



## European Dairy Market Overview

Agricultural Marketing Service  
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**WESTERN EUROPEAN OVERVIEW:** After a slow start to the year, EU milk production has picked up, and weekly milk intakes are above 2023 levels within some countries. According to some European publications, week 13 milk collections in Germany were 0.7 percent above those of week 13 in 2023, and milk collections in France were 1.3 percent higher for the same period.

Milk pay prices have been relatively stable through the course of the first three months of 2024. The average EU farm gate milk pay price has been close to the mid 40 euros per 100kg since the beginning of the year. Spot milk prices have been at, or slightly lower than, the current milk pay prices. Industry sources suggest that milk is readily available for processing needs. Cream prices are trending higher ahead of strong demand for butter and fresh cream and milk products. Skimmed milk concentrate prices are slightly weaker due to lackluster demand for milk powders and greater than anticipated milk supplies.

**EASTERN EUROPEAN OVERVIEW:** The march to spring flush is continuing across much of Eastern Europe. However, while milk production is still growing in some Eastern European countries, Ukrainian milk production is still well below the levels of milk produced in the country prior to the Russian invasion. Online information services report February 2024 Ukrainian milk production was 460,000 tons, compared to 525,000 tons in February 2021. February 2023 Ukrainian milk production was 458,000 tons.

On March 28, negotiators from across the EU reached a tentative agreement to extend the tariff-free food import status for Ukrainian goods to June 2025 and impose tariffs on poultry, eggs, sugar, oats, maize/corn, groats, and honey if imports exceed the average levels of a reference period for those products. The new agreement expands the reference period used by the EU to include the last half of 2021, as well as 2022 and 2023. The agreement now needs to be ratified by the European Parliament. Market observers expect some countries may seek to add more restrictions. France and Hungary have indicated that wheat should also be included with the products that have the tariff triggers. The agreement is important to both sides and tries to strike a balance between protecting EU agricultural markets and supporting the Ukrainian economy amid the war with Russia.

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MIKE BANDLI, (608)422-8592

Email: [mike.bandli@usda.gov](mailto:mike.bandli@usda.gov)

Additional Dairy Market News Information:

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