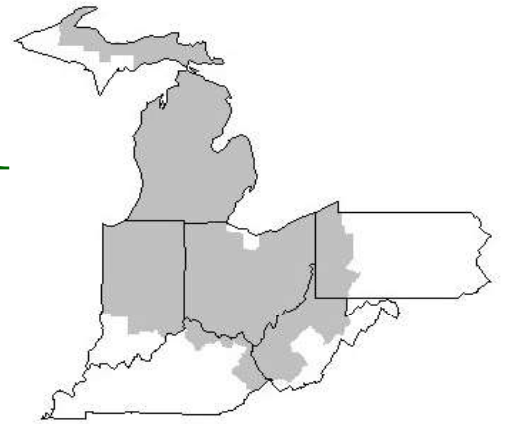


Mideast Market Administrator's Bulletin



Federal Order No. 33

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JANUARY 2026

Dairy Forecasts for 2026

For 2026 the forecast for the number of dairy cows is unchanged from the last forecast at 9.555 million head, while the forecast for milk per cow increased by 15 pounds to 24,520 pounds of milk per cow. Therefore, the 2026 milk production forecast is now 234.3 billion pounds, 0.2 billion pounds higher than the last projection. USDA, NASS will issue its Cattle report on January 30 which includes milk cow inventory data along with dairy replacement heifer numbers. The report will give insight into the current state of the herd and will inform the outlook for much of 2026.

Dairy import forecasts for 2026 are adjusted as follows: imports on a milk-fat basis are now projected at 8.3 billion pounds (+0.1 billion), while imports on a skim-solids basis have been lowered to 7.0 billion pounds (-0.1 billion). Higher import volumes are expected for specialty butter and international types of cheeses, whereas imports of casein and milk protein concentrate are expected to decline.

Following strong 2025 exports of cheese and butter, driven mainly by competitive prices, the 2026 export forecast on a milk-fat basis has been raised by 2.0 billion pounds to 17.0 billion pounds, representing an expected new record high. Conversely, the 2026 dairy export forecast on a skim-solids basis has been revised downward to 48.1 billion pounds (-0.1 billion), as lower expected exports of dry whey products and stagnant NDM/SMP exports due to relatively weaker international demand are expected to more than offset higher expected cheese exports.

Domestic use on a milk-fat basis for 2026 is forecast at 224.5 billion pounds, 1.7 billion pounds lower than the previous projection due to weaker expected demand for Cheddar cheese and local butter in the retail and food service sectors. On a skim-solids basis, domestic disappearance has increased by 0.3 billion pounds to 192.7 billion pounds from last month's projection, as domestic demand for dairy proteins is expected to remain strong.

Based on the 2025 forecast and recent movements in dairy product prices, the 2026 average price forecasts for major dairy products have been adjusted accordingly from the previous forecast. Wholesale price forecasts for Cheddar cheese, butter, NDM, and dry whey have been adjusted to \$1.585 (-9.0 cents), \$1.610 (-6.5 cents), \$1.205 (+3.5 cents), and \$0.670 (+3.5 cents) per pound, respectively. Revisions from last month's forecast for 2026 milk class prices are as follows: Class III milk price is now \$16.35 (-\$0.70) per cwt, and the Class IV forecast at \$14.45 (+\$0.05) per cwt. The all-milk price for 2026 is now forecast at \$18.25, down 50 cents from last month's forecast.

Milk-Feed Ratio Shrinks, Culling Levels Rise

The all-milk price in November 2025 averaged \$19.70 per hundredweight (cwt), a \$4.50 year-over-year decrease. Meanwhile, November prices for corn and hay were slightly lower year over year while the soybean meal price was higher year over year. Consequently, the November milk-feed ratio was 2.38, about 0.5 points lower than November 2024. The milk-feed ratio has been mostly declining since reaching a peak of 3.01 in September 2024.

