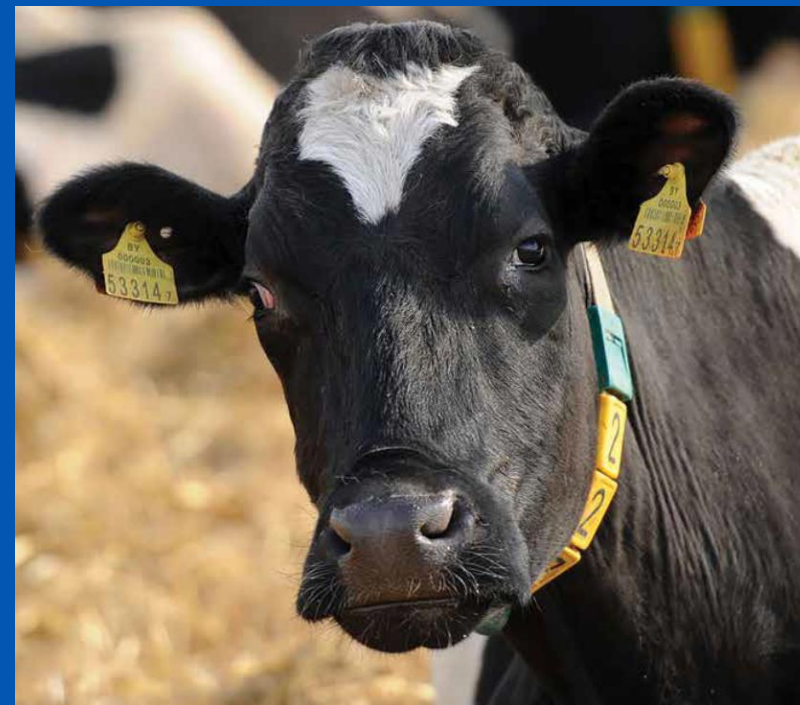


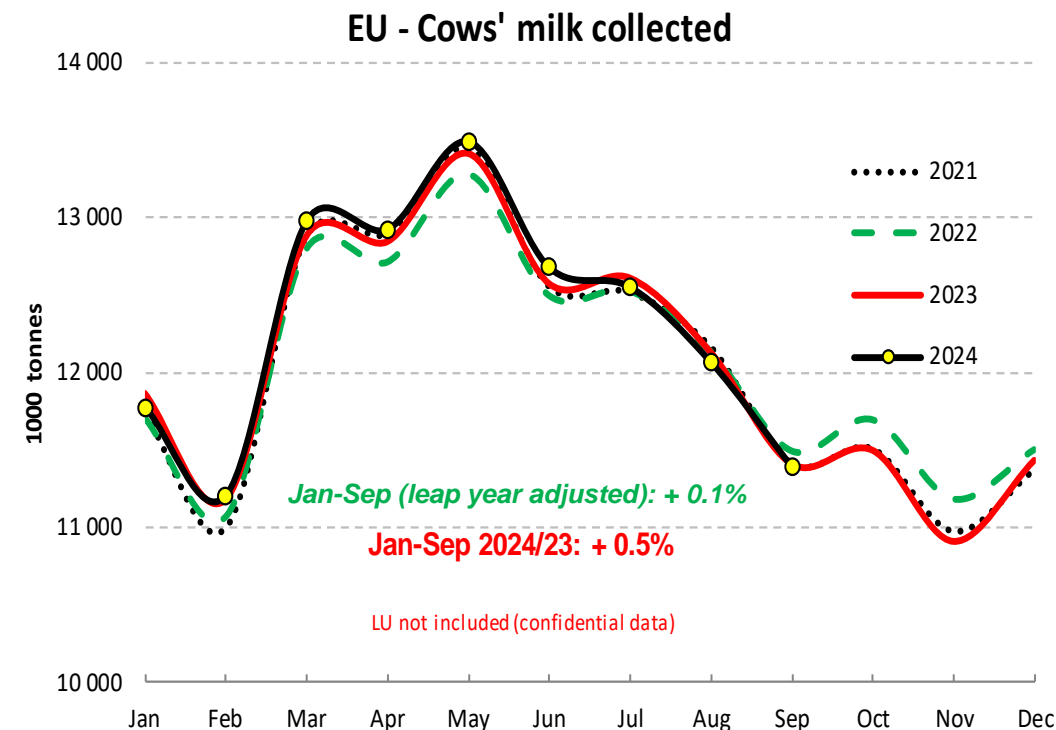
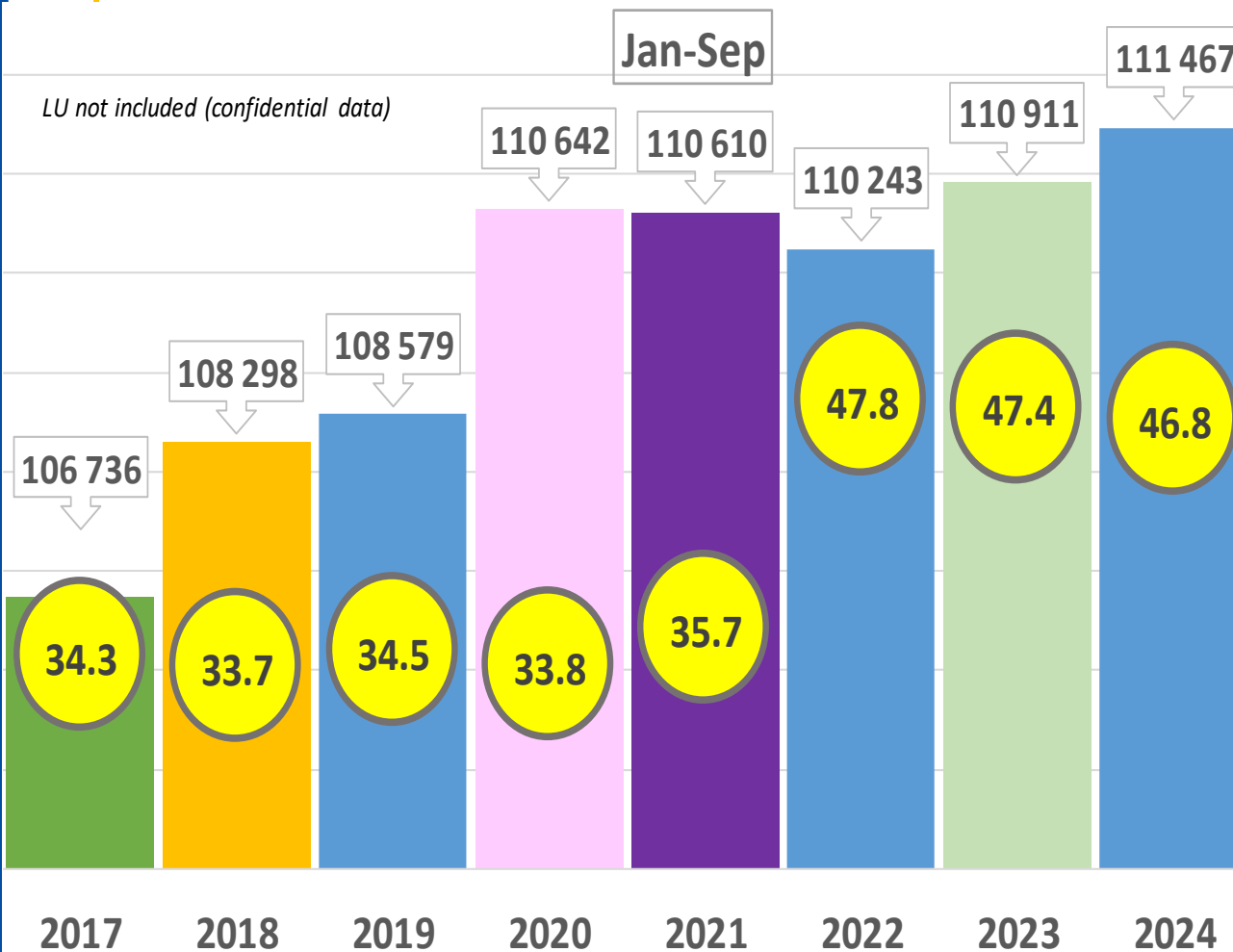
Civil Dialogue Group on Animal Production – focus on Milk, Beef & Veal and Pigmeat

