

EU Dairy Markets Summary

in '000 t	2014	2015	2016	2017 ¹⁾	2018 ²⁾
	EU-28	EU-28	EU-28	EU-28	EU-28
Dairy Cows (December census, '000head)	23.559	23.595	23.507	23.400	23.350
Milk Deliveries to dairies	148.770	151.985	152.687	155.492	157.672
Milk for liquid consumption	31.581	31.389	30.820	30.500	30.000
Fermented Products and Desserts	9.751	9.842	9.963	10.000	10.030
Butter					
Production ³⁾	2.120	2.190	2.230	2.220	2.210
Consumption	1.989	2.026	2.066	2.062	2.060
Cheese					
Production ⁴⁾	9.912	10.150	10.328	10.470	10.600
Consumption ⁵⁾	9.217	9.392	9.658	9.680	9.780
Skim Milk Powder					
Production	1.550	1.670	1.680	1.650	1.680
Consumption	830	860	890	920	945
Whole Milk Powder production	820	805	815	830	830
Condensed Milk production	1.165	1.150	1.050	1.100	1.100
Skim Milk used for Casein	5.400	5.450	5.450	5.550	5.550
Population (million head)	507	508	510	511	512

1) Preliminary, 2) Estimated/Forecast, 3) Incl. an estimation for butteroil made from cream in butterequivalents.

4) Incl. Cheese made from other animals milk and processed cheese impact, 5) Including processed cheese.

Source: ZMB Berlin, Germany

Updated May 2018

EU: Cow Milk Deliveries to Dairies

'000 tonnes	2013	2014	2015	2016	2017x	Forecast 2018
	EU 28	142.212	148.770	151.985	152.687	155.492
EU 27	141.708	148.247	151.471	152.198	155.016	157.197
EU 25	140.315	146.755	150.050	150.715	153.395	155.447
EU 15	121.956	127.273	130.560	130.896	133.076	134.870
EU 10	8.427	8.853	8.616	8.665	8.683	8.727
EU 2	1.393	1.491	1.421	1.483	1.621	1.750
Belgium	3.399	3.569	3.669	3.789	3.926	4.100
Bulgaria	511	495	505	530	593	650
Czech Rep.	2.740	2.830	2.508	2.532	2.552	2.600
Denmark	5.026	5.112	5.276	5.375	5.491	5.600
Germany	30.301	31.375	31.879	31.973	31.937	32.300
Estonia	706	730	720	715	727	740
Greece	607	615	612	619	614	630
Spain	6.305	6.679	6.793	6.886	7.022	7.200
France	23.974	25.293	25.375	24.452	24.606	25.000
Ireland	5.585	5.802	6.591	6.854	7.481	7.800
Italy	10.701	11.037	11.161	11.516	11.949	12.200
Cyprus	157	165	160	198	216	230
Latvia	736	804	808	814	814	800
Lithuania	1.339	1.436	1.438	1.413	1.403	1.400
Luxembourg	287	306	333	365	374	400
Hungary	1.364	1.470	1.523	1.552	1.525	1.500
Croatia	504	523	514	490	477	475
Malta	41	43	42	43	41	42
Netherlands	12.213	12.473	13.326	14.324	14.297	14.200
Austria	2.933	3.062	3.103	3.092	3.200	3.400
Poland	9.932	10.630	10.875	11.154	11.636	11.850
Portugal	1.777	1.856	1.928	1.843	1.851	1.860
Romania	882	997	916	953	1.028	1.100
Slovenia	517	532	553	575	579	585
Slovakia	827	844	865	823	826	830
Finland	2.287	2.357	2.394	2.399	2.366	2.380
Sweden	2.870	2.932	2.921	2.862	2.817	2.800
UK	13.692	14.804	15.199	14.547	15.145	15.000

Since 2015 new series for Germany, Czech Republic and Austria.

Source: ZMB, national statistics, Eurostat, European Commission.

Source: ZMB, Germany

EU Milk Deliveries 000 t	January - April			Apr.
	2017	2018*	18:17 *	18:17 *
Belgium	1.293	1.366	+ 5,7%	+ 4,4%
Bulgaria	180	215	+ 19,4%	+ 15,9%
Czech Rep.	839	872	+ 4,0%	.
Denmark	1.793	1.836	+ 2,4%	+ 2,0%
Germany	10.546	10.902	+ 3,4%	+ 3,2%
Baltic States	876	879	+ 0,3%	+ 0,6%
Greece	206	210	+ 2,4%	.
Spain	2.347	2.418	+ 3,0%	+1,4%
France	8.487	8.628	+ 1,7%	-0,5%
Ireland	1.966	1.949	- 0,9%	-5,9%
Italy	4.126	4.260	+ 3,2%	.
Croatia	162	160	- 1,2%	-.
Luxembourg	125	135	+ 7,9%	+ 7,2%
Hungary	531	527	- 0,7%	+4,1%
Netherlands	4.810	4.745	- 1,3%	- 1,7%
Austria	1.077	1.148	+6,6%	+ 4,5%
Poland	3.809	3.923	+ 3,0%	+2,8%
Portugal	632	646	+ 2,2%	+0,9%
Romania	314	342	+ 8,9%	+10,7%
Slovenia	194	197	+ 1,7%	+0,7%
Slovakia	277	279	+ 0,7%	+ 1,6%
Finland	793	794	+ 0,0%	+0,9%
Sweden	963	947	- 1,7%	-.
U. Kingdom	5.063	5.064	+ 0,0%	-0,8%
EU -28	51.497	52.537	+2,0%	+0,9%

*) Provisional/ Estimate. ** Adjusted for leap day.

