

DAIRY MARKET NEWS AT A GLANCE

CME GROUP CASH MARKETS (8/9)

BUTTER: Grade AA closed at \$2.3150. The weekly average for Grade AA is \$2.3315 (-.0060).

CHEESE: Barrels closed at \$1.7200 and 40# blocks at \$1.8675. The weekly average for barrels is \$1.7080 (+.0030) and blocks, \$1.8660 (+.0450).

NONFAT DRY MILK: Grade A closed at \$1.0275. The weekly average for Grade A is \$1.0240 (-.0055).

DRY WHEY: Extra grade dry whey closed at \$.3550. The weekly average for dry whey is \$.3490 (+.0090).

CHEESE HIGHLIGHTS: Early in the week, spot milk trading/offers were quiet. More reported prices, at higher premiums, began to trickle in midweek. The reported spot milk range was from Class III to \$1.75 over. For some perspective, last year during this week spot prices were \$.50 under to \$1 over, while in 2017 prices ranged from Class to \$1.50 under. More milk loads are headed from the Central region to the East. Upper Midwest milk is reportedly headed into the Mid- and Northeast, while milk handlers in the lower half of the region are shipping milk Southeast. All that said, cheese production is steady to busy throughout the nation. Regarding demand, this summer has treated cheese producers well in the Midwest. Specialty, curds, and barrel cheesemakers all report positive sales numbers. Western cheese reports are a little more sluggish. Contacts there point to EU trade agreements that may deter exports. Inventories are growing in the East/West, but most feel a sense of balance. Generally, cheese markets are steadfast.

BUTTER HIGHLIGHTS: In general, butter production has slowed down across the nation during the current week. Butter makers across the country relay that cream supply is adequate for most butter making needs. However, the Midwest is the exception as cream supplies are scarce, while some manufacturers continue importing cream from the Southwest/Western regions. Meanwhile, in the West region, butter makers have curtailed their churning schedules because, according to them, with the current high butterfat premiums it is more profitable to sell off cream than to make butter. This week, bulk butter pricing varies among the regions: East, 5.0 cents to 8.0 cents over the market; Central, even with the market to 3.0 cents above the market; West, 1.0 cents to 7.5 cents over the market, with various periods and averages used.

FLUID MILK: Milk output off the farms is lower in all areas of the East this week, whereas it is up in the Midwest. In the West, output fluctuates from one state to another. In the Pacific Northwest and the Mountain states of Idaho, Utah, and Colorado, milk yield is strong,

especially in Idaho where it is close to flush volumes. In California, New Mexico, and Arizona milk production is mostly down. Class I interest is steady to increasing as the school year has either started or is about to start in all the regions. There are some movements of milk from the Midwest to the Northeast and Southeast to supplement regional supplies, resulting in lower milk supplies for midwestern cheese makers. Arizona is also receiving some out-of-state milk to complete its processing needs and help with balancing obligations in another state. Condensed skim availability has diminished in the East, leading to higher overages compared to last week. In the West, Class III manufacturers are taking additional loads of condensed skim. Cream stocks are currently steady to tighter. Cream multiples are 1.3800-1.4800 in the East, 1.2800-1.4100 in the Midwest, and 1.1600-1.3200 in the West.

DRY PRODUCTS: Low/medium heat nonfat dry milk prices are up on the top of the range in the Central and East. However, they increased on the bottom of the range in the West while declining on the top. Trading activities are generally light, but picked up a bit midweek in the Central. Low/medium heat nonfat dry milk inventories are available, although condensed skim drying has been reduced in certain areas due to tighter availability. Dry buttermilk markets are stable to strong. Prices are unchanged in the Central and East, but up in the West. Production and stocks are low, impacted by higher cream prices. Dry buttermilk demand is mainly based on contractual needs. National dry whole milk prices are mixed. Inventories are abundant, while the spot demand pattern is the same as last week. The primary goal of production is to fulfill contractual requests. Dry whey prices vary by regions. They are steady in the Central, mixed in the West, and increasing in the Northeast. Offers are readily available, and some warehouses are full. Outputs and sales are flat. As inquiries for whey protein concentrate 34% increase, so are the prices moving higher. Buyers are taking additional loads for Q4 coverage. Supplies are steady to a bit tight, whereas production is stable. Lactose prices are steady on the range, but down on the mostly series. Inventories are manageable and in good equilibrium with demand. However, trade conflict and the African Swine fever in China continue to impact market conditions. While rennet casein prices are mixed, November contracts prices look steadier than September prices. Production is enough for current demand. It is expected that New Zealand casein output will pick up in the coming months.

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DAIRY MARKET NEWS PRICE SUMMARY FOR AUGUST 5 - 9, 2019 PRICES (\$/LB) & CHANGES FROM PREVIOUS PUBLISHED PRICES

Commodity	Range	Mostly	Commodity	Range	Mostly	Commodity	Range	Mostly
NDM			BUTTERMILK			LACTOSE		
Central Low/Med. Heat	1.0000 1.0800	1.0100 1.0500	Central/East	1.0100 1.1000		Central/West	0.1800 0.4500 0.2400 0.3650	
Change	N.C. 0.0200	N.C. N.C.	Change	N.C. N.C.		Change	N.C. N.C. -0.0100 N.C.	
Central High Heat	1.1200 1.2000		West	0.9950 1.0650 1.0100 1.0400		WPC 34%		
Change	N.C. N.C.		Change	N.C. 0.0150 0.0100 N.C.		Central/West	0.8700 1.1000 0.8800 1.0100	
West Low/Med. Heat	0.9725 1.0750	1.0100 1.0500	WHEY			Change	0.0200 0.0125 0.0100 0.0025	
Change	0.0075 -0.0050	N.C. N.C.	Central	0.3000 0.3700 0.3400 0.3600		CASEIN		
West High Heat	1.1500 1.2250		Change	N.C. N.C. N.C. N.C.		Rennet	3.0800 3.4225	
Change	N.C. 0.0100		West	0.2850 0.4200 0.3100 0.3700		Change	0.0075 -0.3575	
DRY WHOLE MILK			Change	-0.0100 0.0300 N.C. N.C.		Acid	3.1850 3.3075	
National	1.6500 1.7800		Northeast	0.3200 0.4000		Change	N.C. 0.0075	
Change	0.0100 -0.0200		Change	N.C. 0.0100		ANIMAL FEED WHEY		
						Central	0.2500 0.2900	
						Change	N.C. N.C.	

DAIRY MARKET NEWS AT A GLANCE

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ORGANIC DAIRY MARKET NEWS: New England Organic Milk Sales and Sourcing. Federal Milk Market Order 1, in New England, reports the utilization of types of organic milk by pool plants. During June 2019, organic whole milk utilization totaled 14.1 million pounds, slightly lower than 14.2 million pounds one year earlier. June's 2019 butterfat content was 3.28 percent, unchanged from the previous year. Organic reduced fat milk utilization for June this year, nearly 15.4 million pounds, dipped from the 18.4 million pounds one year earlier. The butterfat content was 1.38 percent, well above the 1.32 percent last year. Across the United States, organic retail advertisements grew 1 percent compared to the previous survey period. Regionally, increases in ads were reported in parts of the East region, but ads decreased in the Midwest and Southwest regions. Organic milk advertisements in the Southeast saw a large percentage change in ads, up 314 percent, compared to last week.

NATIONAL RETAIL REPORT (DMN): Conventional dairy ad numbers declined 2 percent this week. Organic dairy ad numbers increased 1 percent. There are over ten times more conventional dairy ads than organic dairy ads. The national weighted average advertised price for conventional milk half gallons is \$2.03, compared to \$4.07 for organic milk half gallons, an organic price premium of \$2.04. The weighted average price for conventional 8 oz. block cheese is \$2.14. The weighted average price for organic 8 oz. block cheese is \$3.99, resulting in a \$1.85 organic price premium. Conventional yogurt ad numbers increased 19 percent. Organic yogurt ads increased 26 percent. The weighted average advertised price for conventional yogurt in 4 to 6 oz. containers is \$0.51.

NOTICE: August 7, 2019

The U.S. Department of Agriculture (USDA) today announced plans to purchase Mozzarella, Process and Natural American Cheddar Cheese for the National School Lunch Program and other Federal food nutrition assistance programs. Solicitations will be issued during September 2019 for deliveries beginning January 1, 2020 through December 31, 2020. Offers to sell these products must be received not later than the date specified on the solicitations. Solicitations will be available electronically at <https://www.ams.usda.gov/selling-food/wbscm>.

COMMODITY	MONDAY AUG 5	TUESDAY AUG 6	WEDNESDAY AUG 7	THURSDAY AUG 8	FRIDAY AUG 9	WEEKLY CHANGE	WEEKLY AVERAGE
CHEESE							
BARRELS	\$1.6900 (-0.0025)	\$1.7100 (+0.0200)	\$1.7100 (N.C.)	\$1.7100 (N.C.)	\$1.7200 (+0.0100)	:: (+0.0275)	:: \$1.7080 (+0.0030)
40 POUND BLOCKS	\$1.8600 (+0.0400)	\$1.8675 (+0.0075)	\$1.8675 (N.C.)	\$1.8675 (N.C.)	\$1.8675 (N.C.)	:: (+0.0475)	:: \$1.8660 (+0.0450)
NONFAT DRY MILK							
GRADE A	\$1.0175 (-0.0025)	\$1.0225 (+0.0050)	\$1.0250 (+0.0025)	\$1.0275 (+0.0025)	\$1.0275 (N.C.)	:: (+0.0075)	:: \$1.0240 (-0.0055)
BUTTER							
GRADE AA	\$2.3475 (+0.0275)	\$2.3500 (+0.0025)	\$2.3300 (-0.0200)	\$2.3150 (-0.0150)	\$2.3150 (N.C.)	:: (-0.0050)	:: \$2.3315 (-0.0060)
DRY WHEY							
EXTRA GRADE	\$0.3400 (N.C.)	\$0.3400 (N.C.)	\$0.3550 (+0.0150)	\$0.3550 (N.C.)	\$0.3550 (N.C.)	:: (+0.0150)	:: \$0.3490 (+0.0090)

Prices shown are in U.S. dollars per lb. in carlot quantities. Carlot unit weights: CHEESE, 40,000-44,000 lbs.; NONFAT DRY MILK, 41,000-45,000 lbs.; BUTTER, 40,000-43,000 lbs.; DRY WHEY, 41,000-45,000 lbs. Weekly Change is the sum of Daily Price Changes. Weekly Average is the simple average of the Daily Cash Close prices for the calendar week. Weekly Average Change is the difference between current and previous Weekly Average. Computed by Dairy Market News for informational purposes. This data is available on the Internet at WWW.AMS.USDA.GOV/MARKET-NEWS/DAIRY

NOTICE: Five days of trading information can be found at www.cmegroup.com/trading/agricultural/spot-call-data.html

BUTTER MARKETS

NORTHEAST

Eastern butter plants have reduced their churning schedules this week. There are fewer cream offers on the spot market. Additionally, some manufacturers are not receiving quotes for cream loads at this time. When available and needed, market participants are purchasing spot loads in the mid to high 1.40s. Manufacturers' private label butter orders are stable. Supplies are balanced to lower in the East. Earlier this week, spot market butter trades had increased on various market exchanges. Current bulk butter prices for domestic sales are reported 5-8 cents over the market of the CME Group, with various time frames and averages used.

Prices for: Eastern U.S., All First Sales, F.O.B., Grade AA, Conventional, and Edible Butter

Bulk Basis Pricing - 80% Butterfat \$/LB: +0.0500 - +0.0800

Secondary Sourced Information:

The CME Group July 2019 monthly average price for AA butter, \$2.3897, is up from the June 2019 monthly average of \$2.3884.

WEST

Western butter makers relay that cream is in adequate supply for most butter making needs. A few manufacturers have slowed their churning schedules because it is more advantageous to sell off cream than to make butter. In other avenues of our society, August is part of the silly season, a time of the year for less than spectacular news, and butter markets appear to be in that uneventful mode as well. Industry contacts suggest August sales are starting off slowly. Retail sales are sluggish and bulk butter buyers have taken a break, waiting to see if prices may trend lower. Food service is one of the few market sectors that appears to have life. Inventories are diminishing, but some contacts acknowledge that bulk butter is readily available in the West.

Prices for: Western U.S., All First Sales, F.O.B., Grade AA, Conventional, and Edible Butter

Bulk Basis Pricing - 80% Butterfat \$/LB: +0.0100 - +0.0750

CENTRAL

Midwestern butter makers eschewed the spot cream market this week, at least from cream sources in the region. They can find an occasional spot load from the Southwest/Western regions, but additional freight costs are pushing beyond their reach. Next week, however, some butter manufacturers are looking to add to production schedules and have been busy looking ahead for affordable cream. Bulk butter has been readily available in the region, and the country. Contacts suggest demand is uninspired. Buyers are taking a step back as market prices have declined in recent weeks. Butter contacts have some concerns about upcoming cold storage reports. The NASS Dairy Products report showed a June decrease in production, while June's Cold Storage report showed a four percent monthly increase in stocks. All said, contacts are awaiting the results of July's cold storage numbers and what those results will do to the markets.

