

Mideast Market Administrator's Bulletin

Federal Order No. 33

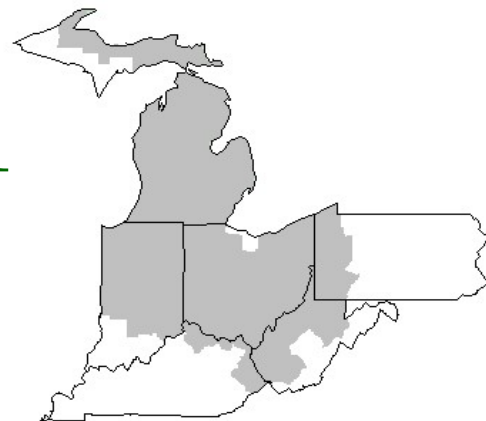
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DECEMBER 2025



Dairy Forecast for 2025

Dairy Forecasts for 2025 Total U.S. milk production for 2025 is forecast at 231.4 billion pounds, unchanged from the last projection. For the year, the dairy cow inventory is projected to average 9.495 million head while the milk yield per cow is projected to average 24,375 pounds.

With continued strength in butter exports in the first 8 months of the year, the dairy export forecasts for 2025 are adjusted upward from last month's forecast. On a milk-fat basis, 2025 dairy exports are forecast at 16.2 (+0.2) billion pounds, while on a skim-solids basis the 2025 dairy export forecast is 48.2 billion pounds, unchanged from November projections. These adjustments also take into consideration the expectation that U.S. export prices for butter will maintain their competitiveness in the global markets, albeit at smaller margins than earlier in the year.

On a milk-fat basis, the dairy import forecast for 2025 has been revised downward 0.2 billion pounds from the previous month's forecast to 7.8 billion pounds, mainly due to lower expected butter imports. On a skim-solids basis, the dairy imports for 2025 are projected at 6.9 billion pounds, unchanged from last forecast.

Data on domestic use from January through August 2025 shows a year-over-year decline on a milk-fat basis and robust growth on a skim-solids basis. Consequently, the domestic use forecasts for 2025 have been adjusted from the previous month's projections. On a milk-fat basis, domestic use in 2025 is now projected at 222.4 billion pounds, a decrease of 0.4 billion pounds from last month's projections. Conversely, on a skim-solids basis, it is forecast at 189.2 billion pounds, an increase of 0.6 billion pounds from last month's projections.

Based on recent strength in butter prices and weakness in cheese prices, the average price forecast for butter has been revised upward 0.5 cents to \$2.225 per pound, while the 2025 average price forecast for Cheddar cheese has been revised downward 1 cent to \$1.795 per pound. The average price forecasts for dry whey and nonfat dry milk are unchanged from November projections at \$0.595 and \$1.235 per pound, respectively.

The Class III milk price for 2025 is projected to average \$18.10 per cwt, down \$0.05 from last month due to lower Cheddar cheese prices. The Class IV milk price for 2025 is forecast to average \$17.40 per cwt, up \$0.05 driven by higher butter prices. The all-milk price for 2025 is now projected at \$21.00, a decrease of \$0.05 from the previous forecast.

Recent Wholesale Dairy Product Prices

From the week ending November 8, 2025, to the week ending December 6, 2025, movements in national wholesale dairy product prices (per pound) reported in the USDA National Dairy Products Sales Report (NDPSR) were mixed. The price for 40-pound blocks of Cheddar cheese, butter, and nonfat dry milk (NDM) decreased, while the price for dry whey increased.

For the trading week ending December 5th at the Chicago Mercantile Exchange (CME), the spot prices for Cheddar cheese 500-pound barrels and 40-pound blocks averaged \$1.4645 and \$1.4095 per pound, respectively. CME spot prices for butter, NDM, and dry whey averaged \$1.4635, \$1.1555, and \$0.7365 per pound, respectively.

For the period beginning November 24 and ending December 5, 2025, Dairy Market News (DMN) reported a decline in export prices for Oceania and European butter and skim milk powder (SMP), and an increase in prices for Oceania Cheddar and European dry whey compared to the previous period. Converting metric tons to pounds, the most recent average prices per pound are as follows: Oceania Cheddar cheese: \$2.10, Oceania SMP: \$1.15, European SMP: \$1.09, Oceania butter: \$2.55, European butter: \$2.49, and European dry whey: \$0.57.

Livestock, Dairy, and Poultry Outlook: December 2025, LDP-M-378, December 15, 2025 USDA, Economic Research Service

November 2025 Pool Summary

Classification of Producer Milk

	Pounds	Percent
Class I	595,115,716	39.5
Class II	378,635,034	25.2
Class III	309,817,109	20.6
Class IV	221,300,179	14.7
Total	1,504,868,038	100.0

Producer Prices

Producer Price Differential	\$(0.66) / cwt
Butterfat Price	1.7061 / lb
Protein Price	3.0143 / lb
Other Solids Price	0.3859 / lb
Somatic Cell Adjustment Rate	0.00087 / cwt
Statistical Uniform Price	16.52 / cwt

ANNOUNCEMENT OF PRODUCER PRICES

Federal Order No. 33

NOVEMBER 2025

MIDEAST MARKETING AREA

COMPUTATION OF PRODUCER PRICE DIFFERENTIAL

	<u>POUNDS</u>	<u>BUTTERFAT</u>	<u>SKIM / PROTEIN</u>	<u>NONFAT SOLIDS</u>	<u>OTHER SOLIDS</u>	<u>PRICE</u>	<u>VALUE</u>
Class I Skim Value			581,348,113			\$14.42 / cwt	\$83,830,397.89
Class I Butterfat		13,767,603				1.8963 / lb	26,107,505.57
Class I Location Differential	595,115,716						(1,384,017.46)
Class II SNF Value				33,994,159		0.9833 / lb	33,426,456.57
Class II Butterfat		26,227,018				1.7131 / lb	44,929,504.57
Class III Protein Value			10,577,865			3.0143 / lb	31,884,858.47
Class III Other Solids Value					17,759,871	0.3859 / lb	6,853,534.23
Class III Butterfat		15,617,638				1.7061 / lb	26,645,252.21
Class IV SNF Value				20,257,336		0.9124 / lb	18,482,793.38
Class IV Butterfat		11,163,619				1.7061 / lb	19,046,250.37
Somatic Cell Value II/III/IV							1,499,224.40
TOTAL PRODUCER MILK VALUE	1,504,868,038	66,775,878	51,733,093	138,565,487	86,832,394		\$291,321,760.20
TOTAL ADJUSTMENTS							\$391,658.10
TOTAL HANDLER OBLIGATIONS							\$291,713,418.30
Total Protein Value			51,733,093			3.0143 / lb	\$155,939,062.23
Total Other Solids Value					86,832,394	0.3859 / lb	33,508,620.84
Butterfat Value		66,775,878				1.7061 / lb	113,926,325.46
Total Somatic Cell Values							2,448,278.94
TOTALS							(\$14,108,869.17)
Net Producer Location Adjustments							\$3,933,035.56
1/2 Unobligated Balance Producer Settlement Fund							866,000.00
Total - Divided by Total Pounds	1,504,875,212					(\$0.618645)	(\$9,309,833.61)
Rate of Cash Reserve						(0.041355)	(622,342.80)
PRODUCER PRICE DIFFERENTIAL at Cuyahoga County, OH ¹						(\$0.66) / cwt	(\$9,932,176.41)

COMPONENT PRICES

November

	<u>2025</u>	<u>2024</u>
Butterfat Price	\$1.7061 / lb	\$3.0623 / lb
Protein Price	3.0143 / lb	2.3160 / lb
Other Solids Price	0.3859 / lb	0.4049 / lb
Somatic Cell Adjustment Rate	0.00087 / cwt	0.00096 / cwt
Nonfat Solids Price ²	0.9124 / lb	1.1974 / lb

COMPUTATION OF UNIFORM PRICE

November

	<u>2025</u>	<u>2024</u>
Class III Price - 3.5% BF	\$17.18	\$19.95
Producer Price Differential*	(0.66)	1.60
Statistical Uniform Price	\$16.52	\$21.55

CLASS PRICES

November

	<u>2025</u>	<u>2024</u>
Class I*	\$20.55	\$24.53
Class II	14.54	21.52
Class III	17.18	19.95
Class IV	13.89	21.12

CLASSIFICATION OF PRODUCER MILK

November

	<u>2025</u>	<u>2024</u>
	<i>Product lbs.</i>	<i>Product lbs.</i>
Class I	595,115,716	599,497,979
Class II	378,635,034	321,128,652
Class III	309,817,109	659,327,325
Class IV	221,300,179	181,629,521
Total	1,504,868,038	1,761,583,477

¹ Subject to Location Adjustment.

² Producers are not paid on this component.

ORDER 33 MARKET SUMMARY

The Producer Price Differential for the Mideast Marketing Area for November 2025 was -\$0.66 and the Statistical Uniform Price was \$16.52 for the month. The Statistical Uniform Price is \$0.95 lower than last month and is \$5.03 lower than November 2024. The Producer Butterfat Price of \$1.7061 per pound decreased \$0.1191 from October and is down \$1.3562 from a year ago. The Protein Price of \$3.0143 is up \$0.1382 from last month and is up \$0.6983 from November 2024. The Other Solids Price in November was \$0.3859 per pound, an increase from last month's price of \$0.3360 and \$0.019 lower than last November. The Somatic Cell Adjustment rate for November was \$0.00087 per cwt.

November producer receipts of 1.50 billion pounds were 25.3 percent lower than October and 17.1 percent lower than November 2024 production of 1.50 billion pounds. Producer milk allocated to Class I accounted for 39.5 percent of the total producer milk in November 2025, lower than 32.1 percent in October, and lower than 34.0 percent in November 2024. A total of 3,255 producers were pooled on the Mideast Order compared to 3,400 producers pooled in November 2024. The market average content of producer milk was as follows: Butterfat 4.44%; Protein 3.44%; Other Solids 5.77% and Nonfat Solids 9.21%.

October Milk Production Up 3.9 Percent

Milk production in the 24 major States during October totaled 18.7 billion pounds, up 3.9 percent from October 2024. September revised production, at 18.2 billion pounds, was up 4.0 percent from September 2024. The September revision represented a decrease of 34 million pounds or 0.2 percent from last month's preliminary production estimate. Production per cow in the 24 major States averaged 2,049 pounds for October, 30 pounds above October 2024. The number of milk cows on farms in the 24 major States was 9.14 million head, 211,000 head more than October 2024, but 7,000 head less than September 2025.

The Mideast Marketing Area has four states represented in the 24 major states used above. They are Indiana, Michigan, Ohio, and Pennsylvania. Milk production in these Mideast states during October totaled 2.72 billion pounds, up 51 million pounds or 1.9 percent from October 2024. Production per cow in the Mideast states averaged 2,030 pounds for October, 9 pounds more than October 2024. The number of cows on farms in the Mideast states was 1.36 million head, 20,000 head more than October 2024.

*Released November 21, 2025, by the National Agricultural Statistics Service (NASS),
Agricultural Statistics Board, United States Department of Agriculture (USDA).*

Dry milk products (comparisons in percentage with October 2024)
Nonfat dry milk, human - 123 million pounds, down 1.5 percent.
Skim milk powder - 35.0 million pounds, down 12.1 percent.

Whey products (comparisons in percentage with October 2024) Dry whey, total - 67.7 million pounds, up 2.1 percent. Lactose, human and animal - 90.2 million pounds, down 1.5 percent. Whey protein concentrate, total - 40.3 million pounds, down 1.7 percent.

Frozen products (comparisons in percentage with October 2024) Ice cream, regular (hard) - 60.9 million gallons, down 3.0 percent. Ice cream, lowfat (total) - 32.2 million gallons, down 2.2 percent. Sherbet (hard) - 1.90 million gallons, up 19.3 percent. Frozen yogurt (total) - 2.91 million gallons, down 2.9 percent.

*Released December 15, 2025, by the National Agricultural Statistics Service (NASS),
Agricultural Statistics Board, United States Department of Agriculture (USDA).*

Bulletin WebPage Edition

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Featured this month are:

- Producer Milk Classification
- Statistical Uniform Price
- Class and Component Prices
- National Product Prices

Weighted Averages - Butterfat, Protein, Other Solids, Somatic Cell Count by State											
Federal Order No. 33											
October 2025							October 2024				
-----Weighted Averages -----							-----Weighted Averages -----				
State	Number of Producers	Pounds of Milk (000)	Butterfat	Protein	Other Solids	SCC (000)	Pounds of Milk (000)	Butterfat	Protein	Other Solids	SCC (000)
Michigan	695	1,020,338	4.33	3.35	5.79	165	852,224	4.21	3.30	5.78	165
Ohio	1,117	425,626	4.32	3.38	5.76	194	396,532	4.14	3.28	5.70	192
Indiana	570	276,659	4.21	3.29	5.71	191	268,697	4.21	3.32	5.83	204
Pennsylvania	622	78,285	4.27	3.29	5.64	223	75,908	4.18	3.25	5.65	232
New York	116	64,337	4.55	3.41	5.85	161	50,149	4.50	3.38	5.88	192
Other	138	20,310	4.34	3.37	5.71	228	36,749	4.35	3.31	5.73	192
Total/Average *	3,258	1,885,555	4.31	3.35	5.77	178	1,680,260	4.20	3.30	5.76	182
* Totals may not add due to rounding. Data provided on a one-month delay basis and includes only milk from the states <i>pooled</i> on the Mideast order.											



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**FEDERAL ORDER DATA
November 2025**

Marketing Area ^{1/}		Producer Milk		Class I	Producer	Statistical
		Total	Class I	Percent	Price Differential	Uniform Price
		(000)	(000)	%	(per cwt.)	(per cwt.)
FO 1	Northeast - (<i>Boston</i>)	2,214,761	648,887	29.3	0.17	\$17.35
FO 5	Appalachian - (<i>Charlotte</i>)	417,417	304,025	72.8	^{2/}	20.45
FO 6	Florida - (<i>Tampa</i>)	212,424	167,332	78.8	^{2/}	21.50
FO 7	Southeast - (<i>Atlanta</i>)	274,155	208,344	76.0	^{2/}	20.82
FO 30	Upper Midwest - (<i>Chicago</i>)	1,236,211	160,419	13.0	-0.56	16.62
FO 32	Central - (<i>Kansas City</i>)	811,973	345,684	42.6	-1.35	15.83
FO 33	Mideast - (<i>Cleveland</i>)	1,504,868	595,116	39.5	-0.66	16.52
FO 51	California - (<i>Los Angeles</i>)	1,794,215	382,322	21.3	-2.42	14.76
FO 124	Pacific Northwest - (<i>Seattle</i>)	504,362	125,063	24.8	-1.80	15.38
FO 126	Southwest - (<i>Dallas</i>)	815,973	328,895	40.3	-1.33	15.85
FO 131	Arizona - (<i>Phoenix</i>)	333,801	113,328	34.0	^{2/}	15.96

^{1/} Names in parentheses are principal points of markets.

^{2/} Producers in these markets are paid on the basis of a uniform skim and butterfat price.

MINIMUM PARTIAL PAYMENT PRICE FOR DECEMBER 2025\$13.89/cwt.

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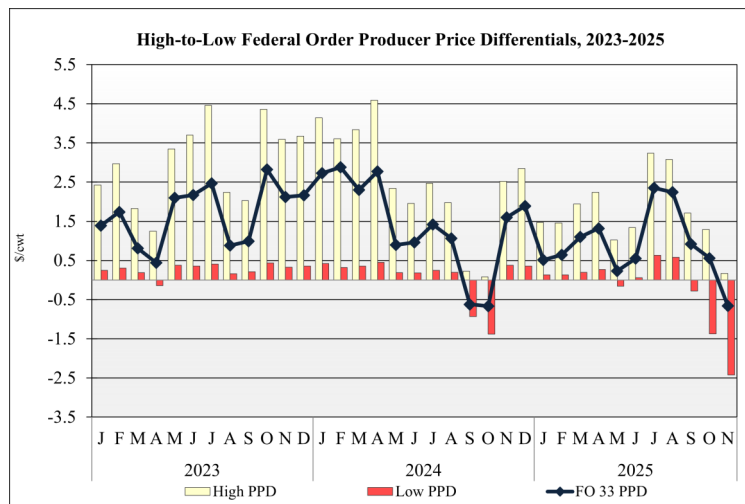


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Federal Order No. 33

Supplement
December 2025

PRODUCER PRICE DIFFERENTIAL AND UNIFORM PRICE STATISTICS 2/ 3/

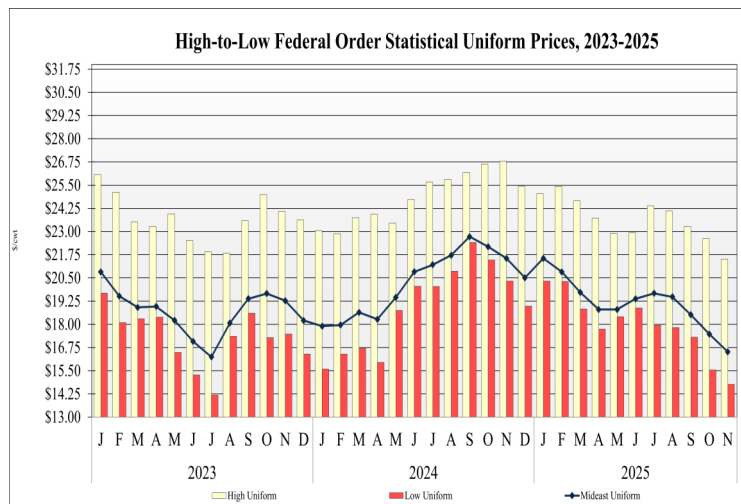


Producers in Orders 1, 30, 32, 33, 51, 124, and 126 are paid based on component pricing.

Of those orders, Federal Order 1 traditionally has the highest producer price differential. For November 2025 Federal Order 1 had a PPD of \$0.17 per hundredweight (cwt), \$1.12 lower than their October 2025 PPD.

In November 2025, Federal Order 33 had the third highest PPD, behind Order 1 and Order 30 respectively, at -\$0.66 per cwt, \$1.22 per cwt lower than their October 2025 PPD.

For November 2025, Federal Order 51 had the lowest PPD at -\$2.42 per cwt, \$1.05 lower than their October 2025 PPD.



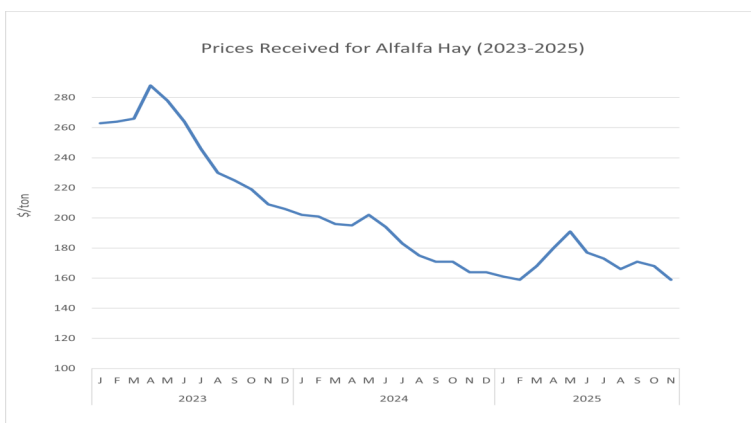
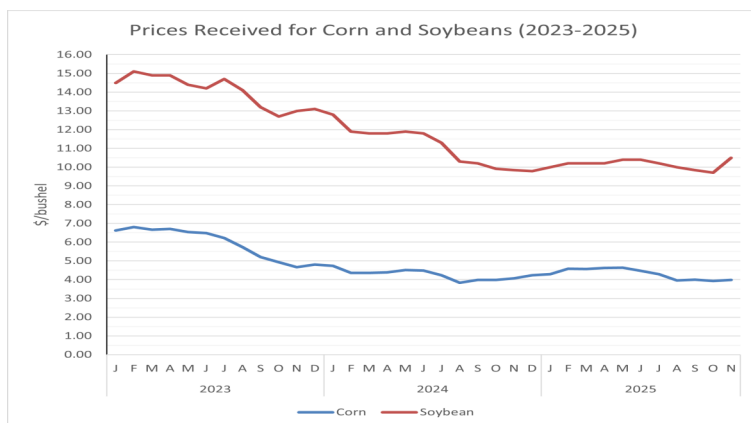
Producers in Orders 1, 30, 32, 33, 51, 124, and 126 are paid based on component pricing; and producers in 5, 6, 7 and 131 are paid based on skim-fat pricing. The table above details the range of statistical uniform prices (SUP) paid to producers.

Of those orders, Federal Order 6 (Florida) traditionally has the highest statistical uniform price. For November 2025, Federal Order 6 had a SUP of \$21.50 per cwt, 1.12 lower than their October 2025 SUP.

For November 2025, Federal Order 33 had a SUP of \$16.52 per cwt, \$0.95 per cwt lower than their October 2025 SUP.

For November 2025, Federal Order 51 had the lowest SUP at \$14.76 per cwt, \$0.78 per cwt lower than their October 2025 SUP.

PRICES RECEIVED FOR GRAIN AND ALFALFA HAY 4/



2/ Producer price differentials are subject to location adjustment.

3/ Statistical uniform prices are at 3.5 percent butterfat and subject to location adjustment.

4/ Source: USDA, National Agricultural Statistics Service