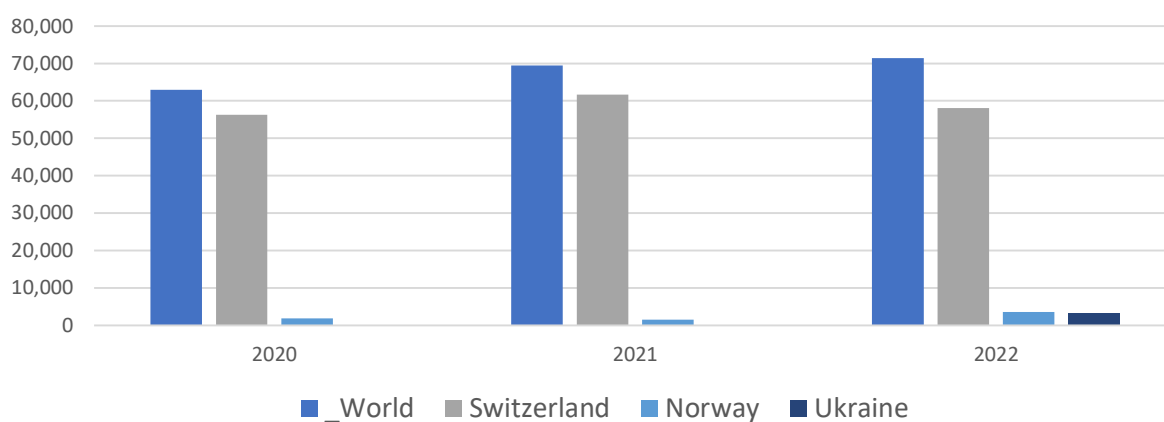


EU27 + UK Imports from World

Commodity: 0406, Cheese and Curd (in tonnes)

Year to Date: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	63,007	69,422	71,404	100%	100%	100%	3%
Switzerland	T	56,271	61,607	58,049	89%	89%	81%	-6%
Norway	T	1,830	1,529	3,510	3%	2%	5%	130%
Ukraine	T	0	0	3,245	0%	0%	5%	Calculation not possible

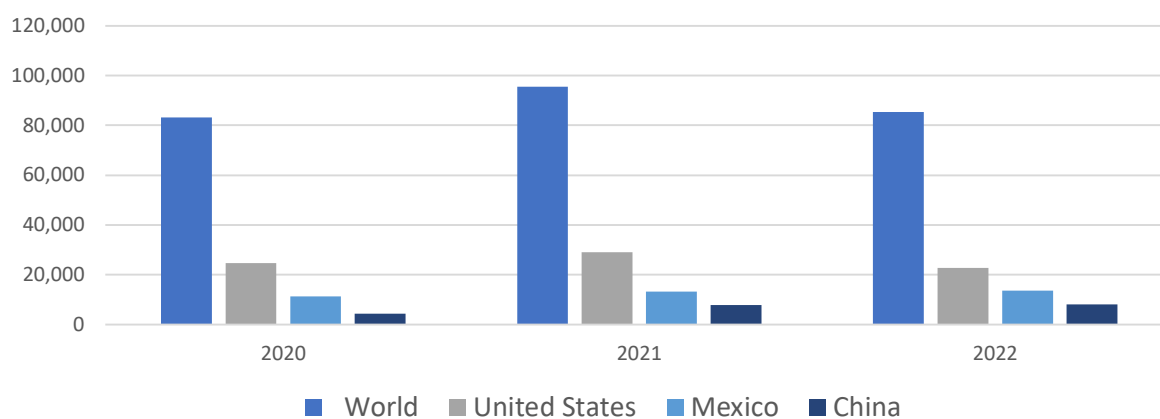


EU27 + UK Exports to World

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

Year to Date: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	83,114	95,413	85,400	100%	100%	100%	-10%
United States	T	24,698	28,950	22,812	30%	30%	27%	-21%
Mexico	T	11,345	13,195	13,739	14%	14%	16%	4%
China	T	4,407	7,882	8,131	5%	8%	10%	3%

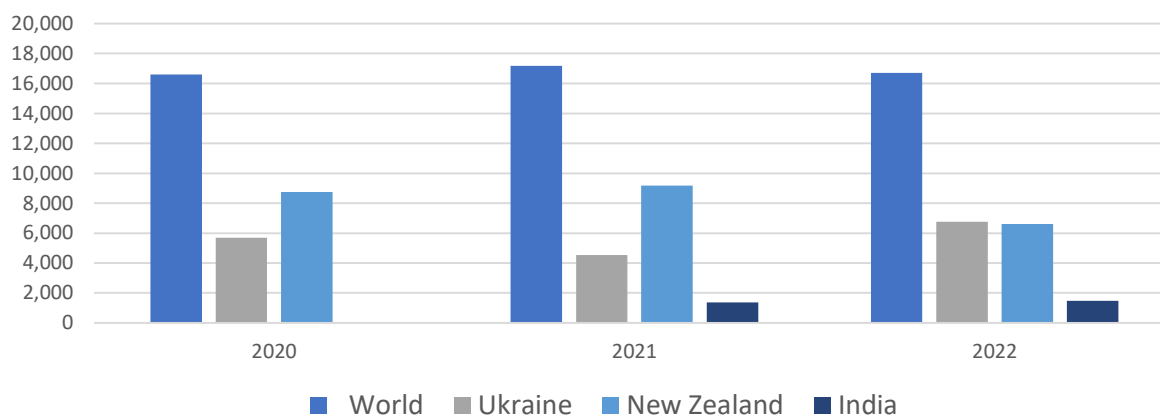


EU27 + UK Imports from World

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

Year to Date: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	16,592	17,174	16,702	100%	100%	100%	-3%
Ukraine	T	5,668	4,513	6,751	34%	26%	40%	50%
New Zealand	T	8,741	9,169	6,604	53%	53%	40%	-28%
India	T	0	1,352	1,472	0%	8%	9%	9%

