



Short-term EU dairy market outlook

Unit of Analysis and Outlook
3 October, Civil Dialogue Group - MILK

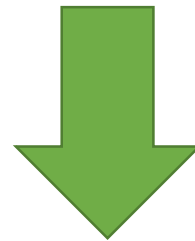
FEED PROSPECTS

PASTURES

- **Hot and dry weather** across Europe -> lower biomass formation; thus **lower grass availability and quality**
- **Negative impacts:** DE, FR (with few exemptions), Benelux, Southern Europe
- **Not-so negative:** PL, IE, DK

FEED CROPS

- **Availability of water for the irrigation was a challenge**, especially for feed crops (e.g. Spain and Italy)
- **Lower yields, lower availability**
- In some cases, **feed to be used in winter was already used** in summer -> potential shortages, and pressure on cost and supplies in winter months



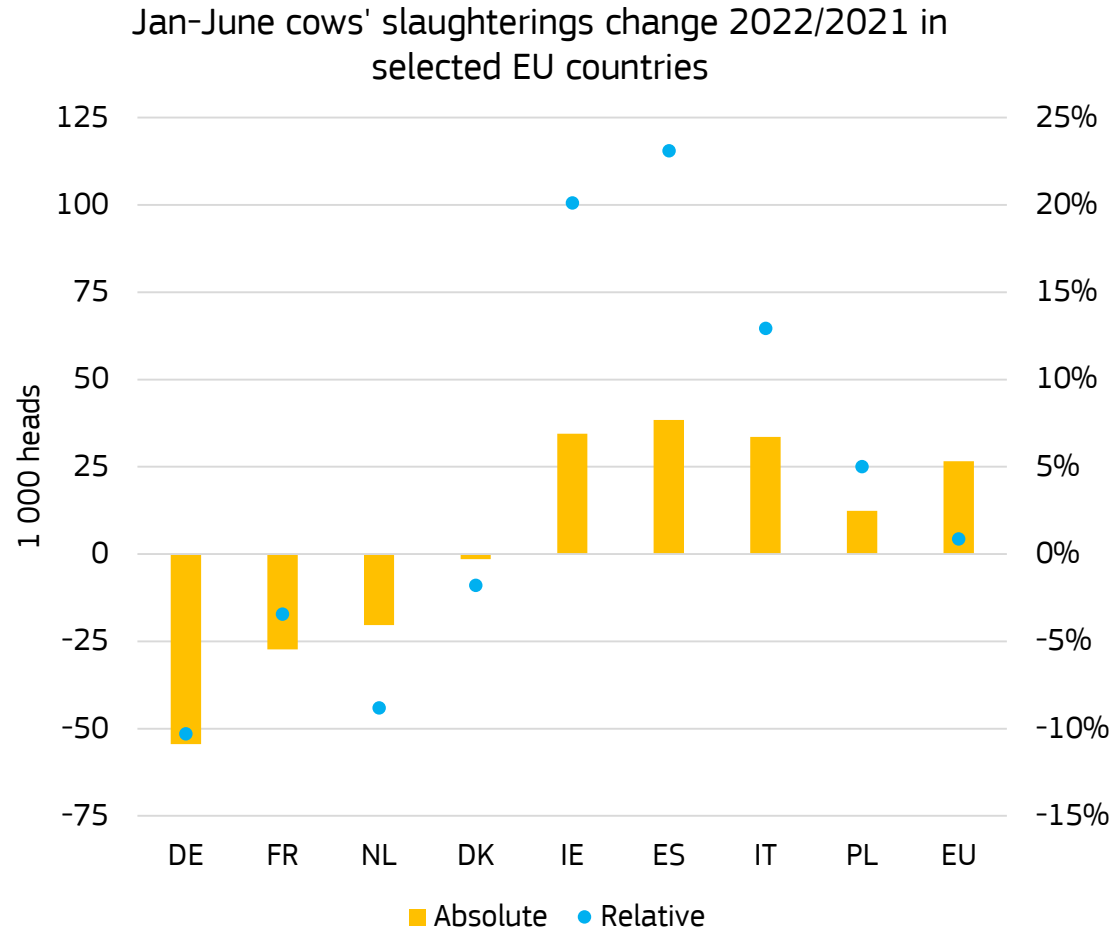
Negatively impacting yields, and availability of milk solids



