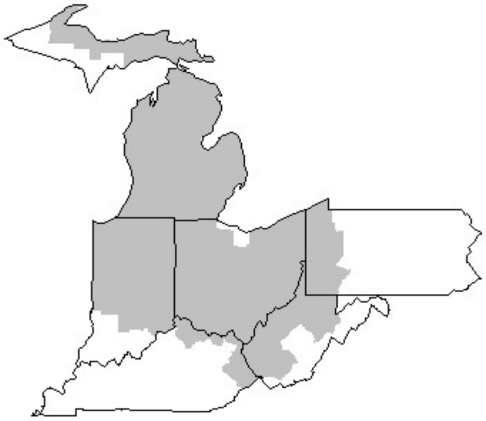
Mideast Market Administrator's Bulletin



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

SEPTEMBER 2025

Dairy Forecast for 2025

The 2025 dairy herd projection has been increased by 15,000 head to 9.450 million, reflecting data from the latest USDA, NASS Milk Production report, relatively low cull rates, favorable producer margins, and stronger expected domestic and export demand. The forecast for milk yield per cow has also been raised to 24,255 pounds, 55 pounds above the previous estimate. Consequently, the total milk production forecast for 2025 has been revised upward to 229.2 billion pounds, 0.9 billion pounds higher than last month's projection.

The projection for 2025 dairy imports on a milk-fat basis is 8.3 billion pounds, a decrease of 0.2 billion pounds from the previous forecast. On a skim-solids basis, imports are projected at 7.0 billion pounds, an increase of 0.1 billion pounds from the prior estimate, due to an expected increase in milk protein concentrate imports.

Dairy export projections for 2025 have been revised upward, reflecting stronger-than-anticipated global demand and updated trade data from the U.S. Department of Commerce, Bureau of the Census. On a milk-fat basis, exports are now forecast at 14.6 billion pounds, an increase of 0.8 billion pounds compared to the previous estimate, driven by higher-than-expected shipments of cheese and butter. Similarly, projections on a skim-solids basis have been raised to 47.7 billion pounds, up 2.4 billion pounds from last month's forecast as increase shipments of dry skim milk and dry whey products are expected. Cheese exports are expected to reach a record high in 2025, supported by expanded domestic processing capacity and sustained international demand.

Domestic use forecasts for 2025 have been adjusted lower than last month's forecast. On a milk-fat basis, domestic use is now projected at 222.9 billion pounds, a decrease of 0.1 billion pounds from the previous estimate. On a skim-solids basis, the forecast stands at 185.8 billion pounds, down 1.0 billion pounds from last month. These changes reflect the distribution of milk—expressed in milk-equivalent terms—between domestic use and international markets, rather than shifts in consumer purchasing behavior.

Based on recent NDPSR price movements, the updated wholesale price forecasts for key dairy products are as follows, with changes from last month in parentheses: Cheddar cheese at $1.840 (unchanged), dry whey at $0.575 (unchanged), NDM at $1.275 (up 1.50 cents), and butter at $2.520 (down 4.0 cents) per pound.

The Class III milk price forecast remains unchanged at $18.50 per cwt. The Class IV milk price forecast has been revised downward to $18.95 per cwt, a decrease of $0.10 from the prior projection. The all-milk price forecast for 2025 remains unchanged at $22.00 per cwt (rounded to the nearest nickel) from the last month's estimate.

Margins Tighten as Milk Output Increases

The all-milk price in June 2025 averaged $21.30 per hundredweight (cwt), a $1.50 year-over-year decrease. Meanwhile, feed costs, as reported for the Dairy Margin Coverage Program (DMC), were 94 cents per cwt lower than the same period in 2024. In June 2025, the DMC milk margin above feed costs was estimated at $11.10 per cwt, $0.56 lower than June 2024, as the decreases in feed costs were partially offset by a lower all-milk price.

The monthly average number of dairy cows and milk per cow continued to increase in June. According to the most recent Milk Production report published by USDA, National Agricultural Statistics Service (NASS), the average number of dairy cows in June 2025 was 9.469 million head, about 146,000 more head than last year and 4,000 head more than May. The June average dairy cow inventory was the largest since July 2021. Moreover, low culling levels indicate that producers continue to extend the productive life of existing cows given tight supplies of replacement heifers, elevated replacement cow prices, and high feeder cattle prices.

