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US Dairy Exports Declined 24% In October; Dairy Imports Fell 9%

October Cheese Exports Fell 4%, Cheese Imports Increased 9%; Lactose Exports Jumped 20%

Washington—US dairy exports during October were valued at \$615.9 million, down 24 percent from October 2022, according to figures released Wednesday by USDA's Foreign Agricultural Service (FAS).

During the first 10 months of 2023, dairy exports were valued at \$6.77 billion, down 16 percent from the first 10 months of 2022.

Leading markets for US dairy exports during the first 10 months of this year, on a value basis, with comparisons to the first 10 months of last year, were: Mexico, \$1.94 billion, down 4 percent; Canada, \$907.2 million, up 5 percent; China, \$520.9 million, down 21 percent; Japan, \$339.6 million, down 21 percent; Philippines, \$315.3 million, down 38 percent; Indonesia, \$279.5 million, down 28 percent; South Korea, \$266.1 million, down 46 percent; Australia, \$158.8 million, down 8 percent; Vietnam, \$122.7 million, down 37 percent; Dominican Republic, \$115.7 million, down 15 percent;

Colombia, \$106.3 million, down 15 percent; and Malaysia, \$105.3 million, down 47 percent.

US dairy imports during October were valued at \$422.9 million, down 9 percent from October 2022 (when dairy imports reached a monthly record high of \$466.3 million).

Dairy imports during the first 10 months of this year were valued at \$4.08 billion, up 8 percent from the first 10 months of last year.

Leading sources of US dairy imports during the January-October 2023 period, on a value basis, with comparisons to the same period in 2022, were: Ireland, \$580.0 million, down 4 percent; New Zealand, \$550.2 million, down 1 percent; Italy, \$428.2 million, up 1 percent; Canada, \$322.2 million, up 28 percent; France, \$285.6 million, up 5 percent; Mexico, \$241.9 million, up 12 percent; Netherlands, \$203.9 million, down 3 percent; Denmark, \$174.2 million, up 19 percent; Spain,

\$162.7 million, up 35 percent; and United Kingdom, \$141.2 million, up 53 percent.

US cheese exports during October totaled 78.6 million pounds, down 4 percent from October 2022. The value of those exports, \$179.0 million, was down 9 percent.

Cheese exports during the first 10 months of 2023 totaled 793.0 million pounds, down 5 percent from the first 10 months of 2022. The value of those exports, \$1.8 billion, was down 4 percent.

Leading markets for US cheese exports during the January-October 2023 period, on a volume basis, with comparisons to the same period in 2022, were: Mexico, 264.4 million pounds, up 18 percent; South Korea, 82.5 million pounds, down 43 percent; Japan, 76.8 million pounds, down 14 percent; Australia, 54.0 million pounds, up 10 percent; Canada, 36.5 million pounds, up 35 percent; Guatemala, 31.6 million pounds, up 49 percent; China, 23.3 million pounds, up 155 percent; Chile, 22.3 million pounds,

• See **Oct. Dairy Trade**, p. 9

Cheese Production Rose 0.8% In Oct.; Cheddar Output Fell 2.5%, Mozz Output Increased 2.3%

Washington—US cheese production during October totaled 1.19 billion pounds, up 0.8 percent from October 2022, USDA's National Agricultural Statistics Service (NASS) reported Monday.

Cheese production during the first 10 months of 2023 totaled 11.74 billion pounds, up 0.3 percent from the first 10 months of 2022.

Regional cheese production in October, with comparisons to October 2022, was: Central, 573.7 million pounds, down slightly; West, 474.7 million pounds, up 0.4 percent; and Atlantic, 146.0 million pounds, up 5.9 percent.

October cheese production in the states broken out by NASS, with comparisons to October 2022, was: Wisconsin, 297.1 million pounds, up 0.9 percent; California, 210.2 million pounds, up 2.1 percent; Idaho, 87.3 million pounds, up 2.5 percent; New Mexico, 85.2 million pounds, up 2.1 percent; New York, 77.6 million pounds, up 6.7 percent; Minnesota, 66.3 million pounds, down 4.2 percent; South Dakota, 46.0 million pounds, up 3.9 percent; Pennsylvania, 37.9 million pounds, up 5.6 percent; Iowa, 32.7 million pounds, up 1.6 percent; Ohio, 20.5 million pounds, up 4.8 percent; Vermont, 12.3 million

• See **Cheese Output Rises**, p. 6

USDA Lowers 2023, 2024 Milk Production Forecasts; Price Forecasts Mixed

Washington—The US Department of Agriculture (USDA), in its monthly supply-demand estimates released today, lowered its milk production forecast for 2023 and 2024, while changes to its dairy product and milk price forecasts for both years were mixed.

The milk production forecast for 2023 is lowered 200 million pounds from last month, to 226.9 billion pounds, due to slower expected growth in milk per cow. Milk production for 2024 is lowered by 1.0 billion pounds, to 229.0 billion pounds, due to lower

• See **Price Forecasts**, p. 11

Food Systems, Agriculture On Agenda At UN Climate Conference

Dubai—Food systems and agriculture are on the agenda here at COP28, the United Nation's climate change conference.

Some 134 world leaders signed up to COP28's agriculture, food and climate action declaration.

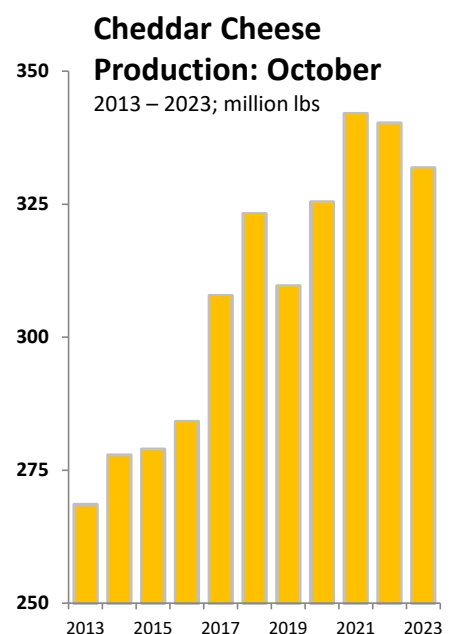
The declaration affirms that agriculture and food systems "must urgently adapt and transform in order to respond to the imperatives of climate change."

Countries signing the declaration declared their intent to work collaboratively and expeditiously to pursue several objectives, including: scaling-up adaptation and resilience activities and responses in order to reduce the vulnerability of all farmers and other food producers to the impacts of climate

change; promoting food security and nutrition by increasing efforts to support vulnerable people through various approaches; supporting workers in agriculture and food systems; strengthening the integrated management of water in agriculture and food systems at all levels; and maximizing the climate and environmental benefits associated with agriculture and food systems by conserving, protecting and restoring land and natural ecosystems, enhancing soil health and biodiversity, and shifting to more sustainable production and consumption approaches, including by reducing food loss and waste.

On Tuesday, a group of global food companies — including

• See **Food, Ag & Climate**, p. 4





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EDITORIAL COMMENT



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More Room For Per Capita Cheese Consumption Growth

When the issue of per capita cheese consumption is considered, the key question isn't whether it will continue to grow, but rather how high it will eventually reach. And the answer to that question, in our opinion, is a lot higher than it is today.

As reported on our front page last week, per capita cheese consumption in 2022 reached a record high of 40.14 pounds, up more than half a pound from 2021's record. With the exception of the COVID-19 year of 2020, per capita cheese consumption has set new records every year since 2011, according to figures from USDA's Economic Research Service.

To address the issue of how high per capita cheese consumption might eventually go, it might be worthwhile to look at how much it has already grown over the years. This is a great time to look at the history of US per capita cheese consumption, because it just reached a momentous milestone, topping 40 pounds for the first time ever.

So when did per capita cheese consumption first top the previous milestones of 10, 20 and 30 pounds? According to ERS statistics, per capita cheese consumption first topped 10 pounds in 1967 (at 10.0 pounds), first topped 20 pounds in 1983 (at 20.6 pounds), and first topped 30 pounds in 2001 (at 30.05 pounds).

There are several conclusions that can be reached from this brief look at cheese consumption milestones. First, milestones seem to be topped every other decade — that is, in the 1960s, 1980s, 2000s, and now 2020s — so we can expect per capita cheese consumption to reach 50 pounds sometime in the 2040s.

Second, per capita cheese consumption doesn't decline very frequently. For example, after reaching 30.05 pounds back in 2001, per capita cheese consumption declined just twice before

topping 40 pounds last year: in 2008 and in 2020.

Notably, both of those declines took place during major economic calamities, specifically the Great Recession and the COVID-19 pandemic, respectively.