Milk market overview



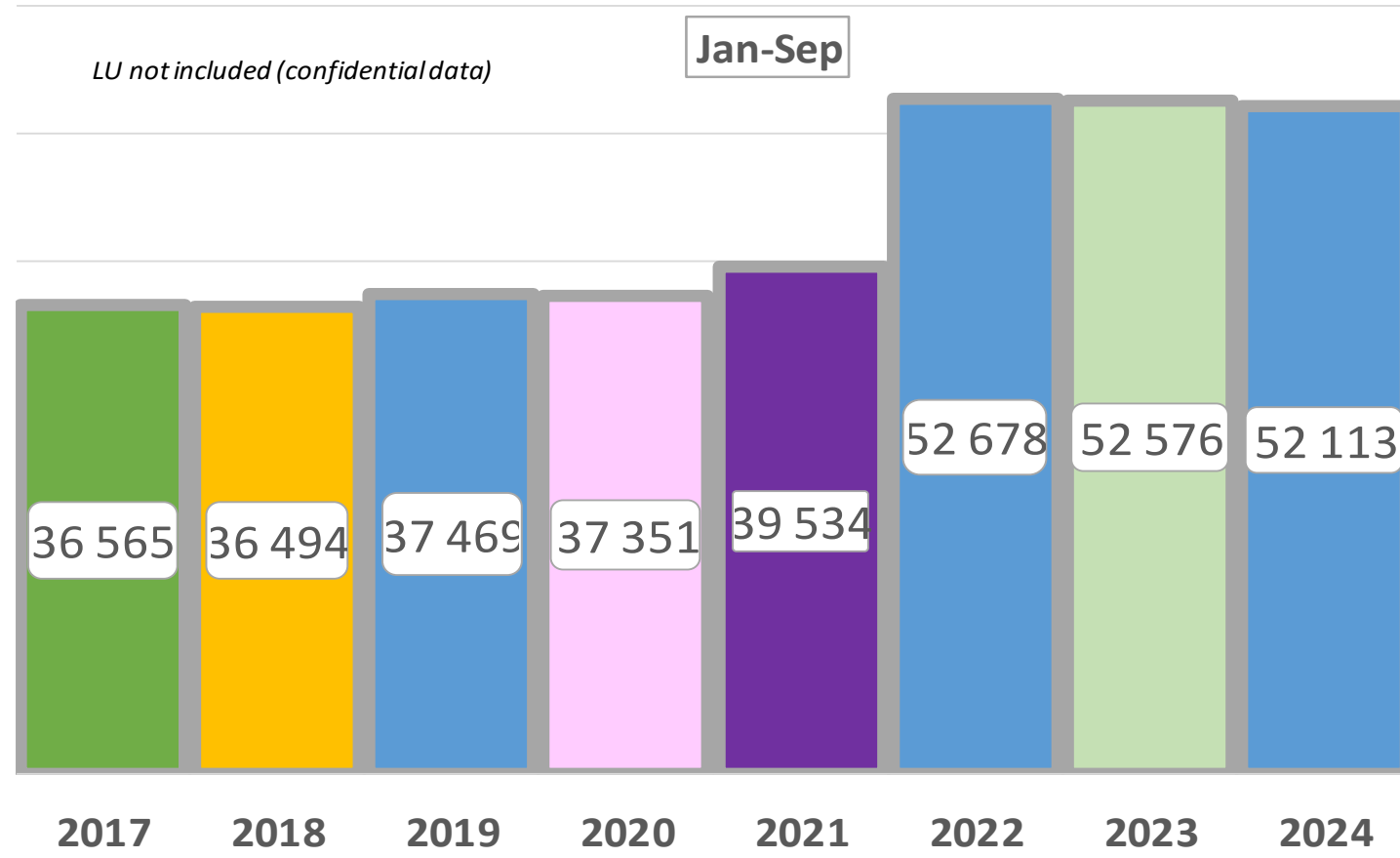
Brussels, 26 November 2024

EU-27 milk deliveries and price Jan-Sep 2017-24 (x1000 t, c/kg)



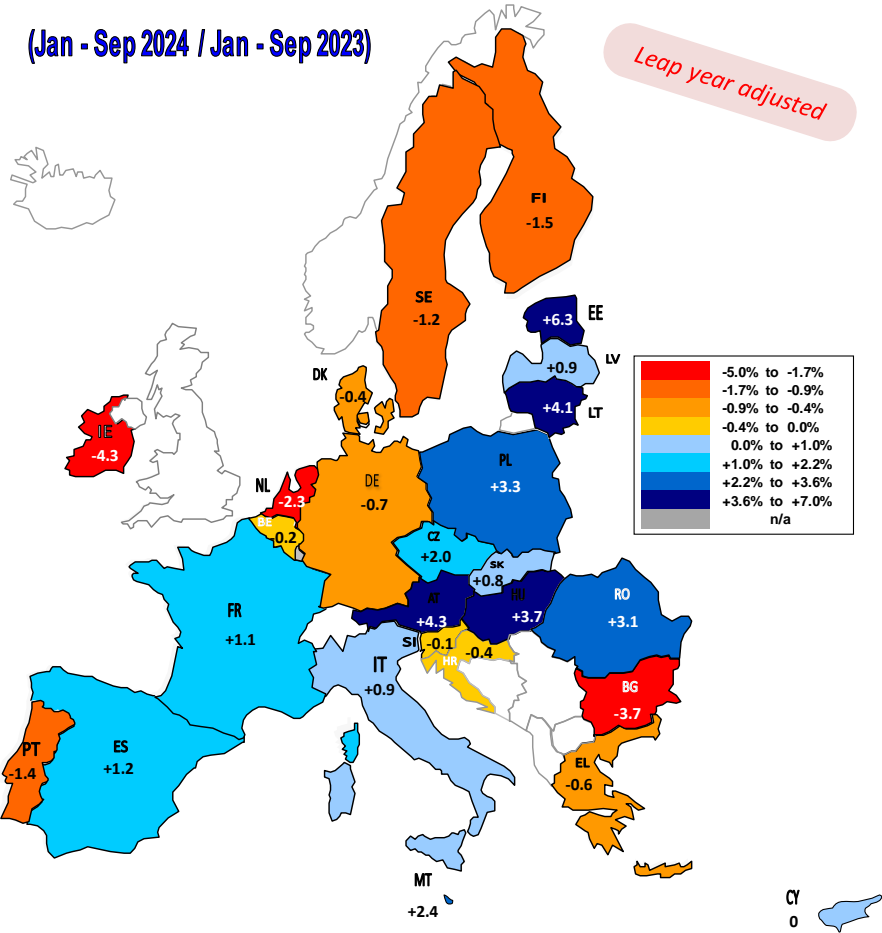
Source: Estat (Newcronos) - MS notifications - CLAL(IT)

EU-27 value milk production Jan-Sep 2017-24(x million €)



EU Milk Deliveries compared to last period (in %)

(Jan - Sep 2024 / Jan - Sep 2023)