Prices for: Central U.S., All First Sales, F.O.B., Grade AA, Conventional, and Edible Butter

Bulk Basis Pricing - 80% Butterfat \$/LB: 0.0000 - +0.0300

Butter Production – States and United States: June 2018 and 2019

Region	Monthly Production (1000 pounds)		Percent Change from	
	June 2018	May 2019	June 2018	May 2019
United States	142,122	160,945	146,461	3.1 -9.0
Atlantic	13,684	17,514	14,853	8.5 -15.2
Pennsylvania	6,619	7,970	6,895	4.2 -13.5
Central	57,388	62,151	57,206	-0.3 -8.0
West	71,050	81,280	74,402	4.7 -8.5
California	44,460	51,789	45,940	3.3 -11.3

Butter Production – Cumulative Production January - June

Report Month	Cumulative Production (1000 pounds)		Percent Change from
	2018	2019	2018
June	1,019,119	999,805	-1.9

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2019 U.S. Butter and Milkfat Exports (USDA-FAS)

	2019 Exports (Million Lb.)	% Change From 1 Year Ago
June	5.1	- 40
TOTAL, JAN - JUNE	30.6	- 35
Exports – Destination Country		
1 Canada	9.4	- 41
2 Mexico	5.2	- 55
3 Saudi Arabia	3.0	+13
4 Columbia	2.8	+776
5 South Korea	2.7	+115

2019 U.S. Butter and Milkfat Imports (USDA-FAS)

(Imports for Consumption)

	2019 Imports (Million Lb.)	% Change From 1 Year Ago
June Imports		
Total Butter, Fats, Milk (H.S. Code 0405)	13.9	+ 41
Butter		
Quota (H.S. Code 405101000)	1.6	+ 17
Over Quota (H.S. Code 405102000)	6.1	+ 9
AMF		
Quota (H.S. Code 405901020)	1.8	+3112
Over Quota (H.S. Code 405902020)	2.5	+ 26
Other Milk Fat	1.9	+ 138
	2019 Imports (Million Lb.)	% Change From 1 Year Ago
TOTAL, JAN - JUNE	62.3	+ 30
Imports – Country of Origin		
1 Ireland	31.3	+ 35
2 Mexico	12.3	+ 9
3 Australia	4.5	+1622
4 India	3.6	- 31
5 New Zealand	3.0	+ 7

CHEESE MARKETS

NORTHEAST

Cheese production is stable in the Northeast. Cheddar, mozzarella and provolone supplies are growing in the region at a steady rate. Cheddar barrel and block spot prices are a bit higher on various market exchanges. There are mixed reports on current market conditions. Some market participants relay the tone is somewhat weaker as export demand from a few countries is lower. However, domestic demand is fairly stable, and several food sectors' orders are expected to pick up in the near future. In the Northeast, the wholesale cheese prices for cheddar and Muenster are unchanged this week. The process cheese prices decreased by \$0.0125. The Grade A Swiss price increased \$0.0475 following the release of the July 2019 Announcement of Class and Component Prices. The Class III skim milk price for July 2019 saw a \$1.23 increase. The DMN Northeast July 2019 monthly average price for cheddar blocks is \$2.4213, compared to \$2.3506 one month ago. Processed 5# sliced average price is \$2.1394, compared to \$1.9675 one month ago.

Secondary Sourced Information:

This week's Global Dairy Trading (GDT) Event 241 released negative price changes for cheddar cheese, at -2.0 percent for all contracts.

The CME Group July 2019 monthly average price for barrels was \$1.7343, compared to \$1.6258 a month ago; blocks' average price was \$1.8180, up from \$1.7906 a month ago.

**WHOLESALE SELLING PRICES: DELIVERED
DOLLARS PER POUND(MIXED LOTS (1000-5000 POUNDS))**

Cheddar 40 pound Block	2.2775-2.5625
Muenster	2.2625-2.6125
Process American 5 pound Sliced	1.8625-2.3425
Swiss 10-14 pound Cuts	3.2775-3.6000

MIDWEST

Spot milk offers are few and far between for Midwestern cheesemakers. Some contacts relay milk loads are headed East. Spot milk loads ranged from Class to \$1.25 over Class III. Cheesemakers are limiting production rates, as most are running on either a five- or six-day workweek. Cheese order reports are seasonally stable. Some specialty cheesemakers suggest summer demand has been stronger than average. Curd and barrel producers suggest demand has been noticeably stronger both this and last summer. Cheese market tones are fair. Although there is a fairly large price gap, contacts feel the prices are strong enough to appease cheesemakers of concern. Midwestern wholesale prices are up \$.0475 for Swiss cuts, down \$.0125 for process and unchanged for all other types.

**WISCONSIN WHOLESALE SELLING PRICES: DELIVERED
DOLLARS PER POUND(MIXED LOTS (1000-5000 POUNDS))**

Blue 5 pounds	2.4575-3.5275
Brick 5 pounds	2.1900-2.6150
Cheddar 40 pound Block	1.9125-2.3125
Monterey Jack 10 pounds	2.1650-2.3700
Mozzarella 5-6 pounds	1.9900-2.9350
Muenster 5 pounds	2.1900-2.6150
Process American 5 pound Loaf	1.7925-2.1525
Swiss 6-9 pound Cuts	2.7925-2.9100

WEST

Milk volumes in the West are making possible the ongoing production of cheese. While sales of cheese are generally active, they are not very strong. Some manufacturers are heavily promoting their

cheese locally, hoping that it will help increase their sales. Recent trade agreements between the EU and other global cheese markets are a cause of concern for U.S. cheese producers as their international market shares might be affected in the long run. There have been some reports of increased cheese availability in the West; nonetheless, inventories have remained under control. The market undertone is steady compared to the previous week. Wholesale prices declined \$.0125 for process, but stayed the same for cheddar block, cuts and Monterey Jack. Swiss cut wholesale prices are up \$.0475 from the prior week.

**WHOLESALE SELLING PRICES: DELIVERED
DOLLARS PER POUND(MIXED LOTS (1000-5000 POUNDS))**

Cheddar 10 pound Cuts	2.1500-2.3500
Cheddar 40 pound Block	1.9025-2.3925
Monterey Jack 10 pounds	2.1375-2.4125
Process American 5 pound Loaf	1.8100-2.0650
Swiss 6-9 pound Cuts	2.8750-3.3050

FOREIGN TYPE

The market for German sliced cheese is defined as still balanced. Supply and demand remain in good equilibrium. However, there is a bit of weakening in domestic sales due to the summer holidays at some localities. Buying interest from Southern Europe is on the rise. Exports of cheese to other countries are at normal seasonal levels. Cheese production is limited by steady to declining milk output in Germany. Inventories are low, but enough to fill planned needs. Cheese prices in Germany are mostly stable. Nonetheless, the expectation is a minimal surge in prices throughout this month as shown in current ongoing sale negotiations. Within the USA, all prices are unchanged from last week, except for Swiss cheese prices that increased \$.0475 on both ends of the range.

**WHOLESALE SELLING PRICES: FOB DISTRIBUTORS DOCK
DOLLARS PER POUND (1000 - 5000 POUNDS, MIXED LOTS)**

	:	NEW YORK	:	
VARIETY	:	IMPORTED	:	DOMESTIC
	:		:	
Blue	:	2.6400-5.2300	:	2.3350-3.8225
Gorgonzola	:	3.6900-5.7400	:	2.8425-3.5600
Parmesan	:	-0-	:	3.7225-5.8125
Romano	:	-0-	:	3.5250-5.6800
Sardo Romano (Argentina)	:	2.8500-4.7800	:	-0-
Reggianito (Argentina)	:	3.2900-4.7800	:	-0-
Jarlsberg	:	2.9500-6.4500	:	-0-
Swiss	:	-0-	:	3.3150-3.6375*
Swiss (Finland)	:	2.6700-2.9300	:	-0-

* = Price change.

COLD STORAGE

**WEEKLY COLD STORAGE HOLDINGS - SELECTED STORAGE CENTERS
IN THOUSAND POUNDS - INCLUDING GOVERNMENT STOCKS**

	:	<u>BUTTER</u>	:	<u>CHEESE</u>
08/05/2019	:	40942	:	84019
08/01/2019	:	41296	:	84497
CHANGE	:	-354	:	-478
% CHANGE	:	-1	:	-1

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CHEESE MARKETS

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Dairy Products Report – Cheese Summary

Released August 1, 2019, by the National Agricultural Statistics Service (NASS), Agricultural Statistics Board, United States Department of Agriculture (USDA).

Cheese Production – United States: June 2018 and 2019

Total Cheese ¹ Region	Monthly Production (1000 pounds)			Percent Change from	
	June 2018	May 2019	June 2019	June 2018	May 2019
United States	1,065,989	1,109,044	1,072,752	0.6	-3.3
Atlantic	129,191	132,404	128,609	-0.5	-2.9
Central	493,613	509,123	493,513	-	-3.1
West	443,185	467,517	450,630	1.7	-3.6

American Region	Monthly Production (1000 pounds)			Percent Change from	
	June 2018	May 2019	June 2019	June 2018	May 2019
United States				-0.6	-3.9
Atlantic	27,237	28,628	28,140	3.3	-1.7
Central	217,989	220,025	212,260	-2.6	-3.5
West	183,850	195,290	186,141	1.2	-4.7

Italian Cheese Region	Monthly Production (1000 pounds)			Percent Change from	
	June 2018	May 2019	June 2019	June 2018	May 2019
United States	450,929	475,351	468,951	4.0	-1.3
Atlantic	57,239	58,400	57,607	0.6	-1.4
Central	183,919	193,650	189,994	3.3	-1.9
West	209,771	223,301	221,350	5.5	-0.9

Cheese Production – Cumulative Production January - June

Cheese Type	Cumulative Production (1000 pounds)		Percent Change from
	2018	2019	2018
Total cheese ¹	6,428,902	6,478,436	0.8
American Cheese ²	2,613,829	2,572,644	-1.6
Italian Cheese	2,757,622	2,837,304	2.9

1/ Excludes cottage cheese.

2/ Includes cheddar, colby, washed curd, stirred curd, Monterey and jack.

**2019 U.S. Cheese and Curd Imports (USDA-FAS)
(Imports for Consumption)**

June Imports	2019 Imports (Million Lb.)	% Change From 1 Year Ago
TOTAL Cheese and Curd (H.S. Code 0406)	29.3	...
Cheese, Except Fresh (H.S. Code 040690)	25.5	+ 3
Fresh Cheese (H.S. Code 040610)	2.0	- 9
Cheese, Processed (H.S. Code 040630)	1.0	- 17
Cheese, Blue-Veined (H.S. Code 040640)	0.6	- 16

TOTAL, JAN - JUNE	2019 Imports (Million Lb.)	% Change From 1 Year Ago
Imports - Country of Origin	178.2	...
1 Italy	40.1	+ 19
2 France	22.1	+ 1
3 Netherlands	13.4	+ 5
4 Spain	11.6	- 7
5 Switzerland	8.8	- 3

2019 U.S. Cheese and Curd Exports (USDA-FAS)

June	2019 Exports (Million Lb.)	% Change From 1 Year Ago
TOTAL, JAN - JUNE	425.9	+ 4
Exports – Destination Country		
1 Mexico	101.4	- 15
2 South Korea	86.1	+26
3 Japan	49.4	+18
4 Australia	24.0	- 10
5 Chile	12.1	- 2

EAST

Northeast milk output is lower off the farms in the region this week. Class I orders are fairly level. Balancing operations are not at capacity. Spot milk continues to be tight. Milk production in the **Mid-Atlantic** is down. Class I milk sales are up. **Southeast** milk is still dropping. Educational institutions are back in session for the school year. Class I orders are up. **Florida** milk production is lower, but levels are not at the bottom quite yet. The temperatures are hot, and cows are uncomfortable. Class I sales are higher. Milk is clearing into the state from other regions. There are fewer **cream** offers on the spot market. Buyers are paying higher prices this week for spot loads. Multiples range 1.38-1.48. With the higher cream prices, some butter makers have reduced churn schedules. **Condensed skim** supplies have tightened. Manufacturers report many buyers are paying higher overages on various market exchanges. The DMN July average for Northeast Class II cream was \$3.2332, compared to \$3.1605 a month ago. The DMN July monthly average for Northeast Class II condensed skim was \$0.7841, compared to \$0.7750 a month ago.