Milk components continue to test at higher levels. November milk-fat test reported by USDA, NASS averaged 4.46 percent, while the skim-solids test reported by USDA, Agricultural Marketing Service (AMS) averaged 9.21 percent, both higher year over year. Consequently, November total milk fat and skim solids production were about 6.10 and 4.80 percent higher year over year, respectively.

Dairy cow slaughter levels during the first half of 2025 were below last year's slaughter levels. The low culling levels likely indicate that producers chose to extend the productive life of existing cows partially due to tight supplies of replacement heifers, elevated replacement cow prices, and high feeder cattle prices increasing the value of cross-bred calves. Moreover, the low feed prices through most of 2025 likely helped farmers to keep dairy cows longer in the productive cycle. However, during second half of the year, the slaughter rates have been mostly above the 2024 levels, with weekly dairy cow slaughter in the last 4 weeks of the year averaging slightly above last year's levels.

*Livestock, Dairy, and Poultry Outlook: January 2026, LDP-M-379, January 16, 2026
USDA, Economic Research Service*

December 2025 Pool Summary

Classification of Producer Milk

	Pounds	Percent
Class I	597,151,825	35.2
Class II	380,774,424	22.4
Class III	462,281,743	27.3
Class IV	256,542,523	15.1
Total	1,696,750,515	100.0

Producer Prices

Producer Price Differential	\$1.15 / cwt
Butterfat Price	1.5761 / lb
Protein Price	2.4563 / lb
Other Solids Price	0.4352 / lb
Somatic Cell Adjustment Rate	0.00076 / cwt
Statistical Uniform Price	17.01 / cwt

ANNOUNCEMENT OF PRODUCER PRICES
Federal Order No. 33
DECEMBER 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			583,042,021			\$16.54 / cwt	\$96,435,150.27
Class I Butterfat		14,109,804				1.7294 / lb	24,401,495.04
Class I Location Differential	597,151,825						(1,330,956.73)
Class II SNF Value				34,498,070		0.9882 / lb	34,090,992.80
Class II Butterfat		24,699,744				1.5831 / lb	39,102,164.73
Class III Protein Value			16,069,760			2.4563 / lb	39,472,151.51
Class III Other Solids Value					26,664,914	0.4352 / lb	11,604,570.56
Class III Butterfat		20,405,391				1.5761 / lb	32,160,936.78
Class IV SNF Value				23,183,626		0.9057 / lb	20,997,410.07
Class IV Butterfat		17,196,685				1.5761 / lb	27,103,695.22
Somatic Cell Value II/III/IV							1,615,717.24
TOTAL PRODUCER MILK VALUE	1,696,750,515	76,411,624	58,916,001	156,797,658	97,881,657		\$325,653,327.49
TOTAL ADJUSTMENTS							(\$751,191.19)
TOTAL HANDLER OBLIGATIONS							\$324,902,136.30
Total Protein Value			58,916,001			2.4563 / lb	\$144,715,373.26
Total Other Solids Value					97,881,657	0.4352 / lb	42,598,097.13
Butterfat Value		76,411,624				1.5761 / lb	120,432,360.59
Total Somatic Cell Values							2,473,076.43
TOTALS							\$14,683,228.90
Net Producer Location Adjustments							\$4,798,024.01
1/2 Unobligated Balance Producer Settlement Fund							753,000.00
Total - Divided by Total Pounds	1,696,771,855					\$1.192515	\$20,234,252.91
Rate of Cash Reserve						(0.042515)	(721,376.62)
PRODUCER PRICE DIFFERENTIAL at Cuyahoga County, OH ¹						\$1.15 / cwt	\$19,512,876.29

COMPONENT PRICES

December

	<u>2025</u>	<u>2024</u>
Butterfat Price	\$1.5761 / lb	\$2.9104 / lb
Protein Price	2.4563 / lb	1.9637 / lb
Other Solids Price	0.4352 / lb	0.4493 / lb
Somatic Cell Adjustment Rate	0.00076 / cwt	0.00088 / cwt
Nonfat Solids Price ²	0.9057 / lb	1.2151 / lb