European
Commission

COWS' SLAUGHTERINGS

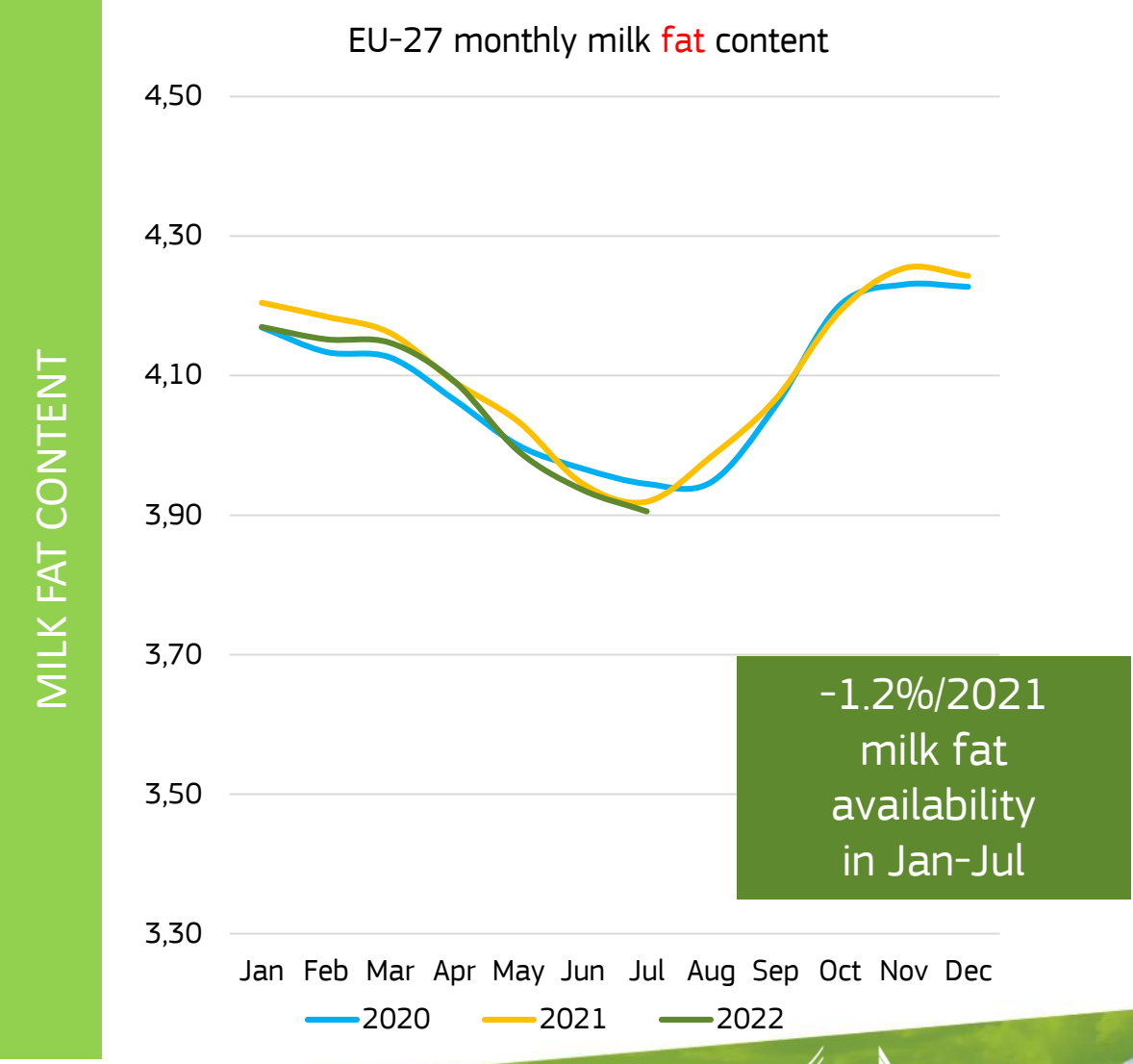
