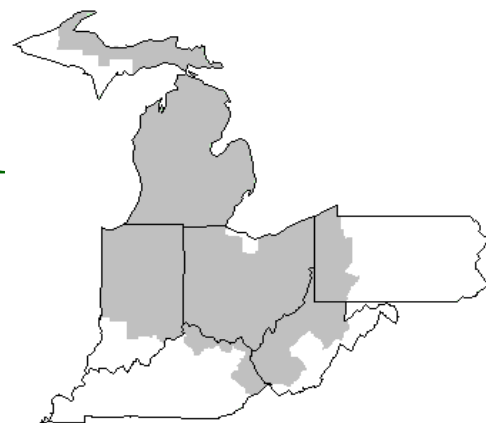


Mideast Market Administrator's Bulletin



Federal Order No. 33

Scott C. Jones, Market Administrator

Phone: (330) 225-4758 Toll Free: (888) 751-3220

Email: mideastorder@fmmacleev.com

WebPage: www.fmmacleev.com

APRIL 2025

Dairy Forecasts for 2025

Following recent inventory data, the forecast for the average number of cows in the U.S. herd has been raised from the previous forecast by 5,000 head in the first quarter. The national milking herd is projected to average 9.380 million head in 2025. The forecast for milk per cow has been reduced by 80 pounds to 24,120 pounds. These reductions reflect, in part, the retention of the older cow in the production cycle as well as stronger-than-average growth in milk fat. Milk production in 2025 is forecast now at 226.2 billion pounds, a reduction of 0.7 billion pounds from the last forecast as the reduction in milk per cow is expected to offset the slightly higher number of dairy cows.

The dairy import forecast for 2025 was unchanged on a milk-fat basis at 8.9 billion pounds but lowered to 7.0 billion pounds (-0.2 billion) on a skim-solids basis. Lower imports for butter, milk protein concentrate, and condensed and evaporated milk are expected to be partially offset by higher imports of other dairy products.

The 2025 dairy export forecasts were decreased on both bases from last month's forecast. On a milk-fat basis, 2025 dairy exports are forecast at 11.7 (-0.1) billion pounds, while on a skim solids basis, the 2025 dairy export forecast was revised downward to 47.5 (-1.2) billion pounds. This forecast adjustment takes into consideration the most recent trade data and the lack of price competitiveness for some dairy products, such as dry whey and uncertainty around export potential to our main markets. Lower shipments are expected across most dairy products.

With lower projected prices for dairy products, the 2025 forecasts for domestic use are adjusted upward relative to last month's projection as follows: On a skim-solids basis, domestic disappearance is forecast as 184.3 (+0.3) billion pounds, and on a milk-fat basis, it is forecast at 223.1 (+0.1) billion pounds.

Based on recent movements in the wholesale prices for the main dairy products and relatively strong year-over-year increases January ending stocks for butter and dry skim milk products, the 2025 average price forecasts have been adjusted from the last's month's projections. Wholesale price forecasts for Cheddar cheese, dry whey, butter, and NDM have been decreased to \$1.810 (-7.0 cents), \$0.525 (-8.0 cents), \$2.515 (-13.0 cents), and \$1.255 (-4.0 cents) per pound, respectively.

The lower product price forecasts support downward revisions for milk class prices as follows: for Class III milk to \$17.95 (-\$1.15) per cwt, and for Class IV to \$18.80 (-\$0.90) per cwt. The all milk price for 2025 is now forecast at \$21.60, down \$1.00 from last month's forecast.

Export and Import Happenings

In January 2025, dairy product exports varied compared to the same month a year ago. On a milk-fat equivalent basis, they totaled 1.118 billion pounds, 303 million higher than January 2024. On a skim-solids milk-equivalent basis, they totaled 3.597 billion pounds, 184 million lower than January 2024. Compared to January 2024, in January 2025 dairy products with a notable increase in export volumes were cheese, dry whey products, and butter, while exports for dry skim milk powder and lactose declined.

