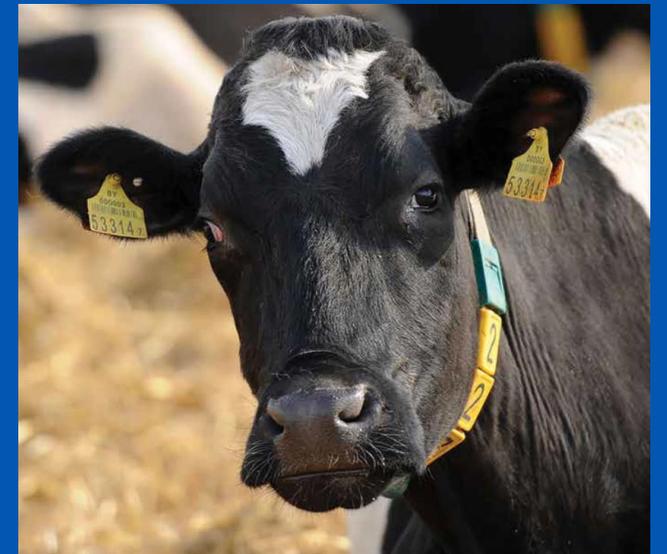


Civil Dialogue Group Animal Production

Milk market situation



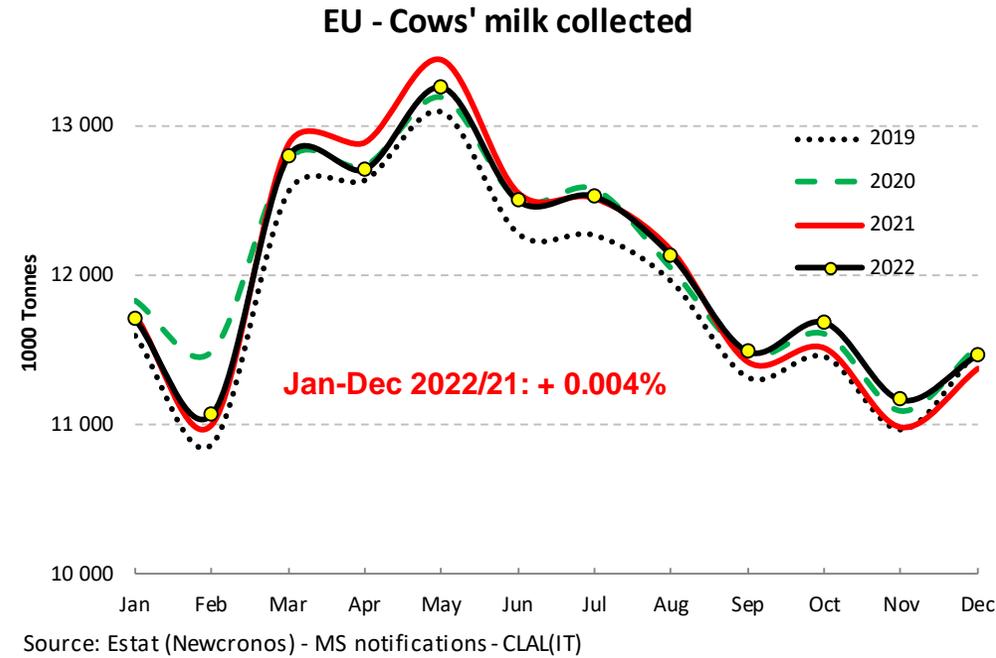
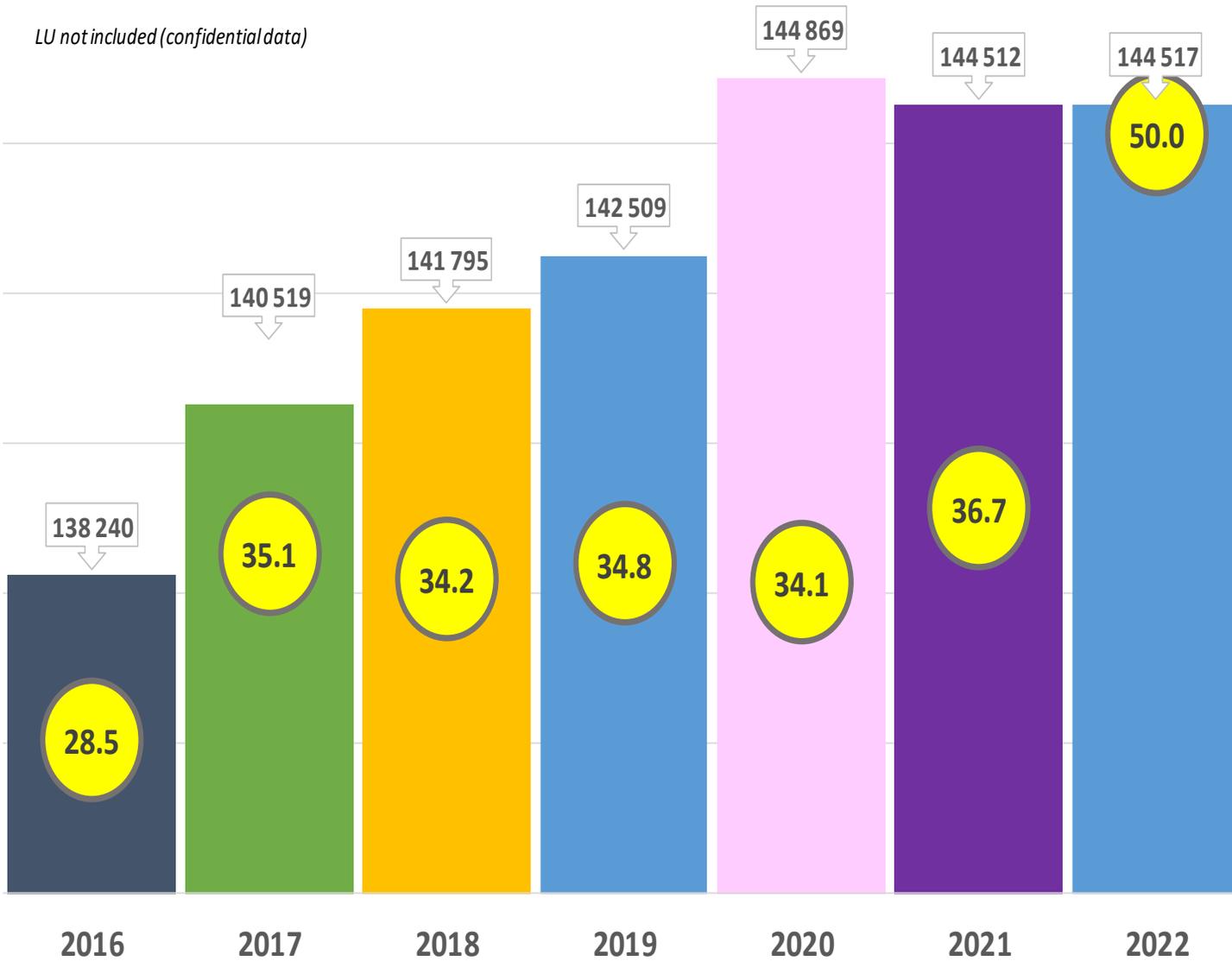
Brussels, 2 March 2023

Outline

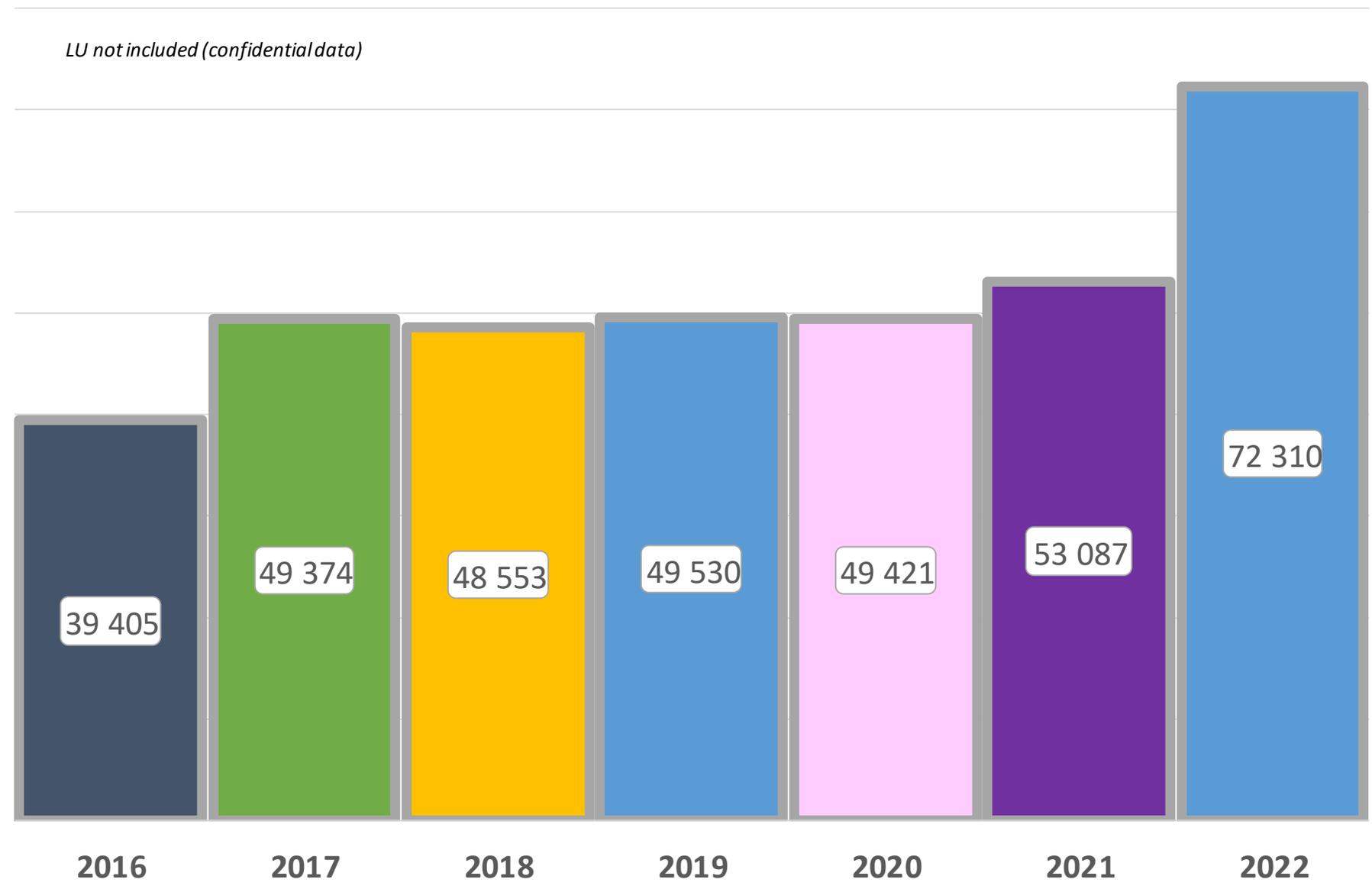
- ❑ EU-27 milk deliveries and prices
- ❑ Milk production of main exporting countries
- ❑ EU dairy productions
- ❑ EU milk prices
- ❑ Margins, input costs
- ❑ Organic milk prices and production
- ❑ EU and world quotations
- ❑ Dairy trade

EU-27 milk deliveries and price Jan-Dec 2016-22 (x1000 t, c/kg)

LU not included (confidential data)

