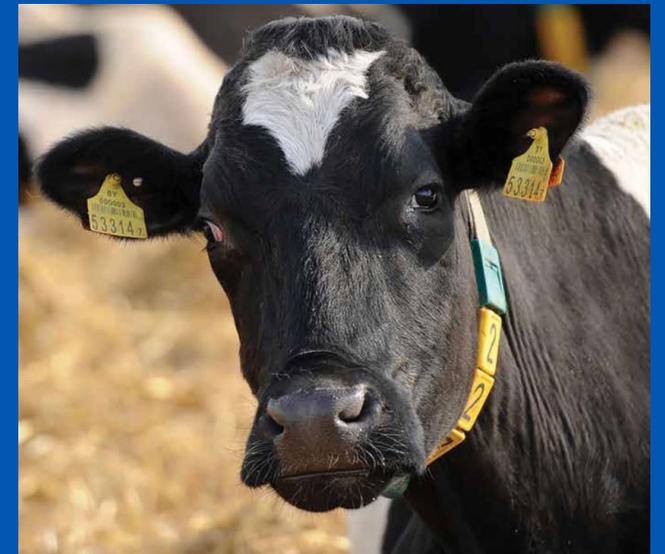


Civil Dialogue Group MILK

Milk market situation



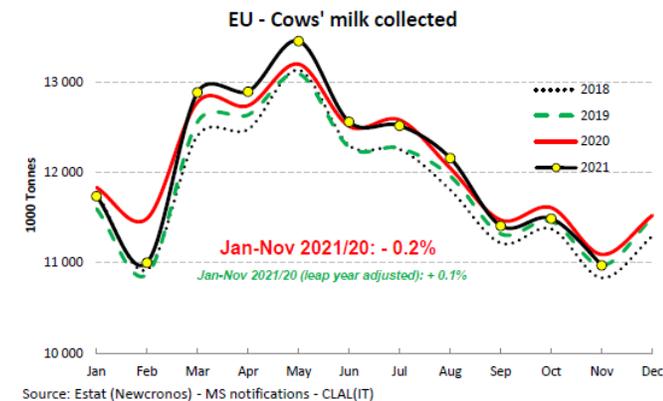
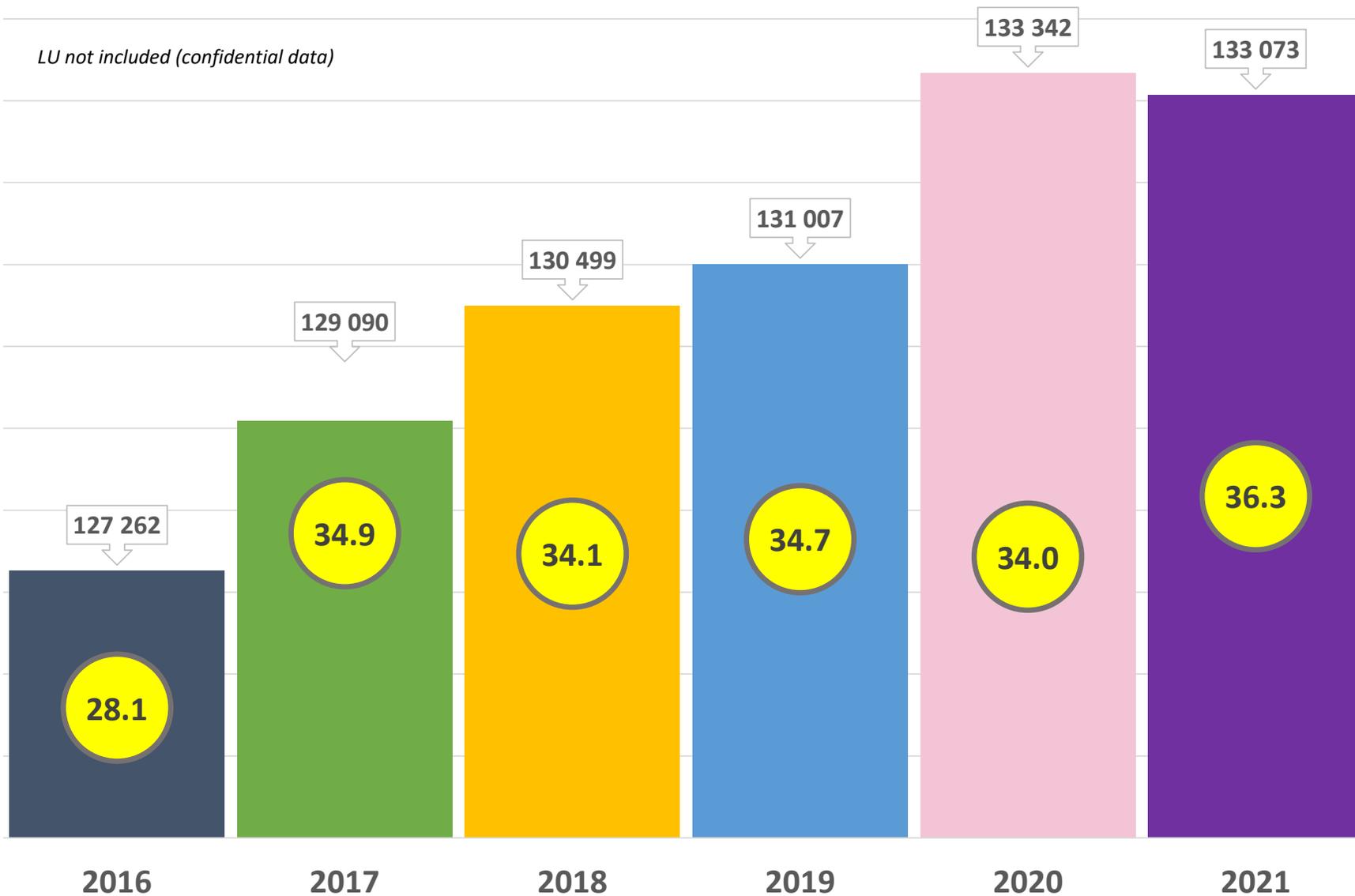
Brussels, 8 February 2022

Outline

- ❑ EU-27 milk deliveries and prices
- ❑ Yield of EU dairy cows
- ❑ Milk production of main exporting countries
- ❑ EU dairy productions
- ❑ Margins, feed costs, input/output
- ❑ Production value
- ❑ Organic milk prices and production
- ❑ EU dairy products prices
- ❑ EU and world quotations
- ❑ Dairy trade

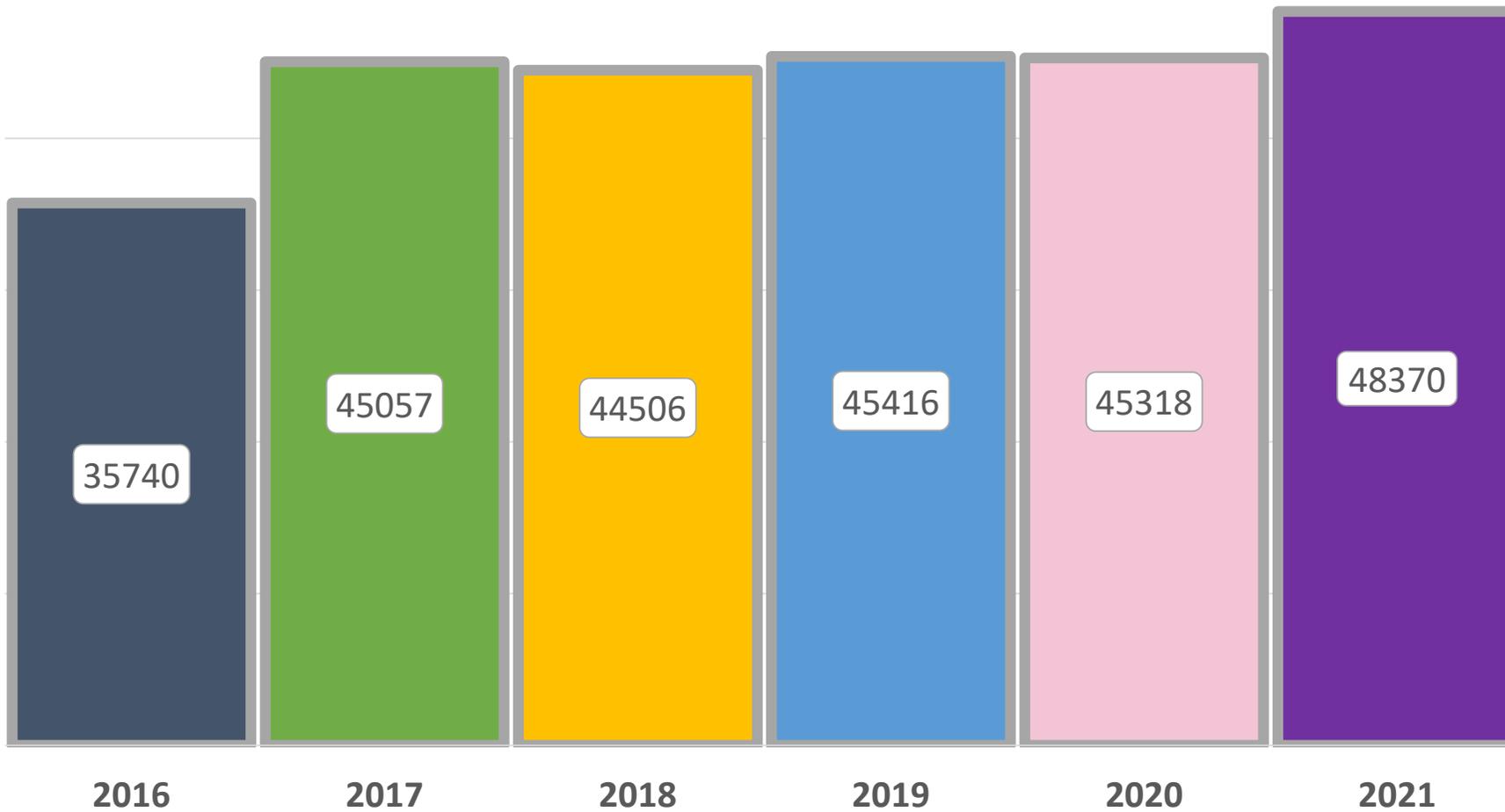
EU-27 milk deliveries and price Jan-Nov 2016-21 (x1000 t, c/kg)

LU not included (confidential data)



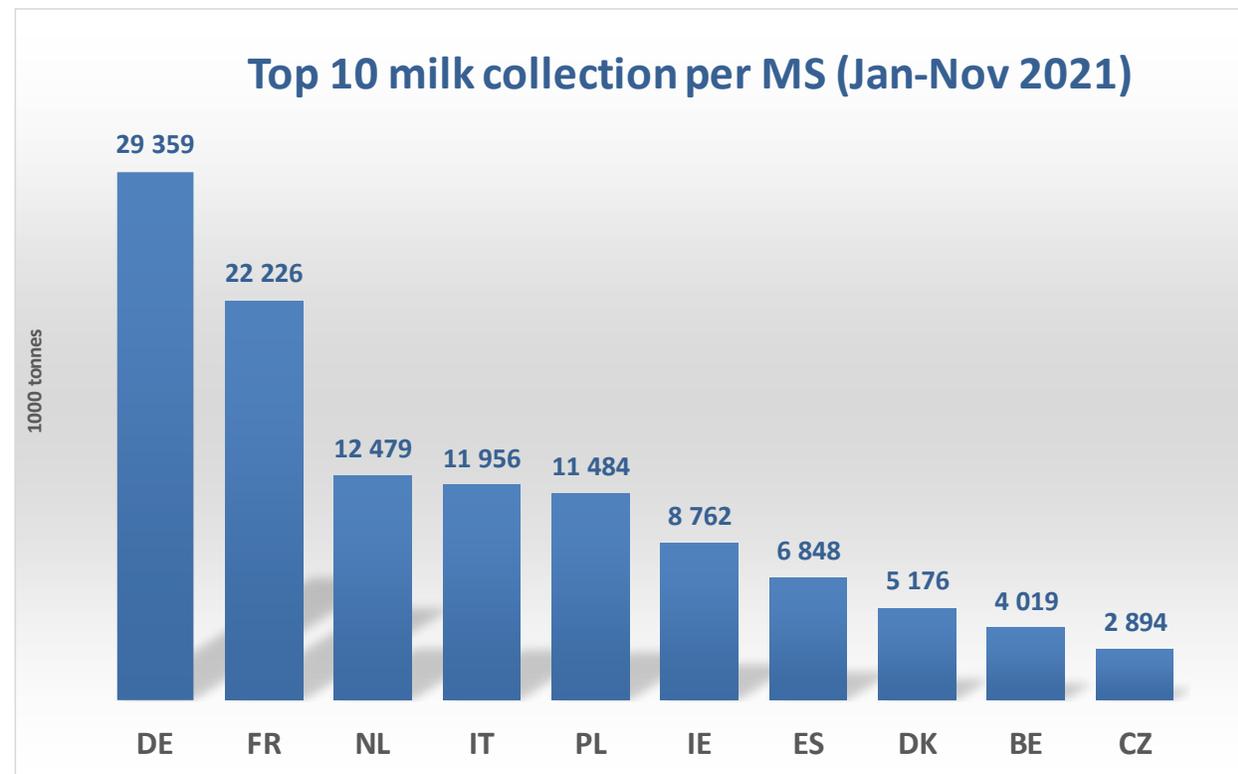
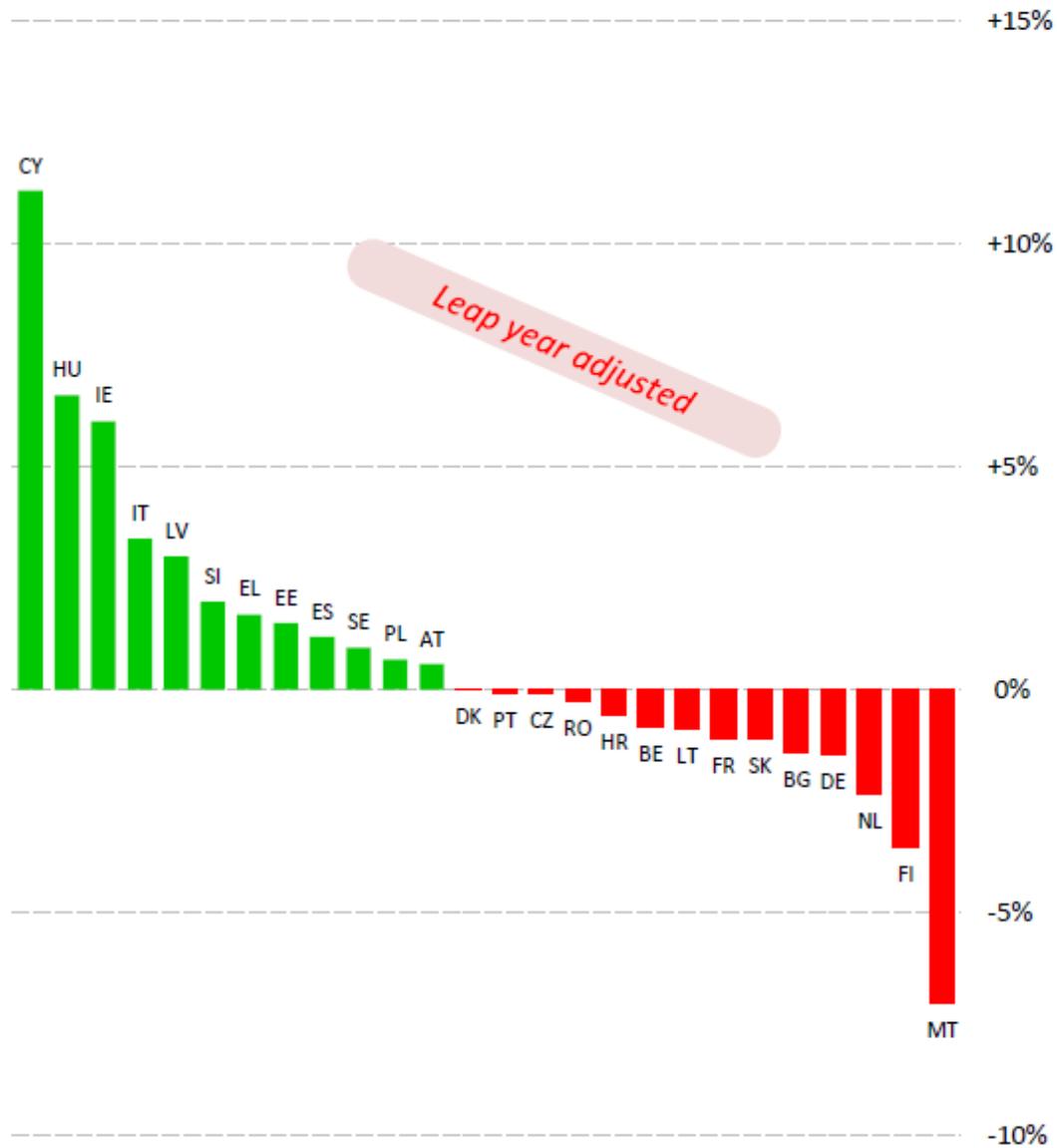
EU-27 value milk production
Jan-Nov 2016-21 (x million €)