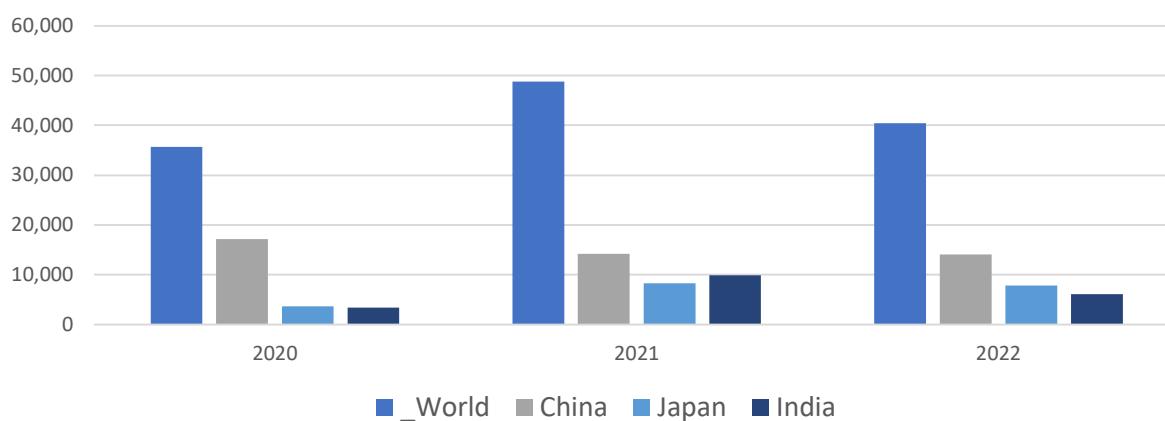


EU27 + UK Exports to World

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

Year to Date: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	35,643	48,819	40,460	100%	100%	100%	-17%
China	T	17,180	14,231	14,068	48%	29%	35%	-1%
Japan	T	3,671	8,299	7,877	10%	17%	19%	-5%
India	T	3,423	9,895	6,164	10%	20%	15%	-38%

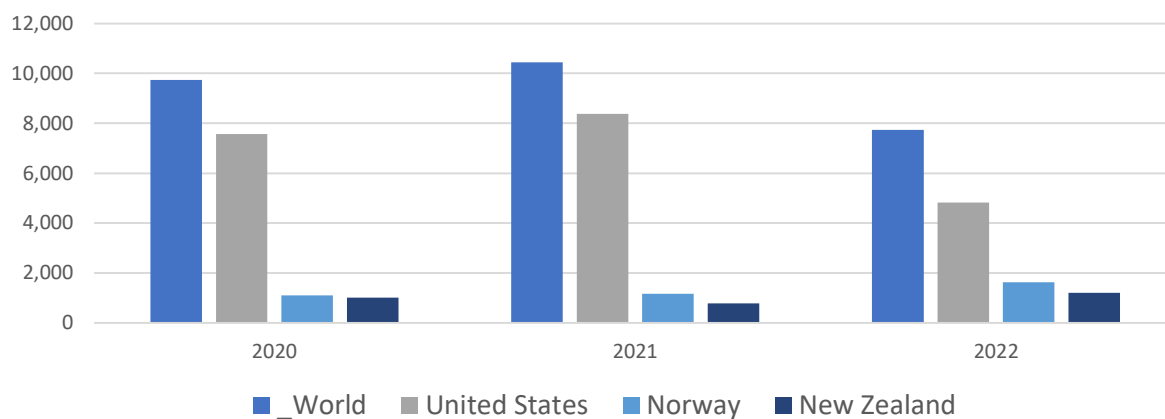


EU27 + UK Imports from World

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

Year to Date: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	9,739	10,448	7,733	100%	100%	100%	-26%
United States	T	7,566	8,377	4,827	78%	80%	62%	-42%
Norway	T	1,102	1,165	1,630	11%	11%	21%	40%
New Zealand	T	1,007	776	1,201	10%	7%	16%	55%

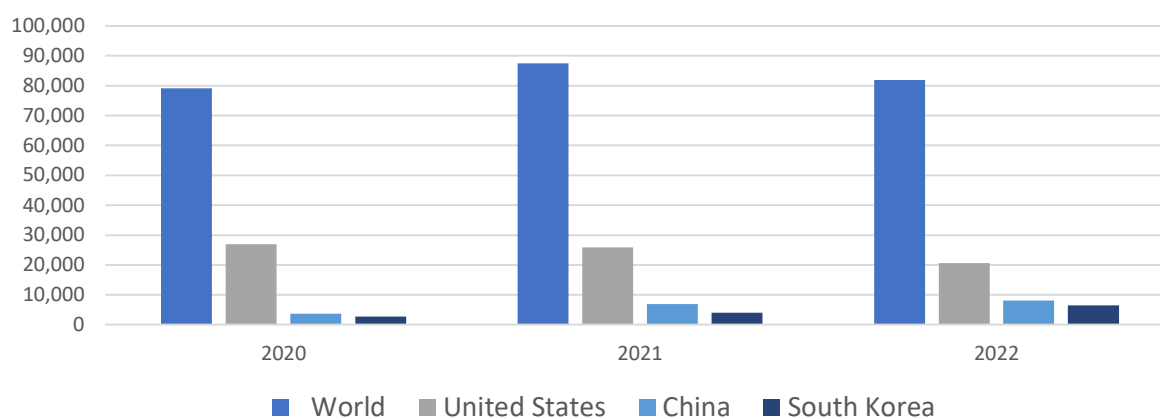


EU27 + UK Exports to World

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

Year to Date: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	79,053	87,388	81,851	100%	100%	100%	-6%
United States	T	26,901	25,840	20,551	34%	30%	25%	-20%
China	T	3,686	6,808	8,008	5%	8%	10%	18%
South Korea	T	2,629	3,957	6,489	3%	5%	8%	64%