In January 2025, dairy product imports totaled 777 million pounds on a milk-fat basis, 118 million higher than January 2024. On a skim-solids basis, January imports totaled 603 million pounds, 2 million below January 2024. Compared to a year ago, in January 2025, dairy products with a notable increase in import volumes were butter-fat products and cheese. In the same period, dairy products with a notable decrease in imports were casein and infant formula.

From November to January, domestic use totaled 55.182 billion pounds on a milk-fat basis, 368 million pounds below the same period a year ago. Meanwhile, on a skim-solids basis, domestic use for November to January totaled 45.637 billion pounds, 248 million lower than the same period a year ago. However, domestic use is expected to increase on both a milk-fat and skim solids basis throughout 2025, supp

Livestock, Dairy, and Poultry Outlook: March 2025, LDP-M-369, March 17, 2025

March 2025 Pool Summary

Classification of Producer Milk

	<i>Pounds</i>	<i>Percent</i>
Class I	588,097,571	33.1
Class II	249,149,083	14.0
Class III	671,902,197	37.9
<u>Class IV</u>	<u>266,086,182</u>	<u>15.0</u>
Total	1,775,235,033	100.0

Producer Prices

Producer Price Differential	\$1.10 / cwt
Butterfat Price	2.6242 / lb
Protein Price	2.4606 / lb
Other Solids Price	0.3647 / lb
Somatic Cell Adjustment Rate	0.00091 / cwt
Statistical Uniform Price	19.72 / cwt

ANNOUNCEMENT OF PRODUCER PRICES
Federal Order No. 33
MARCH 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			574,716,518			\$13.45 / cwt	\$ 77,299,371.67
Class I Butterfat		13,381,053				2.8684 / lb	38,382,212.43
Class I Location Differential	588,097,571						(349,643.25)
Class II SNF Value				21,805,191		1.2567 / lb	27,402,583.53
Class II Butterfat		20,364,763				2.6312 / lb	53,583,764.38
Class III Protein Value			22,533,375			2.4606 / lb	55,445,622.55
Class III Other Solids Value					38,828,547	0.3647 / lb	14,160,771.08
Class III Butterfat		26,330,338				2.6242 / lb	69,096,072.97
Class IV SNF Value				23,727,577		1.0393 / lb	24,660,070.79
Class IV Butterfat		17,365,614				2.6242 / lb	45,570,844.26
Somatic Cell Value II / III / IV							2,063,502.64
TOTAL PRODUCER MILK VALUE	1,775,235,033	77,441,768	59,292,792		102,435,341		\$ 407,315,173.05
Overages						91,942.86	
Beginning Inventory & OS Charges						(84,989.34)	
TOTAL ADJUSTMENTS							\$ 6,953.52
TOTAL HANDLER OBLIGATIONS							\$ 407,322,126.57
Total Protein Value			59,292,792 lbs	@	\$2.4606		\$(145,895,843.98)
Total Other Solids Value			102,435,341 lbs	@	0.3647		(37,358,168.84)
Butterfat Value			77,441,768 lbs	@	2.6242		(203,222,687.58)
Total Somatic Cell Values							(3,039,114.25)
TOTALS							\$ 17,806,311.92
Net Producer Location Adjustments							\$ 1,828,853.94
1/2 Unobligated Balance Producer Settlement Fund							777,000.00
Total - Divided by Total Pounds			1,775,242,151 lbs		1.1098243		\$ 20,412,165.86
Rate of Cash Reserve					(0.0498243)		(884,502.15)
PRODUCER PRICE DIFFERENTIAL at Cuyahoga County, OH ¹			1,775,242,151		\$ 1.10 /cwt		\$ 19,527,663.71

COMPONENT PRICES

	<u>2025</u>	<u>2024</u>
Butterfat Price	\$2.6242 / lb	\$3.2385 / lb
Protein Price	2.4606 / lb	1.1265 / lb
Other Solids Price	0.3647 / lb	0.2881 / lb
Somatic Cell Adjustment Rate	0.00091 / cwt	0.00080 / cwt
Nonfat Solids Price ²	1.0393 / lb	1.0083 / lb