Northeastern U.S., F.O.B. Condensed Skim
 Price Range - Class II; \$/LB Solids: 0.75 - 0.85
 Price Range - Class III; \$/LB Solids: 0.68 - 0.80

Northeastern U.S., F.O.B. Cream
 Multiples Range - All Classes: 1.3800 - 1.4800
 Price Range - Class II; \$/LB Butterfat: 3.2258 - 3.4595

MIDWEST

Milk output is on the rise with cooler temperatures in the Midwest. However, components remain lower and more milk is reportedly moving to both the Northeast and Southeast regions. Therefore, local spot milk markets were quieter this week. Although bottling upticks are expected soon, they have yet to gain much traction. As a result of more milk leaving the region, cheesemakers are not getting a lot of spot offers, as this week's spot range was Class to \$1.75 over, as some higher prices were reported mid-week. **Cream** supply/demand remains steady. Upper Midwestern prices remained nearly the same, with a slight increase on the top of the range. Ice cream production, depending on the variety, is either past or near its peak, but contacts expect higher demand from ice cream manufacturers will remain only for another week or two. Feed shortage reports are increasing for small to middle sized dairy farms in the upper Midwest. That said, heat and humidity have been positive for corn growth in the region. Reports showed a positive week to week gain on corn conditions throughout the Midwest. The DMN monthly average of the range price series for Upper Midwest Class II cream during July 2019 was \$3.2017, compared to \$3.0921 in June.

Price Range - Class III Milk; \$/CWT; Spot Basis: + 0.00 - + 1.75
 Trade Activity: Slow

Midwestern U.S., F.O.B. Cream
 Multiples Range - All Classes: 1.2800 - 1.4100
 Price Range - Class II; \$/LB Butterfat: 3.1790 - 3.2959
 Multiples Range - Class II: 1.3600 - 1.4100

WEST

In **California**, milk supplies are at low points. Production is steady to declining, but processing continues to take place as planned. Milk components are seasonally down. Bottled milk demand has starting to increase in preparation for the new school year. **Arizona** milk volumes off the dairy farms are declining more than usual for this time of the year. The humidity caused by the monsoon is partly the reason for the declines. More milk is going to schools' accounts, keeping handlers busy. Out-of-state milk is also flowing into **Arizona** as processors manage to get the additional milk needed for their day-to-day activities, while at the same time helping another state meet their balancing needs. Milk supply in **New Mexico** is down from a week ago. There was a slight uptick on balancing needs at the beginning of the week, but it has subsided. Class I and III demands are up, whereas Class II milk is moving steadily to processing facilities. Class IV manufacturing has slowed down a bit. Overall, the market tone is steady. Strong milk production continues in the **Pacific Northwest**. Although intakes have eased back slightly, there is plenty of milk available for most processing needs. Bottling demand is steady. Aside from some scheduled and unscheduled maintenance, many manufacturers are running near full schedules. **Idaho, Utah** and **Colorado** milk production continues near peak levels. While milk production has eased back in the southern parts of the region, Idaho milk outputs are still near flush levels. Manufacturers are mostly full and are unable to take on much, if any, additional milk. Any disruption to the milk flow quickly causes gluts in the pipeline. Discounts of \$4 to \$5 under Class are common for backed up milk to get it to move. Industry contacts do not think there has been any milk dumped recently. Schools within the region start sessions in the next two weeks, and contacts expect bottling to relieve some of the pressure on the milk supply. Cheese processors' intakes of **condensed skim** have augmented in some parts of the West, but loads are still available for nonfat dry milk production. There remain heavy pulls of **cream** going to the making of ice cream. Some plants have either decreased their butter output or refrained from producing it altogether. Cream multiples for all Classes have moved up by .01 on both ends of the range.

Multiples Range - All Classes: 1.1600 - 1.3200

CONTINUED FROM PAGE 4

Dairy Products Report - Ice Cream, Regular, Hard

Released August 1, 2019, by the National Agricultural Statistics Service (NASS), Agricultural Statistics Board, United States Department of Agriculture (USDA).

Ice Cream, Regular (Hard) Production – States and United States: June 2018 and 2019

Region	<u>Monthly Production (1000 lbs)</u>			<u>Percent Change from</u>	
	June 2018	May 2019	June 2019	June 2018	May 2019
United States	70,263	64,194	65,495	-6.8	2.0
Atlantic	14,795	13,833	13,701	-7.4	-1.0
Pennsylvania	3,530	3,361	3,412	-3.3	1.5
Central	42,174	37,083	40,561	-3.8	9.4
Missouri	3,889	3,219	3,335	-14.2	3.6
Ohio	2,578	2,636	2,443	-5.2	-7.3
West	13,294	13,278	11,233	-15.5	-15.4
California	6,785	7,269	5,800	-14.5	-20.2
Oregon	1,377	1,500	1,261	-8.4	-15.9
Utah	3,033	2,222	2,047	-32.5	-7.9

Ice Cream, Regular (Hard) – Cumulative Production January - June

Report Month	<u>Cumulative Production</u>		<u>Percent Change</u>
	(1000 lbs)		from
	2018	2019	2018
June	370,319	364,900	-1.5

NONFAT DRY MILK, BUTTERMILK & WHOLE MILK

Prices represent carlot/trucklot quantities for domestic and export sales packaged in 25 kg. or 50 lb. bags, or totes, spray process, dollars per pound.

NONFAT DRY MILK - CENTRAL AND EAST

CENTRAL: Low/medium heat nonfat dry milk (NDM) prices rose on the top of the range, while they remained steady elsewhere. Trading was noticeably quieter in the region early in the week, but picked up a little midweek. Overall, trading was quieter week over week in the Midwest. Drying is a little lighter as condensed skim is harder to find in recent weeks. Even still, inventories are available for buyers' needs. Although prices shifted upward, some contacts suggest markets are sluggish at best.

EAST: Prices of low/medium heat nonfat dry milk (NDM) moved higher on the top of the range. Eastern traders suggest the hot temperatures have caught up to condensed skim/NDM markets and supplies are tighter. Fewer plant managers reported being at capacity this week. Interestingly, some contacts are not buying into a potentially bullish market. They say offers are still out there, and there are supplies to be had from outside the region. The DMN monthly average of the mostly price series for Central and East low/medium heat NDM during July was \$1.0361, compared to \$1.0497 in June.

Prices for: Eastern and Central U.S., All First Sales, F.O.B., Extra Grade & Grade A, Conventional, and Edible Nonfat Dry Milk

Price Range - Low & Medium Heat; \$/LB: 1.0000 - 1.0800

Mostly Range - Low & Medium Heat; \$/LB: 1.0100 - 1.0500

Prices for: Eastern and Central U.S., All First Sales, F.O.B., Extra Grade & Grade A, Conventional, and Edible Nonfat Dry Milk

Price Range - High Heat; \$/LB: 1.1200 - 1.2000

NONFAT DRY MILK - WEST

F.O.B. spot prices for western low/medium heat nonfat dry milk are mixed on the range as the bottom of the range increased \$.0075 while the top of the range decreased \$.0050. The market undertone is stable. Domestic and international sales are a bit quiet. Most customers are careful about unscheduled purchases, but continue to take contractual loads. Low/medium heat nonfat dry milk output is following the same pattern as last week. Stocks are plentiful, but not overbearing. High heat nonfat dry milk spot prices moved higher on the top of the range this week. Inventories are very limited due to need based production trends. The majority of customers are buying on contracts, but a few loads are moving through the spot market whenever possible. The July 2019 Dairy Market News monthly average for the West low/medium heat nonfat dry milk mostly series is \$1.0361 compared to \$0.7761 a year ago. The average for Western high heat nonfat dry milk is \$1.1845 compared to \$0.9660 a year ago.

Prices for: Western U.S., All First Sales, F.O.B., Extra Grade & Grade A, Conventional, and Edible Nonfat Dry Milk

Price Range - Low & Medium Heat; \$/LB: 0.9725 - 1.0750

Mostly Range - Low & Medium Heat; \$/LB: 1.0100 - 1.0500

Prices for: Western U.S., All First Sales, F.O.B., Extra Grade & Grade A, Conventional, and Edible Nonfat Dry Milk

Price Range - High Heat; \$/LB: 1.1500 - 1.2250

U.S. NDM Exports, H.S. Code 040210000(FAS)

	2019 Exports (Million Lb.)	% Change From 1 Year Ago
JUNE Total	94.3	-25
TOTAL, JAN-JUNE	722.6	-15
1 Mexico	357.0	- 4
2 Philippines	80.9	-10
3 Indonesia	64.5	- 5
4 Vietnam	61.8	+ 8
5 Malaysia	17.5	-52

Dairy Products Report – Nonfat Dry Milk, Human Summary
Released August 1, 2019, by the National Agricultural Statistics Service (NASS), Agricultural Statistics Board, United States Department of Agriculture (USDA).

Nonfat Dry Milk, Human Production – States & United States: June 2018 and 2019

Region	Monthly Production (1000 pounds)			Percent Change from	
	June 2018	May 2019	June 2019	June 2018	May 2019
United States	152,244	170,687	155,609	2.2	-8.8
Atlantic	34,301	38,474	36,262	5.7	-5.7
Pennsylvania	17,318	17,518	16,344	-5.6	-6.7
Central	34,477	29,282	30,436	-11.7	3.9
West	83,466	102,931	88,911	6.5	-13.6
California	43,010	65,716	43,923	2.1	-33.2
Other States 1/	91,916	87,453	95,342	3.7	9.0

1/ States not shown when fewer than 3 plants reported or individual plant operations could be disclosed.

Nonfat Dry Milk, Human Production – Cumulative Production Jan - June

Report Month	Cumulative Production (1000 pounds)		Percent Change from
	2018	2019	2018
June	981,699	981,785	-

Manufacturers' stocks end-of-month 3/

Product	End of month stocks (1000 pounds)		Percent Change from	
	June 2018	May 2019	June 2019	June 2018
Nonfat Dry Milk, Human	303,301	284,111	288,673	-4.8

3/ Stocks held by manufacturers at all points and in transit.

Manufacturers' shipments 4/

Product	June 2018	May 2019	June 2019	June 2018	May 2019
	Nonfat dry milk, human	108,166	156,324	136,550	26.2

4/ For dry products, shipments of bulk goods.

-CONTINUED ON PAGE 5A-

NONFAT DRY MILK, BUTTERMILK & WHOLE MILK

Prices represent carlot/trucklot quantities for domestic and export sales packaged in 25 kg. or 50 lb. bags, or totes, spray process, dollars per pound.

-CONTINUED FROM PAGE 5-

DRY BUTTERMILK - CENTRAL AND EAST

CENTRAL: Although buttermilk prices are steady, Central region reports all point to a tighter market. Prices within the region are toward the upper half of the range. Producers say buyer interests are present, but availability is limited. They also suggest buyers are in the market for less-than-load amounts. Drying is light, as butter churning is seasonally quiet due to higher seasonal cream prices. Dry buttermilk markets are steady to bullish on steady demand versus light supplies.

EAST: Spot prices remain unchanged on buttermilk powders in the Eastern region. Spot interest remains a little slower in the East, but suppliers are reporting supplies are tight to balanced regardless of interests. As is normally the case, production is based on contract buying. Market conditions are quiet to steady. Market movements are expected to shift as baking season picks up in the early fall. The DMN monthly average of the range price series for Central and East dry buttermilk during July was \$1.0570, compared to \$1.0559 in June.

Prices for: Eastern and Central U.S., All First Sales, F.O.B., Conventional, and Edible Buttermilk
Price Range ; \$/LB: 1.0100 - 1.1000

DRY BUTTERMILK - WEST

Dry buttermilk f.o.b. prices increased \$.0150 on the top of the range, while the mostly series range saw an uptick of \$.0100 on its bottommost end. Less condensed buttermilk is finding its way to the dryers as its usage in ice cream manufacturing has increased. Drying time also remains limited for condensed buttermilk, keeping dry buttermilk output from increasing. Nonetheless, contractual buyers can easily fill their requests for dry buttermilk as their needs are prioritized at the expense of spot buyers. The tonality of the market is steady. The July 2019 Dairy Market News monthly average for the West dry buttermilk mostly series is \$1.0327 compared to \$0.7483 a year ago.

Prices for: Western U.S., All First Sales, F.O.B., Conventional, and Edible Buttermilk
Price Range ; \$/LB: 0.9950 - 1.0650
Mostly Range - ; \$/LB: 1.0100 - 1.0400

Dairy Products Report – Dry Buttermilk Summary

Released August 1, 2019, by the National Agricultural Statistics Service (NASS), Agricultural Statistics Board, United States Department of Agriculture (USDA).

