European Dairy Market Overview

Agricultural Marketing Service
Dairy Market News

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WEST EUROPE OVERVIEW: As expected, seasonal milk declines are taking place across West Europe. Warmer temperatures and some storms have cut into milk output. That said, milk production levels are generally above that of last year. According to CLAL data made available to USDA, May 2024 EU cows' milk delivered to dairies is estimated at 13,496,000 MT, up 0.6 percent compared to last year. Year-to-date EU cows' milk delivered to dairies through May 2024 is estimated at 62,784,000 MT, up 1.0 percent when compared to January-May 2023 EU milk production. Among some of the top West EU milk producers, the year-to-date milk deliveries and percentage changes from January-May 2023 are Germany, 13,867,000 MT, +0.3 percent; France, 10,446,000 MT, +1.1 percent; and Netherlands, 5,897,000 MT, - 1.3 percent.

Poor weather resulted in a weak start to the milk production season in Ireland and the United Kingdom. Milk volumes during the normal peak of spring flush were below those of last year. According to CLAL data made available to USDA, the provisional May 2024 cows' milk delivered to dairies in the UK was 1,421,300 MT, down 0.7 percent from May 2023. Year-to-date cows' milk deliveries in the UK for January-May 2024, 6,638,500 MT, was only slightly lower compared to total milk deliveries in January-May 2023. However, those numbers are annualized against a weak 2023/24 production year. More recently, improvements in weather and grass growth rates have helped bolster milk output. First cuttings of hay are thought to be at good levels, and depending on future weather patterns, hay harvest and milk output should match more closely to typical output levels.

EAST EUROPE OVERVIEW: Milk production across East Europe continues to show strong output growth. According to CLAL data made available to USDA, some of the top East EU milk producers, the year-to-date milk deliveries and percentage changes from January-May 2023 are Poland, 5,802,000 MT, +5.6 percent; Czech Republic, 1,408,000 MT, +3.7 percent; and Hungary, 754,000 MT, +5.6 percent. The provisional May 2024 cows' milk production in Belarus was 783,000 MT, up 6.1 percent from May 2023. January - May 2024 provisional milk production in Belarus, 3,648,000 MT, is up 7.8 percent from January - May 2023. Online information services report May 2024 Ukrainian milk production was 732,000 tons, compared to 751,000 tons in May 2023. The average May milk price in Ukraine was approximately 30.8 euros per 100kg, compared to the average May milk price of 45.90 euros per 100 kg in the EU-27 and 46.34 euros per 100 kg in Poland.

The European Commission reports the Combined Drought Indicator (CDI) for late June 2024 signals warning drought conditions for parts of East Europe, including Poland, the Balkans, and parts of Romania and the Baltic States. Warning conditions suggest that drought conditions exist that are negatively affecting crops and vegetation.

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