COMPUTATION OF UNIFORM PRICE

	<u>2025</u>	<u>2024</u>
Class III Price - 3.5% BF	\$18.62	\$16.34
Producer Price Differential*	<u>1.10</u>	<u>2.30</u>
Statistical Uniform Price	\$19.72	\$18.64

CLASS PRICES

	<u>2025</u>	<u>2024</u>
Class I*	\$23.02	\$20.80
Class II	20.12	21.12
Class III	18.62	16.34
Class IV	18.21	20.09

CLASSIFICATION OF PRODUCER MILK

	<u>2025</u>	<u>2024</u>
	<i>Product lbs.</i>	<i>Product lbs.</i>
Class I	588,097,571	587,353,441
Class II	249,149,083	167,943,225
Class III	671,902,197	704,108,859
<u>Class IV</u>	<u>266,086,182</u>	<u>61,370,339</u>
Total	1,775,235,033	1,520,775,864

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 March 2025 was \$1.10 and the Statistical Uniform Price was \$19.72 for the month. The Statistical Uniform Price is \$1.10 lower than last month, and is \$1.08 higher than March 2024. The Producer Butterfat Price of \$2.6242 per pound decreased \$0.1944 from February and is down \$0.6143 from a year ago. The Protein Price of \$2.4606 is down \$0.0731 from last month and is up \$1.3341 from March 2024. The Other Solids Price in March was \$0.3647 per pound, a decrease from last month's price of \$0.4799 and \$0.0766 higher than last March. The Somatic Cell Adjustment rate for March was \$0.00091 per cwt. March producer

receipts of 1.78 billion pounds were 5.9 percent higher than February and 16.7 percent higher than March 2024 production of 1.52 billion pounds. Producer milk allocated to Class I accounted for 33.1 percent of the total producer milk in March 2025, lower than 33.4 percent in February, and lower than 38.6 percent in March 2024. A total of 3,299 producers were pooled on the Mideast Order compared to 3,292 producers pooled in March 2024.

The market average content of producer milk was as follows: Butterfat 4.36 %; Protein 3.34 %; Other Solids 5.77 % and Nonfat Solids 9.11 %.

February 2025 Highlights

Total cheese output (excluding cottage cheese) was 1.11 billion pounds, 2.2 percent below February 2024 and 8.7 percent below January 2025.

Italian type cheese production totaled 474 million pounds, 0.5 percent below February 2024 and 8.8 percent below January 2025.

American type cheese production totaled 441 million pounds, 1.3 percent below February 2024 and 8.5 percent below January 2025.

Butter production was 203 million pounds, 2.6 percent above February 2024 but 7.1 percent below January 2025.

Dry milk products (comparisons in percentage with February 2024) Nonfat dry milk, human - 147 million pounds, down 0.3 percent. Skim milk powder – 30.8 million pounds, down 15.1 percent.

Whey products (comparisons in percentage with February 2024) Dry whey, total – 60.1 million pounds, down 16.7 percent. Lactose, human and animal – 83.9 million pounds, down 4.2 percent. Whey protein concentrate, total – 36.1 million pounds, down 6.8 percent.

Frozen products (comparisons in percentage with February 2024) Ice cream, regular (hard) – 55.6 million gallons, down 3.0 percent. Ice cream, lowfat (total) – 30.5 million gallons, down 2.9 percent. Sherbet (hard) – 1.45 million gallons, down 5.3 percent. Frozen yogurt (total) - 4.11 million gallons, up 2.7 percent.

Released April 4, 2025, by the National Agricultural Statistics Service (NASS), Agricultural Statistics Board, United States Department of Agriculture (USDA).

February Milk Production Down 2.6

Milk production in the 24 major States during February totaled 17.0 billion pounds, down 2.6 Percent from February 2024. However, production was 0.9 percent above last year after adjusting for the leap year. January revised production, at 18.4 billion pounds, was up 0.6 percent from January 2024. The January revision represented an increase of 72 million pounds or 0.4 percent from last month's preliminary production estimate.

