

Mideast Market Administrator's Bulletin

Federal Order No. 33

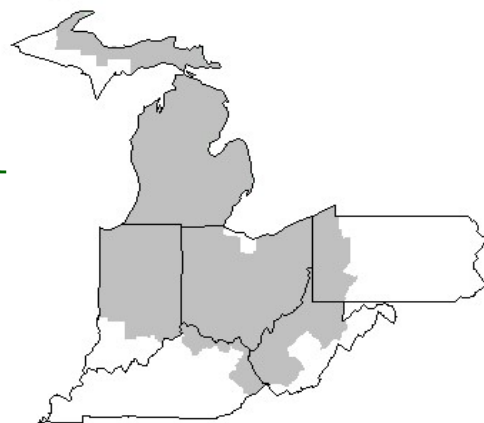
Scott C. Jones, Market Administrator

Phone: (330) 225-4758 Toll Free: (888) 751-3220

Email: mideastorder@fmmaclev.com

WebPage: www.fmmaclev.com

MAY 2025



Dairy Forecasts for 2025

The 2025 dairy herd size forecast is 9.405 million head, which is 25,000 head higher than the previous month's projection. An anticipated higher milk yield per cow throughout the year has led to an increase of 10 pounds per cow, which is now forecast at 24,130 pounds per head. Consequently, the revised milk production forecast for 2025 is 226.9 billion pounds, an increase of 0.7 billion pounds from the previous month's estimate and 1.0 billion pounds higher than 2024.

Dairy import forecasts were adjusted lower from last month's forecast mainly due to the imposition of additional duties on imported dairy products. On a milk-fat basis, dairy import projections in 2025 were lowered to 8.5 billion pounds (-0.4 billion), while on a skim-solids basis imports were lowered to 6.7 billion pounds (-0.3 billion). Notably, lower expected import volumes of cheese, butter, and infant formula are anticipated for 2025.

The 2025 dairy export forecast changes are mixed from the previous forecast. The milk-fat basis forecast has been raised by 0.1 billion pounds to 11.8 billion as shipments of butter, whole milk powder, and cream are expected to increase. Conversely, on a skim-solids basis, the export forecast was lowered to 44.6 billion pounds (-2.9 billion) as shipment decreases are anticipated for dry skim milk, dry whey products, and lactose.

Stocks are expected to be higher than the previous month's forecast in 2025. By the end of the year, ending stocks are projected to increase by 0.2 billion pounds on a fat basis, and by 0.3 billion pounds on a skim-solids basis. While domestic use for 2025 is unchanged from last month's forecast at 223.1 billion pounds on a milk-fat basis, the domestic use forecast on a skim-solids basis was raised by 3.0 billion pounds to 187.3 billion pounds.

Based on recent lower price trends, the adjusted forecasts, in dollars per pound for dairy products, are as follows: Cheddar cheese \$1.790 (-2.0 cents), dry whey \$0.510 (-1.50 cents), butter \$2.445 (-7.0 cents), and NDM \$1.220 (-3.5 cents).

With lower cheese and dry whey prices, the new forecast for Class III milk is \$17.60 per hundredweight, \$0.35 lower than the previous forecast. With lower butter and NDM price projections, the Class IV price forecast has been lowered to \$18.20 per hundredweight, \$0.60 lower than the previous projection. The all-milk price for 2025 is now forecast at \$21.10 per hundredweight, down \$0.50 from last month's forecast.

Production of Milkfat and Skim Solids Grow

According to the most recent Milk Production report published by the USDA, National Agricultural Statistics Service (NASS), the national dairy herd, cow productivity, and milk production grew in February. The average number of cows in February was 9.405 million head, about 62,000 more than in February 2024. This was the fifth consecutive month of steady year-over-year growth in dairy livestock inventory. NASS milk per cow estimate for February 2025 was 1,885 pounds, about 0.32 percent higher than in February 2024 (after accounting for leap year). Driven by both a higher number of cows and higher productivity, the February milk production was estimated at 17.725 billion pounds, about 1 percent year-over-year higher when accounting for the 2024 extra leap year day.

In each of the first 2-month periods of 2025, milk production on a per day basis was year-over-year higher. Additionally, the milk-fat and nonfat skim solids test percentages per milk volume continued to increase. Consequently, the production of milk fat and nonfat skim solids grew at a faster pace than the milk production.

Ending stocks in February were year-over-year lower on a milk-fat basis (-5.0 percent) and higher on a skim-solids basis (+6.3 percent). Ending stocks in February were year-over-year lower for most dairy products with butter and dry skim milk products as the exceptions.

Livestock, Dairy, and Poultry Outlook: April 2025, LDP-M-370, April 16, 2025

April 2025 Pool Summary

Classification of Producer Milk

	Pounds	Percent
Class I	511,520,173	33.5
Class II	132,772,925	8.7
Class III	678,308,987	44.4
Class IV	206,385,712	13.5
Total	1,528,987,797	100.0

Producer Prices

Producer Price Differential	\$1.32 / cwt
Butterfat Price	2.6406 / lb
Protein Price	2.1682 / lb
Other Solids Price	0.3087 / lb
Somatic Cell Adjustment Rate	0.00087 / cwt
Statistical Uniform Price	18.80 / cwt

ANNOUNCEMENT OF PRODUCER PRICES

Federal Order No. 33
APRIL 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			499,501,592			\$12.75	/ cwt	\$63,686,452.98
Class I Butterfat		12,018,581				2.6484	/ lb	31,830,009.92
Class I Location Differential	511,520,173							(234,246.39)
Class II SNF Value				11,132,339		1.1456	/ lb	12,753,207.54
Class II Butterfat		15,628,894				2.6476	/ lb	41,379,059.75
Class III Protein Value			22,633,648			2.1682	/ lb	49,074,275.62
Class III Other Solids Value					39,488,493	0.3087	/ lb	12,190,097.81
Class III Butterfat		25,530,474				2.6406	/ lb	67,415,769.64
Class IV SNF Value				18,451,321		0.9994	/ lb	18,440,250.21
Class IV Butterfat		12,865,325				2.6406	/ lb	33,972,177.18
Somatic Cell Value II/III/IV								1,692,303.19
TOTAL PRODUCER MILK VALUE	1,462,944,523	66,043,274	50,613,950	139,170,201	88,556,251			\$332,199,357.45
Overages								371,338.15
Beginning Inventory & OS Charges								(33,383.73)
TOTAL ADJUSTMENTS								\$337,954.42
TOTAL HANDLER OBLIGATIONS								\$332,537,311.87
Total Protein Value			50,613,950			2.1682	/ lb	\$109,741,166.39
Total Other Solids Value				88,556,251		0.3087	/ lb	27,337,314.68
Butterfat Value		66,043,274				2.6406	/ lb	174,393,869.32
Total Somatic Cell Values								2,472,194.22
TOTALS								\$18,592,767.25
Net Producer Location Adjustments								\$1,431,668.04
1/2 Unobligated Balance Producer Settlement Fund								821,000.00
Total - Divided by Total Pounds	1,529,018,653					\$1.363321		\$20,845,435.29
Rate of Cash Reserve						(0.043321)		(662,389.08)
PRODUCER PRICE DIFFERENTIAL at Cuyahoga County, OH ¹						\$1.32	/ cwt	\$20,183,046.21

COMPONENT PRICES

	April	
	2025	2024
Butterfat Price	\$2.6406 / lb	\$3.3309 / lb
Protein Price	2.1682 / lb	0.8345 / lb
Other Solids Price	0.3087 / lb	0.2367 / lb
Somatic Cell Adjustment Rate	0.00087 / cwt	0.00077 / cwt
Nonfat Solids Price ²	0.9994 / lb	0.9730 / lb

COMPUTATION OF UNIFORM PRICE

	April	
	2025	2024
Class III Price - 3.5% BF	\$17.48	\$15.50
Producer Price Differential*	1.32	2.77
Statistical Uniform Price	\$18.80	\$18.27

CLASS PRICES

	April	
	2025	2024
Class I*	\$21.57	\$21.18
Class II	19.22	21.23
Class III	17.48	15.50
Class IV	17.92	20.11

CLASSIFICATION OF PRODUCER MILK

	April	
	2025	2024
	Product lbs.	Product lbs.
Class I	511,520,173	531,506,579
Class II	132,772,925	102,304,900
Class III	678,308,987	675,053,779
Class IV	206,385,712	27,266,915
Total	1,528,987,797	1,336,132,173

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 April 2025 was \$1.32 and the Statistical Uniform Price was \$18.80 for the month. The Statistical Uniform Price is \$0.92 lower than last month and is \$0.53 higher than April 2024. The Producer Butterfat Price of \$2.6406 per pound increased \$0.0164 from March and is down \$0.6903 from a year ago. The Protein Price of \$2.1682 is down \$0.2924 from last month and is up \$1.3337 from April 2024. The Other Solids Price in April was \$0.3087 per pound, a decrease from last month's price of \$0.3647 and \$0.072 higher than last April. The Somatic Cell Adjustment rate for April was \$0.00087 per cwt. April producer receipts of 1.53 billion pounds were 13.9 percent lower than March and 14.4 percent higher than April 2024 production of 1.34 billion pounds. Producer milk allocated to Class I accounted for 33.5 percent of the total producer milk in April 2025, higher than 33.1 percent in March, and lower than 39.8 percent in April 2024. A total of 3,267 producers were pooled on the Mideast Order compared to 3,371 producers pooled in April 2024.

The market average content of producer milk was as follows: Butterfat 4.32%; Protein 3.31%; Other Solids 5.79% and Nonfat Solids 9.10%.

March Milk Production Up 1.0 Percent

Milk production in the 24 major States during March totaled 19.0 billion pounds, up 1.0 percent from March 2024. February revised production, at 17.0 billion pounds, was down 2.4 percent from February 2024. The February revision represented an increase of 26 million pounds or 0.2 percent from last month's preliminary production estimate. Production per cow in the 24 major States averaged 2,125 pounds for March, 4 pounds above March 2024. The number of milk cows on farms in the 24 major States was 8.96 million head, 72,000 head more than March 2024, and 9,000 head more than February 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 March totaled 2.8 billion pounds, up 21 million pounds or 0.8 percent from March 2024. Production per cow in the Mideast states averaged 2,103 pounds for March, 14 pounds more than March 2024. The number of cows on farms in the Mideast states was 1.4 million head, 1,000 head more than March 2024.

*Released April 22, 2025, by the National Agricultural Statistics Service (NASS),
Agricultural Statistics Board, United States Department of Agriculture (USDA).*

Dry milk products (comparisons in percentage with March 2024)
Nonfat dry milk, human - 168 million pounds, down 9.1 percent.
Skim milk powder - 34.0 million pounds, down 11.9 percent.

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Frozen products (comparisons in percentage with March 2024)
Ice cream, regular (hard) - 60.4 million gallons, down 7.9 percent.
Ice cream, lowfat (total) - 35.4 million gallons, down 8.9 percent.
Sherbet (hard) - 1.47 million gallons, down 16.2 percent.
Frozen yogurt (total) - 3.74 million gallons, up 6.1 percent.

Featured this month are:

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

Released May 6, 2025, by the National Agricultural Statistics Service (NASS),
Agricultural Statistics Board, United States Department of Agriculture (USDA).

Weighted Averages - Butterfat, Protein, Other Solids, Somatic Cell Count by State
Federal Order No. 33

March 2025							March 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	707	870,307	4.39	3.36	5.81	153	719,147	4.24	3.29	5.78	153
Ohio	1,132	410,778	4.37	3.36	5.78	167	386,754	4.13	3.24	5.73	173
Indiana	576	290,850	4.28	3.27	5.72	170	239,112	4.25	3.32	5.90	186
Pennsylvania	628	81,367	4.22	3.21	5.69	188	80,038	4.18	3.18	5.69	194
New York	113	46,733	4.65	3.44	5.92	151	28,024	4.53	3.39	5.98	179
Other	156	42,022	4.37	3.34	5.81	170	67,692	4.29	3.31	5.78	153
Total/Average *	3,312	1,742,057	4.36	3.34	5.79	161	1,520,767	4.22	3.28	5.78	166

* Totals may not add due to rounding. Data provided on a one-month delay basis and includes only milk from these states *pooled* on the Mideast order.



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FEDERAL ORDER DATA

April 2025

<u>Marketing Area</u> ^{1/}		<u>Producer Milk</u>		<u>Class I</u>	<u>Producer</u>	<u>Statistical</u>
		<u>Total</u>	<u>Class I</u>	<u>Percent</u>	<u>Price Differential</u>	<u>Uniform Price</u>
		(000)	(000)	%	(per cwt.)	(per cwt.)
FO 1	Northeast - (Boston)	2,326,497	641,812	27.6	\$2.24	\$19.72
FO 5	Appalachian - (Charlotte)	452,717	301,094	66.5	^{2/}	21.72
FO 6	Florida - (Tampa)	214,215	168,837	78.8	^{2/}	23.71
FO 7	Southeast - (Atlanta)	310,231	220,026	70.9	^{2/}	22.29
FO 30	Upper Midwest - (Chicago)	2,583,670	159,150	6.2	0.27	17.75
FO 32	Central - (Kansas City)	1,366,156	341,237	25.0	0.79	18.27
FO 33	Mideast - (Cleveland)	1,528,988	511,520	33.5	1.32	18.80
FO 51	California - (Los Angeles)	3,271,406	385,897	11.8	0.89	18.37
FO 124	Pacific Northwest - (Seattle)	683,318	118,734	17.4	0.72	18.20
FO 126	Southwest - (Dallas)	1,396,874	323,656	23.2	1.57	19.05
FO 131	Arizona - (Phoenix)	388,200	112,397	29.0	^{2/}	19.25

^{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 MAY 2025.....\$17.48 /cwt.

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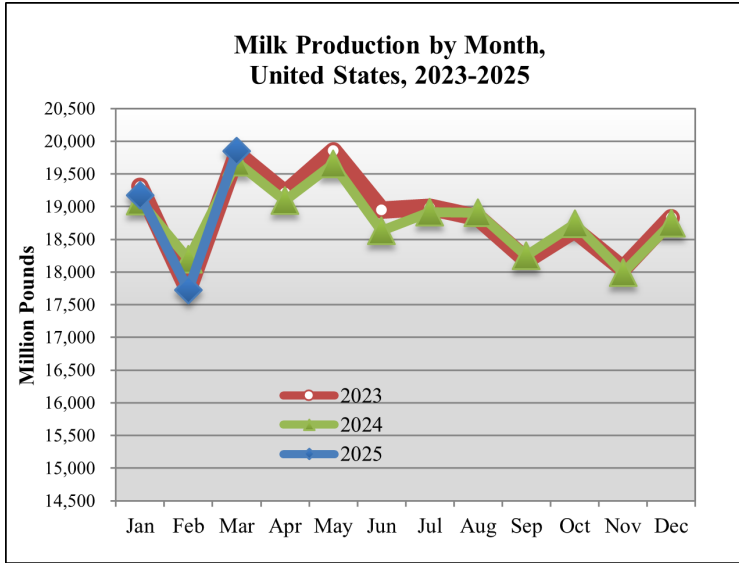


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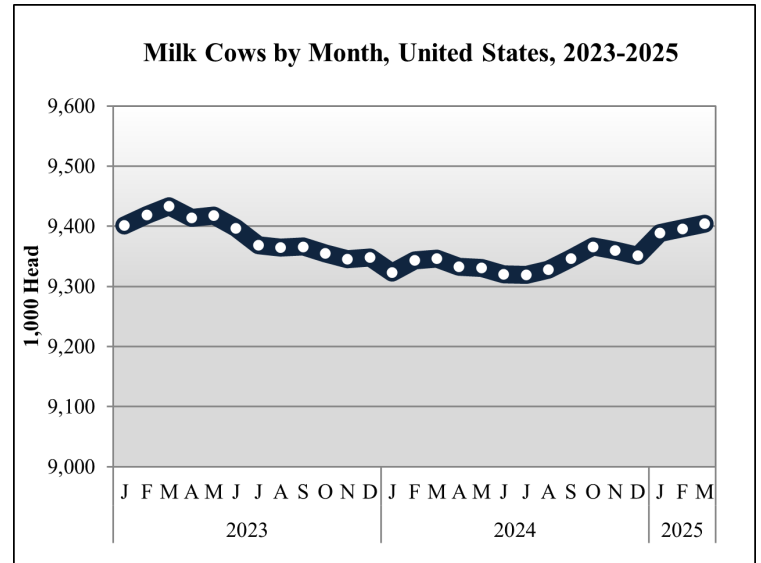
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Supplement
May 2025

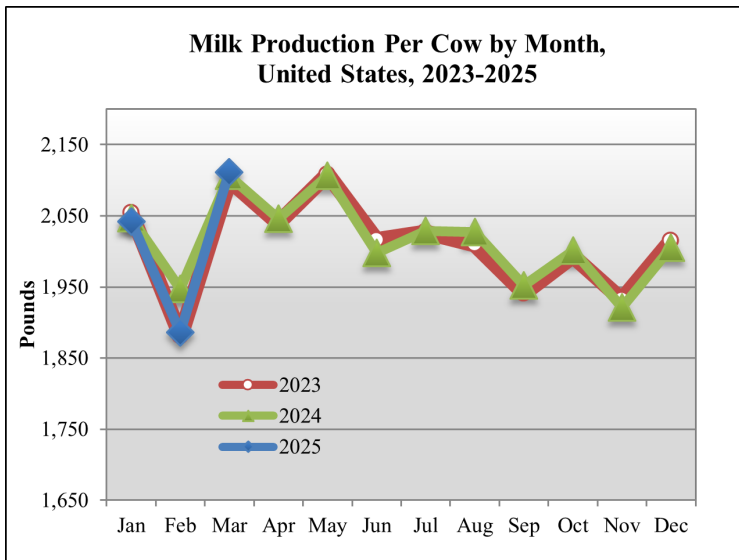
MILK PRODUCTION STATISTICS 1/



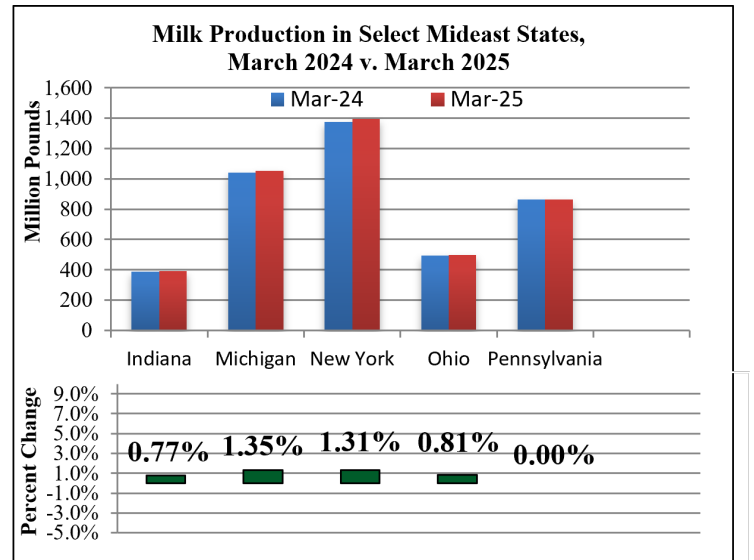
March 2025 milk production in the United States increased 2,123 million pounds from February 2025 to 19.8 billion pounds. March 2025 milk production in the United States was up 0.88% percent from the same month of the prior year.



The number of milk cows on farms in the United States was 9.4 million head for March 2025, up 8,000 head from February 2025 and up 57,000 head from March 2024.



Production per cow in the United States averaged 2,111 pounds for March 2025 up 225 pounds from February 2025. March 2025 milk production per cow was up 6 pounds from the same month of the prior year.

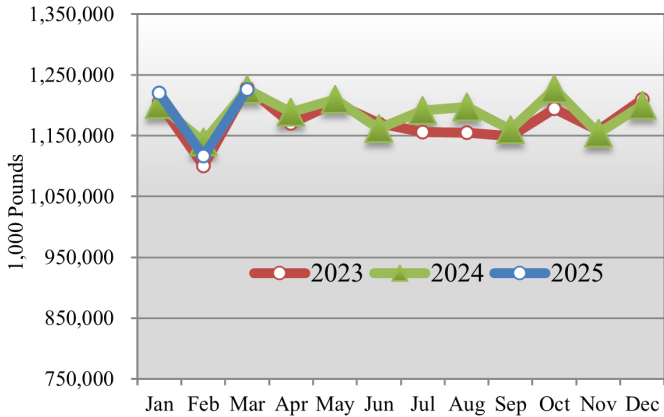


Milk production from selected states which pool on the Mideast marketing area totaled 4.2 billion pounds during March 2025, up 39 million pounds from the prior year.

1/ Source: National Agricultural Statistics Service (NASS), Agriculture Statistics Board, United States Department of Agriculture (USDA). Gaps in data in figures is due to NASS suspension of select data to meet sequestration requirements.

DAIRY PRODUCT PRODUCTION 1/

Total Cheese Production, 2023-2025



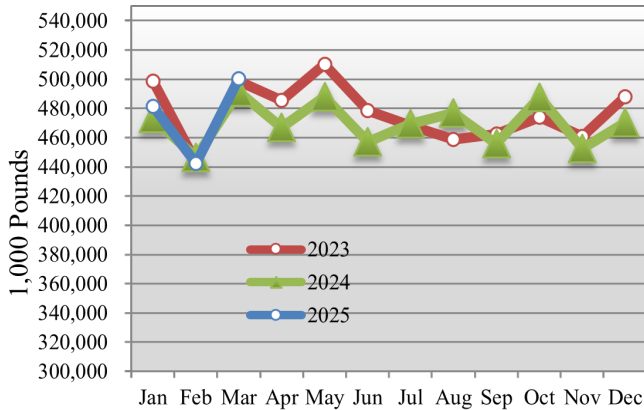
Dairy Product Production Summary:

American type cheese production totaled 500 million pounds, 4.6 percent above March 2024 and 13.0 percent above February 2025.

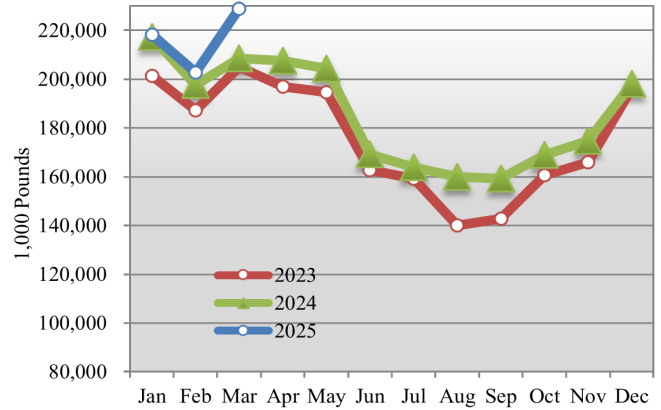
Total cheese output (excluding cottage cheese) was 1.2 billion pounds, 1.4 percent above March 2024 and 9.8 percent above February 2025.

Butter production was 229 million pounds, 8.6 percent above March 2025 and 12.9 percent above February 2025.

Total American Cheese Production, 2023-2025



Total Butter Production, 2023-2025



COMMERCIAL DISAPPEARANCE 2/

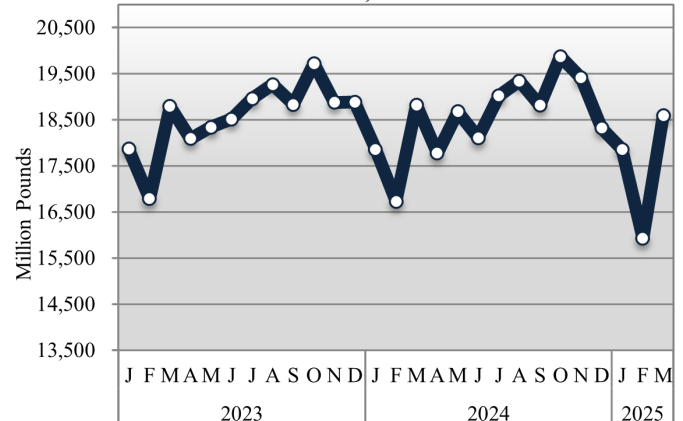
Commercial disappearance of milk in all productions represents the difference between the beginning monthly milk supply and the ending commercial stocks. Milk supply includes farm production, beginning inventory, imports and excludes milk used on the farm.

For March 2025 commercial disappearance of milk was 18.6 billion pounds, down 1.7 percent from the prior year. The cumulative disappearance total for 2025 is 52.4 billion pounds, a decrease of 1.9 percent from the same 3-month period of 2024.

March 2025 commercial disappearance of American cheese was 465 million pounds, up 1.6 percent from the prior year.

March 2025 commercial disappearance of butter was 210 million pounds, up 2.9 percent from the prior year.

Commercial Disappearance of Milk in All Products, 2023-2025



1/ Source: National Agricultural Statistics Service (NASS), Agricultural Statistics Board, United States Department of Agriculture (USDA).

2/ Sources: NASS, ERS, FAS, FSA, Bureau of Census, and ERS calculations.