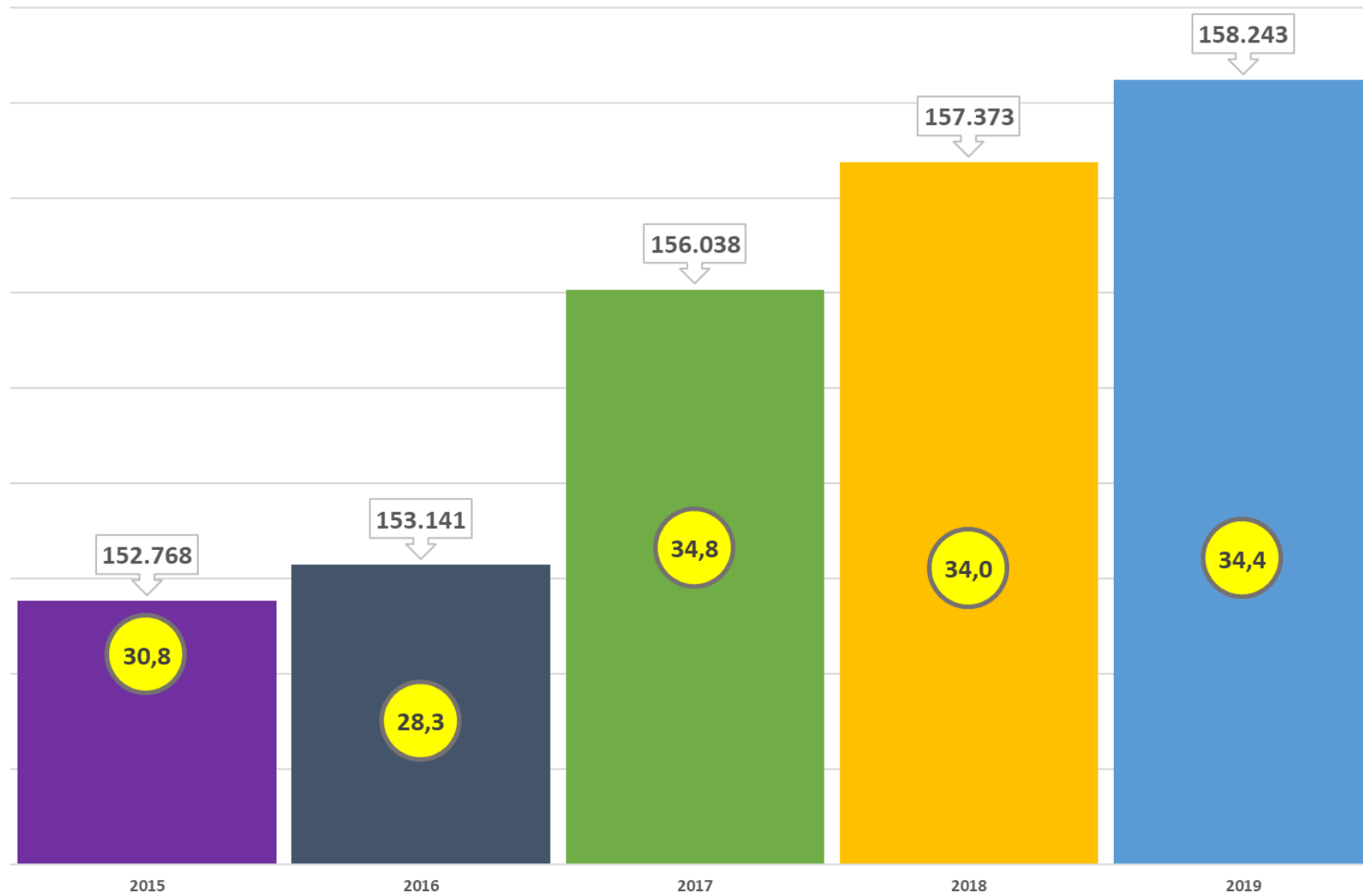




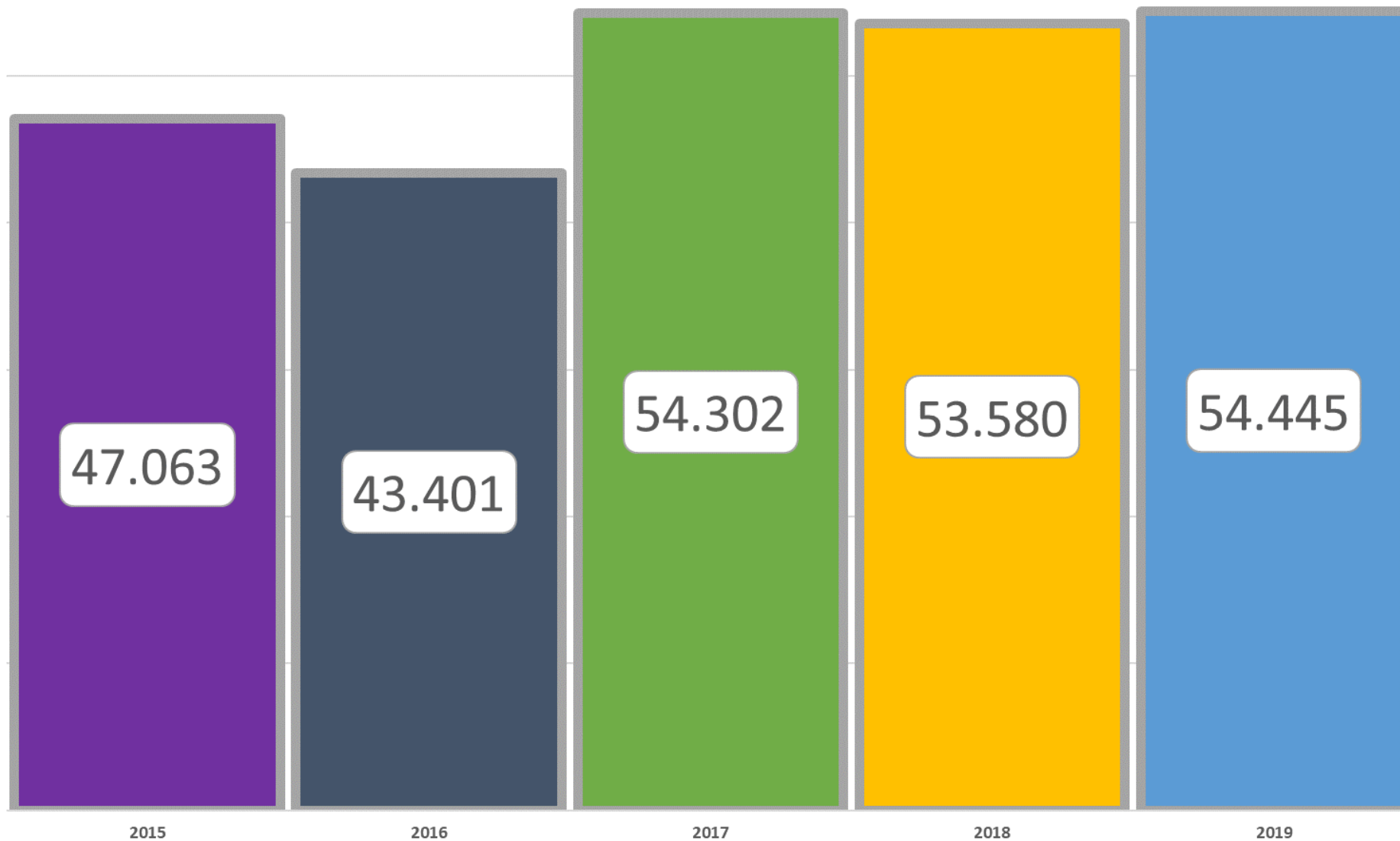
Milk Market Situation

Brussels, 5 March 2020

EU+UK milk deliveries and price
Jan-Dec. 2015-19 (x1000 t, c/kg)



EU+UK value milk production
Jan-Dec 2015-19 (x million €)



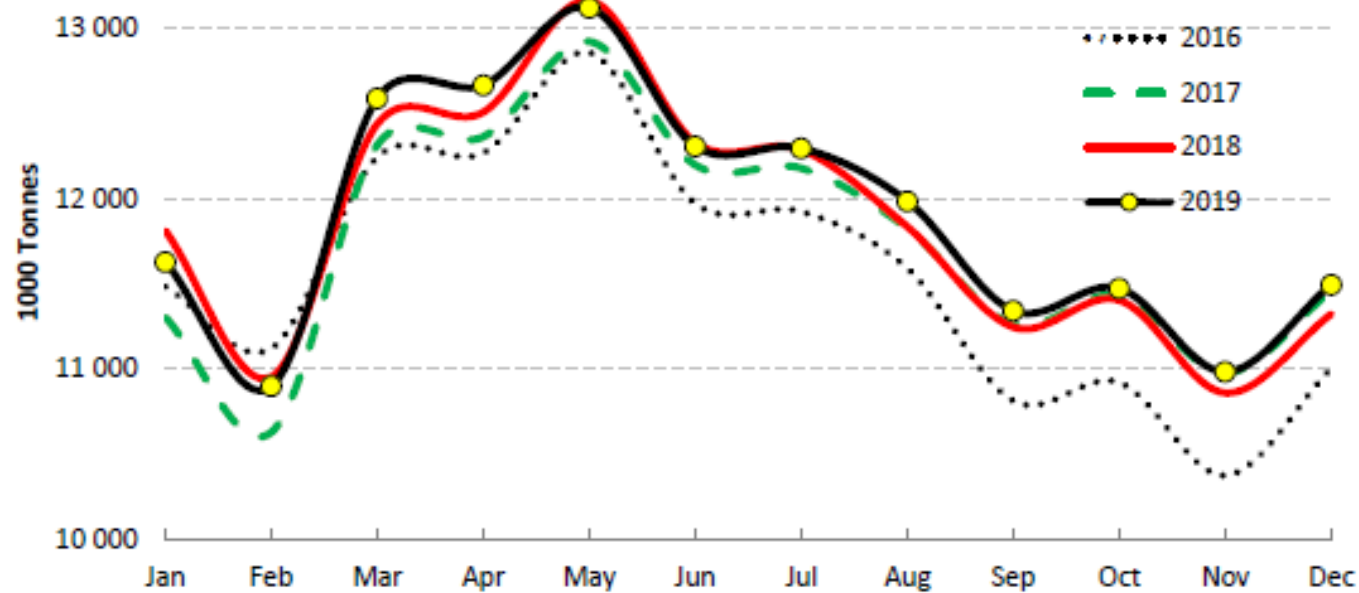
Dec 19 compared to Dec 18

Rank	evolution in %		evolution in 1000 Tons	
	MS	%	MS	Tons
1.	EL	+ 11.6%	NL	+ 41
2.	BG	+ 10.8%	DE	+ 29
3.	LU	+ 7.8%	FR	+ 23
4.	CY	+ 5.0%	ES	+ 21
5.	HU	+ 4.5%	PL	+ 18
6.	CZ	+ 3.7%	BE	+ 13
7.	BE	+ 3.7%	IT	+ 12
8.	NL	+ 3.7%	CZ	+ 9
9.	ES	+ 3.5%	EL	+ 6
10.	PT	+ 3.4%	HU	+ 6
11.	SI	+ 2.9%	PT	+ 5
12.	SK	+ 1.9%	BG	+ 5
13.	EE	+ 1.9%	AT	+ 4
14.	PL	+ 1.8%	LU	+ 3
15.	AT	+ 1.7%	SI	+ 1
16.	LV	+ 1.4%	SK	+ 1
17.	IT	+ 1.2%	EE	+ 1
18.	DE	+ 1.1%	CY	+ 1
19.	FR	+ 1.1%	LV	+ 1
20.	LT	+ 0.7%	FI	+ 1
21.	FI	+ 0.4%	LT	+ 1
22.	RO	+ 0.0%	RO	+ 0
23.	MT	- 0.3%	MT	- 0
24.	DK	- 0.7%	HR	- 1
25.	HR	- 3.2%	DK	- 3
26.	SE	- 3.6%	SE	- 9
27.	IE	- 5.7%	IE	- 15
EU*		+ 1.5%	EU*	+ 173
UK		- 1.5%	UK	- 19
EU+UK		+ 1.2%	EU+UK	+ 154