And third, there are very few major "jumps" in per capita cheese consumption; that is, increases of one pound or more in a single year. For example, after per capita consumption reached 30.05 pounds in 2001, per capita cheese consumption has increased in all but two years, but only twice (in 2016 and 2021) have those increases been greater than one pound. And one of those increases (in 2021) followed one of the two declines over that period.

After topping the 40-pound mark, a couple of questions come to mind. First, is 50 pounds even possible?

Yes, it's definitely possible, for a couple of reasons. First, as history shows, increases in per capita cheese consumption are the rule, rather than the exception.

Per capita cheese consumption would obviously have to increase by half a pound per year to get to 50 pounds annually by around 2042. From 2001 to 2022, per capita cheese consumption actually posted 10 increases of more than half a pound, so getting to 50 pounds by 2042 seems to be possible if not probable.

And second, how do we get to that 50-pound milestone? There are numerous answers to that question, but we'll just touch on a few of them here.

First of all, to get to 50 pounds of per capita consumption in the next couple of decades, the US needs to act more like several European countries.

The International Dairy Federation's recently released *World Dairy Situation 2023* report includes per capita cheese consumption statistics for numerous countries, and several countries

From 2001 to 2022, per capita cheese consumption actually posted 10 increases of more than half a pound, so getting to 50 pounds by 2042 seems to be possible if not probable.

are (and have been) well above the 50-pound mark. Topping the list, at an impressive 62.3 pounds, is Denmark, followed by France at 60.3 pounds.

Other European countries with per capita cheese consumption above 50 pounds annually are Germany, Netherlands, Switzerland, Austria, Finland, Lithuania, Estonia, Cyprus, and Iceland. Greece is not included in the IDF's report, but we've seen estimates that per capita cheese consumption in Greece is above 60 pounds as well.

So if the US starts to consume cheese more like consumers in some European countries do, 50 pounds will be relatively easy to achieve.

That leads to another area of growth opportunity: cheese for breakfast. This is very popular in some European countries, but hasn't necessarily taken off in the US.

Getting more consumers to eat cheese for breakfast would go a long way toward helping boost per capita consumption to 50 pounds and beyond.

Yet another growth opportunity lies in the Hispanic cheese category. Like overall per capita consumption, per capita Hispanic cheese consumption also reached a milestone last year, topping one pound for the first time (at 1.05 pounds).

Per capita Hispanic cheese consumption has more than tripled since 2000, and in fact has only declined once since then (in 2012). Considering how popular Mexican and Southwest cuisines are in the US, it's probably safe to assume that Hispanic cheese consumption will continue to increase in the future.

The US reached another major cheese consumption milestone last year. Those milestones don't come along very often, but for numerous reasons, we expect to see another one reached within the next couple of decades.

Global Dairy Trade Price Index Rises 1.6%; Mozzarella Debuts At \$2.00

Auckland, New Zealand—The price index on this week's semi-monthly Global Dairy Trade dairy commodity auction increased 1.6 percent from the previous auction, held two weeks ago.

In this auction, prices were higher for Cheddar, skim milk powder, whole milk powder, butter, lactose and buttermilk powder.

Mozzarella was sold for the first time on the GDT auction this week. The Mozzarella is being offered by Solarec, a Belgian company that's 100 percent owned by five cooperatives.

Results from this week's GDT auction, with comparisons to the previous auction, were as follows:

Cheddar cheese: The average winning price was \$3,986 per metric ton (\$1.81 per pound), up 9.7 percent. Average winning prices were: Contract 1 (January), \$4,010 per ton, up 2.4 percent; Contract 2 (February), \$3,986 per ton, up 15.5 percent; Contract 3 (March), \$3,995 per ton, down 2.7 percent; Contract 4 (April), \$3,921 per ton, up 13.9 percent; Contract 5 (May), \$4,045 per ton, down 0.1 percent; and Contract 6 (June), \$4,060 per ton, down 0.7 percent.

Mozzarella cheese: The average winning price was \$4,005 per ton (\$2.00 per pound). That was for Contract 2.

Skim milk powder: The average winning price was \$2,671 per ton (\$1.21 per pound), up 1.2 percent. Average winning prices were: Contract 1, \$2,677 per ton, up 1.4 percent; Contract 2, \$2,651 per ton, up 1.1 percent; Contract 3, \$2,670 per ton, up 1.5 percent; Contract 4, \$2,703 per ton, up 0.2 percent; and Contract 5, \$2,775 per ton, up 1.4 percent.

Whole milk powder: The average winning price was \$3,104 per ton (\$1.41 per pound), up 2.1 percent. Average winning prices were: Contract 1, \$3,097 per ton, up 2.3 percent; Contract 2, \$3,071 per ton, up 2.2 percent; Contract 3, \$3,105 per ton, up 2.2 percent; Contract 4, \$3,213 per ton, up 1.4 percent; and Contract 5, \$3,240 per ton, up 2.0 percent.

Butter: The average winning price was \$4,936 per ton (\$2.24 per pound), up 0.7 percent. Average winning prices were: Contract 1, \$4,875 per ton, down 2.3 percent; Contract 2, \$4,921 per ton, up 0.8; Contract 3, \$4,973 per ton, up 0.5 percent; Contract 4, \$4,931 per ton, up 1.4 percent; and Contract 5, \$5,060 per ton, up 4.6 percent.

Anhydrous milkfat: The average winning price was \$5,573 per ton (\$2.53 per ton), unchanged. Average winning prices were: Contract 1, \$5,656 per ton, down 6.8 percent; Contract 2, \$5,576 per ton, up 1.5 percent; Contract 3, \$5,574

per ton, up 0.5 percent; Contract 4, \$5,561 per ton, up 0.5 percent; and Contract 5, \$5,524 per ton, down 0.7 percent.

Lactose: The average winning price was \$793 per ton (36.0 cents per pound), up 5.3 percent. That was for Contract 2.

Buttermilk powder: The average winning price was \$2,387 per ton (\$1.08 per pound), up 2.8 percent. Average winning prices were: Contract 1, \$2,395 per ton, up 1.1 percent; Contract 2, \$2,381 per ton, up 1.9 percent; Contract 3, \$2,395 per ton, up 4.4 percent; Contract 4, \$2,395 per ton, up 5.0 percent; and Contract 5, \$2,405 per ton, up 4.3 percent.

In related news, Fonterra on Thursday increased its forecast farmgate milk price and earnings guidance for fiscal year 2024. The forecast farmgate milk price midpoint for the 2023/24 season is up 25 cents, to \$7.50 per kilogram of milk solids, with the forecast range moving from \$6.50-\$8.00 per kilogram of milk solids to \$7.00-\$8.00 per kilogram of milk solids.

Miles Hurrell, Fonterra CEO, said the revised forecast reflects recent strengthening in demand for reference commodity products from key importing regions, including improvement in demand from China during the first quarter.

"Global Dairy Trade prices have lifted, and our sales book is also well contracted for this time of year, giving us confidence to

increase our forecast farmgate milk price," Fonterra's Hurrell said.

ASB Bank is retaining its \$7.35 per kilogram of milk solids farmgate milk price for the season. ASB noted that, since bouncing off their August lows, dairy prices have struggled to maintain momentum.

The overall GDT index is currently around 17 percent off its lowest point but has essentially flatlined over the last four auctions.

ASB also noted that whole milk powder offer volumes were reduced by close to 20 percent this GDT auction compared with the last one, so the price gains probably aren't reflective of much increase in underlying demand.

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Food, Ag & Climate

Continued from p. 1)

the Bel Group, Danone, Lactalis USA, Nestle, General Mills, and Kraft Heinz — was convened by the Environmental Defense Fund (EDF) to launch the Dairy Methane Action Alliance (DMAA).

EDF is now calling on all companies in the global dairy supply chain to join this effort to expedite a global shift to climate-smart dairy, and deliver larger impact and scale.

“Dairy companies can be part of the fight against climate change by reducing methane pollution. This is an exciting step forward in putting methane action front and center for the dairy sector,” said Fred Krupp, EDF’s president. “This historic group represents the leadership we need not just from dairy companies, but from food producers everywhere.”

“Time is of the essence when it comes to helping farmers adapt to and mitigate climate change,” said Rolf Carlson, vice president corporate social responsibility, Lactalis USA. “DMAA provides a forum for collaboration among processors, farmers, and researchers where we can identify and elevate the best solutions to accelerate progress on reducing methane emissions, one of the most potent climate pollutants.”

“We are thrilled to be a co-founding member of this Alliance, to position the dairy sector as part of the solution to fight against climate change while giving access to nutritious, responsible and affordable food for all,” said Simon Bonnet, sustainable milk purchasing director for the Bel Group.

