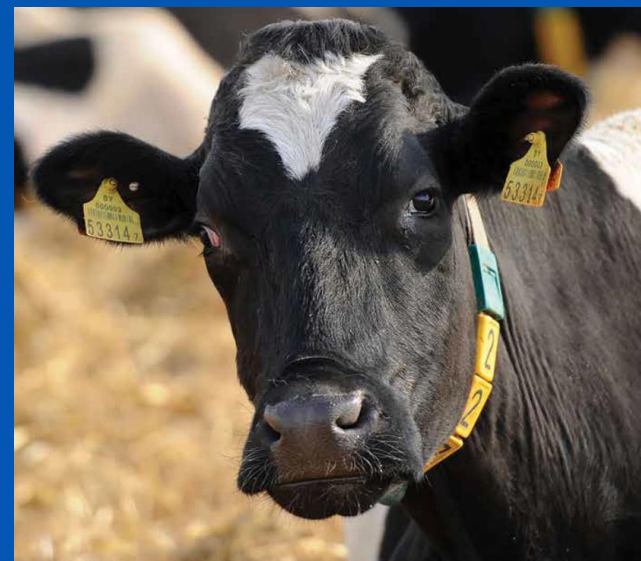


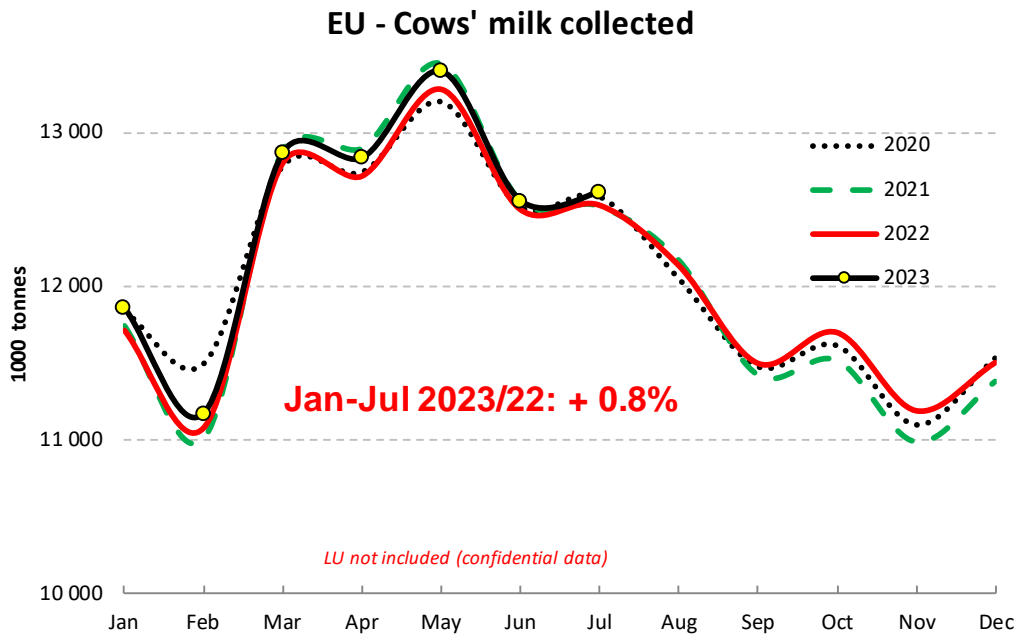
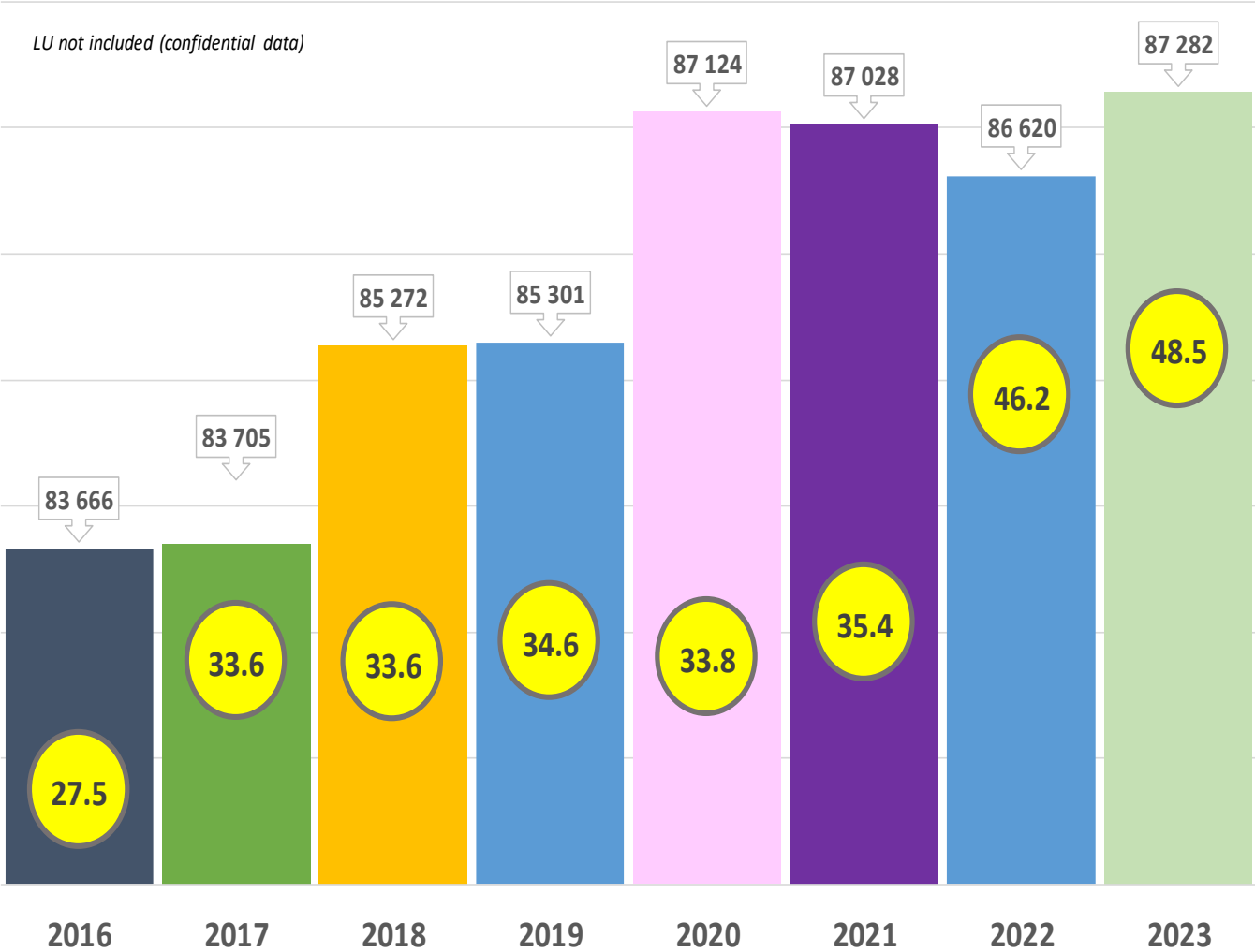
# Civil Dialogue Group Animal Production