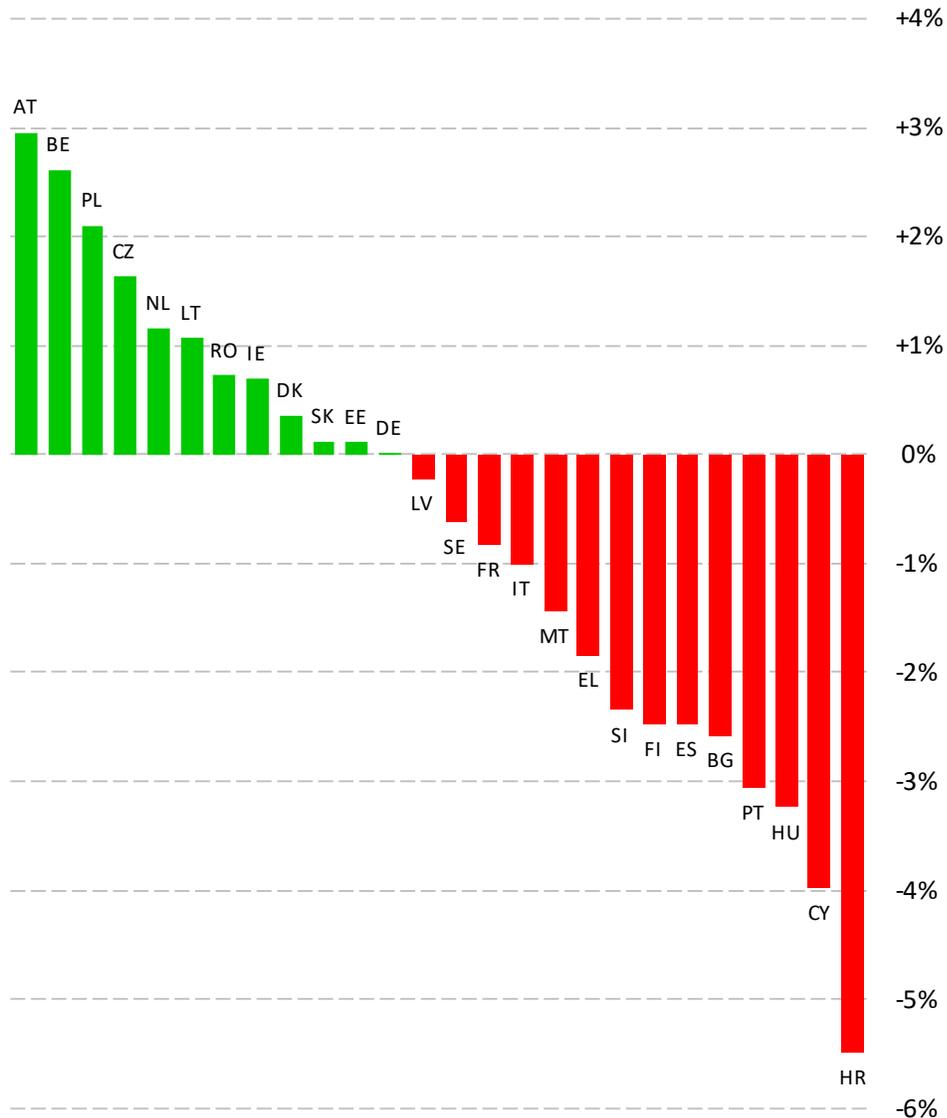


EU-27 value milk production Jan-Dec 2016-22 (x million €)



Cows' milk collected

2022/21 Jan-Dec (y/y % chg)

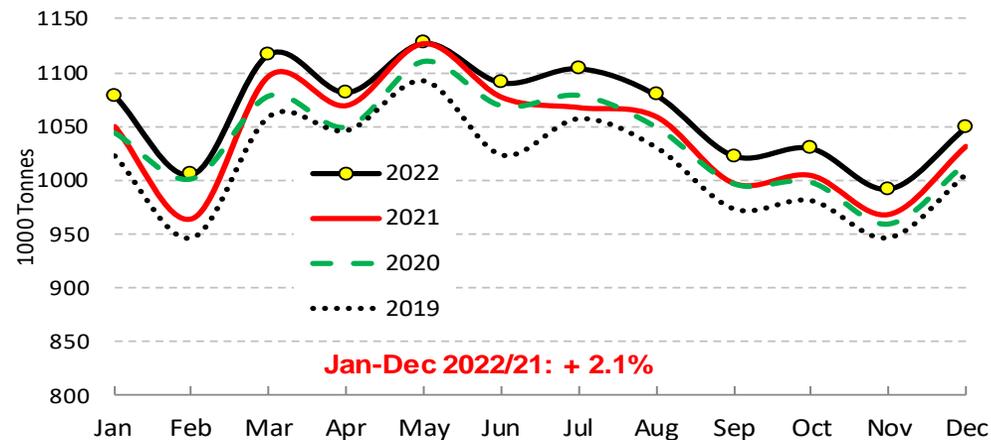


Source: Estat (Newcronos) - MS notifications

Top 10 milk collection per MS (Jan-Dec 2022)