Dry Buttermilk – United States: June 2018 and 2019

Region	<u>Monthly Production (1000 pounds)</u>			<u>Percent Change from</u>	
	June 2018	May 2019	June 2019	June 2018	May 2019
United States	7,603	9,861	8,569	12.7	-13.1

Manufacturers' stocks end-of-month 3/

Product	<u>End of month stocks (1000)</u>			<u>Percent Change</u>	
	June 2018	May 2019	June 2019	June 2018	May 2019
Dry buttermilk, total	14,946	15,172	13,432	-10.1	-11.5

3/ Stocks held by manufacturers at all points and in transit.

DRY WHOLE MILK - U.S.

The dry whole milk price range contracted this week. Although the bottom of the price range increased by a penny, contacts suggest offers are out there and some are noticeably lower than the current low end of the range. This would indicate plentiful inventories, at least in certain areas of the country. Top end prices saw their second consecutive slip, down two cents week over week. Spot demand is seasonally steady, but contractual obligations continue to be the primary focus for production. Market conditions are mixed. As domestic prices have taken a recent hit, GDT results on near-term contracts are in the positive. The DMN monthly average price for dry whole milk was \$1.7357 in July, compared to \$1.6788 in June.

Prices for: U.S., All First Sales, F.O.B., Conventional, and Edible Dry Whole Milk
Price Range - 26% Butterfat; \$/LB: 1.6500 - 1.7800

WHEY, WPC 34%, LACTOSE & CASEIN

Prices represent carlot/trucklot quantities for domestic and export sales packaged in 25 kg. or 50 lb. bags, or totes, spray process, dollars per pound.

DRY WHEY- CENTRAL

Dry whey prices remain unchanged this week on fairly slow trading. Prices are falling within the range, but buyers say offers were frequent this week. Those offers ranged from the low end of the range to above the top end. Even with lighter milk supplies, cheese making and whey production has remained somewhat steady. Cheesemakers reported production workweeks are seasonally steady, between five to six days. Buyers have suggested warehouses are full. They also reported an increase in offers of high protein blends, namely WPC 80%. They say prices on higher protein blends have taken a hit recently. Animal feed whey trades are taking place at similar prices to previous weeks. More are being reported at the lower end of the range. Generally, dry whey market tones remain steady. The DMN monthly average of the mostly price series for Central dry whey during July was \$0.3513, compared to \$0.3547 in June. The monthly average of the range price series for Central animal feed whey during June was \$0.2657, compared to \$0.2725 in June.

Prices for: Central U.S., All First Sales, F.O.B., Extra Grade & Grade A, Conventional, and Edible Dry Whey
Price Range - Animal Feed; \$/LB: .2500 - .2900

Prices for: Central U.S., All First Sales, F.O.B., Extra Grade & Grade A, Conventional, and Edible Dry Whey
Price Range - Non-Hygroscopic; \$/LB: .3000 - .3700
Mostly Range - Non-Hygroscopic; \$/LB: .3400 - .3600

DRY WHEY- NORTHEAST

An increase of \$.0100 occurred at the top of the eastern dry whey price range, bringing the range back to that of two weeks ago. The market is in similar conditions to the past week. As the current trade disagreement with China persists and the African swine fever spreads across several Asian countries, U.S. international sales are unlikely to see any major change soon. In the domestic market, spot trading activities are steady. Dry whey supplies are available to all buyers. Production trends are stable. The July 2019 Dairy Market News monthly average for Northeast dry whey was \$0.3593 compared to \$0.3687 one year ago.

Prices for: Eastern U.S., All First Sales, F.O.B., Extra Grade & Grade A, Conventional, and Edible Dry Whey
Price Range - Non-Hygroscopic; \$/LB: .3200 - .4000

DRY WHEY- WEST

Western f.o.b. spot dry whey prices have declined on the bottom of the range, but increased on the top. The mostly series range is the same as last week. The market undertone continues to be weak. However, demand for brand specific dry whey is more active. Regular dry whey requests both in the domestic and international markets have remained quiet for several weeks, whereas production is flat. Dry whey inventories are slowly increasing, but manufacturers are not having any issue with its handling. The DMN monthly average of the mostly price series for West dry whey during July was \$0.3436 compared to \$0.3550 one month ago and \$0.3552 a year ago.

Prices for: Western U.S., All First Sales, F.O.B., Extra Grade & Grade A, Conventional, and Edible Dry Whey
Price Range - Non-Hygroscopic; \$/LB: .2850 - .4200
Mostly Range - Non-Hygroscopic; \$/LB: .3100 - .3700

Dairy Products Report – Whey Summary

Released August 1, 2019, by the National Agricultural Statistics Service (NASS), Agricultural Statistics Board, United States Department of Agriculture (USDA).

Dry Whey (Human) Production – States and United States

State	Monthly Production (1000 pounds)		Percent Change from		
	June 2018	May 2019	June 2019	June 2018	May 2019
United	84,941	78,211	79,916	-5.9	2.2
Atlantic	22,229	22,139	22,552	1.5	1.9
Central	38,270	35,289	35,742	-6.6	1.3
Wisconsin	27,437	24,956	24,243	-11.6	-2.9
West	24,442	20,783	21,622	-11.5	4.0

Dry Whey – Cumulative Production January - June

Dry Whey	Cumulative Production (1000 pounds)		Percent Change from
	2018	2019	2018
Total ¹	529,606	468,114	-11.6
Human ²	520,726	460,391	-11.6

1. Excludes all modified dry whey products.

2. Values are calculated from Dairy Products report

Manufacturers' stocks end of month ³

Dry Whey	End of month stocks (1000 pounds)			Percent Change from	
	June 2018	May 2019	June 2019	June 2018	May 2019
Human	66,845	64,323	66,889	0.1	4.0
Animal	1,900	1,269	1,213	-36.2	-4.4
Total	68,745	65,592	68,102	-0.9	3.8

3. Stocks held by manufacturers at all points and in transit.

U.S. Dry Whey Exports. H.S. Code 0404104000(FAS)

	2019 Exports (Million Lb.)	% Change From 1 Year Ago
JUNE Total	27.4	- 39
TOTAL, JAN-JUNE	180.8	- 33
1 China	41.7	- 60
2 Philippines	20.0	+ 1
3 Mexico	18.5	+ 11
4 Vietnam	13.3	- 8
5 Canada	11.0	- 19

-CONTINUED ON PAGE 6A-

WHEY, WPC 34%, LACTOSE & CASEIN

Prices represent carlot/trucklot quantities for domestic and export sales packaged in 25 kg. or 50 lb. bags, or totes, spray process, dollars per pound.

-CONTINUED FROM PAGE 6-

WHEY PROTEIN CONCENTRATE

Prices for whey protein concentrate 34% moved higher across the range and mostly price series. Manufacturers report more buyer inquiries. End users are planning for Q4 needs and appear willing to take a few extra loads to assure coverage. Shipments are moving well through contracts and spot sales. Inventories are available, but stocks become tighter for preferred brands. Production is steady. While the market tone for WPC34% seems stable, industry contacts note markets for higher whey protein concentrations are weakening. Market participants have concerns that the WPI and WPC80% weakness may eventually creep into the WPC34% market. DAIRY MARKET NEWS Monthly Averages The July 2019 Dairy Market News average of the mostly price series for Central and West whey protein concentrate 34% was \$0.9297, compared to \$0.9244 in June and \$.8092 one year ago.

Prices for: Central and Western U.S., All First Sales, F.O.B., Extra Grade, Conventional, and Edible Whey Protein Concentrate
Price Range - 34% Protein; \$/LB: .8700 - 1.1000
Mostly Range - 34% Protein; \$/LB: .8800 - 1.0100

U.S. WPC < 80% Exports, H.S. Code 0404100500(FAS)

	2019 Exports (Million Lb.)	% Change From 1 Year Ago
JUNE Total	30.1	+ 34
TOTAL, JAN-JUNE	130.9	- 33
1 Mexico	38.3	+ 14
2 China	32.3	- 64
3 Canada	15.4	- 7
4 Philippines	8.7	+ 2
5 Singapore	8.7	+ 111

LACTOSE

Lactose prices are unchanged except for the bottom of the mostly price series moving lower. The spot market continues to face pressures caused by the African swine fever and trade issues with China. However, industry contacts suggest inventories are still mostly in check. Steady demand for preferred brands and aggressive selling by manufacturers have kept stockpiles from getting out of control. Some processors have also slowed production. Aggregate lactose supply and demand seem to be relatively well-balanced. Quarter 3 contract shipments are moving well, and some end users are taking extra loads, but market participants have some anxiety as they prepare for quarter 4. DAIRY MARKET NEWS Monthly Averages The July 2019 Dairy Market News average of the mostly price series for Central and West lactose was \$0.3085, compared to \$0.3150 in June, and \$.3099 one year ago.

Prices for: Central and Western U.S., Spot Sales And Up to 3 Month Contracts, F.O.B., Conventional, and Edible Lactose
Price Range - Non Pharmaceutical; \$/LB: .1800 - .4500
Mostly Range - Non Pharmaceutical; \$/LB: .2400 - .3650

U.S. Lactose Exports, H.S. Code 1702110000(FAS)

	2019 Exports (Million Lb.)	% Change From 1 Year Ago
JUNE Total	57.0	- 5
TOTAL, JAN-JUNE	319.7	- 10
1 China	54.3	- 34
2 Mexico	48.0	- 1
3 New Zealand	44.4	- 12
4 Japan	35.8	- 2
5 Singapore	20.8	+ 19

CASEIN

Rennet casein prices are mixed, stronger at the low end of the price range but weaker at the top. Rennet casein prices are closer to steady moving out toward November contracts, than they are with September contracts. Acid casein is steady at the low end of the price range but slightly higher at the top. Production is keeping contracted sale deliveries on schedule. New Zealand casein production is expected to follow the normal pattern of ramping higher in coming months. Casein contracting is well along for Q4 of the year.

Prices for: Spot Sales And Up to 3 Month Contracts, Free on Board - Warehouse, Non-Restricted, All Mesh Sizes, Conventional, and Edible Casein

Acid; Price Range - \$/LB: 3.1850-3.3075
Rennet; Price Range - \$/LB: 3.0800-3.4225

U.S. Dairy Cow Slaughter (1000 head) under Federal Inspection

WEEK ENDING	2019 WEEKLY DAIRY COWS	2019 CUMULATIVE DAIRY COWS	2018 WEEKLY DAIRY COWS	2018 CUMULATIVE DAIRY COWS
07/20/2019	57.4	1,809.6	56.1	1,730.8

WEBSITE: http://www.ams.usda.gov/mnreports/sj_ls714.txt

SOURCE: The slaughter data are gathered and tabulated in a cooperative effort by the Agricultural Marketing Service, the Food Safety and Inspection Service, and the National Agricultural Statistics Service, all of USDA

FEDERAL MILK ORDER CLASS III MILK PRICES (3.5% Butterfat)

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
2014	21.15	23.35	23.33	24.31	22.57	21.36	21.60	22.25	24.60	23.82	21.94	17.82
2015	16.18	15.46	15.56	15.81	16.19	16.72	16.33	16.27	15.82	15.46	15.30	14.44
2016	13.72	13.80	13.74	13.63	12.76	13.22	15.24	16.91	16.39	14.82	16.76	17.40
2017	16.77	16.88	15.81	15.22	15.57	16.44	15.45	16.57	16.36	16.69	16.88	15.44
2018	14.00	13.40	14.22	14.47	15.18	15.21	14.10	14.95	16.09	15.53	14.44	13.78

FEDERAL MILK ORDER CLASS IV MILK PRICES (3.5% Butterfat)

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
2014	22.29	23.46	23.66	23.34	22.65	23.13	23.78	23.89	22.58	21.35	18.21	16.70
2015	13.23	13.82	13.80	13.51	13.91	13.90	13.15	12.90	15.08	16.43	16.89	15.52
2016	13.31	13.49	12.74	12.68	13.09	13.77	14.84	14.65	14.25	13.66	13.76	14.97
2017	16.19	15.59	14.32	14.01	14.49	15.89	16.60	16.61	15.86	14.85	13.99	13.51
2018	13.13	12.87	13.04	13.48	14.57	14.91	14.14	14.63	14.81	15.01	15.06	15.09

FEDERAL MILK ORDER CLASS PRICES FOR 2019 (3.5% Butterfat)

CLASS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
I (BASE)	15.12	15.30	15.98	15.76	16.42	17.07	17.18	17.89				
II	15.74	16.13	16.61	16.38	16.48	17.30	17.61					
III	13.96	13.89	15.04	15.96	16.38	16.27	17.55					
IV	15.48	15.86	15.71	15.72	16.29	16.83	16.90					

Further information may be found at: <https://www.ams.usda.gov/rules-regulations/mmr/dmr>

**NATIONAL DAIRY PRODUCTS SALES REPORT
U.S. AVERAGES AND TOTAL POUNDS**

WEEK ENDING	BUTTER	CHEESE 40# BLOCKS	CHEESE BARRELS 38% MOISTURE	DRY WHEY	NDM
08/03/2019	2,3744 3,114,835	1,8386 13,379,129	1,7603 11,245,112	.3679 4,929,502	1.0235 33,754,467