*: EU without UK

EU* - Cows' milk collected

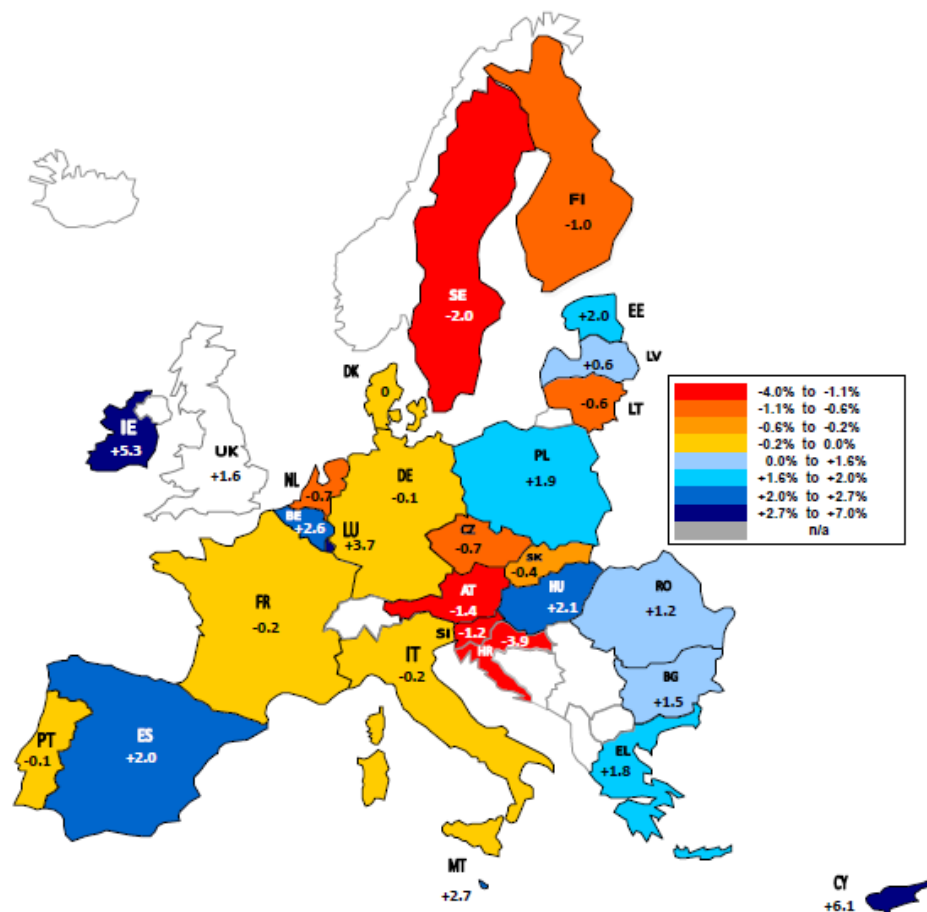
Jan-Dec 2019/18: + 0.4%



Source : Estat - Newcronos

EU Milk Deliveries compared to last period (in %)

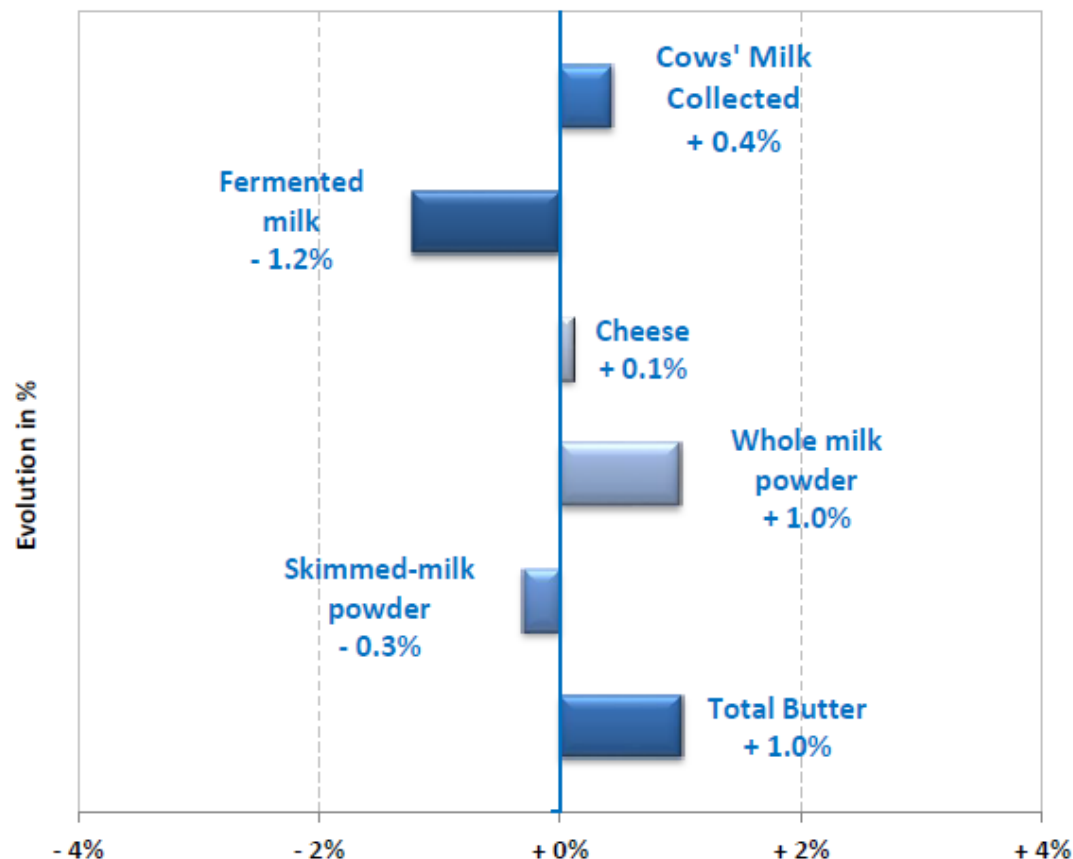
(Jan - Dec 2019 / Jan - Dec 2018)



Source : MS' Communications to Eurostat, FEQA, 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.

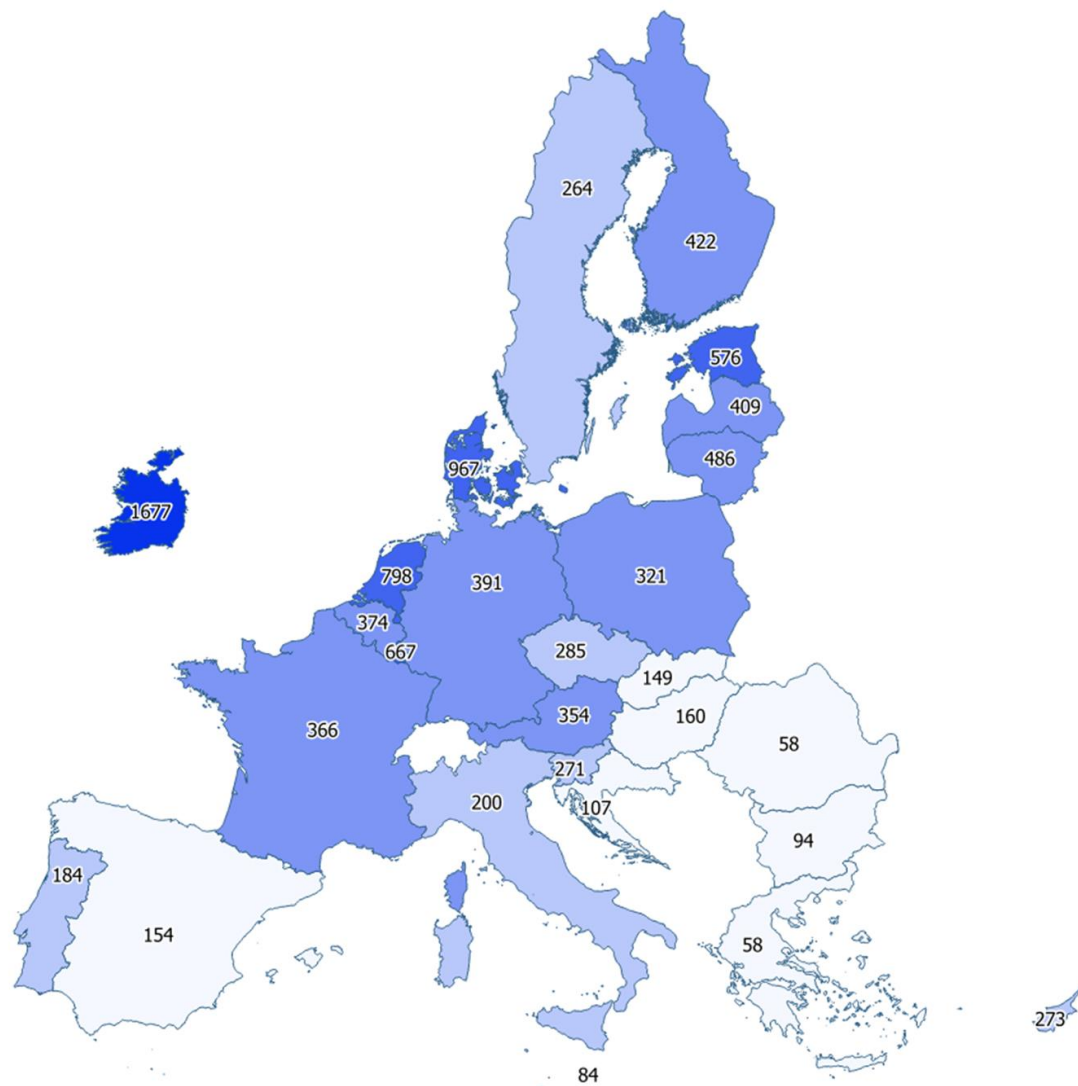
EU* Deliveries/Productions development (Jan-Dec 2019 compared to Jan-Dec 2018)



Source : MS' Communications to Eurostat,
and, for milk : AGEA, FEQA,
Reg. 2017/1185

*: EU without UK

EU milk deliveries per head in 2019 (kg/head)