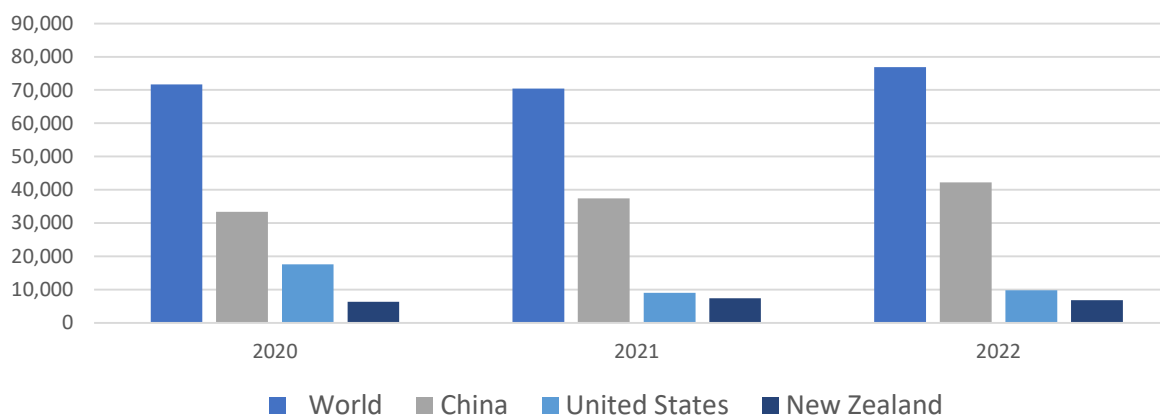


EU27 + UK Imports from World

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

Year to Date: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	71,752	70,450	76,887	100%	100%	100%	9%
China	T	33,456	37,430	42,170	47%	53%	55%	13%
United States	T	17,597	9,047	9,776	25%	13%	13%	8%
New Zealand	T	6,296	7,327	6,820	9%	10%	9%	-7%

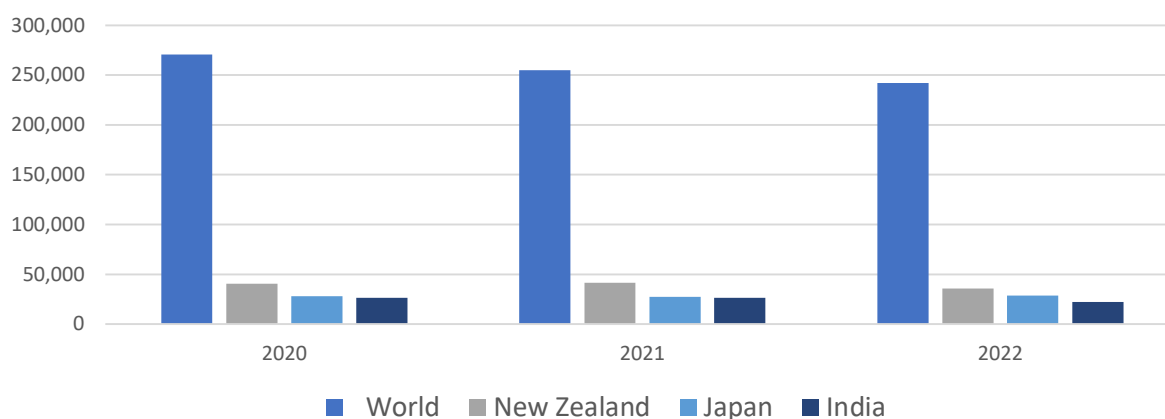


EU27 + UK Exports to World

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: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	270,604	254,867	242,177	100%	100%	100%	-5%
New Zealand	T	40,402	41,699	35,800	15%	16%	15%	-14%
Japan	T	27,797	27,331	28,474	10%	11%	12%	4%
India	T	26,264	26,318	22,284	10%	10%	9%	-15%

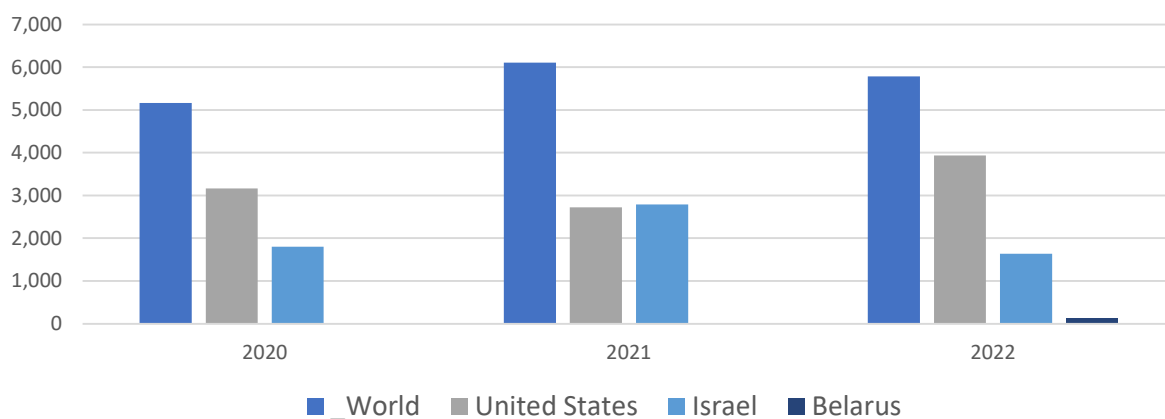


EU27 + UK Imports from World

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: December, 2020 - 2022

Partner		2020	2021	2022	2020	2021	2022	%Δ 2022/21
_World	T	5,168	6,108	5,783	100%	100%	100%	-5%
United States	T	3,167	2,718	3,938	61%	44%	68%	45%
Israel	T	1,800	2,793	1,636	35%	46%	28%	-41%
Belarus	T	0	0	120	0%	0%	2%	Calculation not possible