Further data and revisions may be found on the internet at: <http://www.ams.usda.gov/rules-regulations/mmr/dmr>

**CME GROUP, INC FUTURES
Selected settling prices**

CLASS III MILK FUTURES (Pit-Traded) (\$/cwt)						NONFAT DRY MILK FUTURES (Pit-Traded) (¢/lb)					
DATE	08/02	08/05	08/06	08/07	08/08	DATE	08/02	08/05	08/06	08/07	08/08
AUG 19	17.29	17.44	17.57	17.50	17.54	AUG 19	102.58	102.35	102.50	102.75	102.45
SEP 19	17.79	17.81	17.90	17.80	17.79	SEP 19	103.85	103.90	103.70	104.25	104.00
OCT 19	17.76	17.78	17.88	17.80	17.81	OCT 19	105.95	106.35	105.50	106.38	105.68

CLASS IV MILK FUTURES (Pit-Traded) (\$/cwt)						WHEY (Electronic-Traded) (¢/lb)					
DATE	08/02	08/05	08/06	08/07	08/08	DATE	08/02	08/05	08/06	08/07	08/08
AUG 19	16.62	16.62	16.62	16.60	16.60	AUG 19	36.00	36.00	36.00	36.15	36.48
SEP 19	16.81	16.81	16.75	16.83	16.79	SEP 19	36.00	35.50	35.50	35.50	35.75
OCT 19	17.01	16.96	16.96	17.02	16.97	OCT 19	36.00	35.88	36.20	35.75	36.00

CASH SETTLED BUTTER FUTURES (Electronic-Traded) (¢/lb)						CHEESE CSC (Electronic-Traded) (\$/lb)					
DATE	08/02	08/05	08/06	08/07	08/08	DATE	08/02	08/05	08/06	08/07	08/08
AUG 19	234.50	234.70	235.00	234.75	235.05	AUG 19	1.80	1.82	1.83	1.82	1.83
SEP 19	236.35	236.50	236.00	236.00	235.25	SEP 19	1.85	1.86	1.86	1.86	1.85
OCT 19	237.00	236.60	236.75	236.50	236.10	OCT 19	1.85	1.86	1.86	1.86	1.85

Further information may be found at: <http://www.cmegroup.com/market-data/daily-bulletin.html>

ORGANIC DAIRY MARKET NEWS
Information gathered July 29 - August 9, 2019

ORGANIC DAIRY FLUID OVERVIEW

New England Organic Milk Sales and Sourcing. Federal Milk Market Order 1, in New England, reports the utilization of types of organic milk by pool plants. During June 2019, organic whole milk utilization totaled 14.1 million pounds, slightly lower than 14.2 million pounds one year earlier. June's 2019 butterfat content was 3.28 percent, unchanged from the previous year. Organic reduced fat milk utilization for June this year, nearly 15.4 million pounds, dipped from the 18.4 million pounds one year earlier. The butterfat content was 1.38 percent, well above the 1.32 percent last year.

U.S. Organic Milk Pay Price. The August 2019 farm gate organic milk pay price of a national organic dairy cooperative is \$29.24, with a twelve-month average price of \$31.30, based on 12.9 percent total solids. The organic pay price is the amount accepted by organic dairy producers who contract with a large national organic cooperative, and based on the geographic area where the organic milk is produced and whether it is grass milk.

May 2019 Average Organic Milk Farm Prices In Europe

	euros/100lt	(\$USD)	% Change April 2019	% Change May 2018
Austria	44.20	49.20	- 0.70	+ 2.93
Bavaria	46.93	52.56	- 0.73	- 2.50
France	40.90	45.81	+ 0.20	+ 1.07
Germany	46.93	52.56	- 0.78	- 1.18

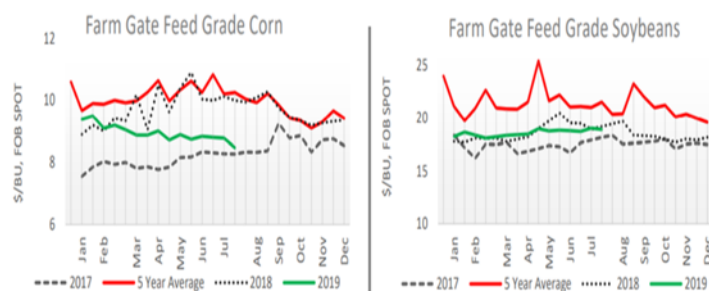
Dutch Organic Milk Pay Price. In the Netherlands, a large processor of organic milk announced the guaranteed price for organic milk increased from last month. The August 2019 price, 47.00 euros/100kg, (currently \$52.64 USD), is for organic milk with a fat content of 4.41 percent, a protein content of 3.47 percent, and a lactose content of 4.51 percent from a producer supplying an average of 600,000 kilos of organic milk annually.

Global Organic Market. Based on a recent study focusing on 23 countries, forecasts show a healthy growth for the organic industry in the coming years. Some areas that show signs of strength are new organic technologies, food security and strong marketing activities.

ORGANIC GRAIN FEEDSTUFF OVERVIEW

Organic Grain and Feed Market. Currently, market activities are light to moderate. Organic feed grade soybeans traded 13 cents lower on light purchases. Organic feed grade corn traded 30 cents lower with limited interests. Organic feed grade hard red winter (HRW) wheat and organic crude soybean oil demands and trades are good and active at this time. Trades are lackluster on all other organic grains this trading period.

Grower FOB Farm Gate Organic Grain									
Feed Grade	Unit	Spot Transactions				Forward Contracts		Cash Bids	
		Price Range	Avg.	Change	Prior Year	Price Range	Delivery Period	Price Range	
Yellow Corn	\$/bu	8.25 - 9.25	8.47	-0.30	10.00	N/A - N/A	N/A - N/A	9.00 - 9.00	
Soybeans	\$/bu	18.65 - 19.00	18.87	-0.13	N/A	N/A - N/A	N/A - N/A	19.00 - 19.00	
Wheat	\$/bu	N/A - N/A	N/A	N/A	N/A	N/A - N/A	N/A - N/A	N/A - N/A	
Oats	\$/bu	N/A - N/A	N/A	N/A	N/A	N/A - N/A	N/A - N/A	N/A - N/A	
Barley	\$/bu	N/A - N/A	N/A	N/A	N/A	N/A - N/A	N/A - N/A	N/A - N/A	

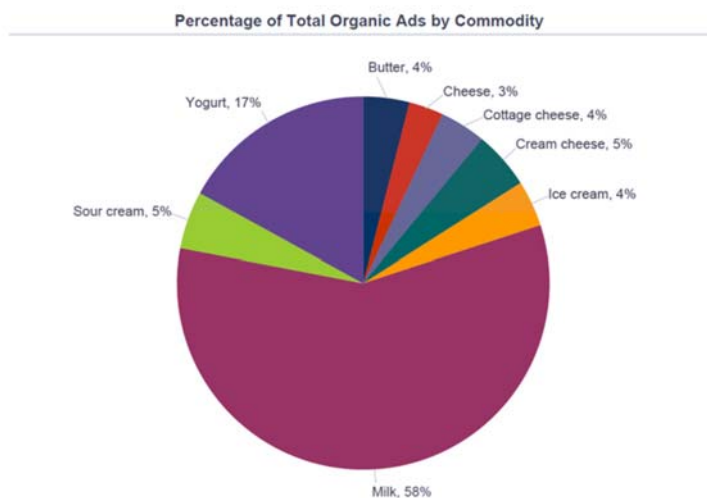


ORGANIC DAIRY RETAIL OVERVIEW

Across the United States, organic retail advertisements grew 1 percent compared to the previous survey period. Regionally, increases in ads were reported in parts of the East region, but ads decreased in the Midwest and Southwest regions. Organic milk advertisements in the Southeast saw a large percentage change in ads, up 314 percent, compared to last week.

The organic milk premium, the difference between the half gallon organic milk price and conventional milk price, \$2.04, shifted higher compared to the previous week's spread, \$1.34. The weighted average milk prices for organic and conventional half gallons this week are \$4.07 and \$2.03, respectively.

Organic yogurt ad numbers heightened this week, at 17 percent, 3 percent higher than last week, as a percentage of total organic ads by commodity. The percentages of all advertised organic dairy products, gathered from the weekly retail survey, are shown in the pie chart below.



Data source: USDA Dairy Market News

Advertising information presented is compiled from nearly 23,000 surveyed newspaper supermarket ads. Prices are valid from August 9-15, 2019. Retail survey ads reflect "advertised specials" and not the range of non-advertised supermarket cooler prices.

ORGANIC DAIRY MARKET NEWS
Information gathered July 29 - August 9, 2019

-CONTINUED FROM PAGE 8-

Product pricing information of selected organic dairy commodities, from the current weekly retail survey, is presented in the following table:

**NATIONAL RETAIL ORGANIC DAIRY
WEIGHTED AVERAGE ADVERTISED PRICE**

Commodity	<u>This Week</u>	<u>Last Week</u>	<u>Last Year</u>
Butter	\$5.99	\$5.99	\$6.39
Milk			
Half Gal.	\$4.07	\$3.61	\$3.89
Gal.	\$6.22	\$5.11	\$6.85
8 oz.UHT	n.a.	n.a.	\$0.88
Yogurt			
4-6 oz. Greek	n.a.	\$1.00	\$1.35
32 oz. Greek	\$5.20	\$5.44	\$6.49
4-6 oz. Yogurt	\$1.00	\$1.28	\$0.81
32 oz. Yogurt	\$3.50	\$2.89	n.a.

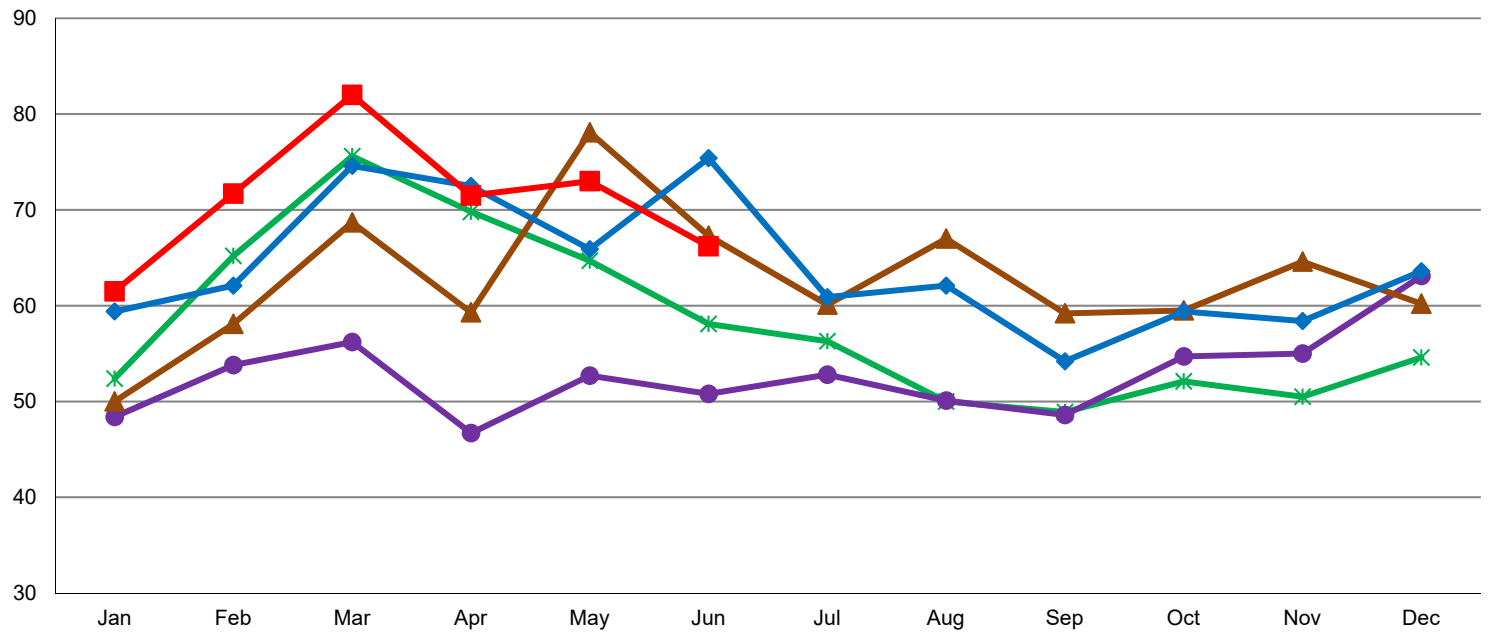
Complete results of the "National Retail Report-Dairy" and "Bi-Weekly Organic Report" are accessible using the following links:

¹ <https://www.ams.usda.gov/mnreports/dybretail.pdf>

² <https://www.ams.usda.gov/mnreports/dybdairyorganic.pdf>

Million Pounds

Cheese Exports (various H.S. Codes)

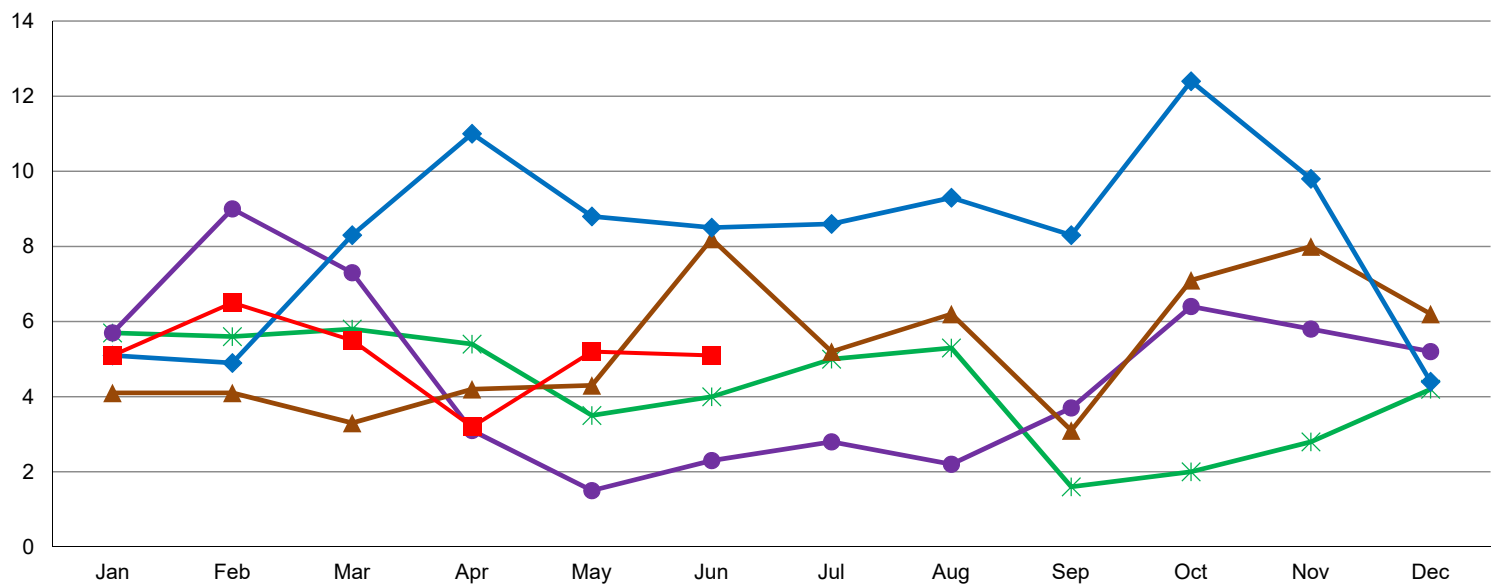


GRAPH USDA, DMN; SOURCE USDA, FAS

2015 2016 2017 2018 2019

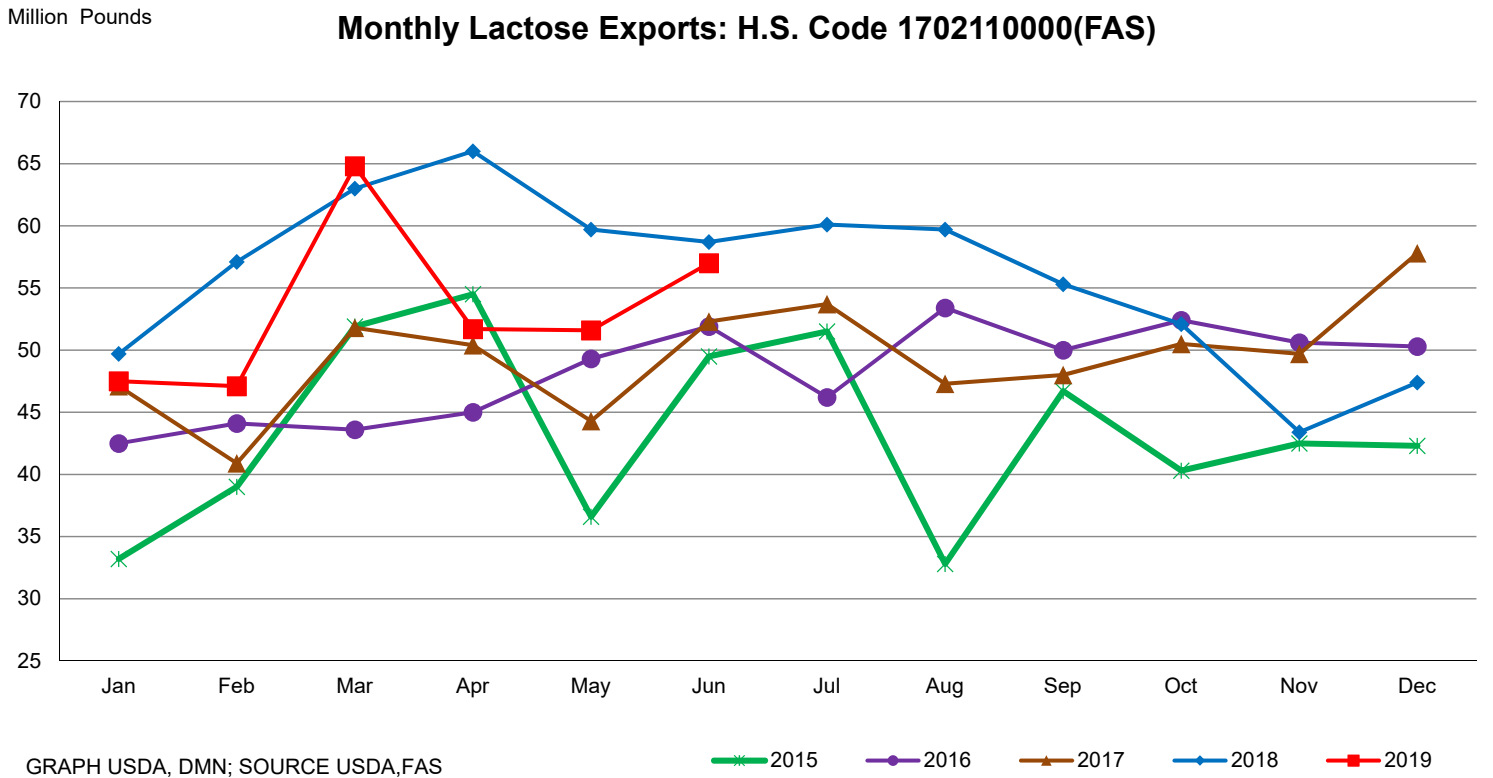
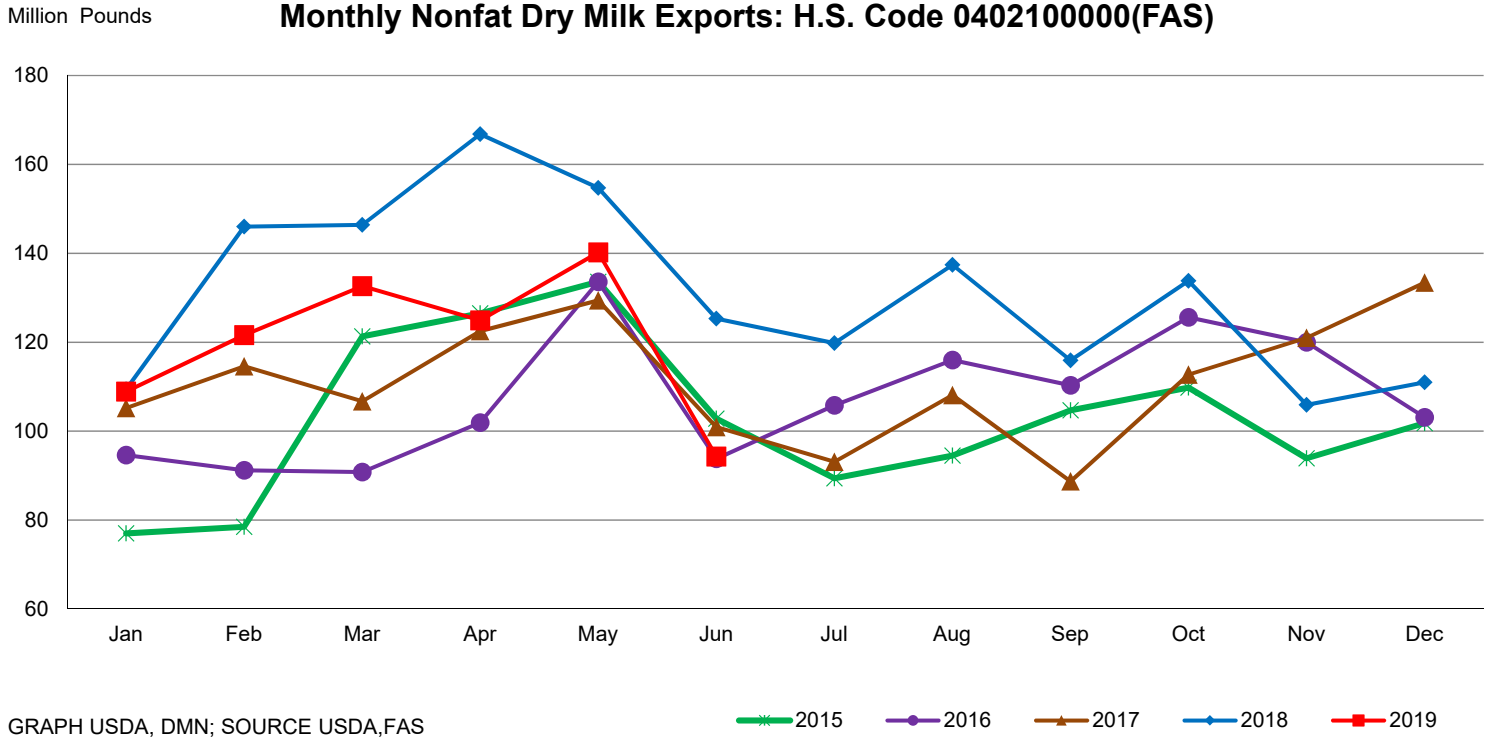
Million Pounds

U.S. Butter and Milkfat Exports (various H.S. Codes)



