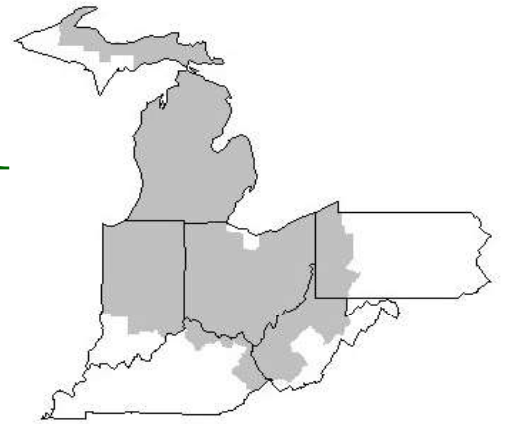


# Mideast Market Administrator's Bulletin



## Federal Order No. 33

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**MARCH 2026**

### 2025 Dairy Situation Recap

In 2025, there was remarkable production growth in the U.S. dairy sector. The dairy herd averaged almost 9.5 million head—the largest since the early 1990s. After recovering from Highly Pathogenic Avian Influenza (HPAI) outbreaks in late 2024 and early 2025, milk per cow averaged 24,391 pounds per cow, about 1.2 percent year-over-year higher, adjusting for the extra day in 2024. Consequently, total milk output increased 2.8 percent, the highest year-over-year gain since 2006. With lower dairy heifer replacement inventories, the expansion of the dairy herd was attained via reduced slaughter rates, as dairy farmers chose to keep their dairy cows longer, incentivized by robust demand for beef-on-dairy calves. In 2025, dairy herds in Idaho, Texas, Kansas, South Dakota, Michigan, and New York all grew by more than 10,000 head, increasing by a total of 155,000 head from 2024, according to each state's annual average cow inventory on the Milk Production report. These States are expanding or have recently expanded dairy processing capacity.

Milk components continued to test at higher levels. The milk-fat test as reported by USDA, National Agricultural Statistics Service (NASS) averaged 4.32 percent in 2025, while the skim-solids test reported by USDA, Agricultural Marketing Service (AMS) averaged 9.12 percent. Milk fat production increased by 4.8 percent while production of skim solids increased by 3.3 percent from 2024.

The all-milk price in 2025 averaged \$21.17 per hundredweight (cwt), \$1.38 lower than 2024. In 2025, the farm milk margin above the feed costs reported by the Dairy Margin Coverage Program (DMC) was above the \$9.50 per cwt threshold that triggers payments for dairy producers who choose the highest levels of coverage for most of the year, except for December when it was slightly below this level.

Increased milk supply led to higher production of butter, cheese, lactose, and whey protein concentrate in 2025. However, strong domestic demand for dairy protein and lactose shifted some whey away from dry whey, resulting in lower dry whey production of those products. Wholesale prices for the main dairy products generally reflected these changes in production. Wholesale butter, cheese, and nonfat dry milk (NDM) prices finished the year lower, resulting in a year-over-year decrease in their 2025 average. However, with a varying pattern throughout the year, the monthly prices for dry whey resulted in a higher year-over-year average in 2025 than 2024. Declining prices for butter and cheese enhanced international competitiveness, driving record export levels for these products. Meanwhile, domestic prices for dry whey and nonfat dry milk remained at or above international export prices benchmarks.

### Recent Wholesale Dairy Product Prices

Butter, cheddar cheese, and nonfat dry milk (NDM) prices reported in the USDA National Dairy Products Sales Report (NDPSR) increased from the week ending February 7 to the week ending March 7. Prices for butter and NDM had the largest increase (+27.66 cents per pound and +27.93 cents per pound, respectively). The price for dry whey registered the only decline (- 0.46 cents per pound).

During the week ending March 13, Chicago Mercantile Exchange (CME) spot prices in dollars per pound averaged as follows: Cheddar cheese 500-pound barrels and 40-pound blocks averaged \$1.5390 and \$1.5465 per pound, respectively. NDM, butter, and dry whey averaged \$1.7280, \$1.8930, and \$0.6460 per pound, respectively.