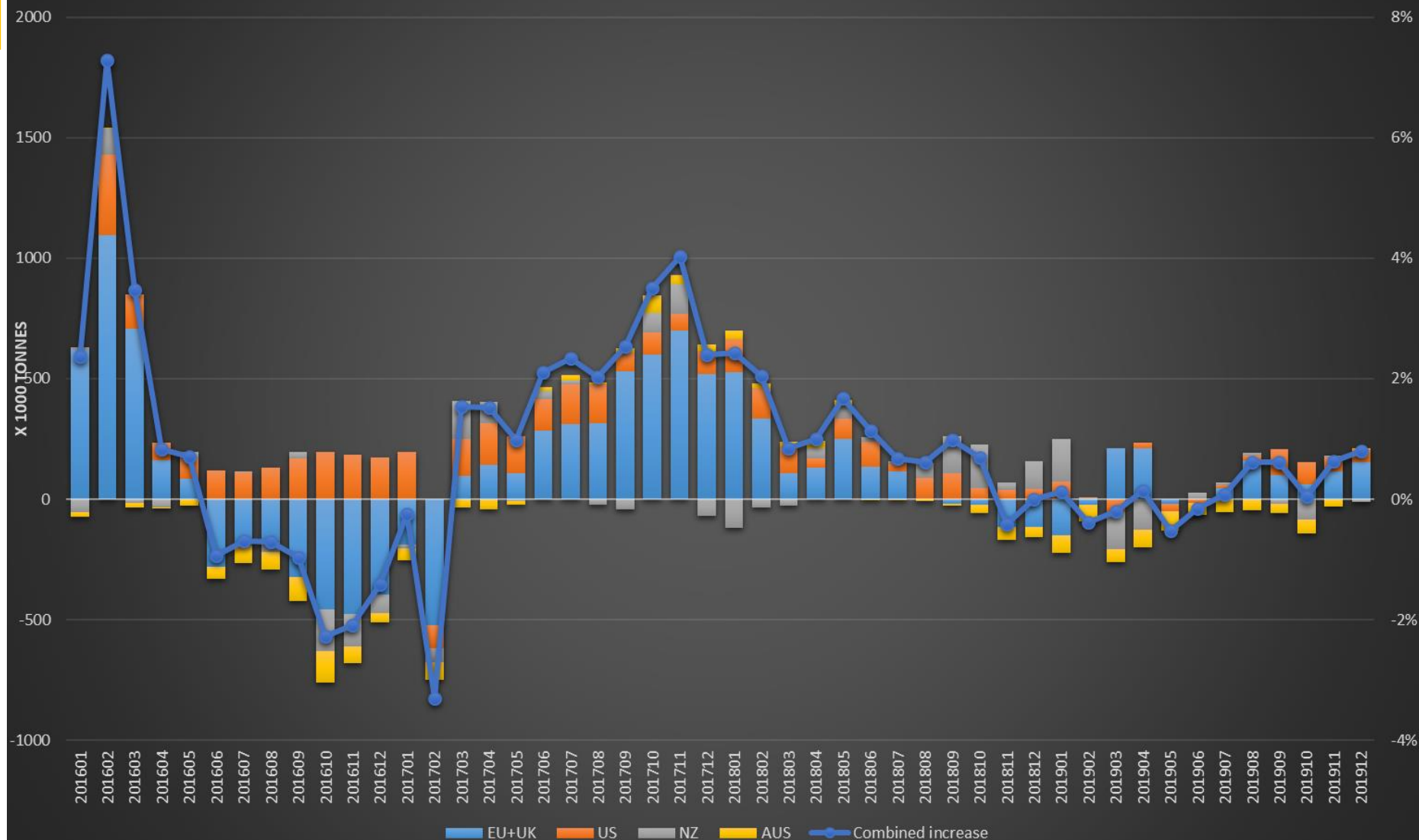
Source: Eurostat

Top 10 milk collection per MS (2019)

