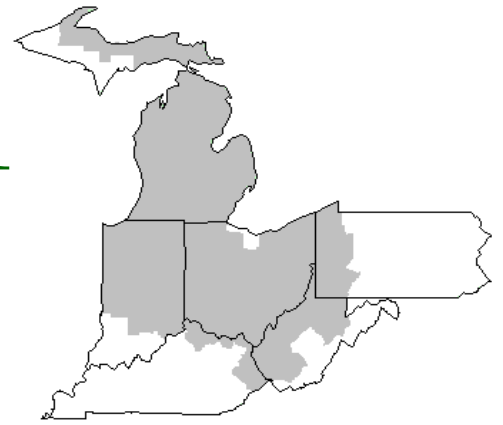


Mideast Market Administrator's Bulletin



Federal Order No. 33

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AUGUST 2025

Dairy Forecast for 2025

Based on recent data concerning cow numbers and dairy slaughter, the 2025 forecast for the annual average number of dairy cows has been revised upward by 15,000 head to 9.435 million. The forecast for milk per cow is forecast at 24,200 pounds, 15 pounds higher than the previous forecast. Consequently, milk production in 2025 is now forecast at 228.3 billion pounds, an increase of 0.5 billion pounds from the last forecast. USDA, NASS will issue its Cattle report on July 25 which will include milk cow inventory data along with dairy replacement heifer numbers. The report will give insight into the current state of the herd and provide information to assist with the outlook for the remainder of 2025 and 2026.

The dairy import forecast for 2025 is lowered 0.1 billion to 8.5 billion pounds on a milk-fat basis and raised 0.1 billion to 6.9 billion pounds on a skim-solid basis. Lower imports are expected for butter, cheese, and milk protein concentrate.

Dairy export forecasts for 2025 are adjusted upward from last month's forecast. On a milk-fat basis, 2025 dairy exports are forecast at 13.8 (+0.2) billion pounds, while on a skim-solids basis the 2025 dairy export forecast was revised to 45.3 (+0.4) billion pounds. These adjustments take into consideration the most recent trade data, relative weakness of the U.S. dollar, and the expectation that domestic prices for butter and cheese maintain their competitive margins in the global markets.

While domestic use for some dairy products has been lower than expected, year-to-date data on domestic use supports upward revisions for the 2025 forecasts. On a milk-fat basis, domestic use in 2025 is projected to 223.0 (+0.2) billion pounds, while on a skim-solids basis it is forecast at 186.8 (+0.1) billion pounds.

Based on recent movement in product prices, the 2025 average price forecasts for butter, NDM, and dry whey have been revised upward as follows: \$2.560 (+2.5 cents), \$1.260 (+1.0 cents), and \$0.575 (+1.0 cents) per pound, respectively. Conversely, given recent weaker than expected domestic demand for cheese, the 2025 average price forecast for Cheddar cheese has been lowered to \$1.840 (-2.0 cents) per pound.

The changes in the product price forecasts support revisions for milk class prices as follows: for Class III milk to \$18.50 (-\$0.15) per cwt with the decrease in cheese price more than offsetting the increase in dry whey prices, and for Class IV to \$19.05 (+\$0.20) per cwt with higher prices for both butter and NDM. The all-milk price for 2025 is now forecast at \$22.00 per cwt, 5 cents higher than the previous forecast.

Production Rises as Buyer Sentiment Improves

In May 2025, U.S. milk production totaled 19.930 billion pounds, a 1.6-percent increase over May 2024, according to USDA's National Agricultural Statistics Service. The national dairy herd averaged 9.445 million head—114,000 more than the previous year and up 5,000 from April—and the average milk output per cow rose by 7 pounds year over year to reach 2,110 pounds. Notable increases in cow numbers occurred in states such as Texas, Idaho, Kansas, South Dakota, and Michigan, reflecting ongoing regional expansion and new processing capacity coming online. Milk component production continues to grow. In May, milk fat production increased by 3.3 percent and skim solids by 2.1 percent, both year over year.

According to the National Restaurant Association, the Restaurant Performance Index (RPI) improved from March through May 2025 compared to the same period in 2024, signaling a shift from contraction to slight expansion in the U.S. restaurant industry during the first part of the year. This rebound may indicate renewed demand by foodservice for dairy products, particularly high-milkfat items such as cheese and butter. Although buyer sentiment remains difficult to quantify, domestic use of cheese and butter rose during this three-month period, as previously reported.