The International Dairy Federation (IDF) welcomed the launch

of the DMAA “as a collaborative action agenda to raise methane ambition and collectively accelerate methane reduction,” said Caroline Emond, IDF director general. “DMAA is a good example of how, with its dynamic nature, forward thinking and collection action, the sector will be able to address the triple challenge of providing food security, livelihoods, and environmental sustainability in a rapidly changing world.”

Last Friday, the World Economic Forum, with support from the government of the United Arab Emirates, along with more than 20 corporate and research partners in the food sector, launched the First Movers Coalition for Food. Initial partners in the Coalition include, among others, Danone, Nestle, Olam Agri, PepsiCo, and Cargill.

The new initiative aims to accelerate sustainable farming and production methods and technologies by leveraging collective demand for low-carbon agricultural commodities. It will do so through the power of aggregated demand, aiming for a combined procurement value for low-carbon commodities of \$10 to \$20 billion from coalition members.

The Bezos Earth Fund called for a greater focus and commitment to transforming food systems. The Earth Fund announced \$57 million in food-related grants to tackle the dual threats of climate change and biodiversity loss.

Together with the Global Methane Hub’s Enteric Methane R+D Accelerator, the Earth Fund is investing \$30 million in a range of innovations to reduce methane emissions from livestock by as much as 30 percent in the next 10 to 15 years.

Additional grants provide funding to identify and develop low-methane feed, low-methane cattle breeding, and using a wearable sensor to measure cow methane emissions.

The Meat Institute and the Protein PACT for the People, Animals and Climate of Tomorrow highlighted animal agriculture’s commitments and progress toward global goals in multiple engagements at COP28. The Meat Institute is an accredited COP28 observer, and the Protein PACT is a principal sponsor of the Inter-American Institute for Cooperation on Agriculture’s (IICA) Sustainable Agriculture of the Americas Pavilion.

In addition to convening experts on livestock production and consumption across multiple COP28 pavilions, IICA and the Protein PACT today co-hosted a reception celebrating sustainable agriculture of the Americas, highlighting the role of dairy and meat.

“We look forward to engaging throughout the summit to verify progress toward sustaining nutrient-dense foods like meat and dairy for generations to come, including by sharing the Meat Institute’s pioneering greenhouse gas inventory tool and sector-wide data reporting,” said Eric Mittenhal, Meat Institute chief strategy officer.

As the UN Food and Agriculture Organization (FAO) has concluded, “meat, eggs and milk offer crucial sources of much-needed nutrients which cannot easily be obtained from other sources, and producing these foods supports the livelihoods of millions throughout the Americas and around the world,” said Dr. Manuel Otero, IICA director general.

FROM OUR ARCHIVES

50 YEARS AGO

Dec. 7, 1973: Washington—Terry McCabe, chief of USDA’s Foreign Agricultural Service, passed away this week from surgery complications. A veteran ag economist and recognized expert on international trade in dairy products, McCabe has headed the agriculture import branch since 1963.

Los Angeles—A strike-lockout in more than 1,000 food markets in Southern California is putting an estimated 100,000 employees temporarily out of work, and threatening housewives with some shortages and higher overall food prices.

25 YEARS AGO

Dec. 11, 1998: Washington—The National Cheese Institute reiterated the need for updated federal cheese standards of identity that allow the US cheese industry to grow and compete in an increasingly global and competitive food market. Intended standards of identity would apply to both processed cheese and natural cheese.

Washington—Reflecting continued strong cheese markets, the US Department of Agriculture has increased its milk price forecast for 1998/99 by more than 50 cents per hundredweight. The USDA is projecting that the Basic Formula Price for the 1998/99 will average \$13.45 to \$14.05 per hundredweight.

10 YEARS AGO

Dec. 6, 2013: Washington—The Pan-American Dairy Federation (FEPALE) passed a resolution in opposition of EU efforts to restrict the use of common food names. The European Union has been working aggressively within its trade agreement partners in Latin America, Canada and elsewhere, to restrict common cheese names like Feta, Asiago, Gorgonzola and Parmesan.

California—The reported November minimum price for California’s Class 4a milk price was \$20.63 up \$2.36 from November 2012. The California Class 4b was reported at \$17.30 down \$1.18 from November 2012.

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JCS Controls To Expand Operations In Rochester, NY

Rochester, NY—Food and beverage engineering and consulting company JCS Controls Inc. is expanding its operations here, Empire State Development (ESD) announced recently.

JCS Controls specializes in advanced process and control systems designs that are focused on the food and beverage industry. The company plans to build an additional 15,000 square feet of fabrication space onto its existing Metro Park facility in the town of Brighton, Monroe county, NY.

The upgrades will allow for the installation of state-of-the-art welding and air filtering systems, and for the repurposing of space to accommodate the growth of the company’s engineering team, ESD noted.

USDA Lowers Fiscal 2024 Dairy Export Forecast, Hikes Import Forecast

Washington—The US Department of Agriculture (USDA), in its quarterly “Outlook for US Agricultural Trade” report released Thursday, reduced its dairy export forecast for fiscal year 2024 and raised its fiscal 2024 dairy import forecast.

USDA’s dairy export forecast for fiscal 2024, which runs from Oct. 1, 2023, through Sept. 30, 2024, is lowered \$200 million from the agency’s August forecast, to \$7.2 billion, on decreased price competitiveness for US exports of a number of products, including cheese, butter, skim milk powder, and whey.

US dairy exports during fiscal 2023 were valued at \$8.5 billion, down 6.6 percent, or \$601 million, from fiscal 2022’s record export value of \$9.09 billion.

USDA’s dairy import forecast for fiscal 2024 is raised by \$100 million from August, to \$5.4 billion, as higher US butter prices support demand for imported butter from Ireland and New Zealand.

During fiscal 2023, US dairy imports were valued at a record \$5.28 billion, up 14.7 percent, or \$678 million, from fiscal 2022.

USDA’s cheese import forecast for fiscal 2024 is unchanged from August, at \$1.8 billion. During fiscal 2023, US cheese imports were valued at \$1.7 billion, up 10.4 percent, or \$160 million, from fiscal 2022.

For fiscal 2024, overall US agricultural exports are projected at \$169.5 billion, down \$2.5 billion from the August forecast. This revision is primarily driven by reductions in grain and feed, as well as dairy, livestock and poultry exports.

US agricultural exports during fiscal 2023 were valued at \$178.7 billion, down 7.5 percent, or \$14.4 billion, from fiscal 2022.

US agricultural imports for fiscal 2024 are forecast at \$200.0 billion, up \$500 million from the August projection, largely driven by the strong US dollar and resilient domestic demand for agricultural imports.

During fiscal 2023, US agricultural imports were valued at \$195.4 billion, up 0.6 percent, or \$1.2 billion, from fiscal 2022.

These USDA forecasts would result in a US agricultural trade deficit of \$30.5 billion for fiscal 2024, up from a fiscal 2023 agricultural trade deficit \$16.7 billion and up from a fiscal 2022 agricultural trade deficit of \$1.1 billion. The US ran an ag trade surplus of \$8.5 billion in fiscal 2021.

Federal Order Hearing Testimony Continues Class I Differential Focus

Carmel and Zionsville, IN—Testimony late last week and throughout this week at USDA’s national federal milk marketing order (FMMO) hearing continued to focus on Class I differentials.

California’s Milk Producers Council (MPC) fully supports Proposal 19, submitted by National Milk Producers Federation (NMPF) which would adjust Class I differentials for all 3,108 named counties in the continental US, said Geoff Vanden Heuvel, MPC’s director of regulatory and economic affairs.

MPC also supports Proposal 21, submitted by the American Farm Bureau Federation, which seeks to raise the Class II differential, Vanden Heuvel said.

Mike Herting, director of operations and accounting for the Southeast Area of Dairy Farmers of America (DFA), testified on behalf of DFA and NMPF in support of Proposal 19.

This action is a much-needed step to help dairy farmers recover a small portion of the additional costs they have been burdened with since the price surface was last updated, Herting said. Declining milk production in the Southeast, combined with the closing of processing plants, forces milk to move farther to markets at greater transportation expense. The farmers that continue to supply these markets, through their milk marketing cooperatives, bear the majority of these costs.

Monty Schilter, senior vice president of Northwest Dairy Association (NDA), testified in support of the Class I differentials in Proposal 19 for the states of Washington, Oregon, Idaho and Montana.

The points he supported in his testimony were the importance of regional competitiveness at the farm level, continued incentives to service Class I markets in the rapidly changing landscape of the dairy industry in the Pacific Northwest, and geographic and population influence cost drivers in the Pacific Northwest.

Steve Stout, vice president and regional controller for the Mountain and Western Areas of DFA, testified on behalf of DFA and NMPF in support of Proposal 19.