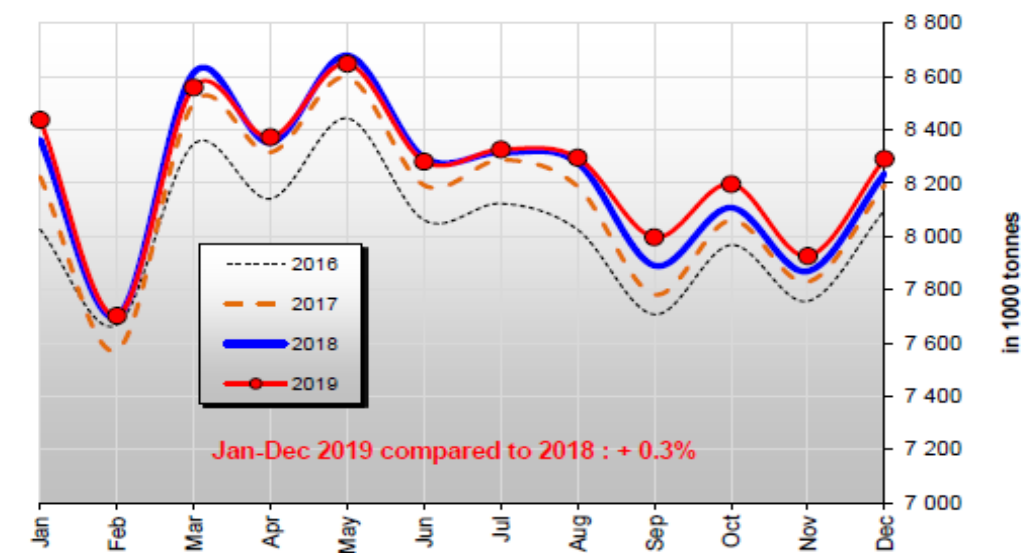


* without UK

EU+UK+US+NZ+AUS combined milk production growth

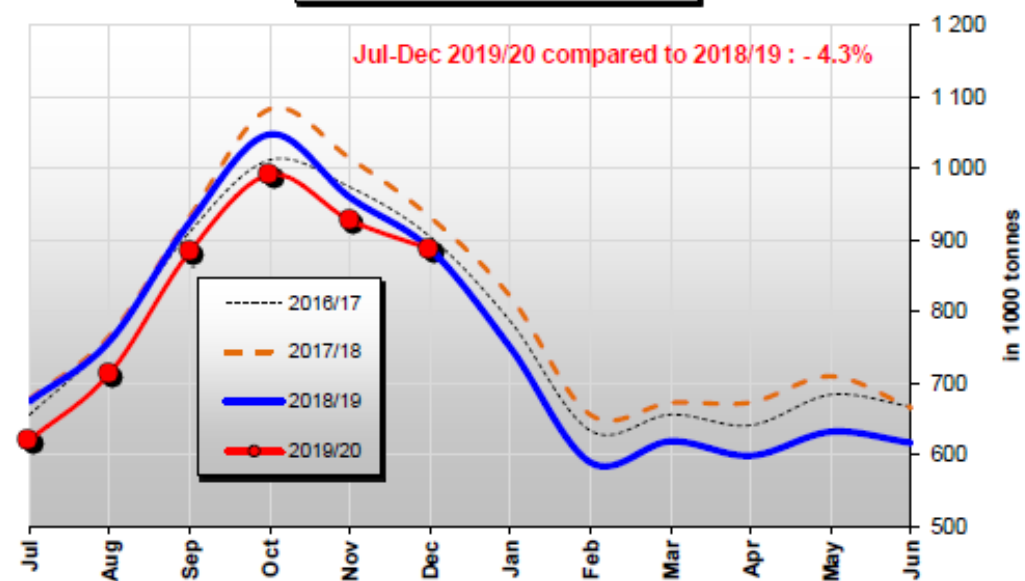


U.S. milk production

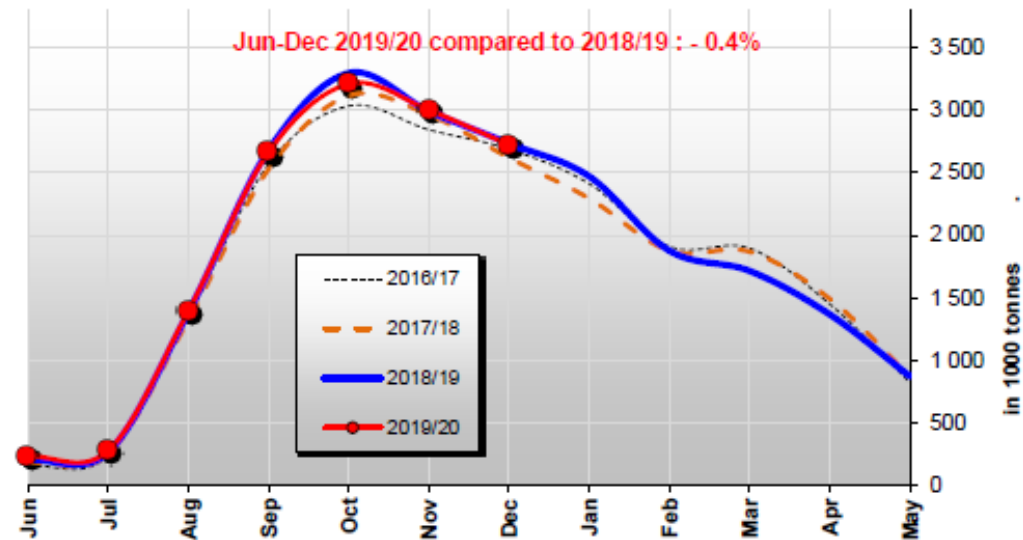


Source:USDA

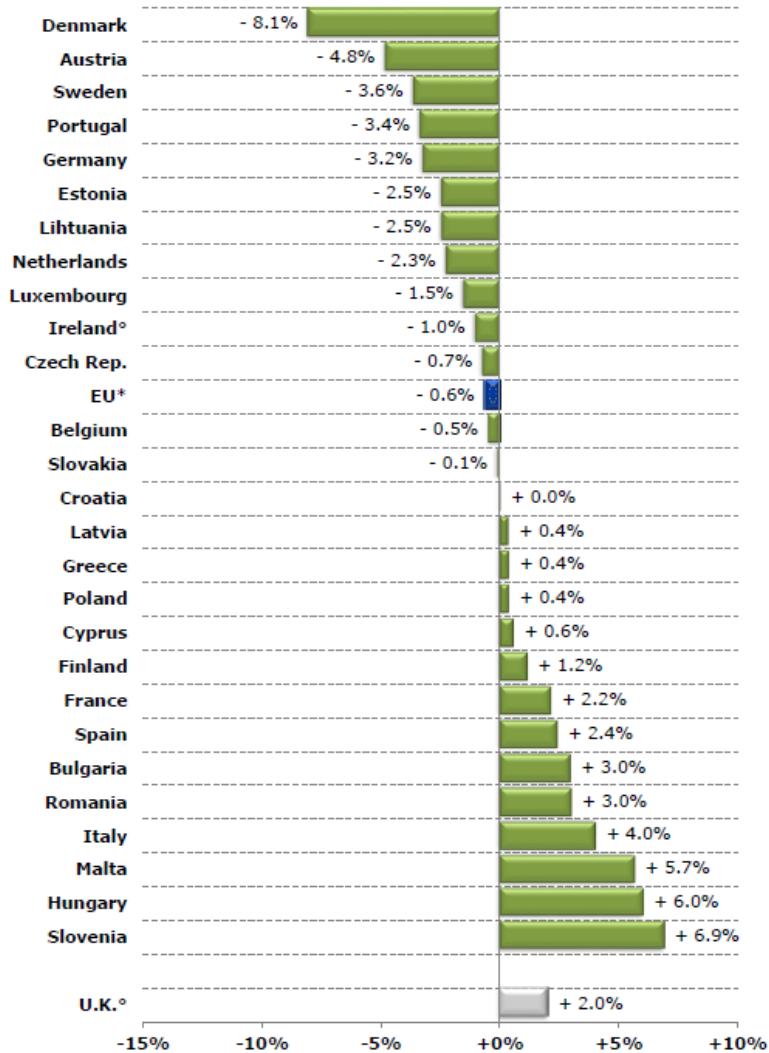
Australian milk production



NZ milk production



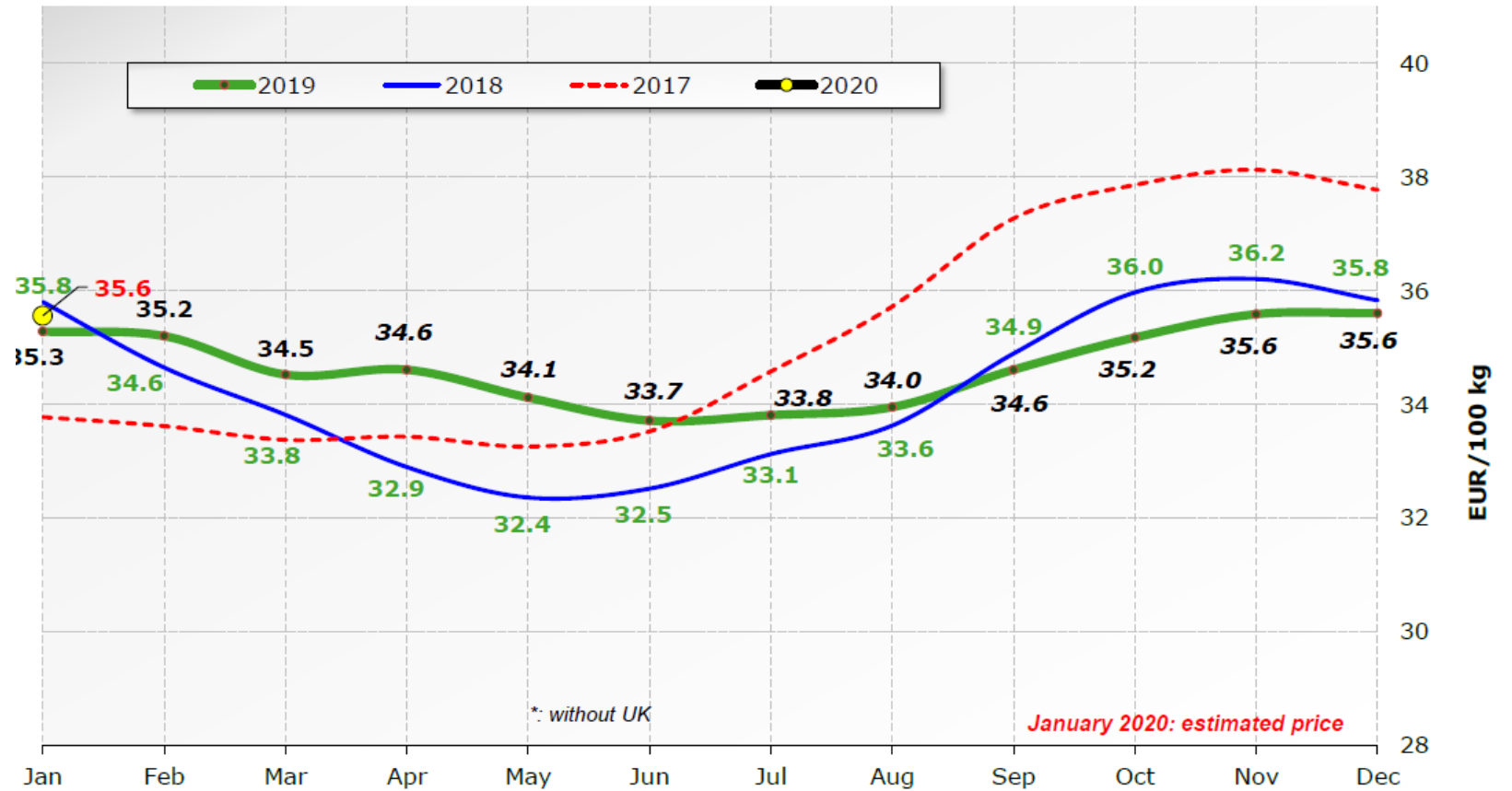
Raw Milk Price evolution in December 2019 compared to December 2018



*: without UK *: estimated figures for Dec 2019

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

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



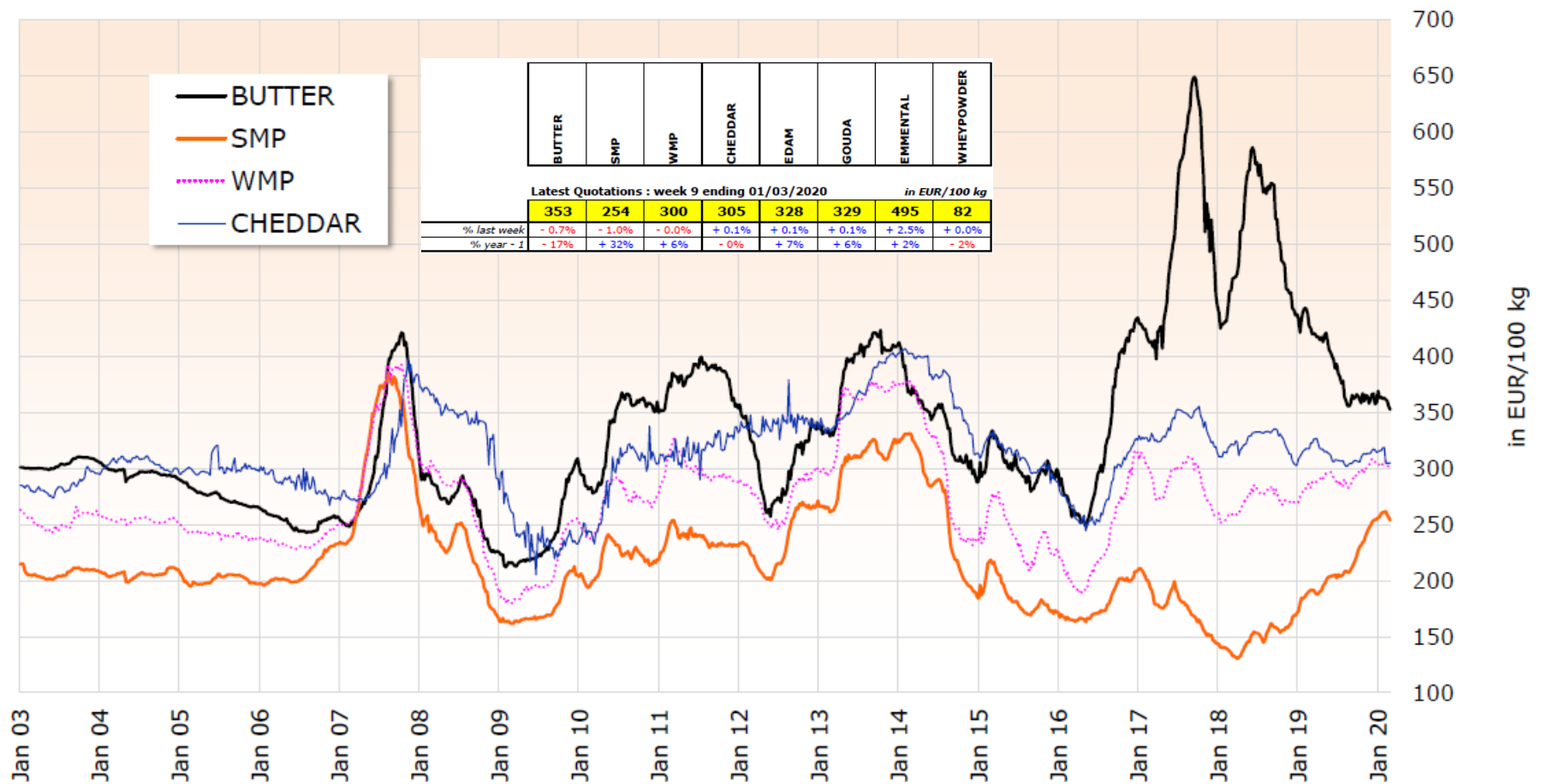
*: without UK

January 2020: estimated price

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

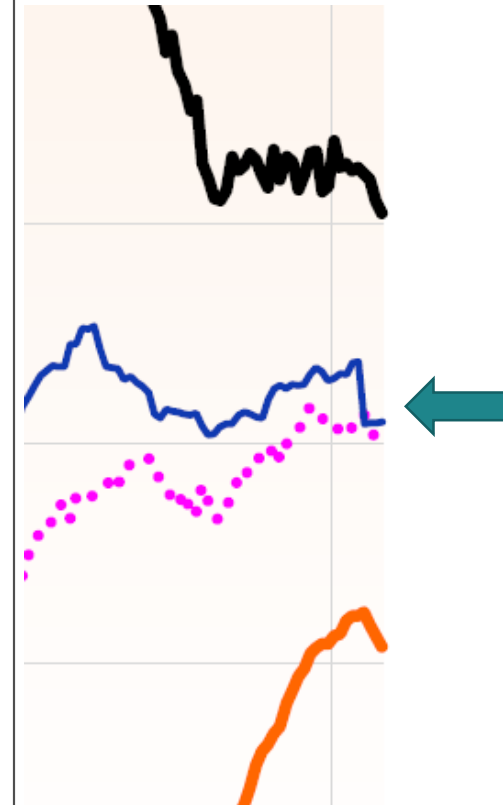
EU evolutive* dairy Quotations

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



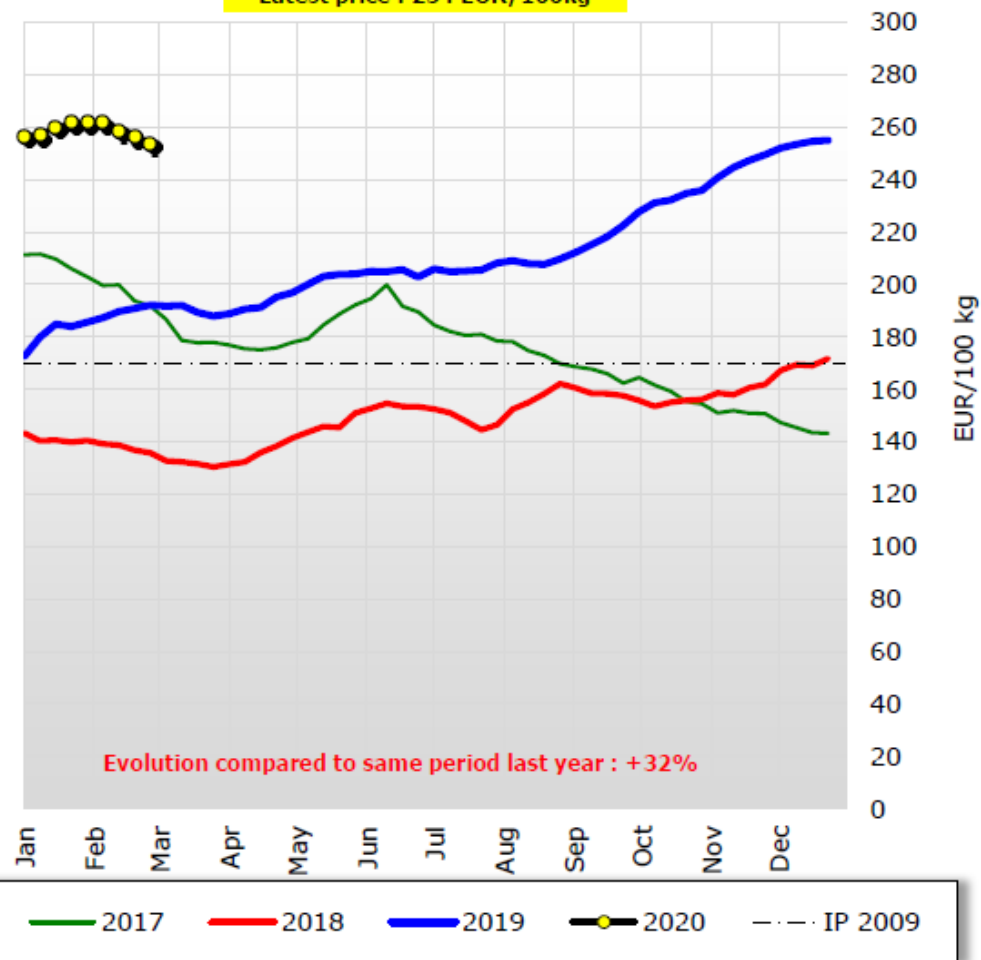
Source: Regulation (EU) No 2017/1185 Article 11 - Annex I.7

* 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)