Livestock, Dairy, and Poultry Outlook: July 2025, LDP-M-373, July 17, 2025 USDA, Economic Research Service

July 2025 Pool Summary

Classification of Producer Milk

	Pounds	Percent
Class I	555,632,883	31.8
Class II	297,283,804	17.0
Class III	723,919,842	41.4
Class IV	172,346,531	9.9
Total	1,749,183,060	100.0

Producer Prices

Producer Price Differential	\$2.35 / cwt
Butterfat Price	2.8435 / lb
Protein Price	1.8730 / lb
Other Solids Price	0.3092 / lb
Somatic Cell Adjustment Rate	0.00088 / cwt
Statistical Uniform Price	19.67 / cwt

ANNOUNCEMENT OF PRODUCER PRICES
Federal Order No. 33
JULY 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			542,559,597			\$13.46 / cwt	\$73,028,521.76
Class I Butterfat		13,073,286				2.7522 / lb	35,980,297.73
Class I Location Differential	555,632,883						(1,269,667.58)
Class II SNF Value				25,452,570		1.0744 / lb	27,346,241.21
Class II Butterfat		23,775,296				2.8505 / lb	67,771,481.30
Class III Protein Value			22,986,721			1.8730 / lb	43,054,128.46
Class III Other Solids Value					41,979,853	0.3092 / lb	12,980,170.51
Class III Butterfat		25,980,408				2.8435 / lb	73,875,290.15
Class IV SNF Value				15,246,383		1.0286 / lb	15,682,429.54
Class IV Butterfat		8,571,774				2.8435 / lb	24,373,839.34
Somatic Cell Value II/III/IV							1,496,277.61
TOTAL PRODUCER MILK VALUE	1,792,628,576	74,576,084	57,280,349	161,038,494	103,758,145		<u>\$374,319,010.03</u>
TOTAL ADJUSTMENTS							<u>\$1,218,077.90</u>
TOTAL HANDLER OBLIGATIONS							<u>\$375,537,087.93</u>
Total Protein Value			55,198,055			1.8730 / lb	\$103,385,957.02
Total Other Solids Value					100,909,112	0.3092 / lb	31,201,097.43
Butterfat Value		71,400,764				2.8435 / lb	203,028,072.43
Total Somatic Cell Values							2,102,948.41
TOTALS							<u>\$35,819,012.64</u>
Net Producer Location Adjustments							\$5,446,663.96
1/2 Unobligated Balance Producer Settlement Fund							678,000.00
Total - Divided by Total Pounds	1,749,300,146					\$2.397740	\$41,943,676.60
Rate of Cash Reserve						<u>(0.047740)</u>	<u>(835,123.06)</u>
PRODUCER PRICE DIFFERENTIAL at Cuyahoga County, OH ¹						\$2.35 / cwt	\$41,108,553.54

COMPONENT PRICES

COMPUTATION OF UNIFORM PRICE

	<u>July</u>	
	<u>2025</u>	<u>2024</u>
Butterfat Price	\$2.8435 / lb	\$3.5720 / lb
Protein Price	1.8730 / lb	1.9466 / lb
Other Solids Price	0.3092 / lb	0.2571 / lb
Somatic Cell Adjustment Rate	0.00088 / cwt	0.00099 / cwt
Nonfat Solids Price ²	1.0286 / lb	1.0149 / lb

	<u>July</u>	
	<u>2025</u>	<u>2024</u>
Class III Price - 3.5% BF	\$17.32	\$19.79
Producer Price Differential*	<u>2.35</u>	<u>1.42</u>
Statistical Uniform Price	\$19.67	\$21.21

CLASS PRICES

CLASSIFICATION OF PRODUCER MILK

	<u>July</u>	
	<u>2025</u>	<u>2024</u>
Class I*	\$22.62	\$23.11
Class II	19.31	21.82
Class III	17.32	19.79
Class IV	18.89	21.31

	<u>July</u>	
	<u>2025</u>	<u>2024</u>
	<i>Product lbs.</i>	<i>Product lbs.</i>
Class I	555,632,883	568,827,779
Class II	297,283,804	185,114,984
Class III	723,919,842	725,790,856
Class IV	<u>172,346,531</u>	<u>64,890,848</u>
Total	1,749,183,060	1,544,624,467