Sources: ZMB, national statistics.

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EU-Production of Dairy Products

000 t	January -March			Mar.
	2017	2018*	18:17 *	18:17 *
Liquid milk	7.819	7.721	- 1,2%	- 0,9%
Cream	674	661	- 1,8%	- 0,7%
Fermented Products	2.250	2.242	- 0,4%	- 5,8%
Butter	543	551	+ 1,5%	+ 1,5%
Cheese	2.281	2.324	+ 1,9%	+ 0,8%
WMP etc.	199	192	- 3,4%	- 7,6%
SMP	384	413	+ 7,6%	+ 3,7%
Condensed milk	231	222	- 3,9%	- 8,8%

*) Provisional.

Sources: ZMB, Eurostat, national statistics.

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EU Balance Sheet of Milk for Liquid Consumption

'000 t	2014 EU 28	2015 EU 28	2016* EU 28	2017* EU 28	2018** EU 28
Production	31.581	31.389	30.820	30.500	30.000
Imports	8	10	10	10	10
Exports	448	603	737	740	750
Sales	31.142	30.796	30.093	29.770	29.260
Per capita (kg)	61,4	60,6	59,0	58,1	57,0

*)Provisional **) Estimation/Forecast.

Source: ZMB

Updated May 2018

EU Balance Sheet of Whole Milk Powder

'000 t	2014 EU 28	2015 EU 28	2016 EU 28	2017* EU 28	2018** EU 28
Production	820	805	815	830	830
Imports	1	3	6	2	3
Exports	389	400	380	393	390
Change in stocks	30	-10	10	0	0
Sales	403	419	430	439	443

*)Provisional **) Forecast.

Source: ZMB

Updated May 2018

EU Butter Balance Sheet

'000 t	2014 EU 28	2015 EU 28	2016 EU 28	2017* EU 28	2018** EU 28
Initial stocks	100	130	130	95	90
Total production	2.120	2.190	2.230	2.220	2.210
- in dairies ¹⁾	2.100	2.170	2.210	2.200	2.190
- on farms	20	20	20	20	20
Imports	53	27	23	16	15
Exports	154	191	222	179	170
Final stocks	130	130	95	90	85
thereof public stocks	0	0	0	0	0
thereof PSA	21	55	25	0	0
Disappearance	1.989	2.026	2.066	2.062	2.060
Per capita (kg)	3,9	4,0	4,1	4,0	4,0

*)Provisional **) Forecast. 1)incl. An estimation for Butteroil made from cream and mixtures.

Source: ZMB

Updated May 2018

EU Cheese Balance Sheet

'000 t	2014 EU 28	2015 EU 28	2016 EU 28	2017* EU 28	2018** EU 28
Production	9.702	9.950	10.148	10.290	10.430
- from cows' milk in dairies	8.882	9.130	9.318	9.460	9.600
- on farms	100	100	100	100	100
- from other milk	720	720	730	730	730
Imports	76	61	71	59	60
Processing addition ¹⁾	210	200	180	180	170
Available	9.988	10.211	10.398	10.529	10.660
Exports	721	719	800	830	860
Stock Change	50	100	-60	20	20
Consumption	9.217	9.392	9.658	9.680	9.780
- per capita (kg)	18,2	18,5	18,9	18,9	19,1

1) From processed cheese. *)Provisional **) Forecast.

Source: ZMB

Updated May 2018

Source: ZMB, Germany

EU Whey Powder Balance Sheet

'000 t	2015*	2016*	2017*	2018**
	EU 28	EU 28	EU 28	EU 28
Production	2.100	2.050	2.100	2.080
Imports	8	10	15	10
Exports	538	553	565	570
Stock change	-50	-70	0	0
Consumption	1620	1577	1550	1520

Partly desugared and demineralised whey powder included.

*) Estimated. **) Forecast.

Source: ZMB

Updated May 2018

EU Lactose Balance Sheet

000 t	2015*	2016*	2017*	2018**
	EU 28	EU 28	EU 28	EU 28
Production¹⁾	530	580	570	570
Import	5	8	8	8
Export	166	184	203	200
Stock change ²⁾	0	10	25	0
Consumption³⁾	368	393	351	378

*) Estimated. **) Forecast. 1) Partly estimated.

2) Total stocks (manufacturers and users), estimated. 3) Partly used as feed.

Source: ZMB

Updated May 2018

EU SMP Balance Sheet

'000 t	2014	2015	2016	2017*	2018**
	EU 28	EU 28	EU 28	EU 28	EU 28
Opening stocks	77	153	282	502	455
Production	1.550	1.670	1.680	1.650	1.680
Imports	2	3	4	3	5
Available	1.629	1.827	1.966	2.154	2.140
Consumption	830	860	890	920	945
- other than feed	700	720	750	775	790
- in feed	130	140	140	145	155
Exports	646	684	574	779	850
Ending stocks	153	282	502	455	345
- in intervention	0	29	350	375	250
- in PSA	16	31	66	.	.

*)Provisional **) Forecast.

Source: ZMB

Updated May 2018