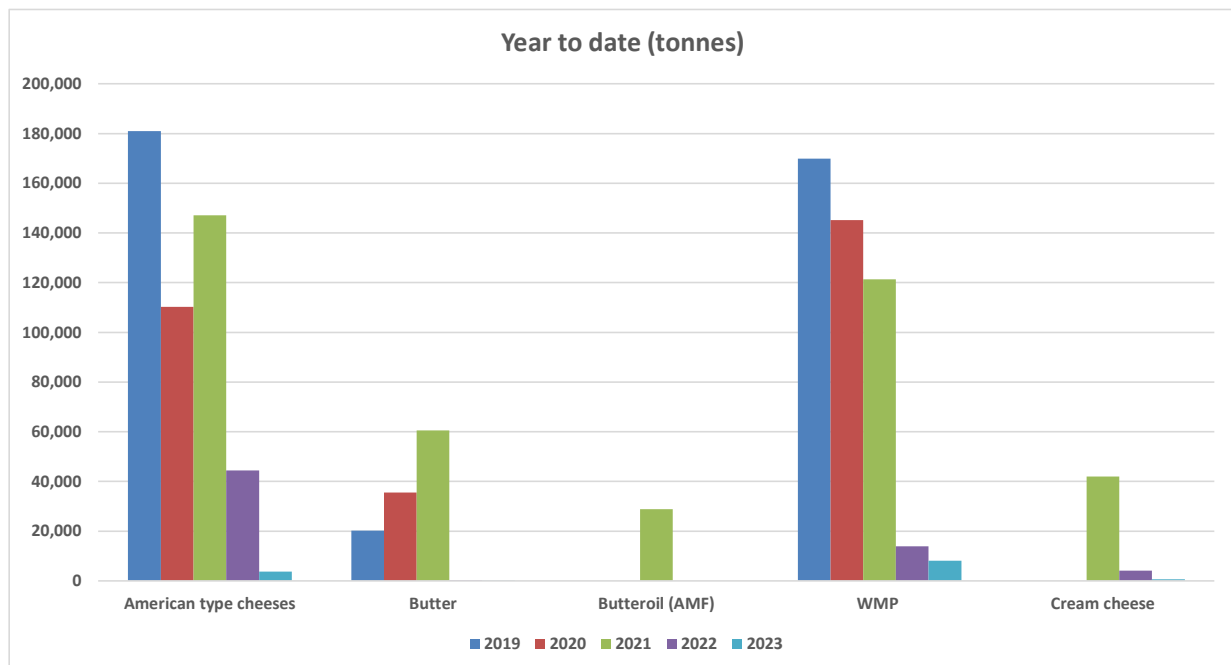


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CWT EXPORT SUBSIDIES

CWT exports subsidies - Last update: 14 February 2023

YEAR to date (tonnes)	2019	2020	2021	2022	2023
American type cheeses	180,929	110,232	147,038	44,452	3,765
Butter	20,161	35,552	60,520	298	23
Butteroil (AMF)	0	0	28,757	0	0
WMP	169,934	145,100	121,305	13,925	8,074
Cream cheese	0	0	41,998	3,992	544



Please note that CWT's historic data is no longer available. Therefore, we will now report the data as "year to date"



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IMPORTANT UPCOMING EVENTS



Important upcoming events 2023

Date	Event	Jurisdiction
2023 Jan - Jun	Swedish Presidency	EU
2023 Mar	EDA Dairy Policy Conference, Brussels, March 8, 2023	EU
2023 April	ADPI Annual Conference, Chicago, April 23 - 25, 2023	Global
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 8 MARCH 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-Dec 2022 / Jan-Dec 2021	What are your expectations for deliveries in Q1/23 compared to Q1/22?	What are your expectations for deliveries in Q2/23 compared to Q2/22?
+ 2,8 %	(deliveries)	(deliveries)
Milk price evolution		What are your expectations for prices in Q1/23 compared to Q1/22?
Current milk price: 58.14 Cent/kg (milk with 4.0 % fat, 3.4 % protein, all qualities, without tax, ex farm)	December 22 / December 21 : + 27.6 %	(prices)

➔ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc.)
	Jan-Dec 2022/ Jan-Dec 2021	Expectations Q1/23 compared to Q1/22 (+ / - / stable)	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Feb 23 / Feb 22	Expectations Q1/23 compared to Q4/22 (+ / - / stable)	
SMP	+ 44.5 %			- 30 %		
WMP	+ 135%			- 25 %		production at a low level
CHEESE	+ 3.8 %			0 to + 10 %		
BUTTER	- 6.2 %			+ 5 %		
WHEY	- 58.5 %			- 35 %		



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: Q4 2022 – Q1 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

In contrast to most other EU countries, milk collection in Austria was 2.9% above the previous year. The strongest growth rates were recorded in the first half of the year and in every month the delivery level was around the previous year's value. The collection of organic milk decreased (- 1.3 %) and therefore the share in the total collection fell from 19.4 % in 2021 to 19.1 % in 2022.

Dairy exports increased by 24.5% in value in the period from January to November 2022 compared to the same period of the previous year; imports increased by 28.5%. The increase was largely caused by higher prices, but there were also increases in volume (especially for cheese).

Animal welfare and origin-labelling are becoming increasingly important in Austria.

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2023)**
(Trends, industrial changes, policy changes, market expectations)

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (1ST 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 8 MARCH 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-Dec 2022 / Jan-Dec 2021	What are your expectations for deliveries in Q1/23 compared to Q1/22?	What are your expectations for deliveries in Q2/23 compared to Q2/22?
4.320 mio liters	+ (deliveries)	= (deliveries)
Milk price evolution		What are your expectations for prices in Q1/23 compared to Q1/22?
Current milk price: €55,2/100l	January 22 / January 21: +19%	Small + (prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc.)
	Jan-June 2022/ Jan-June 2021	Expectations Q1/23 compared to Q1/22 (+ / - / stable)	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Feb 23 / Feb 22 (week 5-8)	Expectations Q1/23 compared to Q4/22 (+ / - / stable)	
SMP	+12,8%			-12,4%		
WMP	%			-19,3%		
CHEESE	-16,4% (Gouda) +7,4% (IT cheese)			%		
BUTTER	%			-21,8%		
WHEY	%			%		



- ➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: Q4 2022 – Q1 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

- ➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

- ➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (1ST 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 8 MARCH 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-Dec 2022 / Jan-Dec 2021	What are your expectations for deliveries in Q1/23 compared to Q1/22?	What are your expectations for deliveries in Q2/23 compared to Q2/22?
+ 0,8 %	stable (deliveries)	Moderate increase (deliveries)
Milk price evolution		What are your expectations for prices in Q1/23 compared to Q1/22? still +20 %
Current milk price: 54,8 ct / January	January 22 / January 21: +31,5 %	Decrease since February: -10% in 1Q (prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc.)
	Jan-Dec 2022/ Jan-Dec 2021	Expectations Q1/23 compared to Q1/22 (+ / - / stable)	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Feb 23 / Feb 22	Expectations Q1/23 compared to Q4/22 (+ / - / stable)	
SMP	-10,3%	stable	+	-17,5 %	stable	stock growth
WMP	+0,1%	stable	+	+ 14,0 %	-	
CHEESE	Natural -1,1 % Processed +1,4 %	-	stable	Gouda +24,2% Edam +26,1 %	-	
BUTTER	-2,5 %	stable	stable	250g -4,3 % Block -24,6 %	-	stock growth
WHEY	Powder +1,8 % Evaporated +2,2 %	-	stable	-33,4 %	stable	



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: Q4 2022 – Q1 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Development of other dairy products for period **2022 compared y/y**:
Decrease in most fresh dairy categories with the exception of sour drinks and curd
Reason: decrease of consumer purchase power due to difficult economic situation.