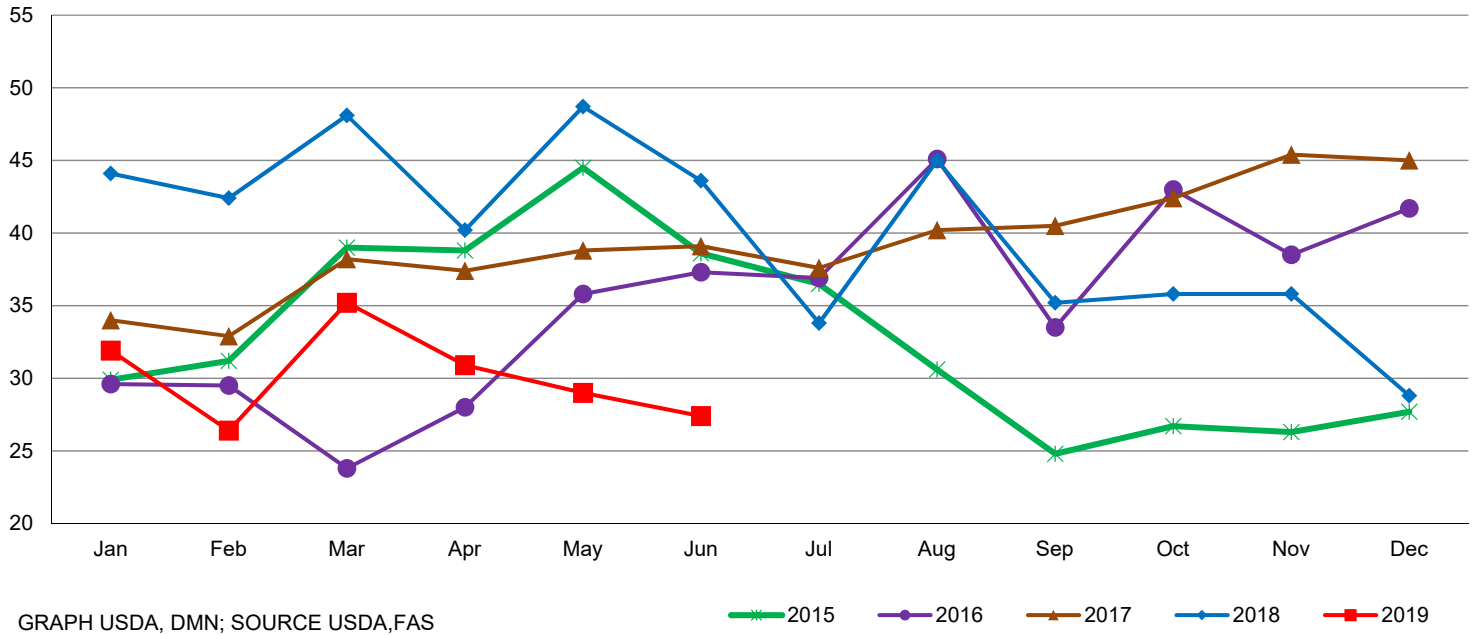
GRAPH, USDA, DMN; SOURCE, USDA, FAS

2015 2016 2017 2018 2019



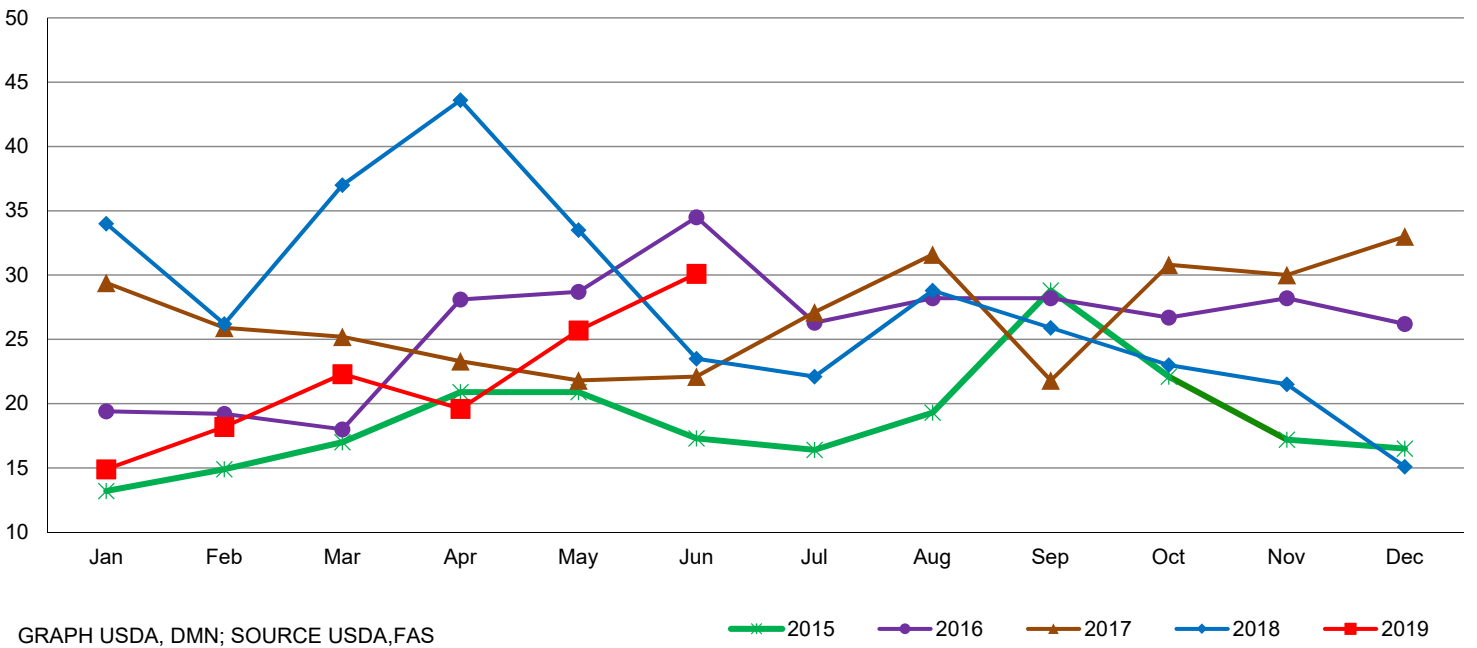
Million Pounds

Monthly Dry Whey Exports: H.S. Code 0404104000(FAS)



Million Pounds

Monthly WPC <80% Exports: H.S. Code 0404100500(FAS)





Dairy Market News Branch

Agricultural
Marketing
Service

National Retail Report-Dairy

Websites: <http://www.marketnews.usda.gov/mnp/da-home> and <http://www.ams.usda.gov/mnreports/dybretail.pdf>

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Friday, August 9, 2019

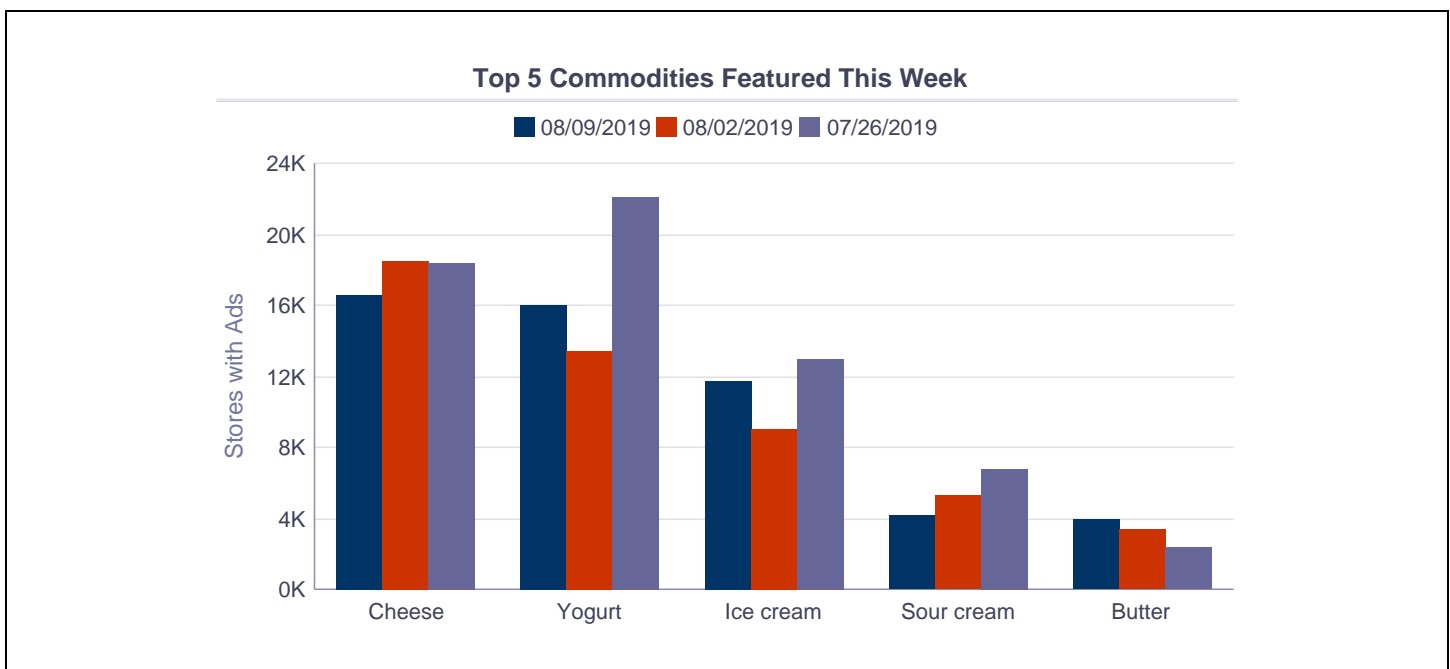
Advertised Prices for Dairy Products at Major Retail Supermarket Outlets ending during the period of 08/09/2019 to 08/15/2019

Conventional dairy ad numbers declined 2 percent this week. Organic dairy ad numbers increased 1 percent. There are over ten times more conventional dairy ads than organic dairy ads. The most advertised product/category this week is conventional ice cream in 48-64 oz. containers. The weighted average advertised price, \$2.97, decreased 5 cents from last week.

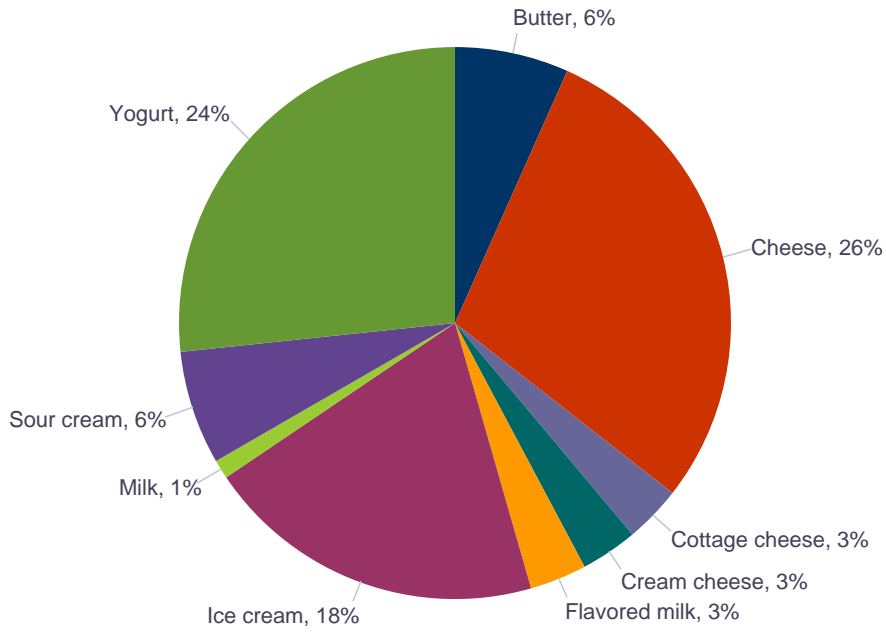
The national weighted average advertised price for conventional milk half gallons is \$2.03, compared to \$4.07 for organic milk half gallons, an organic price premium of \$2.04. Conventional half gallon milk ad numbers decreased 61 percent. Organic half gallon milk ad numbers decreased 7 percent. There are nearly twelve times the number of ads for organic milk half gallons as for conventional milk half gallons.

Conventional cheese ad numbers decreased 11 percent. Organic cheese ad numbers increased 9 percent. The weighted average price for conventional 8 oz. block cheese is \$2.14. The weighted average price for organic 8 oz. block cheese is \$3.99, resulting in a \$1.85 organic price premium.

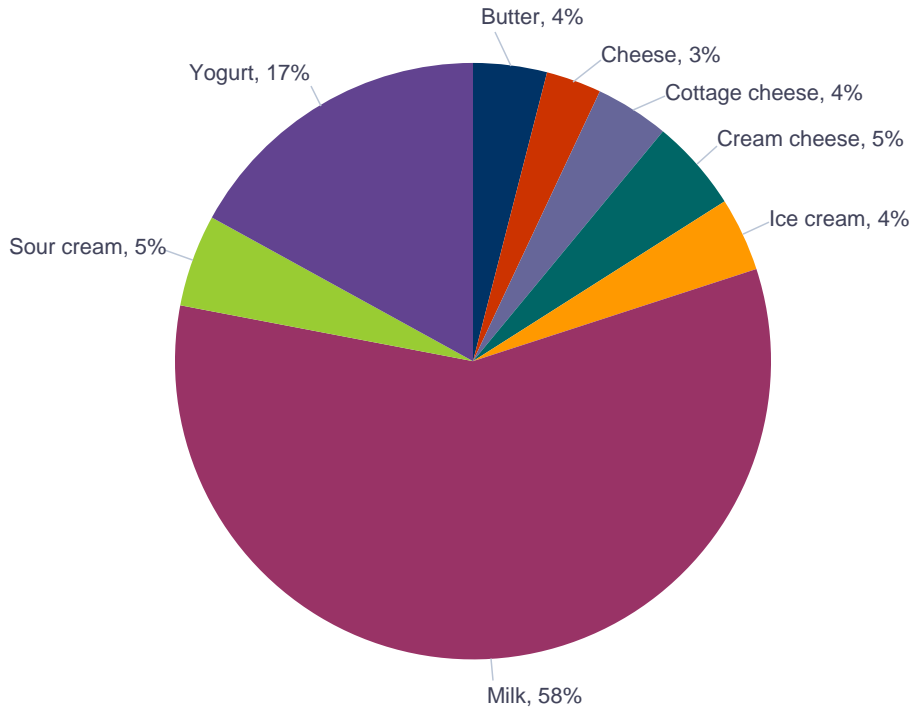
Conventional yogurt ad numbers increased 19 percent. Organic yogurt ads increased 26 percent. The weighted average advertised price for conventional yogurt in 4 to 6 oz. containers is \$0.51. The weighted average price for organic yogurt in 4 to 6 oz. containers, \$1.00, results in a \$0.49 organic price premium.