COMPUTATION OF UNIFORM PRICE

December

	<u>2025</u>	<u>2024</u>
Class III Price - 3.5% BF	\$15.86	\$18.62
Producer Price Differential*	<u>1.15</u>	<u>1.89</u>
Statistical Uniform Price	\$17.01	\$20.51

CLASS PRICES

December

	<u>2025</u>	<u>2024</u>
Class I*	\$22.01	\$23.43
Class II	14.41	21.28
Class III	15.86	18.62
Class IV	13.64	20.74

CLASSIFICATION OF PRODUCER MILK

December

	<u>2025</u>	<u>2024</u>
	<i>Product lbs.</i>	<i>Product lbs.</i>
Class I	597,151,825	617,844,062
Class II	380,774,424	176,222,595
Class III	462,281,743	667,858,363
<u>Class IV</u>	<u>256,542,523</u>	<u>71,495,297</u>
Total	1,696,750,515	1,533,420,317

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 December 2025 was \$1.15 and the Statistical Uniform Price was \$17.01 for the month. The Statistical Uniform Price is \$0.49 higher than last month and is \$3.50 lower than December 2024. The Producer Butterfat Price of \$1.5761 per pound decreased \$0.1300 from November and is down \$1.3343 from a year ago. The Protein Price of \$2.4563 is down \$0.5580 from last month and is up \$0.4926 from December 2024. The Other Solids Price in December was \$0.4352 per pound, a decrease from last month's price of \$0.4493 and \$0.0141 lower than last December. The Somatic Cell Adjustment rate for December was \$0.00076 per cwt.

December producer receipts of 1.70 billion pounds were 12.8 percent higher than November and 10.7 percent higher than December 2024 production of 1.53 billion pounds. Producer milk allocated to Class I accounted for 35.2 percent of the total producer milk in December 2025, lower than 39.5 percent in November, and lower than 40.3 percent in December 2024. A total of 3,267 producers were pooled on the Mideast Order compared to 3,395 producers pooled in December 2024. The market average content of producer milk was as follows: Butterfat 4.50%; Protein 3.47%; Other Solids 5.77% and Nonfat Solids 9.24%.

November 2025 Highlights

Total cheese output (excluding cottage cheese) was 1.22 billion pounds, 5.9 percent above November 2024 but 3.4 percent below October 2025.

Italian type cheese production totaled 526 million pounds, 6.8 percent above November 2024 but 2.7 percent below October 2025.

American type cheese production totaled 474 million pounds, 5.6 percent above November 2024 but 3.7 percent below October 2025.

Butter production was 180 million pounds, 2.2 percent above November 2024 but 3.4 percent below October 2025.

Dry milk products (comparisons in percentage with November 2024) Nonfat dry milk, human - 108 million pounds, down 9.8 percent. Skim milk powder - 40.5 million pounds, down 9.9 percent.

Whey products (comparisons in percentage with November 2024) Dry whey, total - 64.8 million pounds, up slightly. Lactose, human and animal - 87.2 million pounds, up 2.7 percent. Whey protein concentrate, total - 41.7 million pounds, up 4.9 percent.

Frozen products (comparisons in percentage with November 2024) Ice cream, regular (hard) - 49.8 million gallons, down 2.0 percent. Ice cream, lowfat (total) - 24.4 million gallons, down 5.2 percent. Sherbet (hard) - 1.45 million gallons, up 10.0 percent. Frozen yogurt (total) - 2.42 million gallons, down 9.5 percent.

Released January 6, 2026, by the National Agricultural Statistics Service (NASS), Agricultural Statistics Board, United States Department of Agriculture (USDA).