Milk market situation



*Brussels, 29 September 2023*

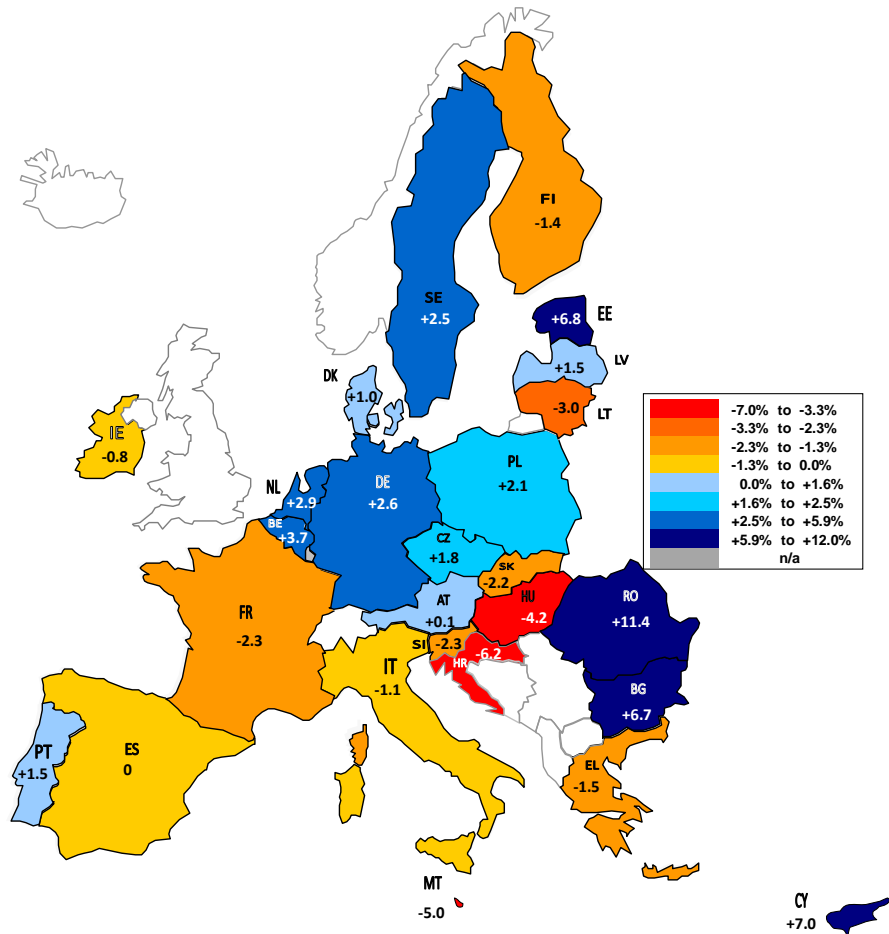
# EU-27 milk deliveries and price Jan-Jul 2016-23 (x1000 t, c/kg)



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

EU Milk Deliveries compared to last period (in %)

(Jan - Jul 2023 / Jan - Jul 2022)



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

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

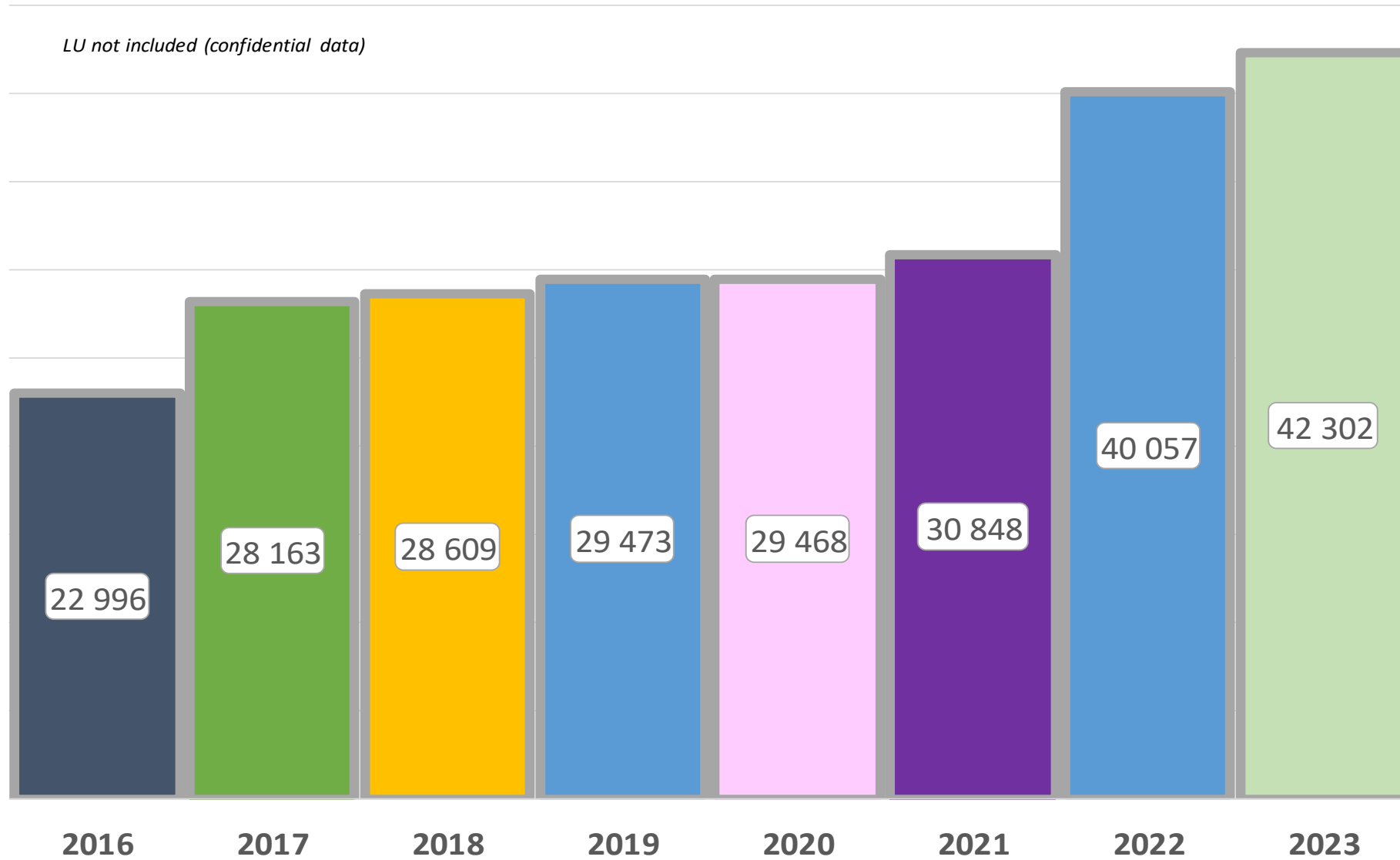
Jul 23 compared to Jul 22

Rank	evolution in %		evolution in 1000 Tons	
	MS	%	MS	Tons
1.	EE	+ 8.5%	DE	+ 58
2.	RO	+ 7.4%	PL	+ 23
3.	CY	+ 7.2%	NL	+ 21
4.	PT	+ 3.8%	ES	+ 11
5.	SE	+ 3.5%	BE	+ 10
6.	BG	+ 2.8%	SE	+ 8
7.	BE	+ 2.7%	RO	+ 7
8.	CZ	+ 2.7%	CZ	+ 7
9.	PL	+ 2.1%	PT	+ 6
10.	DE	+ 2.1%	EE	+ 6
11.	ES	+ 1.8%	DK	+ 4
12.	NL	+ 1.8%	CY	+ 2
13.	LV	+ 0.9%	BG	+ 2
14.	DK	+ 0.9%	LV	+ 1
15.	FI	+ 0.3%	FI	+ 1
16.	AT	+ 0.2%	AT	+ 1
17.	IE	- 0.2%	MT	- 0
18.	IT	- 0.9%	SI	- 1
19.	SI	- 2.3%	SK	- 2
20.	SK	- 2.3%	IE	- 2
21.	LT	- 2.6%	HR	- 3
22.	HU	- 2.7%	LT	- 3
23.	FR	- 2.9%	EL	- 3
24.	EL	- 6.5%	HU	- 4
25.	MT	- 8.5%	IT	- 10
26.	HR	- 8.5%	FR	- 57
EU		+ 0.7%	EU	+ 82

rem: LU not included (confidential data)