Brad Parks, director, financial planning and analysis, business development, Michigan Milk Producers Association (MMPA), testified in support of Proposal 19.

Class I differentials are outdated and need updating to reflect the market changes that have occurred since the last update in 2000, Parks said. NMPF’s proposal to change Class I differentials “does not attempt to capture all increased costs” but “strives to achieve a balanced approach of updating the federal milk order system and its implementation.”

Ed Gallagher, president of DFA Risk Management, a business unit of DFA, testified on behalf of DFA and NMPF in support of Proposal 19. He explained the importance of implementing a price surface in Colorado that differs from the results of the University of Wisconsin’s model analysis of a national pricing surface.

That model’s results “would unfairly and harmfully impact Colorado dairy farmer milk prices,” Gallagher said.

Jeff Sims, secretary and chief market analysis officer of Lone Star Milk Producers, testified on behalf of NMPF in support of

Proposal 19, and highlighted the “urgent need” for updating and improving the federal order Class I pricing structure.

Opposition To Proposal 19

Joe Carson, president and owner of United Dairy Inc., stressed three points in opposition to NMPF’s Proposal 19:

- The current Class I differentials “have attracted plenty of milk for our customers and ultimately our schools and local consumers.”

- Class I sales are forecasted to continue to drop, so increasing differentials “makes no sense.”

- Independent family-owned plants have “shrunk mightily” in the 35 years that Carson has been managing United Dairy, and while his company has been fortunate to survive and grow, “the proposal by the NMPF would be the death knell of our company.”

Joe Shockey, a veterinarian and a dairy producer who is a supplier to United Dairy, said USDA needs to consider the “strong likelihood” of a nutritional gap that would be created if Proposal 19 results in the loss of local processing capacity. He said he’s “deeply concerned” that proposal 19 “will over time place our processing partners at an unfair disadvantage to other dairy processors in the expanded region.”

Jim Hau is president and CFO for Maple Hill Creamery, which he described as a pioneer in the grass-fed organic milk segment.

Because Maple Hill pays its farmers well above FMMO rates, “they do not get any benefit from pooling funds,” Hau stated. Pooling is a “material hit” to profitability of small, growing companies and, therefore, impedes innovation, even before the proposed increases in Class I differentials, “which will materially worsen the situation.”

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Cheese Output Rises

(Continued from p. 1)

pounds, up 0.9 percent; New Jersey, 6.3 million pounds, up 13.2 percent; and Illinois, 5.8 million pounds, up 2.4 percent.

Cheese output in all other states totaled 208.9 million pounds, down 4.1 from October 2022.

American-type cheese production totaled 474.1 million pounds, down 0.3 percent from October 2022. American-type cheese output during the January-October 2023 period totaled 4.77 billion pounds, up 1.8 percent from the same period last year.

Production of American-type cheese, with comparisons to October 2022, was: Wisconsin, 91.1 million pounds, up 2.3 percent; Minnesota, 55.4 million pounds, down 7.2 percent; California, 42.8 million pounds, down 6.0 percent; Iowa, 17.1 million pounds, down 2.9 percent; and New York, 12.3 million pounds, up 13.5 percent.

Production of American-type cheese in all other states in October totaled 255.4 million pounds, up 1.0 percent from October 2022.

Cheddar production totaled 331.8 million pounds, down 2.5 percent from October 2022. Cheddar output during the first 10 months of 2023 totaled 3.34 billion pounds, up 1.3 percent from the first 10 months of 2022.

Production of other American-type cheeses during October totaled 142.2 million pounds, up 5.2 percent from October 2022.

Italian & Other Cheeses

Production of Italian-type cheese totaled 506.4 million pounds, up 1.4 percent from October 2022.

Italian cheese production during the first 10 months of this year totaled 4.87 billion pounds, down 0.8 percent from the first 10 months of last year.

Production of Italian cheese in the states, with comparisons to October 2022, was: California, 141.7 million pounds, up 3.7 percent; Wisconsin, 141.6 million pounds, up 0.9 percent; New York, 31.2 million pounds, up 1.7 percent; Pennsylvania, 22.8 million pounds, up 2.5 percent; Minnesota, 10.8 million pounds, up 16.4 percent; and New Jersey, 3.3 million pounds, up 13.0 percent.

Mozzarella production totaled 399.4 million pounds, up 2.3 percent from October 2022. Mozzarella output during the January-October period totaled 3.84 billion pounds, down 0.1 percent from a year earlier.

Production of other Italian cheese varieties, with comparisons to October 2022, was: Parmesan, 40.5 million pounds, down 6.2 percent; Provolone, 31.6 million pounds, down 2.4 percent; Ricotta, 23.6 million pounds, up 12.2 percent; Romano, 4.0 million pounds, down 2.3 percent; and other Italian types, 7.3 million pounds, down 8.4 percent.

Production of other cheese varieties, with comparisons to October 2022, was:

Swiss cheese: 26.5 million pounds, down 1.6 percent.

Cream and Neufchatel: 98.7 million pounds, up 6.8 percent.

Brick and Muenster: 16.5 million pounds, up 0.1 percent.

Hispanic cheese: 35.9 million pounds, up 5.7 percent.

Blue and Gorgonzola: 7.4 million pounds, down 1.4 percent.

Feta: 11.6 million pounds, down 20.0 percent.

Gouda: 3.6 million pounds, up 2.2 percent.

All other types of cheese: 13.8 million pounds, down 5.7 percent.

Whey Products Production

October production of dry whey, human, totaled 72.2 million

pounds, down 2.6 percent from October 2022. Manufacturers' stocks of dry whey, human, at the end of October totaled 72.2 million pounds, up 7.6 percent from a year earlier but down 10.0 percent from a month earlier.

Lactose production, human and animal, totaled 91.4 million pounds in October, down 0.1 percent from October 2022. Manufacturers' stocks of lactose, human and animal, at the end of October totaled 117.3 million pounds, down 28.5 percent from a year earlier and down 9.6 percent from a month earlier.

Production of whey protein concentrate, human, during October totaled 39.2 million pounds, up 1.5 percent from October 2022. Manufacturers' stocks of WPC, human, at the end of October totaled 61.9 million pounds, down 16.2 percent from a year earlier and down 15.2 percent from a month earlier.

Output of whey protein isolates totaled 10.4 million pounds, up 3.8 percent from October 2022.

Manufacturers' stocks of WPI at the end of October totaled 17.7 million pounds, down 4.2 percent from a year earlier and down 3.6 percent from a month earlier.

Butter & Dry Milk Products

Butter output totaled 160.6 million pounds, down 0.9 percent from October 2022. Butter during the first 10 months of 2023 totaled 1.75 billion pounds, up 3.0 percent from the first 10 months of 2022.

Regional butter production in October, with comparisons to October 2022, was: West, 86.7 million pounds, up 0.1 percent; Central, 62.5 million pounds, down 2.8 percent; and Atlantic, 11.5 million pounds, up 1.9 percent.

Nonfat dry milk production totaled 127.4 million pounds, down 1.2 percent from October

2022. NDM output during the January-October period totaled 1.62 billion pounds, down 1.4 percent from the same period in 2022.

Manufacturers' shipments of nonfat dry milk totaled 139.4 million pounds, down 8.8 percent from October 2022. Manufacturers' stocks of NDM at the end of October totaled 223.6 million pounds, down 10.8 percent from a year earlier and down 7.1 percent from a month earlier.

Production of other dry milk products with comparisons to October 2022, was: skim milk powder, 42.5 million pounds, down 34.9 percent; dry whole milk, 9.5 million pounds, down 20.7 percent; milk protein concentrate, 15.4 million pounds, down 14.7 percent; and dry buttermilk, 12.5 million pounds, up 15.6 percent.

