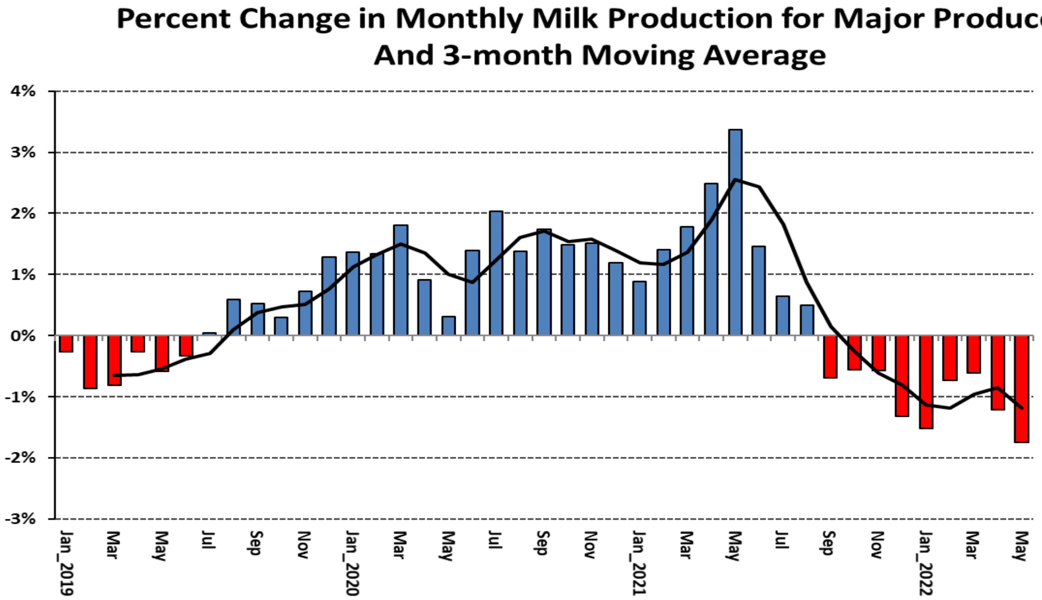
USDA
United States
Department of
Agriculture

Foreign
Agricultural
Service

Jul 2022

# Dairy: World Markets and Trade

## Dairy Production and Trade Developments




Note: --Includes, Argentina, Australia, EU, New Zealand, U.S.
--Adjusted for Leap Year 2020

Since the end of 2021, global milk supplies have tightened, propelling prices for manufactured dairy commodities higher. Among the major dairy exporting countries through May, only Argentina has seen milk output grow year-over-year (+1 percent) while Australia (-6 percent), the European Union (-1 percent), New Zealand (-6 percent), and United States (-1 percent) have all seen supplies come under pressure. Going forward, global supplies will likely remain tight as hot, dry conditions in the European Union (E.U.) increase cow discomfort and weigh on output per cow. Furthermore, diminishing producer profitability in Argentina will likely cause production growth to moderate. Tightening supplies in the E.U. and Argentina are expected to more than offset improving production in New Zealand, where pasture conditions have improved considerably since the start of 2022 and the short-term climactic outlook is positive. Similarly in Australia, favorable conditions and strong prices are expected improve production from the current year to date; however, producer caution is expected to keep expansion at a minimum in the short term and keep annual milk production totals lower than 2021. Meanwhile, relatively stable cow inventories and slowly recovering growth in milk per cow are expected to cause U.S. milk production to turn positive in the second half of the year, mostly offsetting earlier weakness.

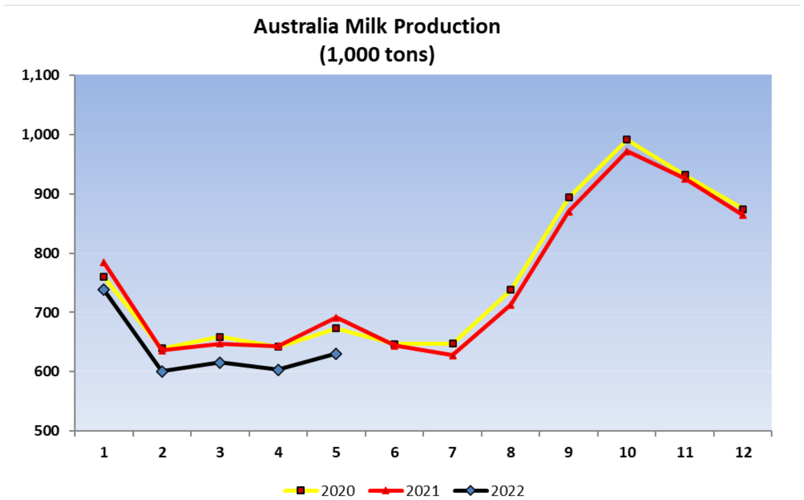
## Fluid Milk:

**Milk Production Summary for Major Exporters**
(Million Tons)

| | 2020 | 2021 | 2022 Forecast | 2021-2022 Change |
|---|---|---|---|---|
| **Argentina** | 11.4 | 11.9 | 12.0 | **1%** |
| **Australia** | 9.1 | 9.0 | 8.7 | **-3%** |
| **EU-27** | 145.4 | 145.0 | 142.3 | **-2%** |
| **New Zealand** | 22.0 | 22.0 | 21.9 | **-1%** |
| **United States** | 101.3 | 102.6 | 102.5 | **0%** |
| **Major Exporter Total** | 289.2 | 290.5 | 287.4 | **-1%** |

Note: Data is rounded.