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 July 2025 was \$2.35 and the Statistical Uniform Price was \$19.67 for the month. The Statistical Uniform Price is \$0.30 higher than last month and is \$1.54 lower than July 2024. The Producer Butterfat Price of \$2.8435 per pound increased \$0.1057 from June and is down \$0.7285 from a year ago. The Protein Price of \$1.8730 is down \$0.6598 from last month and is down \$0.0736 from July 2024. The Other Solids Price in July was \$0.3092 per pound, an increase from last month's price of \$0.2914 and \$0.0521 higher than last July. The Somatic Cell Adjustment rate for July

was \$0.00088 per cwt. July producer receipts of 1.75 billion pounds were 2.4 percent lower than June and 13.2 percent higher than July 2024 production of 1.54 billion pounds. Producer milk allocated to Class I accounted for 31.8 percent of the total producer milk in July 2025, higher than 28.8 percent in June, and lower than 36.8 percent in July 2024. A total of 3,266 producers were pooled on the Mideast Order compared to 3,237 producers pooled in July 2024.

The market average content of producer milk was as follows: Butterfat 4.08%; Protein 3.16%; Other Solids 5.77% and Nonfat Solids 8.93%.

June 2025 Highlights

Total cheese output (excluding cottage cheese) was 1.20 billion pounds, 4.2 percent above June 2024 but 3.9 percent below May 2025.

Italian type cheese production totaled 509 million pounds, 5.0 percent above June 2024 but 2.5 percent below May 2025.

American type cheese production totaled 473 million pounds, 4.8 percent above June 2024 but 7.1 percent below May 2025.

Butter production was 185 million pounds, 10.4 percent above June 2024 but 12.5 percent below May 2025.

Dry milk products (comparisons in percentage with June 2024)
 Nonfat dry milk, human - 140 million pounds, up 9.6 percent.
 Skim milk powder - 53.9 million pounds, down 21.7 percent.

Whey products (comparisons in percentage with June 2024)
 Dry whey, total - 73.6 million pounds, up 0.7 percent.
 Lactose, human and animal - 95.9 million pounds, up 1.9 percent.
 Whey protein concentrate, total - 42.9 million pounds, up 4.8 percent.

Frozen products (comparisons in percentage with June 2024)
 Ice cream, regular (hard) - 64.9 million gallons, down 3.9 percent.
 Ice cream, lowfat (total) - 38.7 million gallons, down 2.1 percent.
 Sherbet (hard) - 1.88 million gallons, up 6.8 percent.
 Frozen yogurt (total) - 3.52 million gallons, down 0.8 percent.

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

June Milk Production Up 3.4 Percent

Milk production in the 24 major States during June totaled 18.5 billion pounds, up 3.4 percent from June 2024. May revised production, at 19.3 billion pounds, was up 2.4 percent from May 2024. The May revision represented an increase of 136 million pounds or 0.7 percent from last month's preliminary production estimate. Production per cow in the 24 major States averaged 2,045 pounds for June, 33 pounds above June 2024. The number of milk cows on farms in the 24 major States was 9.03 million head, 151,000 head more than June 2024, and 3,000 head more than May 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 June totaled 2.70 billion pounds, up 63 million pounds or 2.4 percent from June 2024. Production per cow in the Mideast states averaged 2,019 pounds for June, 24 pounds more than June 2024. The number of cows on farms in the Mideast states was 1.36 million head, 16,000 head more than June 2024.

Released July 22, 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)	June 2025 -----Weighted Averages-----				June 2024 -----Weighted Averages-----				
			Butterfat	Protein	Other Solids	SCC (000)	Pounds of Milk (000)	Butterfat	Protein	Other Solids	SCC (000)
Michigan	693	928,252	4.17	3.20	5.80	168	682,561	4.05	3.16	5.81	171
Ohio	1,141	425,212	4.18	3.21	5.78	194	366,732	3.95	3.10	5.71	200
Indiana	574	283,950	4.11	3.16	5.77	194	231,736	3.99	3.14	5.81	201
Pennsylvania	606	80,480	4.05	3.10	5.69	225	74,337	3.96	3.06	5.67	232
New York	106	50,457	4.38	3.27	5.88	149	44,719	4.19	3.14	5.76	174
Other	149	14,294	4.04	3.13	5.70	238	57,638	4.14	3.19	5.77	171
Total/Average *	3,269	1,782,644	4.16	3.20	5.79	181	1,457,723	4.02	3.14	5.77	186