LU not included (confidential data)



Cows' milk collected

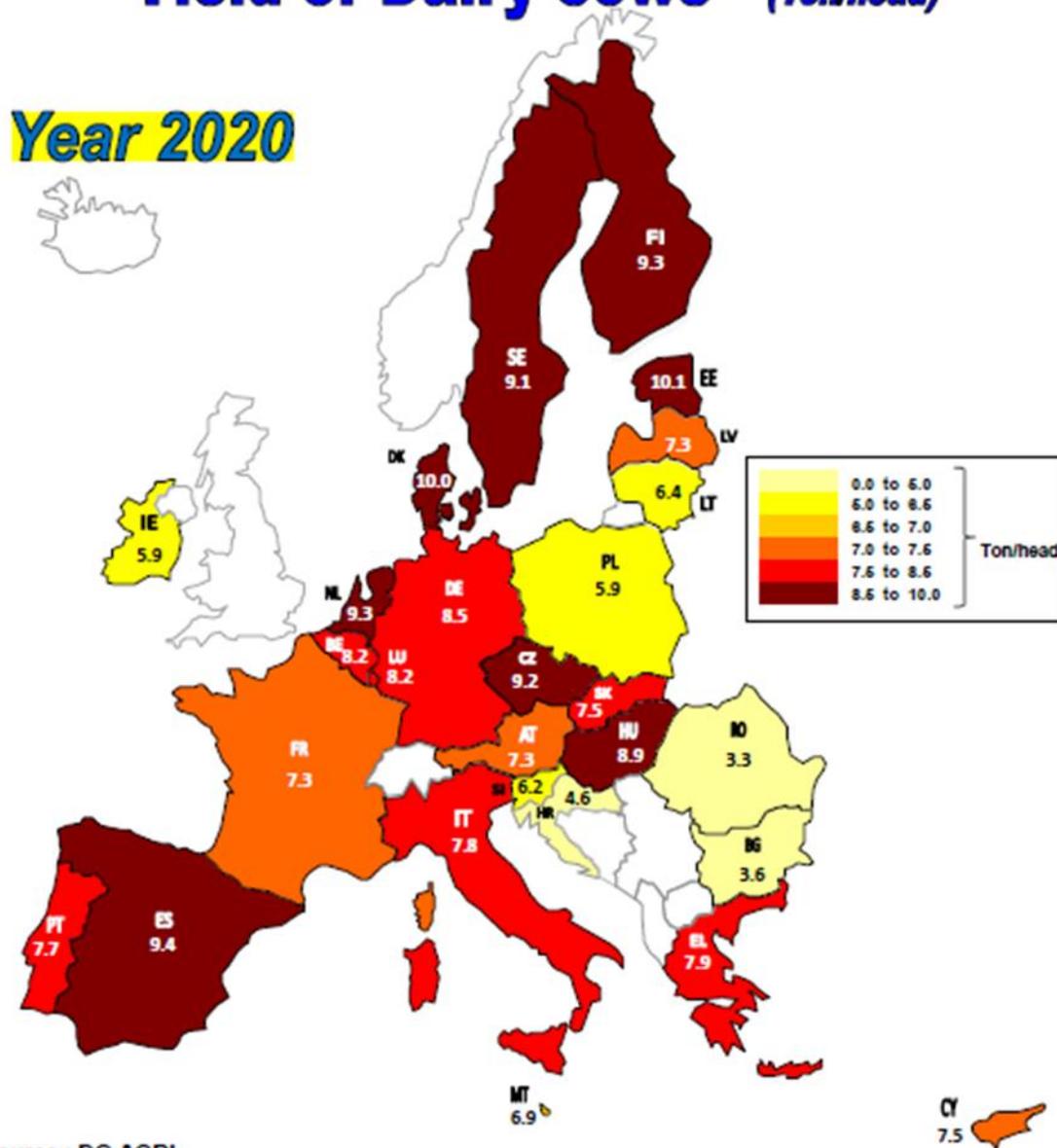
2021/20 Jan-Nov (y/y % chg)



Source: Estat (Newcronos) - MS notifications

Yield of Dairy cows - (Ton/head)

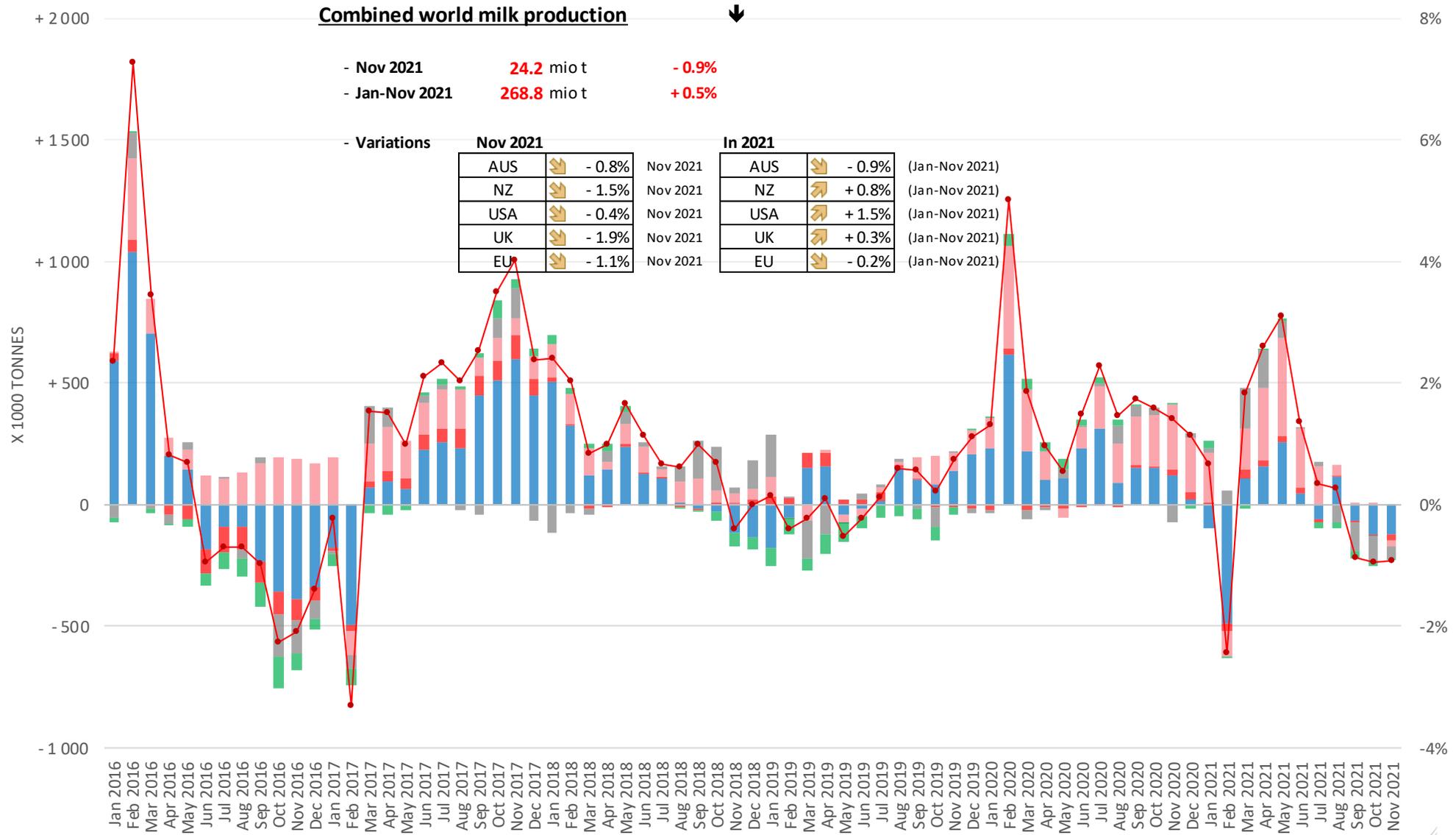
Year 2020



Source : DG AGRI

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

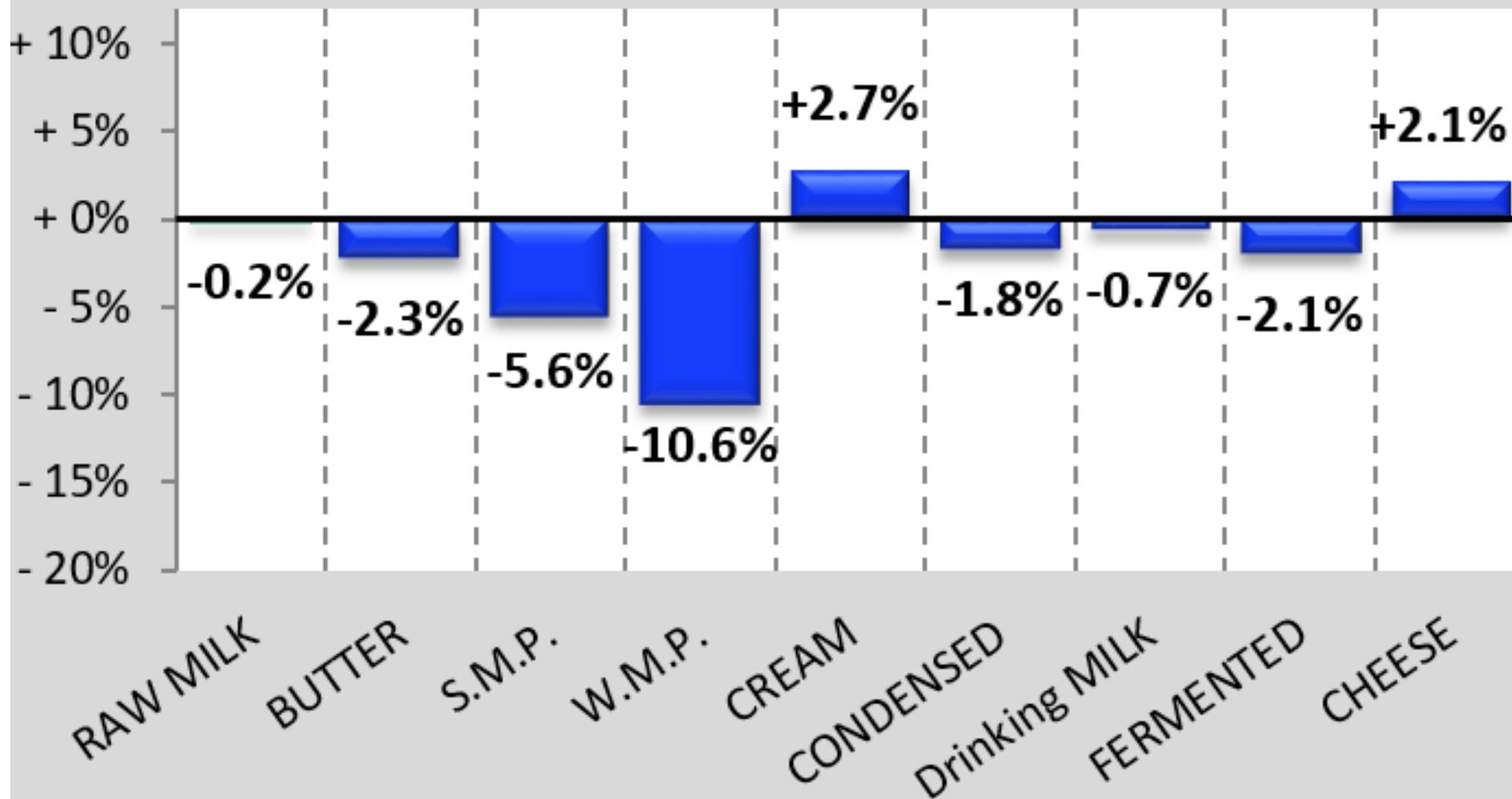
EU*+UK+US+NZ+AUS COMBINED MILK PRODUCTION GROWTH



* not including LU (confidential data)

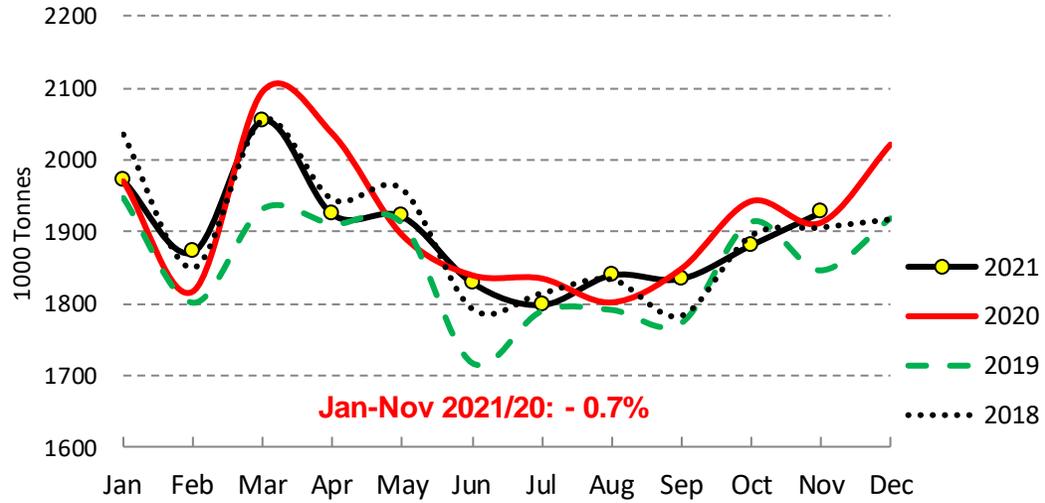
EU UK US NZ AUS Combined increase

EU Productions Jan-Nov 2021 compared to Jan-Nov 2020)



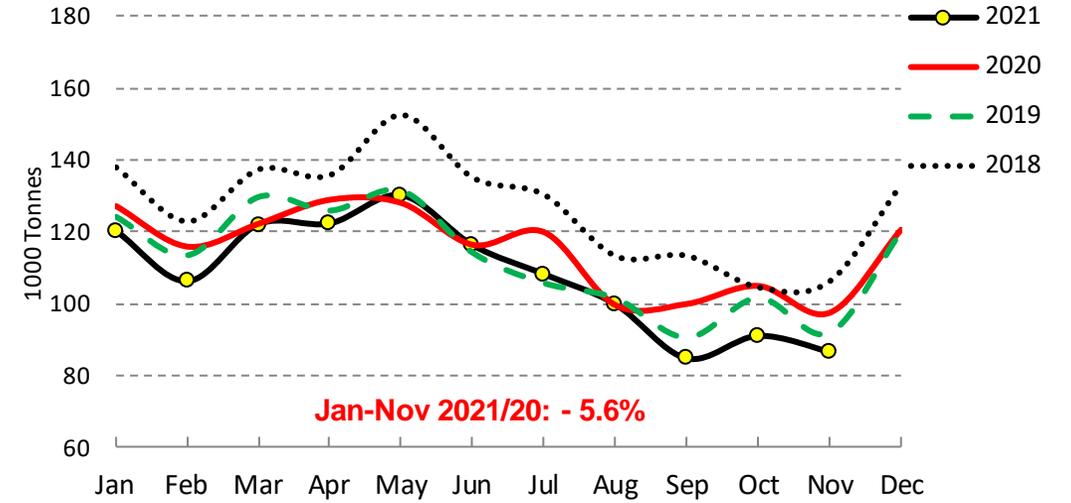
Data from some Member States are confidential and are not included in this table.