U.S. wholesale butter averaged \$1.6966 per pound in February, considerably lower than USDA Dairy Market News (DMN)-reported export prices for Oceania (\$2.68 per pound) and Western Europe (\$2.27 per pound). The February wholesale price for U.S. Cheddar cheese (\$1.4338 per pound) was also low relative to Oceania export price (\$2.14 per pound). The DMN Western Europe export price for dry whey in February was \$0.60 per pound, below the U.S. domestic price for dry whey (\$0.6931 per pound). Conversely, the February domestic average wholesale price for NDM (\$1.3726 per pound) was above the dry skim milk powder (SMP) export prices for Oceania and Western Europe, which averaged \$1.32 and \$1.27 per pound, respectively.

*Livestock, Dairy, and Poultry Outlook: March 2026, LDP-M-381, March 16, 2026  
 USDA, Economic Research Service*

### February 2026 Pool Summary

#### Classification of Producer Milk

	Pounds	Percent
Class I	547,961,890	31.2
Class II	389,859,231	22.2
Class III	613,339,303	34.9
Class IV	207,897,058	11.8
Total	1,759,057,482	100.0

#### Producer Prices

Producer Price Differential	\$1.50 / cwt
Butterfat Price	1.7794 / lb
Protein Price	1.9373 / lb
Other Solids Price	0.4391 / lb
Somatic Cell Adjustment Rate	0.00072 / cwt
Statistical Uniform Price	16.44 / cwt

**ANNOUNCEMENT OF PRODUCER PRICES**  
**Federal Order No. 33**  
**FEBRUARY 2026**  
**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			535,349,708			\$13.79 / cwt	\$73,824,724.73
Class I Butterfat		12,612,182				1.4826 / lb	18,698,821.03
Class I Location Differential	547,961,890						(1,213,969.07)
Class II SNF Value				35,240,935		1.0129 / lb	35,695,543.06
Class II Butterfat		24,947,451				1.7864 / lb	44,566,126.45
Class III Protein Value			21,212,861			1.9373 / lb	41,095,675.64
Class III Other Solids Value					35,624,047	0.4391 / lb	15,642,519.03
Class III Butterfat		23,528,831				1.7794 / lb	41,867,201.82
Class IV SNF Value				18,396,844		1.1220 / lb	20,641,258.97
Class IV Butterfat		17,482,527				1.7794 / lb	31,108,408.55
Somatic Cell Value II/III/IV							1,647,175.02
<b>TOTAL PRODUCER MILK VALUE</b>	<b>1,759,057,482</b>	<b>78,570,991</b>	<b>60,446,092</b>	<b>162,140,438</b>	<b>101,694,346</b>		<b>\$323,573,485.23</b>
<b>TOTAL ADJUSTMENTS</b>							<b>\$1,087,065.73</b>
<b>TOTAL HANDLER OBLIGATIONS</b>							<b>\$324,660,550.96</b>
Total Protein Value			60,446,092			1.9373 / lb	\$117,102,214.03
Total Other Solids Value					101,694,346	0.4391 / lb	44,653,987.33
Butterfat Value		78,570,991				1.7794 / lb	139,809,221.39
Total Somatic Cell Values							2,376,568.15
<b>TOTALS</b>							<b>\$20,718,560.06</b>
Net Producer Location Adjustments							\$5,289,121.54
1/2 Unobligated Balance Producer Settlement Fund							1,212,000.00
Total - Divided by Total Pounds	1,759,069,941					\$1.547391	\$27,219,681.60
Rate of Cash Reserve						<u>(0.047391)</u>	<u>(833,632.57)</u>
<b>PRODUCER PRICE DIFFERENTIAL at Cuyahoga County, OH <sup>1</sup></b>						<b>\$1.50 / cwt</b>	<b>\$26,386,049.03</b>

