



## European Dairy Market Overview

Agricultural Marketing Service  
Dairy Market News

Report 9

February 29, 2024

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**WESTERN EUROPEAN OVERVIEW:** Seasonal weekly milk production in Western Europe continues to increase, but it is still below levels of the previous year. Industry contacts say they expect the 2024 milk production season to begin well. Sufficient precipitation early in the year has improved soil moisture levels, and farmers expect there will be plenty of forages for spring milk production. However, farm milk supplies are snug compared to processing capacities. As a result, manufacturers are increasing milk pay prices. One large milk cooperative in the EU recently announced a guaranteed farm milk pay price of 46.50 euros per 100 kilograms, up 0.50 euros from last month.

The EU ended 2023 with little change in total annual milk production from the previous year. According to CLAL data made available to USDA, December 2023 EU cows' milk delivered to dairies is estimated at 11,422,000 MT, down 0.7 percent compared to last year. Year-to-date EU cows' milk delivered to dairies through December 2023 is estimated at 144,676,000 MT, unchanged when compared to January-December 2022 EU milk production. Among some of the top Western EU milk producers, the year-to-date milk deliveries and percentage changes from January-December 2022 are Germany, 32,423,000 MT, +1.5 percent; France, 23,415,000 MT, -2.7 percent; and Netherlands, 13,901,000 MT, +1.0 percent.

Farmer protests have tangled transportation and other activities in various regions of the EU over the last month. While the intensity of the protests has ebbed and flowed in different locations and at different times, the fury of the farmers was again stoked at a large agricultural fair in Paris last weekend. Angry farmers disrupted the fair, calling for government intervention to ease the increased economic and regulatory pressures. Farmers in Denmark are concerned that a proposed carbon emissions tax on farming could close farms and further reduce agricultural production and productivity. If enacted, Denmark would be the first country in the world to impose such a tax on farming.

The Farm Council of national agricultural ministers from across the EU met on Monday in Brussels. In the meeting, the officials set forth a simplification package, initiatives to try to ease governmental regulation and provide greater support for farmers. Additionally, participants requested that standards be balanced for imported agricultural goods and domestically produced products, and that while the emission reductions targets should be maintained, there should also be special considerations for the agricultural and food sectors.

Representatives of several large consumer goods companies reported they plan to slow price increases through 2024. While they expect prices to still rise due to higher labor and shipping costs, the rate of inflation on consumer goods would be slower.

**EASTERN EUROPEAN OVERVIEW:** Milk production in Eastern Europe has continued to grow strongly. According to CLAL data made available to USDA, some of the top Eastern EU milk producers, the year-to-date milk deliveries and percentage changes from January-December 2022 are Poland, 12,976,000 MT, +1.6 percent; Czech Republic, 3,223,000 MT, +1.6 percent; and Hungary, 1,644,000 MT, -3.3 percent. The provisional December 2023 cows' milk production in Belarus was 695,000 MT, up 7.5 percent from December 2022. January - December 2023 milk production in Belarus, 8,331,000 MT, is up 5.9 percent from January - December 2022.

Czech and Slovak farmers have initiated protests and border blockages like their counterparts in Poland and Hungary, demanding fewer regulatory hurdles and improved protections from imported agricultural products. While supportive of the European Union and the aid provided to war-torn Ukraine, farmers are voicing their anger over what they see as unfair competition from imported goods that do not have to meet the same regulatory standards, especially Ukrainian goods that are imported without duties. Government officials from Poland and Ukraine plan to meet March 28th in Warsaw to discuss a variety of issues, however, immediate discussion of the border blockages by Polish farmers is not included.

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A large dairy industry organization is calling on the Ukrainian parliament to provide additional financial support for the nation's dairy processors. Reduced cow numbers and lost productivity have decreased the nation's milk supply significantly. As a result, many of the country's dairy processors are running at 50 to 60 percent capacity, increasing their production costs and increasing the prices for consumer goods.

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