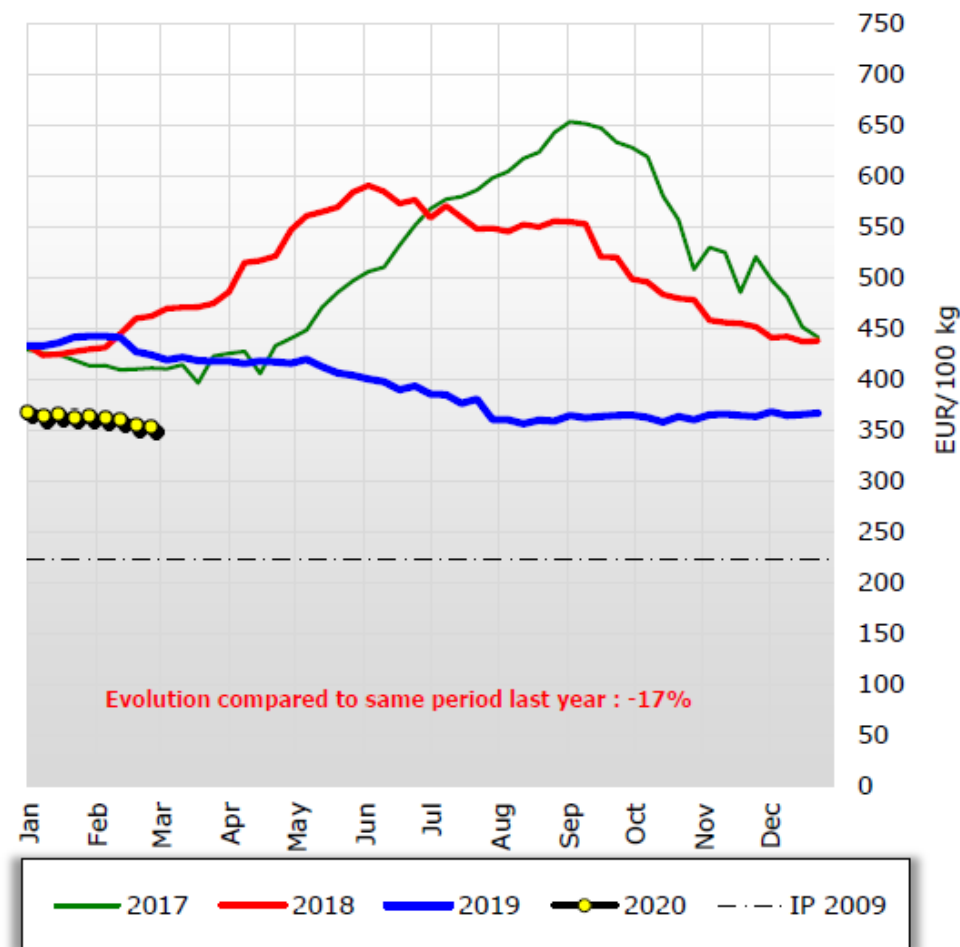
Weekly EU* SMP Prices

Latest price : 254 EUR/100kg



Weekly EU* BUTTER Prices

Latest price : 353 EUR/100kg

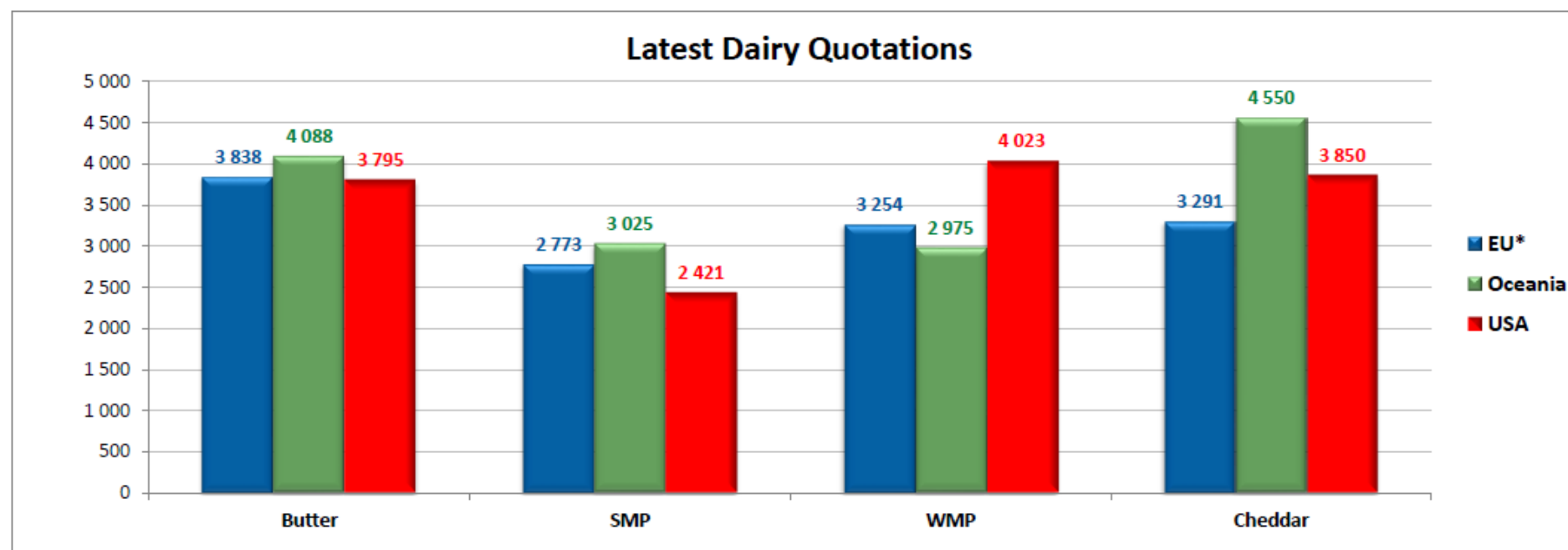


* As of 1 February 2020, the calculated EU average refers to EU (without UK). For comparison purposes, EU (without UK) averages have also been recalculated for the previous years. The weighting coefficients and the list of Member States included in the calculation of the EU averages have also been updated.

Latest World Quotations of Dairy Products

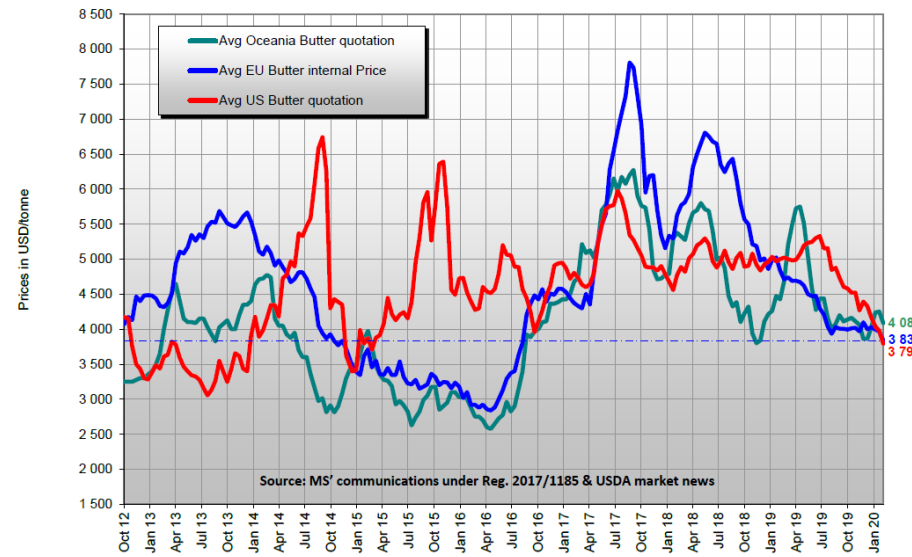
In US\$/t	Latest Quotations			Week - 2						Year - 1					
	01/03/2020			16/02/2020			% change (previous quotation)			03 March 2019			% change (1 year)		
	EU*	Oceania	USA	EU*	Oceania	USA	EU*	Oceania	USA	EU*	Oceania	USA	EU*	Oceania	USA
Butter	3 838	4 088	3 795	3 965	4 250	3 977	↓ -3.2%	↓ -3.8%	↓ -4.6%	4 834	4 425	5 002	↓ -21%	↓ -8%	↓ -24%
SMP	2 773	3 025	2 421	2 872	2 988	2 671	↓ -3.4%	↑ +1.3%	↓ -9.4%	2 161	2 638	2 176	↑ +28%	↑ +15%	↑ +11%
WMP	3 254	2 975	4 023	3 363	3 038	3 968	↓ -3.2%	↓ -2.1%	↑ +1.4%	3 247	3 025	3 560	→ +0%	↓ -2%	↑ +13%
Cheddar	3 291	4 550	3 850	3 340	4 313	4 131	↓ -1.5%	↑ +5.5%	↓ -6.8%	3 478	3 700	3 544	↓ -5%	↑ +23%	↑ +9%

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



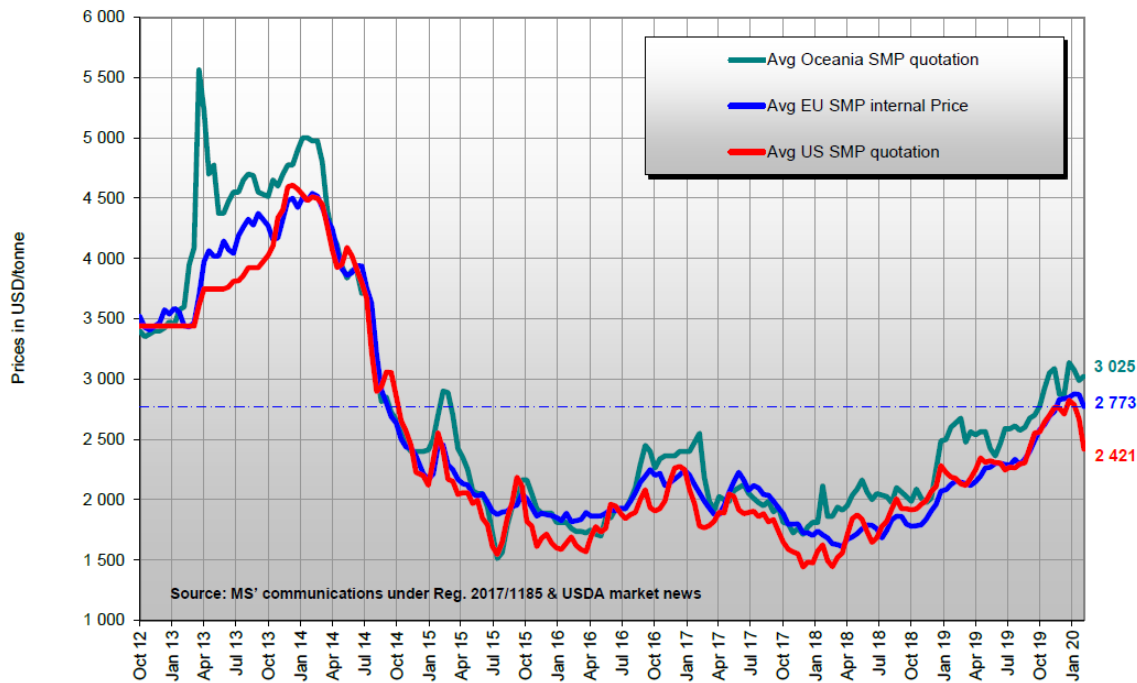
EU* = EU without UK

EU*/US/Oceania Quotations of Butter



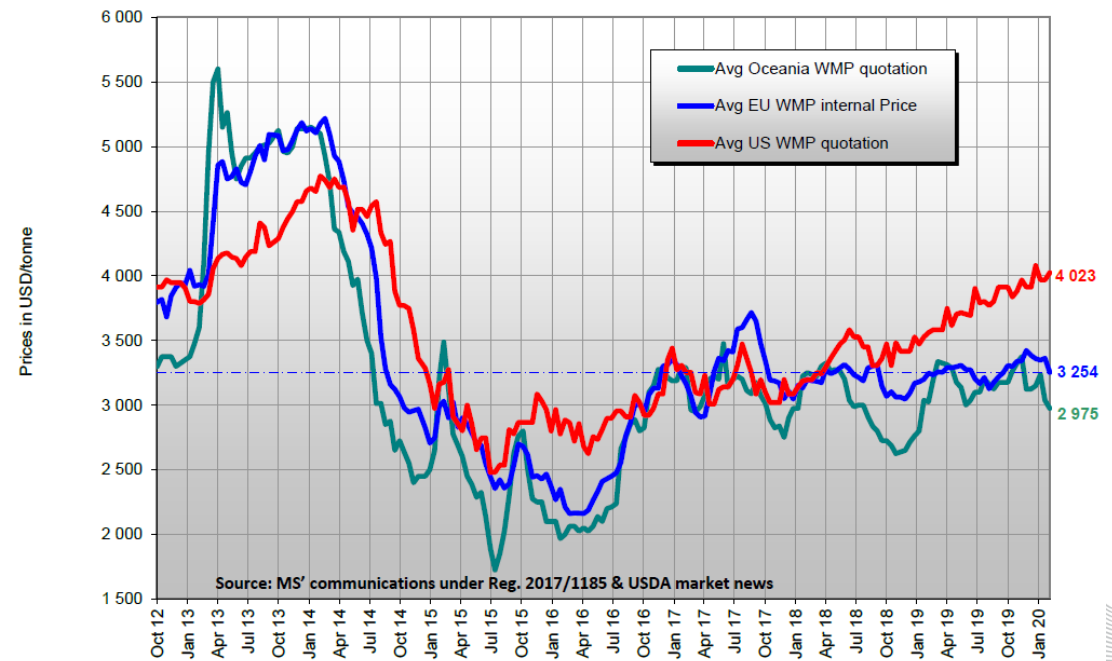
EU*/US/Oceania Quotations of SMP

* EU evolutive



* EU evolutive

EU*/US/Oceania Quotations of WMP



* EU evolutive

Positive exports figures in 2019

+52 263
tons

EU EXPORTS of BUTTER - main destinations				
Period : January-December				
Qty Tons	2017	2018	2019	
Extra-EU	137 181	127 934	180 197 ↑	+ 41%
USA	26 742	27 881	33 860 ↑	+ 21%
U.A.Emirates	4 963	4 313	10 948 ↑	+ 154%
China	8 022	7 860	10 841 ↑	+ 38%
Turkey	3 814	1 672	10 106 ↑	+++
Saudi Arabia	9 949	11 101	9 386 ↓	- 15%
Japan	4 045	6 105	9 035 ↑	+ 48%
Singapore	6 383	7 551	7 058 ↓	- 7%
Morocco	2 782	3 535	6 406 ↑	+ 81%
Egypt	3 138	596	6 222 ↑	+++
South Korea	3 295	3 829	5 658 ↑	+ 48%
Other	64 040	53 401	70 670 ↑	+ 22%