The milk-per-cow estimate for June 2025 was 2,031 pounds, about 1.7 percent higher than in June 2024. Notably, milk per cow in California was higher year over year for the first time since September 2024 when the first cases of herds impacted by highly pathogenic avian influenza (HPAI) were reported in the state. Driven by higher cow numbers and higher productivity, June 2025 milk production was estimated at 19.233 billion pounds, about 3.25 percent higher year over year, the largest increase since May 2021.

Livestock, Dairy, and Poultry Outlook: August 2025, LDP-M-373, August 18, 2025 USDA, Economic Research Service

August 2025 Pool Summary

Classification of Producer Milk

	Pounds	Percent
Class I	576,866,332	31.5
Class II	387,230,456	21.2
Class III	698,565,907	38.2
Class IV	166,403,463	9.1
Total	1,829,066,158	100.0

Producer Prices

Producer Price Differential	$2.24	/ cwt
Butterfat Price	2.7255	/ lb
Protein Price	1.9646	/ lb
Other Solids Price	0.3204	/ lb
Somatic Cell Adjustment Rate	0.00088	/ cwt
Statistical Uniform Price	19.48	/ cwt

ANNOUNCEMENT OF PRODUCER PRICES
Federal Order No. 33
AUGUST 2025
MIDEAST MARKETING AREA

COMPUTATION OF PRODUCER PRICE DIFFERENTIAL

	POUNDS	BUTTERFAT	SKIM / PROTEIN	NONFAT SOLIDS	OTHER SOLIDS	PRICE		VALUE
Class I Skim Value			563,538,509			$13.06	/ cwt	$73,598,129.28
Class I Butterfat		13,327,823				2.8945	/ lb	38,577,383.67
Class I Location Differential	576,866,332							(1,295,081.44)
Class II SNF Value				33,606,257		1.1067	/ lb	37,192,044.64
Class II Butterfat		27,793,357				2.7325	/ lb	75,945,348.05
Class III Protein Value			22,437,224			1.9646	/ lb	44,080,170.25
Class III Other Solids Value					40,382,569	0.3204	/ lb	12,938,575.10
Class III Butterfat		26,484,541				2.7255	/ lb	72,183,616.47
Class IV SNF Value				14,854,456		1.0323	/ lb	15,334,254.91
Class IV Butterfat		7,612,730				2.7255	/ lb	20,748,495.59
Somatic Cell Value II/III/IV								1,476,582.56
TOTAL PRODUCER MILK VALUE	1,829,066,158	75,218,451	58,553,197	163,897,474	105,344,277			$390,779,519.08
TOTAL ADJUSTMENTS								$561,222.50
TOTAL HANDLER OBLIGATIONS								$391,340,741.58
Total Protein Value			58,553,197			1.9646	/ lb	$115,033,610.83
Total Other Solids Value					105,344,277	0.3204	/ lb	33,752,306.35
Butterfat Value		75,218,451				2.7255	/ lb	205,007,888.20
Total Somatic Cell Values								2,079,468.97
TOTALS								$35,467,467.23
Net Producer Location Adjustments								$5,578,662.80
1/2 Unobligated Balance Producer Settlement Fund								711,000.00
Total - Divided by Total Pounds	1,829,105,049					$2.282927		$41,757,130.03
Rate of Cash Reserve						(0.042927)		(785,176.81)
PRODUCER PRICE DIFFERENTIAL *at Cuyahoga County, OH* [1]						**$2.24**	/ cwt	$40,971,953.22

COMPONENT PRICES

	August 2025	August 2024
Butterfat Price	$2.7255 / lb	$3.5632 / lb
Protein Price	1.9646 / lb	2.1756 / lb
Other Solids Price	0.3204 / lb	0.2959 / lb
Somatic Cell Adjustment Rate	0.00088 / cwt	0.00102 / cwt
Nonfat Solids Price [2]	1.0323 / lb	1.0484 / lb

COMPUTATION OF UNIFORM PRICE

	August 2025	August 2024
Class III Price - 3.5% BF	$17.24	$20.66
Producer Price Differential*	2.24	1.06
Statistical Uniform Price	$19.48	$21.72

CLASS PRICES

	August 2025	August 2024
Class I*	$22.73	$23.32
Class II	19.18	22.05
Class III	17.24	20.66
Class IV	18.50	21.58

[1] Subject to Location Adjustment.
[2] Producers are not paid on this component.