Production per cow in the 24 major States averaged 1,895 pounds for February, 66 pounds below February 2024.

The number of milk cows on farms in the 24 major States was 8.96 million head, 75,000 head more than February 2024, and 13,000 head more than January 2025.

The Mideast Marketing Area has four states represented in the 23 major states used above. They are Indiana, Michigan, Ohio, and Pennsylvania. Milk production in these Mideast states during February totaled 2.5 billion pounds, down 50 million pounds or 1.9 percent from February 2024.

Production per cow in the Mideast states averaged 1,850 pounds for February, 41 pounds less than February 2024.

The number of cows on farms in the Mideast states was 1.4 million head, 3,000 head more than February 2024.

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

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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)	February 2025 -----Weighted Averages-----				February 2024 -----Weighted Averages-----				
			Butterfat	Protein	Other Solids	SCC (000)	Pounds of Milk (000)	Butterfat	Protein	Other Solids	SCC (000)
Michigan	706	849,188	4.44	3.40	5.81	158	587,616	4.23	3.28	5.79	154
Ohio	1,126	389,028	4.44	3.40	5.78	167	339,642	4.17	3.25	5.73	173
Indiana	578	282,924	4.38	3.33	5.73	174	178,810	4.29	3.32	5.93	181
Pennsylvania	638	75,780	4.32	3.25	5.69	189	73,657	4.21	3.19	5.68	208
New York	121	43,493	4.68	3.46	5.91	148	25,996	4.59	3.44	6.00	178
Other	163	36,514	4.48	3.37	5.80	177	65,052	4.40	3.33	5.77	156
Total/Average *	3,332	1,676,928	4.43	3.38	5.79	164	1,270,773	4.24	3.28	5.79	167

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



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**FEDERAL ORDER DATA
March 2025**

Marketing Area ^{1/}	Producer Milk		Class I	Producer Price Differential (per cwt.)	Statistical Uniform Price (per cwt.)
	Total (000)	Class I (000)	Percent %		
FO 1 Northeast - (Boston)	2,398,071	656,312	27.4	\$1.94	\$20.56
FO 5 Appalachian - (Charlotte)	450,489	299,210	66.4	^{2/}	22.60
FO 6 Florida - (Tampa)	221,544	171,376	77.4	^{2/}	24.66
FO 7 Southeast - (Atlanta)	303,471	208,590	68.7	^{2/}	23.18
FO 30 Upper Midwest - (Chicago)	2,627,380	152,611	5.8	0.20	18.82
FO 32 Central - (Kansas City)	1,400,503	344,036	24.6	0.45	19.07
FO 33 Mideast - (Cleveland)	1,775,235	588,098	33.1	1.10	19.72
FO 51 California - (Los Angeles)	3,081,370	393,087	12.8	0.46	19.08
FO 124 Pacific Northwest - (Seattle)	692,477	116,893	16.9	0.34	18.96
FO 126 Southwest - (Dallas)	1,429,604	320,867	22.4	1.20	19.82
FO 131 Arizona - (Phoenix)	427,121	106,574	25.0	^{2/}	19.96

^{1/} Names in parentheses are principal points of markets.

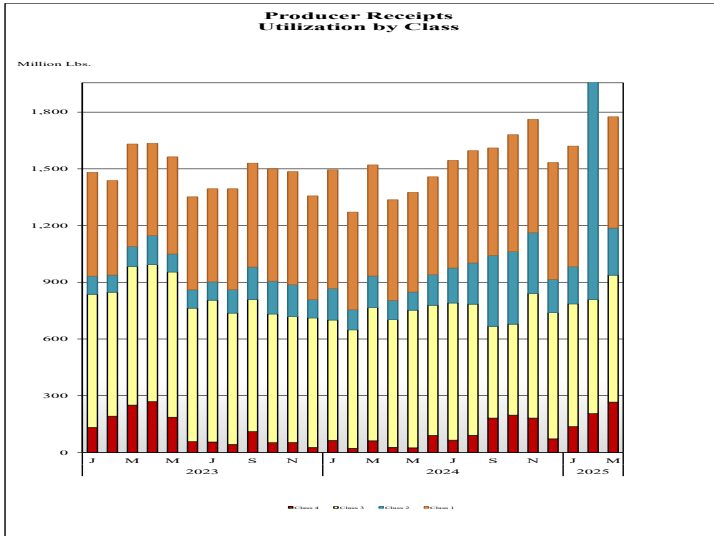
^{2/} Producers in these markets are paid on the basis of a uniform skim and butterfat price.