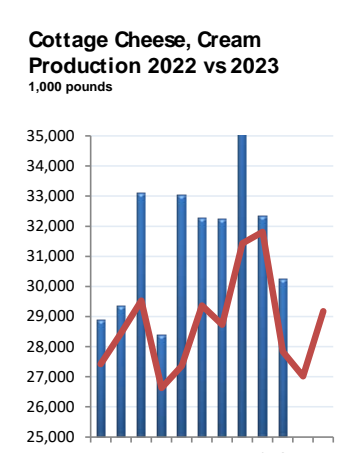
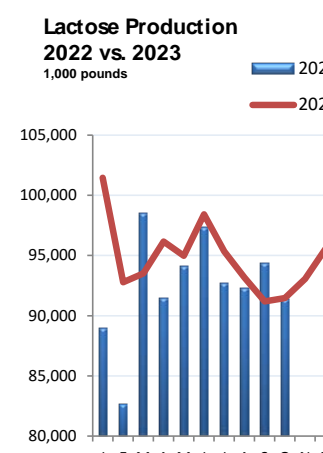
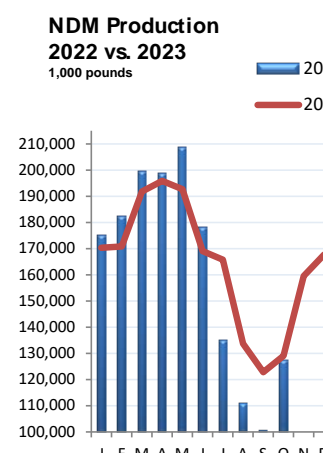
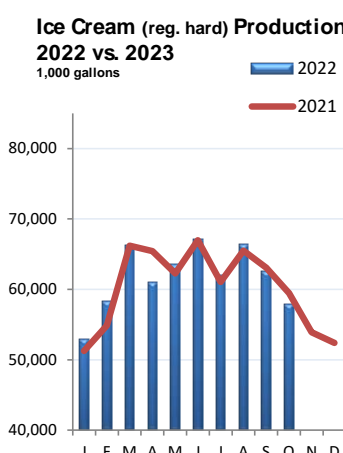
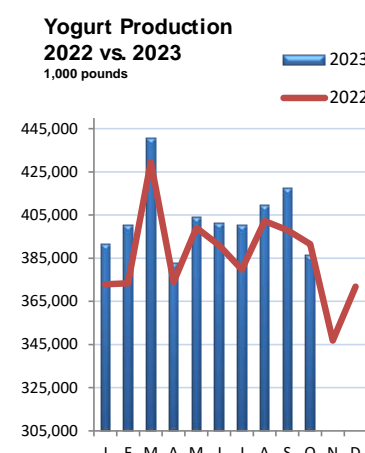
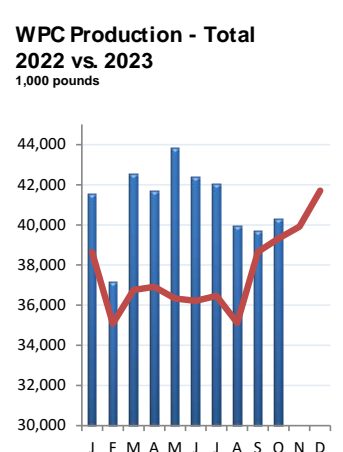
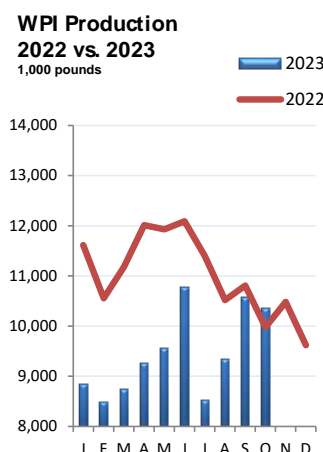
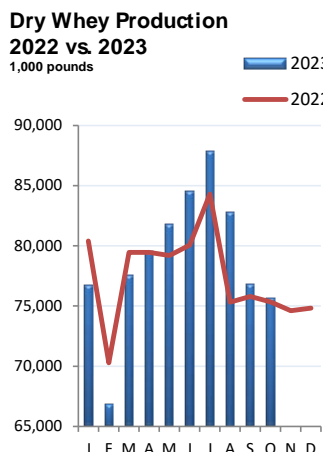
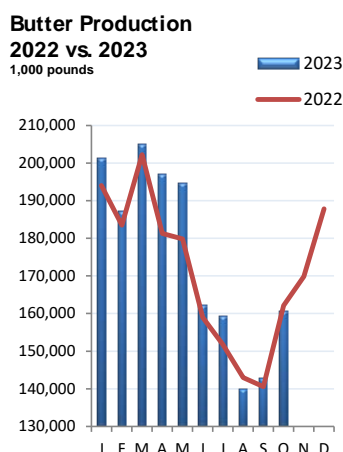
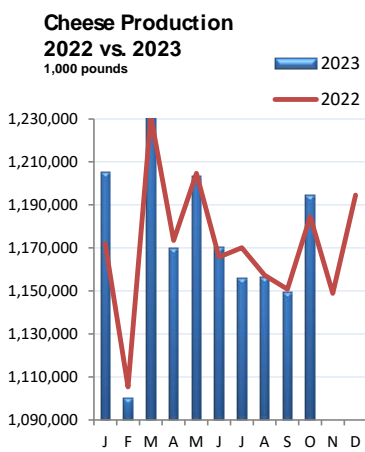
Yogurt & Other Dairy Products

Output of yogurt, plain and flavored, totaled 386.5 million pounds, down 1.3 percent from October 2022. Output during the first 10 months totaled 4.03 billion pounds, up 3.1 percent from the first 10 months of 2022.

Sour cream production during October totaled 138.7 million pounds, up 5.8 percent from October 2022. Sour cream output during the January-October period totaled 1.23 billion pounds, up 0.5 percent from a year earlier.

Cream cottage cheese production during October totaled 30.2 million pounds, up 8.6 percent from October 2022. Lowfat cottage cheese output during October totaled 29.0 million pounds, up 21.1 percent from a year earlier.

Production of regular ice cream during October totaled 57.9 million gallons, down 2.6 percent from October 2022. Lowfat ice cream output during October totaled 32.8 million gallons, down 8.1 percent from a year earlier.



FDA Rolls Out New Tools, FAQs For Traceability Rule

Rockville, MD—The US Food and Drug Administration recently rolled out new tools and FAQs (Frequently Asked Questions) to inform stakeholders about the food traceability rule and help covered entities come into compliance.

The food traceability rule is designed to facilitate faster identification and rapid removal of potentially contaminated food from the market. Foods subject to the final rule's requirements appear on the Food Traceability List (FTL), and include numerous cheeses, including soft unripened/fresh soft cheeses, soft ripened/semi-soft cheeses, and all cheeses made with unpasteurized milk, other than hard cheeses.

The compliance date for all persons subject to the food traceability rule is Jan. 20, 2026. FDA announced in September that routine inspections under the rule won't begin until 2027, to give covered entities additional time to work together and ensure that traceability information is being maintained and shared within supply chains per the requirements of the rule.

Featured in FDA's latest update on the food traceability rule are, among other things:

- New webpage about traceability lot codes, including examples of how Key Data Elements (KDEs) could appear on invoices and bills of lading.

- Video highlighting some technological components of product tracing systems.

- Examples of a traceability plan.

- New Frequently Asked Questions (FAQs).

- Information on how to apply for a waiver or exemption, if eligible.

- New supply chain examples for deli salads.

These featured tools are accessible from the FDA's traceability webpage, along with: supply chain examples for different commodities; fact sheets; a guide to "Getting Started with the Food Traceability Rule"; translations of the codified portion of the rule as well as many of the supporting materials and tools; an interactive tool that explains Critical Tracking Events and Key Data Elements; an interactive tool that identifies partial and full exemptions to the rule; and FAQs.

One of the supply chain examples provided on FDA's food traceability website is for a soft cheese. The example walks through the Critical Tracking Events in this supply chain where Key Data Elements are required.

USDA, FDA, EPA Release Draft Strategy To Reduce Food Loss, Waste

Washington—The US Department of Agriculture (USDA), Environmental Protection Agency (EPA) and Food and Drug Administration (FDA) last Saturday published for public comment the *Draft National Strategy for Reducing Food Loss and Waste and Recycling Organics*.

The strategy outlines targeted actions by the three agencies to prevent food loss and waste in order to mitigate the environmental repercussions of wasted food, including its impact on climate.

Four objectives are proposed in the draft strategy:

Prevent food loss where possible. Opportunities to reduce loss at the production and distribution stages of the chain can lead to greater economic returns for producers, manufacturers and distributors.

Strategic actions in this area include: optimize the harvest or collection of raw commodities and foods; and reduce food loss in food manufacturing/processing, storage and distribution. The latter can be achieved by optimizing handling, routing and storage; improving transportation, inventory and supply chain management with best practices; and upcycling food ingredients or products and processing byproducts into new foods for human consumption and creating animal food with remaining food.

Prevent food waste where possible. Food waste from consumers and consumer-facing businesses (retail and foodservice), which comprises roughly half of US food loss and waste, carries larger environmental and economic costs than food losses upstream (i.e., on-farm or within food pro-

cessing and distribution), since costs accumulate as food is wasted further down the supply chain.