EU - Drinking milk



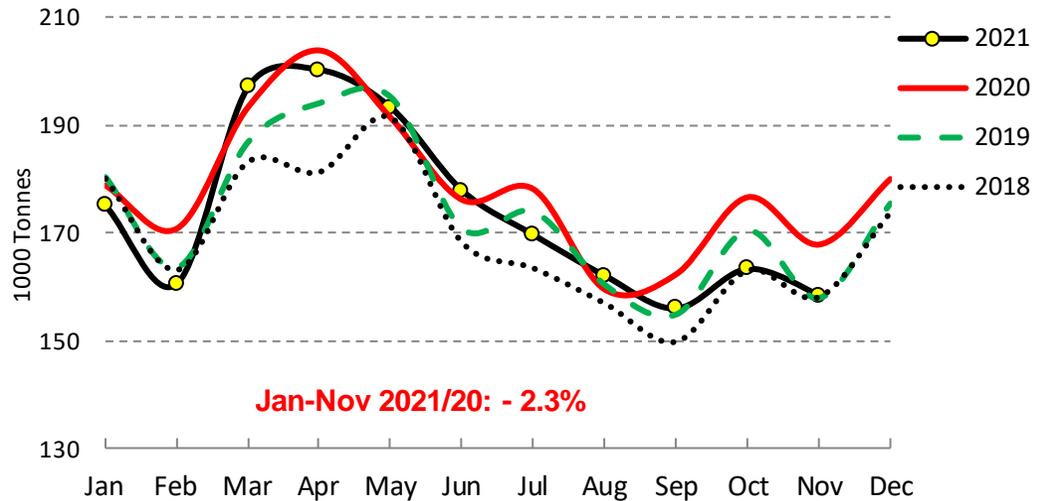
Source : Estat - Newcronos

EU - Skimmed-milk powder



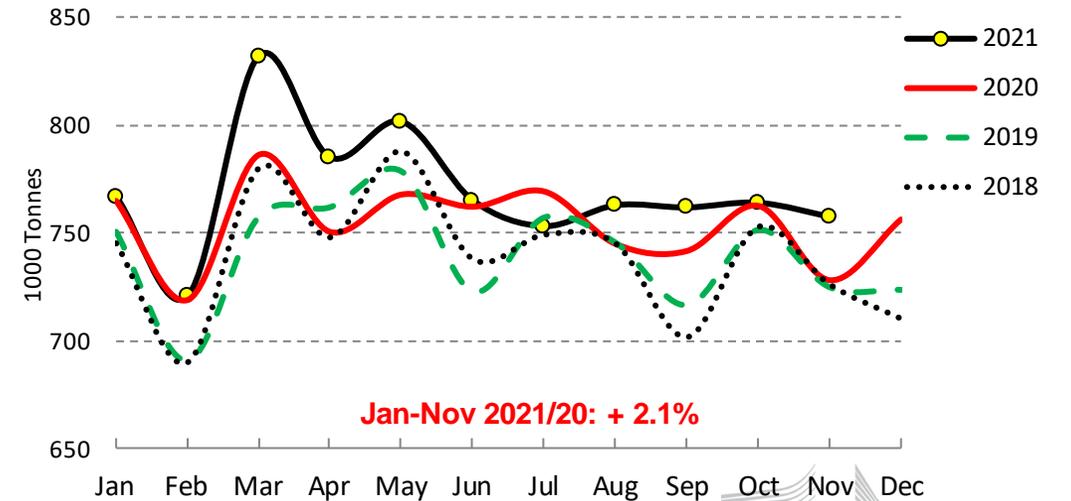
Source : Estat - Newcronos

EU - Total Butter



Source : Estat - Newcronos

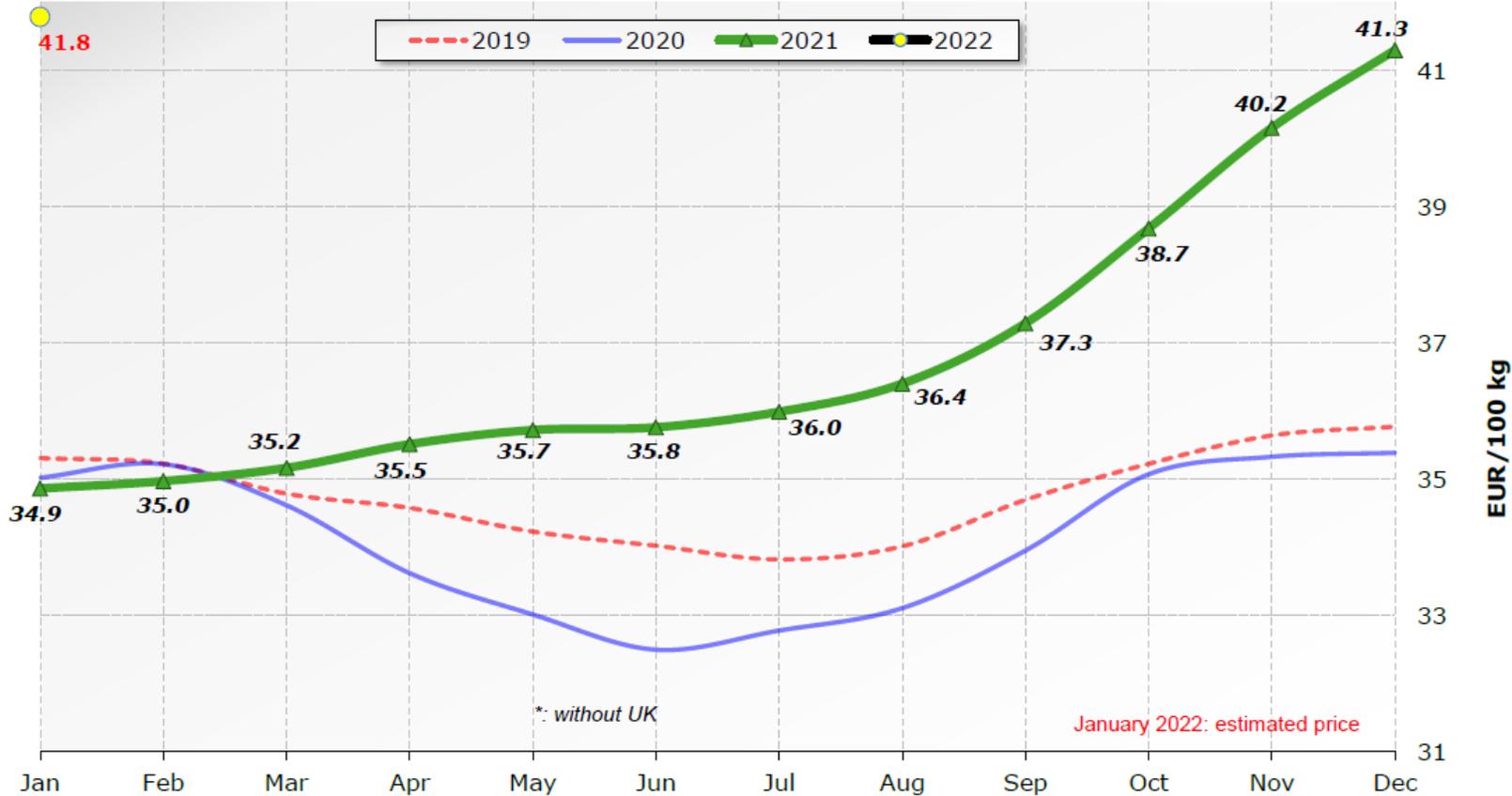
EU - Cheese



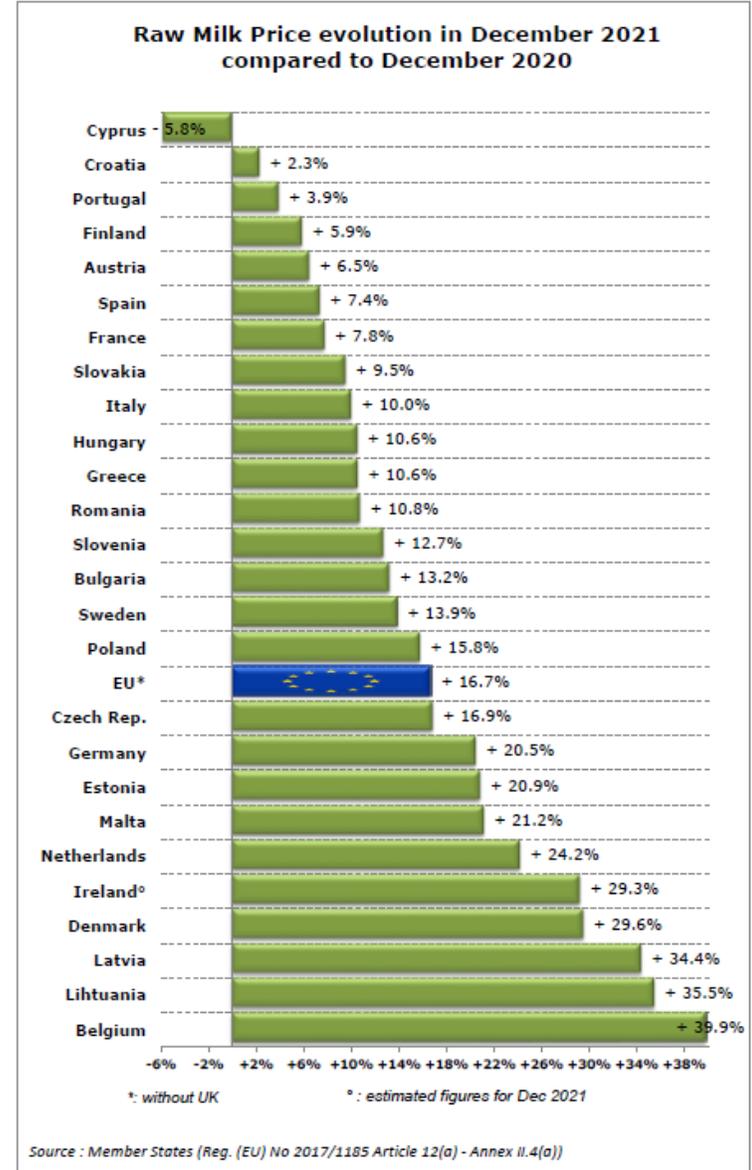
Source : Estat - Newcronos

EU milk prices paid to the producers

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



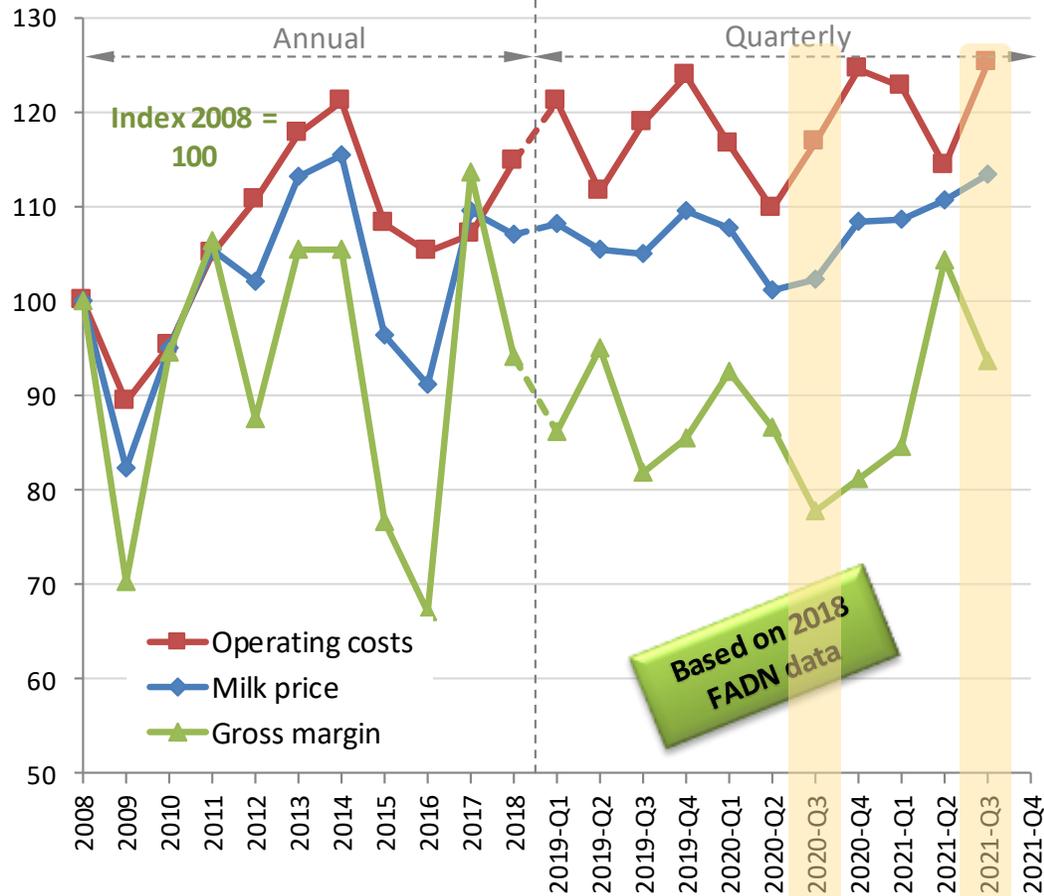
Source : Member States Reg. (EU) No 2017/1185 Article 12(a) - Annex II.4(a)