MINIMUM PARTIAL PAYMENT PRICE FOR APRIL 2025.....\$18.21 /cwt.

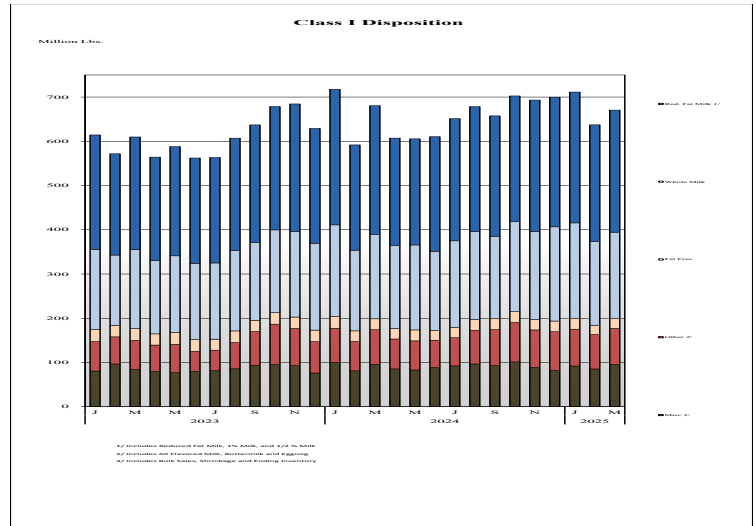
Mideast Market Administrator's Bulletin

Federal Order No. 33 Supplement
April 2025

PRODUCER MILK CLASSIFICATION

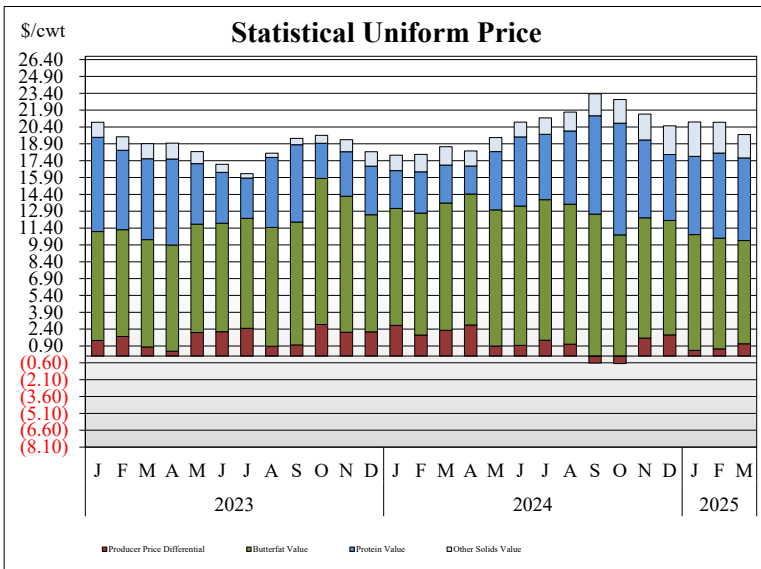


Producer Receipts: Producer receipts for the Mideast Order totaled 1.78 billion pounds in March 2025. The pounds allocated to Class I represented 33.1 percent of the total pounds. Producer receipts increased 98.3 million pounds compared to February 2025, and were up 254.5 million pounds from the prior year.