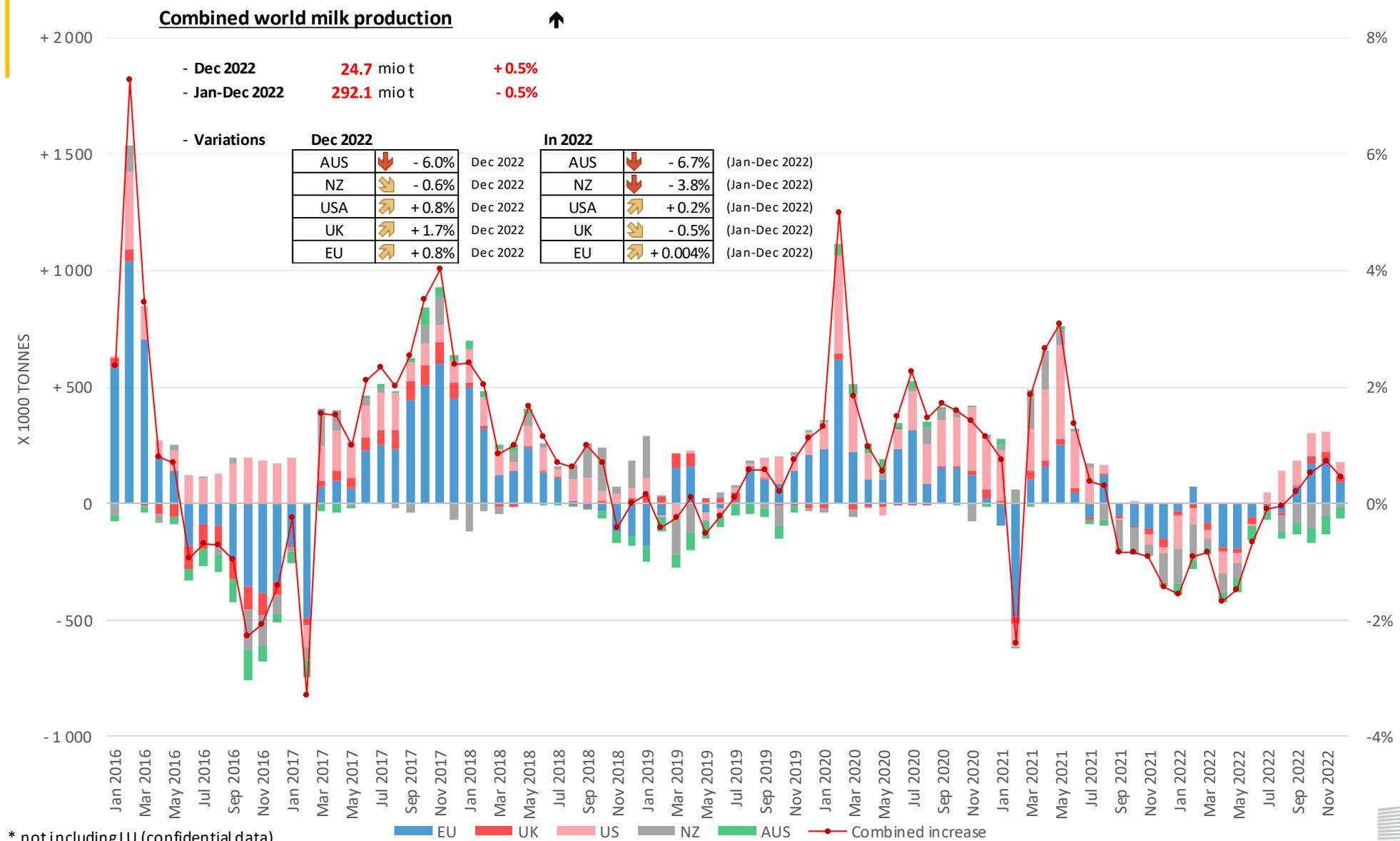


Cows' milk collected - PL

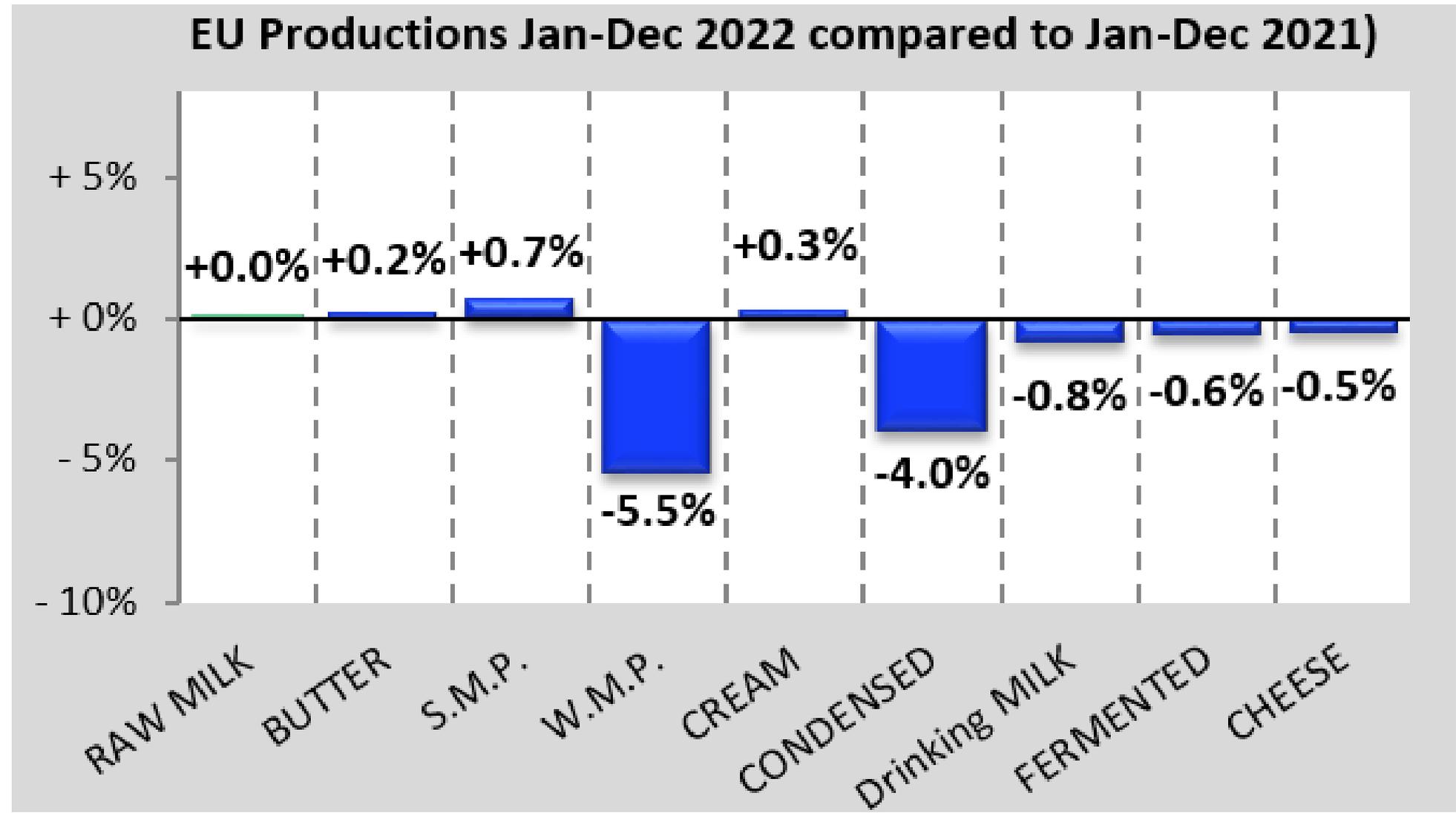


Source : Estat, Newcronos , AGEA

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



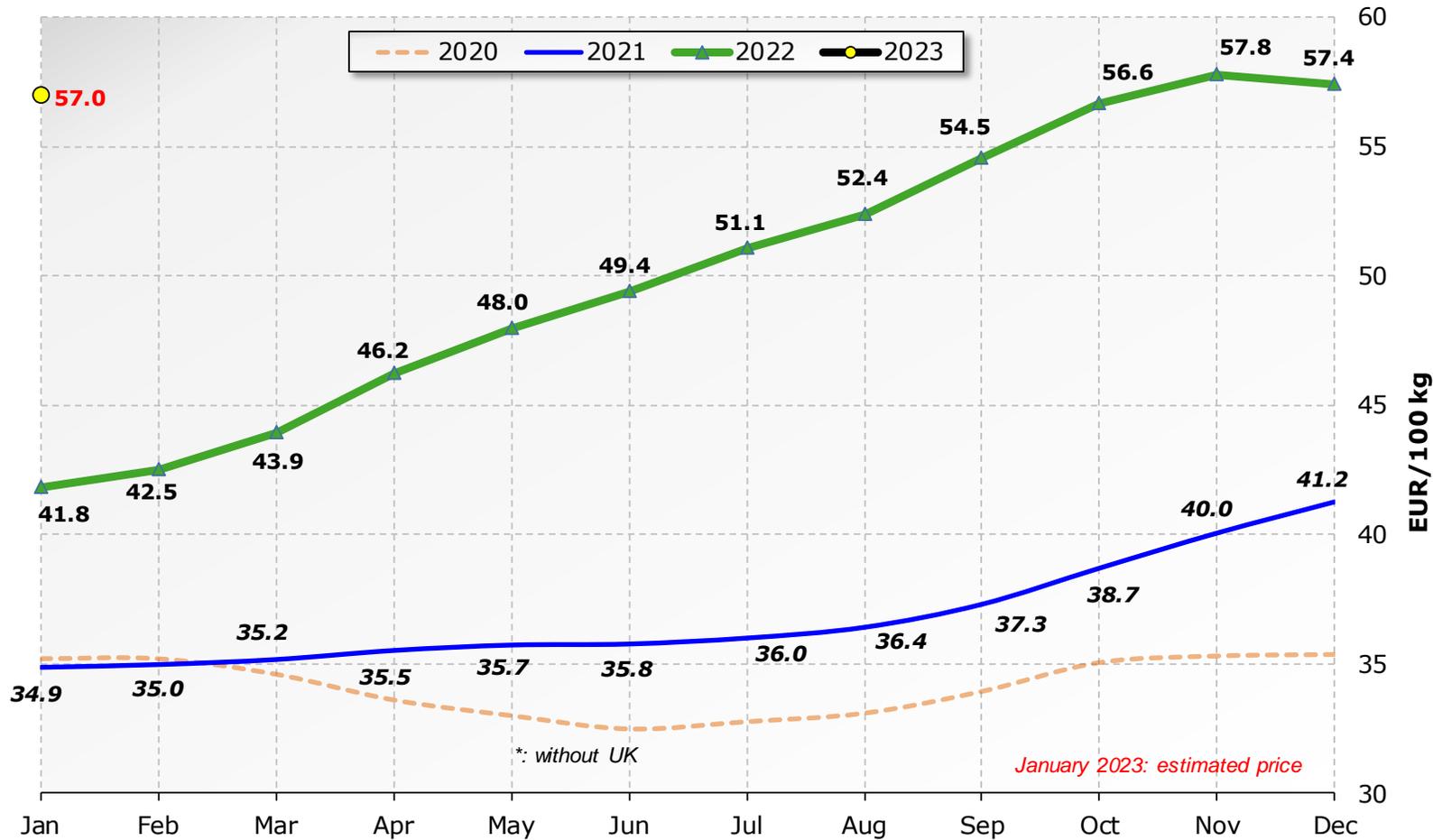
* not including LU (confidential data)



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

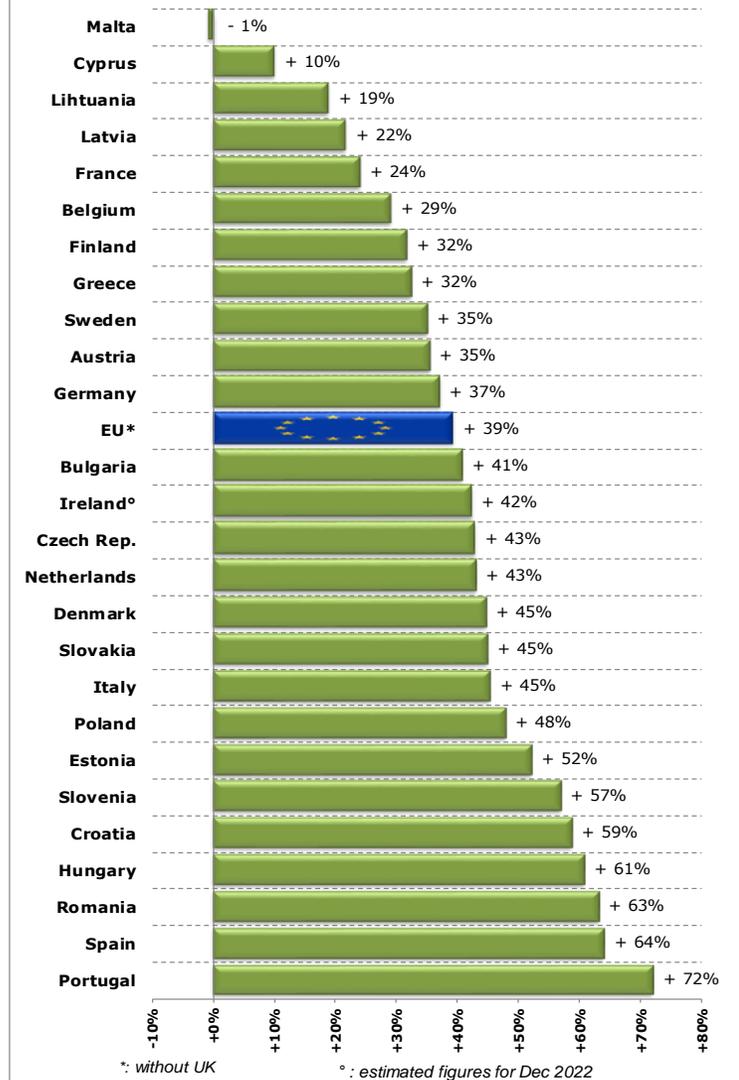
EU milk prices paid to the producers

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



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

Raw Milk Price evolution in December 2022 compared to December 2021

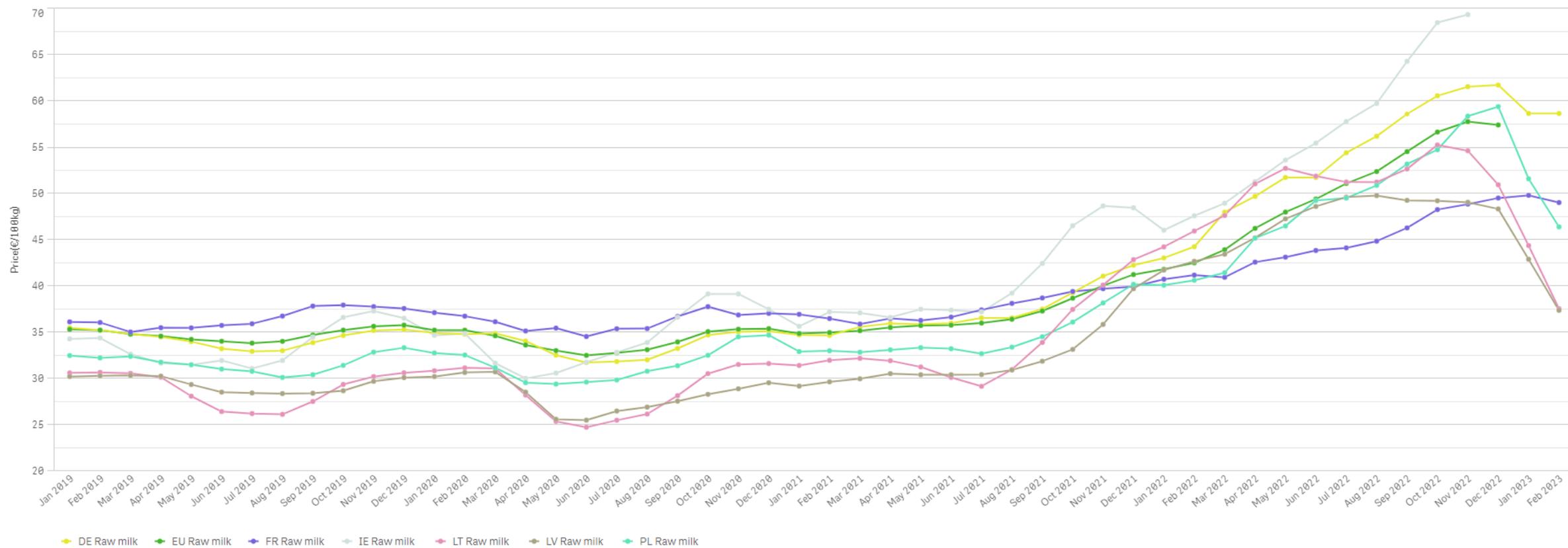


Source : Member States (Reg. (EU) No 2017/1185 Article 12(a) - Annex II.4(a))

Raw milk prices in some MS vs. EU avg.