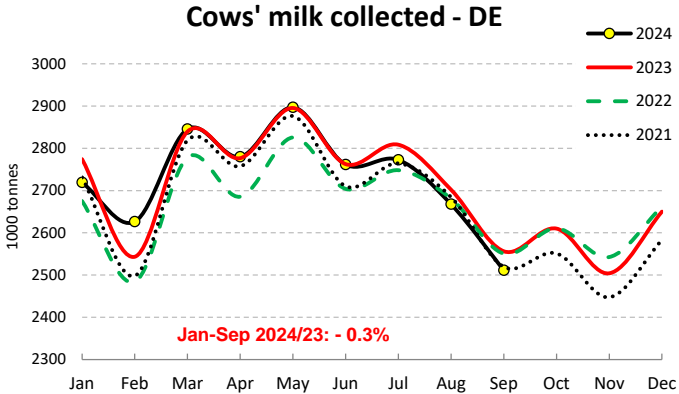


Source : MS' Communications to Eurostat, FEGA, AGEA, Reg.479/2010.1(a)1

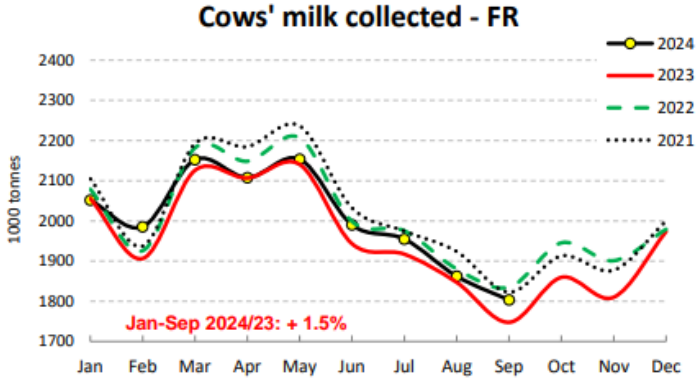
The designations employed and the presentation of material on the map do not imply the expression of any opinion whatsoever on the part of the European Union concerning the legal status of any country, territory or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Sep 24 compared to Sep 23				
Rank	evolution in %		evolution in 1000 Tons	
	MS	%	MS	Tons
1.	HU	+ 5.3%	FR	+ 56
2.	EE	+ 3.4%	AT	+ 7
3.	FR	+ 3.2%	HU	+ 7
4.	AT	+ 3.0%	IE	+ 6
5.	EL	+ 2.9%	EE	+ 2
6.	SI	+ 2.9%	ES	+ 2
7.	HR	+ 1.9%	RO	+ 2
8.	RO	+ 1.8%	EL	+ 1
9.	IE	+ 0.8%	SI	+ 1
10.	MT	+ 0.7%	CZ	+ 1
11.	ES	+ 0.3%	HR	+ 1
12.	CZ	+ 0.3%	MT	+ 0
13.	PL	+ 0.0%	PL	+ 0
14.	IT	- 0.1%	IT	- 1
15.	DK	- 1.2%	SK	- 1
16.	BE	- 1.3%	CY	- 1
17.	SE	- 1.4%	BG	- 2
18.	SK	- 1.6%	LT	- 2
19.	DE	- 1.8%	LV	- 3
20.	LT	- 1.9%	SE	- 3
21.	PT	- 2.2%	PT	- 3
22.	FI	- 2.4%	FI	- 4
23.	NL	- 2.6%	BE	- 5
24.	BG	- 3.4%	DK	- 5
25.	LV	- 3.7%	NL	- 29
26.	CY	- 4.7%	DE	- 45
EU		- 0.2%	EU	- 19

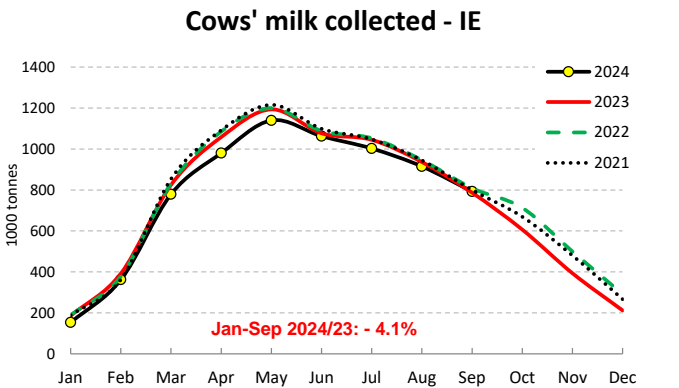
rem: LU not included (confidential data)



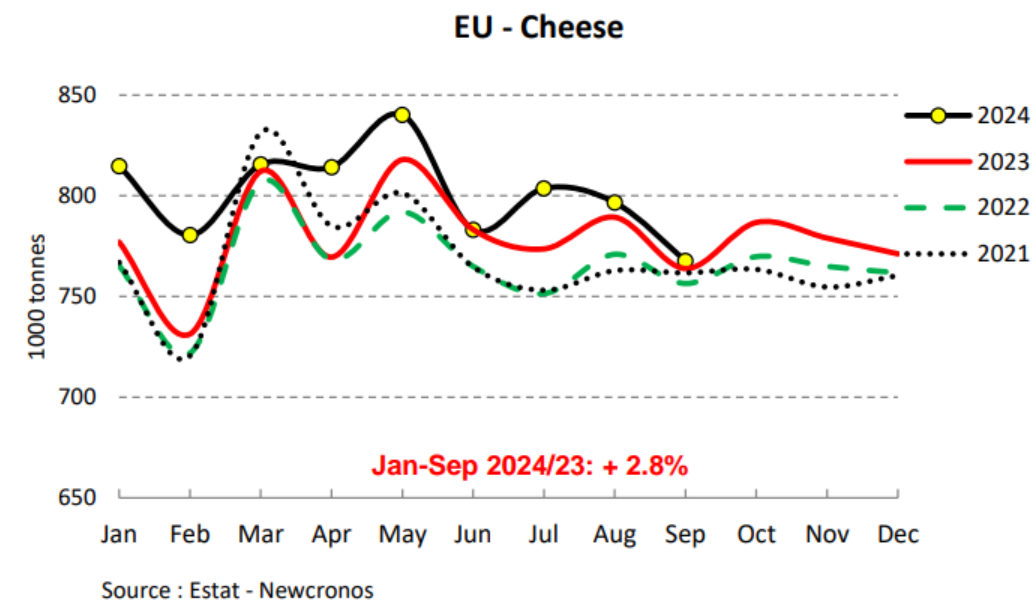
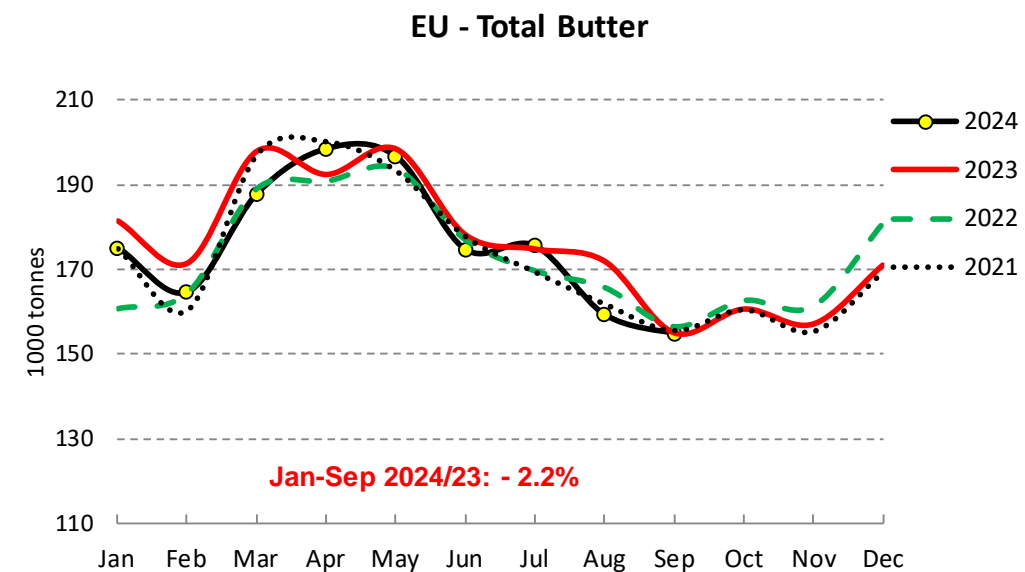
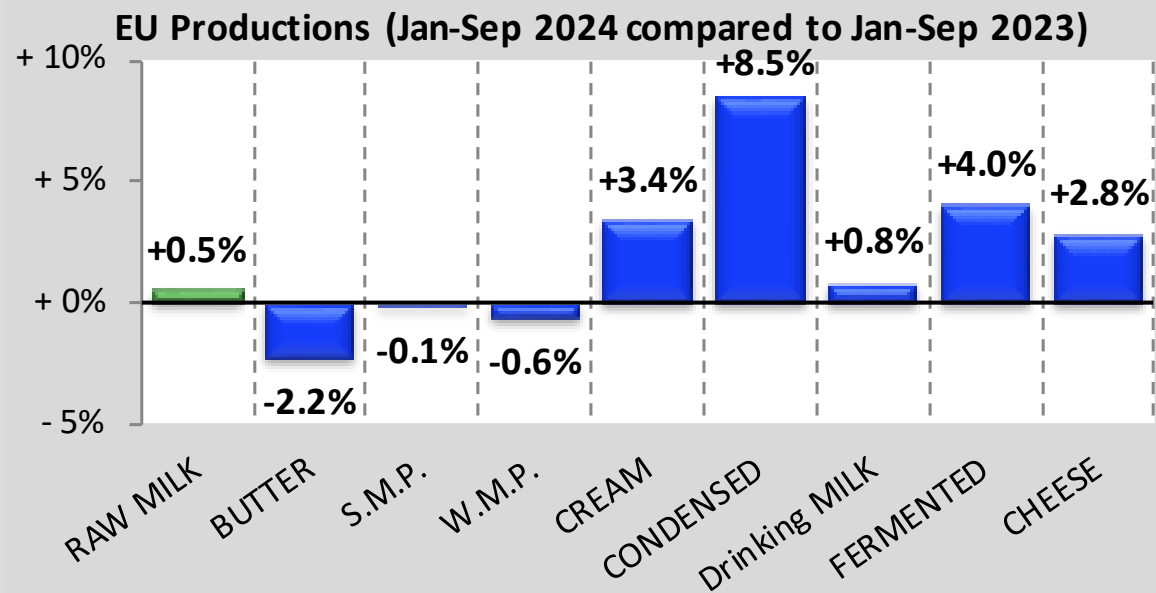
Source : Estat, Newcronos