- Liquid milk: + 7,6 %, from that fresh milk + 2,7 %, UHT + 8,9 %
- Cream: -1,8 %
- Yoghurt: - 4,3 %; other fermented milk products + 9,2 %
- Dairy spreads: - 8,3 %
- Curd: + 4,3 %

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

Farmers continue to push for high milk prices in view of the growth of many cost inputs, but also because milk prices in neighbouring countries (Germany, Poland, Austria) are much higher than here. In the month of January, there was only a slight reduction in price due to lower fat and protein content. However, from the month of February, taking into account the current situation in the whole of Europe, a gradual drop in prices is expected, which may be -15 to -17% until the end of the spring season.

- Energy prices remain the main problem in the manufacturing industry. The intervention of the state in their capping took place only at the end of the year, especially small processors have big problems. The costs of cardboard and plastic packaging remain very high, which is also reflected in the prices of the products.

High product prices persist, which affects the purchasing power of the population and has also led to a weakening of sales since the beginning of this year. The state has launched an investigation into the prices of selected basic foods (milk and butter included) in the entire supply chain, starting with primary production, through the processor to the trade, and is focusing on the distribution of margins in the pricing policy.

Marketers come up with various business tricks, for example, in price promotions, they offer products in reduced (non-traditional) weight to evoke a large price reduction and attract consumer interest. This was particularly evident in the case of butter, where consumer interest in buying it dropped significantly after Christmas.

- All this has an effect on the growth of inflation, which in February reached the historically highest level of 19.1%. Nevertheless, food manufacturers warn that, despite the fall in the price of raw milk, there will probably not be a big drop in prices in the first half of the year.

All this can also affect the development of consumption and, of course, the reduction of manufacturers' sales.

- The situation with the number of Ukrainian refugees remains approximately the same. There are now a little over 300,000 refugees in the Czech Republic, mainly women and children, and we have about 60,000 Ukrainian pupils in schools.



➔ NATIONAL DAIRY OUTLOOK MEDIUM TERM (1ST 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 only 8-10%.

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:

see above

MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 8 MARCH 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-Dec 2022 / Jan-Dec 2021	What are your expectations for deliveries in Q1/23 compared to Q1/22?	What are your expectations for deliveries in Q2/23 compared to Q2/22?
+0,0%	+ (deliveries)	+ (deliveries)
Milk price evolution		What are your expectations for prices in Q1/23 compared to Q1/22?
Current milk price: 59,81	December 22 / December 21: +48,1 %	+ (prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Dec 2022/ Jan-Dec 2021	Expectations Q1/23 compared to Q1/22 (+ / - / stable)	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Jan 23 / Jan 22	Expectations Q1/23 compared to Q4/22 (+ / - / stable)	(Including stocks, consumption, etc.)
SMP	-0,4%	+	+	-30,2%	-	
WMP	+11,6%	-	-	-10,5%	-	
CHEESE	-1,3%	stable	stable	-1,4%	-	
BUTTER	+0,3%	+	+	-18,8%	-	
WHEY	+0,2%	stable	-	-39,0%	-	



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: Q4 2022 – Q1 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Market sentiment changed heavily in this period. Supply was more than sufficient in the low season of milk deliveries. Consumer buying in retail normalized back or below the normal in pre-covid-times and inflation took its toll on dairy consumption. Export business was slow due to record-high prices. Domestic policy is still active on introducing a government-own model of animal-welfare-labelling. Another project are fair prices. Inflation in Germany smoothed, but was still high in January with 8,7 %. Energy markets relaxed to a certain extent.

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2023)**
(Trends, industrial changes, policy changes, market expectations)

With partly reduced prices of dairy products consumption could recover, but not back to pre-covid-levels. After strong reductions of farmgate-milk-prices milk deliveries will moderate.

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (1ST HALF 2023)**

Expected evolution in milk supply (+/-?): stable in average
Production trends for main products: cheese production will increase, liquid milk, butter and SMP stable
Consumption trends: stable
Exports (+/- and why?): will improve with lower prices
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:

Internal consumption is stabilized by refugees coming from Ukraine. The war has further impact on costs of production due to higher costs for energy, feed and other stuff. Costs smoothed, but the impact is still important. Imports (duty-free) of butter and SMP have limited impact on prices.

MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 8 MARCH 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-Dec 2022 / Jan-Dec 2021	What are your expectations for deliveries in Q1/23 compared to Q1/22?	What are your expectations for deliveries in Q2/23 compared to Q2/22?
+0,4%	0 - 2% (deliveries)	-1% - +2% (deliveries)
Milk price evolution		What are your expectations for prices in Q1/23 compared to Q1/22?
Current milk price: 57 EUR/100kg	January 23 / January 22: +38%	+25-30% (prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc.)
	Jan-Dec 2022/ Jan-Dec 2021	Expectations Q1/23 compared to Q1/22 (+ / - / stable)	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Feb 23 / Feb 22	Expectations Q1/23 compared to Q4/22 (+ / - / stable)	
SMP	-7%%			%		
WMP	-21%%			%		
CHEESE	+3%%			%		
BUTTER	+5%%			%		
WHEY	%			%		



- **NATIONAL DAIRY MARKET DEVELOPMENTS: Q4 2022 – Q1 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

- **NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

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- **NATIONAL DAIRY OUTLOOK MEDIUM TERM (1ST 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 8 MARCH 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-Dec 2022 / Jan-Dec 2021	What are your expectations for deliveries in Q1/23 compared to Q1/22?	What are your expectations for deliveries in Q2/23 compared to Q2/22?
2 216 M kg / 2 271 -2,5%	Decreasing (deliveries)	Decreasing (deliveries)
Milk price evolution		What are your expectations for prices in Q1/23 compared to Q1/22?
Current milk price: December 22: 55,2 cnt/kg	January 22 / January 21: +13,3 cnt/kg (December)	Stable/decreasing (prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Dec 2022/ Jan-Dec 2021	Expectations Q1/23 compared to Q1/22 (+ / - / stable)	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Feb 23 / Feb 22	Expectations Q1/23 compared to Q4/22 (+ / - / stable)	(Including stocks, consumption, etc.)
SMP	N/A%			%		
WMP	N/A%			%		
CHEESE	-1,7%			%		
BUTTER	-4%			%		
WHEY	N/A%			%		





➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: Q4 2022 – Q1 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