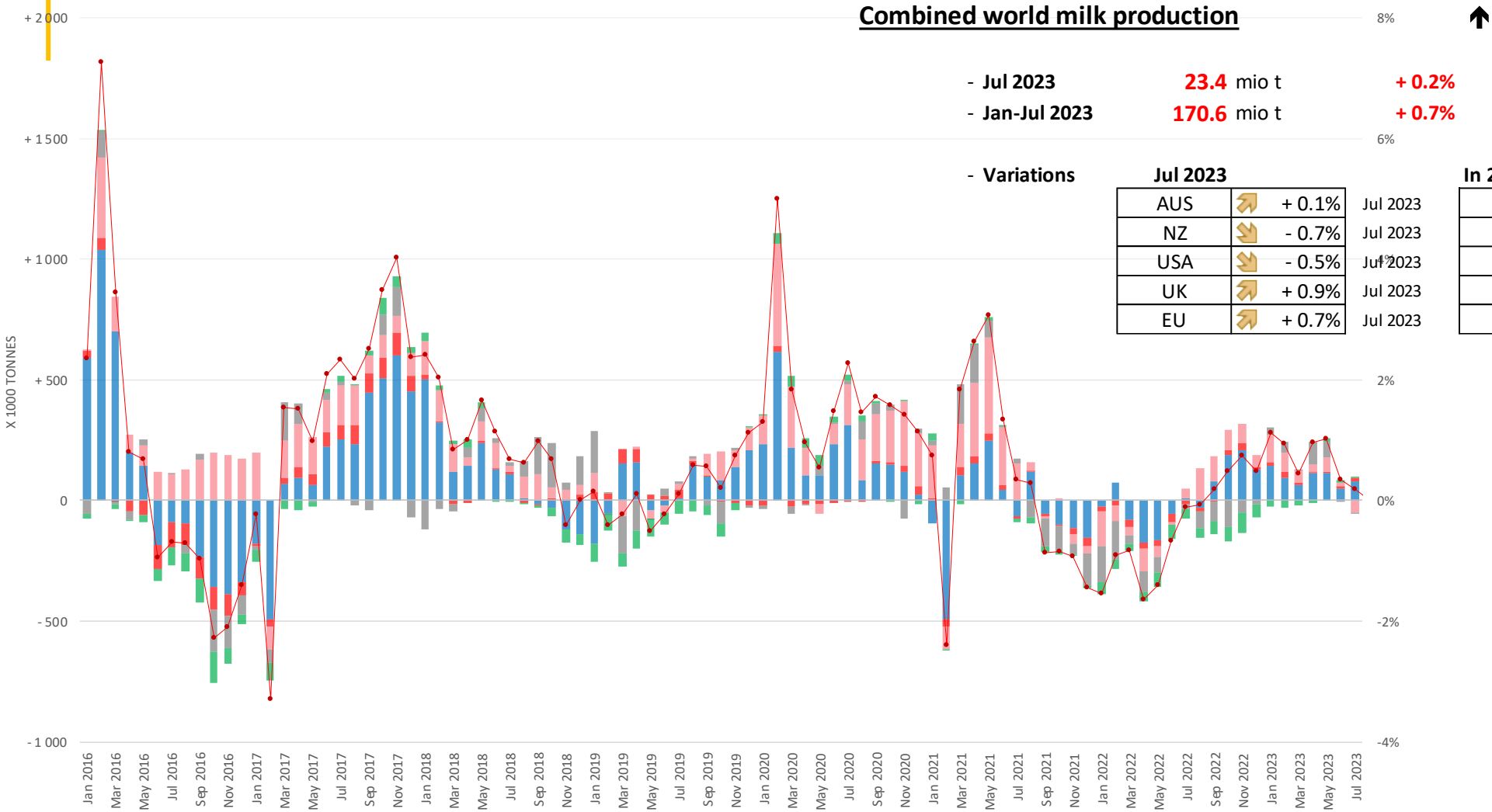
EU-27 value milk production  
Jan-Jul 2016-23 (x million €)

*LU not included (confidential data)*



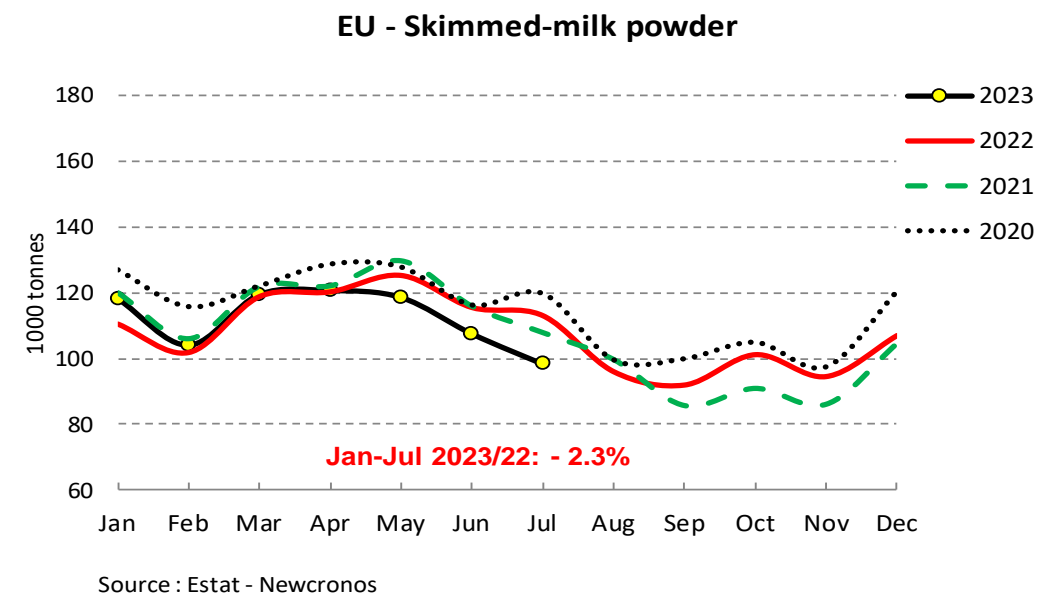
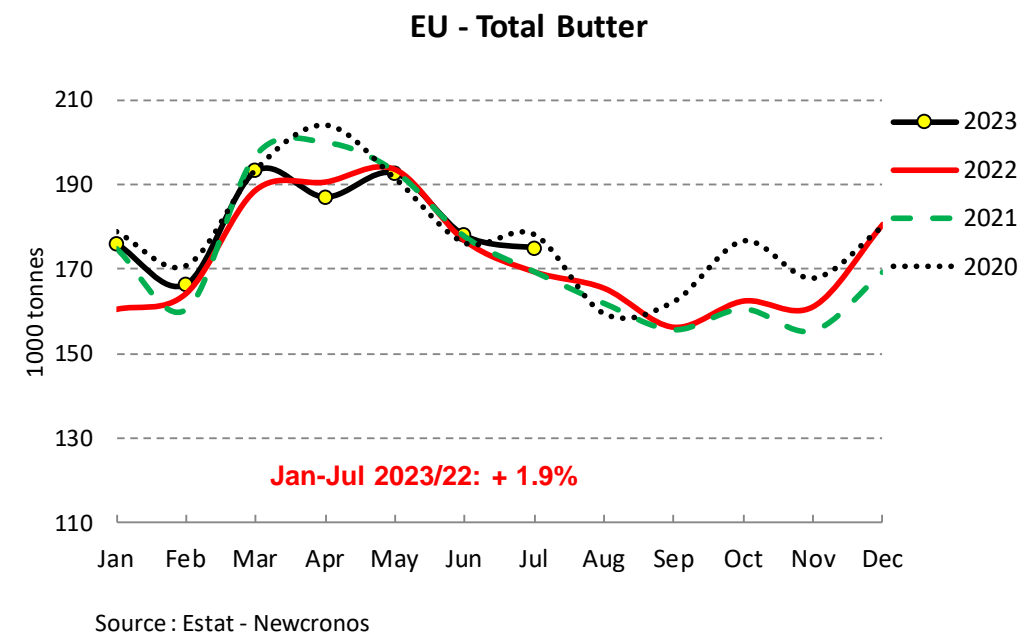
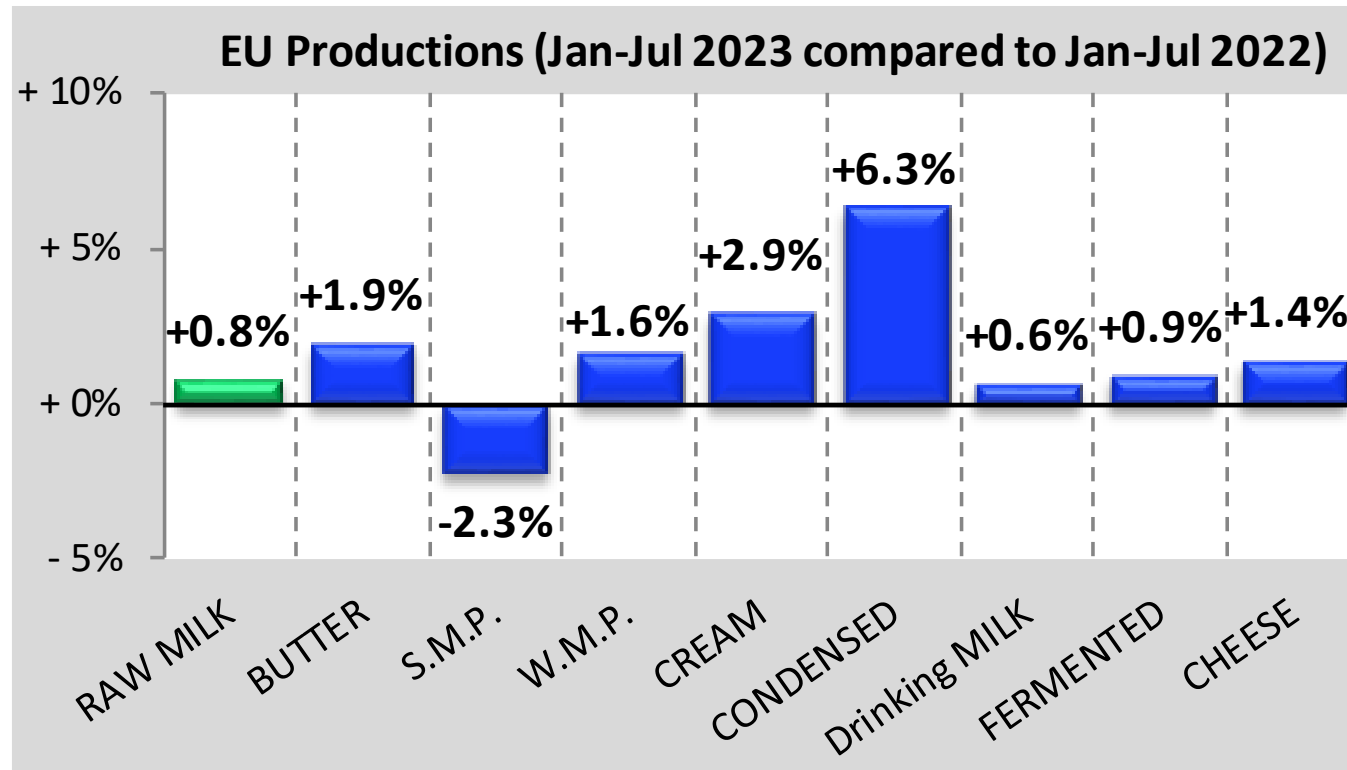
EU\*+UK+US+NZ+AUS COMBINED MILK PRODUCTION GROWTH