CLASSIFICATION OF PRODUCER MILK

	August 2025 *Product lbs.*	August 2024 *Product lbs.*
Class I	576,866,332	593,368,727
Class II	387,230,456	217,933,671
Class III	698,565,907	693,881,392
Class IV	166,403,463	90,707,986
Total	1,829,066,158	1,595,891,776

ORDER 33 MARKET SUMMARY

The Producer Price Differential for the Mideast Marketing Area for August 2025 was $2.24 and the Statistical Uniform Price was $19.48 for the month. The Statistical Uniform Price is $0.19 lower than last month and is $2.24 lower than August 2024. The Producer Butterfat Price of $2.7255 per pound decreased $0.1180 from July and is down $0.8377 from a year ago. The Protein Price of $1.9646 is up $0.0916 from last month and is down $0.2110 from August 2024. The Other Solids Price in August was $0.3204 per pound, an increase from last month's price of $0.3092 and $0.0245 higher than last August. The Somatic Cell Adjustment rate for August was $0.00088 per cwt. August producer receipts of 1.83 billion pounds were 4.6 percent higher than July and 14.6 percent higher than August 2024 production of 1.60 billion pounds. Producer milk allocated to Class I accounted for 31.5 percent of the total producer milk in August 2025, lower than 31.8 percent in July, and lower than 37.2 percent in August 2024. A total of 3,293 producers were pooled on the Mideast Order compared to 3,402 producers pooled in August 2024. The market average content of producer milk was as follows: Butterfat 4.11%; Protein 3.20%; Other Solids 5.76% and Nonfat Solids 8.96%.

July 2025 Highlights

Total cheese output (excluding cottage cheese) was 1.21 billion pounds, 2.1 percent above July 2024 and 0.9 percent above June 2025.

Italian type cheese production totaled 518 million pounds, 4.1 percent above July 2024 and 1.5 percent above June 2025.

American type cheese production totaled 476 million pounds, 2.3 percent above July 2024 and 0.4 percent above June 2025.

Butter production was 180 million pounds, 9.8 percent above July 2024 but 4.4 percent below June 2025.

Dry milk products (comparisons in percentage with July 2024)
Nonfat dry milk, human - 130 million pounds, up 7.1 percent.
Skim milk powder - 44.4 million pounds, down 14.3 percent.

Whey products (comparisons in percentage with July 2024)
Dry whey, total - 68.3 million pounds, up 0.6 percent.
Lactose, human and animal - 96.0 million pounds, up 1.0 percent.
Whey protein concentrate, total - 41.0 million pounds, up 5.2 percent.

Frozen products (comparisons in percentage with July 2024)
Ice cream, regular (hard) - 69.3 million gallons, up 4.2 percent.
Ice cream, lowfat (total) - 39.1 million gallons, up 1.8 percent.
Sherbet (hard) - 1.75 million gallons, down 5.5 percent.
Frozen yogurt (total) - 3.55 million gallons, down 0.8 percent.

Released September 5, 2025, by the National Agricultural Statistics Service (NASS), Agricultural Statistics Board, United States Department of Agriculture (USDA).

July Milk Production Up 3.5 Percent

Milk production in the 24 major States during July totaled 18.8 billion pounds, up 3.5 percent from July 2024. June revised production, at 18.5 billion pounds, was up 3.4 percent from June 2024. The June revision represented an increase of 5 million pounds or less than 0.1 percent from last month's preliminary production estimate. Production per cow in the 24 major States averaged 2,081 pounds for July, 36 pounds above July 2024. The number of milk cows on farms in the 24 major States was 9.04 million head, 154,000 head more than July 2024, and 8,000 head more than June 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 July totaled 2.75 billion pounds, up 46 million pounds or 1.7 percent from July 2024. Production per cow in the Mideast states averaged 2,060 pounds for July, 15 pounds more than July 2024. The number of cows on farms in the Mideast states was 1.35 million head, 12,000 head more than July 2024.