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

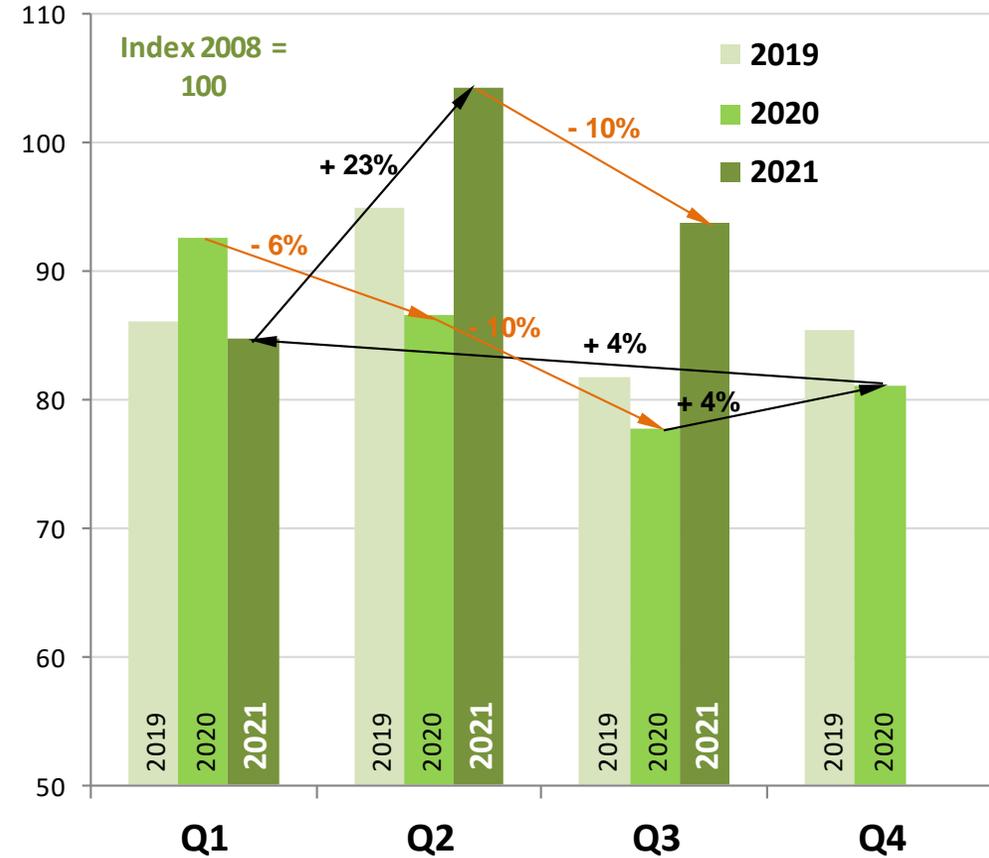
Margins

EU Milk price, operating costs and margin per tonne



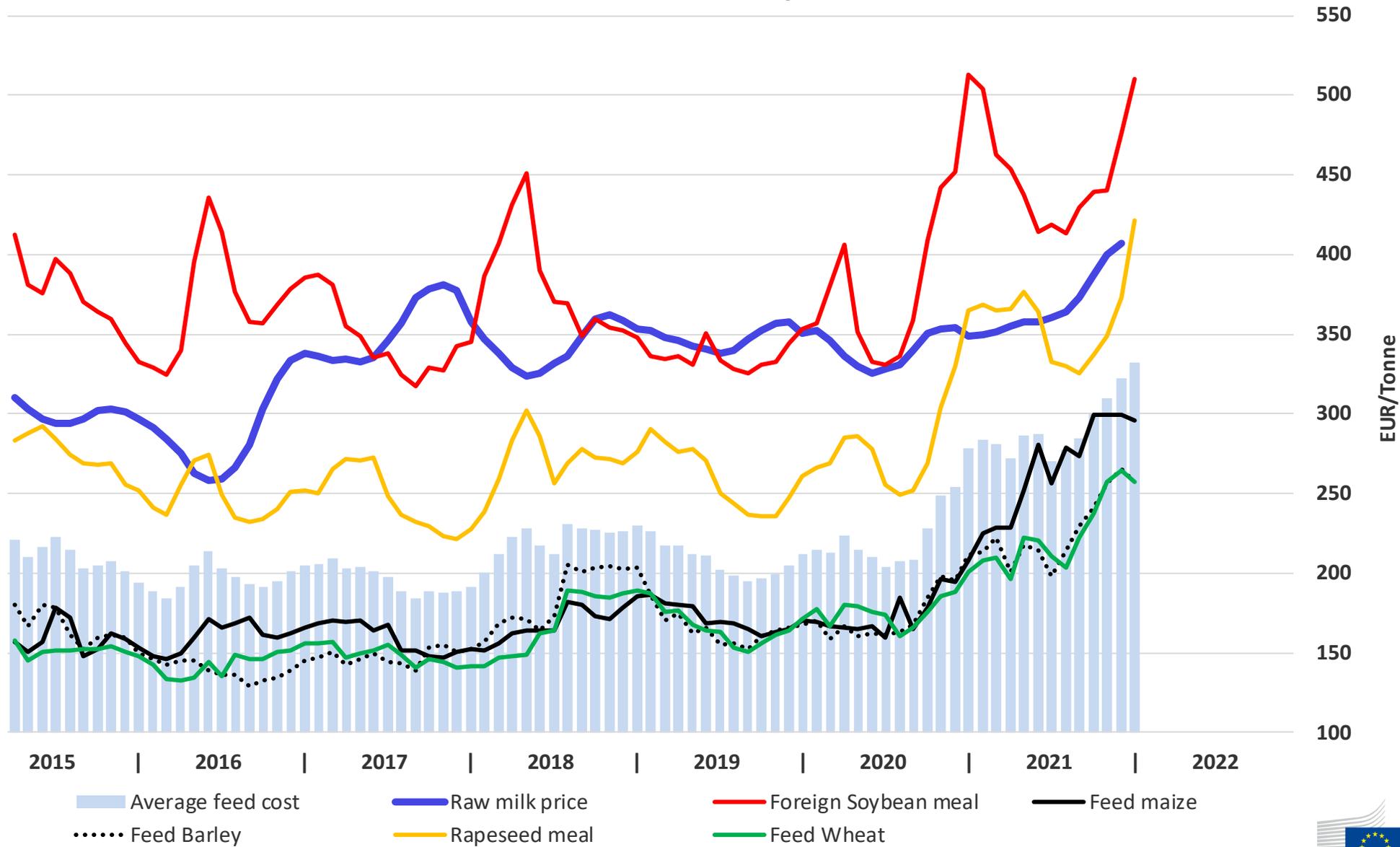
Source : FADN (base year 2018) + indexes (Eurostat, DG AGRI)

Estimation of EU Gross margin

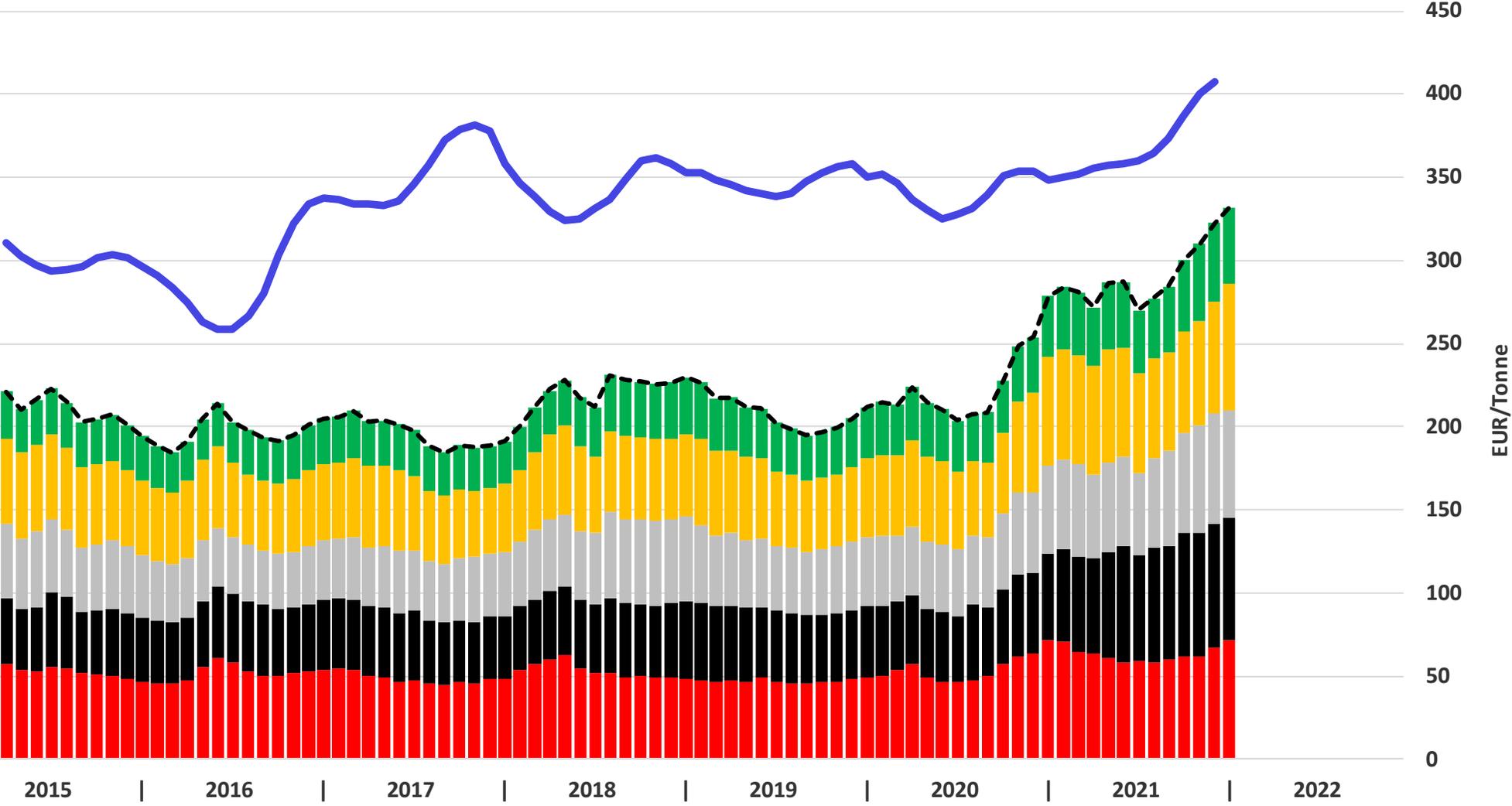


Source : FADN (base year 2018) + indexes (Eurostat, DG AGRI)