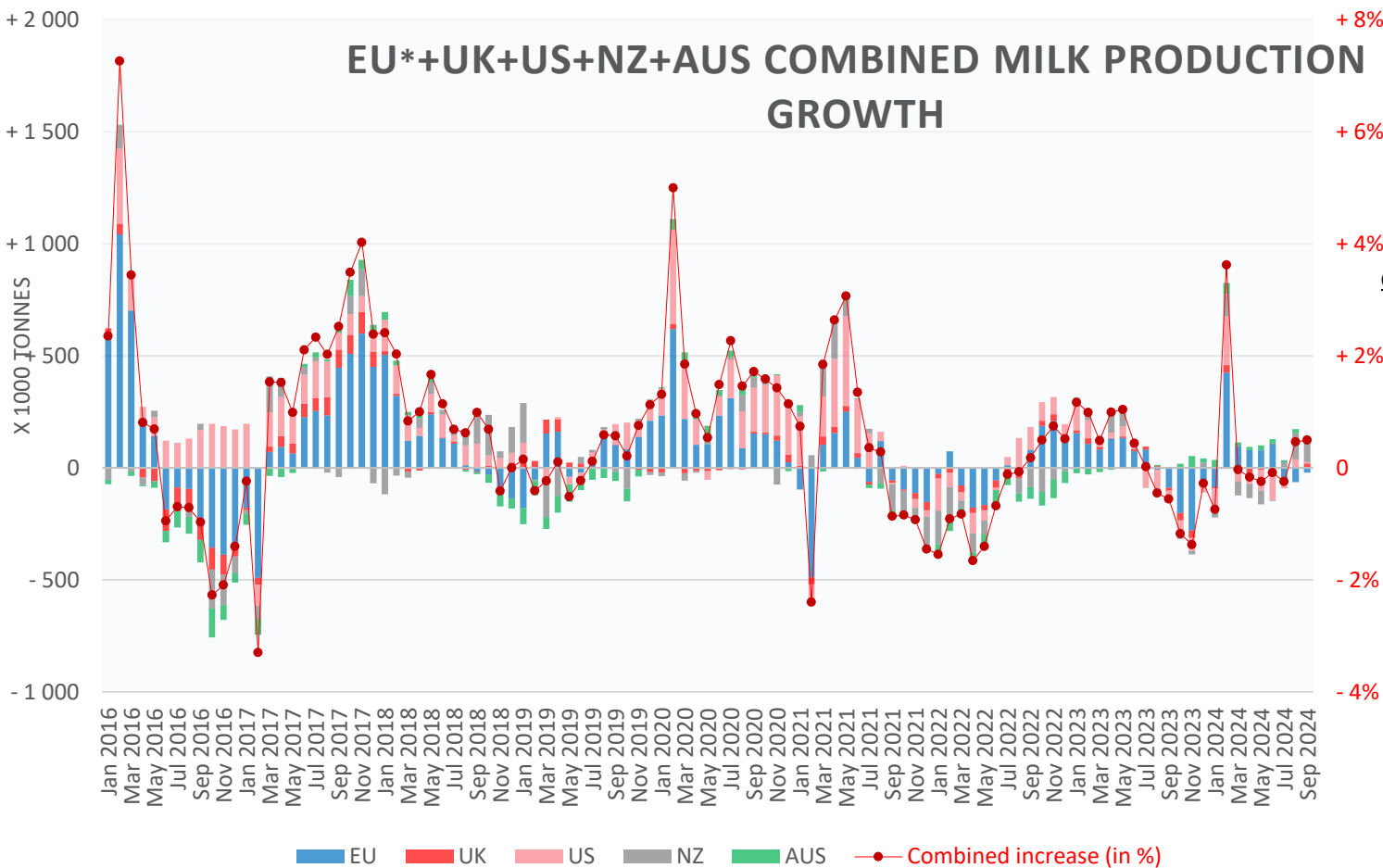


Source : Estat, Newcronos



Source : Estat, Newcronos



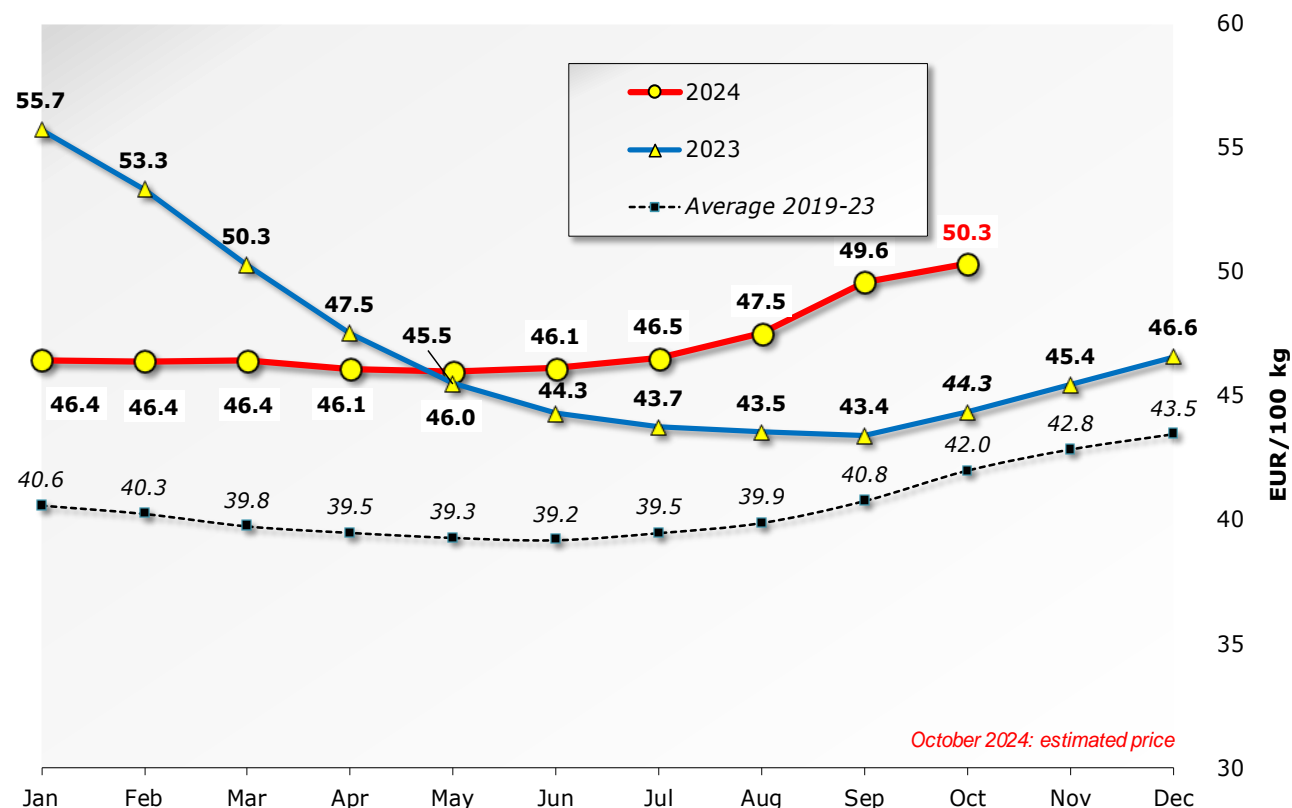


Combined world milk production

- Sep 2024 **24.3** mio t **+ 0.5%**
- Jan-Sep 2024 **219.3** mio t **+ 0.3%**

- Variations		Sep 2024		In 2024		
AUS	👉	+ 1.4%	Sep 2024	AUS	👆	+ 3.4% (Jan-Sep 2024)
NZ	👆	+ 4.1%	Sep 2024	NZ	👉	+ 1.0% (Jan-Sep 2024)
USA	👉	+ 0.1%	Sep 2024	USA	👇	- 0.3% (Jan-Sep 2024)
UK	👉	+ 1.8%	Sep 2024	UK	👉	+ 0.2% (Jan-Sep 2024)