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➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (1ST 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 8 MARCH 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-Dec 2022 / Jan-Dec 2021	What are your expectations for deliveries in Q1/23 compared to Q1/22?	What are your expectations for deliveries in Q2/23 compared to Q2/22?
- 0,8%	-2% (deliveries)	- 1% (deliveries)
Milk price evolution		What are your expectations for prices in Q1/23 compared to Q1/22?
Current milk price: 51,1 €/100kg	January 22 / January 21: + 25%	50 €/kg (+ 20%) (prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Dec 2022/ Jan-Dec 2021	Expectations Q1/23 compared to Q1/22 (+ / - / stable)	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Feb 23 / Feb 22	Expectations Q1/23 compared to Q4/22 (+ / - / stable)	(Including stocks, consumption, etc.)
SMP	- 6,5%	+	+	-30%	stable	
WMP	-1,1%	stable	stable	-15 %	stable	
CHEESE	-0,1%	-	-		stable	
BUTTER	-1,0%	+	+	-23 %	stable	
WHEY	-5,1%	stable	stable	-50 %	stable	



➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: Q4 2022 – Q1 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Since summer, milk production has been down compared to last year due to cut of cattle during the summer. French cattle show the biggest cut year to year (– 3%) ever. Also, forage stocks are low, and producer are conservatives.

Milk prices increase less than other European prices but should remain at high level for the next months.

Dairy products prices in retail have increased during all 2022 and should increase in mars again.

Consumption in retail is down compared to last year due to the inflation of dairy products. Dairy fat are the products with the biggest decrease.

A new law (EGALIM 3) to regulate relation between retail and their supplier have been vote in both legislative institutions. It tries to decrease the bargaining power of the retailers and give more power to producers.

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

In France, inflation, high energy costs and dry conditions will be the main challenges for dairy for 2023.

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (1ST HALF 2023)**

Expected evolution in milk supply (+/-?): DOWN
 Production trends for main products: DOWN
 Consumption trends: DOWN
 Exports (+/- and why?): UP European prices are now competitive compared to international markets
 Latest developments of the National Organic market: Over supply, less demand price are going down

➔ **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 8 MARCH 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-Nov 2022 / Jan-Nov 2021	What are your expectations for deliveries in Q1/23 compared to Q1/22?	What are your expectations for deliveries in Q2/23 compared to Q2/22?
-0,5%	Stable (deliveries)	Stable (deliveries)
Milk price evolution		What are your expectations for prices in Q1/23 compared to Q1/22?
Current milk price: 57,4 (euro per 100 kg)	January 23 / January 22: +44%	Stable (prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Nov 2022/ Jan-Nov 2021	Expectations Q1/23 compared to Q1/22 (+ / - / stable)	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Feb 23 / Feb 22	Expectations Q1/23 compared to Q4/22 (+ / - / stable)	(Including stocks, consumption, etc.)
SMP	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
WMP	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
CHEESE	+0,4%	Stable	Stable	+27%	-	The price variations refer to Grana Padano Pdo 9 months
BUTTER	+2,4%	Stable	Stable	-34%	+	The price variations refer to pasteurized butter
WHEY	n.a.	n.a.	n.a.	-49%	+	The price variations refer to whey for industrial use



➤ NATIONAL DAIRY MARKET DEVELOPMENTS: Q4 2022 – Q1 2023

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

After months of constant increases, Italian milk deliveries showed a slight contraction, closing the year on production levels similar as those of 2021. Inflation is affecting domestic purchases and consumption, especially of lower added value products. Companies have not yet managed to pass all their cost increases to the downstream side.

2023 opened with a stabilization of raw material costs, which however remain at high levels and far higher than the average of 2022. There is a prudential attitude from the companies, waiting for the spring.

➤ NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2023)

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

➤ NATIONAL DAIRY OUTLOOK MEDIUM TERM (1ST HALF 2023)

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

Production trends for main products: stable

Consumption trends: moderate decline in domestic consumption

Exports (+/- and why?): “+”. In 2022, exports continued to grow, achieving +6% in volume, despite the sharp increase in product prices due to cost inflation. We hope for a period of stabilization in values, but it is difficult to make medium-term forecasts, given the complicated context in which businesses operate.

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

➤ ISSUES TO BE RAISED WITH THE EUROPEAN COMMISSION

On the export front, the issue of exceptions to the on-site packaging and portioning of some important PDO cheeses, envisaged in the context of the EPA with Japan, remains 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:

The situation is constantly evolving and it is difficult to make predictions.

After almost zeroing in the months immediately following the outbreak of the conflict, exports to Ukraine partially recovered, closing 2022 at -40% in volume compared to 2021.

The specter of energy and grain rationing, still present though, is a little further away than it was in 2022.

The inflation rate in December also showed a significant slowdown compared to what was recorded in the previous months.

MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 8 MARCH 2023

Delegation: THE NETHERLANDS

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

➔ MILK SUPPLY EVOLUTION

DELIVERIES	COMMENT	
Jan-Dec 2022 / Jan-Dec 2021	What are your expectations for deliveries in Q1/23 compared to Q1/22?	What are your expectations for deliveries in Q2/23 compared to Q2/22?
+1,0%	Further strong recovery of deliveries expected (estimated increase of 3% to 4%).	Milk deliveries will still increase, although at a slower pace than in Q1, due to the expected decrease in farm gate milk prices.
Milk price evolution		What are your expectations for prices in Q1/23 compared to Q1/22?
Current milk price: € 56,00 €/100kg (February 2023)	February 23 / February 22: +24%	Milk prices will further decrease.

➔ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc.)
	Jan-Dec 2022/ Jan-Dec 2021	Expectations Q1/23 compared to Q1/22 (+ / - / stable)	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Feb 23 / Feb 22	Expectations Q1/23 compared to Q4/22 (+ / - / stable)	
SMP	+2,4%	n.a.	n.a.	-32%	n.a.	n.a.
WMP	-25,1%	n.a.	n.a.	-26%	n.a.	n.a.
CHEESE	-1,4%	n.a.	n.a.	+21%*	n.a.	n.a.
BUTTER	+0,4%	n.a.	n.a.	-24%	n.a.	n.a.
WHEY	+2,6%	n.a.	n.a.	-49%	n.a.	n.a.