* 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
July 2025**

<u>Marketing Area</u> ^{1/}	Producer Milk		Class I	Producer <u>Price Differential</u> <i>(per cwt.)</i>	Statistical <u>Uniform Price</u> <i>(per cwt.)</i>
	<u>Total</u> <i>(000)</i>	<u>Class I</u> <i>(000)</i>	<u>Percent</u> %		
FO 1 Northeast - (<i>Boston</i>)	2,355,375	625,277	26.4	\$3.24	\$20.56
FO 5 Appalachian - (<i>Charlotte</i>)	408,740	293,094	71.7	^{2/}	23.24
FO 6 Florida - (<i>Tampa</i>)	190,774	151,331	79.3	^{2/}	24.38
FO 7 Southeast - (<i>Atlanta</i>)	273,448	201,486	73.7	^{2/}	23.68
FO 30 Upper Midwest - (<i>Chicago</i>)	2,290,159	152,393	6.7	0.63	17.95
FO 32 Central - (<i>Kansas City</i>)	1,217,796	321,760	26.4	1.98	19.30
FO 33 Mideast - (<i>Cleveland</i>)	1,749,183	555,633	31.8	2.35	19.67
FO 51 California - (<i>Los Angeles</i>)	1,893,777	368,142	19.4	1.48	18.80
FO 124 Pacific Northwest - (<i>Seattle</i>)	573,334	113,674	19.8	1.59	18.91
FO 126 Southwest - (<i>Dallas</i>)	1,221,279	299,182	24.5	2.08	19.40
FO 131 Arizona - (<i>Phoenix</i>)	302,145	100,393	33.2	^{2/}	19.49

^{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 AUGUST 2025.....\$17.32/cwt.

