



## European Dairy Market Overview

Agricultural Marketing Service  
Dairy Market News

Report 19

May 9, 2024

MMN Slug ID 1033 / Slug Name: MD\_DA100

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**WESTERN EUROPEAN OVERVIEW:** Western European milk production is nearing the seasonal peak. In some cases, weekly milk volumes have plateaued, signaling the top of the milk production curve is at hand. As European milk handlers begin to consider what volumes may look like for the next few months, they are working to assure their farmer patrons stay committed to sending milk their way. Last week, a large European dairy cooperative announced the guaranteed price for May will increase by 0.50 euros to 47.25 euros per 100kg. The average March milk pay price across the EU was 46.4 euros per 100 kg, and the preliminary April pay price is estimated at 46.3 euros per 100kg. Spot farm milk prices have largely stayed close to the low/mid 40 euros per 100kg. Although slightly below the monthly average pay price, they have increased slightly in the last week.

Last week, Great Britain began physical checks on fresh food products, including meat, cheese, and some other dairy products, imported from the European Union that are deemed as medium biosecurity risks to Great Britain's agricultural sector. Smaller food importers are concerned that the new inspections will cause significant delays, reduce the variety of food products, and increase prices. The UK government estimates the inspection requirements will increase costs for the food industry by \$413 million per year and increase food inflation by 0.2% over three years.

A leading food and beverage research and development company recently released a report detailing consumer trends and strategies for dairy in response to the global food inflation. Although the dairy category has been impacted greatly by inflation, the industry can emphasize quality and added value to secure market share and reach consumers. According to the report, consumers identified five key trends that will drive market changes and product innovation. These include: matching products to consumer health preferences; providing products that maintain quality over costs; offering private label options that do not compromise quality; matching product attributes to consumer values like sustainability and authenticity; and providing for indulgence and/or convenience.

**EASTERN EUROPEAN OVERVIEW:** Eastern European milk production continues to increase seasonally. Through the month of March, the Baltic States, Czech Republic, Slovakia, Hungary, Romania, and Poland, have all posted increases in milk production compared to the first three months of 2023. Although average monthly milk pay prices in most Eastern European counties are largely below those of their western counterparts, milk pay prices in Poland, the leading Eastern EU dairy producing country, have averaged approximately 47.7 euros per 100kg, compared to approximately 46.4 euros per 100kg, the average milk pay price for the EU27 for the first three months of the year.

Information for the period April 29 - May 10, 2024, issued biweekly

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Published by:

Dairy Market News - Madison, WI  
MIKE BANDLI, (608)422-8592  
Email: [mike.bandli@usda.gov](mailto:mike.bandli@usda.gov)

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Dairy Market News (DMN) by Phone: (608)422-8587  
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