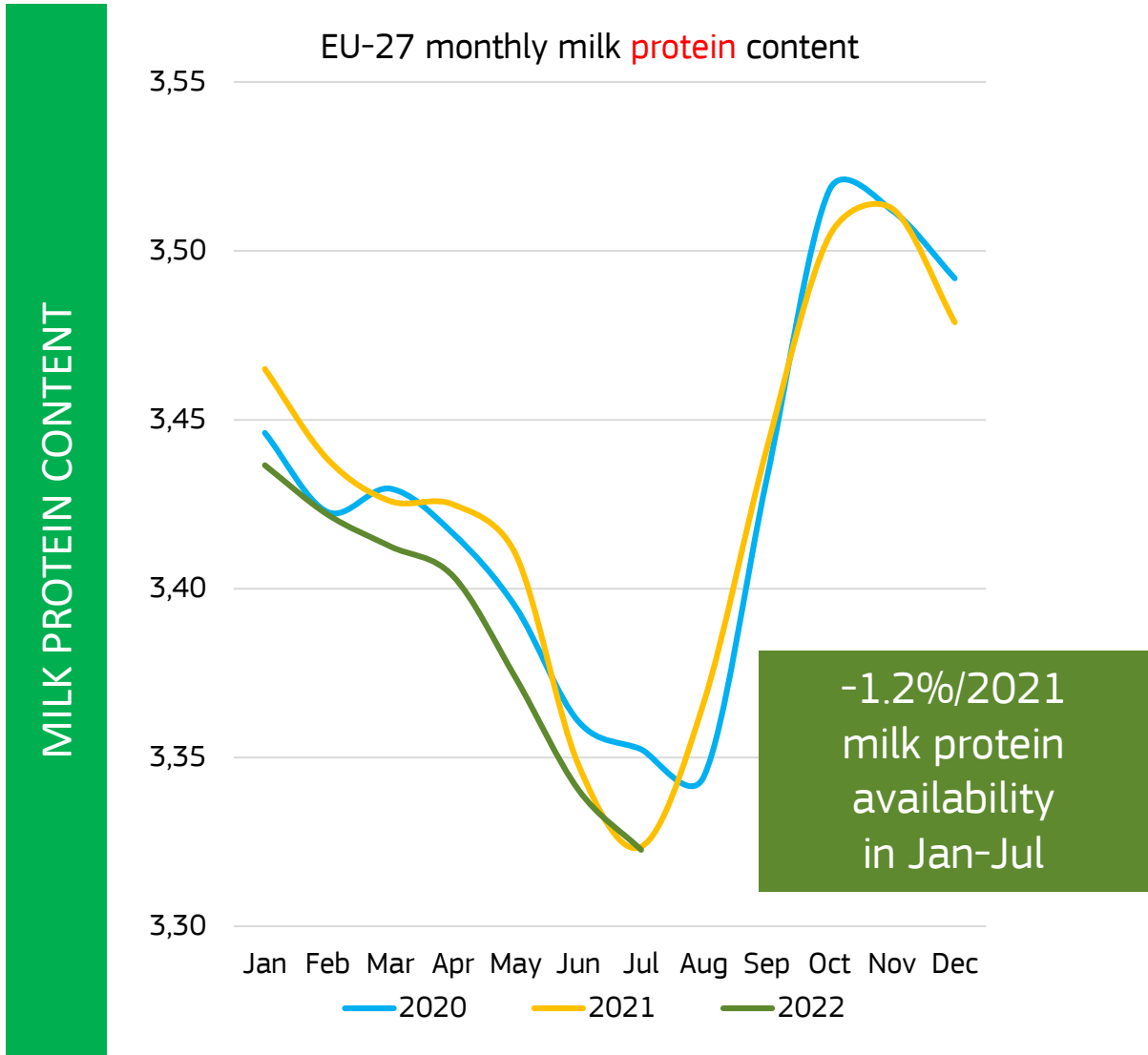
SLAUGHTERING IN SLAUGHTERHOUSES