Feed cost in the Dairy sector

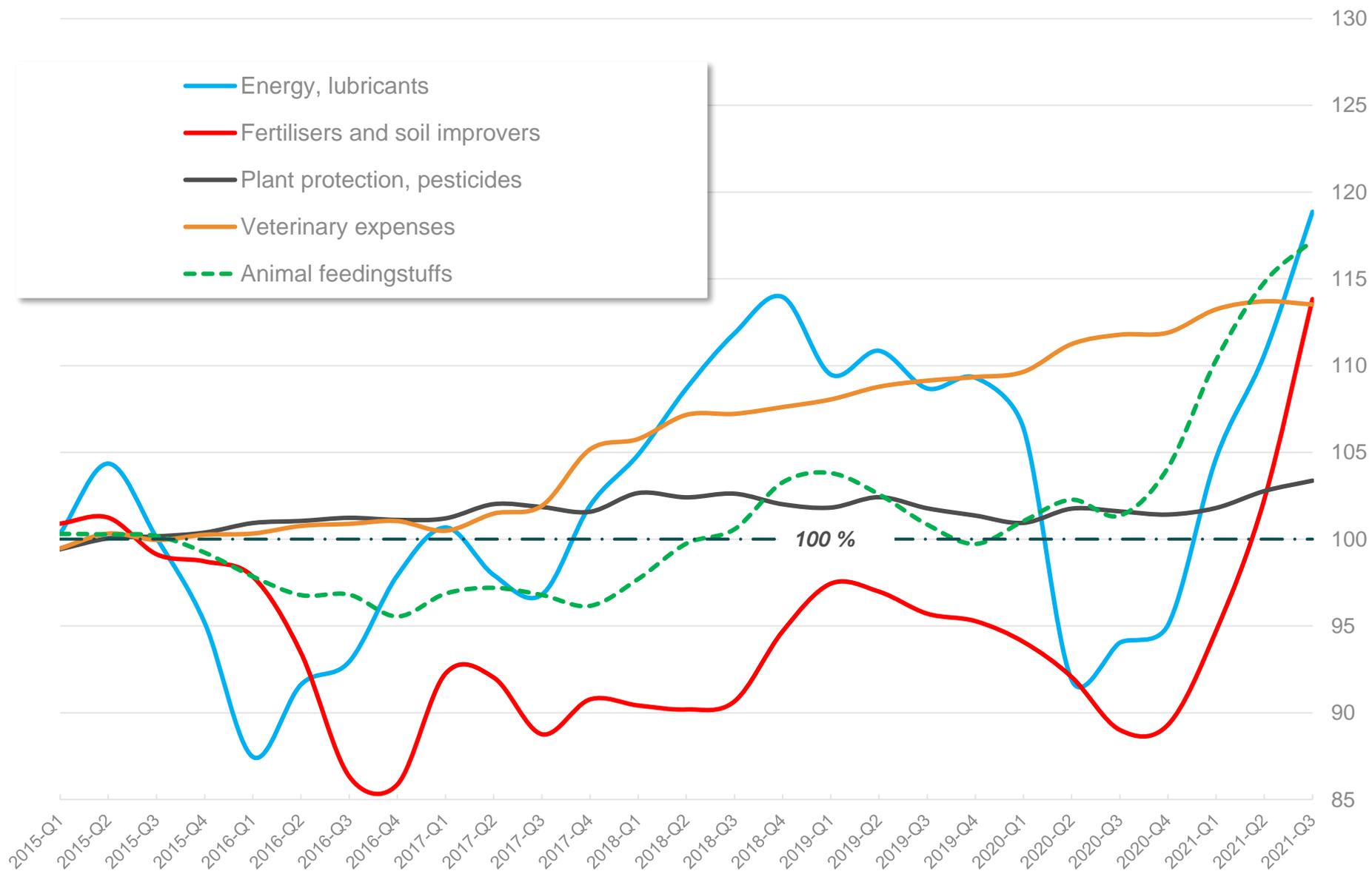


Composition of the DG AGRI feed diet in the dairy sector

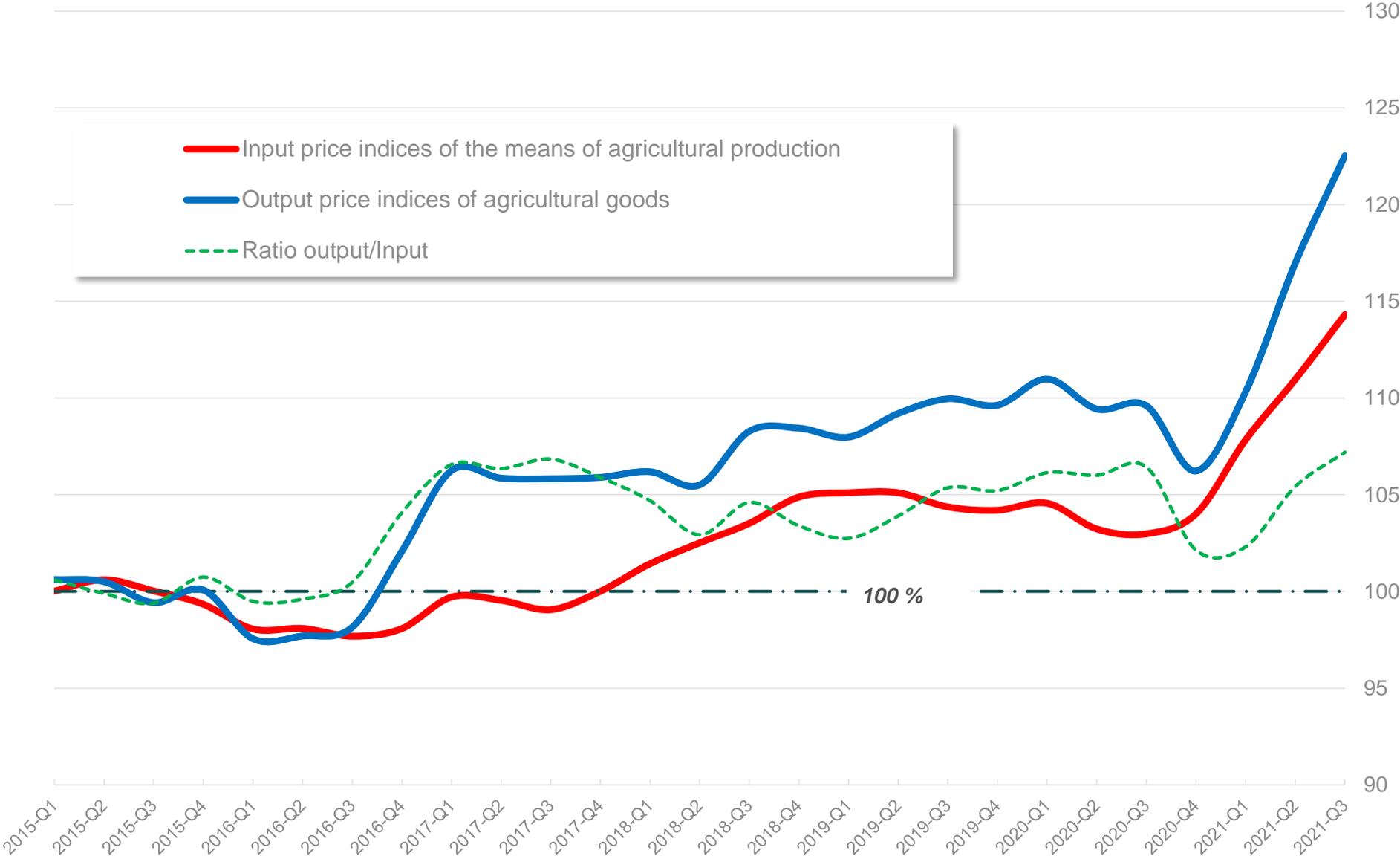


■ Foreign Soybean meal
 ■ Feed maize
 ■ Feed Barley
 ■ Rapeseed meal
 ■ Feed Wheat
 - - - Average feed cost
 — Raw milk price

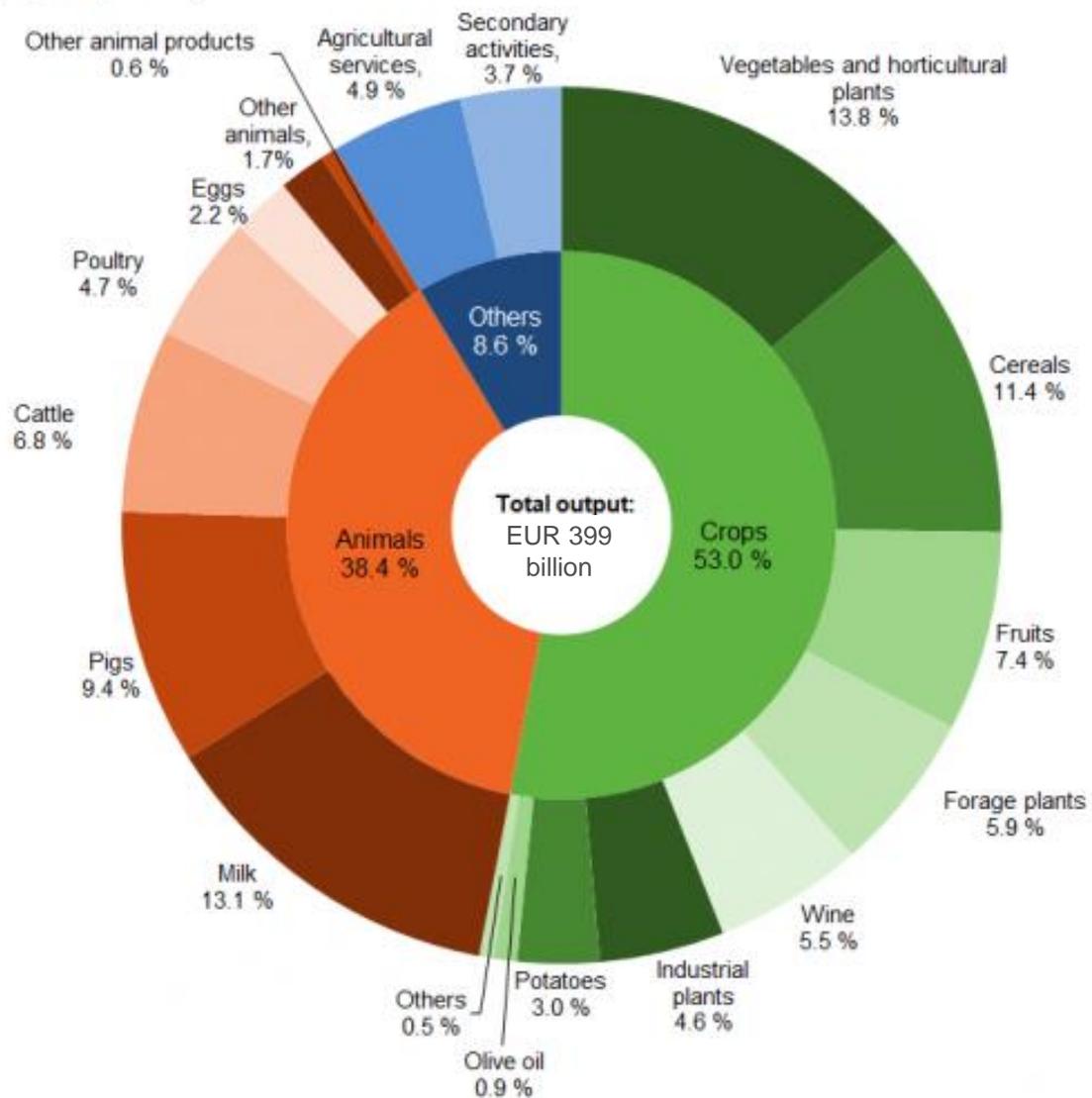
Price indices of the means of agricultural production (2015=100)



Input/Output Price indices of the means of agricultural production (2015=100)



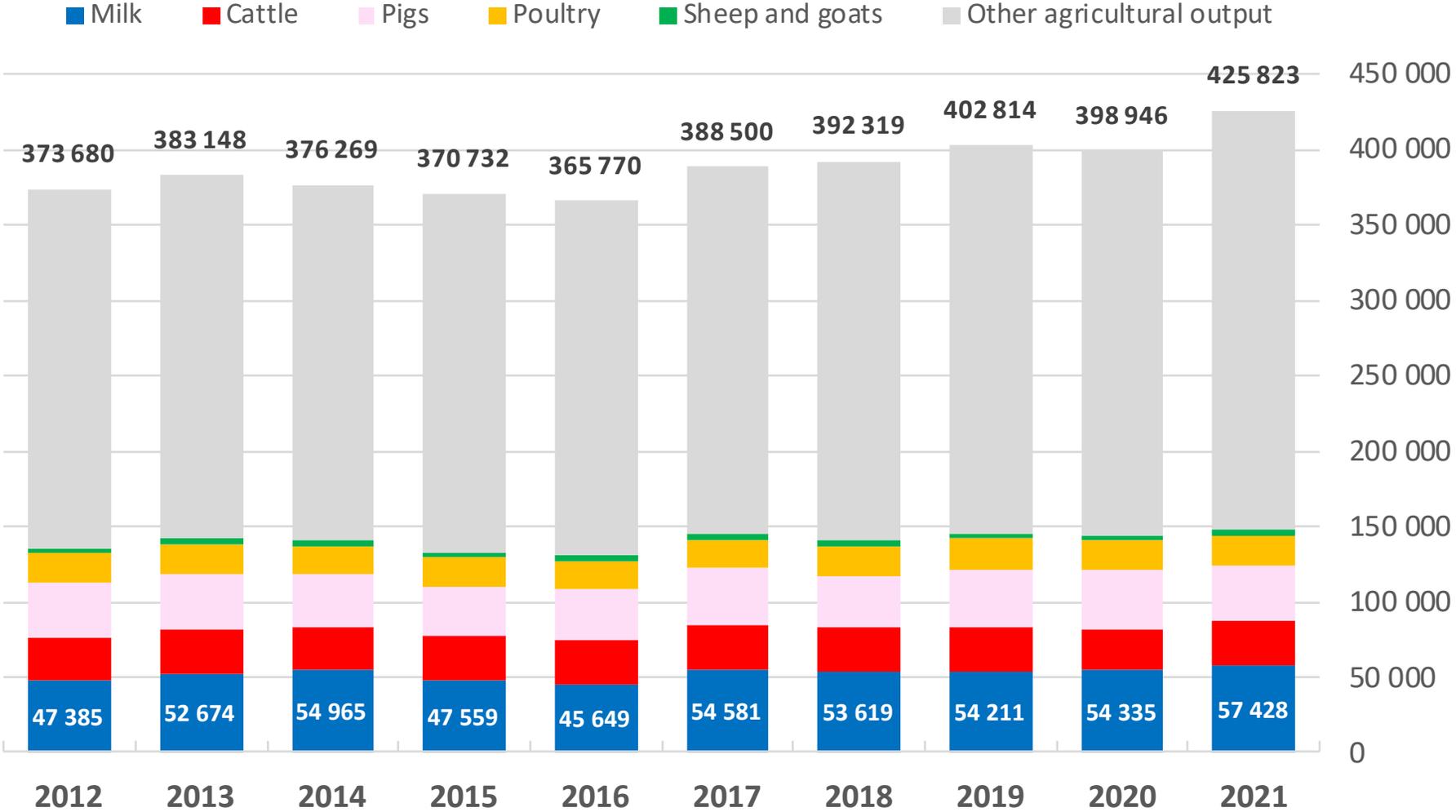
Output of the agricultural industry (% of total output, EU, 2020)



Note: values at basic prices.

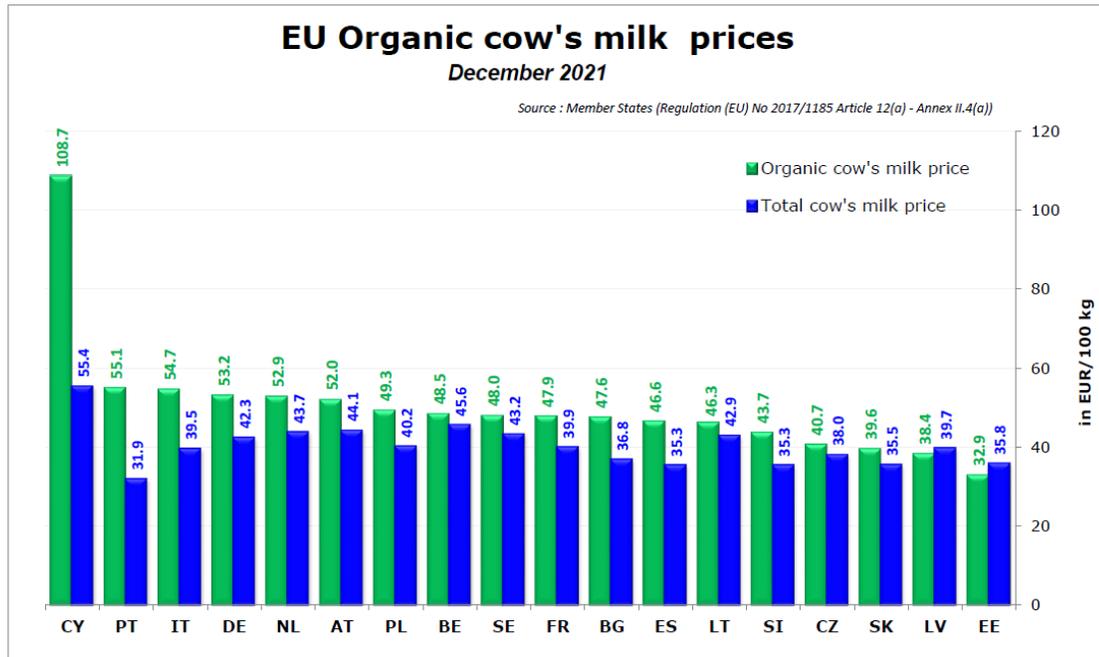
Source: Eurostat (online data code: aact_eaa01)

Production value (million EUR)

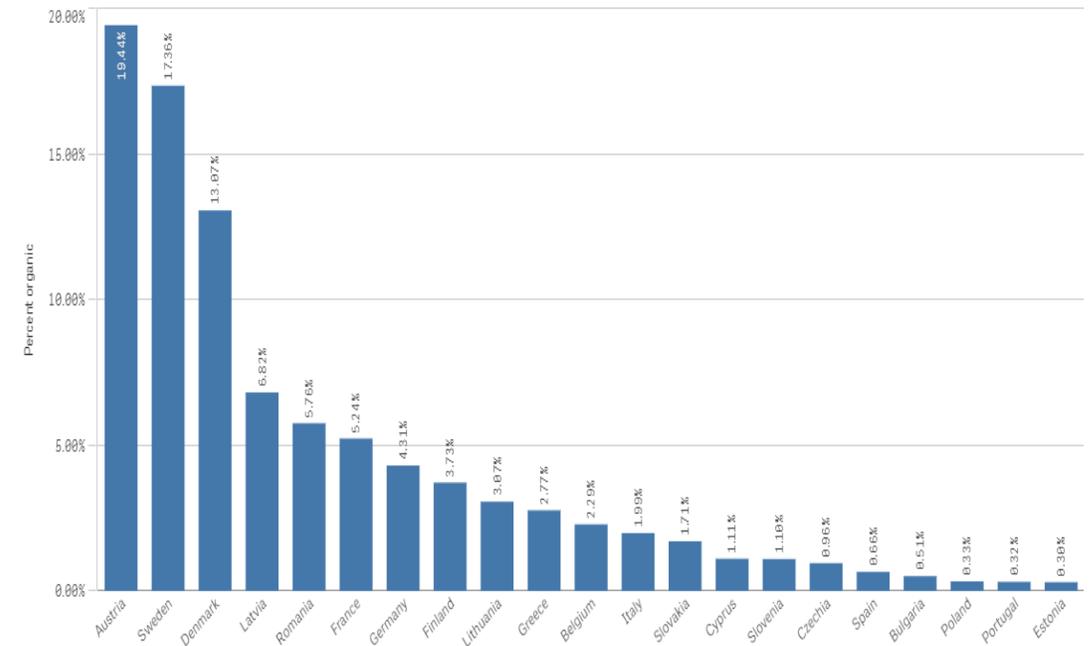


Source: Eurostat - Economic accounts for agriculture - values at current prices [AACT_EAA01]