EU	👇	- 0.2%	Sep 2024	EU	👉	+ 0.5% (Jan-Sep 2024)

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



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

EU Milk prices



AGRI estimate for NL

- Sep 2024

49.6 c/kg

+ 4.3% vs Aug 2024
+ 14.3% vs Sep 2023
+ 21.7% vs 5 years average

- Major variations vs 5 years average:

Top 5	
IE	+ 33.1%
PL	+ 29.6%
BG	+ 24.1%
HR	+ 23.7%
RO	+ 23.0%

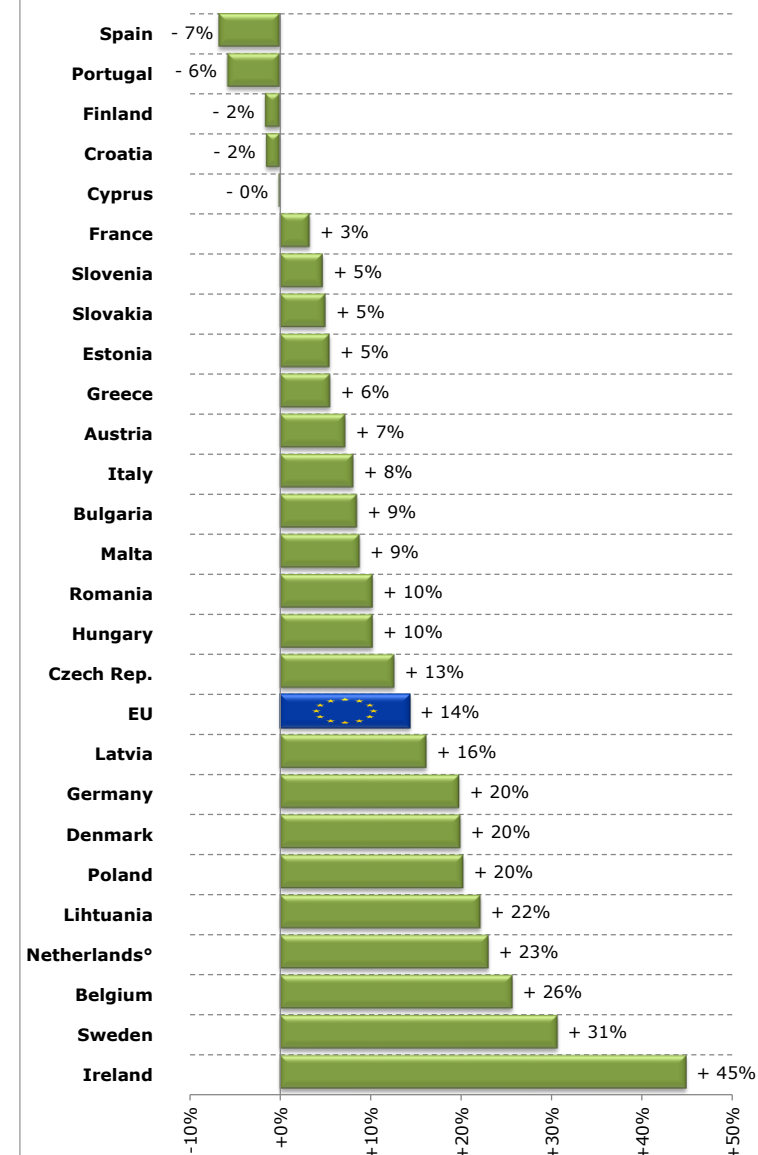
Bottom 5	
CY	+ 6.8%
MT	+ 9.5%
FI	+ 10.5%
LV	+ 15.9%
SK	+ 16.2%

Estimate for Oct 2024:

50.3 c/kg

+ 1.5% vs Sep 2024

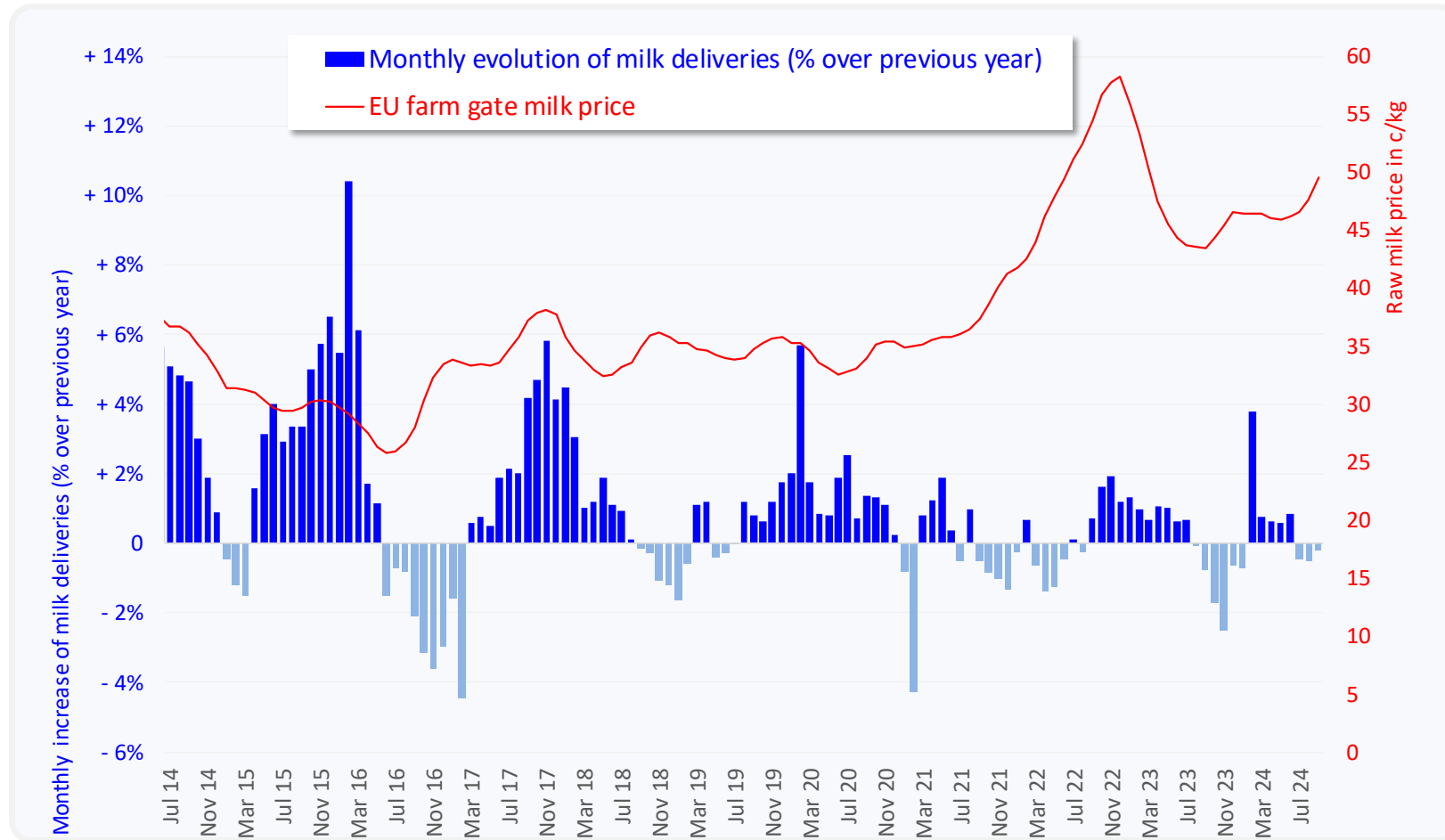
Raw Milk Price evolution in September 2024 compared to September 2023



° : estimated figures for Sep 2024

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

Development of milk production and prices

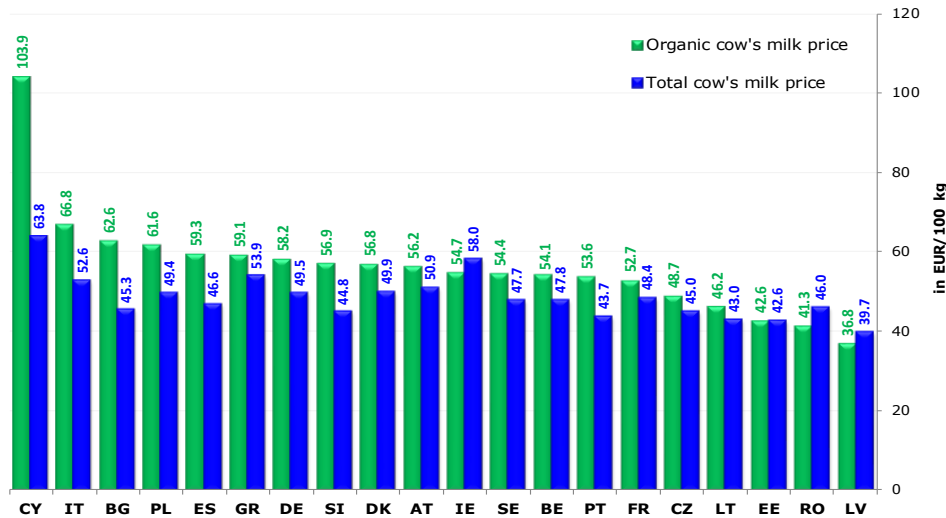


EU organic raw milk production & prices

EU Organic cow's milk prices

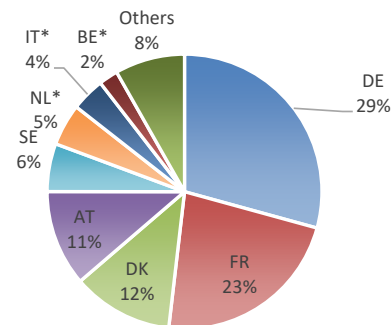
September 2024

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



Organic raw milk delivered to dairies -

Sep 2024

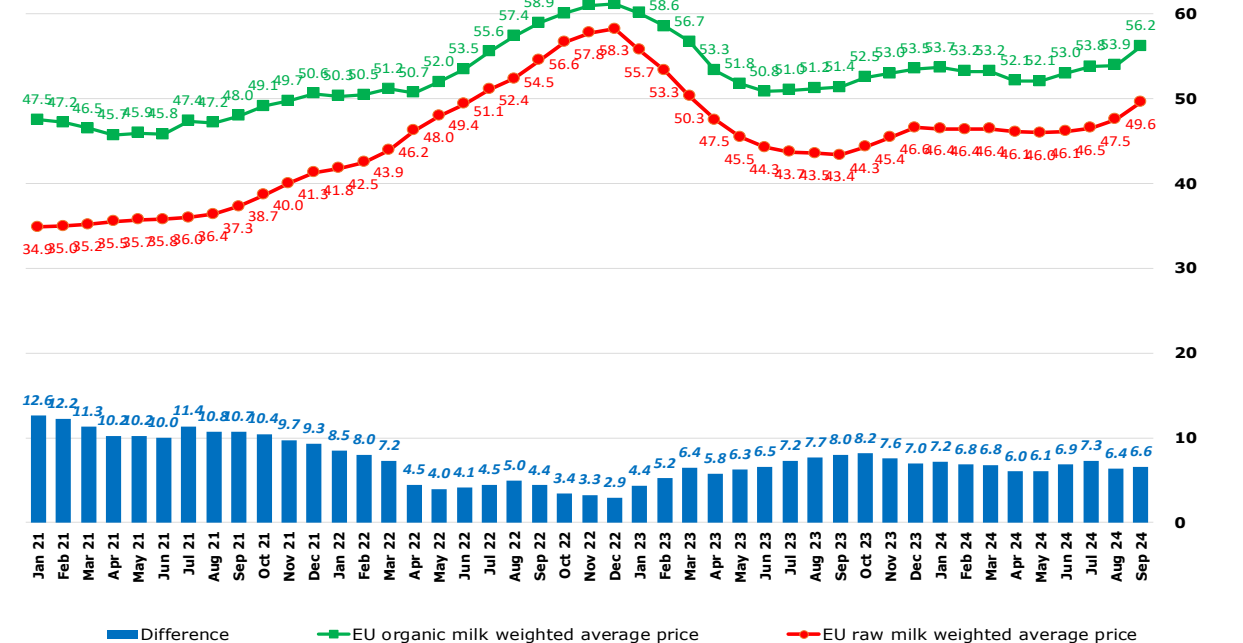


* Estimated Organic Raw Milk Production

EU raw milk and organic milk prices

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

EUR/100 kg



Sep 2024:

3.5 % of the total Raw Milk collected was organic

EU evolutive* dairy Quotations

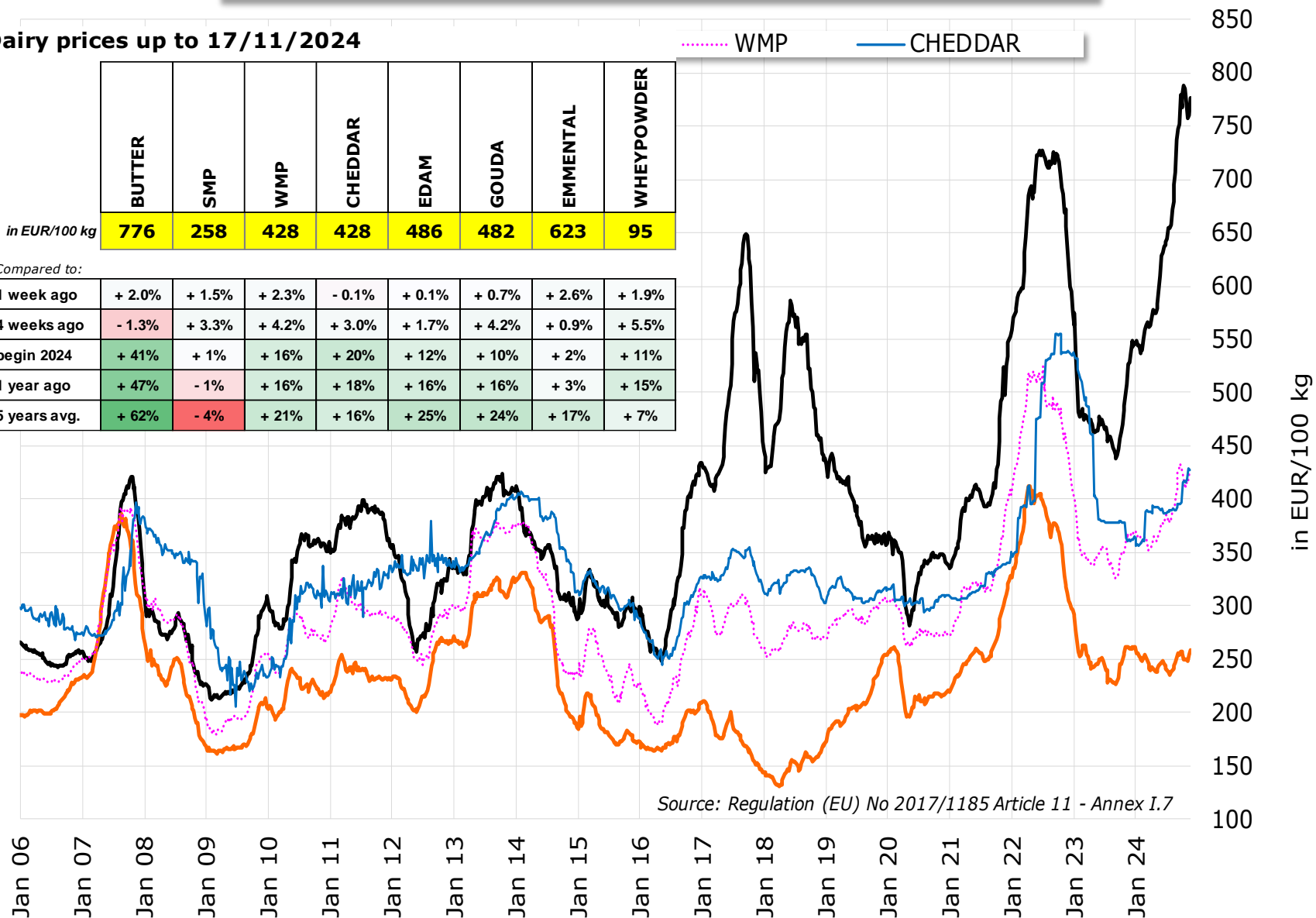
(EU Average Prices based on MS communication and weighted by production)

Dairy prices up to 17/11/2024

	BUTTER	SMP	WMP	CHEDDAR	EDAM	GOUDA	EMMENTAL	WHEYPOWDER
in EUR/100 kg	776	258	428	428	486	482	623	95

Compared to:

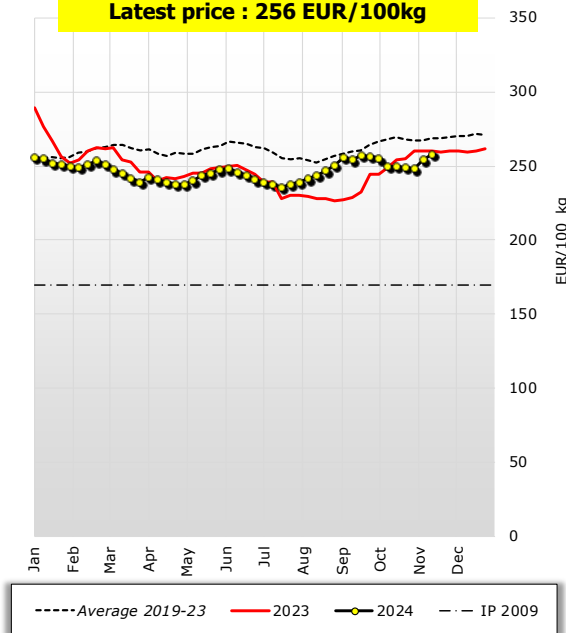
1 week ago	+ 2.0%	+ 1.5%	+ 2.3%	- 0.1%	+ 0.1%	+ 0.7%	+ 2.6%	+ 1.9%
4 weeks ago	- 1.3%	+ 3.3%	+ 4.2%	+ 3.0%	+ 1.7%	+ 4.2%	+ 0.9%	+ 5.5%
begin 2024	+ 41%	+ 1%	+ 16%	+ 20%	+ 12%	+ 10%	+ 2%	+ 11%
1 year ago	+ 47%	- 1%	+ 16%	+ 18%	+ 16%	+ 16%	+ 3%	+ 15%
5 years avg.	+ 62%	- 4%	+ 21%	+ 16%	+ 25%	+ 24%	+ 17%	+ 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)