**COMPONENT PRICES**

**COMPUTATION OF UNIFORM PRICE**

	<b>February</b>			<b>February</b>	
	<u>2026</u>	<u>2025</u>		<u>2026</u>	<u>2025</u>
Butterfat Price	\$1.7794 / lb	\$2.8186 / lb	Class III Price - 3.5% BF	\$14.94	\$20.34
Protein Price	1.9373 / lb	2.5337 / lb	Producer Price Differential*	<u>1.50</u>	<u>0.51</u>
Other Solids Price	0.4391 / lb	0.4799 / lb	Statistical Uniform Price	\$16.44	\$20.85
Somatic Cell Adjustment Rate	0.00072 / cwt	0.00095 / cwt			
Nonfat Solids Price <sup>2</sup>	1.1220 / lb	1.1552 / lb			

**CLASS PRICES**

**CLASSIFICATION OF PRODUCER MILK**

	<b>February</b>			<b>February</b>	
	<u>2026</u>	<u>2025</u>		<u>2026</u>	<u>2025</u>
Class I*	\$18.50	\$23.27	Class I	Product lbs. 547,961,890	Product lbs. 559,223,884
Class II	15.34	21.08	Class II	389,859,231	308,010,551
Class III	14.94	20.18	Class III	613,339,303	604,883,192
Class IV	16.29	19.90	Class IV	<u>207,897,058</u>	<u>204,774,111</u>
			Total	1,759,057,482	1,676,891,738

<sup>1</sup> Subject to Location Adjustment.

<sup>2</sup> Producers are not paid on this component.

**ORDER 33 MARKET SUMMARY**

The Producer Price Differential for the Mideast Marketing Area for February 2026 was \$1.50 and the Statistical Uniform Price was \$16.44 for the month. The Statistical Uniform Price is \$0.52 higher than last month and is \$4.38 lower than February 2025. The Producer Butterfat Price of \$1.7794 per pound increased \$0.3269 from January and is down \$1.0392 from a year ago. The Protein Price of \$1.9373 is down \$0.2395 from last month and is down \$0.5964 from February 2025. The Other Solids Price in February was \$0.4391 per pound, a decrease from last month's price of \$0.4448 and \$0.0408 lower than last February. The Somatic Cell Adjustment rate for February was \$0.00072 per cwt.

February producer receipts of 1.76 billion pounds were 7.4 percent lower than January's and 4.9 percent higher than February 2025's production of 1.68 billion pounds. Producer milk allocated to Class I accounted for 31.2 percent of the total producer milk in February 2026, lower than 32.2 percent in January, and lower than 33.4 percent in February 2025. A total of 3,336 producers were pooled on the Mideast Order compared to 3,339 producers pooled in February 2025. The market average content of producer milk was as follows: Butterfat 4.47%; Protein 3.44%; Other Solids 5.78% and Nonfat Solids 9.22%.

### January 2025 Highlights

**Total cheese** output (excluding cottage cheese) was 1.28 billion pounds, 4.7 percent above January 2025 and 0.1 percent above December 2025.

**Italian type cheese** production totaled 554 million pounds, 6.5 percent above January 2025 but 1.6 percent below December 2025.

**American type cheese** production totaled 500 million pounds, 3.9 percent above January 2025 and slightly above December 2025.

**Butter production** was 231 million pounds, 6.0 percent above January 2025 and 11.5 percent above December 2025.

**Dry milk products** (comparisons in percentage with January 2025)  
 Nonfat dry milk, human - 145 million pounds, down 6.4 percent.  
 Skim milk powder - 41.8 million pounds, up 21.2 percent.

**Whey products** (comparisons in percentage with January 2025)  
 Dry whey, total - 77.4 million pounds, up 7.5 percent.  
 Lactose, human and animal - 94.9 million pounds, up 2.0 percent.  
 Whey protein concentrate, total - 40.2 million pounds, up 4.3 percent.

**Frozen products** (comparisons in percentage with January 2025)  
 Ice cream, regular (hard) - 57.7 million gallons, down 3.1 percent.  
 Ice cream, lowfat (total) - 29.6 million gallons, up 1.1 percent.  
 Sherbet (hard) - 1.62 million gallons, up 4.3 percent.  
 Frozen yogurt (total) - 2.22 million gallons, down 41.9 percent.