Source: DG Agriculture and Rural Development, based on Eurostat

- **Slaughterings remain high** -> farmers are adjusting to availability and cost of feed
- Some farmers also opt for **shortening the lactation**
- Also **numbers of heifers lower**
- **Body heat stress** impacts negatively also insemination -> **lower fertility rates**
- 2022 EU dairy herd could drop by almost 1%

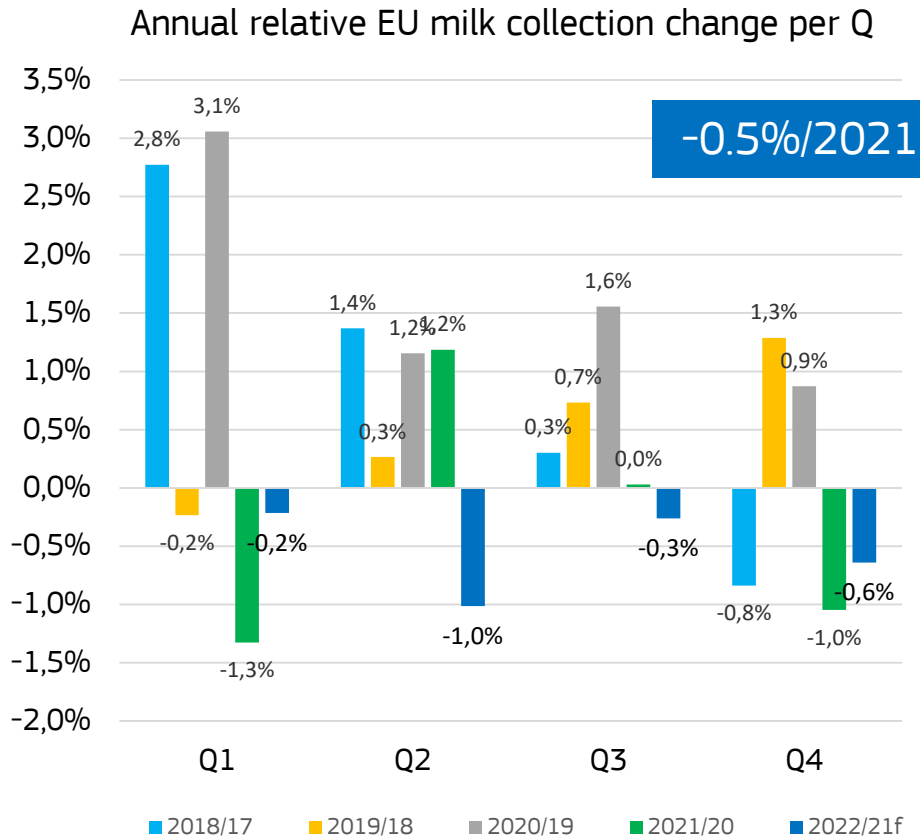
MILK SOLIDS AVAILABILITY



Source: DG Agriculture and Rural Development, based on Eurostat.

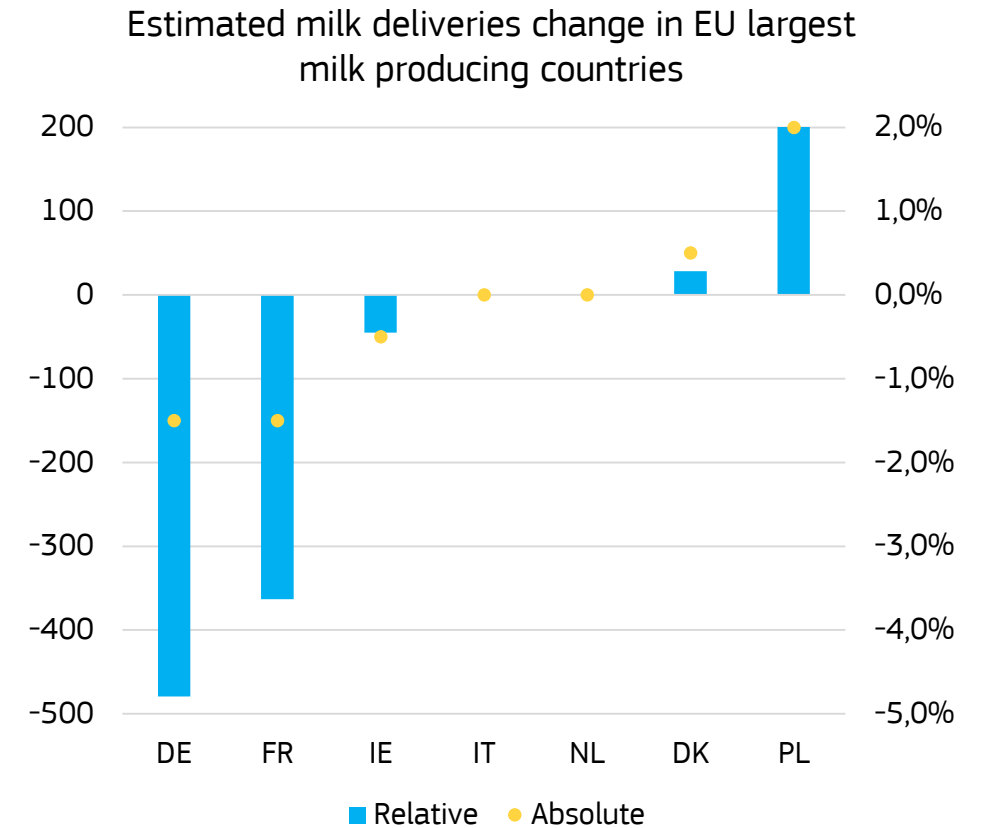
EU MILK SUPPLY OUTLOOK

2022 EU MILK DELIVERIES OUTLOOK



Source: DG Agriculture and Rural Development, based on Eurostat and MS notifications.