Combined world milk production

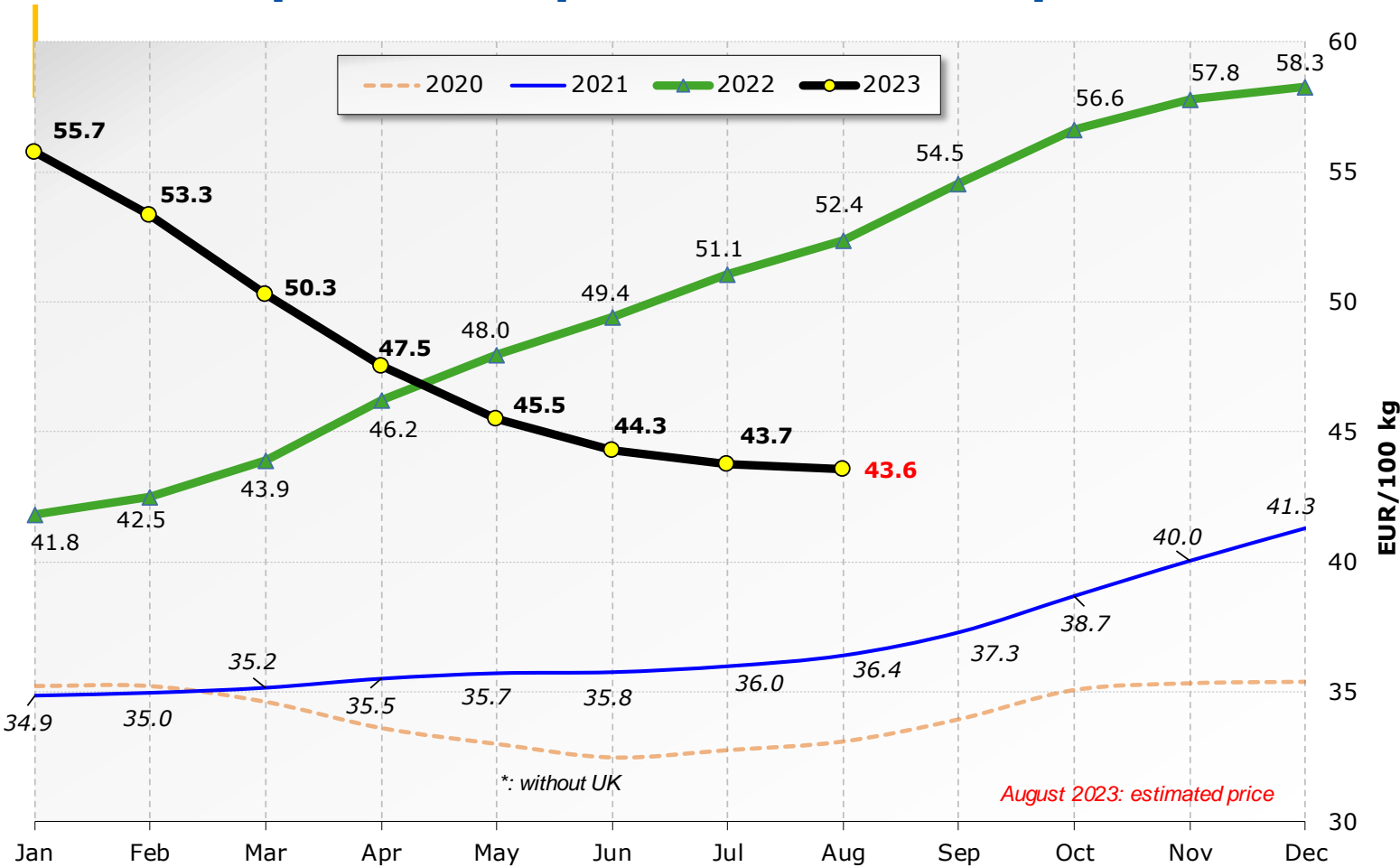


In 2023			
AUS	↓	- 1.4%	(Jan-Jul 2023)
NZ	↑	+ 2.7%	(Jan-Jul 2023)
USA	↑	+ 0.5%	(Jan-Jul 2023)
UK	↑	+ 0.9%	(Jan-Jul 2023)
EU	↑	+ 0.8%	(Jan-Jul 2023)