*January price

➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: Q4 2022 – Q1 2023**
(e.g. industrial developments, domestic policy changes, external factors, exports)

Export development

Dutch export development in the period January till November 2022 showed a mixed picture. On the one hand export volumes of cheese (+11%) and skimmed milk powder (+10%) increased significantly. On the other hand trade of non-skimmed milk powder (-22%) decreased sharply. Exports of butter and -oil was slightly lower (-1%). Because of the strong growth in both volumes and market prices the Dutch export value increased significantly by almost 38% to € 10.2 billion.

Dutch Agricultural Agreement: development of vision for a future-proof Dutch agriculture in 2040

In October 2022 an independent advisor (a former politician) came up with a report with recommendations on how to reduce nitrogen emissions. One of the recommendation was to formulate a clear vision for the future of agriculture in the Netherlands. On the 25th of November 2022 the Minister of Agriculture informed the Parliament that he would develop with stakeholders an Agricultural agreement. With the Agricultural agreement the Minister is aiming at tackling several agricultural tasks at once. In November the Minister started consultation rounds with several stakeholders about the future perspectives and how to achieve a future-proof Dutch agriculture in 2040.

226.6 million euros will be available over the next two years for Dutch farmers who want to become more sustainable producers (e.g. switching to organic/nature-inclusive agriculture, independent advice or innovations on farm). The publication of an Agricultural Agreement is expected at the end of Q1 of 2023.

Nitrogen

The Dutch government is offering to buy out up to 3.000 “peak polluter” farms and major industrial polluters in an attempt to reduce ammonia and nitrogen oxide emissions. The group of 2.000 to 3.000 “peak polluters” will be offered a set of choices: innovate to drastically reduce emissions, transition to a new kind of business, relocate or voluntarily stop.

Nitrogen and phosphate in animal manure lower than new manure ceiling

According to CBS (Statistics Netherlands) the nitrogen excretion in the manure of cows, pigs, chickens and other livestock in 2022 remained 24 million kg below the established nitrogen ceiling of 489.4 million kg. In 2021, nitrogen excretion was already below the new production ceiling set by the European Commission at the end of September last year. Dairy cattle (including young stock) excreted 270 million kilograms of nitrogen last year, 1.2 percent less than in 2021.

Phosphate excretion remained the same in 2022 compared to a year earlier, but below the new production ceiling of 150.7 million kilograms. Phosphate production by the dairy sector amounted to 75 million kilograms last year, 1.7 percent more than in 2021.

Derogation nitrate directive

The European Commission Nitrate Committee granted the Netherlands the derogation of nitrate until December 2025, but on the condition that it will be gradually step down between now and December 2025. The European Commission threatened to end the derogation immediately if the Netherlands will not take action and show improvements this year.

Outdoor grazing stabilized in 2022

In 2022, the percentage of dairy farms that apply outdoor grazing has remained virtually stable at 83.9%. As in previous years, the share of farms applying full grazing increased slightly to 78.1%. The aim of the dairy sector is that 81.2 percent of dairy farms use outdoor grazing. The sector is well above that goal. Preserving pasture grazing is one of the seven themes of the Sustainable Dairy Chain.



Processing industry developments

- Vreugdenhil Dairy Foods, Nestlé, Wageningen University and a small group of 17 pilot farmers started a joint initiative “Low carbon farming” towards a more sustainable dairy. The objective is a 50% reduction in greenhouse gas emissions by 2030 as a key step in the transition towards regenerative agriculture.
- FrieslandCampina will shut down one of the two drying towers in Bedum from October 2023. The plant will also concentrate entirely on the production of demineralised whey powder, a basic ingredient for infant nutrition. Production of other products will be transferred to other sites.
- FrieslandCampina intends to relocate butter production to Lochem. In connection with this, the production location in 's-Hertogenbosch will be closed mid-2025 and the Lochem production location will be expanded.

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

Market expectations

From the start of October till the end of January 2023, the dairy market showed a continuous downward trend. The high price level, in combination with a recovery of milk supply in a number of key dairy countries (EU and US) and falling prices on the energy market, caused a drop in demand and put strong pressure on prices during that period.

A positive change in the dairy market has been visible since the second week of February. The upward trend of the last few weeks seems to be mainly a correction of price levels that have fallen too far. Because of that, buying interest returned into the market. In addition, many market parties were short covered and had to buy to meet the demand.

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (1ST 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 8 MARCH 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-Dec 2022 / Jan-Dec 2021	What are your expectations for deliveries in Q1/23 compared to Q1/22?	What are your expectations for deliveries in Q2/23 compared to Q2/22?
+2,2%	increase (deliveries)	increase (deliveries)
Milk price evolution		What are your expectations for prices in Q1/23 compared to Q1/22?
Current milk price: 54,19 EUR/100kg (January 2023)	January 23 / January 22: +34,2%	The price is decreasing but it still should be higher than in Q122 (prices)

➔ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc.)
	Jan-Dec 2022/ Jan-Dec 2021	Expectations Q1/23 compared to Q1/22 (+ / - / stable)	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Jan 23 / Jan 22	Expectations Q1/23 compared to Q4/22 (+ / - / stable)	
SMP	-1,1%	-	-	-7,5%	-	
WMP	-2,3%	-	-	+9,8%	-	
CHEESE	+0,3%	+	+	+23%	-	
BUTTER	+5%	+	-	-8,5%	-	
WHEY	ND	ND	ND	-5,2%	-	

➔ **NATIONAL DAIRY MARKET DEVELOPMENTS: Q4 2022 – Q1 2023**

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

Due to inflation (17,2% in January 2023), market share of private labels has increased.

CN	Total exports (incl. EU and 3rd countries)					
	Value ['000 EUR]		Value ['000 PLN]		Volume [tons]	
	I-XII 2021	I-XII 2022	I-XII 2021	I-XII 2022	I-XII 2021	I-XII 2022
Total	2 350 522	3 293 768	10 734 968	15 386 293	1 704 282	1 692 685
0401	521 313	705 223	2 380 570	3 296 918	877 664	842 303
0402	337 232	520 463	1 539 727	2 427 299	139 513	144 156
0403	142 004	189 310	648 544	885 055	115 918	130 838
0404	214 182	259 678	978 203	1 213 090	233 437	221 665
0405	210 219	472 656	960 646	2 205 084	49 384	74 176
0406	925 572	1 146 438	4 227 278	5 358 848	288 365	279 547

➔ **NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2023)**

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

Prices of main products are predicted to decrease.