November Milk Production Up 4.7 Percent

Milk production in the 24 major States during November totaled 18.1 billion pounds, up 4.7 percent from November 2024. October revised production, at 18.7 billion pounds, was up 3.8 percent from October 2024. The October revision represented a decrease of 11 million pounds or 0.1 percent from last month's preliminary production estimate. Production per cow in the 24 major States averaged 1,979 pounds for November, 43 pounds above November 2024. The number of milk cows on farms in the 24 major States was 9.13 million head, 214,000 head more than November 2024, and 1,000 head more than October 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 November totaled 2.65 billion pounds, up 54 million pounds or 2.1 percent from November 2024. Production per cow in the Mideast states averaged 1,969 pounds for November, 11 pounds more than November 2024. The number of cows on farms in the Mideast states was 1.37 million head, 21,000 head more than November 2024.

Released January 6, 2026, 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)	November 2025 -----Weighted Averages-----				November 2024 -----Weighted Averages-----				
			Butterfat	Protein	Other Solids	SCC (000)	Pounds of Milk (000)	Butterfat	Protein	Other Solids	SCC (000)
Michigan	705	683,214	4.45	3.44	5.80	151	911,541	4.29	3.34	5.78	159
Ohio	1,130	409,610	4.44	3.47	5.76	174	399,939	4.25	3.33	5.71	179
Indiana	582	259,483	4.35	3.39	5.73	167	260,777	4.28	3.35	5.81	189
Pennsylvania	648	74,374	4.54	3.45	5.82	208	48,973	4.59	3.43	5.88	177
New York	107	64,400	4.49	3.35	5.65	154	74,835	4.27	3.28	5.67	216
Other	132	13,740	4.50	3.48	5.68	224	65,670	4.5	3.4	5.76	178
Total/Average *	3,304	1,504,821	4.44	3.44	5.77	163	1,761,735	4.29	3.34	5.77	171

* 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.



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**FEDERAL ORDER DATA
December 2025**

Marketing Area ^{1/}	Producer Milk		Class I Percent %	Producer Price Differential (per cwt.)	Statistical Uniform Price (per cwt.)
	Total (000)	Class I (000)			
FO 1 Northeast - (Boston)	2,292,793	691,005	30.1	1.81	\$17.67
FO 5 Appalachian - (Charlotte)	437,874	333,404	76.1	^{2/}	21.80
FO 6 Florida - (Tampa)	217,528	180,641	83.0	^{2/}	23.16
FO 7 Southeast - (Atlanta)	294,254	223,440	75.9	^{2/}	21.89
FO 30 Upper Midwest - (Chicago)	1,201,032	176,916	14.7	0.35	16.21
FO 32 Central - (Kansas City)	985,987	380,225	38.6	0.97	16.83
FO 33 Mideast - (Cleveland)	1,696,751	597,152	35.2	1.15	17.01
FO 51 California - (Los Angeles)	1,908,738	414,754	21.7	-0.53	15.33
FO 124 Pacific Northwest - (Seattle)	517,002	130,077	25.2	0.05	15.91
FO 126 Southwest - (Dallas)	862,521	328,895	38.1	1.07	16.93
FO 131 Arizona - (Phoenix)	362,622	111,043	30.6	^{2/}	16.22

^{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 JANUARY 2026.....\$13.64/cwt.