Strategic actions in this area include: develop, launch and run a national consumer education and behavior change campaign; educate children and youth about strategies to reduce food waste; partner with the private sector to find upstream solutions to consumer food waste; facilitate and incentivize food donations to improve access to healthy and affordable food; research and identify and address unique drivers of US food loss and waste and the incentives to reduce it; invest in behavioral science to determine the most effective strategies to change household behaviors related to food waste; test new approaches in the US and abroad, identify technology-based solutions, and facilitate sharing of best practices to reduce food loss and waste among retailers, manufacturers and foodservice providers, including in their supply chains; and participate in internal forums to share best practices, data and tools.

Increase the recycling rate for all organic waste. Recycling organic waste offers the opportunity to recover valuable resources, such as nutrients and energy, and create healthy soils, in a way that also promotes environmental justice.

Strategic actions in this area include: support the development of additional organics recycling infrastructure through grants and other assistance for all communities, especially those that are underserved; expand the market for products made from recycled organic waste; enhance support

to advance de-centralized (i.e., community-scale and home composting) organics recycling; build, refine, and share tools and data to aid decision-making about infrastructure investments, waste management policies, and waste management pathway destinations (e.g., anaerobic digestion, composting, landfill); and address contamination in the organic waste recycling stream.

Support policies that incentivize and encourage food loss and waste prevention and organics recycling. Policies that incentivize and encourage the prevention of food loss and waste, redistribution of surplus food, development of additional organics recycling infrastructure, and expansion of markets for recycled products made from organics and soil amendments made from food and other organic waste, at all levels of government, can help the US meet its national food loss and waste reduction goal and national recycling goal.

Strategic actions in this area include: support international policymakers aiming to build more circular economies; and support tribal, territory, state, and local policymakers aiming to build more circular economies.

"Food loss and waste poses a real challenge to agriculture, food and the climate. In order to tackle this problem, and in turn build a resilient food system and mitigate climate impacts, we must explore and implement innovative solutions," said US Secretary of Agriculture Tom Vilsack. "This joint effort between USDA, EPA, and FDA will enhance interagency coordination and represents a vital step towards preventing food loss and waste, increasing organic waste recycling, and promoting economic opportunity."

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Michelle Farner Joins Vivolac Culture Technical Service, Sales Team

Greenfield, IN—Vivolac Culture Corporation has added Michelle Farner to the company’s technical service and sales team.

Farner, a licensed Wisconsin cheese maker, brings over 20 years of experience to her new position on the Vivolac team. She most recently served as manager of the University of Wisconsin-River Falls dairy plant.

Farner was responsible for all aspects of the processing facility, as well as the implementation and delivery of the dairy processing short courses. She was also instrumental in the construction and unveiling of the newly-renovated dairy pilot plant and its success.

“Michelle adds a lot of experience to our team and affirms Vivolac’s commitment to matching the highest quality dairy ingredients with the number one sales and technical service team in the industry,” said Aaron Miller, Vivolac’s director of sales and technical service.

“This is another exciting challenge,” Farner said. “It offers me the ability to continue and improve my knowledge in the dairy industry.”

“I look forward to working with the best dairy support staff in the world, introducing solutions wherever we can, and to better assist our customers in cost, quality, and functionality,” she said.

Miller explained that the hiring is a perfect fit for the company, and the timing couldn’t be better.

“Michelle and her family were relocating to North Carolina, and we were looking to add support to that region because of Vivolac’s continued growth there,” he said.

“While she will be based in North Carolina, her technical knowledge – particularly in grade A products – will be utilized to help our customers in their everyday production and business decisions throughout the US,” Miller said.

“Because of her background as an instructor at UW-River Falls and dairy processing short courses, Michelle is uniquely qualified to support Vivolac products with technical service,” Miller continued. “Vivolac can continue offering products that add value to our customers, through our ability to supply the dairy markets with quality, US-made products.”

PERSONNEL

Darigold CEO Joe Coote To Leave Company; Huttema Named Interim CEO

Seattle, WA— Joe Coote, CEO of Darigold, Inc., announced plans to leave the company and return to his native Australia.

In his absence, Darigold board chairman Allan Huttema has been named interim CEO, effective immediately.

Coote joined Darigold three years ago as president of its International Ingredients division, before being promoted to CEO in 2022. He’d spent 12 years prior working globally in the dairy sector.

Huttema has served on Darigold’s board of directors for nine years, and has held the role of board chairman for the last three years.

Darigold has taken recent steps to strengthen its leadership team, naming consumer packaged goods leader Dan Hofmeister as president of the company’s Business-to-Consumer.

Dairy sector veteran Chris Rowe will lead Darigold’s Business-to-Business division as president, and named Dan Bukowski as a new senior vice president of sales.

TOBIAS WETZEL will return to KHS Group as the company’s new head of sales and service, effective Jan. 1, 2024. Wetzel previously held several managerial positions at KHS between 2011 and 2020, most recently as head of its Service Division. He joins CEO KAI ACKER; MARTIN RESCH, chief financial officer; and BEATE SCHÄFER chief human resource officer, to complete the KHS executive management board.

JAKE PARR has been promoted to the position of senior national account executive at Food Safety Net Services. Parr will be responsible for managing and developing client relationships, engagement and satisfaction, optimizing revenue growth, pipeline development and forecast strategy at the national

ASSOCIATION NOTES

ID Milk Processors Association (IMPA) Appoints First-Ever Executive Director

Twin Falls, ID—The Idaho Milk Processors Association (IMPA) has announced the appointment of Travis Jones as its first executive director, effective Jan. 1, 2024.

This historic appointment marks a significant milestone in IMPA’s 95-year history, underlining its commitment to innovation and leadership in the dairy industry, the association mentioned.

Jones has extensive experience in agriculture, public policy, and strategic planning, IMPA noted. His career includes roles such as chairing the University of Idaho’s College of Agriculture’s Dean’s Advisory Board, participating as a graduate of Leadership Idaho Agriculture’s class 28, and serving as an active member of the Food Producers of Idaho, which represents over 40 farm and commodity organizations and agribusinesses.

In his current role as a principal at Riley Stegner & Associates, Jones has been an advocate for Idaho’s natural resources and agricultural interests.

As IMPA’s executive director, Jones will report directly to Idaho Milk Processors Association’s board of directors, steering the association’s efforts both locally and nationally.

His responsibilities include implementing the board’s vision, planning the annual summer conference, and above all, nurturing and expanding IMPA’s regional membership.

“Idaho and Utah’s milk processing landscape is vibrant and full of potential. As a major milk-producing area, our processors supply the nation and the world with highly nutritious products,” said Shawn Burton, current IMPA president.

“Hiring an executive director demonstrates our committed confidence in achieving a stronger future for each member,” Burton added. “I see our region as a true leader in dairy, and in the face of rapid industry changes, Travis Jones is the ideal person to support our membership, helping them navigate change and innovate for the future.”

“The opportunity to work for and with Idaho’s dairy industry is both exciting and humbling. Idaho’s dairy farm families and milk products businesses are world-class, and I am eager to contribute to their continued success,” Jones commented.

OBITUARIES

Betty Babler, 65, owner and operator of Wisconsin’s Cascade Cheese Company, passed away Friday, Nov. 24, 2023 at Froedert Hospital in Milwaukee, WI. Betty and her husband, Keith Babler, took over the Cascade Cheese Company in 1985. She was still actively involved with the company until her passing.



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Vilsack Urged To Extend Support To Organic Dairy Farmers Using ODMAP Funds

Washington—A bipartisan group of House and Senate members this week asked US Secretary of Agriculture Tom Vilsack to support organic dairy farmers as they continue to face environmental and economic challenges.

In their letter to Vilsack, the House and Senate members applauded USDA's dedication of \$104 million to assist organic dairy producers through the new Organic Dairy Marketing Assistance Program (ODMAP) and said they "appreciate that nearly \$20 million has been distributed to organic producers so far."

However, "conditions in organic dairy remain challenging with drought determinations in many organic dairy regions as well as acute flooding that devastated crop production," the letter stated. "We continue to hear from the organic industry and their partners that the on-the-farm strain of today is difficult and the initial ODMAP payments, while necessary, didn't adequately reflect the cost dynamics in organic dairy."

"Many organic dairies continue to be unable to utilize cash flow for basic inputs like grain and the routine maintenance of equipment and facilities," the letter continued. "This has caused many to either drain what personal savings they have to stay in business or to exit the industry altogether."

"Given these realities, we urge you to take all necessary steps, this calendar year, to collaborate with organic dairy stakeholders to extend support to additional organic dairy farmers using the remaining ODMAP funds," the letter said. "Our understanding is that ODMAP has nearly \$83 million in remaining, unspent funds," which should be used to continue to support organic dairy farmers.

Whether it's updating the calculations for the ODMAP payment rate, starting a sign-up for another year's projected future marketing costs, or some other mechanism to improve coverage results, the remaining funds dedicated for ODMAP "should be distributed promptly," the letter added.