\* not including LU (confidential data)



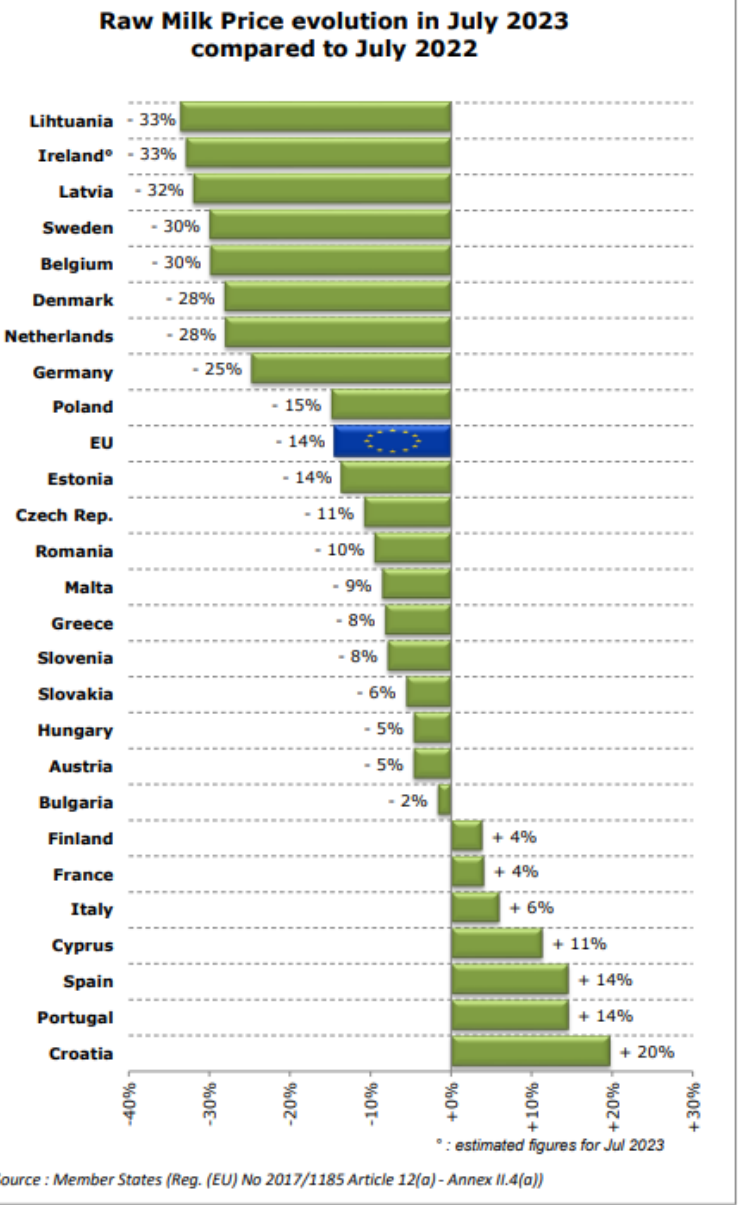
# EU milk prices paid to the producers



Source : Member States Reg. (EU) No 1717/1185 Article 12(a) - Annex II.4(a))

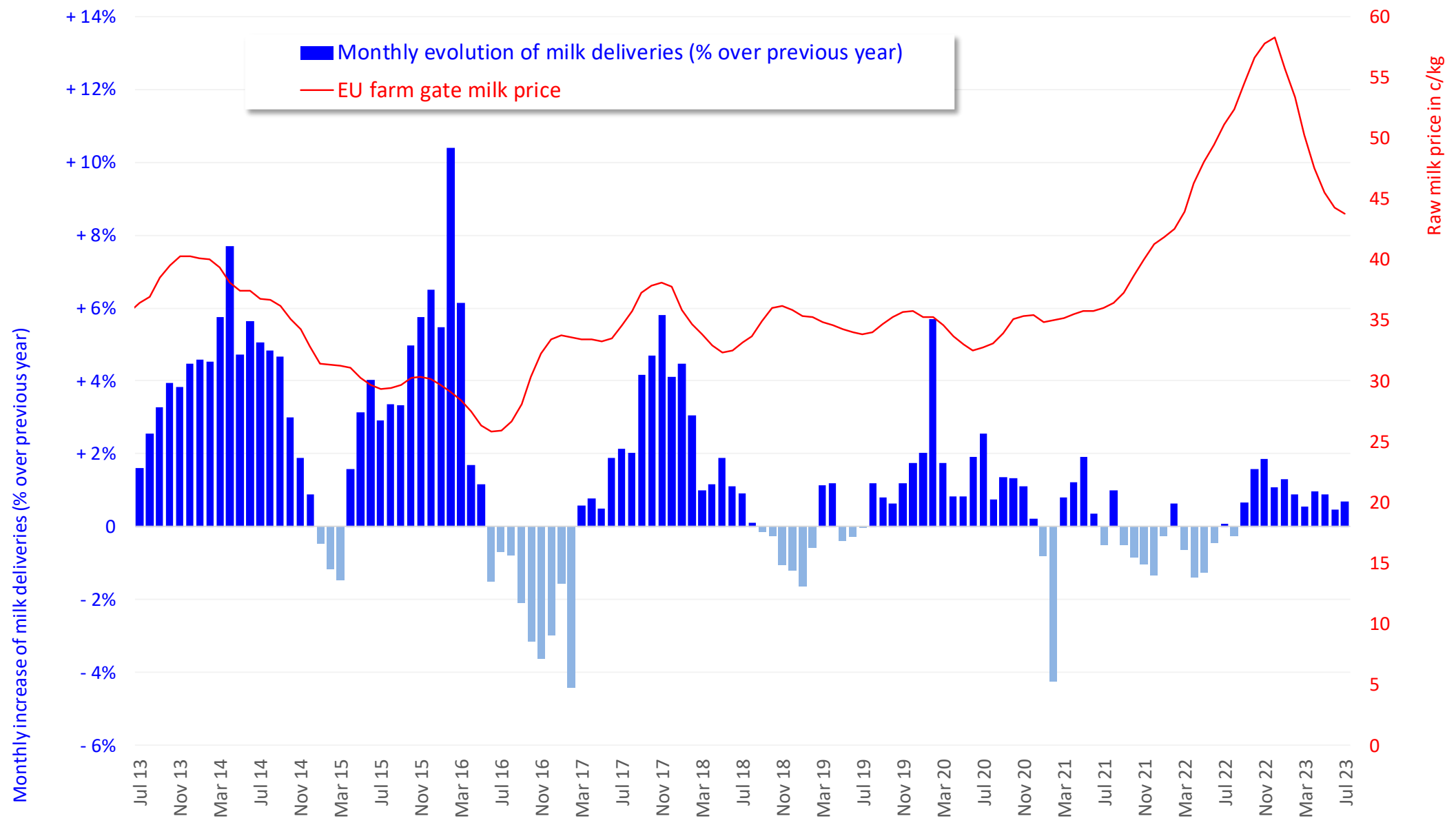
### Price of Jul 23 compared to :

	BE	BG	CZ	DK	DE	EE	IE	GR	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	EU (without UK)
Jun 23	-2.5%	+1.1%	-4.9%	-0.3%	-2.4%	-1.3%	-1.5%	+0.3%	-0.7%	+0.6%	-0.8%	-1.1%	+0.2%	-0.2%	-1.0%	-	-7.5%	+0.4%	idem	-3.8%	-2.2%	-4.7%	+5.3%	-1.0%	-3.2%	-0.8%	+0.1%	-1.3%
Jul 22	-29.7%	-1.7%	-10.8%	-28.0%	-24.7%	-13.5%	-32.8%	-8.2%	+14.5%	+4.0%	+19.6%	+5.9%	+11.3%	-31.8%	-33.5%	-	-4.7%	-8.5%	-27.9%	-4.7%	-14.8%	+14.5%	-9.5%	-7.9%	-5.6%	+3.8%	-29.8%	-14.4%