EU organic raw milk production & prices



Organic raw cow's milk delivered to dairies as a percentage of total raw cow's milk
For years: 2021 > Months: 11 > All Member States

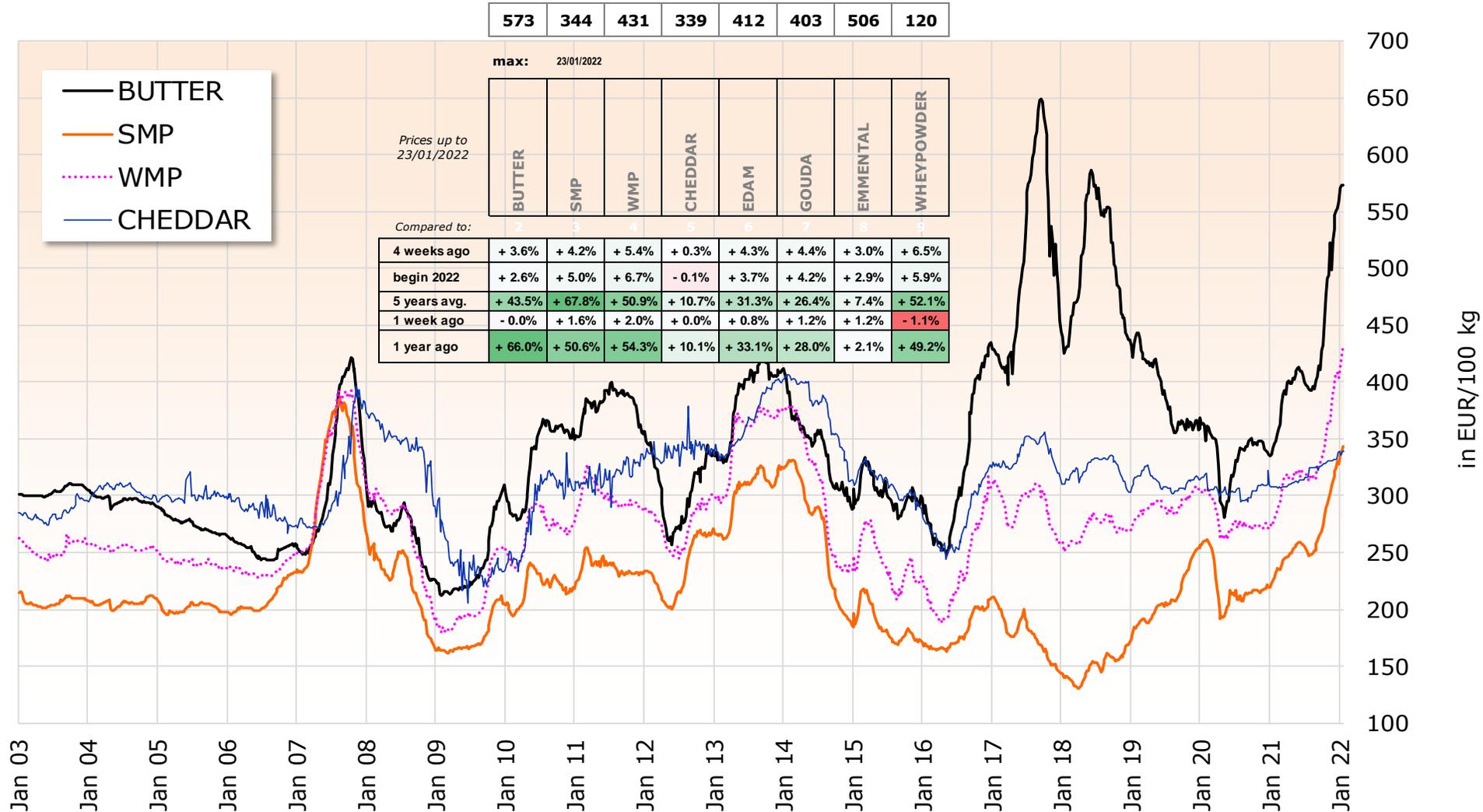


November 2021:

4.4% of total raw milk collected was organic (based on notifications from 21 MS)

EU evolutive* dairy Quotations

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



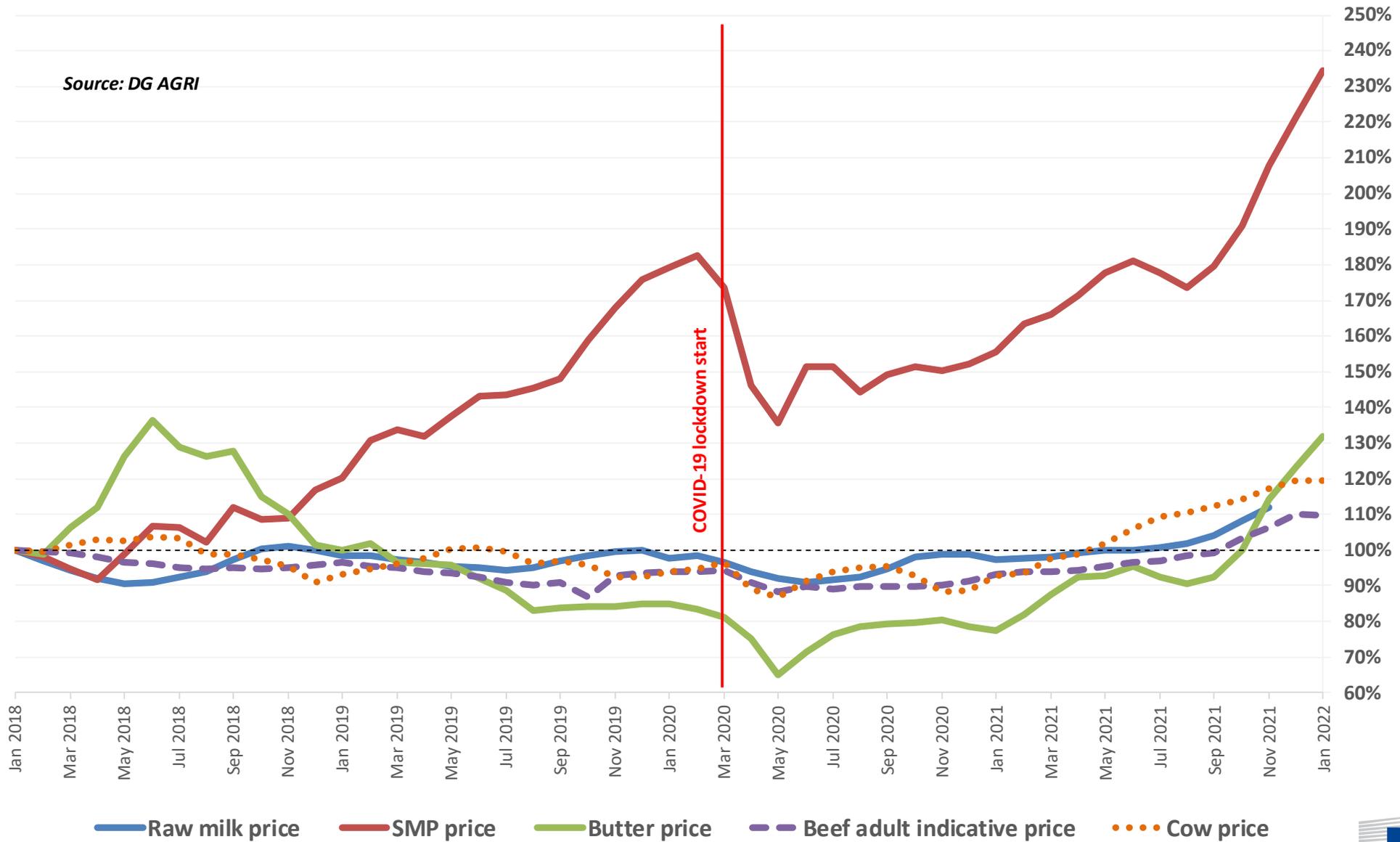
Source: Regulation (EU) No 2017/1185 Article 11 - Annex I.7



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

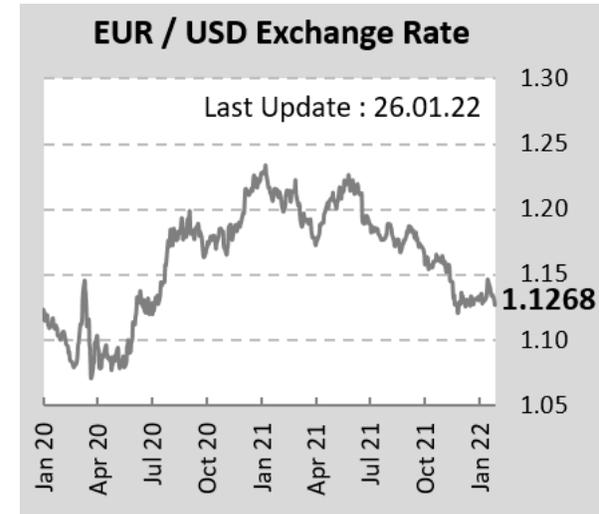
EU price index for selected commodities (January 2018 = 100 %)

Source: DG AGRI



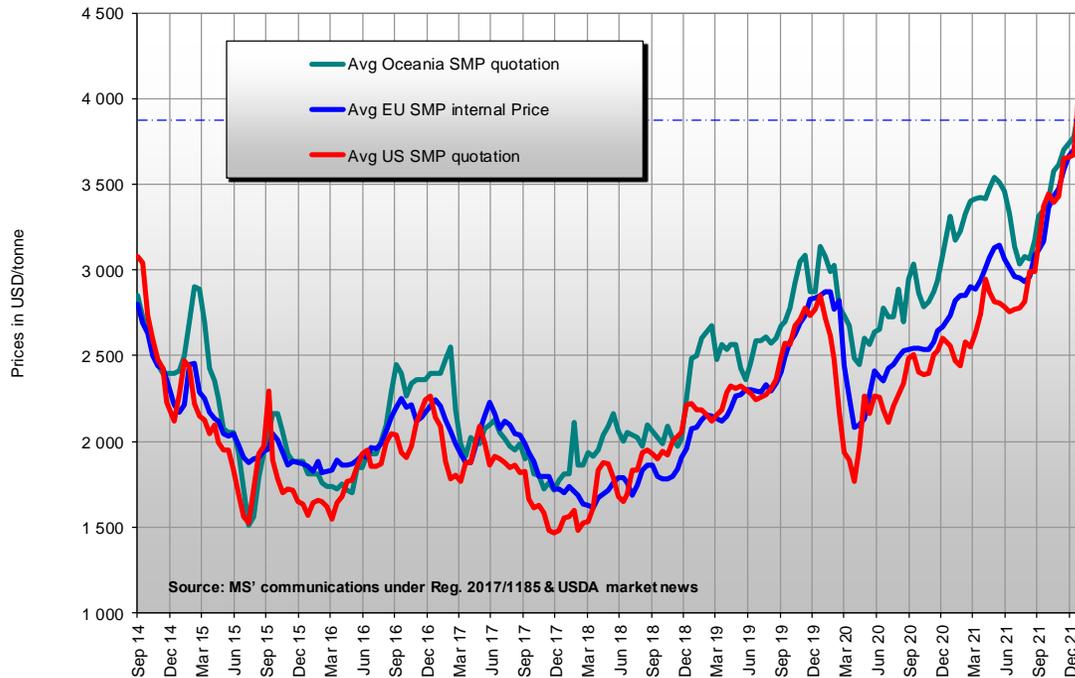
Latest world dairy quotations

In US\$/t	Latest Quotations			Week - 2						Year - 1					
	23/01/2022			09/01/2022			%change (previous quotation)			24 January 2021			%change (1 year)		
	EU*	Oceania	USA	EU*	Oceania	USA	EU*	Oceania	USA	EU*	Oceania	USA	EU*	Oceania	USA
Butter	6 564	6 025	6 337	6 329	5 900	5 880	+ 3.7%	+ 2.1%	+ 7.8%	4 148	4 763	2 836	+ 58%	+ 27%	+ 123%
SMP	3 870	3 950	4 037	3 705	3 775	3 675	+ 4.5%	+ 4.6%	+ 9.9%	2 736	3 313	2 562	+ 41%	+ 19%	+ 58%
WMP	4 838	4 050	4 624	4 575	3 863	4 123	+ 5.7%	+ 4.9%	+ 12.2%	3 344	3 375	3 583	+ 45%	+ 20%	+ 29%
Cheddar	3 876	5 625	4 066	3 843	5 513	4 456	+ 0.9%	+ 2.0%	- 8.7%	3 728	4 050	3 503	+ 4%	+ 39%	+ 16%



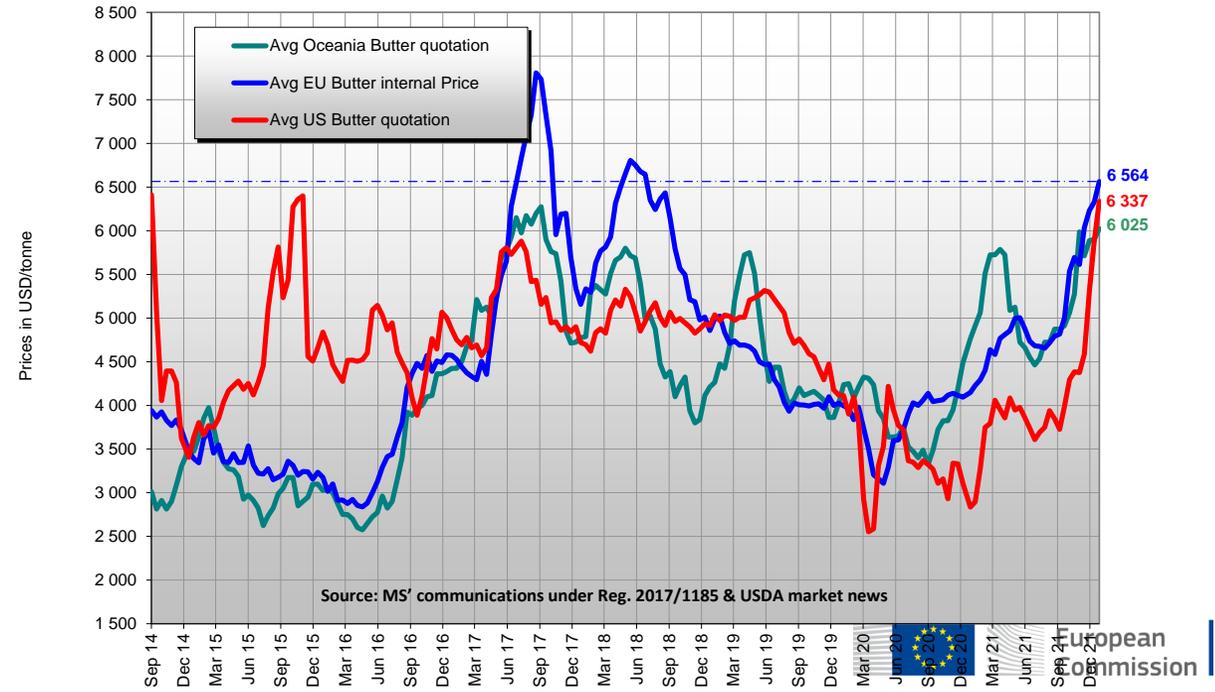
Source : Member States Notifications under Reg. 2017/1185, USDA