Oct. Dairy Trade

(Continued from p. 1)

down 1 percent; Dominican Republic, 21.2 million pounds, up 2 percent; Panama, 19.0 million pounds, down 28 percent; and Saudi Arabia, 17.0 million pounds, down 29 percent.

Nonfat dry milk exports during October totaled 142.2 million pounds, down 11 percent from October 2022. NDM exports during the first 10 months of 2023 totaled 1.49 billion pounds, down 3 percent from the first 10 months of 2022.

October exports of dry whey totaled 31.8 million pounds, down 38 percent from October 2022. Dry whey exports during the January-October period totaled 330.9 million pounds, down 20 percent from a year earlier.

Whey protein concentrate exports during October totaled 29.4 million pounds, up 10 percent from October 2022. WPC exports during the first 10 months of this year totaled 266.0 million pounds, down 18 percent from the first 10 months of last year.

Lactose exports during October totaled 91.5 million pounds, up 20 percent from October 2022. During the January-October period, lactose exports totaled 879.7 million pounds, up 7 percent from the same period in 2022.

Butter exports during October totaled 4.3 million pounds, down 72 percent from October 2022. Butter exports during the first 10 months of 2023 totaled 59.1 million pounds, down 50 percent from the first 10 months of 2022.

October ice cream exports totaled 10.2 million pounds, down 2 percent from October 2022. Ice cream exports during the January-October period totaled 125.3 million pounds, down 8 percent from a year earlier.

Yogurt exports during October totaled 3.6 million pounds, up 26 percent from October 2022. Yogurt exports during the first 10 months of this year totaled 36.9 million pounds, up 6 percent from the first 10 months of last year.

Cheese Imports Increase

During October, US cheese imports totaled 43.7 million pounds, up 9 percent from October 2022. That's the highest monthly cheese import volume since December 2016, when the volume totaled 46.3 million pounds.

October's cheese imports were valued at \$186.5 million, up 20 percent from October 2022.

Cheese imports during the first 10 months of 2023 totaled 346.2 million pounds, up 1 percent from the first 10 months of 2022. The value of those imports, \$1.44 billion, was up 12 percent.

Leading sources of US cheese imports during the first 10 months of 2023, on a volume basis, with comparisons to the first 10 months of 2022, were:

Italy: 67.7 million pounds, down 3 percent.

France: 36.0 million pounds, down 14 percent.

Netherlands: 32.5 million pounds, up 6 percent.

Spain: 28.2 million pounds, up 59 percent.

Nicaragua: 17.1 million pounds up 35 percent.

Switzerland: 16.5 million pounds, down 3 percent.

United Kingdom: 15.9 million pounds, up 6 percent.

Ireland: 15.7 million pounds, down 8 percent.

Canada: 13.5 million pounds, up 20 percent.

Greece: 13.2 million pounds, up 4 percent.

Germany: 12.4 million pounds, up 11 percent.

Mexico: 12.3 million pounds, down 1 percent.

Butter Imports Decline

October imports of butter and other milkfat-containing products totaled 14.3 million pounds, down 10 percent from October 2022. Butter imports during the month totaled 10.9 million pounds, down 3 percent.

Imports of butter and other milkfat-containing products dur-

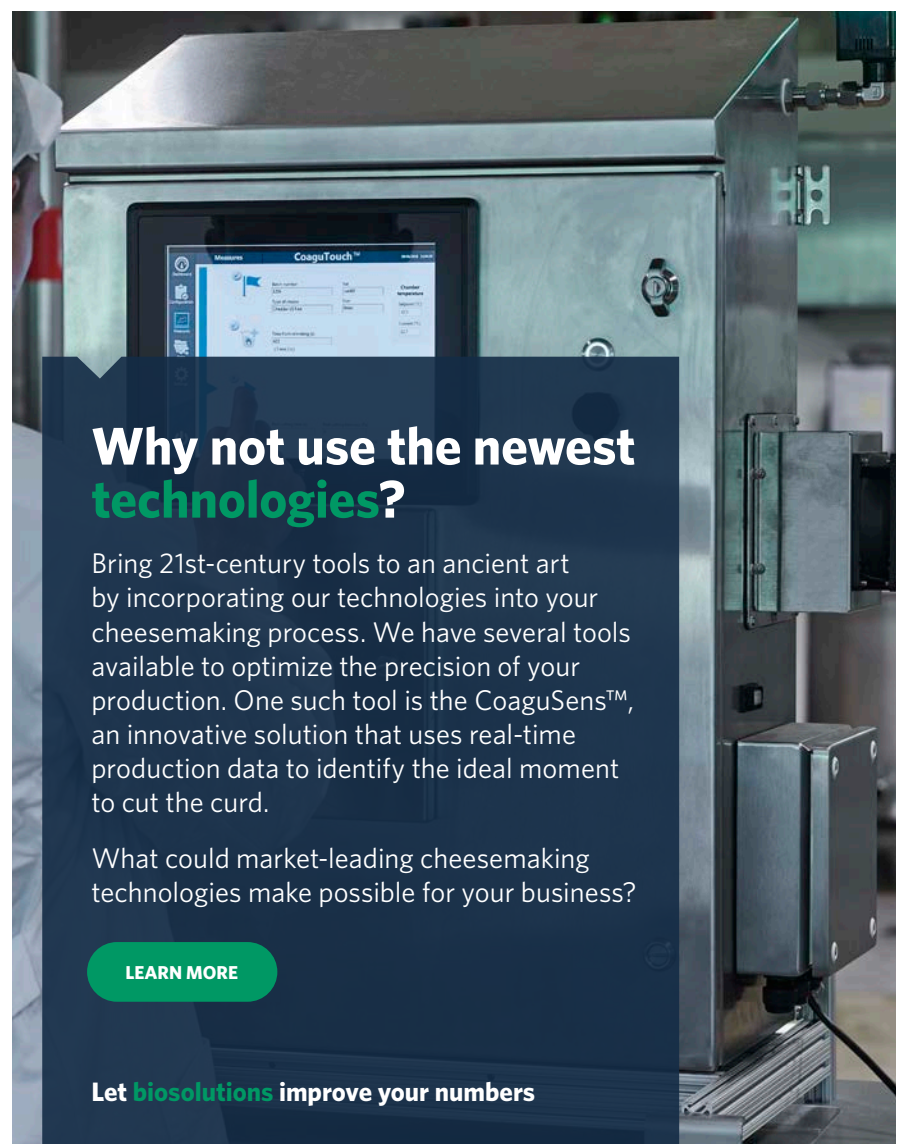
ing the first 10 months of 2023 totaled 132.2 million pounds, up 7 percent from the first 10 months of 2022. Butter imports during this period totaled 96.4 million pounds, up 10 percent from a year earlier.

Casein imports during October totaled 5.5 million pounds, down 53 percent from October 2022. Casein imports during the January-October period totaled 54.6 million pounds, down 41 percent from the same period last year.

October imports of caseinates totaled 4.4 million pounds, down 19 percent from October 2022. Imports of caseinates during the first 10 months of 2023 totaled 57.6 million pounds, up 34 percent from the first 10 months of 2022.

Imports of Chapter 4 milk protein concentrates during October totaled 2.4 million pounds, down 42 percent from October 2022. During the January-October period, imports of Chapter 4 MPCs totaled 65.9 million pounds, up 2 percent from the same period last year.

October imports of Chapter 35 milk protein concentrates totaled 3.1 million pounds, down 48 percent from October 2022. Imports of Chapter 35 MPCs during the first 10 months of 2023 totaled 41.8 million pounds, up 33 percent from the first 10 months of 2022.



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PCC-DBII Awards \$521,764 In Grants To Dairy Companies In CA, OR, WA

Fresno, CA—The Pacific Coast Coalition-Dairy Business Innovation Initiative (PCC-DBII) has awarded \$521,764 in grant funding to 12 dairy companies in California, Oregon and Washington.

Each awardee is receiving up to \$50,000, depending on their submitted budget. The awards are all for equipment-related investments.

Grouped by state, grant award-ees are as follows:

California: Foggy Bottoms Boys, Ferndale; Nicasio Valley Cheese, Nicasio; Petit Pot, Emeryville; Point Reyes Farmstead Cheese Co., Point Reyes; Shooting Star Creamery, Paso Robles; Stepladder Creamery, Cambria; and Valley Ford Cheese & Creamery, Valley Ford.

Oregon: Nico's Ice Cream, Portland; Rising Sun Dairy, Turner; Rose Valley Creamery, Tillamook; and Ruby Jewel Company, Portland.

Washington: Chimacum Valley Dairy, Chimacum.