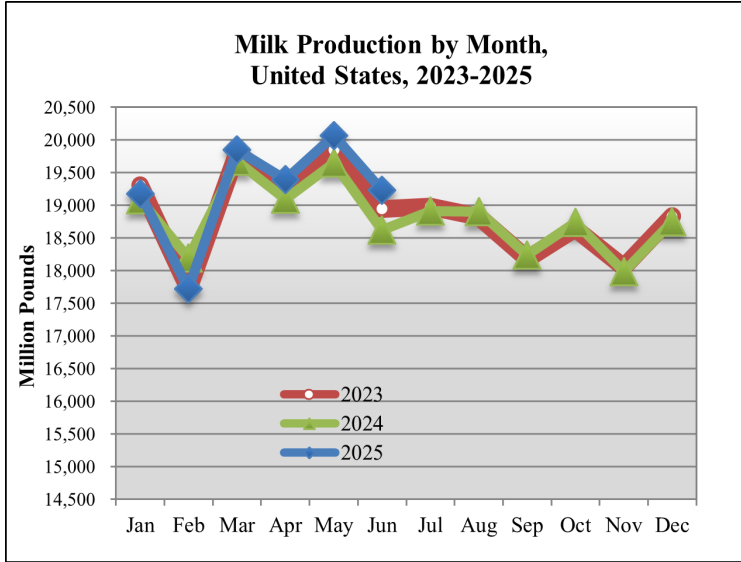


Mideast Market Administrator's Bulletin

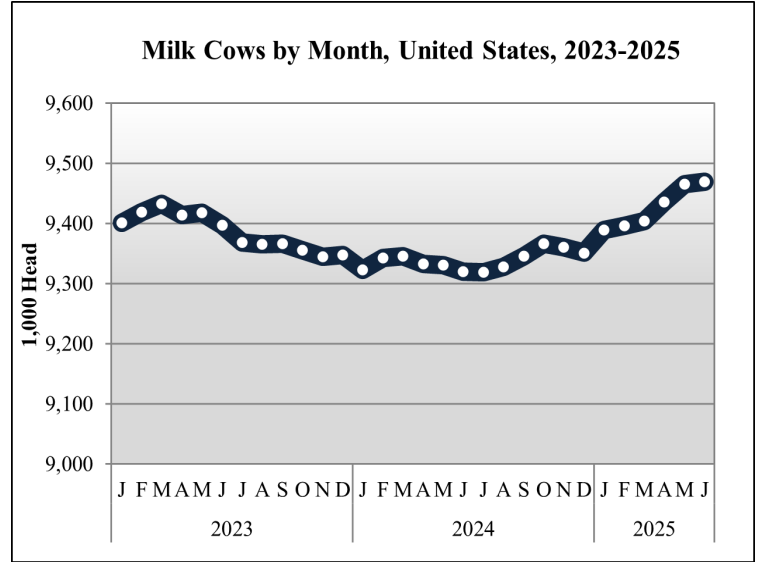
Federal Order No. 33

Supplement
August 2025

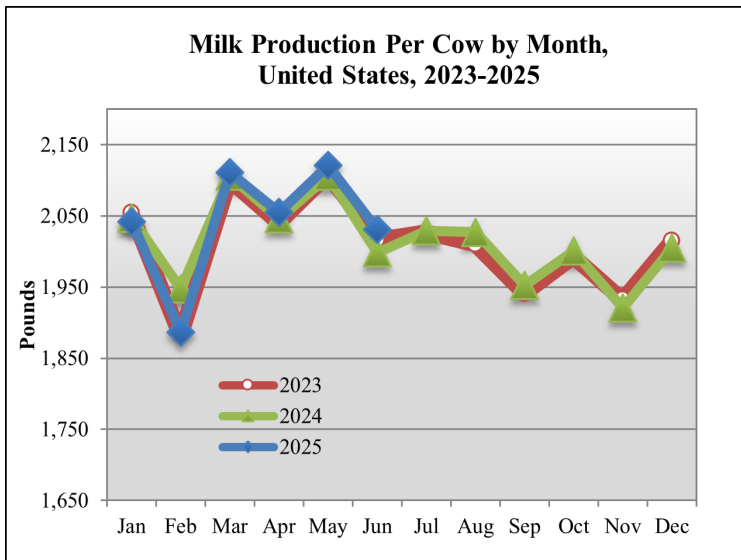
MILK PRODUCTION STATISTICS 1/



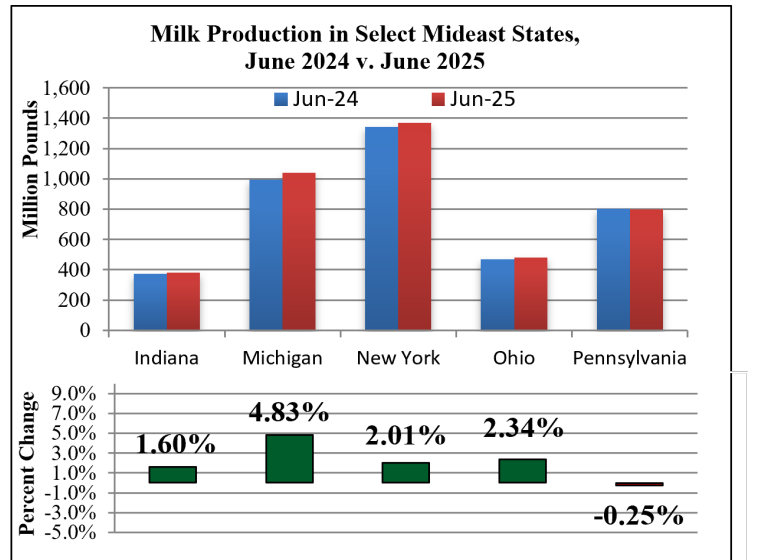
June 2025 milk production in the United States decreased 839 million pounds from May 2025 to 19.23 billion pounds. June 2025 milk production in the United States was up 3.25% percent from the same month of the prior year.



The number of milk cows on farms in the United States was 9.47 million head for June 2025, up 4,000 head from May 2025 and up 146,000 head from June 2024.



Production per cow in the United States averaged 2,031 pounds for June 2025 down 90 pounds from May 2025. June 2025 milk production per cow was up 33 pounds from the same month of the prior year.

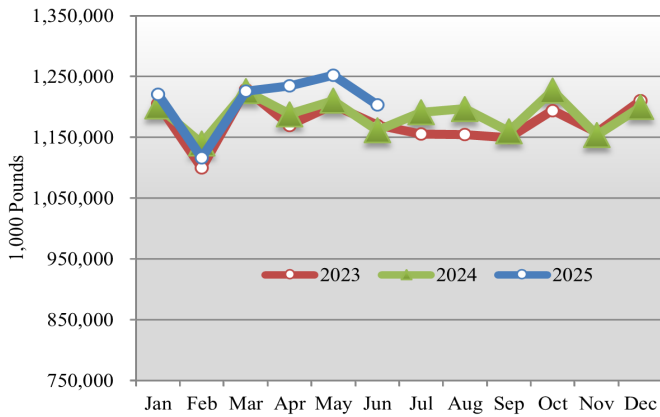


Milk production from selected states which pool on the Mideast marketing area totaled 4.07 billion pounds during June 2025, up 90 million pounds from the prior year.

1/ Source: National Agricultural Statistics Service (NASS), Agriculture Statistics Board, United States Department of Agriculture (USDA).