Source : Member States (Reg. (EU) No 1717/1185 Article 12(a) - Annex II.4(a))

# Increased production since Sept



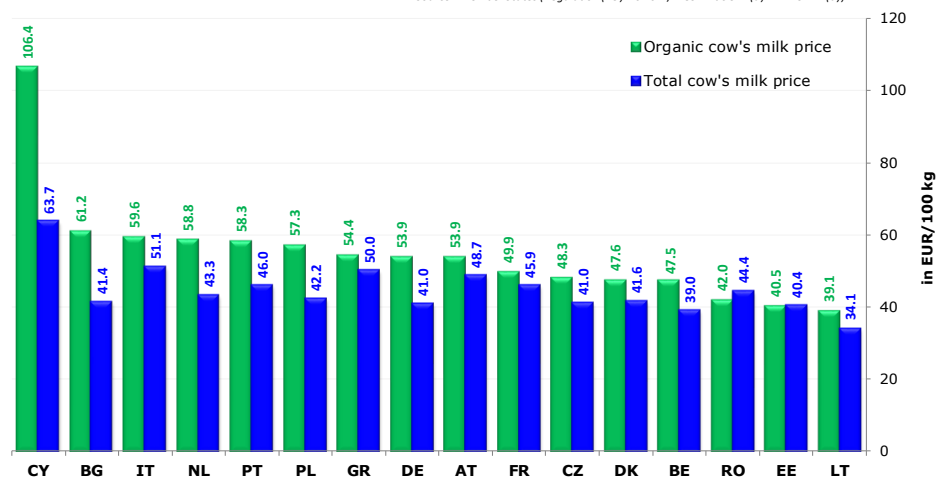


# EU organic raw milk production & prices

## EU Organic cow's milk prices

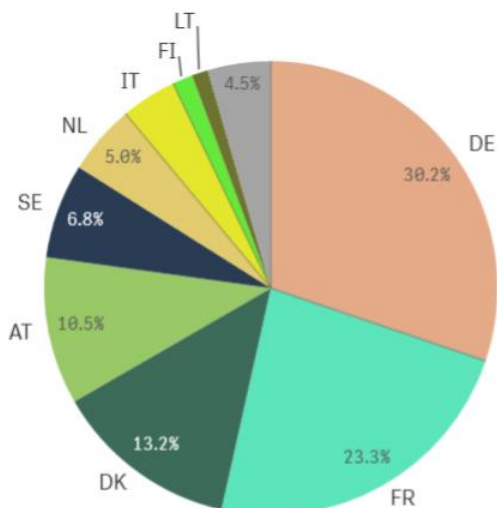
July 2023

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



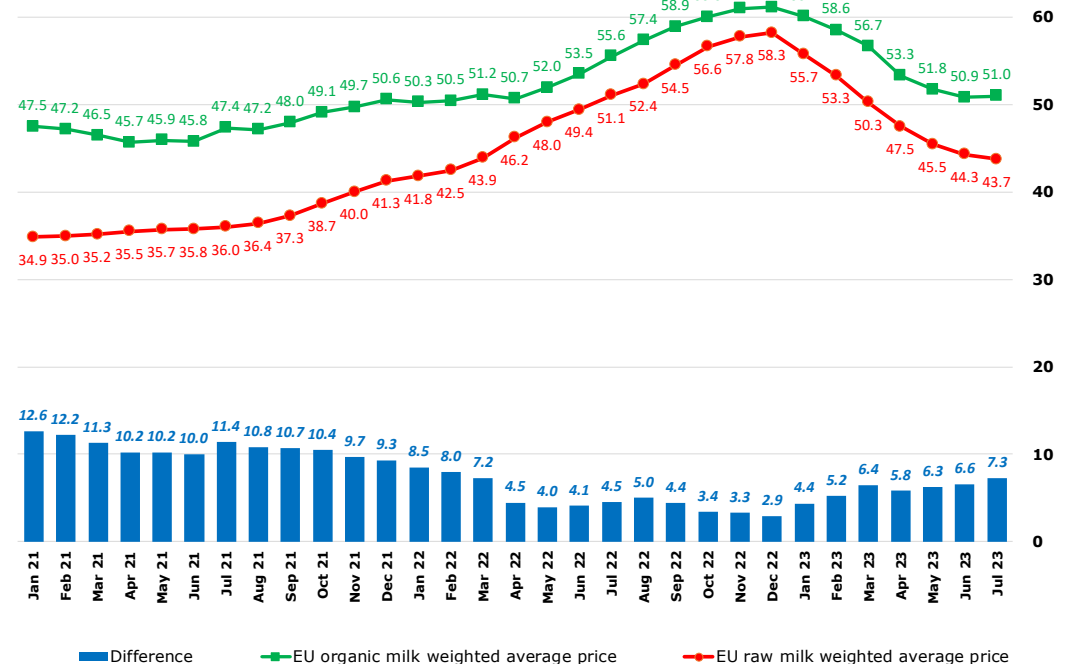
## Organic cow's milk deliveries in July 2023

For years: 2023 > Months: 07 > All Member States > Organic raw cow's milk delivered to dairies > Thousand tonnes



## EU raw milk and organic milk prices

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



July 2023:

3.9% of total raw milk collected was organic (based on notifications from 22 MS)

# EU evolutive\* dairy Quotations

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

Latest prices (EUR/100kg)	447	233	334	358	405	413	629	70
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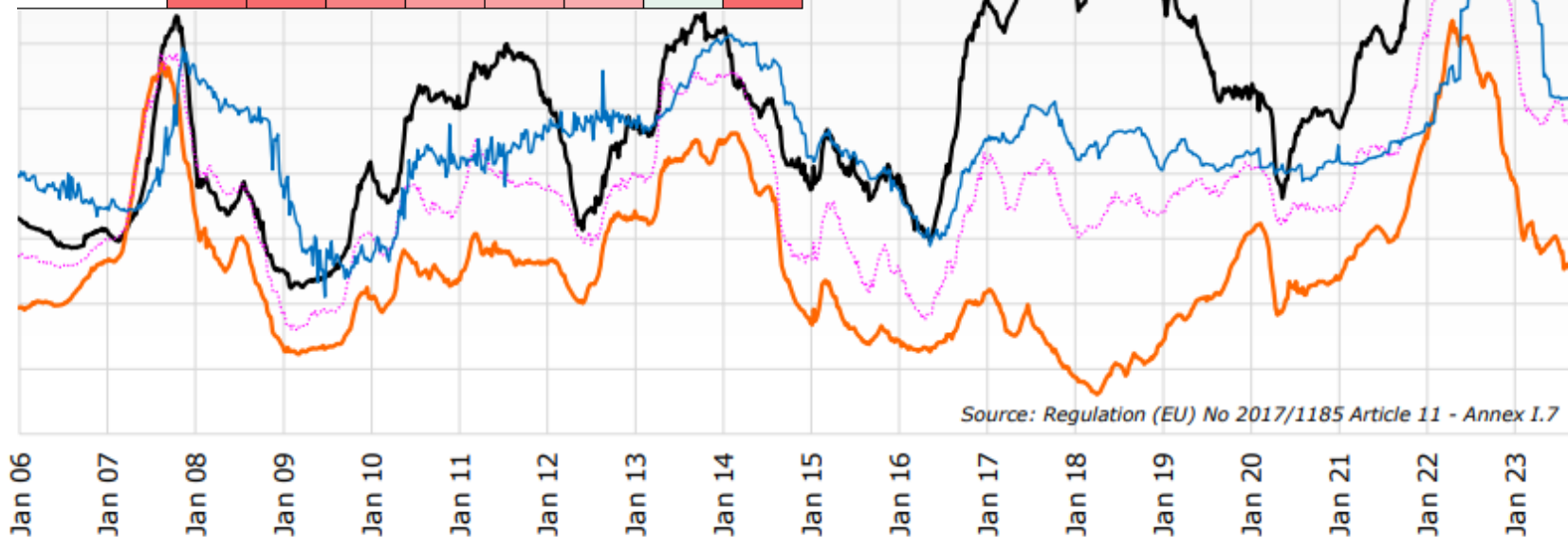
max: 24/09/2023