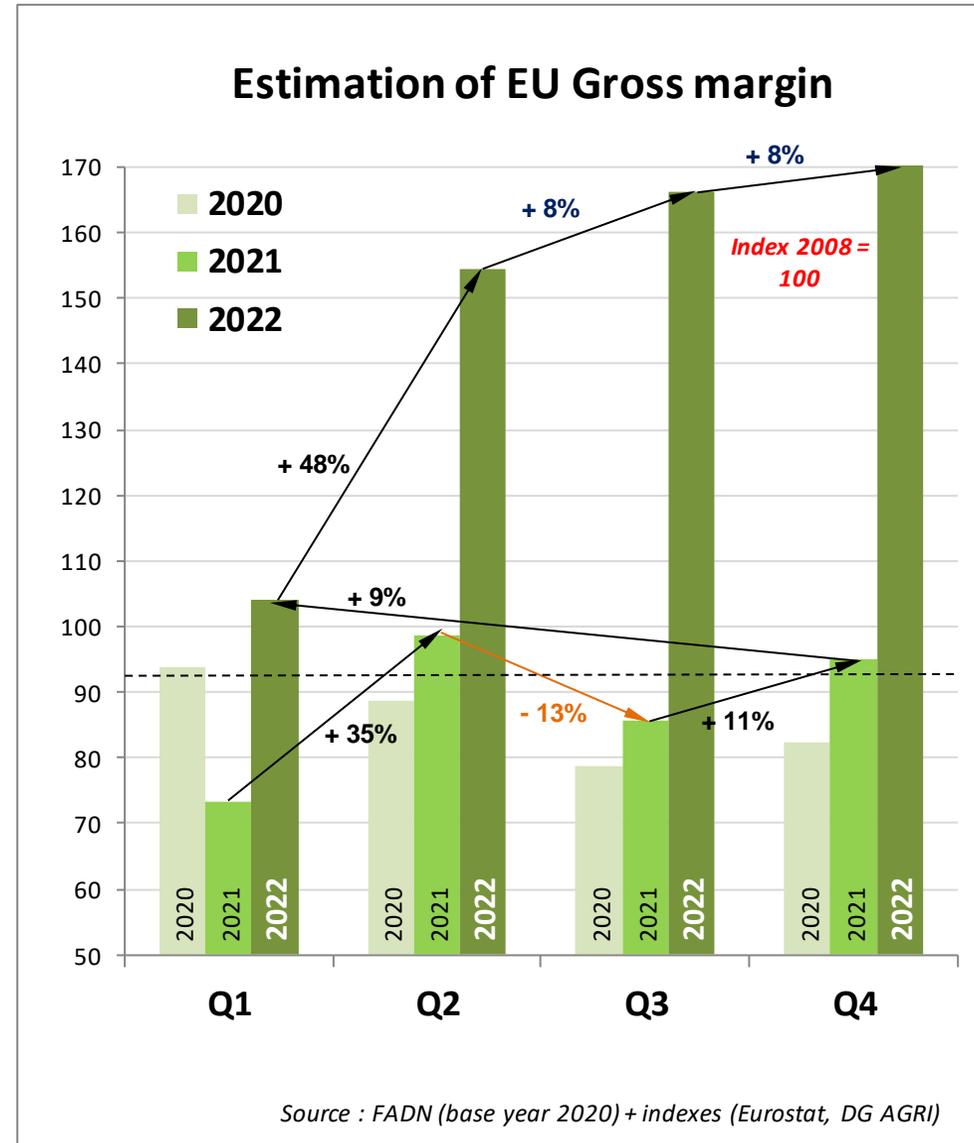
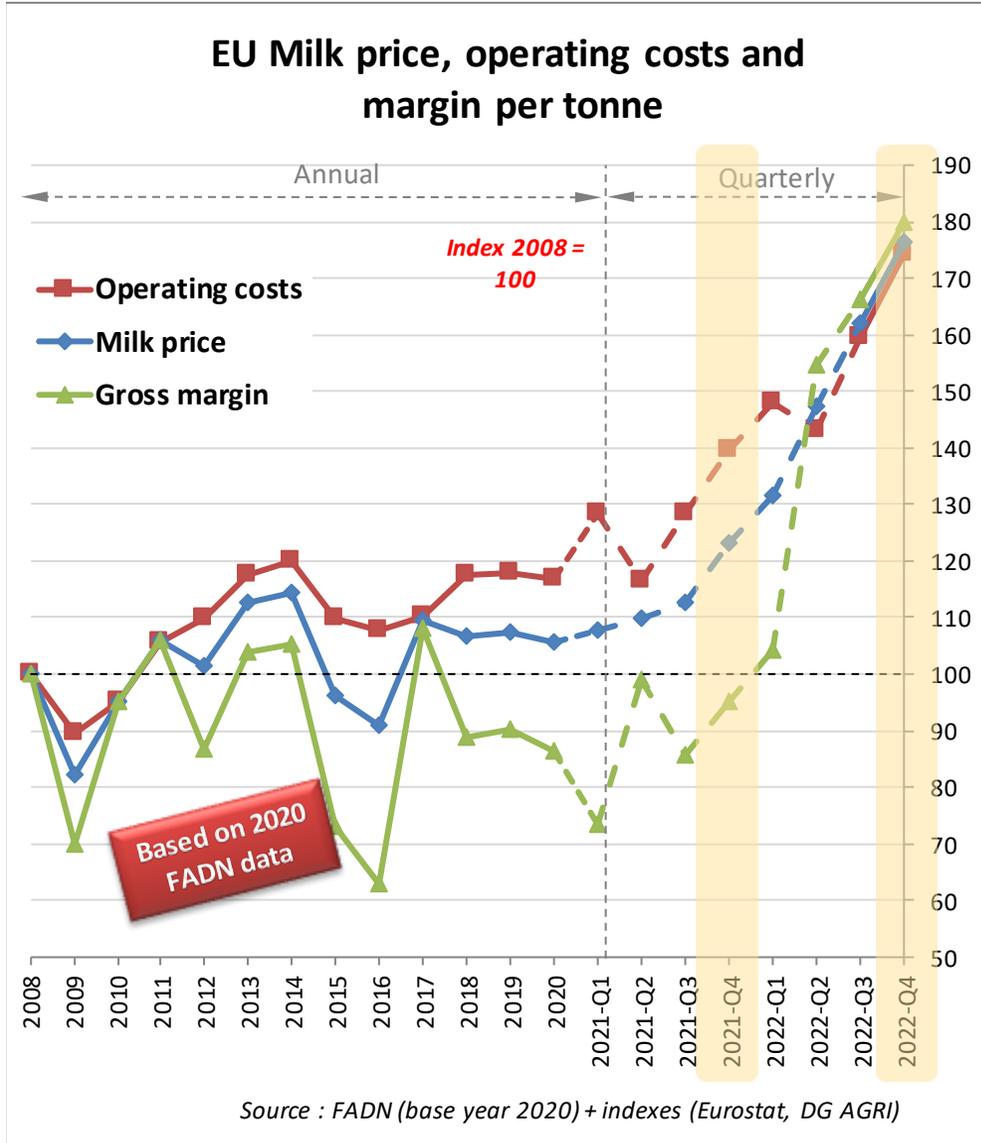
Raw milk price evolution for European Union, France, Germany, Ireland, Latvia, Lithuania, Poland

Year Selection: 2019, 2020, 2021, 2022, 2023

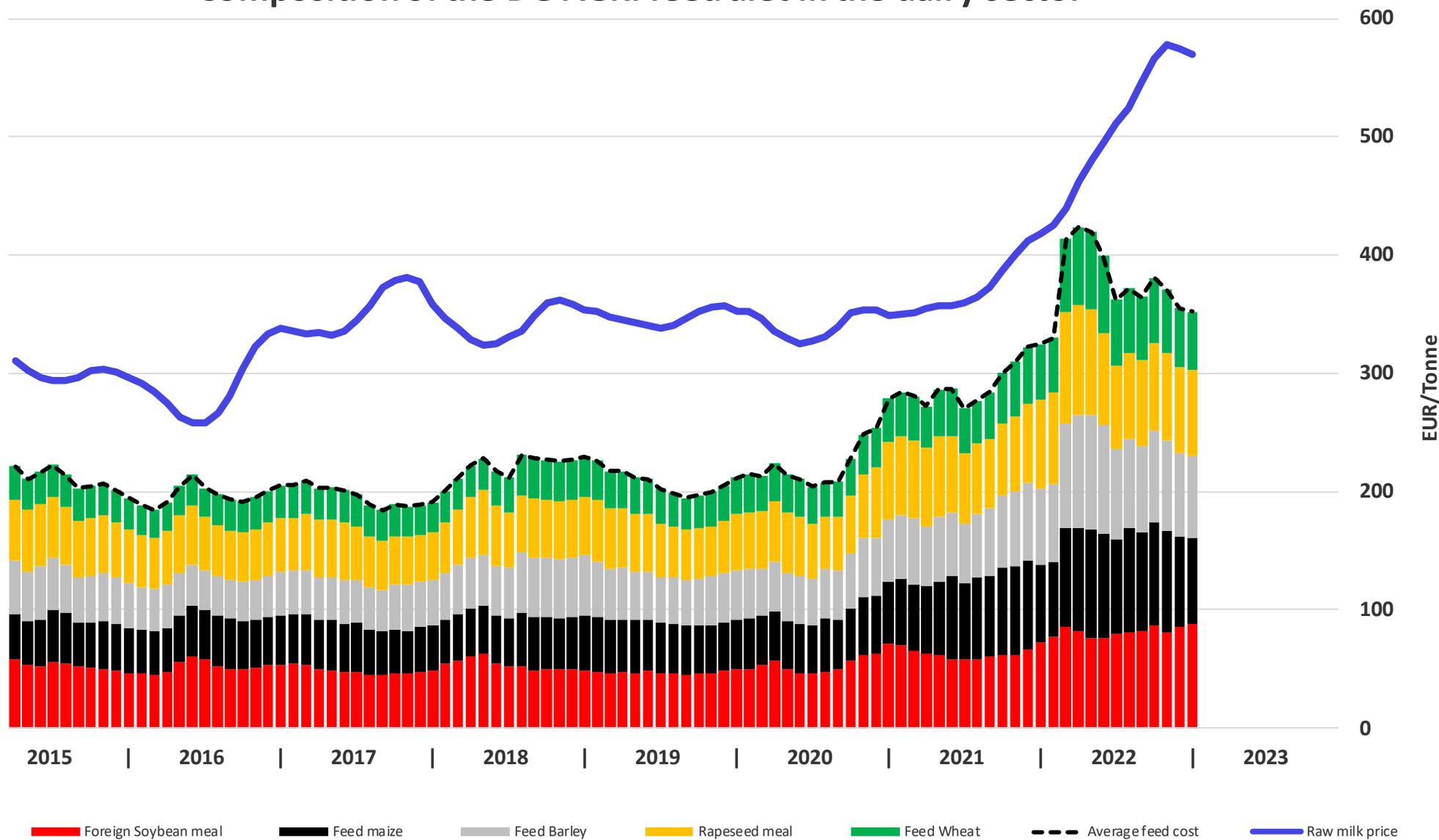


Prices for the European Union are calculated as a weighted average of price data from all Member States.