DAIRY PRODUCT PRODUCTION 1/

Total Cheese Production, 2023-2025



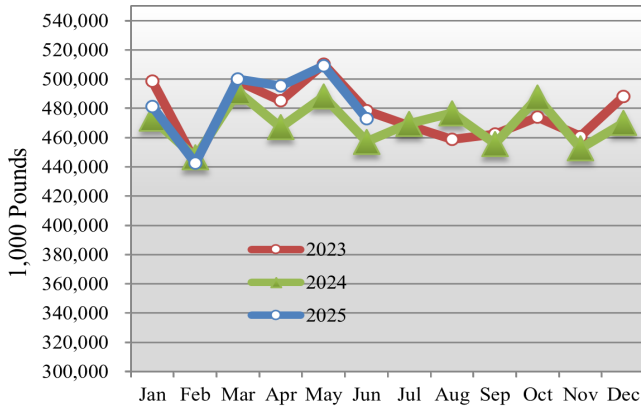
Dairy Product Production Summary:

American type cheese production totaled 473 million pounds, 3.5 percent above June 2024 and 7.1 percent below May 2025.

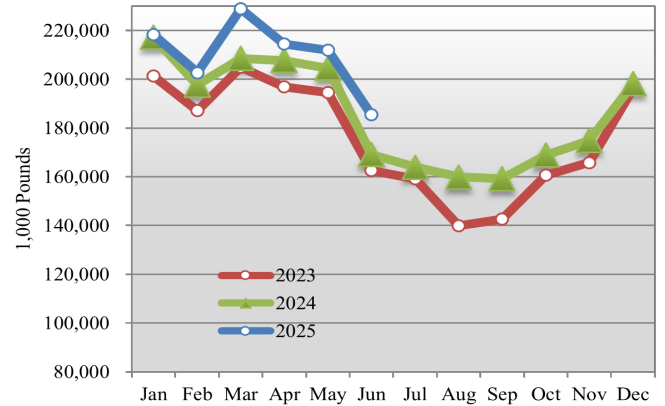
Total cheese output (excluding cottage cheese) was 1.203 billion pounds, 3.6 percent above June 2024 and 3.9 percent below May 2025.

Butter production was 185 million pounds, 9.7 percent above June 2024 and 12.5 percent below May 2025.

Total American Cheese Production, 2023-2025



Total Butter Production, 2023-2025



COMMERCIAL DISAPPEARANCE 2/

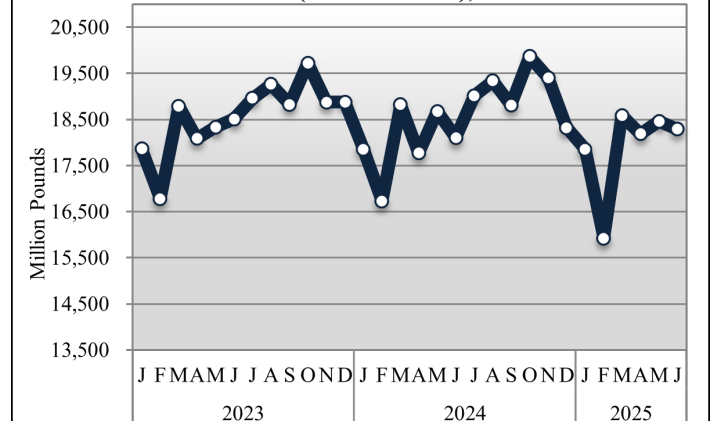
Commercial disappearance of milk in all productions represents the difference between the beginning monthly milk supply and the ending commercial stocks. Milk supply includes farm production, beginning inventory, imports and excludes milk used on the farm.

For June 2025 commercial disappearance of milk was 18.3 billion pounds on a milk-fat basis, up 1.0 percent from the prior year. The cumulative disappearance total for 2025 is 107.3 billion pounds, a decrease of 0.6 percent from the same 6-month period of 2024.

June 2025 commercial disappearance of American cheese was 453 million pounds, down 0.2 percent from the prior year.

June 2025 commercial disappearance of butter was 188 million pounds, up 7.1 percent from the prior year.

Commercial Disappearance of Milk in All Products (milk-fat basis), 2023-2025



1/ Source: National Agricultural Statistics Service (NASS), Agricultural Statistics Board, United States Department of Agriculture (USDA).

2/ Sources: NASS, ERS, FAS, FSA, Bureau of Census, and ERS calculations.