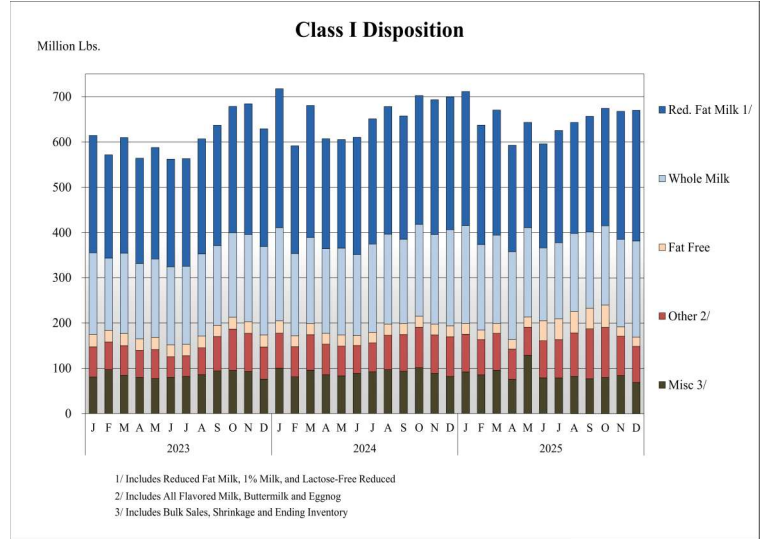
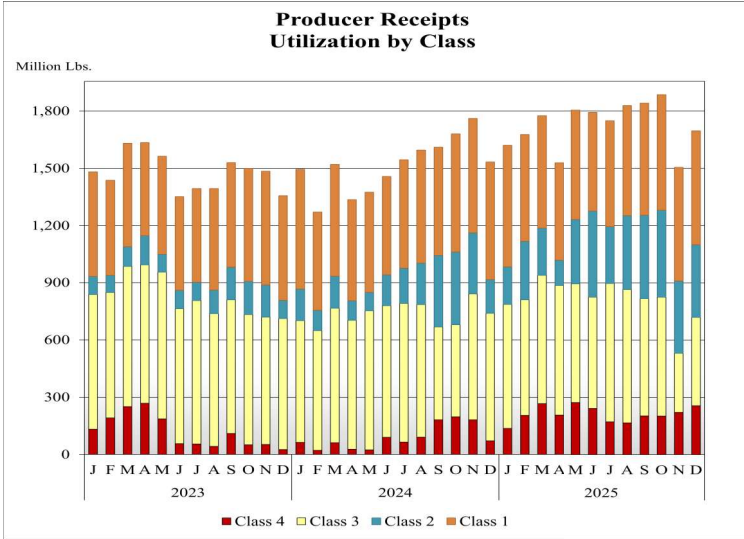
Mideast Market Administrator's Bulletin

Supplement

Federal Order No. 33

January 2026

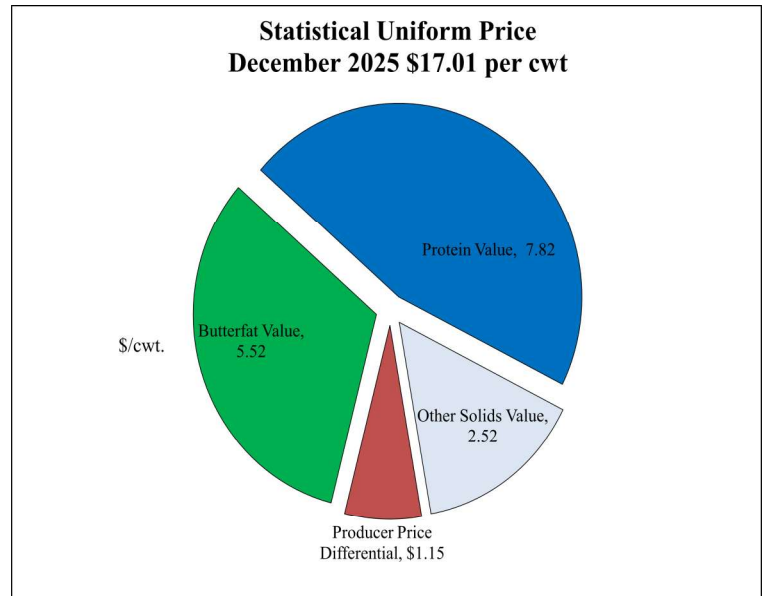
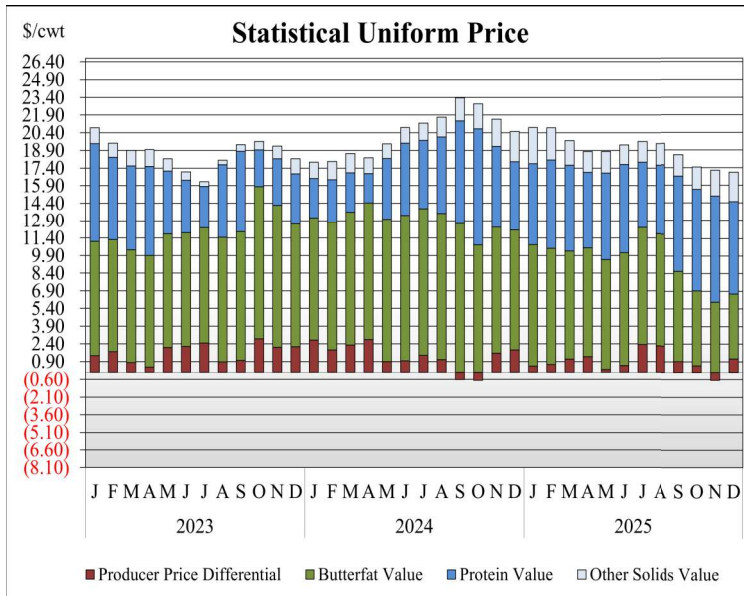
PRODUCER MILK CLASSIFICATION