*Released March 5, 2026, by the National Agricultural Statistics Service (NASS), Agricultural Statistics Board, United States Department of Agriculture (USDA).*

### January Milk Production Up 3.4 Percent

Milk production in the 24 major States during January totaled 19.1 billion pounds, up 3.4 percent from January 2025. December revised production, at 18.8 billion pounds, was up 4.4 percent from December 2024. The December revision represented a decrease of 36 million pounds or 0.2 percent from last month's preliminary production estimate. Production per cow in the 24 major States averaged 2,066 pounds for January, 7 pounds above January 2025. The number of milk cows on farms in the 24 major States was 9.15 million head, up 200,000 head from January 2025, and up 15,000 head from December 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 January totaled 2.79 billion pounds, up 37 million pounds or 1.3 percent from January 2025. Production per cow in the Mideast states averaged 2,041 pounds for January, 8 pounds more than January 2025. The number of cows on farms in the Mideast states was 1.37 million head, 15,000 head more than January 2025.

*Released February 20, 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)	January 2026 -----Weighted Averages-----				January 2025 -----Weighted Averages-----				
			Butterfat	Protein	Other Solids	SCC (000)	Pounds of Milk (000)	Butterfat	Protein	Other Solids	SCC (000)
Michigan	729	1,002,201	4.49	3.44	5.78	151	813,118	4.44	3.39	5.81	159
Ohio	1,105	431,876	4.50	3.48	5.78	163	381,116	4.48	3.41	5.78	174
Indiana	598	303,965	4.42	3.42	5.79	165	267,435	4.38	3.33	5.73	183
Pennsylvania	638	80,479	4.59	3.46	5.83	199	78,031	4.36	3.27	5.69	198
New York	668	87,784	4.57	3.42	5.84	189	41,300	4.69	3.48	5.92	151
Other	99	53,693	4.49	3.33	5.59	168	39,204	4.50	3.40	5.79	181
<b>Total/Average *</b>	<b>3,345</b>	<b>1,900,190</b>	<b>4.50</b>	<b>3.47</b>	<b>5.77</b>	<b>159</b>	<b>1,620,204</b>	<b>4.44</b>	<b>3.38</b>	<b>5.79</b>	<b>169</b>

\* 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  
February 2026**

Marketing Area <sup>1/</sup>	Producer Milk		Class I	Producer Price Differential (per cwt.)	Statistical Uniform Price (per cwt.)
	Total (000)	Class I (000)	Percent %		
FO 1 Northeast - (Boston)	2,135,516	612,580	28.7	2.37	\$17.31
FO 5 Appalachian - (Charlotte)	393,871	290,391	73.7	2/	19.69
FO 6 Florida - (Tampa)	215,077	169,907	79.0	2/	20.65
FO 7 Southeast - (Atlanta)	253,348	192,867	76.1	2/	20.14
FO 30 Upper Midwest - (Chicago)	1,548,534	154,492	10.0	0.58	15.52
FO 32 Central - (Kansas City)	1,090,150	334,408	30.7	1.39	16.33
<b>FO 33 Mideast - (Cleveland)</b>	<b>1,759,057</b>	<b>547,962</b>	<b>31.2</b>	<b>1.50</b>	<b>16.44</b>
FO 51 California - (Los Angeles)	1,566,938	362,363	23.1	1.10	16.04
FO 124 Pacific Northwest - (Seattle)	218,917	74,987	34.3	1.53	16.47
FO 126 Southwest - (Dallas)	1,073,797	315,114	29.3	1.61	16.55
FO 131 Arizona - (Phoenix)	350,540	98,394	28.1	2/	16.26

<sup>1/</sup> Names in parentheses are principal points of markets.

<sup>2/</sup> Producers in these markets are paid on the basis of a uniform skim and butterfat price.