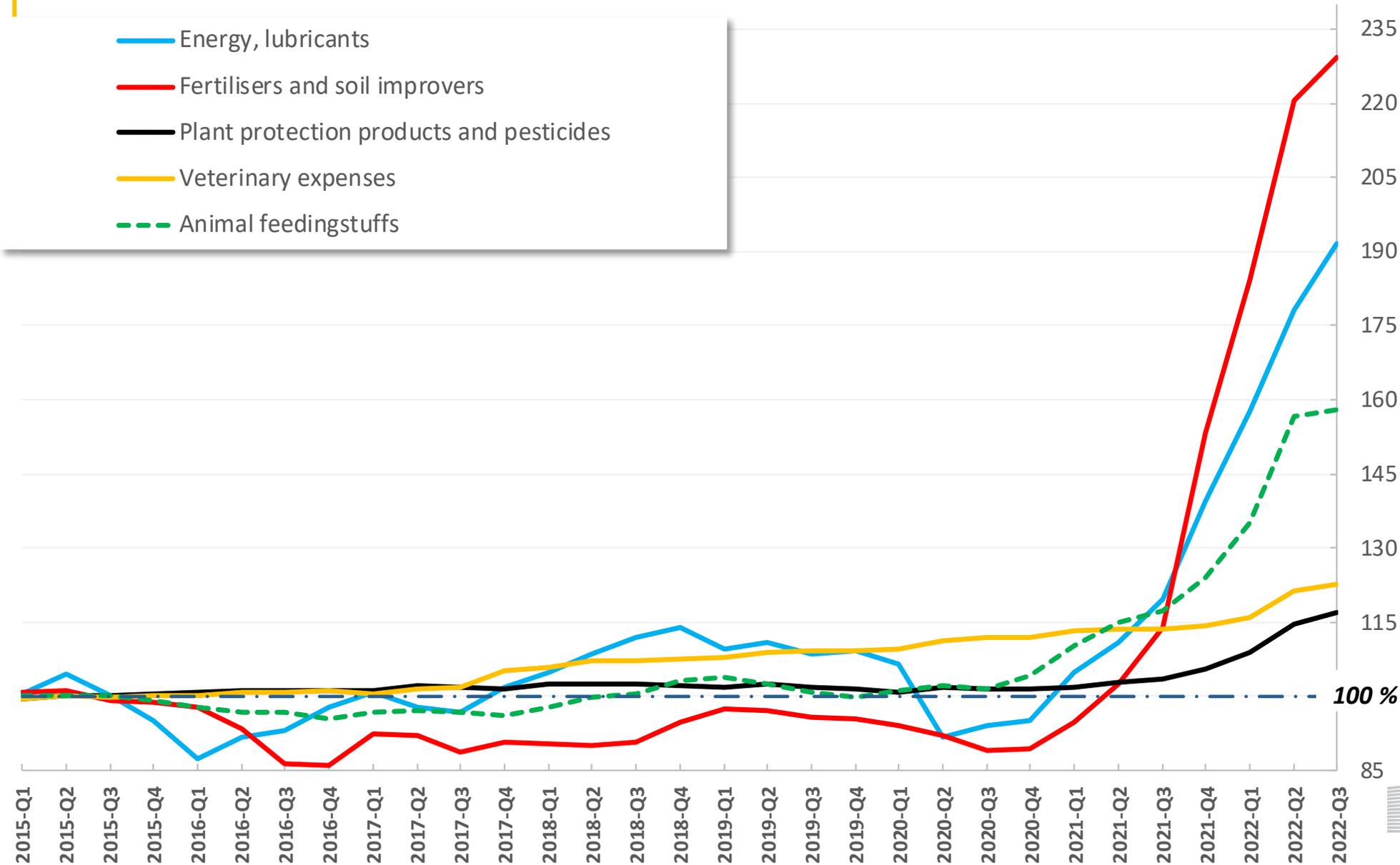
Margins



Composition of the DG AGRI feed diet in the dairy sector



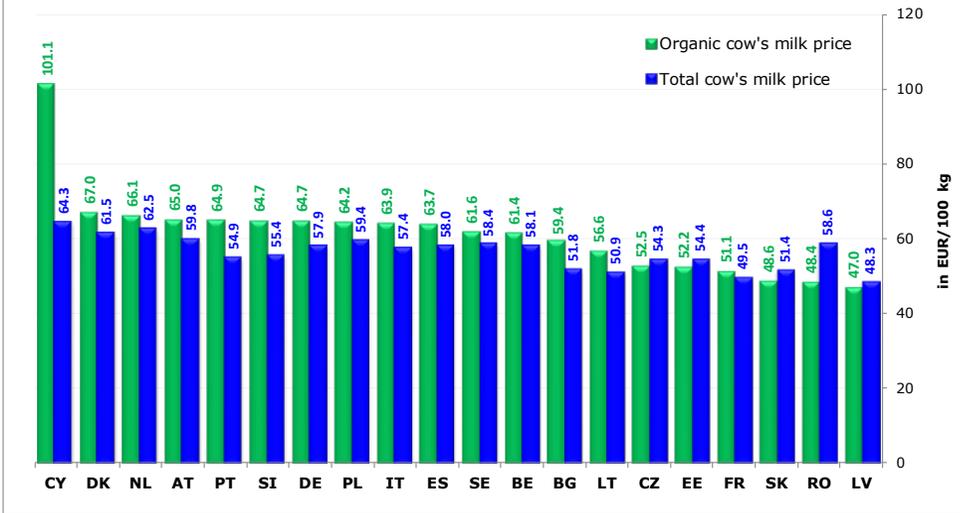
Price indices of the means of agricultural production (2015=100)



EU organic raw milk production & prices

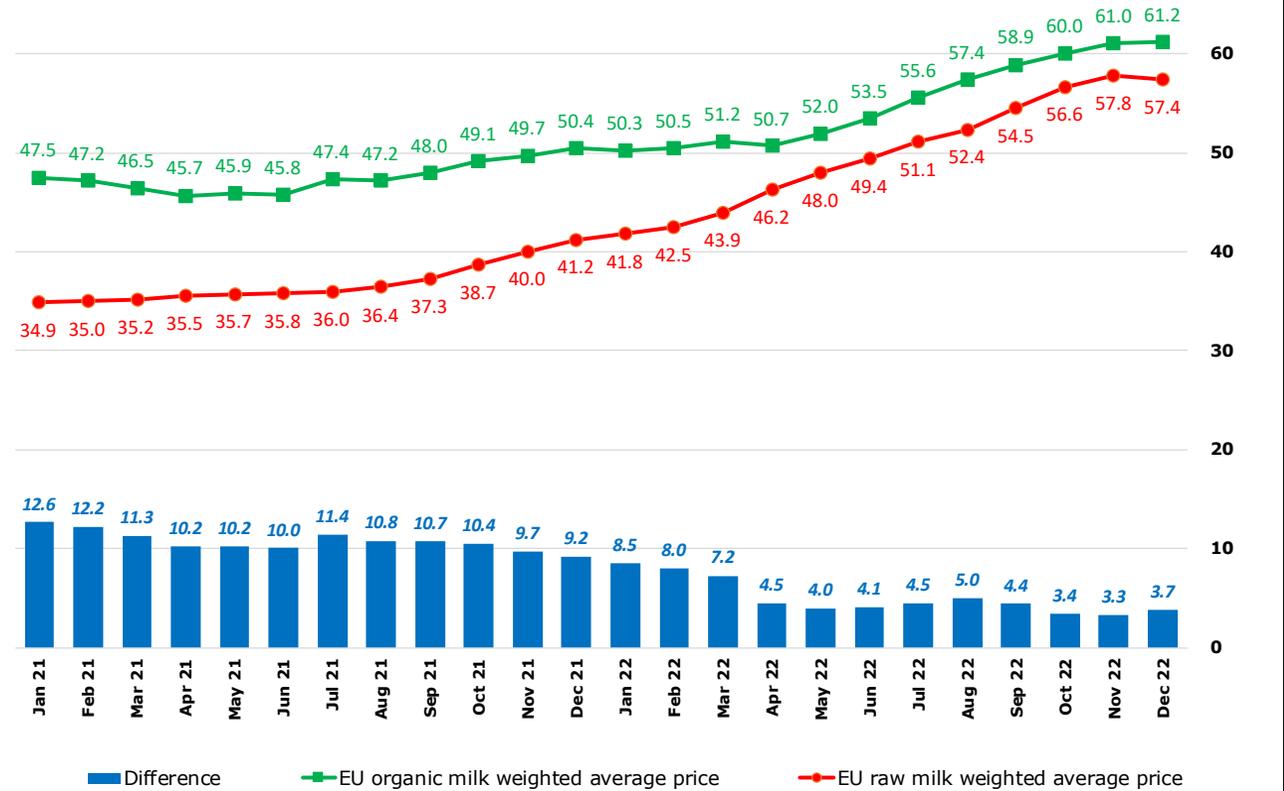
EU Organic cow's milk prices December 2022

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



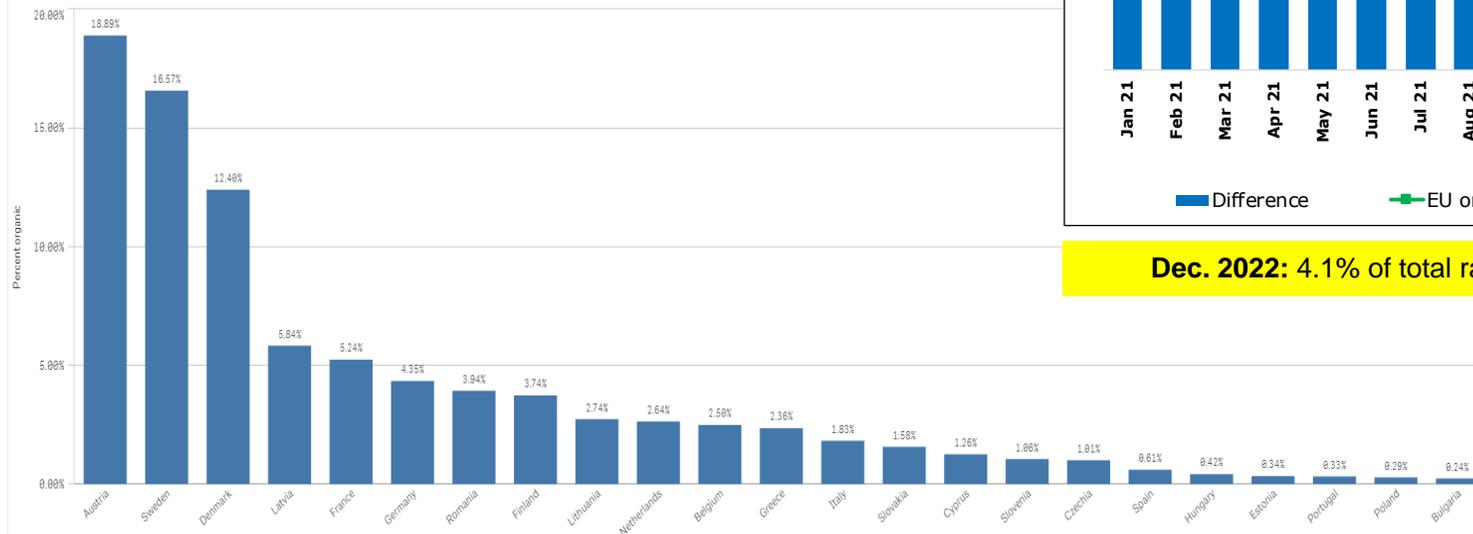
EU raw milk and organic milk prices

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



Dec. 2022: 4.1% of total raw milk collected was organic (based on notifications from 23 MS)

Organic raw cow's milk delivered to dairies as a percentage of total raw cow's milk
For years: 2022 > Months: 12 > All Member States



EU evolutive* dairy Quotations

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

Latest prices
(EUR/100kg)

498	264	355	460	438	466	680	79
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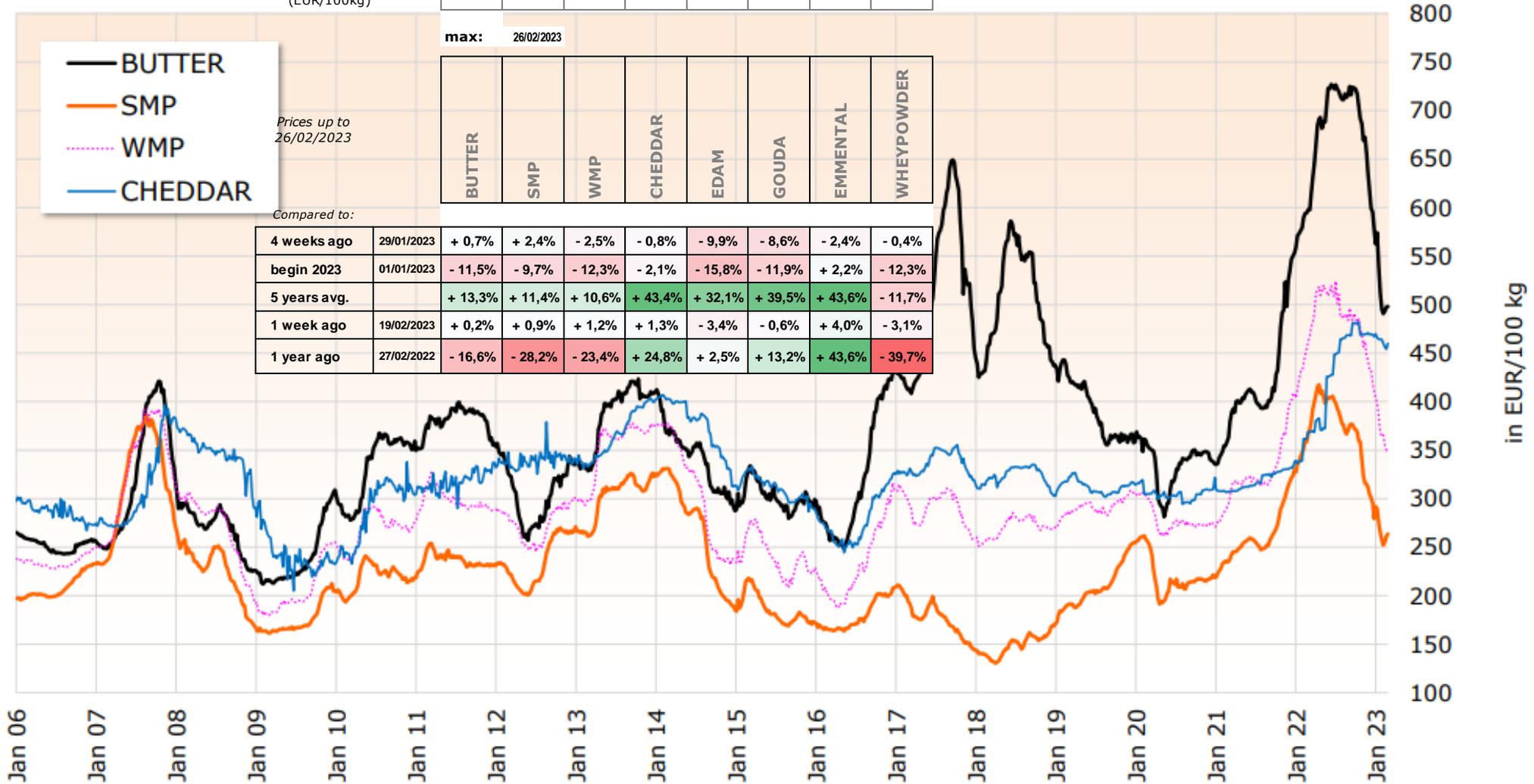
max: 26/02/2023