- In **Australia**, milk production in 2022 has been revised down 4 percent from the prior forecast to 8.73 million tons and is now expected to contract 3 percent year-over-year. Expectations for 2022 milk production are being negatively impacted as dairy farmers continue to exit the business. Higher property prices are reportedly spurring some dairy farmers to exit the business altogether while others are enticed into raising beef cattle by high prices in that sector and lower labor intensity. These exits have driven milk cow numbers lower; the difficulty of finding labor has been weighing on milk yields. These factors more than offset strong milk prices and good feed and water availability. The National Dairy Farmer Survey conducted by Dairy Australia indicates that producers are more inclined to invest recent profits in on-farm improvements instead of expansion, at least in the short term.[1]

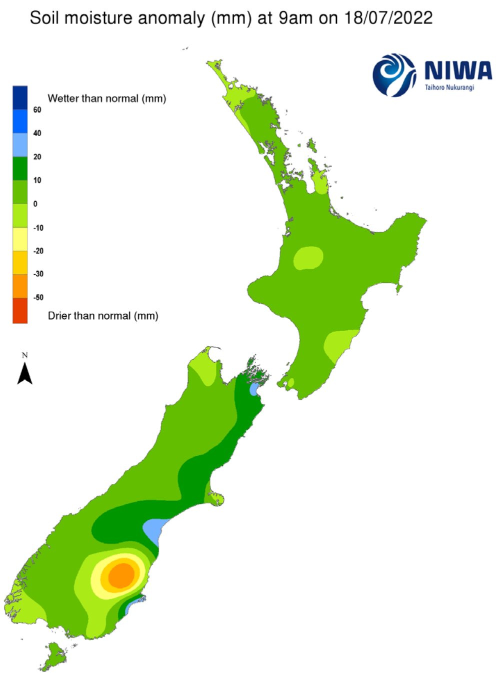



- The milk production forecast for 2022 in the **European Union** has been revised down 3 percent from the prior forecast and production is now expected to contract 2 percent year-over-year. This will mark the second consecutive year of lower milk production as cow numbers continue to decline. Increased environmental and animal welfare

1 https://www.dairyaustralia.com.au/industry-statistics/industry-reports/situation-and-outlook-report#.YrsaV3bMKzU

regulations set to take effect over the next several years have tempered producer enthusiasm for expansion. Additionally, rising input costs have squeezed producer margins despite strong raw milk prices and current hot, dry conditions are expected to negatively impact forage quality and weigh on milk yields.

- **New Zealand** milk production was tight to start 2022, declining nearly 6 percent year-over-year through May as dryness negatively impacted important production regions including Waikato and Southland. However, soil moisture has improved considerably over the past 2 months and the outlook through September[2] suggests rainfall will continue to be normal to above normal, which should support some recovery in output per cow as the year progresses. Additionally, the farmgate milk price paid by Fonterra continues to be strong, with the price for the remainder of calendar year 2022 and the beginning of 2023 forecast at NZ$8.78 to NZ$10.25 per kilogram milk solids. For 2022, New Zealand milk production will be marginally below 2021 at 21.9 million tons. However, despite some supportive factors, milk production has been constrained as cow numbers have been declining. Furthermore, tight labor conditions in New Zealand have resulted in a shortage of workers in the dairy industry, which may have been dampening milk yields and production. Despite the Government of New Zealand allowing additional migrant workers to enter the country, the industry still believes more should be granted entry to alleviate staff shortages. There is also pressure on production from high input prices – particularly fertilizer and supplemental feed. Margins will therefore be slimmer than high farmgate milk prices might suggest.




2 https://niwa.co.nz/climate/seasonal-climate-outlook

## CHEESE:

**Cheese Exports Summary for Major Exporters**
**(1,000 Tons)**

| | 2020 | 2021 | 2022 Forecast | 2021-2022 Change |
|---|---|---|---|---|
| **Australia** | 153 | 157 | 159 | **1%** |
| **Belarus** | 275 | 298 | 310 | **4%** |
| **EU-27** | 1,402 | 1,385 | 1,400 | **1%** |
| **New Zealand** | 327 | 358 | 340 | **-5%** |
| **United States** | 355 | 402 | 433 | **8%** |
| **Major Exporter Total** | **2,512** | **2,600** | **2,642** | **2%** |

Note: Data is rounded.

- **Australia** cheese production is expected at 375,000 tons in 2022, nearly 3 percent below last year due in part to tighter milk supplies. However, processors continue to prioritize cheese over other manufactured commodities, particularly whole milk powder (WMP), leading cheese output to shrink more modestly than overall non-fluid use. This pattern of use has been the long-term trend in Australia and has been further supported this year by a widening spread between cheese and WMP prices. With COVID-related lockdowns ending and international visitors returning to Australia, cheese consumption is expected to strengthen 5 percent over 2021. Relatively large stocks will support higher consumption and exports despite lower production and lackluster import demand. Cheese exports are forecast to grow 1 percent in 2022, reaching 159,000 tons, despite lower production. Through April, lockdowns in China have weighed on cheese demand in Australia's second-largest market, but this has been nearly offset by growth in shipments to Japan and Southeast Asia. Some recovery in China and steady shipments to other markets as the year goes on are expected to push trade just above 2021 levels.

- Despite falling milk deliveries, **European Union** cheese production is expected to rise nearly 1 percent year over year to 10.60 million tons as good export prospects and a firm domestic market cause dairy processors to continue favoring the cheese/whey stream over other dairy commodities. Furthermore, several new cheese plants producing industrial mozzarella for the food processing industry are expected to support production this year. Cheese exports are expected to rise 1 percent in 2022 after Brexit-related disruptions caused shipments to the United Kingdom to contract last year. This growth is expected to cause cheese exports to be near the levels achieved in 2020. While tighter milk supplies may increase the cost of commodity cheese and weigh on competitiveness, specialty cheeses are expected to continue being effectively marketed and should see further export gains. Through April, the largest markets for European Union cheese are the United Kingdom, the United States, and Japan – the same as in 2021. To date, higher shipments to the UK (+10 percent) and United States (+12 percent) have offset weak shipments to Japan (-6 percent).

- **U.S.** cheese exports are expected to climb nearly 8 percent year over year to 433,000 tons on strong shipments to top markets Mexico, South Korea, and Japan. In Mexico, U.S. cheese exports are benefiting from growing demand for specialty cheeses among middle and high-income consumers. Additionally, demand for commodity cheese among lower-income Mexican consumers has been resilient as high prices for meat cause substitution to other animal proteins. In South Korea and Japan, lower cheese production and high prices for Australia and New Zealand product have created opportunities for U.S. cheese exporters.

## BUTTER (Includes Butteroil/AMF):

**Butter Exports Summary for Major Exporters**
**(1,000 Butter Equivalent Tons)**

| | 2020 | 2021 | 2022 Forecast | 2021-2022 Change |
|---|---|---|---|---|
| **Belarus** | 69 | 78 | 78 | **0%** |
| **EU-27** | 316 | 265 | 270 | **2%** |
| **New Zealand** | 471 | 436 | 445 | **2%** |
| **United States** | 27 | 60 | 65 | **8%** |
| **Major Exporter Total** | 883 | 839 | 858 | **2%** |

Note: Data is rounded.