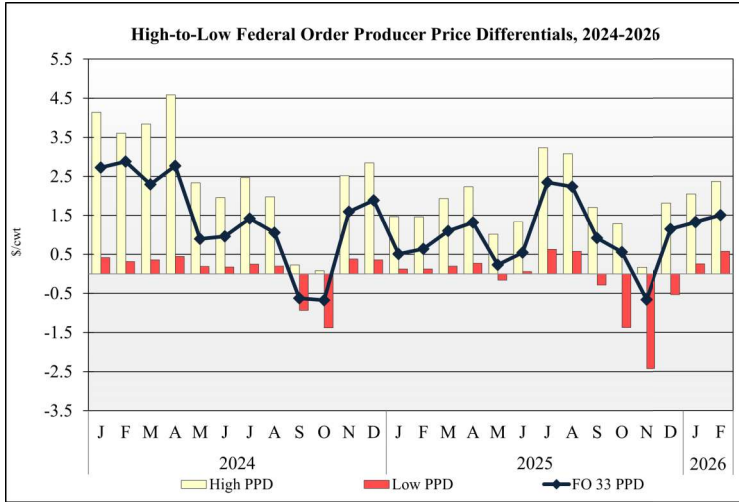
**MINIMUM PARTIAL PAYMENT PRICE FOR MARCH 2026.....\$14.94/cwt.**



# Mideast Market Administrator's Bulletin

Federal Order No. 33 Supplement  
March 2026

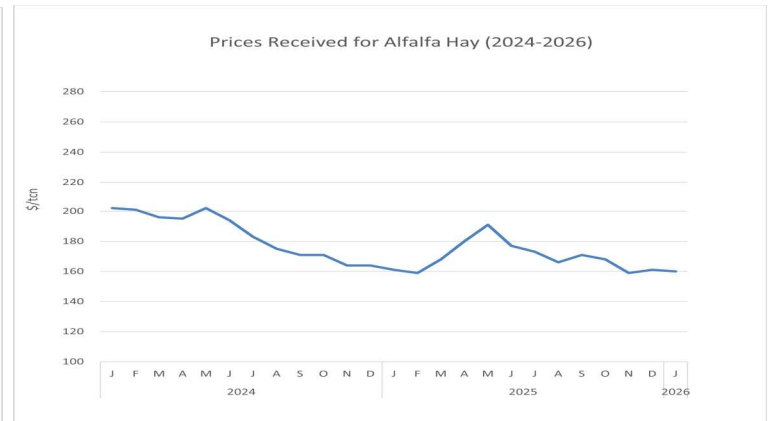
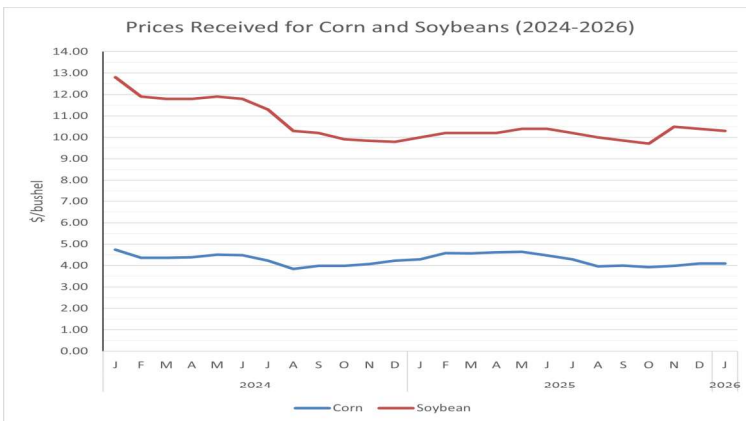
## PRODUCER PRICE DIFFERENTIAL AND UNIFORM PRICE STATISTICS 2/ 3/



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 February 2026 Federal Order 1 had a PPD of \$2.37 per hundredweight (cwt), \$0.32 lower than their January 2026 PPD. In February 2026, Federal Order 33 had the fourth highest PPD, behind Order 1, Order 126, and Order 124, respectively, at \$1.50 per cwt, \$0.17 per cwt higher than their January 2026 PPD. For February 2026, Federal Order 30 had the lowest PPD at \$0.58 per cwt, \$0.12 higher than their January 2026 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 February 2026, Federal Order 6 had a SUP of \$20.65 per cwt, 0.65 lower than their January 2026 SUP. For February 2026, Federal Order 33 had a SUP of \$16.44 per cwt, \$0.52 per cwt higher than their January 2026 SUP. For February 2026, Federal Order 30 had the lowest SUP at \$15.52 per cwt, \$0.47 per cwt higher than their January 2026 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