Dairy prices up to 24/09/2023

	BUTTER	SMP	WMP	CHEDDAR	EDAM	GOUDA	EMMENTAL	WHEYPOWDER
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Compared to:

4 weeks ago	+ 0,3%	+ 2,3%	+ 1,2%	+ 0,0%	+ 0,4%	- 1,3%	+ 1,4%	+ 9,0%
begin 2023	- 20,6%	- 20,3%	- 17,3%	- 23,9%	- 22,1%	- 21,9%	- 5,4%	- 22,9%
5 years avg.	- 5,5%	- 5,3%	+ 0,4%	+ 3,5%	+ 12,1%	+ 14,4%	+ 25,4%	- 19,0%
1 week ago	+ 1,5%	+ 1,9%	+ 2,0%	+ 0,1%	+ 1,1%	+ 0,2%	+ 1,7%	- 2,8%
1 year ago	- 38,2%	- 37,5%	- 31,9%	- 25,6%	- 23,6%	- 20,6%	+ 3,9%	- 37,8%



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

800

750

700

650

600

550

500

450

400

350

300

250

200

150

100

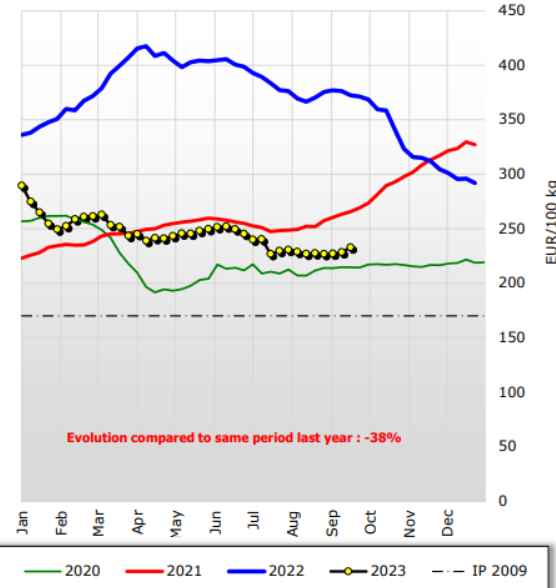
50

0

in EUR/100 kg

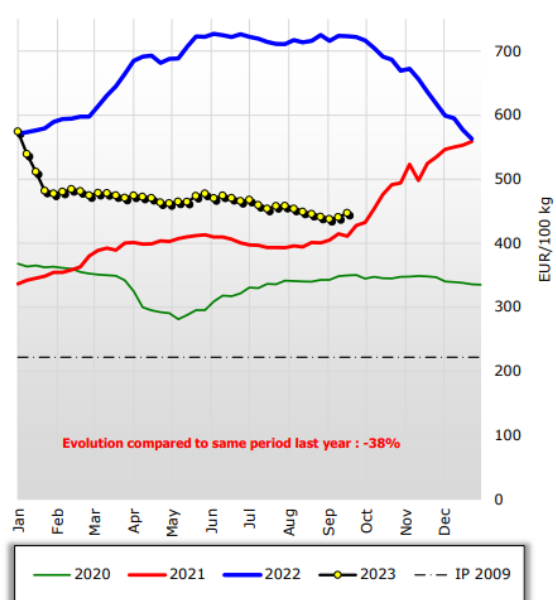
## Weekly EU SMP Prices

Latest price : 233 EUR/100kg



## Weekly EU BUTTER Prices

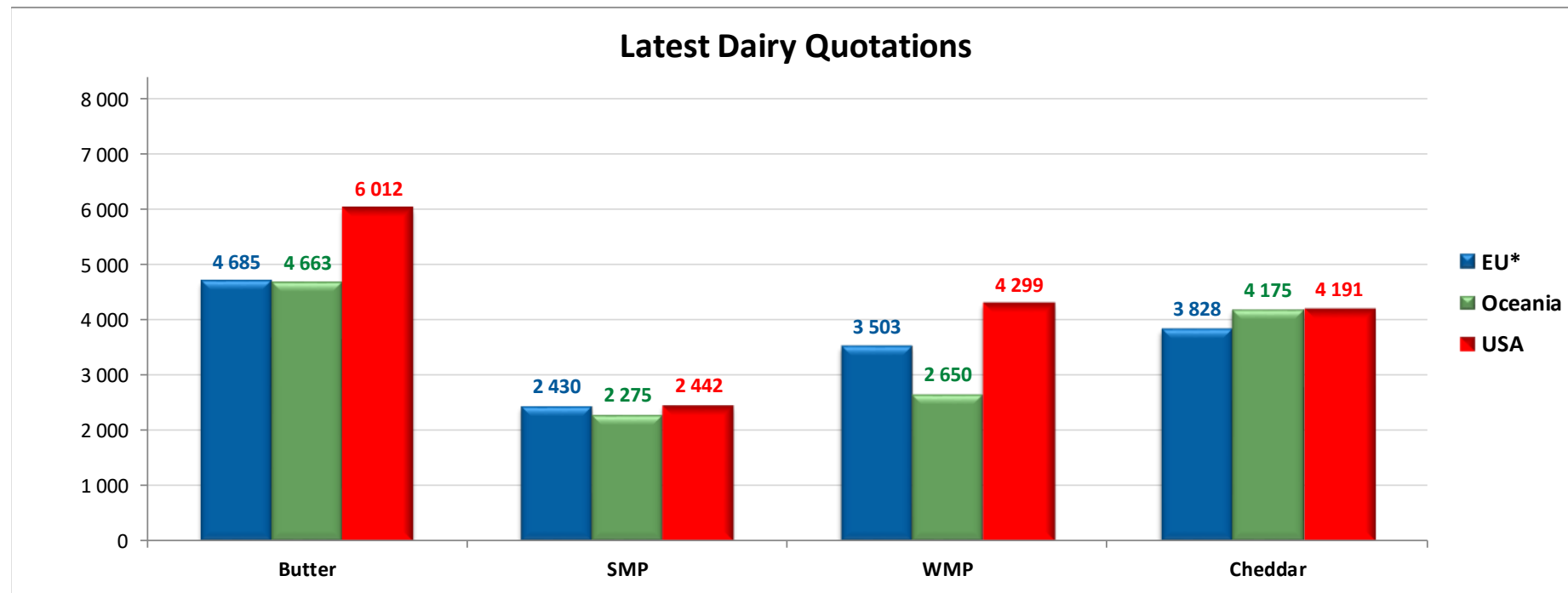
Latest price : 447 EUR/100kg



# Latest world dairy quotations

In US\$/t	Latest Quotations			Week - 2						Year - 1					
	17/09/2023			03/09/2023			% change (previous quotation)			18 September 2022			% change (1 year)		
	EU*	Oceania	USA	EU*	Oceania	USA	EU*	Oceania	USA	EU*	Oceania	USA	EU*	Oceania	USA
Butter	4 685	4 663	6 012	4 816	4 625	5 827	↓ -2.7%	→ +0.8%	→ +3.2%	7 195	5 425	6 910	↓ -35%	↓ -14%	↓ -13%
SMP	2 430	2 275	2 442	2 458	2 388	2 402	↓ -1.1%	↓ -4.7%	→ +1.7%	3 788	3 575	3 448	↓ -36%	↓ -36%	↓ -29%
WMP	3 503	2 650	4 299	3 568	2 700	4 189	↓ -1.8%	↓ -1.9%	→ +2.6%	4 875	3 550	5 269	↓ -28%	↓ -25%	↓ -18%
Cheddar	3 828	4 175	4 191	3 864	4 175	4 353	→ -0.9%	→ nc	↓ -3.7%	4 705	5 225	4 452	↓ -19%	↓ -20%	↓ -6%