Percentage of Total Conventional Ads by Commodity



Percentage of Total Organic Ads by Commodity





NATIONAL -- CONVENTIONAL DAIRY PRODUCTS

Commodity	Type	Pack Size	THIS PERIOD		LAST WEEK		LAST YEAR	
			Stores With Ads	Wtd Avg Price	Stores With Ads	Wtd Avg Price	Stores With Ads	Wtd Avg Price
Butter		1 #	3771	3.22	3176	3.27	1532	4.08
Cheese	Natural Varieties	8 oz block	5713	2.14	7374	2.18	6481	2.39
Cheese	Natural Varieties	1 # block	3198	3.64	1511	4.23	1445	3.58
Cheese	Natural Varieties	2 # block	417	6.85	1621	5.43	512	6.41
Cheese	Natural Varieties	8 oz shred	4799	2.29	7070	2.22	5212	2.16
Cheese	Natural Varieties	1 # shred	2278	3.37	686	4.71	1212	3.69
Cottage cheese		16 oz	2048	2.00	3195	1.99	1433	1.91
Cream cheese		8 oz	1735	1.73	4813	2.36	6784	1.90
Flavored milk	All fat tests	half gallon	1204	1.93	273	2.37	529	3.19
Flavored milk	All fat tests	gallon	668	3.34	285	3.88	929	2.79
Ice cream		48-64oz	11431	2.97	8967	3.02	9162	2.90
Milk	All fat tests	half gallon	231	2.03	599	2.27	745	2.45
Milk	All fat tests	gallon	662	2.79	977	3.16	2126	3.33
Sour cream		16 oz	3898	1.81	5087	1.78	3070	1.73
Yogurt	Greek	4-6 oz	6800	.97	6888	.97	7955	.96
Yogurt	Greek	32 oz	2193	4.09	394	4.84	2064	4.60
Yogurt	Yogurt	4-6 oz	5400	.51	4658	.48	5416	.50
Yogurt	Yogurt	32 oz	619	1.95	659	2.54	945	2.87

REGIONAL -- CONVENTIONAL DAIRY PRODUCTS

Commodity	Type	Pack Size	NORTHEAST U.S.			SOUTHEAST U.S.			MIDWEST U.S.		
			Price Range	Stores with Ads	Wtd Avg Price	Price Range	Stores with Ads	Wtd Avg Price	Price Range	Stores with Ads	Wtd Avg Price
Butter		1 #	2.79-4.49	918	3.41	2.99-3.29	1677	3.18	2.49-3.49	477	2.84
Cheese	Natural Varieties	8 oz block	1.88-2.99	1371	2.20	1.29-3.00	2128	2.08	2.28-2.89	184	2.70
Cheese	Natural Varieties	1 # block	2.99-3.00	414	2.99	3.00-4.50	2085	3.78	2.99-3.50	192	3.17
Cheese	Natural Varieties	2 # block							5.98	57	5.98
Cheese	Natural Varieties	8 oz shred	1.50-3.29	1617	2.18	1.29-2.89	1069	2.28	1.67-2.99	499	2.17
Cheese	Natural Varieties	1 # shred	3.00-3.99	245	3.55	3.00-3.99	1089	3.08	2.99-4.99	427	3.31
Cottage cheese		16 oz	1.67-3.49	1248	2.23	1.50-1.67	489	1.52	1.49	116	1.49
Cream cheese		8 oz	1.55-2.39	764	1.79	1.50-2.00	471	1.57	1.29-1.98	114	1.64
Flavored milk	All fat tests	half gallon	1.99	63	1.99	2.50	214	2.50	1.50-1.99	477	1.61
Flavored milk	All fat tests	gallon							3.99	180	3.99
Ice cream		48-64oz	1.77-4.99	3309	3.00	1.99-4.99	3276	3.08	1.99-3.50	2124	2.56
Milk	All fat tests	gallon							2.50	69	2.50
Sour cream		16 oz	1.50-2.79	1106	2.00	1.50-2.00	1430	1.85	1.00-1.67	856	1.39
Yogurt	Greek	4-6 oz	0.80-1.25	1609	.99	0.99-1.00	2557	1.00	0.88-1.00	967	.95
Yogurt	Greek	32 oz	3.49-4.49	776	3.65	4.99	735	4.99	3.49-4.99	393	4.18
Yogurt	Yogurt	4-6 oz	0.50-0.69	1642	.57	0.40-0.50	2160	.47	0.38-0.60	655	.54

Wtd Avg - Simple weighted average



Commodity	Type	Pack Size	NORTHEAST U.S.			SOUTHEAST U.S.			MIDWEST U.S.		
			Price Range	Stores with Ads	Wtd Avg Price	Price Range	Stores with Ads	Wtd Avg Price	Price Range	Stores with Ads	Wtd Avg Price
Yogurt	Yogurt	32 oz	1.99-2.69	159	2.25				1.99	116	1.99

Commodity	Type	Pack Size	SOUTH CENTRAL U.S.			SOUTHWEST U.S.			NORTHWEST U.S.		
			Price Range	Stores with Ads	Wtd Avg Price	Price Range	Stores with Ads	Wtd Avg Price	Price Range	Stores with Ads	Wtd Avg Price
Butter		1 #	2.49	78	2.49	3.99	356	3.99	1.99-2.49	226	2.26
Cheese	Natural Varieties	8 oz block	1.88-2.50	1149	1.92	1.99-2.99	752	2.53	1.25	105	1.25
Cheese	Natural Varieties	1 # block	4.99	55	4.99	3.50-3.99	262	3.87	2.99-3.99	190	3.35
Cheese	Natural Varieties	2 # block				6.99	178	6.99	5.99-8.99	182	7.00
Cheese	Natural Varieties	8 oz shred	1.99-2.50	369	2.17	1.99-2.99	906	2.63	1.25-3.00	287	1.93
Cheese	Natural Varieties	1 # shred	2.99-4.99	133	3.82	3.99	315	3.99	3.99	69	3.99
Cottage cheese		16 oz	1.98-1.99	171	1.98						
Cream cheese		8 oz	1.50-2.50	281	2.04				1.25	105	1.25
Flavored milk	All fat tests	half gallon	1.99	305	1.99				1.50	121	1.50
Flavored milk	All fat tests	gallon	2.39	139	2.39	3.99	244	3.99	1.99	105	1.99
Ice cream		48-64oz	1.99-4.49	789	3.28	2.49-4.88	1427	3.07	1.99-3.99	422	2.71
Milk	All fat tests	half gallon	1.66-1.89	207	1.81						
Milk	All fat tests	gallon	2.99-3.50	173	3.34	2.69-2.98	315	2.82	1.99	105	1.99
Sour cream		16 oz	1.99-2.19	126	2.08	1.99	295	1.99	2.00	61	2.00
Yogurt	Greek	4-6 oz	0.88-1.00	427	.95	0.88-1.00	848	.91	0.79-0.88	358	.86
Yogurt	Greek	32 oz							2.89	289	2.89
Yogurt	Yogurt	4-6 oz	0.40-0.50	304	.42	0.50	445	.50	0.50-0.67	166	.56
Yogurt	Yogurt	32 oz	2.50	55	2.50				1.67	289	1.67

Commodity	Type	Pack Size	ALASKA U.S.			HAWAII U.S.		
			Price Range	Stores with Ads	Wtd Avg Price	Price Range	Stores with Ads	Wtd Avg Price
Butter		1 #	3.49-5.99	39	5.28			
Cheese	Natural Varieties	8 oz block				2.50	24	2.50
Cheese	Natural Varieties	8 oz shred	5.00	28	5.00	2.50	24	2.50
Cottage cheese		16 oz				2.50	24	2.50
Flavored milk	All fat tests	half gallon				4.69	24	4.69
Ice cream		48-64oz	2.99-6.99	50	5.23	3.99	34	3.99
Milk	All fat tests	half gallon				3.99	24	3.99
Sour cream		16 oz				2.25	24	2.25
Yogurt	Greek	4-6 oz				1.25	34	1.25
Yogurt	Yogurt	4-6 oz	1.25	28	1.25			

NATIONAL -- ORGANIC DAIRY PRODUCTS



Commodity	Type	Pack Size	THIS PERIOD		LAST WEEK		LAST YEAR	
			Stores With Ads	Wtd Avg Price	Stores With Ads	Wtd Avg Price	Stores With Ads	Wtd Avg Price
Butter		1 #	214	5.99	214	5.99	55	6.39
Cheese	Natural Varieties	8 oz block	161	3.99			137	5.99
Cheese	Natural Varieties	8 oz shred			148	3.53	328	3.17
Cottage cheese		16 oz	214	4.29			114	3.49
Cream cheese		8 oz	247	2.69	392	2.59	285	2.55
Ice cream		48-64oz	214	5.99				
Milk	All fat tests	half gallon	2732	4.07	2944	3.61	1347	3.89
Milk	All fat tests	gallon	347	6.22	621	5.11	974	6.85
Milk	All fat tests	8 oz UHT					768	.88
Sour cream		16 oz	289	2.49	214	2.50		
Yogurt	Greek	4-6 oz			230	1.00	307	1.35
Yogurt	Greek	32 oz	269	5.20	114	5.44	108	6.49
Yogurt	Yogurt	4-6 oz	137	1.00	168	1.28	354	.81
Yogurt	Yogurt	32 oz	522	3.50	227	2.89		

REGIONAL -- ORGANIC DAIRY PRODUCTS

Commodity	Type	Pack Size	NORTHEAST U.S.			SOUTHEAST U.S.			MIDWEST U.S.		
			Price Range	Stores with Ads	Wtd Avg Price	Price Range	Stores with Ads	Wtd Avg Price	Price Range	Stores with Ads	Wtd Avg Price
Butter		1 #				5.99	214	5.99			
Cheese	Natural Varieties	8 oz block	3.99	161	3.99						
Cottage cheese		16 oz				4.29	214	4.29			
Ice cream		48-64oz				5.99	214	5.99			
Milk	All fat tests	half gallon	3.69-4.99	894	4.24	3.79-4.00	1358	3.99			
Milk	All fat tests	gallon	5.97-7.99	226	6.50						
Yogurt	Greek	32 oz				5.00	214	5.00			
Yogurt	Yogurt	32 oz	3.49-3.50	465	3.50				3.50	57	3.50

Commodity	Type	Pack Size	SOUTH CENTRAL U.S.			SOUTHWEST U.S.			NORTHWEST U.S.		
			Price Range	Stores with Ads	Wtd Avg Price	Price Range	Stores with Ads	Wtd Avg Price	Price Range	Stores with Ads	Wtd Avg Price
Cream cheese		8 oz				2.69	178	2.69	2.69	69	2.69
Milk	All fat tests	half gallon	3.99	54	3.99	4.99	137	4.99	3.49	289	3.49

Wtd Avg - Simple weighted average



Commodity	Type	Pack Size	SOUTH CENTRAL U.S.			SOUTHWEST U.S.			NORTHWEST U.S.		
			Price Range	Stores with Ads	Wtd Avg Price	Price Range	Stores with Ads	Wtd Avg Price	Price Range	Stores with Ads	Wtd Avg Price
Milk	All fat tests	gallon	5.69	121	5.69						
Sour cream		16 oz							2.49	289	2.49
Yogurt	Greek	32 oz	5.99	55	5.99						
Yogurt	Yogurt	4-6 oz				1.00	137	1.00			

Commodity	Type	Pack Size	ALASKA U.S.			HAWAII U.S.		
			Price Range	Stores with Ads	Wtd Avg Price	Price Range	Stores with Ads	Wtd Avg Price

REGIONAL DEFINITIONS

As used in this report, regions include the following states:

- NORTHEAST U.S. Connecticut, Delaware, Massachusetts, Maryland, Maine, New Hampshire, New jersey, New York, Pennsylvania, Rhode Island and Vermont
- SOUTHEAST U.S. Alabama, Florida, Georgia, Mississippi, North Carolina, South Carolina, Tennessee, Virginia and West Virginia
- MIDWEST U.S. Iowa, Illinois, Indiana, Kentucky, Michigan, Minnesota, North Dakota, Nebraska, Ohio, South Dakota and Wisconsin
- SOUTH CENTRAL U.S. Arkansas, Colorado, Kansas, Louisiana, Missouri, New Mexico, Oklahoma, and Texas
- SOUTHWEST U.S. Arizona, California, Nevada and Utah
- NORTHWEST U.S. Idaho, Montana, Oregon, Washington, and Wyoming
- ALASKA Alaska
- HAWAII Hawaii
- NATIONAL Continental United States



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United States Department of Agriculture

Agricultural Marketing Service

Dairy Programs

Market Information Branch

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Additional Dairy Market News Information:

DMN Website: <https://www.ams.usda.gov/market-news/dairy>

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