EU*/US/Oceania Quotations of SMP

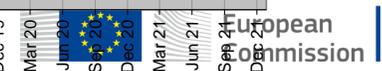


* EU evolutive

EU*/US/Oceania Quotations of Butter

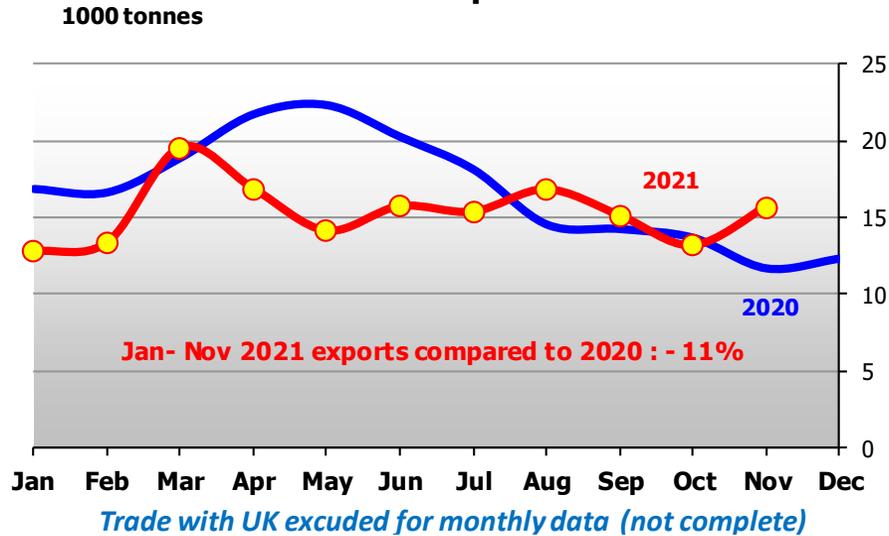


* EU evolutive

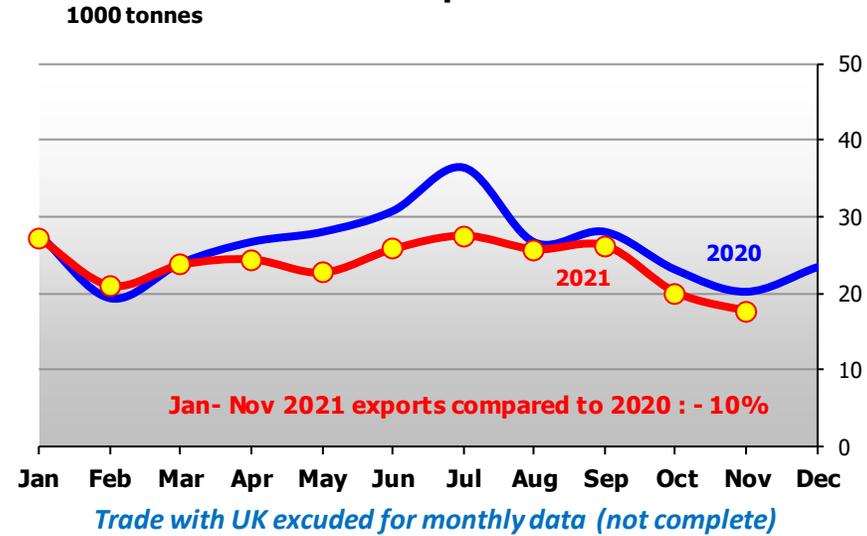


EU Dairy Exports to Third countries (January-November)

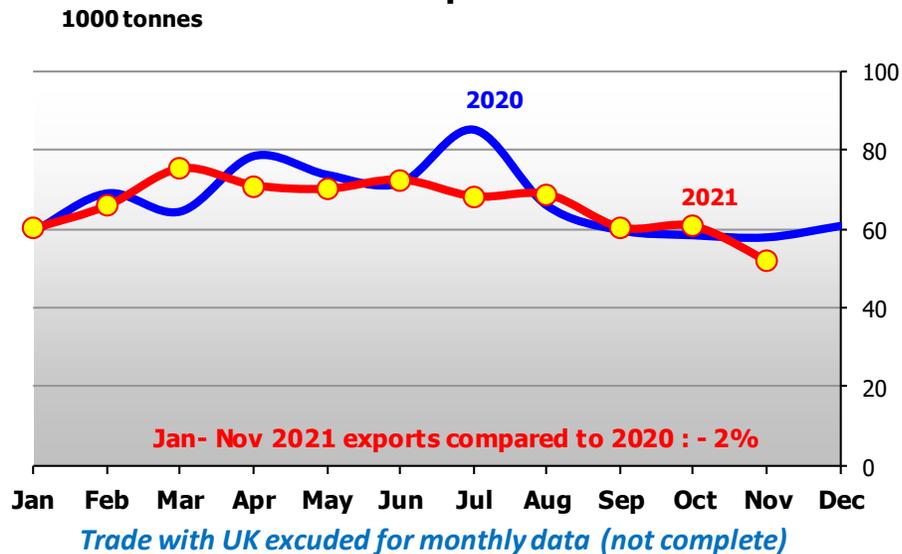
BUTTER exports



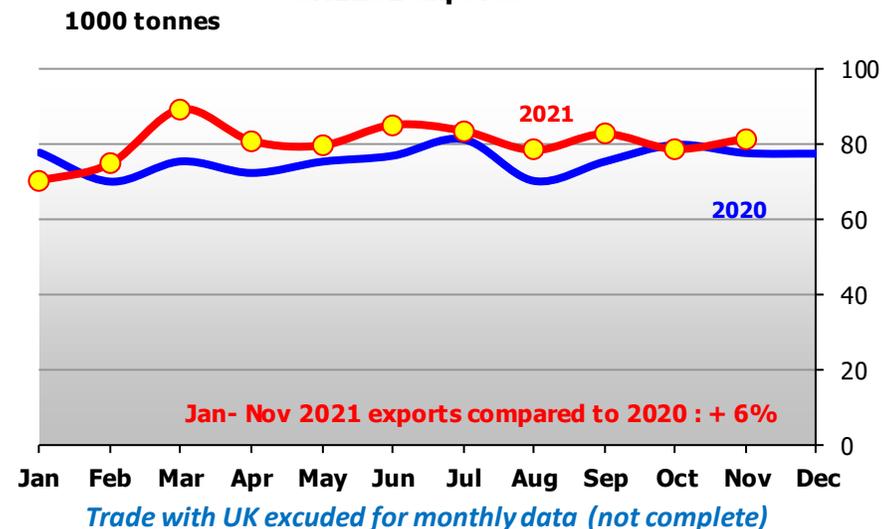
WMP exports



SMP exports



CHEESE exports



EU Exports of Dairy products- Main destinations

Source : COMEXT

Period : January-November

Quantity in Tonnes

EU EXPORTS of BUTTER - main destinations				
Period : January-November				
Qty Tons	2019	2020	2021	
USA	31 229	36 754	39 243	↑ + 7%
China	9 606	13 912	15 749	↑ + 13%
South Korea	4 548	7 007	9 831	↑ + 40%
Saudi Arabia	7 977	16 137	8 721	↓ - 46%
Morocco	5 254	9 531	7 861	↓ - 18%
Singapore	6 118	5 775	5 588	↓ - 3%
Taiwan	4 437	4 903	5 096	↑ + 4%
Israel	3 683	7 149	4 920	↓ - 31%
Ukraine	1 543	7 502	4 519	↓ - 40%
U.A.Emirates	10 459	5 962	4 455	↓ - 25%
Indonesia	4 768	3 188	3 651	↑ + 15%
Other	68 597	71 420	59 335	↓ - 17%
Total (without UK)	158 221	189 238	168 973	↓ - 11%
United Kingdom°	55 200	43 726	33 928	↓ - 22%

° Trade with U.K. only available up to October 2021

EU EXPORTS of CHEESES - main destinations				
Period : January-November				
Qty Tons	2019	2020	2021	
USA	123 212	108 198	123 186	↑ + 14%
Japan	104 321	117 648	109 297	↓ - 7%
Switzerland	57 044	63 493	66 895	↑ + 5%
Ukraine	20 866	42 498	47 832	↑ + 13%
South Korea	38 020	48 183	45 728	↓ - 5%
Saudi Arabia	31 955	38 519	38 208	→ - 1%
China	17 444	24 760	36 236	↑ + 46%
Australia	23 147	24 753	24 936	→ + 1%
Canada	20 030	22 714	24 151	↑ + 6%
Egypt	16 503	18 245	20 503	↑ + 12%
Norway	14 591	15 672	20 137	↑ + 28%
Other	306 286	306 394	326 399	↑ + 7%
Total (without UK)	773 419	831 077	883 510	↑ + 6%
United Kingdom°	431 985	403 819	358 573	↓ - 11%

° Trade with U.K. only available up to October 2021

EU EXPORTS of SMP - main destinations				
Period : January-November				
Qty Tons	2019	2020	2021	
China	115 566	109 420	119 200	↑ + 9%
Algeria	85 946	113 979	88 440	↓ - 22%
Indonesia	70 790	41 432	61 096	↑ + 47%
Philippines	63 861	39 399	46 839	↑ + 19%
Nigeria	38 923	41 252	42 711	→ + 4%
Malaysia	47 382	36 632	37 870	→ + 3%
Egypt	52 009	39 965	32 252	↓ - 19%
Yemen	25 929	27 835	26 512	↓ - 5%
Thailand	28 273	20 707	23 783	↑ + 15%
Saudi Arabia	32 738	28 571	22 337	↓ - 22%
Vietnam	26 059	18 000	18 776	→ + 4%
Other	279 210	225 373	204 765	↓ - 9%
Total (without UK)	866 687	742 564	724 580	↓ - 2%
United Kingdom°	18 749	22 749	11 746	↓ - 48%

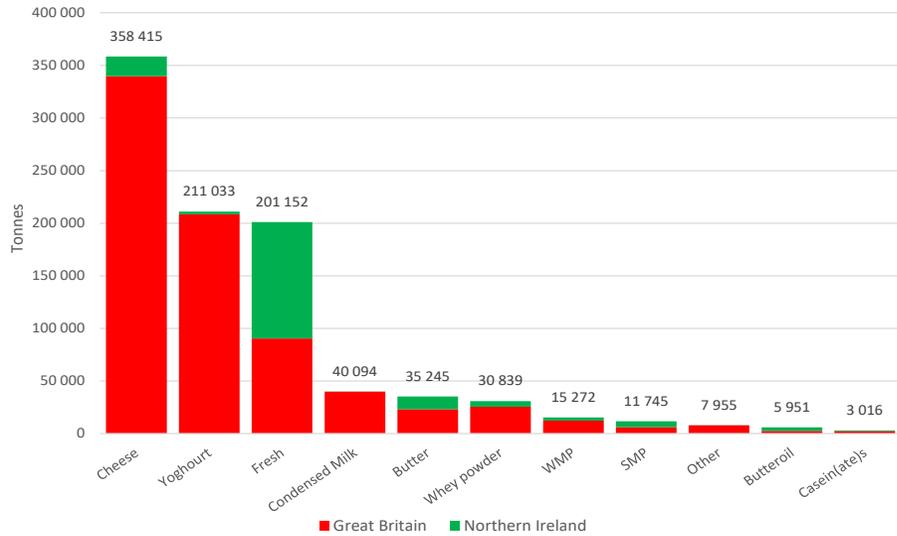
° Trade with U.K. only available up to October 2021

EU EXPORTS of WMP - main destinations				
Period : January-November				
Qty Tons	2019	2020	2021	
Oman	38 140	43 686	37 433	↓ - 14%
Nigeria	16 624	20 196	24 858	↑ + 23%
China	14 700	15 343	20 703	↑ + 35%
Algeria	16 596	36 936	16 080	↓ - 56%
U.A.Emirates	6 554	7 974	10 697	↑ + 34%
Senegal	5 713	6 995	9 519	↑ + 36%
Singapore	7 662	6 886	7 773	↑ + 13%
Bangladesh	4 980	4 198	6 525	↑ + 55%
Saudi Arabia	7 666	7 308	6 306	↓ - 14%
Dominican R.	7 248	9 226	6 177	↓ - 33%
Ivory Coast	3 410	3 434	5 385	↑ + 57%
Other	130 775	128 795	109 881	↓ - 15%
Total (without UK)	260 069	290 975	261 336	↓ - 10%
United Kingdom°	28 709	25 812	15 277	↓ - 41%

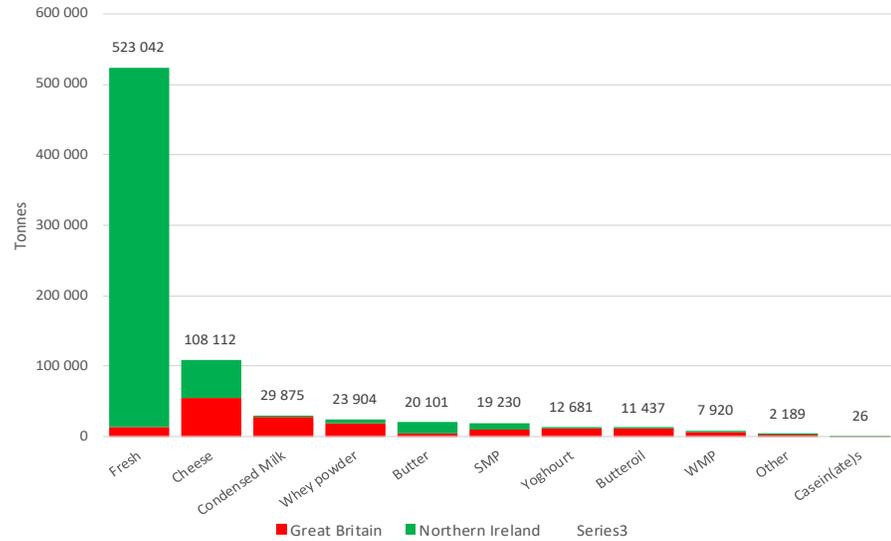
° Trade with U.K. only available up to October 2021

EU dairy trade with UK

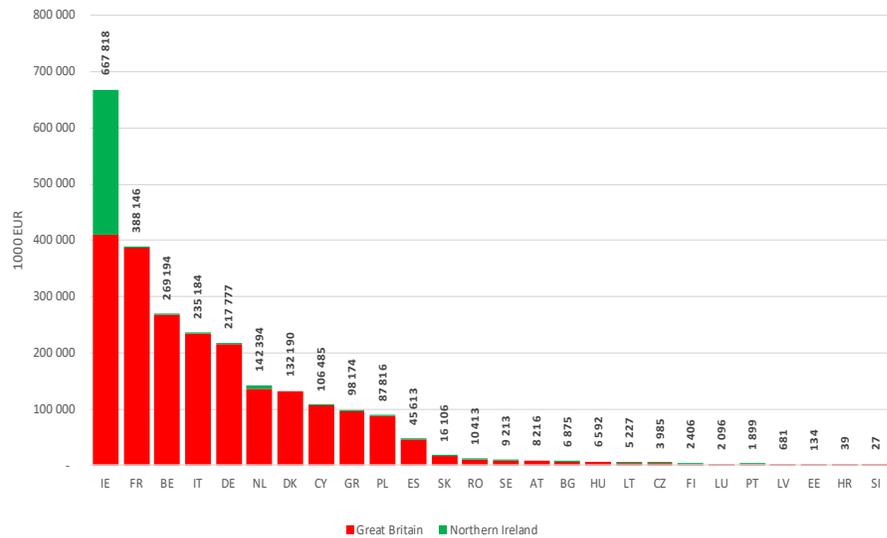
EU Exports of Dairy products to U.K. from January to October 2021