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

Bulletin WebPage Edition
www.fmmaclev.com

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

	July 2025							July 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	691	860,938	4.11	3.18	5.80	193	742,500	4.05	3.16	5.80	180
Ohio	1,130	419,623	4.08	3.17	5.76	231	379,868	3.92	3.11	5.68	215
Indiana	564	294,180	3.99	3.10	5.69	227	244,018	4.02	3.16	5.80	223
Pennsylvania	632	80,627	3.93	3.04	5.66	272	77,256	3.91	3.06	5.65	254
New York	110	55,596	4.27	3.21	5.86	209	42,229	4.22	3.19	5.88	203
Other	154	38,220	4.07	3.17	5.77	218	58,693	4.14	3.17	5.76	184
Total/Average *	3,281	1,749,183	4.08	3.16	5.77	213	1,544,565	4.01	3.14	5.76	200

* 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
1325 Industrial Parkway North
P.O. Box 5102
Brunswick, Ohio 44212

PRSRT STD
U.S. POSTAGE
PAID
Cleveland, Ohio
Permit No. 2511

POSTMASTER: Time Sensitive Material - Deliver Promptly

FEDERAL ORDER DATA
August 2025

Marketing Area [1/]		Producer Milk Total (000)	Producer Milk Class I (000)	Class I Percent %	Producer Price Differential (per cwt.)	Statistical Uniform Price (per cwt.)
FO 1	Northeast - (*Boston*)	2,334,861	620,587	26.6	$3.08	$20.32
FO 5	Appalachian - (*Charlotte*)	417,159	304,809	73.1	[2/]	23.02
FO 6	Florida - (*Tampa*)	212,560	167,034	78.6	[2/]	24.11
FO 7	Southeast - (*Atlanta*)	265,225	203,003	76.5	[2/]	23.55
FO 30	Upper Midwest - (*Chicago*)	2,531,010	156,985	6.2	0.58	17.82
FO 32	Central - (*Kansas City*)	1,237,343	336,193	27.2	1.87	19.11
FO 33	**Mideast - (*Cleveland*)**	**1,829,066**	**576,866**	**31.5**	**2.24**	**19.48**
FO 51	California - (*Los Angeles*)	1,986,964	373,558	18.8	1.37	18.61
FO 124	Pacific Northwest - (*Seattle*)	555,188	115,445	20.8	1.47	18.71
FO 126	Southwest - (*Dallas*)	1,331,045	327,015	24.6	2.01	19.25
FO 131	Arizona - (*Phoenix*)	354,822	103,804	29.3	[2/]	19.14

[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.

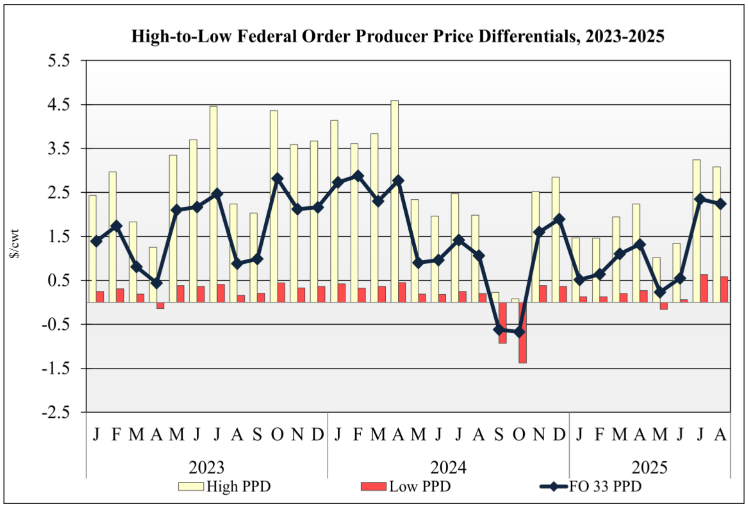
MINIMUM PARTIAL PAYMENT PRICE FOR SEPTEMBER 2025....................$17.24/cwt.