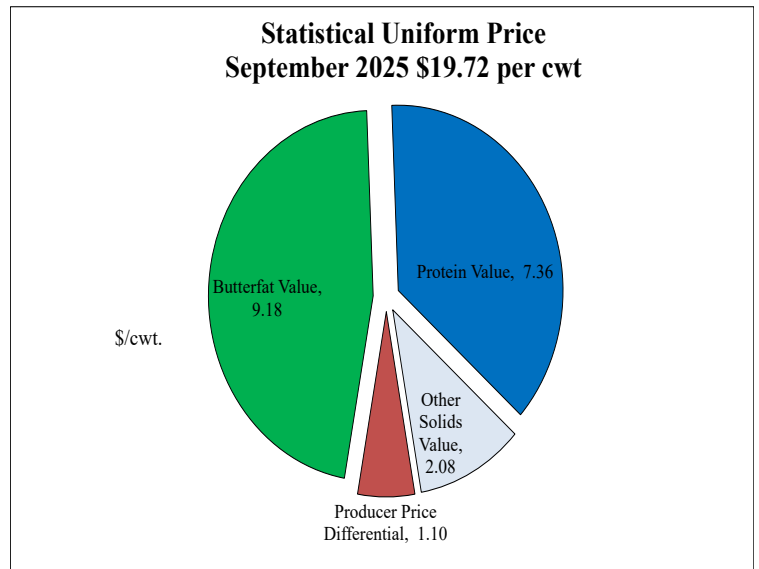


Class I Pounds: Class I Disposition for the Mideast Order totaled 670.5 million pounds in March 2025, down 10.0 million pounds from March 2024. Finished products include 195.3 million pounds used for whole milk, 276.0 million pounds of reduced fat and low fat milk, and 22.1 million pounds of fat free (skim) milk.

STATISTICAL UNIFORM PRICE

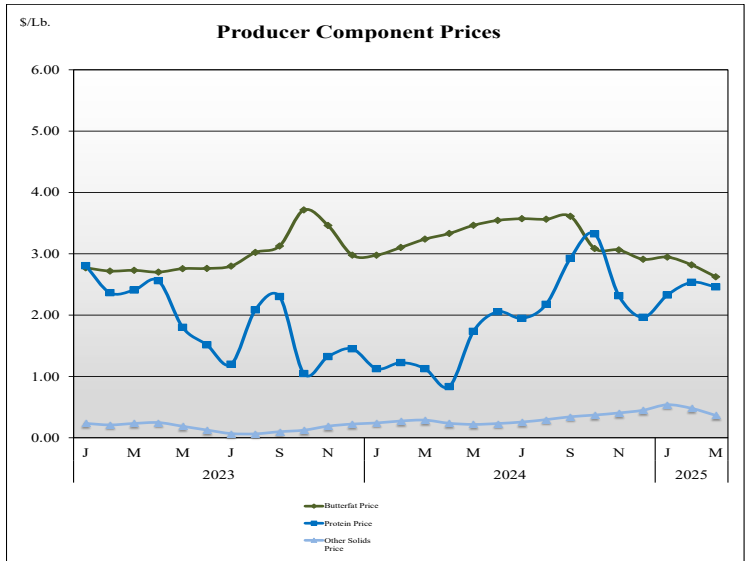


Statistical Uniform Price: The Mideast Federal Order Statistical Uniform Price (SUP) at Cuyahoga County, OH was \$19.72 per cwt for March 2025. The March 2025 SUP was \$1.08 per cwt higher than the March 2024 SUP. The March 2025 SUP is \$1.10 per cwt lower than the February 2025 SUP.



March 2025 Statistical Uniform Price: Using the Class III Price formula at 3.5% BF, the component values for the March 2025 SUP are: \$7.36 per cwt for protein, \$9.18 per cwt for butterfat and \$2.08 per cwt for other solids. Also included in the SUP is the \$1.10 per cwt producer price differential. (May not add to total due to rounding.)

CLASS AND COMPONENT PRICES



WEIGHTED AVERAGE NATIONAL PRODUCT PRICES