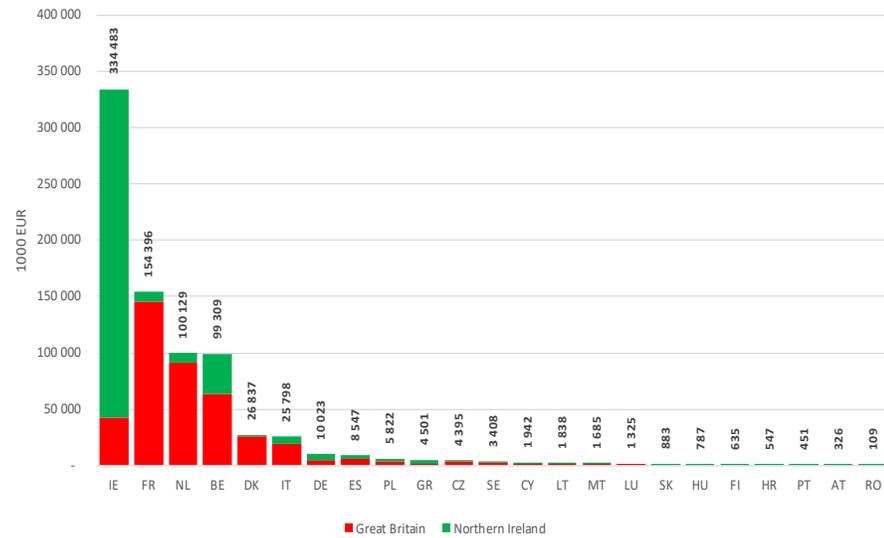
EU Imports of Dairy products from U.K. from January to October 2021



EU Exports of Dairy products to U.K. from January to October 2021



EU Imports of Dairy products from U.K. from January to October 2021



EU dairy trade with UK

EU EXPORTS of main dairy products to U.K. up to October 2021

In Tons

	2019			2020			2021			% 2021/2020	
	U.K.	Extra-EU	%	U.K.	Extra-EU	%	U.K.	Extra-EU	%	U.K.	Extra-EU
BUTTER	55 200	195 411	28%	43 726	221 253	20%	33 928	187 165	18%	-22%	-15%
BUTTEROIL	19 159	43 196	44%	12 676	40 949	31%	6 915	28 594	24%	-45%	-30%
CHEESES	431 985	1 132 799	38%	403 819	1 157 324	35%	358 573	1 160 729	31%	-11%	+0%
SMP	18 749	827 843	2%	22 749	707 664	3%	11 746	684 465	2%	-48%	-3%
WMP	28 709	267 688	11%	25 812	296 556	9%	15 277	258 982	6%	-41%	-13%
WHEYPOWDER	46 153	531 022	9%	43 580	573 469	8%	30 839	599 439	5%	-29%	+5%
FRESH	295 303	1 270 582	23%	269 719	1 340 638	20%	198 941	1 393 775	14%	-26%	+4%
CONDENSED	48 700	280 912	17%	48 990	277 379	18%	40 099	277 324	14%	-18%	-0%
CASEINES	3 330	70 867	5%	2 870	67 800	4%	3 019	76 813	4%	+5%	+13%
LACTOSE	5 459	201 844	3%	3 893	244 462	2%	8 506	229 737	4%	+118%	-6%

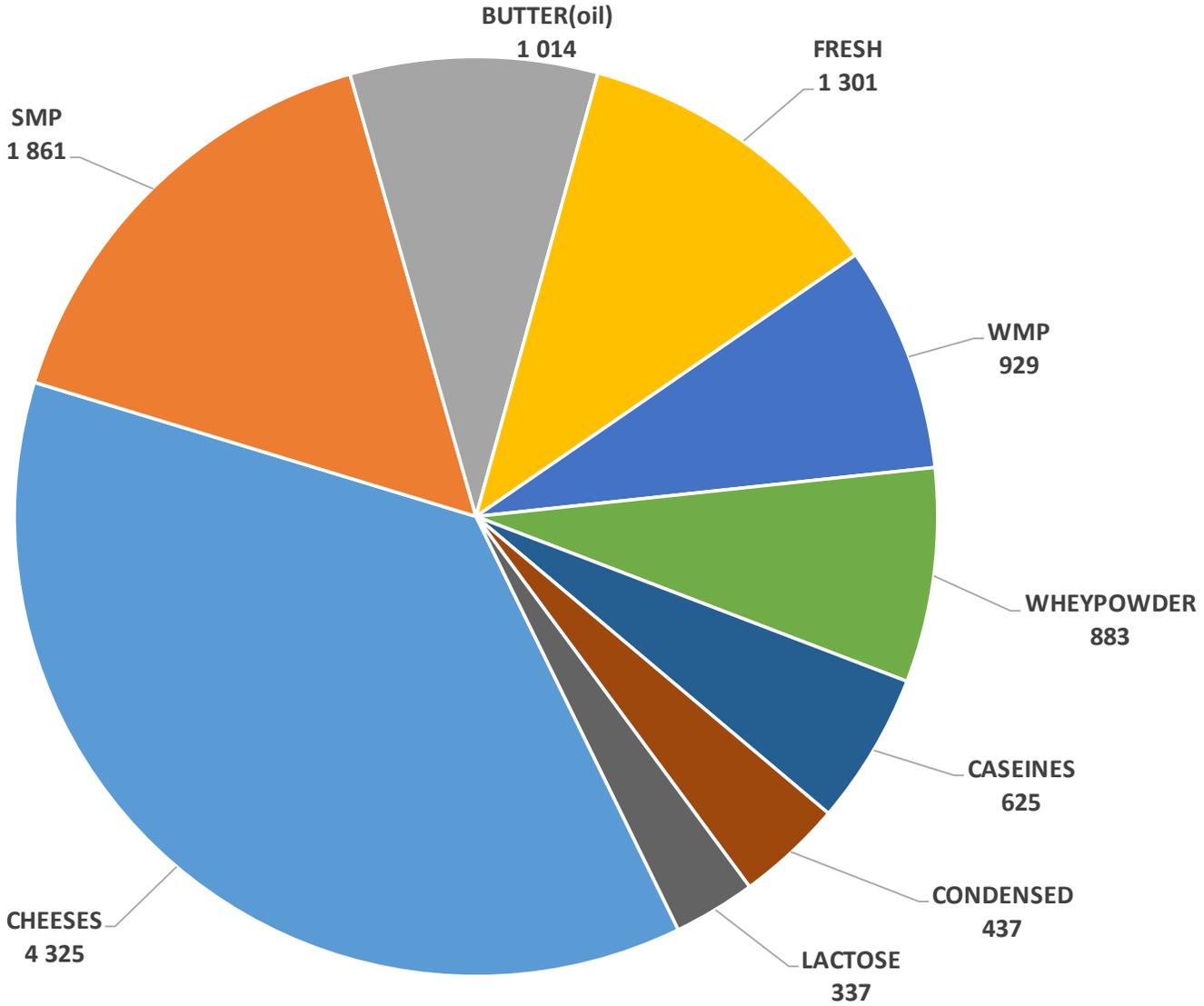
EU IMPORTS of main dairy products from U.K. up to October 2021

In Tons

	2019			2020			2021			% 2021/2020	
	U.K.	Extra-EU	%	U.K.	Extra-EU	%	U.K.	Extra-EU	%	U.K.	Extra-EU
BUTTER	36 544	42 967	85%	21 434	22 643	95%	21 222	24 587	86%	-1%	+9%
BUTTEROIL	17 194	23 208	74%	14 734	16 522	89%	11 636	16 267	72%	-21%	-2%
CHEESES	126 915	176 396	72%	127 704	176 277	72%	108 805	162 567	67%	-15%	-8%
SMP	42 145	47 474	89%	29 624	31 529	94%	19 385	26 316	74%	-35%	-17%
WMP	30 655	35 237	87%	22 985	23 728	97%	7 976	9 121	87%	-65%	-62%
WHEYPOWDER	39 998	59 112	68%	29 166	41 406	70%	23 922	33 544	71%	-18%	-19%
FRESH	649 090	662 698	98%	586 136	600 939	98%	509 052	526 152	97%	-13%	-12%
CONDENSED	37 192	38 194	97%	29 859	30 477	98%	29 877	30 499	98%	+0%	+0%
CASEINES	747	16 981	4%	1 331	15 893	8%	26	13 702	0%	-98%	-14%
LACTOSE	13 716	22 102	62%	16 138	20 657	78%	10 314	15 441	67%	-36%	-25%

Source : Comext

EU dairy exports Jan-Nov 2021 (x mio €)



2020	2021	Δ
10 949	11 710	+ 7%

MAIN IMPORTING THIRD COUNTRIES

Jan-Nov 2021 compared to 2020	BUTTER(OIL)		CHEESE		S.M.P.		W.M.P.	
	Qty in ktons	% 2021 /20						
China	116	↑ +21%	146	↑ +38%	375	↑ +34%	753	↑ +38%
United Kingdom up to Oct	44	↓ -23%	332	↓ -18%	12	↓ -28%	19	↔ -4%
Russia up to Oct	99	↔ -2%	265	↔ +5%	48	↔ -3%	24	↓ -13%
Japan	9	↓ -39%	241	↔ -1%	17	↓ -47%	2	↑ +11%
Indonesia up to Oct	14	↑ +19%	21	↑ +12%	150	↔ -0%	49	↑ +41%
United States	51	↓ -13%	154	↑ +17%	0	↓ -49%	10	↓ -50%

MAIN EXPORTING THIRD COUNTRIES

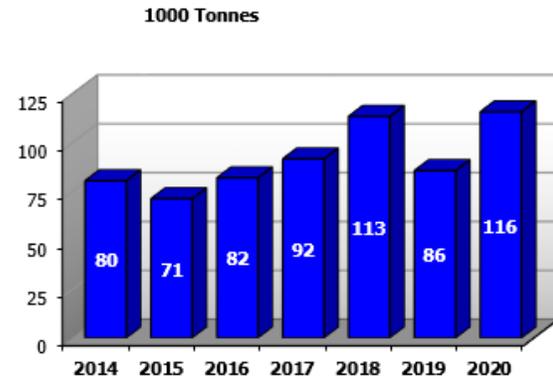
Jan-Nov 2021 compared to 2020	BUTTER(OIL)		CHEESE		S.M.P.		W.M.P.	
	Qty in ktons	% 2021 /20						
New Zealand	316	↔ -6%	296	↑ +17%	255	↔ -6%	1227	↔ +9%
EU*	180	↓ -15%	802	↔ +6%	673	↔ -2%	244	↓ -10%
United States	48	↑ +127%	342	↑ +11%	760	↔ +10%	33	↔ +5%
Belarus up to Oct	59	↑ +12%	218	↑ +11%	90	↔ -7%	30	↑ +45%
Australia	17	↑ +44%	128	↔ +3%	122	↑ +15%	43	↑ +55%
United Kingdom up to Oct	22	↓ -57%	85	↓ -46%	33	↓ -48%	24	↓ -48%

*: UK not included as destination

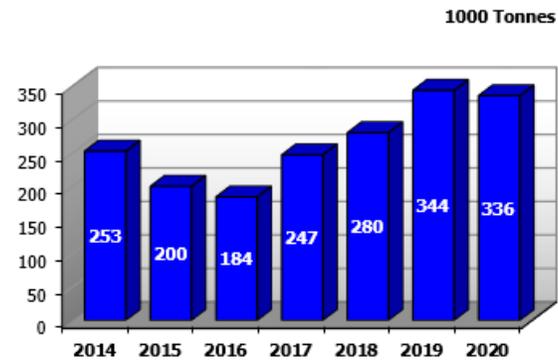
Source : IHS Markit/GTA

Dairy imports into China

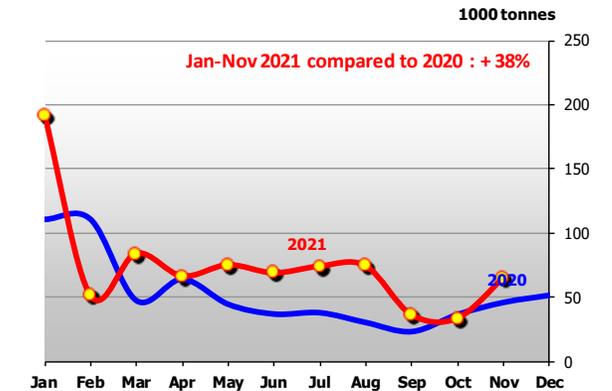
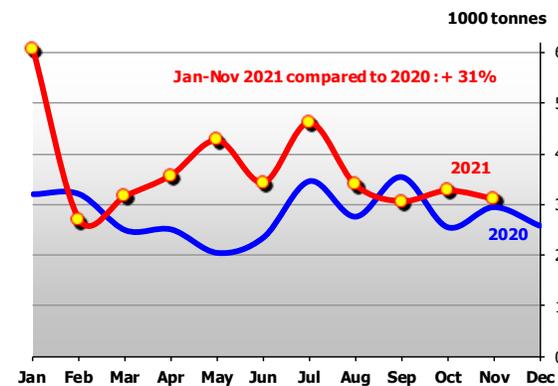
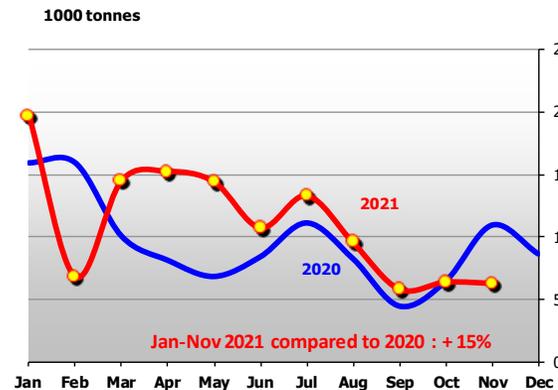
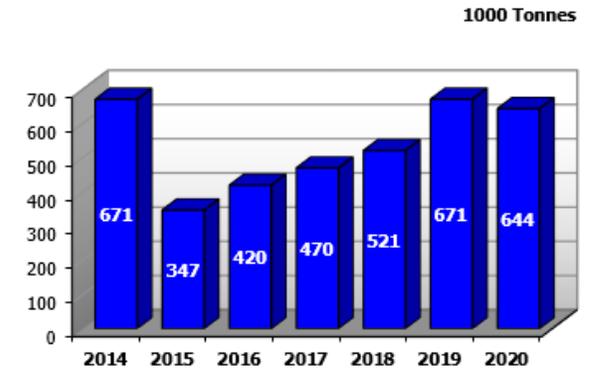
Butter + butteroil



SMP



WMP



Keep in touch and thank you!



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