Source : Member States Notifications under Reg. 2017/1185, USDA



# EU Exports of Dairy products - Main destinations *(including UK)*

Source : COMEXT

Period : January-June

Quantity in Tonnes

EU EXPORTS of BUTTER - main destinations					
Period : January-June					
Qty Tons	2021	2022	2023		
United Kingdom	15 648	26 841	21 386	↓	- 20%
USA	19 973	20 233	23 920	↑	+ 18%
China	10 502	7 218	8 155	↑	+ 13%
South Korea	4 916	5 957	5 957	→	+ 0%
Saudi Arabia	4 413	5 023	7 283	↑	+ 45%
Taiwan	3 364	3 352	3 154	↓	- 6%
Indonesia	2 190	3 278	2 054	↓	- 37%
U.A.Emirates	2 392	3 082	2 489	↓	- 19%
Singapore	3 058	2 646	2 499	↓	- 6%
Switzerland	1 812	2 509	2 349	↓	- 6%
Other	39 894	35 432	46 760	↑	+ 32%
TOTAL	108 162	115 571	126 005	↑	+ 9%

EU EXPORTS of CHEESES - main destinations					
Period : January-June					
Qty Tons	2021	2022	2023		
United Kingdom	200 538	210 067	215 389	→	+ 3%
USA	61 796	63 394	57 643	↓	- 9%
Japan	59 585	55 664	51 428	↓	- 8%
Switzerland	38 105	36 224	35 703	→	- 1%
South Korea	26 395	26 926	30 977	↑	+ 15%
Saudi Arabia	22 298	23 855	21 365	↓	- 10%
China	21 708	17 149	16 362	→	- 5%
Ukraine	23 773	16 721	16 289	→	- 3%
Australia	13 515	12 832	13 471	→	+ 5%
Libya	12 833	12 718	10 745	↓	- 16%
Other	199 421	194 446	211 755	↑	+ 9%
TOTAL	679 967	669 995	681 128	→	+ 2%

## EU Exports (with UK as partner)

Jan-Jun 2023

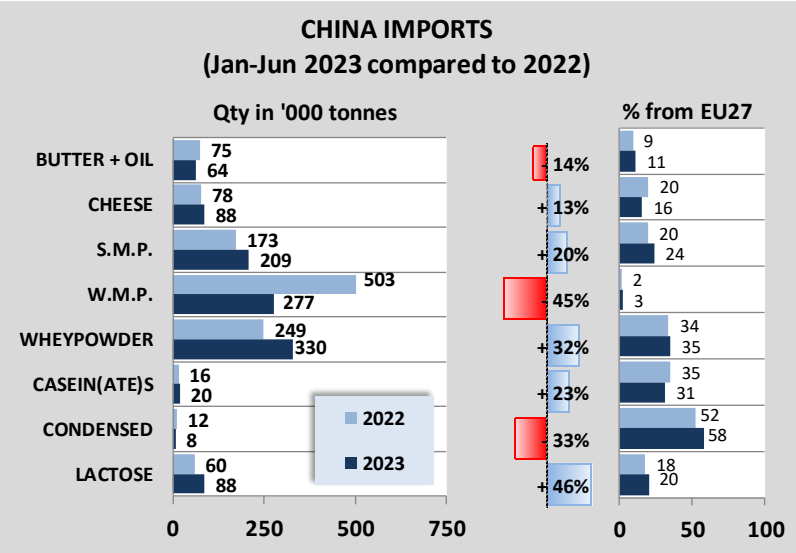
+ 9% in milk equivalent

+ 8% in value

		% variation in tons	
		Jan-Jun 2023	Jun 2023
Condensed	↑ + 11%	↑ + 19%	
SMP	↑ + 25%	↑ + 16%	
WMP	↑ + 12%	↑ + 44%	
Butter	↑ + 9%	↑ + 10%	
Butteroil	↓ - 5%	↑ + 46%	
Cheeses	→ + 2%	↑ + 8%	
Wheypowder	↑ + 5%	↑ + 16%	

EU EXPORTS of SMP - main destinations					
Period : January-June					
Qty Tons	2021	2022	2023		
China	71 022	42 621	49 595	↑	+ 16%
Algeria	48 039	40 944	91 073	↑	+ 122%
Indonesia	38 571	29 654	13 291	↓	- 55%
Egypt	20 987	24 329	28 560	↑	+ 17%
Nigeria	19 376	16 895	10 016	↓	- 41%
Philippines	23 524	16 744	11 627	↓	- 31%
Malaysia	20 244	15 496	17 835	↑	+ 15%
Yemen	19 452	14 860	13 300	↓	- 11%
Saudi Arabia	12 586	11 883	21 606	↑	+ 82%
Morocco	3 995	10 097	15 671	↑	+ 55%
Other	143 397	118 159	154 786	↑	+ 31%
TOTAL	421 192	341 683	427 360	↑	+ 25%

EU EXPORTS of WMP - main destinations					
Period : January-June					
Qty Tons	2021	2022	2023		
Oman	25 827	30 613	24 984	↓	- 18%
China	11 566	11 304	7 813	↓	- 31%
United Kingdom	8 557	8 358	9 391	↑	+ 12%
Kuwait	5 242	6 069	5 188	↓	- 15%
Senegal	4 553	4 038	3 492	↓	- 14%
Dominican R.	2 713	3 749	7 033	↑	+ 88%
Saudi Arabia	3 833	3 541	3 439	→	- 3%
Bangladesh	3 842	2 901	948	↓	- 67%
Cameroon	1 808	2 473	1 019	↓	- 59%
Angola	1 734	2 356	1 449	↓	- 39%
Other	83 639	53 500	79 626	↑	+ 49%
TOTAL	153 314	128 902	144 381	↑	+ 12%



# EU Imports of Dairy products - Main origins *(including UK)*

Source : COMEXT

**Period : January-June**

**Quantity in Tonnes**

EU IMPORTS of BUTTER - main origins					
Period : January-June					
Qty Tons	2021	2022	2023		
United Kingdom	13 154	18 682	15 954	↓	- 15%
Turkey	4	1 233	1	↓	- 100%
Ukraine	8	483	125	↓	- 74%
New Zealand	329	275	5 283		+++
USA	1 136	218	0	↓	- 100%
Iceland	249	74		↓	- 100%
Algeria		50		↓	- 100%
China		25		↓	- 100%
Malaysia		15		↓	- 100%
Japan	23	4		↓	- 100%
Other	77	7	272		+++
Total	14 980	21 066	21 636	↗	+ 3%

EU IMPORTS of CHEESES - main origins					
Period : January-June					
Qty Tons	2021	2022	2023		
United Kingdom	56 832	60 043	55 791	↓	- 7%
Switzerland	28 257	26 094	25 121	↘	- 4%
Serbia	903	998	1 116	↑	+ 12%
Turkey	510	956	628	↓	- 34%
Norway	546	516	1 162	↑	+ 125%
Bosnia-Herz.	361	410	484	↑	+ 18%
USA	130	275	198	↓	- 28%
Ukraine		214	261	↑	+ 22%
Iceland	28	131	126	↘	- 4%
Australia	457	115	16	↓	- 86%
Other	658	299	250	↓	- 17%
Total	88 684	90 052	85 153	↓	- 5%

# Keep in touch and thank you!



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