+146 349
tons

EU EXPORTS of SMP - main destinations				
Period : January-December				
Qty Tons	2017	2018	2019	
Extra-EU	779 509	816 010	962 359 ↑	+ 18%
China	71 066	91 780	126 298 ↑	+ 38%
Algeria	132 738	143 264	100 718 ↓	- 30%
Indonesia	58 827	55 860	71 136 ↑	+ 27%
Philippines	44 675	37 190	67 017 ↑	+ 80%
Egypt	41 624	51 230	61 665 ↑	+ 20%
Malaysia	26 942	39 075	49 825 ↑	+ 28%
Nigeria	24 632	27 006	43 985 ↑	+ 63%
Saudi Arabia	32 109	19 687	38 306 ↑	+ 95%
Mexico	39 644	5 368	36 298 ↑	+++
Singapore	20 929	28 574	31 804 ↑	+ 11%
Other	286 323	316 977	335 307 ↑	+ 6%

EU EXPORTS of CHEESES - main destinations				
Period : January-December				
Qty Tons	2017	2018	2019	
Extra-EU	828 315	832 397	879 704 ↑	+ 6%
USA	140 684	133 665	139 101 ↗	+ 4%
Japan	94 786	106 587	114 133 ↑	+ 7%
Switzerland	60 229	61 620	62 542 ↗	+ 1%
South Korea	44 969	37 369	42 307 ↑	+ 13%
Saudi Arabia	40 284	34 636	36 889 ↑	+ 7%
Australia	25 675	25 807	26 326 ↗	+ 2%
Ukraine	9 960	13 957	23 710 ↑	+ 70%
Canada	15 459	20 207	23 303 ↑	+ 15%
Algeria	23 612	22 215	22 325 ↗	+ 0%
China	18 038	17 677	21 620 ↑	+ 22%

+47 307
tons

-36 734
tons

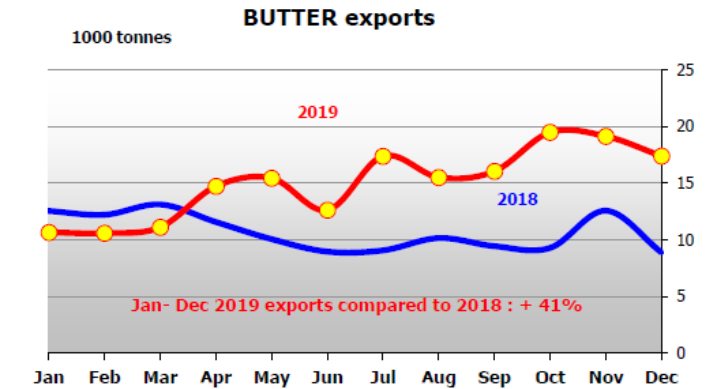
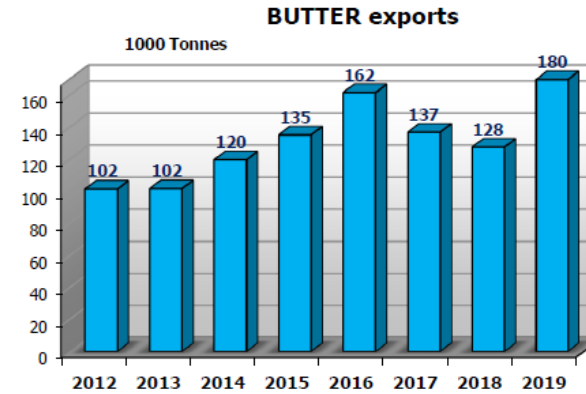
EU EXPORTS of WMP - main destinations				
Period : January-December				
Qty Tons	2017	2018	2019	
Extra-EU	392 915	334 163	297 429 ↓	- 11%
Oman	41 660	48 439	40 531 ↓	- 16%
Algeria	64 355	26 401	21 730 ↓	- 18%
Nigeria	24 380	15 866	18 776 ↑	+ 18%
China	24 036	22 122	17 827 ↓	- 19%
Kuwait	16 197	14 719	16 710 ↑	+ 14%
Lebanon	14 543	13 621	13 675 ↗	+ 0%
Angola	8 693	9 268	10 725 ↑	+ 16%
Dominican R.	12 001	10 344	8 674 ↓	- 16%
Saudi Arabia	11 135	8 680	8 312 ↗	- 4%
Singapore	9 558	11 670	8 222 ↓	- 30%

EU EXPORTS of BUTTER - main destinations

Period: December

Qty Tons	2017	2018	2019	
Extra-EU	10.095	8.893	17.394	↑ + 96%
USA	1.809	1.452	1.847	↑ + 27%
Turkey	598	22	1.781	+++
U.A.Emirates	419	286	1.475	+++
Morocco	146	402	1.127	↑ + 180%
Egypt	300	64	1.119	+++
Saudi Arabia	768	391	1.070	↑ + 174%
Japan	466	1.261	794	↓ - 37%
Israel	163	144	712	+++
China	569	423	704	↑ + 66%
Singapore	788	736	672	↓ - 9%
Other	4.069	3.711	6.094	↑ + 64%

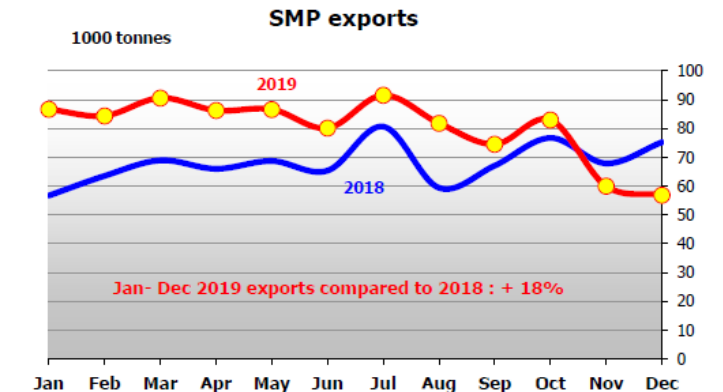
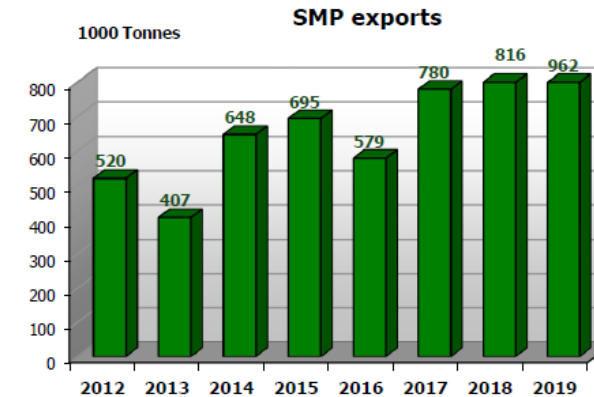
EU-28 Exports



EU EXPORTS of SMP - main destinations

Period: December

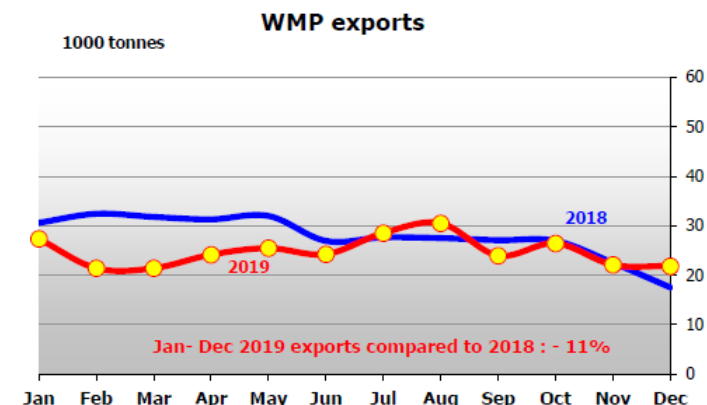
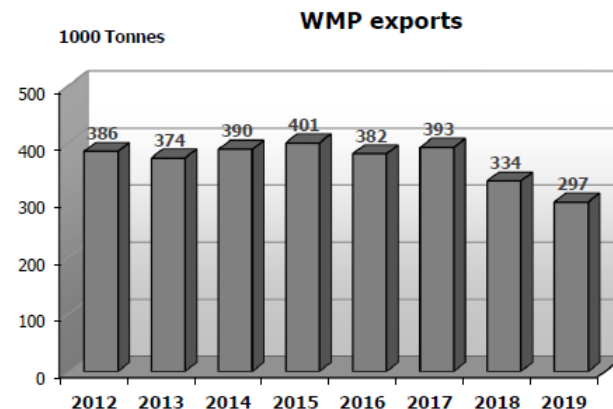
Qty Tons	2017	2018	2019	
Extra-EU	55.838	75.199	56.897	↓ - 24%
Algeria	13.924	10.567	8.667	↓ - 18%
China	2.296	6.559	7.005	↑ + 7%
Nigeria	955	4.611	4.284	↓ - 7%
Saudi Arabia	2.568	2.132	4.232	↑ + 99%
Egypt	6.281	4.949	4.156	↓ - 16%
Malaysia	2.295	5.701	2.454	↓ - 57%
Yemen	987	1.810	2.193	↑ + 21%
Singapore	1.888	2.682	2.022	↓ - 25%
Philippines	1.703	3.992	1.948	↓ - 51%
U.A.Emirates	2.034	729	1.649	↑ + 126%
Other	20.911	31.468	18.287	↓ - 42%