Producer Receipts: Producer receipts for the Mideast Order totaled 1.697 billion pounds in December 2025. The pounds allocated to Class I represented 35.2 percent of the total pounds. Producer receipts increased 191.9 million pounds compared to November 2025, and were up 163.3 million pounds from the prior year.

Class I Pounds: Class I Disposition for the Mideast Order totaled 669.8 million pounds in December 2025, down 29.8 million pounds from December 2024. Finished products include 211.9 million pounds used for whole milk, 288.4 million pounds of reduced fat and low fat milk, and 20.8 million pounds of fat free (skim) milk.

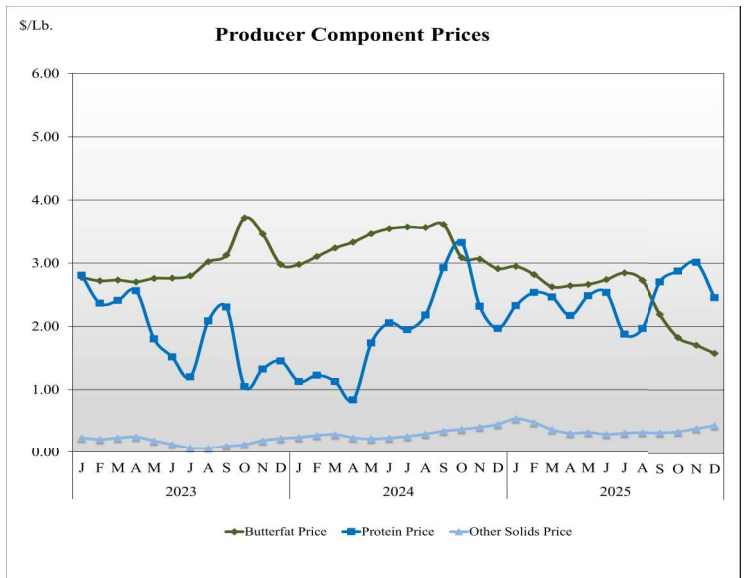
STATISTICAL UNIFORM PRICE



Statistical Uniform Price: The Mideast Federal Order Statistical Uniform Price (SUP) at Cuyahoga County, OH is \$17.01 per cwt for December 2025. The December 2025 SUP is \$0.49 per cwt higher than the November 2025 SUP and \$3.50 per cwt lower than the December 2024 SUP.

December 2025 Statistical Uniform Price: Using the Class III Price formula at 3.5% BF, the component values for the December 2025 SUP are: \$7.82 per cwt for protein, \$5.52 per cwt for butterfat and \$2.52 per cwt for other solids. Also included in the SUP is the \$1.15 per cwt producer price differential. (May not add to total due to rounding)

CLASS AND COMPONENT PRICES



WEIGHTED AVERAGE NATIONAL PRODUCT PRICES