	BUTTER	SMP	WMP	CHEDDAR	EDAM	GOUDA	EMMENTAL	WHEYPOWDER
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Prices up to
26/02/2023

Compared to:

		BUTTER	SMP	WMP	CHEDDAR	EDAM	GOUDA	EMMENTAL	WHEYPOWDER
4 weeks ago	29/01/2023	+ 0,7%	+ 2,4%	- 2,5%	- 0,8%	- 9,9%	- 8,6%	- 2,4%	- 0,4%
begin 2023	01/01/2023	- 11,5%	- 9,7%	- 12,3%	- 2,1%	- 15,8%	- 11,9%	+ 2,2%	- 12,3%
5 years avg.		+ 13,3%	+ 11,4%	+ 10,6%	+ 43,4%	+ 32,1%	+ 39,5%	+ 43,6%	- 11,7%
1 week ago	19/02/2023	+ 0,2%	+ 0,9%	+ 1,2%	+ 1,3%	- 3,4%	- 0,6%	+ 4,0%	- 3,1%
1 year ago	27/02/2022	- 16,6%	- 28,2%	- 23,4%	+ 24,8%	+ 2,5%	+ 13,2%	+ 43,6%	- 39,7%



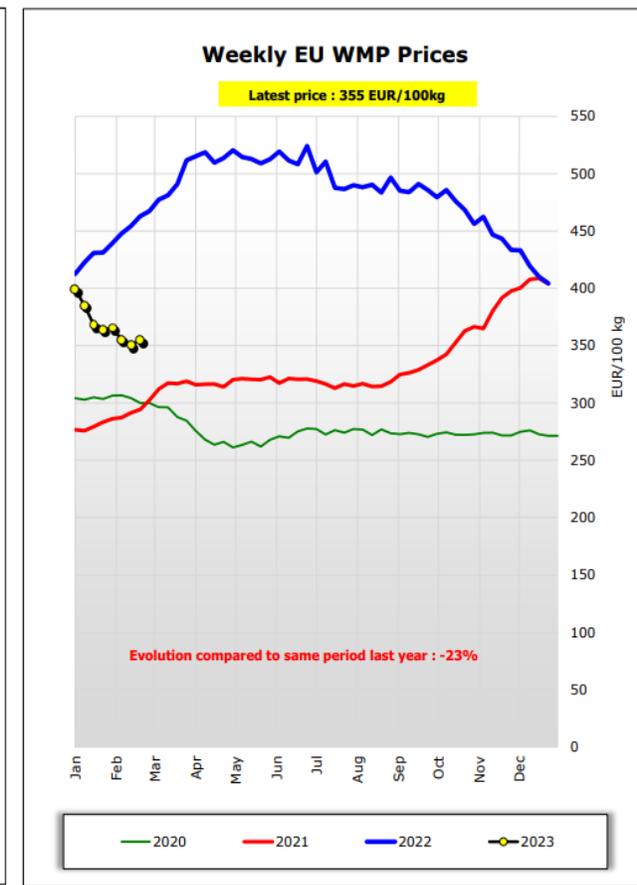
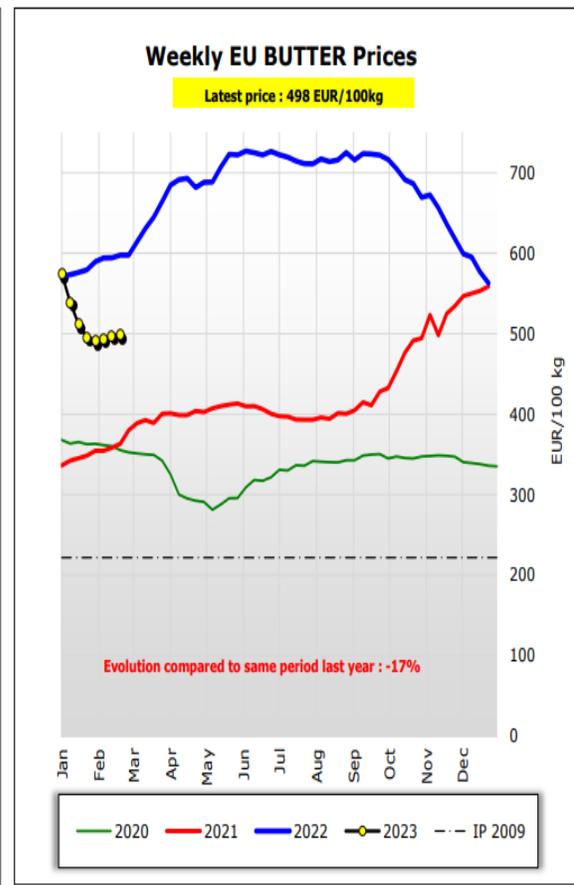
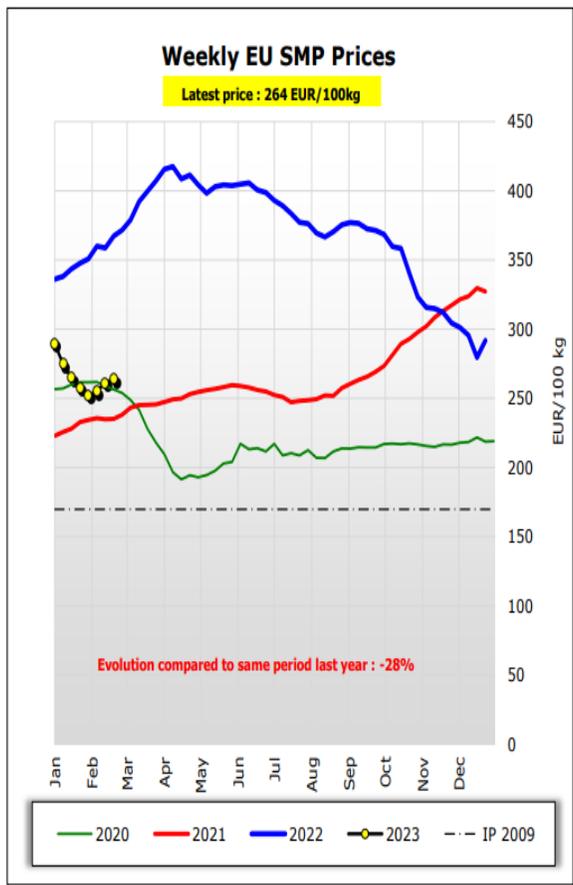
Source: Regulation (EU) No 2017/1185 Article 11 - Annex I.7



* 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)

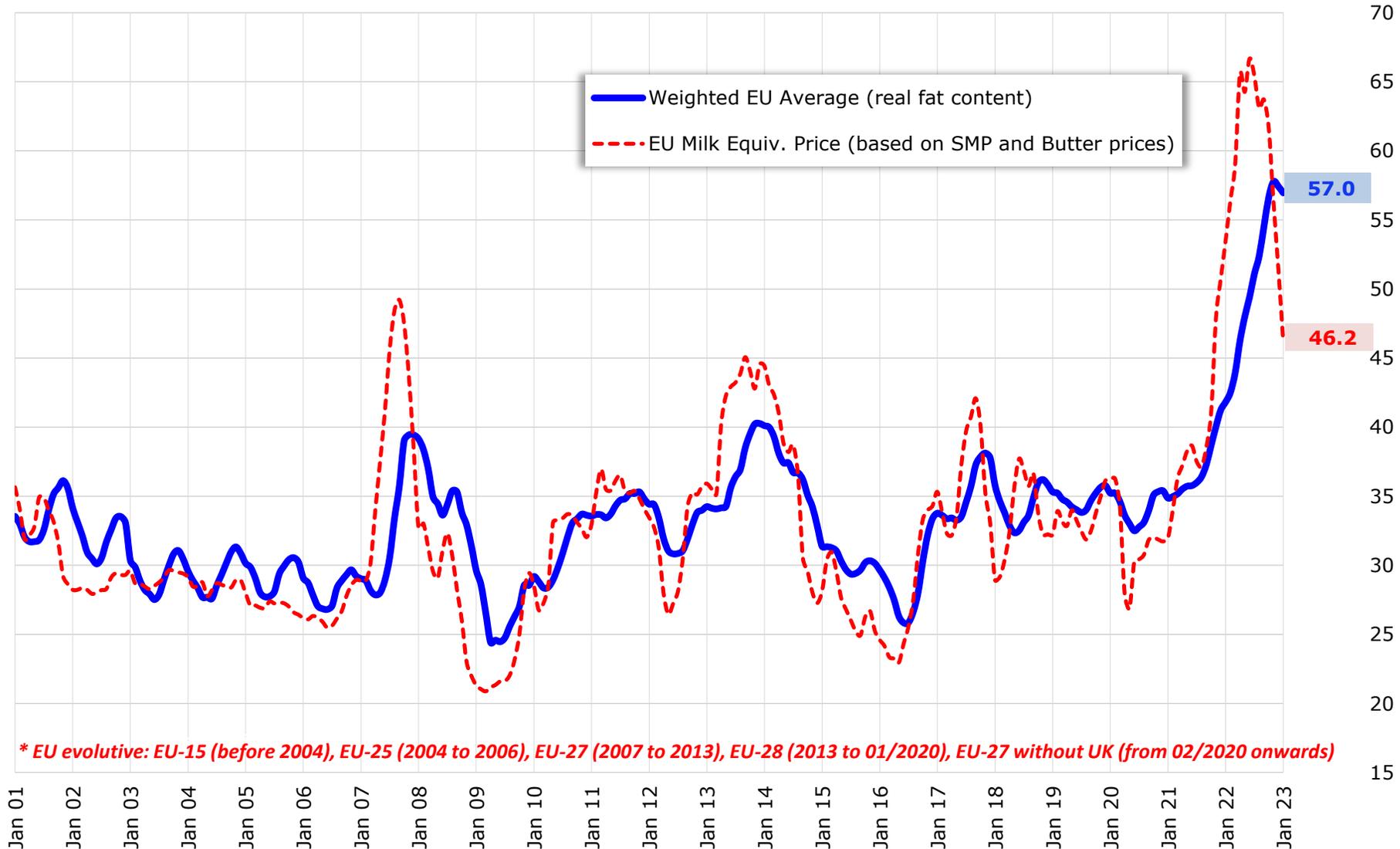
EU averages of main dairy commodities

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



EU evolutive² Raw Milk Prices Evolution (up to Jan 2023³)