EU EXPORTS of WMP - main destinations

Period: December

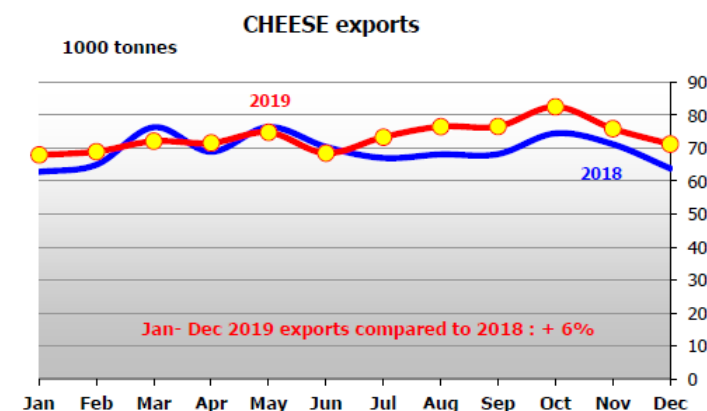
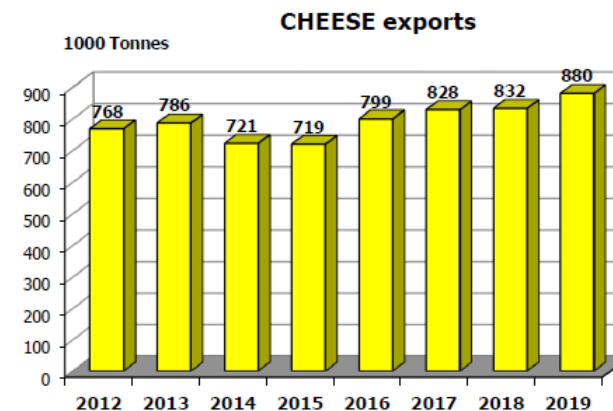
Qty Tons	2017	2018	2019	
Extra-EU	25.879	17.545	21.848	↑ + 25%
Oman	3.667	956	2.390	↑ + 150%
Algeria	1.408	878	2.333	↑ + 166%
Nigeria	1.410	306	2.153	+++
Kuwait	1.927	1.048	1.801	↑ + 72%
Dominican R.	1.089	777	1.251	↑ + 61%
China	1.663	1.163	947	↓ - 19%
Angola	791	274	726	↑ + 165%
Saudi Arabia	538	525	639	↑ + 22%
Lebanon	1.033	947	631	↓ - 33%
Bangladesh	546	234	537	↑ + 129%
Other	11.808	10.436	8.440	↓ - 19%



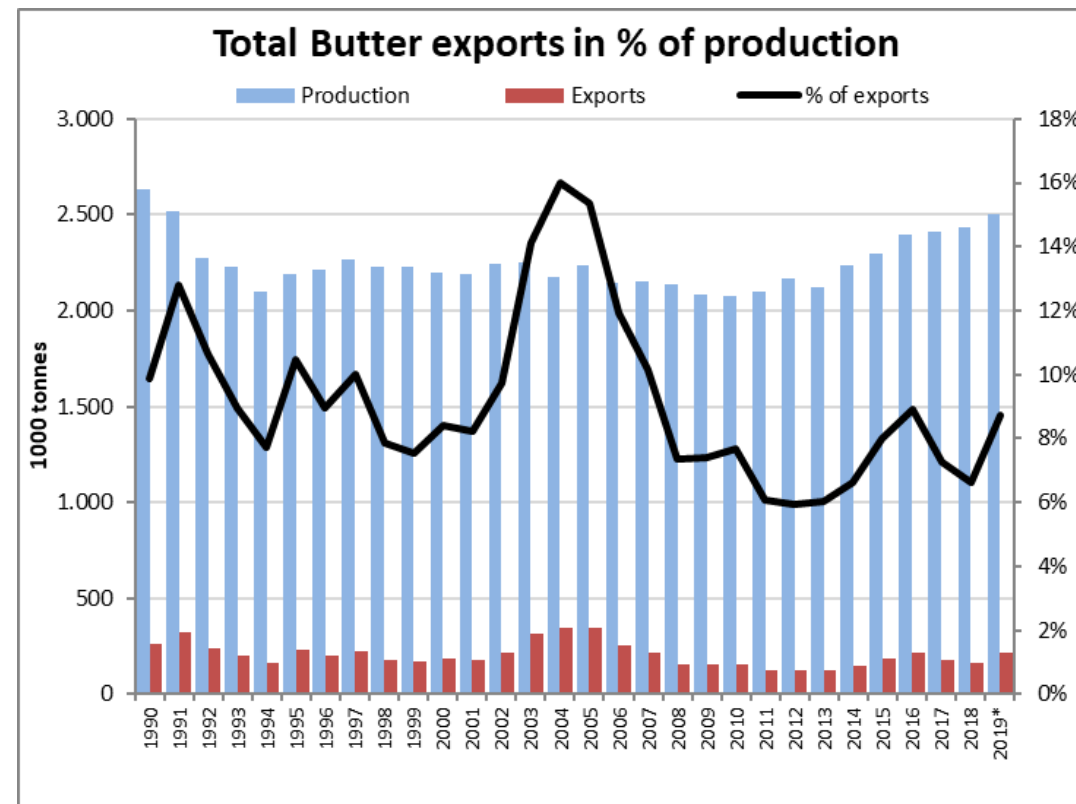
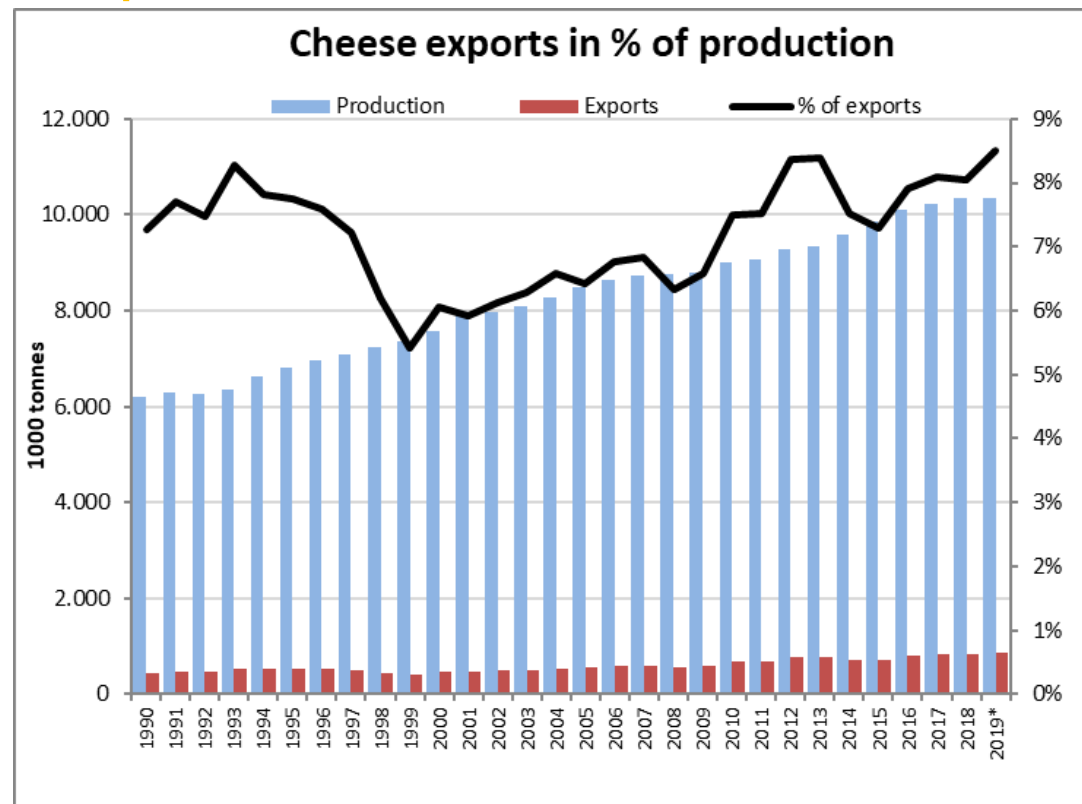
EU EXPORTS of CHEESES - main destinations

Period: December

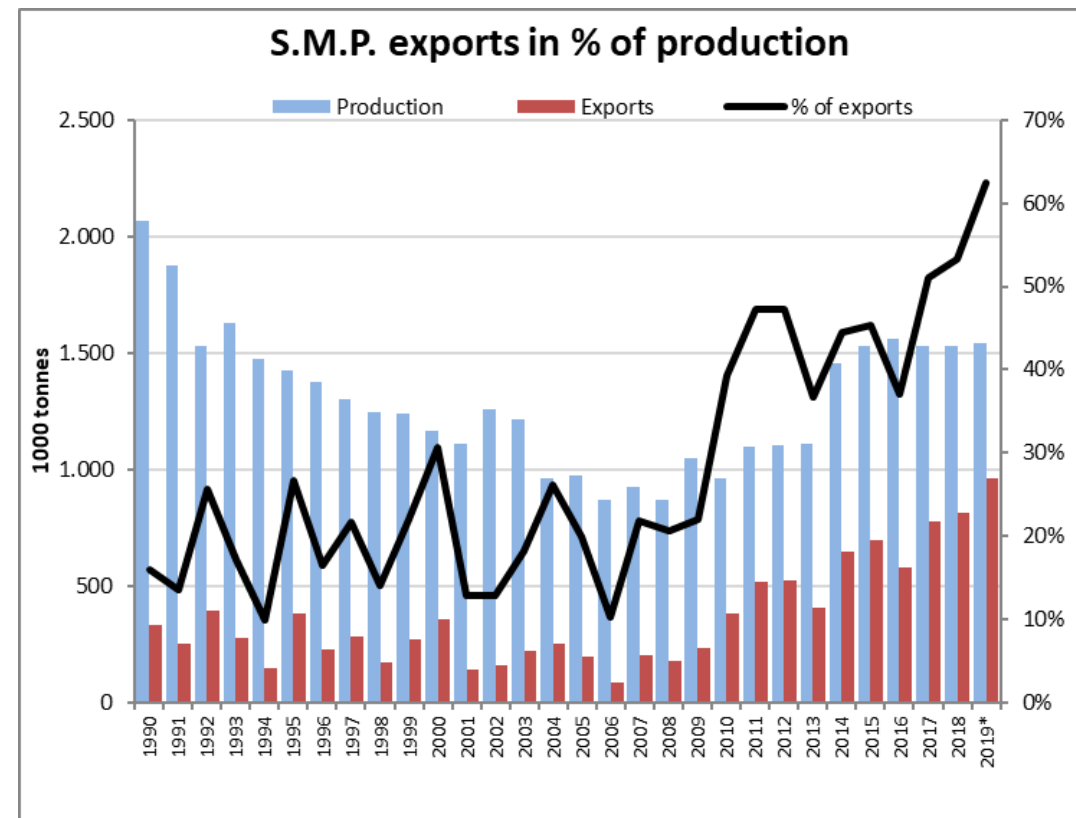
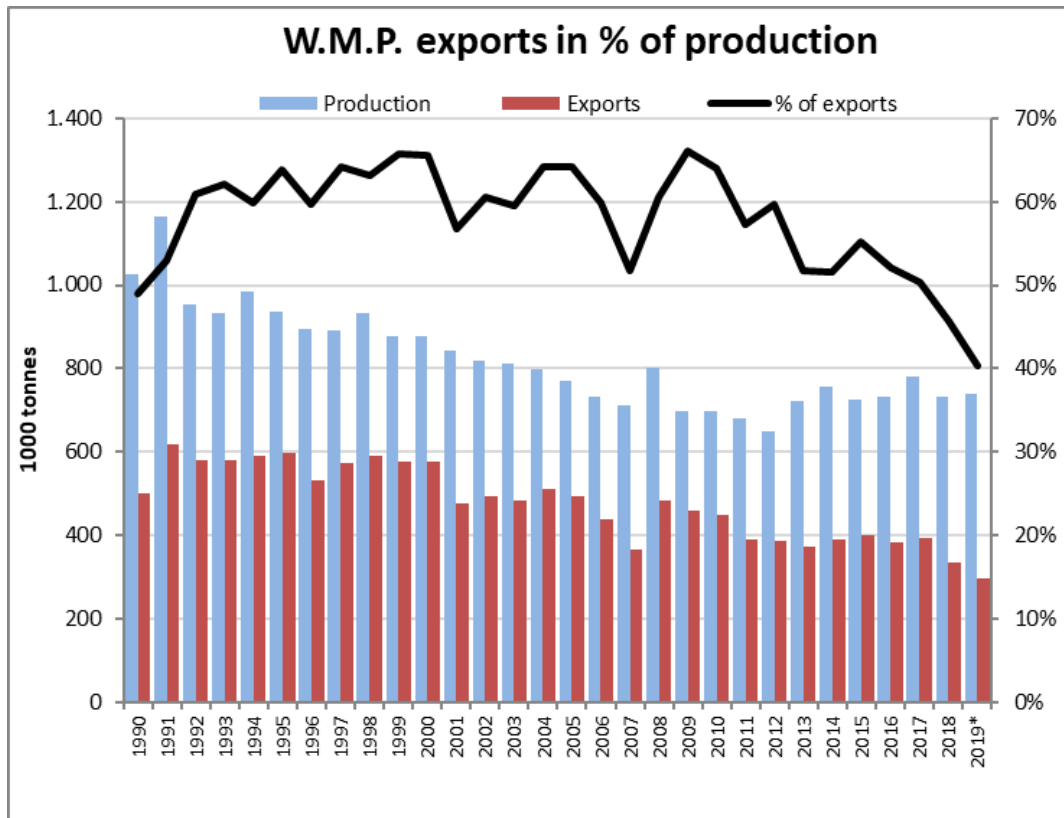
Qty Tons	2017	2018	2019	
Extra-EU	65.483	63.836	71.191	↑ + 12%
Japan	7.776	7.915	9.396	↑ + 19%
USA	9.367	9.710	8.589	↓ - 12%
Switzerland	4.922	4.766	5.068	↑ + 6%
South Korea	2.282	2.333	4.076	↑ + 75%
Saudi Arabia	2.831	2.459	3.136	↑ + 28%
Ukraine	1.087	1.307	2.807	↑ + 115%
Algeria	1.821	2.734	2.094	↓ - 23%
Australia	2.538	2.339	2.026	↓ - 13%
Turkey	826	425	1.895	+++
Egypt	1.079	1.119	1.843	↑ + 65%
Other	30.954	28.729	30.262	↑ + 5%