➔ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (1ST HALF 2023)**

Expected evolution in milk supply (+/-?): Farmers are not satisfied with raw milk price to costs of production ratio. Some are considering leaving the sector and moving to some other areas of production. However deliveries in January 2023 are up by 3,5% when compared to December 2022. Poland has faced similar situation before – sudden raw milk price drop forced farmers to offset income decrease with higher output.

Production trends for main products: much will depend on farmers' reaction to market conditions – either there will be more milk to process or not.

Consumption trends: stable

Exports (+/- and why?): Even though exchange rate of USD and EUR to Polish currency is favourable, Poland is losing its competitive advantage due to price changes on EU market, which may lead to decrease in export's value (decrease in volume has already happened); Hopefully, Chinese market picks up.

Latest developments of the National Organic market: consumption has decreased because of prices of organic products.

➔ **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:

Despite population increase (it is estimated that so far around 1,5 mln Ukrainians decided to stay in Poland), there are no visible changes in consumption of dairy products – it is conceivable that people are simply trying to spend less money on food (including dairy). Energy costs increase send shockwaves across Polish food sector at every level of chain of deliveries.

MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 8 MARCH 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-Dec 2022 / Jan-Dec 2021	What are your expectations for deliveries in Q1/23 compared to Q1/22?	What are your expectations for deliveries in Q2/23 compared to Q2/22?
-2,2%	Stable	To increase
Milk price evolution		What are your expectations for prices in Q1/23 compared to Q1/22?
Current milk price: 0,597€/L (Dec 22)	Dec 22 Vs. Dec 21: +64%	To decrease

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT
	Jan-Dec 2022/ Jan-Dec 2021	Expectations Q1/23 compared to Q1/22 (+ / - / stable)	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Feb 23 / Feb 22	Expectations Q1/23 compared to Q4/22 (+ / - / stable)	(Including stocks, consumption, etc.)
SMP	N/A	N/A	N/A	N/A	N/A	N/A
WMP	N/A	N/A	N/A	N/A	N/A	N/A
CHEESE	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: Q4 2022 – Q1 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. We expect difficult negotiations between farmers and processors for the coming months.

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

For that reason, the price of the food products for consumers is in the centre of the political debate in Spain. The 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 (2ND QUARTER 2023)**
(Trends, industrial changes, policy changes, **market expectations**)

Uncertainty due to the development of the war in Ukraine in terms of costs (energy and raw materials). Deliveries of raw milk are expected to increase due to current high prices.

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 (1ST 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**

MARKET SURVEY HIGHLIGHT REPORT

EDA TEC MEETING 8 MARCH 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-Dec 2022 / Jan-Dec 2021	What are your expectations for deliveries in Q1/23 compared to Q1/22?	What are your expectations for deliveries in Q2/23 compared to Q2/22?
-0.5%	+1.7% (deliveries)	(deliveries)
Milk price evolution		What are your expectations for prices in Q1/23 compared to Q1/22?
Current milk price: 57.59 €/100kg	December 21 / December 22: +45.0%	(prices)

➤ DAIRY PRODUCTS DEVELOPMENT

	Production			Price		COMMENT (Including stocks, consumption, etc.)
	Jan-Dec 2022/ Jan-Dec 2021	Expectations Q1/23 compared to Q1/22 (+ / - / stable)	Expectations Q2/23 compared to Q2/22 (+ / - / stable)	Jan 23 / Jan 22	Expectations Q1/23 compared to Q4/22 (+ / - / stable)	
SMP	Powder figures are not available split into WMP and SMP. Total powder production for 2022 was 6.5% down on 2021			-22.0%		
WMP	n.a.			n.a.		
CHEESE	+3.4			+11.7%		
BUTTER	-2.1%			-15.2%		
WHEY	n.a.			n.a.		

➔ NATIONAL DAIRY MARKET DEVELOPMENTS: Q4 2022 – Q1 2023

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

Total UK dairy exports during the 2022 calendar year were 2.4% higher in terms of volume and 38.3% up in terms of value. For imports, volume fell by 5.3% but value was 25.5% higher. For the closing quarter of 2022, dairy exports were 5.7% lower by volume, but 40.6% higher by value and imports 32.2% lower by volume but 24.8% up in value.

Having started the 2022/23 milk year below the previous year's levels, a change in the weather in the autumn gave a late boost to grass growth, which, combined with a favourable milk to feed price ratio, provided a lift to production and monthly deliveries since September have been higher than the year before.

Yields are expected to remain supported strong during the opening months of 2023 and, coupled with strong milk prices and a stable milking herd, production during the opening quarter is forecast to be 1.7% higher than in 2022.

Farmgate milk prices grew strongly over the opening nine months of the milk year and continued to set record monthly highs (averaging over 48% higher than in 2022 over the course of that period). Having peaked in December, however, prices have begun to slip slightly on the back of falling returns from the marketplace as high energy, fuel and fertiliser costs and rising inflation continue to dampen demand. A number of milk processors announced cuts in the price they pay to farmers in January and the number and size of these falls increased in February and March.

Wholesale prices rose strongly during the first half of the milk year and peaked in September. Since then, however, falling returns have seen prices fall with January, especially, dropping sharply as a combination of high supplies and reduced demand (including from China) have impacted the sector.

➔ NATIONAL DAIRY OUTLOOK SHORT TERM (2ND QUARTER 2023)

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

Decreasing farmgate milk prices, labour shortages, and rising interest rates, combined with the continued burden of high input costs on working capital requirements, are expected to limit further yield growth through 2023.

Deposit return schemes are being introduced throughout the UK. The scheme in Scotland goes live in August 2023, with schemes in England, Wales and Northern Ireland starting in October 2025. In Scotland and Wales all single use drinks containers made from PET plastic, steel, aluminium or glass will carry a refundable deposit. In England and Northern Ireland glass will not be included.

Extended producer responsibility for packaging is being introduced to ensure that polluters pay to recycle packaging.



Government reinforced its commitment to the environment in the 2023 Environment Improvement Plan. Many of the actions detailed in this plan are focused on agriculture, including support for the adoption of nature-friendly farming practices, sustainable agricultural techniques, reduced reliance on manufactured pesticides and actions taken to reduce risks from floods, droughts and wildfires.

➡ **NATIONAL DAIRY OUTLOOK MEDIUM TERM (1ST HALF 2023)**

Expected evolution in milk supply (+/-?): +1.2%

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: