

Mideast Market Administrator's Bulletin

Federal Order No. 33

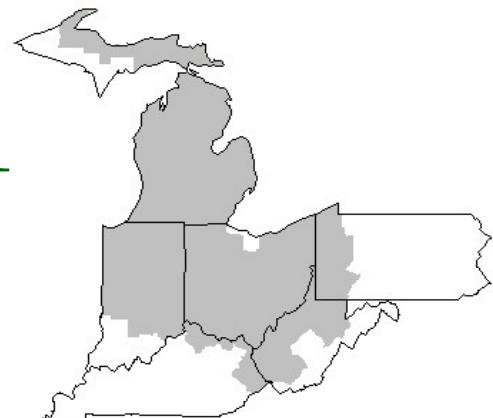
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OCTOBER 2025



Dairy Forecast for 2026

Lower expected feed costs in the second half of 2025 could support further expansion of the number of milk cows in 2026. The higher forecast for the dairy herd in 2025 is projected to extend into 2026, averaging 9.475 million head, 5,000 more than the last month's projection. The yield per cow is also revised upward by 85 pounds to 24,415 pounds. Milk production for 2026 is projected at 231.3 billion pounds, 0.9 billion pounds higher than last month's forecast.

The dairy import forecasts for 2026 have been revised downward from the previous month's forecast to 8.3 (-0.6) billion pounds on a milk-fat basis, and to 7.1 (-0.1) billion pounds on a skim-solid basis. Declines in imports are anticipated to continue across most dairy products in 2026.

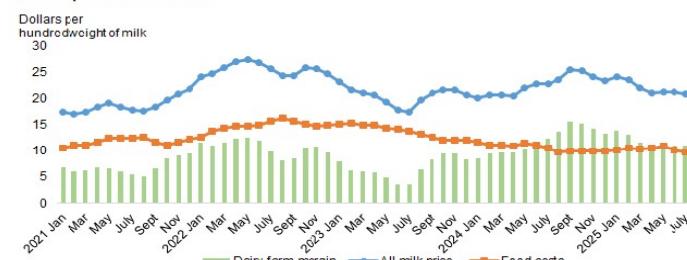
Exports forecasts for 2026 are revised upward from the previous forecast on a milk-fat basis but are unchanged on a skim-solids basis. On a milk-fat basis, dairy export volumes are forecast at 13.9 (+1.1) billion pounds, while on a skim-solids basis, exports are projected at 48.9 billion pounds. The forecast revisions are supported by higher expected exports across most dairy products except for SMP/NDM and lactose.

The domestic use forecast for 2026 is raised on a skim-solids basis and decreased on a milk-fat basis from the last forecast. On a milk-fat basis, domestic use is projected at 224.6 (-1.0) billion pounds. On a skim-solids basis, domestic use is forecast at 188.9 billion pounds, 1.8 billion pounds higher than last month's projection.

With higher expected milk production, the 2026 forecasts for wholesale dairy product prices are revised lower. The adjusted wholesale dairy product price forecasts for 2026, in dollars per pound, are as follows: Cheddar cheese \$1.775 (-3.5 cents), butter \$2.245 (-30.5 cents), NDM \$1.220 (-3.5 cents), and dry whey \$0.510 (-0.5 cents).

The revised 2026 forecast for Class III milk is \$17.40 per cwt, \$0.45 lower than the previous forecast while the Class IV price is forecast at \$17.25 per cwt, \$1.60 lower than the previous projection. The all-milk price for 2026 is now forecast at \$20.40 per cwt, down \$1.50 from last month's forecast.

All-milk price vs. feed costs



Source: USDA, Economic Research Service using information from USDA, Farm Service Agency, Dairy Margin Coverage Program.

Herd Expansion Continues, Butterfat Exports Surge

Despite low replacement heifer availability, the dairy herd has continued its expansion in 2025. According to the USDA's National Agricultural Statistics Service (NASS), U.S. milk production totaled 19.570 billion pounds in July 2025 representing a 3.4-percent increase over July 2024. Milk cows on farms averaged 9.485 million head in July, up 159,000 head from the same month last year and 10,000 head above the previous month. The average milk production per cow was 2,063 pounds, up 34 pounds from July 2024.

U.S. dairy exports on a milk-equivalent (m.e.) milk-fat basis reached a record high for any month, totaling 1,602 million pounds, an increase of 556 million pounds (+53.2 percent) from July 2024. On a m.e. skim solids basis, July exports totaled 4,353 million pounds, up 1.8 percent compared to July 2024. Notable year-over-year increases in July 2025 exports included cheese, butter, dry whey products, and lactose, while skim milk products experienced notable declines.

Over the past decade, dry skim milk products have led U.S. dairy exports, consistently exhibiting higher volumes than other products. However, after reaching a record high in May 2021, dry skim milk products exports have been on a general downward trend. In contrast, cheese exports have shown a steady and significant increase. Mexico remains the main destination for U.S. cheese. Dry whey exports have followed a flat trend over the past decade with a plurality of exports going to China. Butter exports have consistently been the lowest among these selected products in terms of volume, yet they more than doubled in 2025 compared to previous years- partly due to globally competitive pricing and increased demand from Canada.

Livestock, Dairy, and Poultry Outlook: September 2025, LDP-M-375, September 18, 2025 USDA, Economic Research Service

September 2025 Pool Summary

Classification of Producer Milk

	Pounds	Percent
Class I	587,967,382	31.9
Class II	436,385,723	23.7
Class III	613,989,294	33.3
Class IV	203,136,578	11.0
Total	1,841,478,977	100.0

Producer Prices

Producer Price Differential	\$0.92 / cwt
Butterfat Price	2.1925 / lb
Protein Price	2.7062 / lb
Other Solids Price	0.3207 / lb
Somatic Cell Adjustment Rate	0.00090 / cwt
Statistical Uniform Price	18.51 / cwt

ANNOUNCEMENT OF PRODUCER PRICES
Federal Order No. 33
September 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			574,791,942			\$13.14 / cwt	\$75,527,661.18
Class I Butterfat		13,175,440				2.8049 / lb	36,955,791.66
Class I Location Differential	587,967,382						(1,302,173.66)
Class II SNF Value				38,523,726		1.1156 / lb	42,977,068.75
Class II Butterfat		28,549,236				2.1995 / lb	62,794,044.61
Class III Protein Value			20,270,477			2.7062 / lb	54,855,964.89
Class III Other Solids Value					35,381,585	0.3207 / lb	11,346,874.30
Class III Butterfat		24,790,395				2.1925 / lb	54,352,941.09
Class IV SNF Value				18,110,622		0.9773 / lb	17,699,510.87
Class IV Butterfat		11,331,669				2.1925 / lb	24,844,684.31
Somatic Cell Value II/III/IV							1,829,588.97
TOTAL PRODUCER MILK VALUE	1,841,478,977	77,846,740	60,613,325	166,686,438	106,073,113		\$381,881,956.97
TOTAL ADJUSTMENTS							\$478,009.72
TOTAL HANDLER OBLIGATIONS							\$382,359,966.69
Total Protein Value			60,613,325			2.7062 / lb	\$164,031,780.12
Total Other Solids Value					106,073,113	0.3207 / lb	34,017,647.34
Butterfat Value		77,846,740				2.1925 / lb	170,678,977.45
Total Somatic Cell Values							2,622,160.41
TOTALS							\$11,009,401.38
Net Producer Location Adjustments							\$5,853,242.65
1/2 Unobligated Balance Producer Settlement Fund							921,000.00
Total - Divided by Total Pounds	1,841,493,129					\$0.965719	\$17,783,644.03
Rate of Cash Reserve						(0.045719)	<u>(841,907.09)</u>
PRODUCER PRICE DIFFERENTIAL at Cuyahoga County, OH ¹						\$0.92 / cwt	\$16,941,736.94

COMPONENT PRICES**COMPUTATION OF UNIFORM PRICE****September**

	<u>2025</u>	<u>2024</u>
Butterfat Price	\$2.1925 / lb	\$3.6114 / lb
Protein Price	2.7062 / lb	2.9249 / lb
Other Solids Price	0.3207 / lb	0.3430 / lb
Somatic Cell Adjustment Rate	0.00090 / cwt	0.00114 / cwt
Nonfat Solids Price ²	0.9773 / lb	1.1109 / lb

September

	<u>2025</u>	<u>2024</u>
Class III Price - 3.5% BF	\$17.59	\$23.34
Producer Price Differential*	<u>0.92</u>	<u>(0.62)</u>
Statistical Uniform Price	\$18.51	\$22.72

CLASS PRICES**September**

	<u>2025</u>	<u>2024</u>
Class I*	\$22.50	\$23.60
Class II	17.39	22.40
Class III	17.59	23.34
Class IV	16.17	22.29

CLASSIFICATION OF PRODUCER MILK**September**

	<u>2025</u>	<u>2024</u>
Product lbs.	Product lbs.	
Class I	587,967,382	568,151,223
Class II	436,385,723	374,762,451
Class III	613,989,294	485,963,939
Class IV	<u>203,136,578</u>	<u>181,495,331</u>
Total	1,841,478,977	1,610,372,944

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 September 2025 was \$0.92 and the Statistical Uniform Price was \$18.51 for the month. The Statistical Uniform Price is \$0.97 lower than last month and is \$4.21 lower than September 2024. The Producer Butterfat Price of \$2.1925 per pound decreased \$0.5330 from August and is down \$1.4189 from a year ago. The Protein Price of \$2.7062 is up \$0.7416 from last month and is down \$0.2187 from September 2024. The Other Solids Price in September was \$0.3207 per pound, an increase from last month's price of \$0.3204 and \$0.0223 lower than last September. The Somatic Cell Adjustment rate for September was \$0.00090 per cwt.

September producer receipts of 1.84 billion pounds were 0.7 percent higher than August and 14.4 percent higher than September 2024 production of 1.61 billion pounds. Producer milk allocated to Class I accounted for 31.9 percent of the total producer milk in September 2025, higher than 31.5 percent in August, and lower than 35.3 percent in September 2024. A total of 3,281 producers were pooled on the Mideast Order compared to 3,346 producers pooled in September 2024. The market average content of producer milk was as follows: Butterfat 4.23%; Protein 3.29%; Other Solids 5.76% and Nonfat Solids 9.05%.

U.S Dairy Product Wholesale Prices

From the week ending August 9, 2025, to the week ending September 6, 2025, movements in national wholesale dairy product prices (per pound) reported in the USDA National Dairy Products Sales Report (NDPSR) are mixed. The price for 40-pound blocks of Cheddar cheese and nonfat dry milk (NDM) increased, while butter and dry whey prices declined.

For the trading week ending September 12 at the Chicago Mercantile Exchange (CME), the average spot prices for Cheddar cheese 500-pound barrels and 40-pound blocks averaged \$1.6605 and \$1.6535 per pound, respectively. CME spot prices for NDM, butter, and dry whey averaged \$1.1890, \$1.9565, and \$0.5875 per pound, respectively.

For the biweekly period from September 1 to September 12, the average export prices per pound for selected dairy products- based on price ranges reported by Dairy Market News (DMN)- showed mixed movements across Oceania and Europe, with variations by product category compared to the previous biweekly report. Butter prices declined, with Europe averaging \$3.46 (down 22 cents) and Oceania at \$3.21 (down 5 cents). Skim milk powder (SMP) also saw decreases, with Europe at \$1.22 (down 4 cents) and Oceania at \$1.21 (down 9 cents). In contrast, dry whey from Europe rose to \$0.56 (up 4 cents), while Oceania Cheddar climbed to \$2.15 (up 7 cents), reflecting stronger demand in the cheese segment.

If U.S. dairy manufacturers and brokers are exporting based on NDPSR prices, Cheddar and butter show a clear international competitive advantage and may continue capitalizing on export opportunities, as reflected in strong exports so far in 2025. However, SMP faces a disadvantage under these recent pricing conditions, while dry whey prices remain broadly aligned with European levels.

Livestock, Dairy, and Poultry Outlook: September 2025, LDP-M-375, September 18, 2025 USDA, Economic Research Service

August Milk Production Up 3.3 Percent

Milk production in the 24 major States during August totaled 18.8 billion pounds, up 3.3 percent from August 2024. July revised production, at 19.0 billion pounds, was up 4.3 percent from July 2024. The July revision represented an increase of 139 million pounds or 0.7 percent from last month's preliminary production estimate. Production per cow in the 24 major States averaged 2,068 pounds for August, 28 pounds above August 2024. The number of milk cows on farms in the 24 major States was 9.08 million head, 172,000 head more than August 2024, and 7,000 head more than July 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 August totaled 2.72 billion pounds, up 51 million pounds or 1.9 percent from August 2024. Production per cow in the Mideast states averaged 2,044 pounds for August, 24 pounds more than August 2024. The number of cows on farms in the Mideast states was 1.35 million head, 9,000 head more than August 2024.

Released September 22, 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

State	Number of Producers	Pounds of Milk (000)	August 2025				August 2024					
			Weighted Averages				Weighted Averages					
			Butterfat	Protein	Other Solids	SCC (000)			Butterfat	Protein	Other Solids	SCC (000)
Michigan	694	937,602	4.14	3.22	5.79	199	790,795	4.06	3.17	5.79	181	
Ohio	1,120	423,838	4.11	3.22	5.75	239	378,592	3.99	3.13	5.68	218	
Indiana	568	287,300	4.02	3.14	5.69	237	239,806	4.06	3.19	5.82	223	
Pennsylvania	641	81,506	3.97	3.11	5.66	275	77,531	3.95	3.08	5.65	263	
New York	115	63,733	4.29	3.25	5.85	204	46,535	4.28	3.23	5.89	212	
Other	145	35,083	4.09	3.18	5.77	230	62,620	4.21	3.20	5.75	189	
Total/Average *	3,281	1,749,183	4.08	3.16	5.77	213	1,595,880	4.05	3.16	5.76	201	

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



**United States
Department of
Agriculture**

Mideast Market Administrator Bulletin

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**FEDERAL ORDER DATA
September 2025**

<u>Marketing Area</u> ^{1/}		Producer Milk	Class I	Producer	Statistical	
		Total (000)	Class I (000)	Percent %	Price Differential (per cwt.)	Uniform Price (per cwt.)
FO 1	Northeast - (Boston)	2,265,078	668,477	29.5	1.71	\$19.30
FO 5	Appalachian - (Charlotte)	402,955	312,255	77.5	2/	22.29
FO 6	Florida - (Tampa)	208,623	168,777	80.9	2/	23.28
FO 7	Southeast - (Atlanta)	263,395	210,106	79.8	2/	22.72
FO 30	Upper Midwest - (Chicago)	2,083,525	162,990	7.8	0.35	17.94
FO 32	Central - (Kansas City)	1,195,806	351,735	29.4	0.64	18.23
FO 33	Mideast - (Cleveland)	1,841,479	587,967	31.9	0.92	18.51
FO 51	California - (Los Angeles)	1,670,735	394,998	23.6	-0.28	17.31
FO 124	Pacific Northwest - (Seattle)	480,291	128,379	26.7	0.13	17.72
FO 126	Southwest - (Dallas)	825,872	335,868	40.7	0.83	18.42
FO 131	Arizona - (Phoenix)	290,803	104,785	36.0	2/	18.28

^{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 OCTOBER 2025\$16.17/cwt.

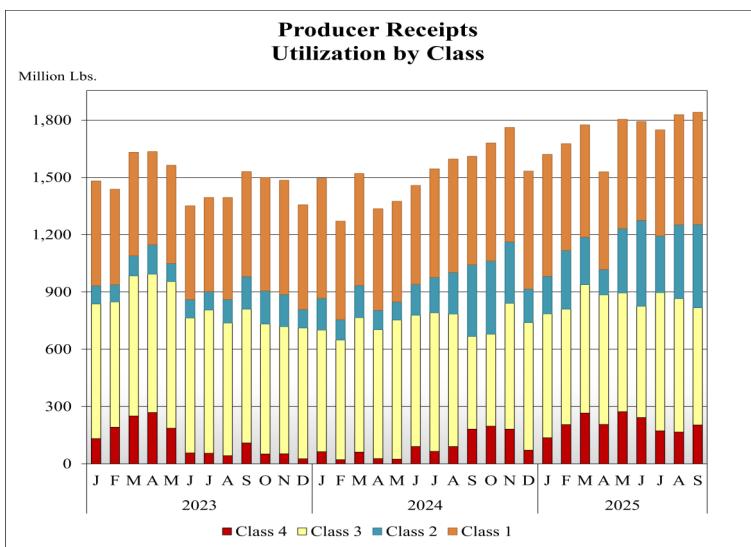
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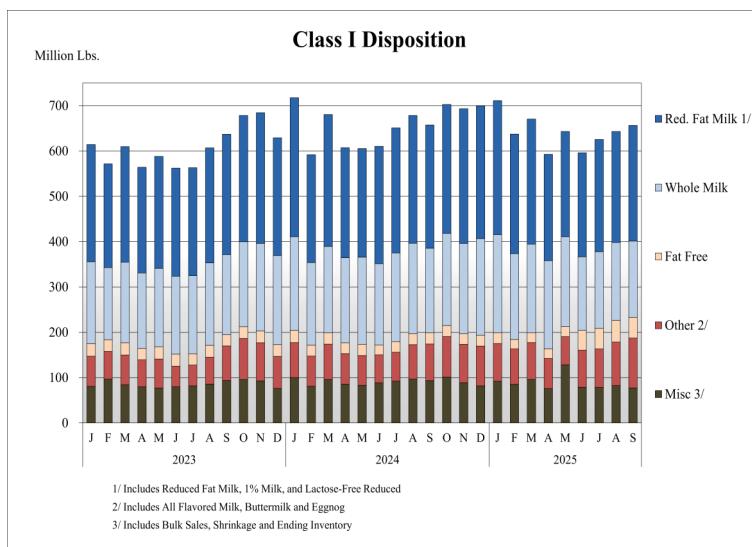
Mideast Market Administrator's Bulletin

Supplement
Federal Order No. 33 October 2025

PRODUCER MILK CLASSIFICATION

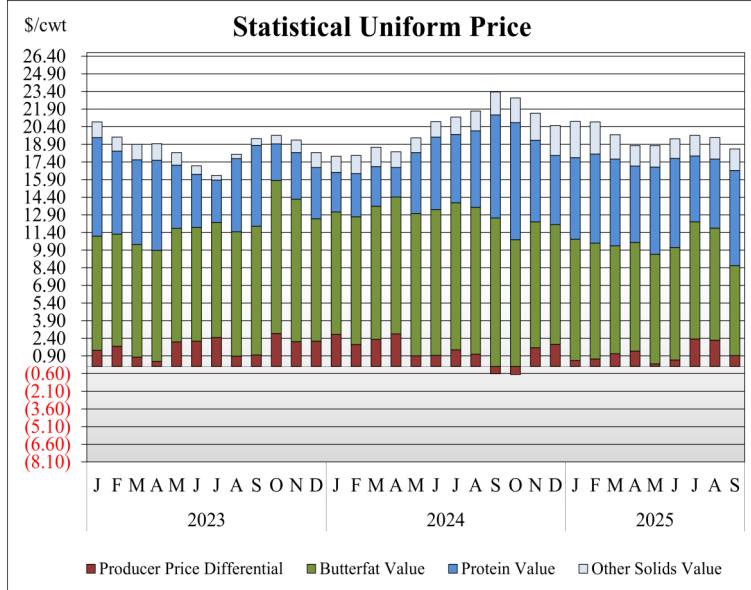


Producer Receipts: Producer receipts for the Mideast Order totaled 1,841 billion pounds in September 2025. The pounds allocated to Class I represented 31.9 percent of the total pounds. Producer receipts decreased 12 million pounds compared to August 2025, and were up 231 million pounds from the prior year.

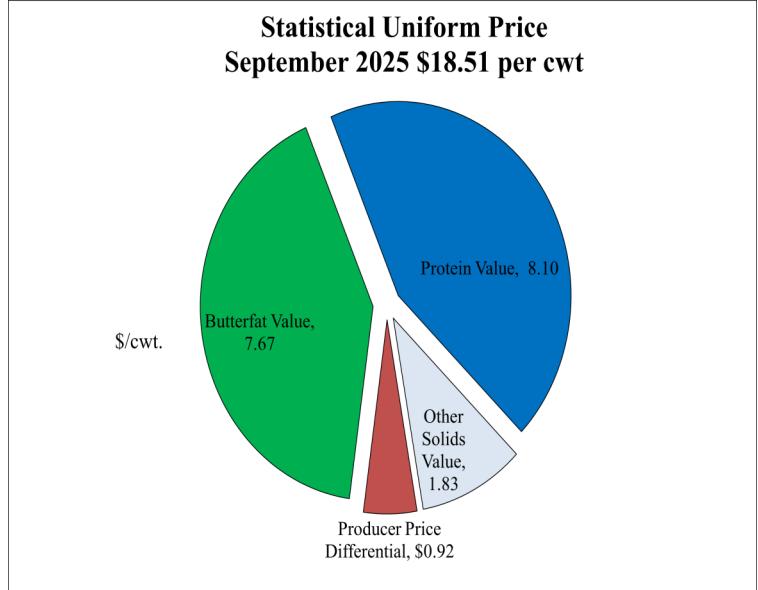


Class I Pounds: Class I Disposition for the Mideast Order totaled 657 million pounds in September 2025, down 1 million pounds from September 2024. Finished products include 168 million pounds used for whole milk, 255 million pounds of reduced fat and low fat milk, and 46 million pounds of fat free (skim) milk.

STATISTICAL UNIFORM PRICE

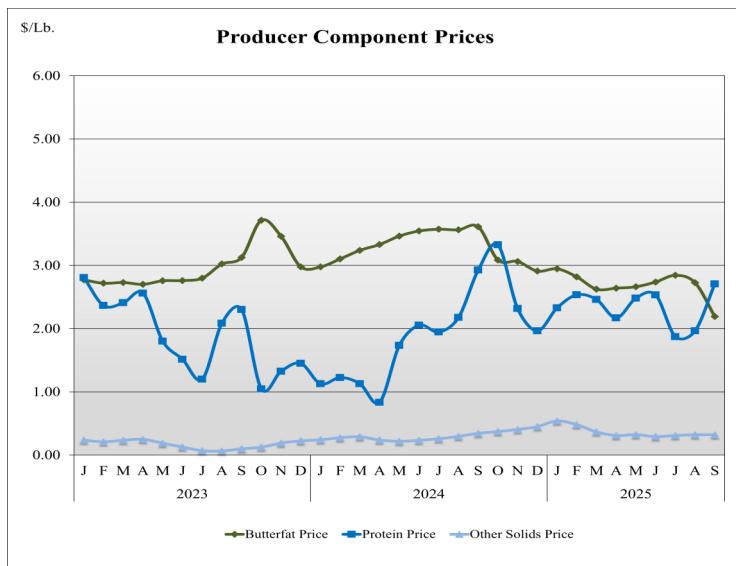


Statistical Uniform Price: The Mideast Federal Order Statistical Uniform Price (SUP) at Cuyahoga County, OH is \$18.51 per cwt for September 2025. The September 2025 SUP is \$4.21 per cwt lower than the September 2024 SUP. The September 2025 SUP is \$0.97 per cwt lower than the August 2025 SUP.



September 2025 Statistical Uniform Price: Using the Class III Price formula at 3.5% BF, the component values for the September 2025 SUP are: \$8.10 per cwt for protein, \$7.67 per cwt for butterfat and \$1.83 per cwt for other solids. Also included in the SUP is the \$0.92 per cwt producer price differential. (May not add to total due to rounding)

CLASS AND COMPONENT PRICES



WEIGHTED AVERAGE NATIONAL PRODUCT PRICES