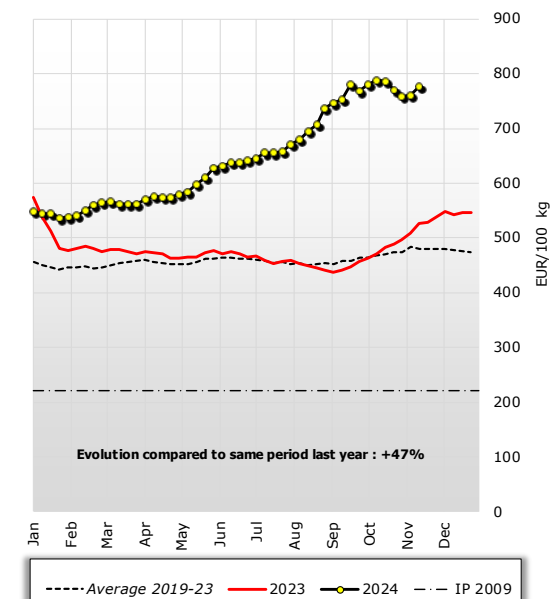
Weekly EU SMP Prices

Latest price : 256 EUR/100kg



Weekly EU BUTTER Prices

Latest price : 776 EUR/100kg



EU Exports of Dairy products - Main destinations

Source : COMEXT

Period : January-July

Quantity in Tonnes

EU EXPORTS of BUTTER - main destinations					
Period : January-July					
Qty Tons	2022	2023	2024		
USA	24 170	26 246	31 040	↑	+ 18%
United Kingdom	31 522	25 004	27 655	↑	+ 11%
China	7 945	9 409	10 412	↑	+ 11%
South Korea	6 836	7 043	7 418	↑	+ 5%
Saudi Arabia	5 744	9 230	6 514	↓	- 29%
U.A.Emirates	3 512	2 838	3 976	↑	+ 40%
Morocco	2 502	4 390	3 785	↓	- 14%
Indonesia	3 016	2 656	3 566	↑	+ 34%
Israel	2 031	4 224	3 080	↓	- 27%
Taiwan	3 664	3 444	2 764	↓	- 20%
Other	41 624	50 558	41 311	↓	- 18%
TOTAL	132 567	145 042	141 520	↔	- 2%

EU EXPORTS of CHEESES - main destinations					
Period : January-July					
Qty Tons	2022	2023	2024		
United Kingdom	247 166	254 661	248 911	↔	- 2%
USA	74 448	68 435	78 411	↑	+ 15%
Japan	66 436	59 645	48 189	↓	- 19%
Switzerland	41 705	41 651	44 114	↑	+ 6%
South Korea	31 435	35 603	32 440	↓	- 9%
Saudi Arabia	26 882	24 397	24 099	↔	- 1%
China	19 040	19 161	19 684	↔	+ 3%
Ukraine	19 878	18 699	19 482	↔	+ 4%
Australia	14 938	15 563	18 303	↑	+ 18%
Canada	13 938	12 341	14 724	↑	+ 19%
Other	224 426	245 920	254 418	↔	+ 3%
TOTAL	780 293	796 076	802 776	↔	+ 1%

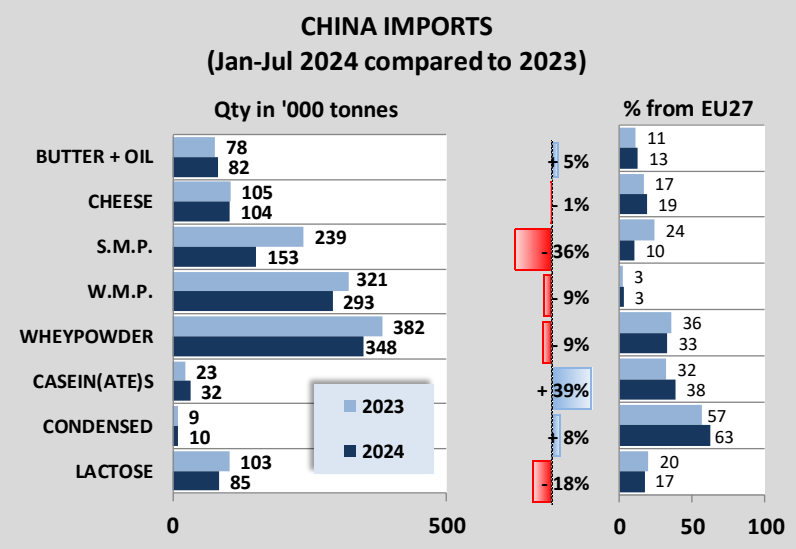
EU EXPORTS of SMP - main destinations					
Period : January-July					
Qty Tons	2022	2023	2024		
Algeria	52 774	103 599	113 850	↑	+ 10%
Egypt	27 190	30 301	32 718	↑	+ 8%
Philippines	20 321	14 734	26 464	↑	+ 80%
Saudi Arabia	14 831	25 240	24 989	↔	- 1%
Indonesia	32 635	15 651	19 537	↑	+ 25%
China	50 859	54 139	19 131	↓	- 65%
Morocco	10 996	16 498	18 307	↑	+ 11%
Yemen	15 968	18 026	16 072	↓	- 11%
Nigeria	20 141	11 209	16 045	↑	+ 43%
Vietnam	10 999	16 653	15 019	↓	- 10%
Other	142 983	185 011	151 307	↓	- 18%
TOTAL	399 697	491 059	453 438	↓	- 8%

EU EXPORTS of WMP - main destinations					
Period : January-July					
Qty Tons	2022	2023	2024		
Oman	35 012	29 711	30 723	↔	+ 3%
United Kingdom	9 461	11 121	9 411	↓	- 15%
China	12 809	8 458	8 636	↔	+ 2%
Kuwait	6 390	5 203	8 434	↑	+ 62%
Saudi Arabia	3 989	3 921	4 791	↑	+ 22%
Dominican R.	4 234	7 178	4 543	↓	- 37%
Algeria	2 805	20 186	4 089	↓	- 80%
Senegal	4 309	3 998	3 470	↓	- 13%
Nigeria	2 257	10 794	3 151	↓	- 71%
Lebanon	2 321	2 409	3 045	↑	+ 26%
Other	62 291	64 581	53 121	↓	- 18%
TOTAL	145 877	167 562	133 415	↓	- 20%

EU Exports

- Jan-Jul 2024 - 4% in milk equivalent
- 1% in value

		% variation in tons	
		Jan-Jul 2024	Jul 2024
Condensed	↗	+ 1%	↑ + 28%
SMP	↓	- 8%	↘ - 1%
WMP	↓	- 20%	↓ - 21%
Butter	↓	- 2%	↑ + 12%
Butteroil	↓	- 17%	↓ - 18%
Cheeses	↗	+ 1%	↑ + 9%
Wheypowder	↑	+ 9%	↑ + 25%



EU Imports of Dairy products - Main origins

Source : COMEXT

Period : January-July

Quantity in Tonnes

EU IMPORTS of BUTTER - main origins					
Period : January-July					
Qty Tons	2022	2023	2024		
United Kingdom	18 023	17 728	5 577	↓	- 69%
Ukraine	1 424	128	491	↑	+++
New Zealand	298	5 504	227	↓	- 96%
Norway	48	241	112	↓	- 53%
Iceland	74		50		
Egypt			50		
Belarus	3	3	4	↑	+ 51%
Serbia		21	1	↓	- 95%
Turkey	1 452	3	1	↓	- 70%
Bosnia-Herz.		3	1	↓	- 73%
Other	316	30	0	↓	- 99%
Total	21 638	23 660	6 513	↓	- 72%

EU IMPORTS of CHEESES - main origins					
Period : January-July					
Qty Tons	2022	2023	2024		
United Kingdom	69 471	63 674	69 030	↑	+ 8%
Switzerland	30 269	28 844	32 203	↑	+ 12%
Serbia	1 324	1 309	1 518	↑	+ 16%
Ukraine	531	311	1 294		+++
Norway	578	1 244	1 042	↓	- 16%
Turkey	1 009	668	720	↑	+ 8%
Iceland	160	141	701		+++
Bosnia-Herz.	507	599	594	→	- 1%
USA	302	227	192	↓	- 15%
North Macedonia	102	109	141	↑	+ 29%
Other	396	336	299	↓	- 11%
Total	104 649	97 464	107 733	↑	+ 11%

Keep in touch and thank you!



ec.europa.eu/agriculture



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