EUR/100 kg



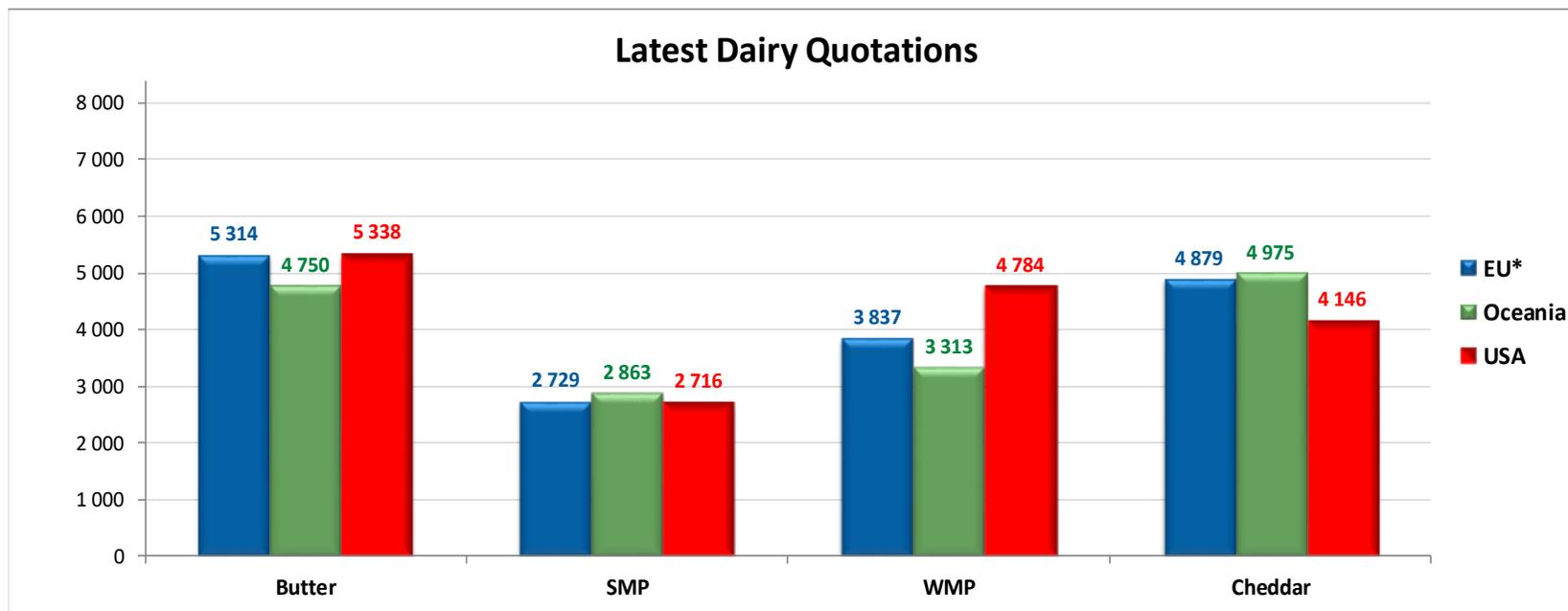
Source : MS' communications under Reg. (EU) No 2017/1185 Article 12(a) - Annex II.4(a)

Latest world dairy quotations

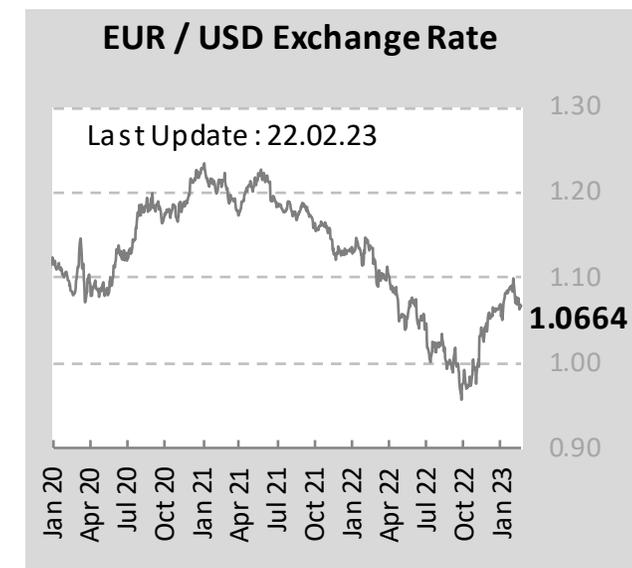
Latest World Quotations of Dairy Products

In US\$/t	Latest Quotations			Week - 2						Year - 1					
	19/02/2023			05/02/2023			% change (previous quotation)			20 February 2022			% change (1 year)		
	EU*	Oceania	USA	EU*	Oceania	USA	EU*	Oceania	USA	EU*	Oceania	USA	EU*	Oceania	USA
Butter	5 314	4 750	5 338	5 389	4 463	5 169	-1.4%	+6.4%	+3.3%	6 782	6 550	5 809	-22%	-27%	-8%
SMP	2 729	2 863	2 716	2 797	2 863	2 628	-2.4%	nc	+3.4%	4 109	4 225	4 103	-34%	-32%	-34%
WMP	3 837	3 313	4 784	3 953	3 175	4 828	-2.9%	+4.3%	-0.9%	5 111	4 325	4 982	-25%	-23%	-4%
Cheddar	4 879	4 975	4 146	5 040	4 963	4 138	-3.2%	+0.3%	+0.2%	4 126	5 713	4 377	+18%	-13%	-5%

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

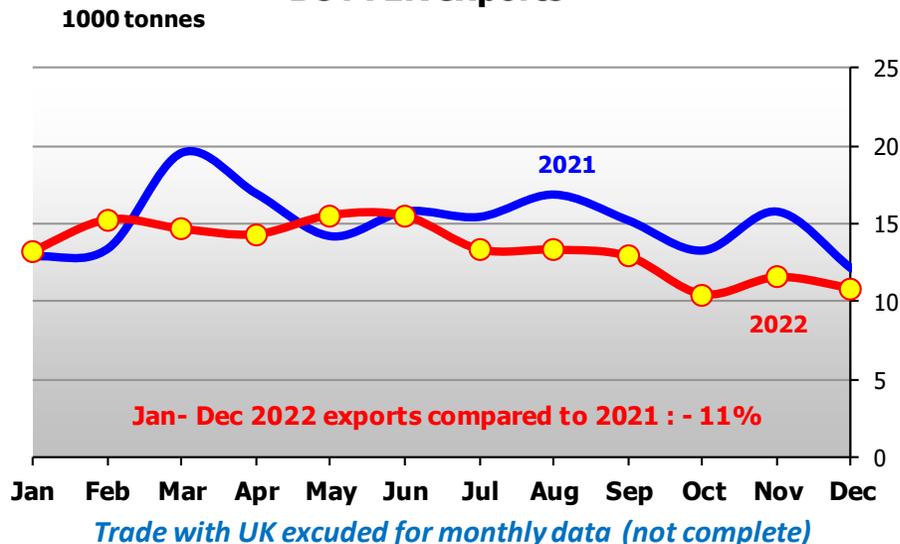


EU* = EU without UK

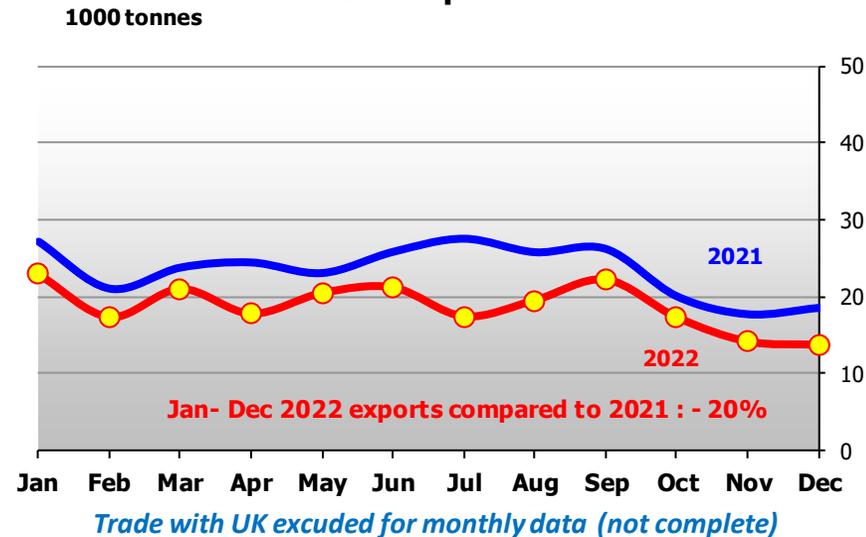


EU Dairy Exports to Third countries (January-December)

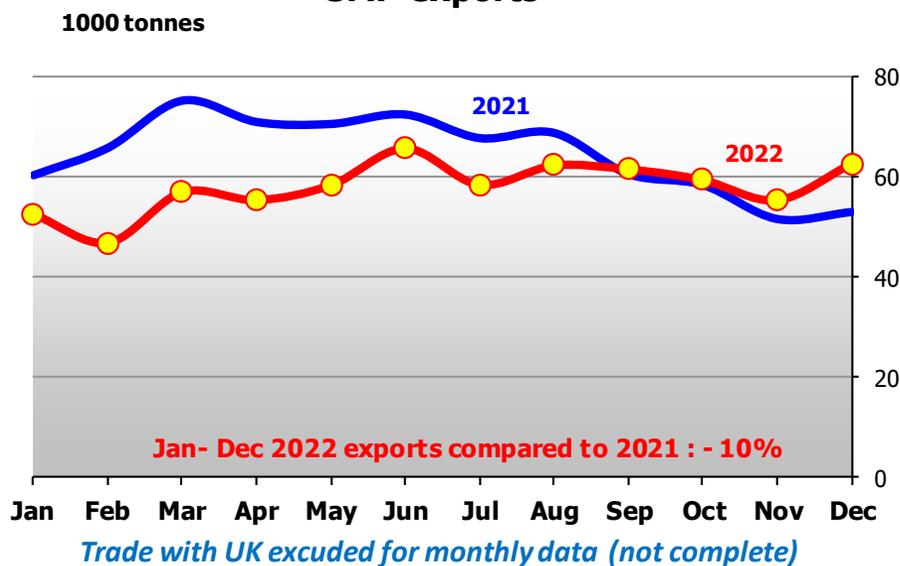
BUTTER exports



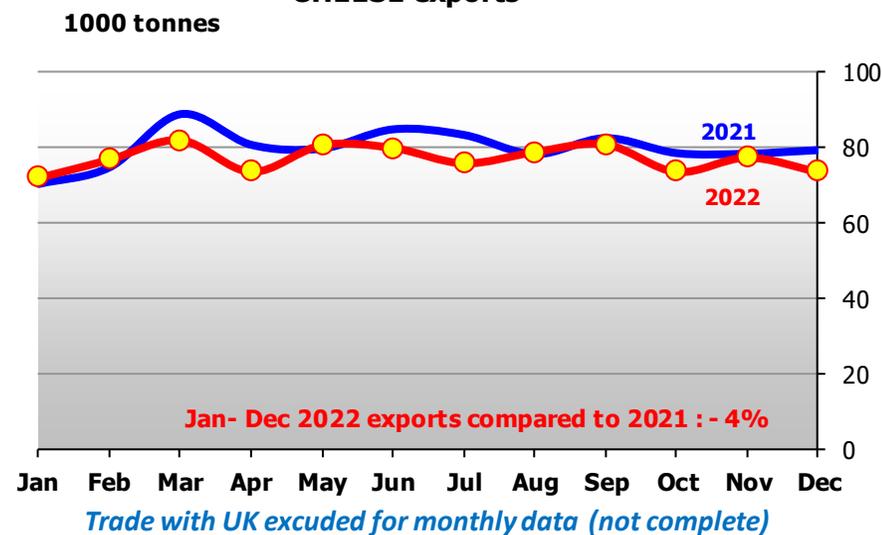
WMP exports



SMP exports



CHEESE exports



EU Exports of Dairy products - Main destinations

Source : COMEXT

Period : January-December

Quantity in Tonnes

EU EXPORTS of BUTTER - main destinations				
Period : January-December				
Qty Tons	2020	2021	2022	
USA	37 676	41 811	40 370	- 3%
China	14 635	16 315	11 371	- 30%
South Korea	7 700	10 675	10 653	- 0%
Saudi Arabia	17 728	9 436	9 016	- 4%
Switzerland	5 743	3 558	7 873	+ 121%
U.A.Emirates	6 210	4 843	5 659	+ 17%
Indonesia	3 191	3 651	5 343	+ 46%
Taiwan	5 117	5 342	5 059	- 5%
Singapore	6 410	6 129	4 945	- 19%
Morocco	10 168	9 016	3 392	- 62%
Australia	3 523	3 117	3 047	- 2%
Other	83 472	67 081	54 743	- 18%
Total (without UK)	201 573	180 974	161 472	 - 11%
United Kingdom°	49 377	38 973	54 342	+ 39%