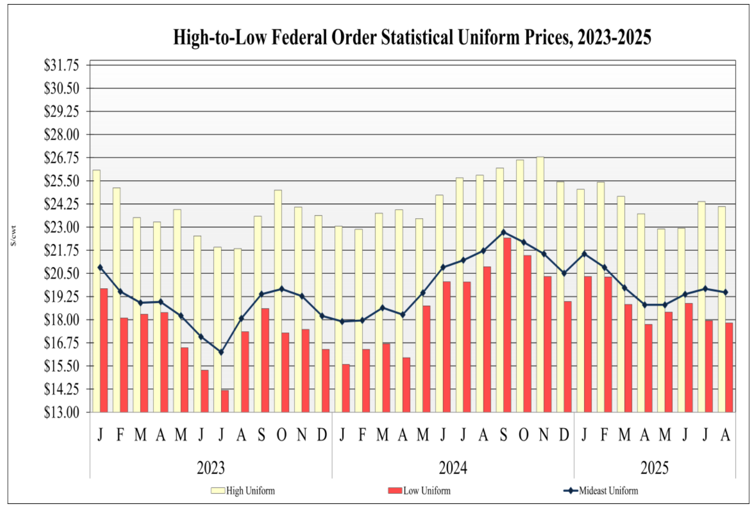
Printed on recycled paper

Mideast Market Administrator's
Bulletin
Federal Order No. 33

Supplement
September 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 August 2025 Federal Order 1 had a PPD of $3.08 per hundredweight (cwt), $0.16 lower than their July 2025 PPD.

In August 2025, Federal Order 33 had the second highest PPD, behind Order 1, at $2.24 per cwt, $0.11 per cwt lower than their July 2025 PPD.

For August 2025, Federal Order 30 had the lowest PPD at $0.58 per cwt, $0.05 lower than their July 2025 PPD.

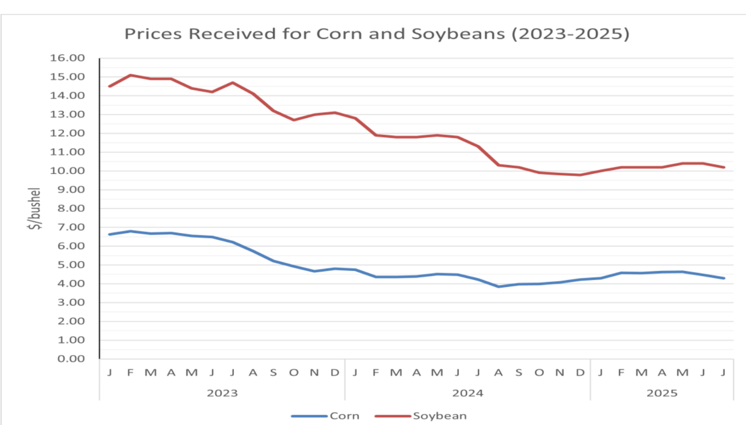
Producers in Orders 1, 30, 32, 33, 51, 124, and 126 are paid based on component pricing; and producers in 5, 6, 7 and 131 are paid based on skim-fat pricing. The table above details the range of statistical uniform prices (SUP) paid to producers.

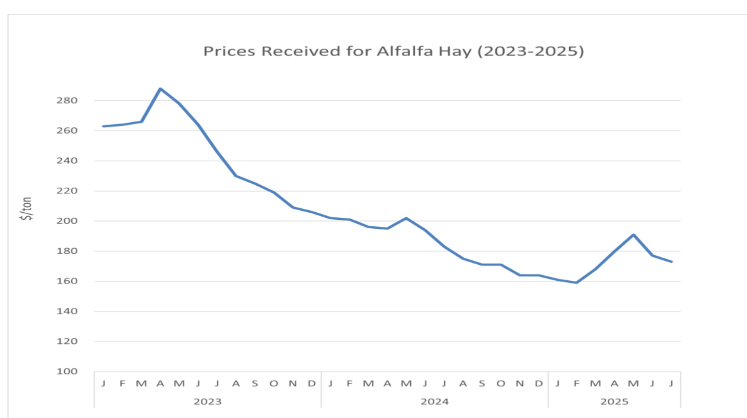
Of those orders, Federal Order 6 (Florida) traditionally has the highest statistical uniform price. For August 2025, Federal Order 6 had a SUP of $24.11 per cwt, $0.27 lower than their July 2025 SUP.

For August 2025, Federal Order 33 had a SUP of $19.48 per cwt, $0.19 per cwt lower than their July 2025 SUP.

For August 2025, Federal Order 30 had the lowest SUP at $17.82 per cwt, $0.13 per cwt higher than their July 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