- Butter production during 2022 in **New Zealand** is expected at 480,000 tons, 2 percent higher than last year. Despite lower milk production, better returns for manufacturing butter and SMP will keep milk flowing to this end use at the expense of WMP. Expanding butter production is forecast to push exports up 2 percent year-over-year to 445,000 tons. The largest markets for New Zealand butter are China, the Philippines, and Australia.

- **European Union** butter production is expected to decline for a second consecutive year on smaller milk deliveries, down 3 percent year over year to 2.07 million tons in 2022. Dairy processors directed milk away from the butter/powder stream and towards cheese/whey last year; this is expected to continue in 2022 as domestic consumption trends lower. Meanwhile, butter exports are expected to rise 2 percent year over year, reaching 270,000 tons, as strong demand in the United States more than offsets lower demand from China, Saudi Arabia, and Morocco.

## **SKIMMED MILK POWDER (SMP):**

**SMP Exports Summary for Major Exporters**
**(1,000 Tons)**

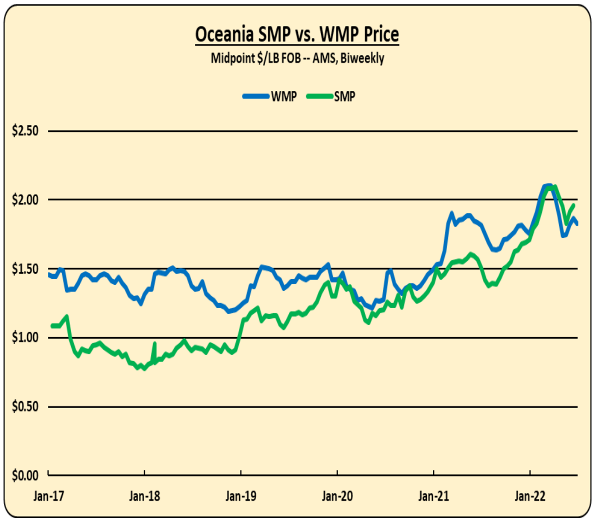
| | 2020 | 2021 | 2022 Forecast | 2021-2022 Change |
|---|---|---|---|---|
| **Australia** | 129 | 156 | 150 | **-4%** |
| **Belarus** | 123 | 120 | 123 | **3%** |
| **EU-27** | 831 | 788 | 700 | **-11%** |
| **New Zealand** | 356 | 326 | 355 | **9%** |
| **United States** | 810 | 881 | 874 | **-1%** |
| **Major Exporter Total** | **2,249** | **2,271** | **2,202** | **-3%** |

Note Data is rounded.

- Despite lower milk production, **Australia** SMP production is forecast 5 percent higher at 154,000 tons. Production has rebounded from low levels in 2021 as strong SMP prices, which have outpaced those of WMP since the beginning of the second quarter, are expected to shift milk from WMP to SMP/butter production. Despite SMP exports that are 11 percent higher to date through April, trade for the year is nevertheless forecast to decline 4 percent from 2021 to 150,000 tons. Low carry-in stocks limit the ability of the Australian dairy sector to take advantage of strong global SMP prices. Furthermore, much of the product traded in early 2022 was produced in the peak production period of the prior year. As lower milk production starts to have an impact, the export volumes at the start of the year will likely prove unsustainable, even with a further drawdown in SMP stocks and additional milk pulled from the WMP stream.

- Reflecting tighter milk supplies and lower butter output, **European Union** SMP production in 2022 is forecast to decline 3 percent from 2021 to 1.49 million tons. Coupled with tighter supplies, exports are also expected to come under pressure as high domestic prices weigh on EU competitiveness in the global marketplace. Volumes are forecast down 11 percent year over year to 700,000 tons. The top markets for EU SMP are China, Algeria, and Indonesia. To date through April, EU SMP exports are more than 20 percent lower than the same period in 2021; however, high oil prices are expected to support demand from importers in the Middle East and allow for some recovery later in the year. Additionally, easing COVID-related lockdowns in China could support some improvement in shipments.

- SMP production in **New Zealand** is forecast at 350,000 tons in 2022, up 6 percent from the previous year despite lower milk production. Strong SMP prices are expected to cause processors to prioritize SMP instead of WMP, as prices for SMP have exceeded WMP for much of the first half of 2022. Underpinning SMP prices has been strong global demand and tighter expected supplies among the major exporters, which are expected to boost New Zealand SMP exports 9 percent year-over-year in 2022 to 355,000 tons. Despite weakness in shipments to China through May (-35 percent), shipments to other major markets including Indonesia (+81 percent), Thailand (49 percent), and Malaysia (55 percent) have been more than enough to leave New Zealand exports for the first 5 months of 2022 6 percent higher than a year earlier.




- Despite **U.S.** SMP being competitively priced on the global stage, U.S. exports are forecast to decline 1 percent, to 874,000 tons, from the record levels of last year. Contributing to the lower SMP export forecast is fractionally lower milk production. Processors are expected to prioritize cheese production where new capacity has been added over the last several years.

## WHOLE MILK POWDER (WMP):

**WMP Exports Summary for Major Exporters**
**(1,000 Tons)**

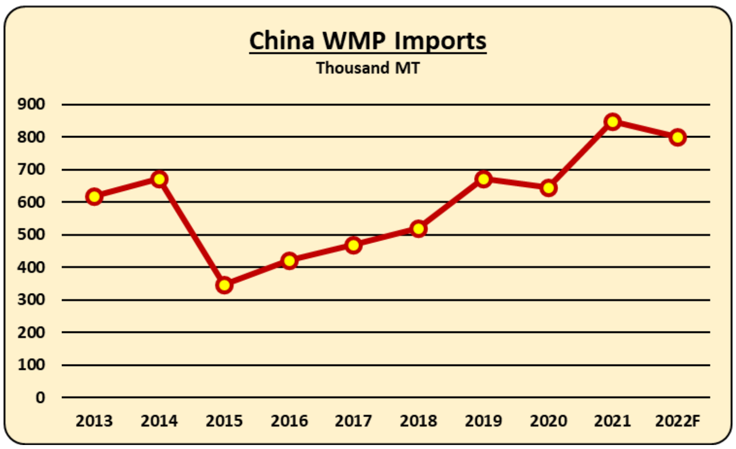
| | 2020 | 2021 | 2022 Forecast | 2021-2022 Change |
|---|---|---|---|---|
| **Argentina** | 148 | 145 | 180 | **24%** |
| **Australia** | 37 | 51 | 55 | **8%** |
| **EU-27** | 345 | 298 | 260 | **-13%** |
| **New Zealand** | 1,533 | 1,617 | 1,465 | **-9%** |
| **Major Exporter Total** | **2,063** | **2,111** | **1,960** | **-7%** |

Note: Data is rounded.

- **New Zealand** WMP production is forecast at 1.53 million tons, more than 4 percent lower than 2021 on tighter milk supplies and pricing that favors directing milk to the SMP/butter or cheese stream. The WMP export forecast is down 9 percent year over year to 1.47 million tons on tighter supplies and lower demand from China. Through

May, WMP exports are down 19 percent as lower shipments to China (-39 percent) more than offset gains to other parts of the world. As COVID-related lockdowns ease and logistics improve, it is expected that China demand will experience some recovery, though it will likely remain below 2021 levels. So far this year, China remains the top market for New Zealand WMP followed by Indonesia, Bangladesh, Thailand, and Algeria.

- **China** WMP production is forecast to rise 4 percent in 2022, reaching 1.05 million tons, as domestic milk supplies continue to grow, and COVID-related lockdowns cause more milk to be sent to the dryer. With lower demand, rising stocks, and high global prices, imports of WMP are expected to decline 6 percent from the record levels of 2021 to 800,000 tons.



## U.S. Dairy Products Export Forecast - Calendar Year 2022

| | 2022 (For) | | Milk Equivalent (Bil. Lbs) Fat | Skims |
|---|---|---|---|---|
| NON-FAT DRY AND SKIM MILK PWDR | 873,950 | MT | 0.4 | 20.4 |
| MILK POWDER > 1.5% MILK FAT | 43,075 | MT | 0.6 | 0.7 |
| BUTTER/MILKFAT/SPREADS | 60,521 | MT | 2.8 | 0.0 |
| CHEESE AND CURD | 433,179 | MT | 6.4 | 3.4 |
| FLUID PRODUCTS 4/ | 180,345 | Liters | 0.5 | 0.4 |
| DRIED WHEY PRODUCTS | 588,698 | MT | 0.7 | 13.5 |
| LACTOSE | 402,133 | MT | 0.0 | 9.8 |
| OTHER DAIRY PRODUCTS | 216,190 | MT | 0.7 | 2.3 |
| TOTAL - Billion Pounds | | | 12.2 | 50.5 |

Note: 1) CY 2022 includes actual exports through May 2022
2) Milk Equivalent figures are rounded and totals may not add up.
3) Forecasts assume current policy
4/ Includes milk based drinks, fluid whey, cream and fluid milk

## Exports on a Milk Equivalent Basis Through May 2022

| Top Dest. -M.E. Milkfat Basis (Mill. lbs) | 2022 | |
|---|---|---|
| MEXICO | 1,232 | 23% |
| CANADA | 810 | 15% |
| SOUTH KOREA | 646 | 12% |
| JAPAN | 371 | 7% |
| AUSTRALIA | 205 | 4% |
| CHINA (MAINLAND) | 203 | 4% |
| Other | 1,947 | 36% |
| TOTAL | 5,415 | |

| Top Dest.-M.E. Skim Basis (Mill. lbs) | 2022 | |
|---|---|---|
| MEXICO | 4,470 | 21% |
| CHINA (MAINLAND) | 4,129 | 19% |
| PHILIPPINES | 1,923 | 9% |
| INDONESIA | 1,544 | 7% |
| VIETNAM | 1,101 | 5% |
| JAPAN | 1,068 | 5% |
| Other | 7,250 | 34% |
| TOTAL | 21,484 | |

## Additional Resources:

For additional information, please contact Paul Kiendl at 202-720-8870 or Paul.Kiendl@usda.gov or Jacob Vuillemin at 202-690-4476 or Jacob.Vuillemin@usda.gov.

Subscription services for FAS circulars can be obtained at: https://public.govdelivery.com/accounts/USDAFAS/subscriber/new

Individual FAS country reports covering dairy are available at: https://gain.fas.usda.gov/#/

The USDA Production, Supply and Demand database is available at: https://apps.fas.usda.gov/psdonline/app/index.html#/app/home

A monthly "Livestock, Dairy, and Poultry Outlook" for the United States published by the Economic Research Service is available at: https://www.ers.usda.gov/publications/

U.S. trade data is available on the Global Agricultural Trade System (GATS): https://apps.fas.usda.gov/gats/default.aspx

The next publication of this circular will be on December 20, 2022.

## Circular Notes:

- Fluid milk in liters is converted to kilograms using a 1.03 conversion factor.
- U.S. cheese imports only include cow's milk cheeses.
- For the United States, SMP includes nonfat dry milk for human and animal use and skimmed milk powder.
- The Butter PS&D's include butter, anhydrous milk fat (AMF), and butteroil. The AMF and butteroil are converted to a butter-equivalent basis by multiplying by 1.25.

## Fluid Milk - Cow Numbers: Summary For Selected Countries

**1,000 Head**

| | 2018 | 2019 | 2020 | 2021 | 2022 Dec | 2022 Jul |
|---|---|---|---|---|---|---|
| **Cows In Milk** | | | | | | |
| India | 52,482 | 54,600 | 56,450 | 58,000 | 59,800 | 59,800 |
| European Union | 21,409 | 21,029 | 20,766 | 20,536 | 20,300 | 20,200 |
| Brazil | 16,300 | 16,500 | 16,400 | 16,646 | 16,896 | 16,896 |
| Mexico | 6,550 | 6,500 | 6,550 | 6,600 | 6,650 | 6,650 |
| Russia | 6,815 | 6,711 | 6,615 | 6,495 | 6,430 | 6,430 |
| China | 6,200 | 6,100 | 6,150 | 6,200 | 6,300 | 6,400 |
| New Zealand | 4,993 | 4,946 | 4,922 | 4,904 | 4,875 | 4,875 |
| United Kingdom | 1,904 | 1,879 | 1,867 | 1,856 | 1,840 | 1,840 |
| Argentina | 1,640 | 1,598 | 1,610 | 1,615 | 1,630 | 1,640 |
| Ukraine | 2,078 | 1,970 | 1,789 | 1,722 | 1,640 | 1,550 |
| Belarus | 1,500 | 1,498 | 1,485 | 1,480 | 1,475 | 1,475 |
| Australia | 1,525 | 1,440 | 1,385 | 1,365 | 1,420 | 1,335 |
| Canada | 970 | 968 | 972 | 991 | 990 | 988 |
| Japan | 731 | 730 | 715 | 726 | 730 | 730 |
| Korea, South | 205 | 204 | 202 | 204 | 203 | 203 |
| Taiwan | 62 | 62 | 63 | 66 | 66 | 66 |
| Philippines | 11 | 11 | 11 | 11 | 12 | 12 |
| **Subtotal** | 125,375 | 126,746 | 127,952 | 129,417 | 131,257 | 131,090 |
| **United States** | 9,398 | 9,337 | 9,392 | 9,448 | 9,385 | 9,400 |
| **Total** | 134,773 | 136,083 | 137,344 | 138,865 | 140,642 | 140,490 |

## Cows Milk Production and Consumption: Summary For Selected Countries

**1,000 Metric Tons**

| | 2018 | 2019 | 2020 | 2021 | 2022 Dec | 2022 Jul |
|---|---|---|---|---|---|---|
| **Cows Milk Production** | | | | | | |
| European Union | 142,258 | 143,060 | 145,436 | 145,034 | 146,700 | 142,250 |
| India | 89,800 | 92,000 | 93,800 | 96,000 | 98,000 | 98,000 |
| China | 30,750 | 32,012 | 34,400 | 36,830 | 35,500 | 38,500 |
| Russia | 30,398 | 31,154 | 32,010 | 32,020 | 32,150 | 32,150 |
| Brazil | 23,745 | 24,262 | 24,965 | 24,845 | 25,095 | 25,095 |
| New Zealand | 22,017 | 21,896 | 21,980 | 21,995 | 22,250 | 21,875 |
| United Kingdom | 15,189 | 15,429 | 15,447 | 15,500 | 15,600 | 15,190 |
| Mexico | 12,368 | 12,650 | 12,750 | 12,850 | 12,980 | 12,980 |
| Argentina | 10,837 | 10,640 | 11,445 | 11,900 | 12,100 | 12,000 |
| Canada | 9,944 | 9,903 | 10,035 | 10,185 | 10,330 | 10,090 |
| Australia | 9,451 | 8,832 | 9,099 | 9,019 | 9,100 | 8,730 |
| Belarus | 7,345 | 7,394 | 7,765 | 7,830 | 7,900 | 7,910 |
| Ukraine | 10,070 | 9,646 | 9,258 | 8,800 | 8,300 | 7,800 |
| Japan | 7,289 | 7,314 | 7,438 | 7,515 | 7,570 | 7,625 |
| Korea, South | 2,041 | 2,035 | 2,088 | 2,030 | 2,040 | 2,040 |
| Taiwan | 385 | 410 | 437 | 437 | 440 | 440 |
| Philippines | 16 | 17 | 17 | 16 | 17 | 17 |
| **Subtotal** | 423,903 | 428,654 | 438,370 | 442,806 | 446,072 | 442,692 |
| **United States** | 98,688 | 99,084 | 101,292 | 102,630 | 103,284 | 102,490 |
| **Total** | 522,591 | 527,738 | 539,662 | 545,436 | 549,356 | 545,182 |
| **Fluid Use Dom. Consum.** | | | | | | |
| India | 77,000 | 79,000 | 81,000 | 83,000 | 85,000 | 85,000 |
| European Union | 23,313 | 23,373 | 24,106 | 23,937 | 23,950 | 23,500 |
| China | 12,700 | 13,200 | 13,000 | 15,595 | 14,995 | 16,925 |
| Brazil | 10,762 | 10,900 | 11,170 | 11,120 | 11,231 | 11,231 |
| Russia | 7,318 | 7,270 | 7,080 | 6,990 | 6,900 | 6,900 |
| United Kingdom | 6,763 | 6,404 | 6,376 | 6,280 | 6,250 | 6,250 |
| Ukraine | 4,862 | 4,967 | 5,025 | 4,960 | 4,593 | 4,543 |
| Mexico | 4,183 | 4,190 | 4,145 | 4,150 | 4,166 | 4,166 |
| Japan | 3,995 | 4,000 | 4,020 | 4,050 | 4,065 | 4,065 |
| Canada | 2,832 | 2,816 | 2,844 | 2,835 | 2,825 | 2,810 |
| Australia | 2,620 | 2,536 | 2,528 | 2,482 | 2,500 | 2,450 |
| Argentina | 1,771 | 1,645 | 1,800 | 1,640 | 1,710 | 1,650 |
| Korea, South | 1,566 | 1,575 | 1,523 | 1,540 | 1,530 | 1,530 |
| Belarus | 1,050 | 1,055 | 1,075 | 1,085 | 1,080 | 1,080 |
| New Zealand | 515 | 520 | 525 | 530 | 535 | 535 |
| Taiwan | 420 | 446 | 476 | 471 | 480 | 480 |
| Philippines | 96 | 117 | 119 | 124 | 130 | 130 |
| **Subtotal** | 161,766 | 164,014 | 166,812 | 170,789 | 171,940 | 173,245 |
| **United States** | 21,425 | 21,050 | 21,027 | 21,000 | 20,975 | 20,975 |
| **Total** | 183,191 | 185,064 | 187,839 | 191,789 | 192,915 | 194,220 |

## Cheese Production and Consumption: Summary For Selected Countries

**1,000 Metric Tons**

| | 2018 | 2019 | 2020 | 2021 | 2022 Dec | 2022 Jul |
|---|---|---|---|---|---|---|
| **Production** | | | | | | |
| European Union | 9,872 | 10,155 | 10,362 | 10,550 | 10,400 | 10,600 |
| Russia | 970 | 983 | 1,059 | 1,075 | 1,085 | 1,085 |
| Brazil | 760 | 770 | 790 | 790 | 795 | 795 |
| Argentina | 444 | 523 | 488 | 530 | 550 | 535 |
| Canada | 510 | 515 | 523 | 540 | 550 | 535 |
| United Kingdom | 472 | 472 | 488 | 505 | 515 | 485 |
| Mexico | 419 | 437 | 446 | 448 | 452 | 452 |
| Australia | 366 | 364 | 379 | 385 | 370 | 375 |
| New Zealand | 370 | 365 | 350 | 380 | 385 | 375 |
| Belarus | 275 | 300 | 346 | 355 | 370 | 370 |
| Others | 284 | 285 | 289 | 296 | 308 | 264 |
| **Total Foreign** | 14,742 | 15,169 | 15,520 | 15,854 | 15,780 | 15,871 |
| **United States** | 5,914 | 5,959 | 6,005 | 6,217 | 6,299 | 6,288 |
| **Total** | 20,656 | 21,128 | 21,525 | 22,071 | 22,079 | 22,159 |
| **Total Dom. Consumption** | | | | | | |
| European Union | 8,790 | 9,019 | 9,183 | 9,361 | 9,180 | 9,400 |
| Russia | 1,200 | 1,231 | 1,338 | 1,363 | 1,380 | 1,390 |
| Brazil | 785 | 795 | 817 | 817 | 824 | 822 |
| United Kingdom | 793 | 790 | 783 | 751 | 825 | 745 |
| Mexico | 526 | 551 | 549 | 568 | 569 | 589 |
| Canada | 536 | 539 | 555 | 573 | 594 | 582 |
| Argentina | 380 | 461 | 420 | 457 | 455 | 435 |
| Japan | 329 | 346 | 335 | 335 | 345 | 336 |
| Australia | 293 | 297 | 305 | 305 | 310 | 321 |
| Korea, South | 155 | 166 | 188 | 195 | 201 | 193 |
| Others | 496 | 516 | 550 | 620 | 666 | 548 |
| **Total Foreign** | 14,283 | 14,711 | 15,023 | 15,345 | 15,349 | 15,361 |
| **United States** | 5,675 | 5,751 | 5,745 | 5,939 | 6,080 | 6,034 |
| **Total** | 19,958 | 20,462 | 20,768 | 21,284 | 21,429 | 21,395 |

## Cheese Trade: Summary For Selected Countries

**1,000 Metric Tons**

| | 2018 | 2019 | 2020 | 2021 | 2022 Dec | 2022 Jul |
|---|---|---|---|---|---|---|
| **Total Exports** | | | | | | |
| European Union | 1,279 | 1,348 | 1,402 | 1,385 | 1,420 | 1,400 |
| New Zealand | 322 | 335 | 327 | 358 | 355 | 340 |
| Belarus | 211 | 244 | 275 | 298 | 310 | 310 |
| United Kingdom | 187 | 206 | 190 | 154 | 165 | 170 |
| Australia | 172 | 160 | 153 | 157 | 165 | 159 |
| Argentina | 61 | 61 | 70 | 78 | 85 | 85 |
| Russia | 24 | 26 | 30 | 35 | 45 | 40 |
| Others | 39 | 30 | 35 | 35 | 38 | 32 |
| **Total Foreign** | 2,295 | 2,410 | 2,482 | 2,500 | 2,583 | 2,536 |
| **United States** | 348 | 357 | 355 | 402 | 413 | 433 |
| **Total** | 2,643 | 2,767 | 2,837 | 2,902 | 2,996 | 2,969 |
| **Total Imports** | | | | | | |
| United Kingdom | 508 | 524 | 485 | 400 | 475 | 430 |
| Russia | 250 | 273 | 311 | 326 | 340 | 345 |
| Japan | 286 | 303 | 292 | 288 | 295 | 285 |
| European Union | 197 | 212 | 223 | 196 | 200 | 200 |
| China | 108 | 115 | 129 | 176 | 200 | 160 |
| Korea, South | 124 | 131 | 148 | 157 | 160 | 150 |
| Mexico | 123 | 121 | 114 | 132 | 130 | 150 |
| Others | 264 | 277 | 309 | 339 | 359 | 302 |
| **Total Foreign** | 1,860 | 1,956 | 2,011 | 2,014 | 2,159 | 2,022 |
| **United States** | 138 | 139 | 128 | 145 | 190 | 155 |
| **Total** | 1,998 | 2,095 | 2,139 | 2,159 | 2,349 | 2,177 |

## Butter Production and Consumption: Summary For Selected Countries

**1,000 Metric Tons**

| | 2018 | 2019 | 2020 | 2021 | 2022 Dec | 2022 Jul |
|---|---|---|---|---|---|---|
| **Production** | | | | | | |
| India | 5,600 | 5,850 | 6,100 | 6,300 | 6,500 | 6,500 |
| European Union | 2,069 | 2,125 | 2,173 | 2,141 | 2,145 | 2,070 |
| New Zealand | 550 | 525 | 500 | 470 | 485 | 480 |
| Russia | 256 | 268 | 282 | 270 | 280 | 280 |
| Mexico | 228 | 231 | 233 | 235 | 236 | 236 |
| United Kingdom | 140 | 194 | 194 | 205 | 210 | 195 |
| Belarus | 115 | 116 | 120 | 121 | 125 | 123 |
| Canada | 116 | 112 | 118 | 122 | 125 | 120 |
| China | 108 | 110 | 108 | 109 | 109 | 109 |
| Brazil | 85 | 85 | 82 | 82 | 83 | 83 |
| Others | 292 | 254 | 270 | 254 | 267 | 233 |
| **Total Foreign** | 9,559 | 9,870 | 10,180 | 10,309 | 10,565 | 10,429 |
| **United States** | 893 | 905 | 973 | 940 | 990 | 974 |
| **Total** | 10,452 | 10,775 | 11,153 | 11,249 | 11,555 | 11,403 |
| **Domestic Consumption** | | | | | | |
| India | 5,577 | 5,803 | 6,081 | 6,275 | 6,470 | 6,456 |
| European Union | 1,898 | 1,901 | 1,909 | 1,927 | 1,935 | 1,845 |
| Russia | 346 | 384 | 402 | 393 | 394 | 394 |
| Mexico | 250 | 277 | 266 | 256 | 258 | 259 |
| China | 226 | 198 | 230 | 246 | 277 | 240 |
| United Kingdom | 153 | 195 | 203 | 205 | 215 | 205 |
| Canada | 124 | 141 | 141 | 147 | 149 | 150 |
| Australia | 117 | 104 | 106 | 95 | 105 | 91 |
| Brazil | 91 | 89 | 85 | 88 | 90 | 86 |
| Japan | 78 | 83 | 79 | 81 | 81 | 80 |
| Others | 186 | 201 | 200 | 178 | 197 | 181 |
| **Total Foreign** | 9,046 | 9,376 | 9,702 | 9,891 | 10,171 | 9,987 |
| **United States** | 898 | 940 | 978 | 975 | 1,011 | 1,003 |
| **Total** | 9,944 | 10,316 | 10,680 | 10,866 | 11,182 | 10,990 |

Note: Butter includes butter, butteroil and anhydrous milk fat on a butter equivalent basis.

## Butter Trade:  Summary For Selected Countries

**1,000 Metric Tons**

| | 2018 | 2019 | 2020 | 2021 | 2022 Dec | 2022 Jul |
|---|---|---|---|---|---|---|
| **Total Imports** | | | | | | |
| China | 120 | 91 | 123 | 139 | 170 | 133 |
| Russia | 88 | 117 | 128 | 122 | 120 | 120 |
| United Kingdom | 78 | 74 | 74 | 55 | 60 | 60 |
| European Union | 76 | 78 | 52 | 51 | 45 | 45 |
| Canada | 22 | 25 | 24 | 30 | 30 | 35 |
| Australia | 42 | 40 | 43 | 37 | 45 | 33 |
| Mexico | 33 | 59 | 42 | 23 | 24 | 24 |
| Taiwan | 23 | 24 | 22 | 22 | 23 | 23 |
| Japan | 16 | 25 | 18 | 12 | 11 | 10 |
| Ukraine | 1 | 4 | 10 | 10 | 5 | 5 |
| Others | 8 | 6 | 5 | 8 | 8 | 6 |
| **Total Foreign** | 507 | 543 | 541 | 509 | 541 | 494 |
| **United States** | 59 | 66 | 70 | 61 | 73 | 69 |
| **Total** | 566 | 609 | 611 | 570 | 614 | 563 |
| **Total Exports** | | | | | | |
| New Zealand | 501 | 509 | 471 | 436 | 455 | 445 |
| European Union | 247 | 302 | 316 | 265 | 255 | 270 |
| Belarus | 78 | 67 | 69 | 78 | 75 | 78 |
| United Kingdom | 65 | 73 | 65 | 55 | 55 | 50 |
| India | 33 | 47 | 20 | 25 | 30 | 44 |
| Argentina | 11 | 15 | 21 | 31 | 35 | 25 |
| Australia | 17 | 18 | 16 | 22 | 20 | 19 |
| Ukraine | 29 | 16 | 9 | 9 | 8 | 5 |
| Russia | 3 | 2 | 3 | 3 | 3 | 3 |
| China | 2 | 3 | 1 | 2 | 2 | 2 |
| Others | 13 | 16 | 14 | 4 | 3 | 3 |
| **Total Foreign** | 999 | 1,068 | 1,005 | 930 | 941 | 944 |
| **United States** | 49 | 26 | 27 | 60 | 54 | 65 |
| **Total** | 1,048 | 1,094 | 1,032 | 990 | 995 | 1,009 |

## Nonfat Dry Milk Production and Consumption: Summary For Selected Countries

**1,000 Metric Tons**

| | 2018 | 2019 | 2020 | 2021 | 2022 Dec | 2022 Jul |
|---|---|---|---|---|---|---|
| **Production** | | | | | | |
| European Union | 1,568 | 1,556 | 1,590 | 1,526 | 1,560 | 1,485 |
| India | 600 | 635 | 660 | 680 | 700 | 700 |
| New Zealand | 410 | 375 | 362 | 330 | 355 | 350 |
| Brazil | 155 | 158 | 161 | 164 | 165 | 165 |
| Australia | 201 | 150 | 155 | 147 | 150 | 154 |
| Japan | 120 | 125 | 140 | 150 | 150 | 150 |
| Belarus | 122 | 126 | 126 | 122 | 127 | 125 |
| Others | 418 | 421 | 432 | 431 | 452 | 438 |
| **Total Foreign** | 3,594 | 3,546 | 3,626 | 3,550 | 3,659 | 3,567 |
| **United States** | 1,067 | 1,107 | 1,209 | 1,238 | 1,235 | 1,215 |
| **Total** | 4,661 | 4,653 | 4,835 | 4,788 | 4,894 | 4,782 |
| **Total Dom. Consumption** | | | | | | |
| European Union | 992 | 834 | 795 | 770 | 755 | 810 |
| India | 572 | 601 | 636 | 653 | 682 | 662 |
| Mexico | 347 | 340 | 353 | 382 | 385 | 385 |
| China | 299 | 358 | 355 | 446 | 498 | 373 |
| Philippines | 159 | 177 | 204 | 185 | 180 | 214 |
| Indonesia | 161 | 187 | 196 | 197 | 204 | 209 |
| Brazil | 184 | 183 | 187 | 188 | 191 | 183 |
| Others | 779 | 730 | 715 | 748 | 762 | 740 |
| **Total Foreign** | 3,493 | 3,410 | 3,441 | 3,569 | 3,657 | 3,576 |
| **United States** | 369 | 422 | 384 | 375 | 315 | 321 |
| **Total** | 3,862 | 3,832 | 3,825 | 3,944 | 3,972 | 3,897 |

## Nonfat Dry Milk Trade: Summary For Selected Countries

**1,000 Metric Tons**

| | 2018 | 2019 | 2020 | 2021 | 2022 Dec | 2022 Jul |
|---|---|---|---|---|---|---|
| **Total Imports** | | | | | | |
| China | 280 | 344 | 336 | 426 | 475 | 350 |
| Mexico | 360 | 361 | 309 | 338 | 340 | 340 |
| Philippines | 159 | 177 | 179 | 168 | 175 | 220 |
| Indonesia | 162 | 188 | 197 | 199 | 205 | 210 |
| Algeria | 167 | 120 | 144 | 138 | 145 | 140 |
| Russia | 95 | 88 | 60 | 59 | 55 | 55 |
| European Union | 46 | 56 | 36 | 32 | 20 | 25 |
| Taiwan | 23 | 23 | 24 | 25 | 24 | 23 |
| Japan | 52 | 47 | 39 | 22 | 18 | 20 |
| Brazil | 29 | 25 | 26 | 24 | 26 | 18 |
| Others | 88 | 87 | 83 | 70 | 83 | 59 |
| **Total Foreign** | 1,461 | 1,516 | 1,433 | 1,501 | 1,566 | 1,460 |
| **United States** | 1 | 1 | 1 | 1 | 1 | 1 |
| **Total** | 1,462 | 1,517 | 1,434 | 1,502 | 1,567 | 1,461 |
| **Total Exports** | | | | | | |
| European Union | 826 | 946 | 831 | 788 | 825 | 700 |
| New Zealand | 358 | 373 | 356 | 326 | 355 | 355 |
| Australia | 155 | 128 | 129 | 156 | 120 | 150 |
| Belarus | 121 | 124 | 123 | 120 | 125 | 123 |
| India | 43 | 8 | 5 | 45 | 32 | 52 |
| United Kingdom | 60 | 82 | 72 | 52 | 65 | 40 |
| Canada | 66 | 47 | 40 | 18 | 16 | 25 |
| Argentina | 23 | 22 | 28 | 21 | 30 | 22 |
| Ukraine | 23 | 20 | 16 | 13 | 12 | 15 |
| Philippines | 0 | 0 | 0 | 1 | 0 | 2 |
| Others | 60 | 68 | 6 | 9 | 6 | 6 |
| **Total Foreign** | 1,735 | 1,818 | 1,606 | 1,549 | 1,586 | 1,490 |
| **United States** | 712 | 701 | 810 | 881 | 917 | 874 |
| **Total** | 2,447 | 2,519 | 2,416 | 2,430 | 2,503 | 2,364 |

## Whole Milk Powder Production And Consumption: Summary For Selected Countries

**1,000 Metric Tons**

| | 2018 | 2019 | 2020 | 2021 | 2022 Dec | 2022 Jul |
|---|---|---|---|---|---|---|
| **Production** | | | | | | |
| New Zealand | 1,450 | 1,490 | 1,570 | 1,600 | 1,600 | 1,530 |
| China | 965 | 1,052 | 992 | 1,010 | 970 | 1,050 |
| European Union | 684 | 697 | 736 | 663 | 590 | 620 |
| Brazil | 585 | 596 | 590 | 594 | 595 | 595 |
| Argentina | 192 | 188 | 213 | 234 | 240 | 245 |
| Mexico | 119 | 120 | 122 | 123 | 124 | 124 |
| Indonesia | 81 | 82 | 85 | 96 | 100 | 100 |
| Chile | 62 | 70 | 73 | 65 | 72 | 72 |
| Belarus | 50 | 45 | 49 | 57 | 60 | 57 |
| Russia | 56 | 65 | 55 | 52 | 55 | 55 |
| Others | 98 | 77 | 58 | 67 | 61 | 50 |
| **Total Foreign** | 4,342 | 4,482 | 4,543 | 4,561 | 4,467 | 4,498 |
| **United States** | 65 | 64 | 63 | 67 | 63 | 63 |
| **Total** | 4,407 | 4,546 | 4,606 | 4,628 | 4,530 | 4,561 |
| **Total Dom. Consumption** | | | | | | |
| China | 1,534 | 1,722 | 1,585 | 1,807 | 1,919 | 1,827 |
| Brazil | 652 | 657 | 678 | 640 | 648 | 621 |
| European Union | 381 | 424 | 418 | 376 | 315 | 370 |
| Algeria | 245 | 250 | 256 | 240 | 215 | 233 |
| Indonesia | 142 | 135 | 134 | 153 | 167 | 170 |
| Mexico | 103 | 106 | 105 | 116 | 113 | 111 |
| Russia | 100 | 110 | 94 | 80 | 78 | 78 |
| Argentina | 75 | 84 | 80 | 73 | 90 | 70 |
| Chile | 66 | 71 | 75 | 75 | 79 | 67 |
| Taiwan | 34 | 32 | 36 | 36 | 35 | 41 |
| Others | 138 | 146 | 118 | 106 | 115 | 108 |
| **Total Foreign** | 3,470 | 3,737 | 3,579 | 3,702 | 3,774 | 3,696 |
| **United States** | 31 | 36 | 34 | 34 | 28 | 34 |
| **Total** | 3,501 | 3,773 | 3,613 | 3,736 | 3,802 | 3,730 |

## Whole Milk Powder Trade: Summary For Selected Countries

**1,000 Metric Tons**

| | 2018 | 2019 | 2020 | 2021 | 2022 Dec | 2022 Jul |
|---|---|---|---|---|---|---|
| **Total Imports** | | | | | | |
| China | 521 | 671 | 644 | 849 | 880 | 800 |
| Algeria | 271 | 233 | 251 | 221 | 205 | 225 |
| Indonesia | 59 | 54 | 51 | 63 | 67 | 80 |
| Taiwan | 34 | 32 | 36 | 36 | 35 | 41 |
| Australia | 28 | 37 | 43 | 37 | 40 | 40 |
| Brazil | 68 | 61 | 89 | 52 | 60 | 32 |
| Russia | 27 | 46 | 31 | 28 | 25 | 25 |
| Philippines | 23 | 32 | 29 | 19 | 25 | 18 |
| European Union | 43 | 42 | 27 | 11 | 5 | 10 |
| Mexico | 7 | 3 | 3 | 7 | 8 | 6 |
| Others | 21 | 19 | 11 | 9 | 12 | 7 |
| **Total Foreign** | 1,102 | 1,230 | 1,215 | 1,332 | 1,362 | 1,284 |
| **United States** | 7 | 9 | 13 | 9 | 11 | 11 |
| **Total** | 1,109 | 1,239 | 1,228 | 1,341 | 1,373 | 1,295 |
| **Total Exports** | | | | | | |
| New Zealand | 1,369 | 1,536 | 1,533 | 1,617 | 1,600 | 1,465 |
| European Union | 346 | 315 | 345 | 298 | 280 | 260 |
| Argentina | 135 | 97 | 148 | 145 | 145 | 180 |
| Australia | 55 | 42 | 37 | 51 | 50 | 55 |
| Belarus | 33 | 23 | 27 | 37 | 39 | 36 |
| Mexico | 23 | 17 | 20 | 14 | 19 | 19 |
| Chile | 4 | 4 | 2 | 2 | 2 | 10 |
| Brazil | 1 | 0 | 1 | 6 | 7 | 6 |
| China | 2 | 1 | 1 | 2 | 1 | 3 |
| Russia | 0 | 0 | 1 | 1 | 2 | 2 |
| Others | 4 | 10 | 6 | 5 | 4 | 2 |
| **Total Foreign** | 1,972 | 2,045 | 2,121 | 2,178 | 2,149 | 2,038 |
| **United States** | 48 | 39 | 39 | 39 | 46 | 43 |
| **Total** | 2,020 | 2,084 | 2,160 | 2,217 | 2,195 | 2,081 |