* Trade with U.K. only available up to November 2022

EU EXPORTS of CHEESES - main destinations				
Period : January-December				
Qty Tons	2020	2021	2022	
USA	117 749	132 951	129 096	- 3%
Japan	128 049	118 334	119 814	+ 1%
Switzerland	69 216	72 632	70 901	- 2%
South Korea	53 014	49 074	59 351	+ 21%
Saudi Arabia	42 405	42 719	44 583	+ 4%
Ukraine	46 670	53 212	33 193	- 38%
China	26 801	38 418	29 374	- 24%
Canada	24 411	26 033	26 420	+ 1%
Australia	27 163	27 470	26 084	- 5%
Libya	15 831	20 582	22 438	+ 9%
Morocco	21 046	22 466	21 264	- 5%
Other	336 128	356 026	340 945	- 4%
Total (without UK)	908 484	959 919	923 462	 - 4%
United Kingdom°	446 846	391 913	389 339	- 1%

* Trade with U.K. only available up to November 2022

EU EXPORTS of SMP - main destinations				
Period : January-December				
Qty Tons	2020	2021	2022	
Algeria	118 551	89 047	112 442	+ 26%
China	121 462	125 141	83 681	- 33%
Indonesia	45 044	64 505	42 926	- 33%
Egypt	43 711	36 016	40 964	+ 14%
Nigeria	43 651	45 443	34 121	- 25%
Philippines	41 435	49 945	33 569	- 33%
Yemen	29 029	29 743	31 093	+ 5%
Malaysia	41 116	40 468	26 316	- 35%
Saudi Arabia	29 726	23 457	25 780	+ 10%
Morocco	7 560	10 574	25 461	+ 141%
Vietnam	20 558	19 917	20 336	+ 2%
Other	261 253	239 567	218 216	- 9%
Total (without UK)	803 096	773 821	694 905	 - 10%
United Kingdom°	25 171	12 945	13 923	+ 8%

* Trade with U.K. only available up to November 2022

EU EXPORTS of WMP - main destinations				
Period : January-December				
Qty Tons	2020	2021	2022	
Oman	47 698	39 118	50 856	+ 30%
China	16 085	22 521	21 301	- 5%
Kuwait	15 896	5 446	13 806	+ 154%
Trinidad,Tob	3 354	3 340	8 395	+ 151%
Dominican R.	9 717	6 509	7 802	+ 20%
Algeria	38 062	16 470	7 358	- 55%
Saudi Arabia	7 950	6 942	6 646	- 4%
Senegal	7 744	10 882	6 228	- 43%
Singapore	7 670	8 172	5 368	- 34%
Bangladesh	4 508	7 149	4 683	- 34%
Ivory Coast	3 976	5 719	3 871	- 32%
Other	151 729	147 722	88 309	- 40%
Total (without UK)	314 389	279 991	224 621	 - 20%
United Kingdom°	27 751	16 694	15 068	- 10%

* Trade with U.K. only available up to November 2022

2021 2022

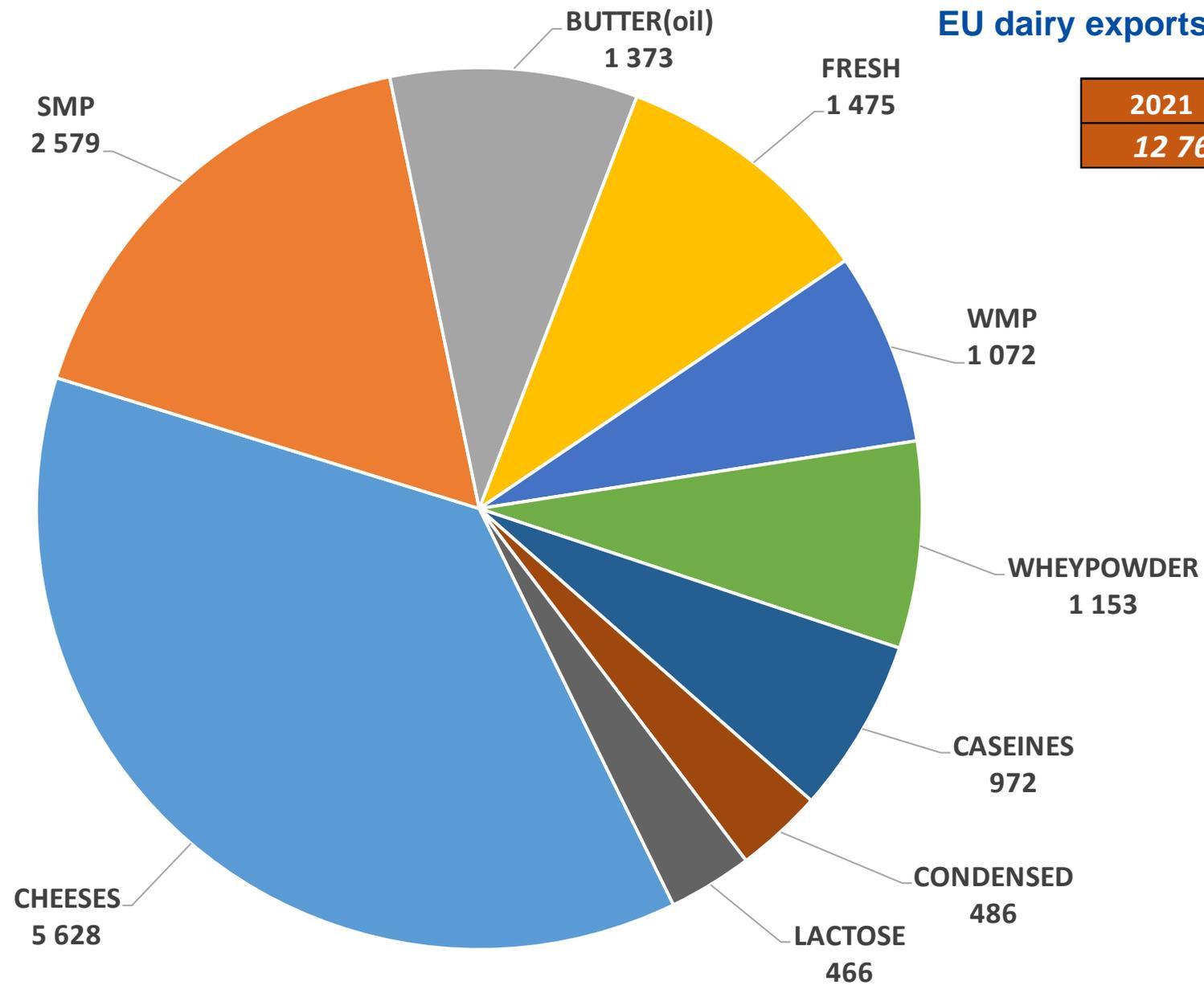
EU exports to third countries (excluding UK)

1000 EUR	Jan-Dec 2021	Jan-Dec 2022	EU % change
Condensed	472 266	485 914	+ 3%
SMP	2 009 054	2 578 668	+ 28%
WMP	997 338	1 072 114	+ 7%
Butter	958 763	1 185 589	+ 24%
Butteroil	138 699	187 867	+ 35%
Cheeses	4 745 144	5 627 808	+ 19%
Wheypowder	960 032	1 152 960	+ 20%
Total	10 281 296	12 290 921	 + 20%

2021 2022

EU exports to third countries (excluding UK)

in 1 000 t	Jan-Dec 2021	Jan-Dec 2022	EU % change
Condensed	291	250	- 14%
SMP	774	695	- 10%
WMP	280	225	- 20%
Butter	181	161	- 11%
Butteroil	25	24	- 6%
Cheeses	960	923	- 4%
Wheypowder	676	619	- 8%
Total in milk equiv.	15 960	14 510	 - 9%



EU dairy exports Jan-Dec 2022 (x mio €)

2021	2022	Δ
12 769	15 203	+ 19%

EU imports of butter and cheeses in 2022

EU IMPORTS of BUTTER - main origins				
Period : January-December				
Qty Tons	2020	2021	2022	
Ukraine	5	132	6 464	+++
New Zealand	666	1 207	3 069	↑ + 154%
Turkey	9	12	2 657	+++
Norway	2	1	550	+++
USA	160	1 380	222	↓ - 84%
Egypt			92	
Iceland	100	293	74	↓ - 75%
Algeria			50	
China		88	25	↓ - 71%
Malaysia			15	
Switzerland	12	12	7	↓ - 45%
Other	330	359	10	↓ - 97%
Total (without UK)	1 284	3 483	13 235	↑ +++
United Kingdom [°]	23 831	22 455	29 517	↑ + 31%

[°] Trade with U.K. only available up to November 2022

EU IMPORTS of CHEESES - main origins				
Period : January-December				
Qty Tons	2020	2021	2022	
Switzerland	55 286	60 171	56 624	↓ - 6%
Norway	1 274	1 252	3 453	↑ + 176%
Ukraine	0	0	3 245	+++
Serbia	1 551	1 914	2 232	↑ + 17%
Turkey	809	1 079	1 604	↑ + 49%
Bosnia-Herz.	425	806	893	↑ + 11%
USA	764	274	640	↑ + 133%
Iceland	42	115	285	↑ + 147%
North Macedonia	35	71	230	↑ +++
Australia	652	538	153	↓ - 72%
Canada	59	71	136	↑ + 91%
Other	481	756	324	↓ - 57%
Total (without UK)	61 379	67 047	69 818	↔ + 4%
United Kingdom [°]	141 534	119 962	108 898	↓ - 9%

[°] Trade with U.K. only available up to November 2022

MAIN EXPORTING THIRD COUNTRIES

MAIN IMPORTING THIRD COUNTRIES

Jan-Dec 2022 compared to 2021	BUTTER(OIL)		CHEESE		S.M.P.		W.M.P.		Jan-Dec 2022 compared to 2021	BUTTER(OIL)		CHEESE		S.M.P.		W.M.P.	
	Qty in ktons	% 2022 /21		Qty in ktons	% 2022 /21												
New Zealand	448	↑ +14%	343	↓ -4%	359	↑ +10%	1 335	↓ -17%	China	143	↔ +9%	145	↓ -17%	335	↓ -21%	701	↓ -17%
EU*	190	↓ -10%	923	↓ -4%	695	↓ -10%	225	↓ -20%	United Kingdom	51	↔ -3%	409	↔ +2%	12	↓ -18%	19	↔ -6%
United States	82	↑ +43%	454	↑ +12%	831	↔ -6%	39	↔ -1%	Saudi Arabia	45	↑ +12%	193	↑ +10%	18	↑ +21%	101	↔ -4%
Australia	14	↓ -30%	146	↔ -7%	154	↔ -1%	58	↑ +12%	Indonesia	29	↑ +43%	31	↔ +2%	215	↔ +8%	94	↑ +50%
United Kingdom	48	↔ -8%	176	↑ +15%	47	↔ -9%	24	↓ -12%	Japan	10	↓ -16%	274	↔ -5%	20	↔ -7%	3	↑ +41%
Argentina	12	↓ -27%	57	↔ +9%	16	↑ +45%	133	↔ +4%	Mexico	4	↑ +22%	113	↑ +21%	220	↑ +91%	1	↓ -67%

Source : IHS Markit/GTA

Keep in touch and thank you!



ec.europa.eu/agriculture



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