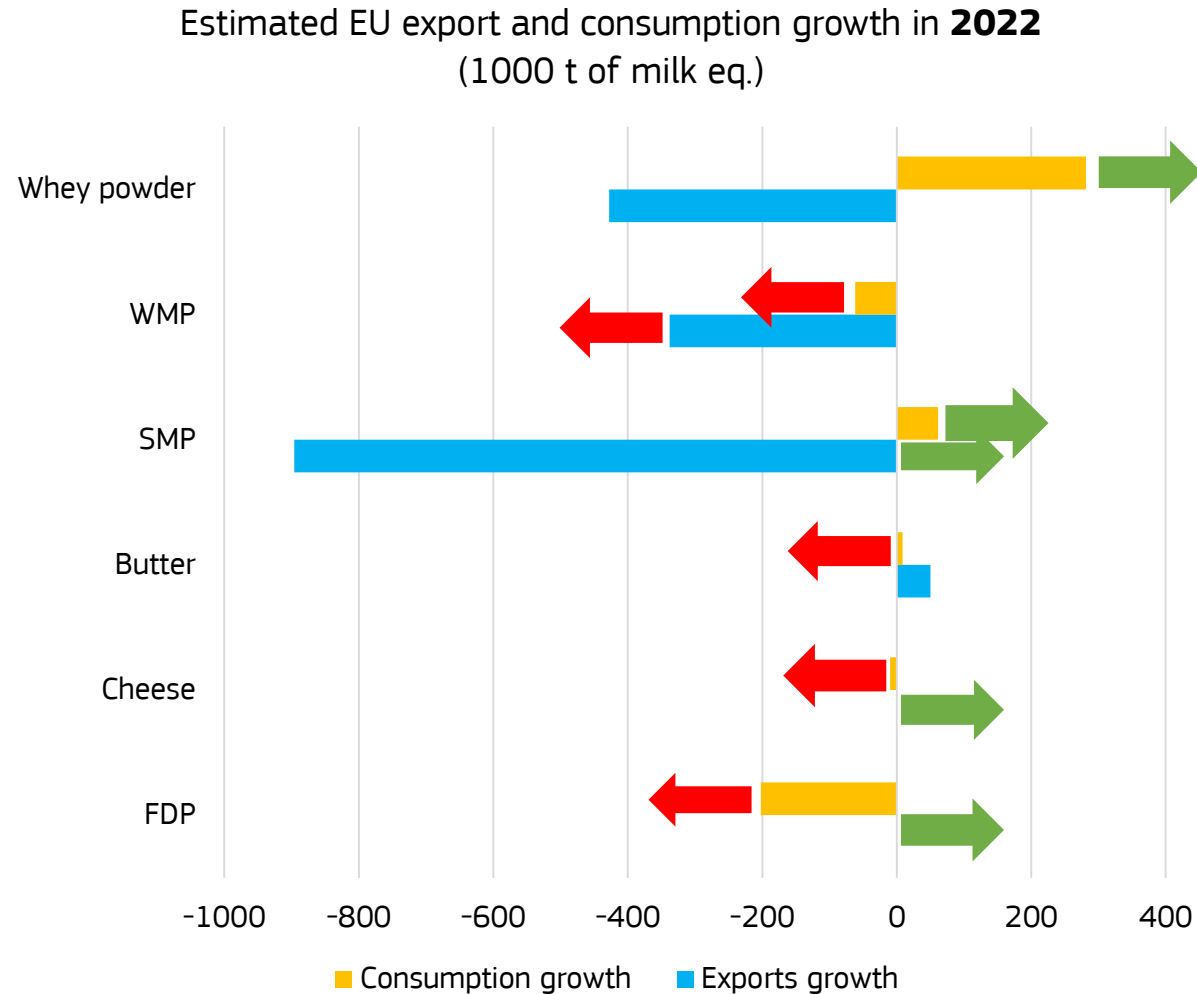
2022 MS MILK DELIVERIES OUTLOOK



Source: DG Agriculture and Rural Development, based on Eurostat and MS notifications.

EU DAIRY PRODUCTS - OUTLOOK

DOMESTIC USE AND EXPORTS



Arrows show only a forecast direction of change in 2023

Source: DG Agriculture and Rural Development, based on Eurostat.

THANK YOU FOR YOUR ATTENTION