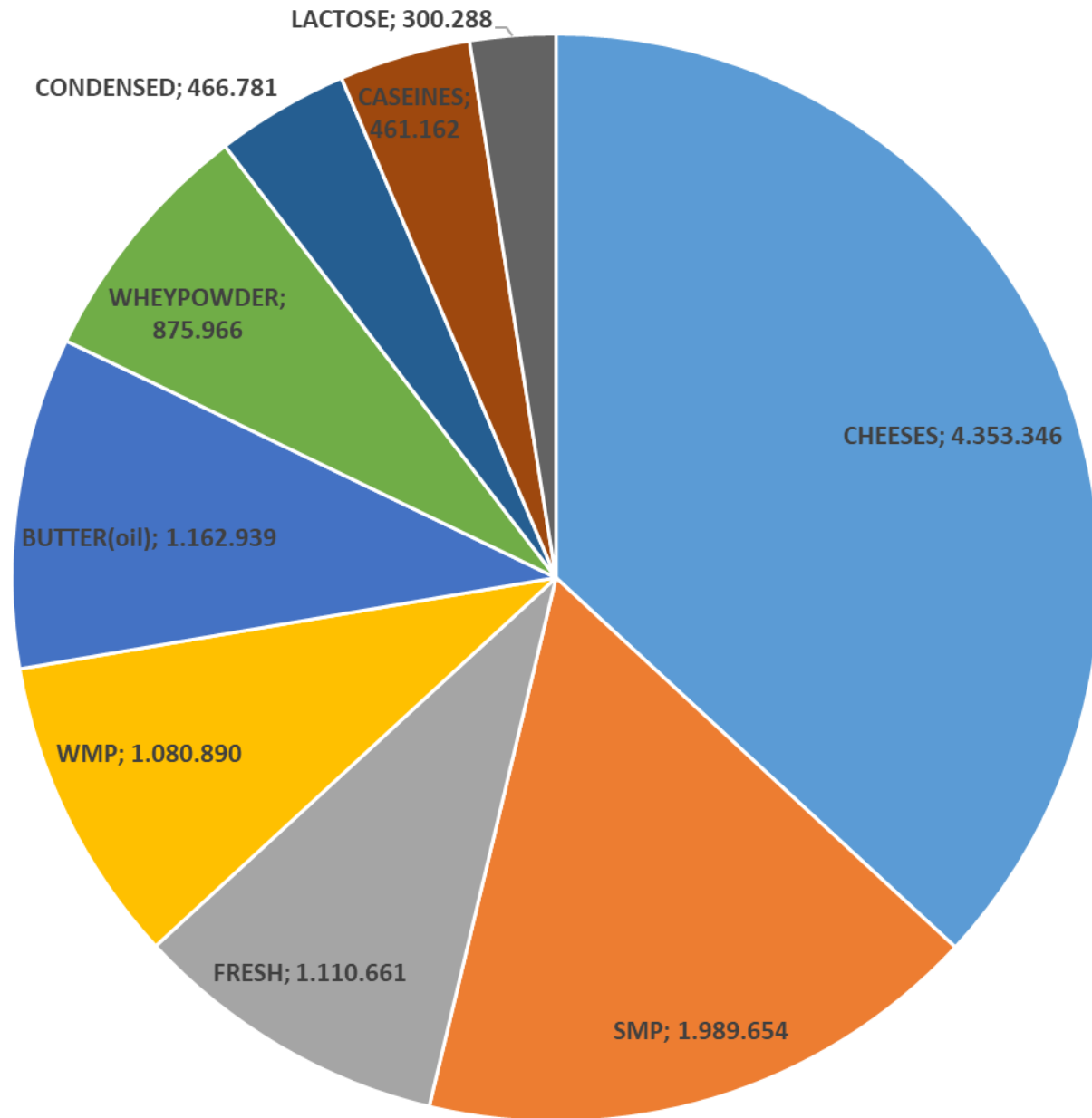


Cheese and butter exports in % of production (1990-2019)



WMP and SMP exports in % of production





EU+UK dairy exports Jan-Dec 2019 (x1000 €)

2.018	2.019	Dif
10 368 247	11 801 687	+14%

TOP 10 Importers (Jan-Dec 2019 compared to Jan-Dec 2018)

Notice: for confidentiality reasons, data for Mexico for 2019 in this dataset may be incomplete.

BUTTER + BUTTEROIL

Source : GTA		Qty in Tonnes		% EU origin		
	2 018	2 019	% 2019/2018	2 018	2 019	
China	113 329	85 590	↓ - 24%	8%	14%	
Russia	76 610	100 786	↑ + 32%	0%	0%	up to Nov
United States	57 452	67 053	↑ + 17%	58%	52%	
Australia	39 848	38 610	↓ - 3%	7%	8%	
Philippines	30 152	34 724	↑ + 15%	5%	5%	up to Nov
Indonesia	21 505	21 755	↑ + 1%	28%	34%	up to Nov
Canada	20 801	23 842	↑ + 15%	1%	5%	
Singapore	20 509	18 889	↓ - 8%	39%	37%	
Taiwan	20 068	20 180	→ + 1%	22%	27%	up to Nov
Japan	15 532	24 512	↑ + 58%	34%	36%	

S.M.P.

Source : GTA		Qty in Tonnes		% EU origin		
	2 018	2 019	% 2019/2018	2 018	2 019	
Mexico	331 498	245 984		1%	0%	up to Nov
China	280 435	343 656	↑ + 23%	30%	36%	
Philippines	144 892	166 284	↑ + 15%	24%	37%	up to Nov
Indonesia	142 069	171 115	↑ + 20%	32%	42%	up to Nov
Malaysia	104 621	103 993	→ - 1%	33%	44%	up to Oct
Algeria	103 976			82%		no data 2019
Russia	86 313	81 619	↓ - 5%	0%	0%	up to Nov
Thailand	66 914	68 337	↑ + 2%	36%	43%	
Singapore	66 355	60 612	↓ - 9%	44%	48%	
Japan	52 073	47 113	↓ - 10%	15%	35%	

W.M.P.

Source : GTA		Qty in Tonnes		% EU origin		
	2 018	2 019	% 2019/2018	2 018	2 019	
China	521 001	671 187	↑ + 29%	3%	2%	
Algeria	150 345			10%		no data 2019
Hong Kong	103 732	96 297	↓ - 7%	57%	48%	
Sri Lanka	87 228	85 435	↓ - 2%	0%	0%	
Brazil	67 645	61 347	↓ - 9%	0%	0%	
Singapore	66 176	68 373	↑ + 3%	20%	18%	
Thailand	59 676	58 903	↓ - 1%	6%	2%	
Indonesia	51 159	48 872	↓ - 4%	16%	7%	up to Nov
Malaysia	48 993	51 967	↑ + 6%	5%	9%	up to Oct
Australia	28 333	37 354	↑ + 32%	16%	10%	

CHEESE

Source : GTA		Qty in Tonnes		% EU origin		
	2 018	2 019	% 2019/2018	2 018	2 019	
Japan	285 700	302 612	↑ + 6%	35%	36%	
Russia	227 388	249 324	↑ + 10%	0%	0%	up to Nov
United States	175 851	180 593	↑ + 3%	72%	72%	
South Korea	123 850	131 354	↑ + 6%	31%	31%	
Mexico	111 825	55 997		12%	1%	up to Nov
China	108 278	114 862	↑ + 6%	16%	17%	
Australia	98 288	96 824	↓ - 1%	24%	25%	
Switzerland	62 368	64 129	↑ + 3%	98%	98%	
EU-28	59 153	63 004	↑ + 7%			
Chile	51 556	43 612	↓ - 15%	35%	29%	

TOP 10 Exporters

(Jan-Dec 2019 compared to Jan-Dec 2018)

Notice: for confidentiality reasons, data for Mexico for 2019 in this dataset may be incomplete.

BUTTER + BUTTEROIL

Source : GTA

Qty in Tonnes

	2 018	2 019		
New Zealand	453 144	461 433	↑	+ 2%
EU-28	161 711	218 134	↑	+ 35%
Belarus	66 578	57 144	↓	- 14% up to Oct
United States	51 339	32 366	↓	- 37%
Ukraine	26 938	15 155	↓	- 44% up to Nov
India	21 654	39 678	↑	+ 83% up to Oct
Australia	15 618	16 886	↑	+ 8%
Uruguay	13 070	13 525	↑	+ 3%
Malaysia	6 348	4 605	↓	- 27% up to Oct
Argentina	3 854	8 226	↑	+ 113%

W.M.P.

Source : GTA

Qty in Tonnes

	2 018	2 019		
New Zealand	1 369 041	1 539 211	↑	+ 12%
EU-28	334 163	297 429	↓	- 11%
Uruguay	142 934	131 785	↓	- 8%
Argentina	118 250	85 329	↓	- 28%
Australia	54 918	42 129	↓	- 23%
United States	48 320	39 396	↓	- 18%
Hong Kong	46 973	46 005	↓	- 2%
Singapore	44 847	49 097	↑	+ 9%
Malaysia	33 840	41 889	↑	+ 24% up to Oct
Belarus	29 720	19 510	↓	- 34% up to Oct

S.M.P.

Source : GTA

Qty in Tonnes

	2 018	2 019		
EU-28	816 010	962 359	↑	+ 18%
United States	714 984	704 441	↓	- 1%
New Zealand	358 212	373 503	↑	+ 4%
Australia	155 034	127 660	↓	- 18%
Mexico	103 998			up to Nov
Belarus	91 044	103 758	↑	+ 14% up to Oct
Canada	65 856	46 674	↓	- 29%
Turkey	24 970	39 745	↑	+ 59%
Ukraine	22 993	18 996	↓	- 17% up to Nov
Uruguay	15 567	21 603	↑	+ 39%

CHEESE

Source : GTA

Qty in Tonnes

	2 018	2 019		
EU-28	832 397	879 704	↑	+ 6%
United States	350 333	362 529	↑	+ 3%
New Zealand	321 898	335 135	↑	+ 4%
Australia	172 012	160 291	↓	- 7%
Belarus	171 265	198 124	↑	+ 16% up to Oct
Switzerland	68 359	71 291	↑	+ 4%
Turkey	50 669	50 035	↓	- 1%
Egypt	48 980			no data 2019
Argentina	42 727	39 405	↓	- 8%
Uruguay	28 527	25 614	↓	- 10%



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Keep in touch and thank you!



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