Grant winners intend to purchase items such as an ice cream machine, milk cooling transport tank, milk analyzer and homogenizer, pasteurizers and cheese cutting machines.

These equipment purchases will, according to the PCC-DBII: save time and energy; create new value-added products to meet evolving consumer trends; increase the operational efficiency of the cheese aging process; allow for quick analysis of A2/A2 milk components; optimize processes to spike production capacity; broaden geo-

graphic scope of markets; add new employment positions; and reduce waste and minimize environmental impact.

“Those selected for awards range from 98-year old multi-generational legacies looking to diversify their line, to two-year-old BIPOC-owned start-ups with their sights on the nation's biggest grocery stores. Not only will these grants help businesses optimize their processes and innovate their products, but the West Coast region is building a stronger dairy presence.” said PCC-DBII project director Carmen Licon Cano, Ph.D., who is the associate director of the Institute for Food and Agriculture.

“Not only will these grants help businesses optimize their processes and innovate their products, but the West Coast region is building a stronger dairy presence.”

Carmen Licon Cano, Ph.D.,
Pacific Coast Coalition-Dairy
Business Innovation Initiative

“Each grant will result in time-saving equipment that develops new offerings, creates jobs and increases profitability,” Licon added.

“By investing in new and existing products, the PCC-DBII awarded grants facilitate entrepreneurship and increase the availability of innovative cheese,

butter, yogurt and ice cream products both regionally and nationally,” said Dr. Susan Pheasant, director of the Institute for Food and Agriculture and “cowkeeper” for the PCC-DBII. “These grant winners are driving economic sustainability and growth through their high-quality dairy foods.”

“Washington state is known for producing a diverse portfolio of high-quality, safe agricultural products. Our dairies are an integral part of this success, said Derek Sandison, director of the Washington State Department of Agriculture.

“I'm pleased Chimacum Valley Dairy is a Pacific Coast Coalition-Dairy Business Innovation Initiative grant recipient,” Sandison continued. “The grant will create opportunities for them to not only continue producing top-tier products but also modernize their equipment to make their operation more efficient.”

“The Dairy Business Innovation Initiatives have made significant impacts to the dairy industry and the agricultural economy as a whole,” said Jenny Lester Moffitt, USDA under secretary for marketing and regulatory programs. “This funding will allow the Pacific Coast Coalition-Dairy Business Innovation Initiative to continue to develop critical relationships with California, Oregon and Washington dairy producers and processors to support their on-the-ground needs.”

Recently receiving an additional \$1.8 million to support the resilience and viability of the Pacific Coast's dairy industry, the PCC-DBII is funded through USDA's Agricultural Marketing Service and hosted by California State University, Fresno. The initiative is in collaboration with Cal Poly Humboldt, Cal Poly San Luis Obispo, Chapman University, Chico State, Oregon State University, Oregon Dairy and Nutrition Council, UC Davis, Washington State University, and the California Dairy Innovation Center.

This is the third round of grant funding through the PCC-DBII. Via three rounds of funding, PCC-DBII has made nearly \$5 million in grants available to regional dairy businesses for innovation-related investments, helping dairy processors evolve their operations and adopt more sustainable practices.

A larger funding opportunity, the fourth round of grant awards by the PCC-DBII, will open on Jan. 2, 2024, with at least \$4.1 million available for more states: Arizona; California; Nevada; New Mexico; Oregon; and, Washington.

Applications will be accepted through Feb. 29, 2024.

For more information, visit www.dairyppc.net/

Rogue River Blue Yeast & Flora Used In Lambic-Style Ale

Central Point, OR—A new, limited-edition ale made with natural flora from Rogue Creamery's iconic Rogue River Blue was released last week.

A partnership between iconic Oregon businesses Crux Fermentation Project and Rogue Creamery resulted in Crux's newest release – Coolship #6.

Two years ago, Crux Fermentation, a craft brewery in Bend, OR, invited Rogue Creamery to take part in the sixth rendition of Crux's “Coolship” fermentation program.

The brewers and cheese makers devised a plan to brew beer inoculated with Rogue River Blue. Last month, that creation was released to the public.

The “Coolship” is a trailer-like portable tank that can be driven anywhere, allowing the Crux team to brew beer on the road, in the open air, embracing the natural flora occurring in various locations.

Previous experimental beers made with the Coolship have taken place all over Central Oregon. After filling their Coolship portable vat with nonnucleated beer wort, the Crux team drove the Coolship 200 miles to Rogue Creamery in January 2022.

They added Rogue River Blue cheese to the beer wort and let it sit overnight inside Rogue's facility as the yeast and flora in both the cheese and aging environment “worked its magic.”

The Coolship returned to its brewing facility in Bend, where the beer aged in oak barrels for almost two years.

“What a fun project and partnership this has been,” said Rogue Creamery retail manager Tom VanVoorhees. “We've been eagerly awaiting the moment when we can release this beer for nearly two years, so we're delighted to have it available in bottle and on tap just in time for the holiday season.”

“Beer and cheese are a natural pair, and this Rogue Creamery Crux Coolship made with their iconic Blue cheese is no exception,” said Crux founder Larry Sidor. “The Crux Coolship project is all about experimentation with wild yeasts and unique ingredients – don't let the Blue cheese scare you away from this slightly sweet and oaky lambic ale that is the perfect pair with your holiday roast.”

Coolship #6 isn't sold in stores, but is available for purchase at Crux Fermentation Project locations and Rogue Creamery.



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Price Forecasts

(Continued from p. 1)

milk cow numbers and reduced milk per cow.

The fat basis dairy import forecast for 2023 is raised due to higher imports of cheese.

Skim solids imports are lowered due to fewer shipments of milk protein products.

The fat basis dairy export forecast is lowered due to lower butter exports, while the skim-solids export forecast is raised due to higher whey product shipments, which more than offset lower expected nonfat/skim powder, USDA reported.

For 2024, the dairy import forecast is raised on a fat basis, but lowered on a skim-solids basis. Fat basis exports are lowered for 2024 on lower expected butter shipments, while a higher skim-solids basis forecast reflects higher nonfat/skim powder and whey product exports.

For 2023, based on recent prices, cheese and butter price forecasts are lowered while the nonfat dry milk price is raised and the dry whey price is unchanged, USDA reported.

USDA's new 2023 price forecasts, with changes from last month's forecasts, are as follows: cheese, \$1.7650 per pound, down one-half cent; butter, \$2.6200 per pound, down 1.5 cents; nonfat dry milk, \$1.1850, up one-half cent; and dry whey, 36.0 cents per pound, unchanged.

Both the Class III and Class IV milk price forecasts are lowered from last month, to \$17.05 per hundredweight and \$19.10 per hundred, respectively, on the lower cheese and butter prices, USDA reported.

For 2024, the cheese price forecast is lowered by 10 cents from last month, to \$1.7250 per pound, while butter, nonfat dry milk and dry whey prices are all raised, to \$2.5950, \$1.1750 and 40.0 cents per pound, respectively.

The Class III Price forecast is lowered by 85 cents, to \$16.85 per hundred, due to lower cheese prices, while the Class IV price is raised by five cents per hundred, to \$18.90 per hundred, due to higher butter and NDM price forecasts.

The all milk price forecast for 2023 is lowered by 10 cents, to \$20.60 per hundred.

The all milk price forecast for 2024 is lowered by 55 cents, to \$20.25 per hundred, USDA announced.

This month's USDA season-average corn price received by producers is unchanged at \$4.85 per bushel.

The soybean meal price forecast is increased \$10.00 to \$390.00 per short ton.

Emmi Roth Opens New Headquarters, Conversion Facility In Stoughton, WI

Stoughton, WI—Emmi Roth last week officially opened the doors at its new headquarters in Stoughton, WI.

The new 158,000-square-foot building also houses Emmi Roth's new conversion facility, which will cup, bag, wedge, shred, and crumble the company's cheese products for a variety of brands.

Emmi Roth in 2021 acquired the Athenos business, including what is described as the number one Feta brand in the US, and with that acquisition came the need for more conversion and distribution capabilities, the company noted.

"After several years of planning and construction, we are happy to finally be up and running at our new home in Stoughton," said Tim Omer, Emmi Roth's president. "Our team has worked tirelessly over the past two years to make this dream a reality, which will significantly impact our busi-

ness and our ability to better serve our customers."

The facility enables Emmi Roth to control more of its supply chain and improves the US cheese industry's overall conversion landscape, the company said.

"With conversion now within our supply chain the new facility will drive for growth opportunities to our great portfolio of cheeses, strengthen our value add to customers, and increase our ability to service customers," said Jordan Ehlen, director of manufacturing at Emmi Roth.

The new facility has also become the single biggest sustainability project in Emmi Roth's history, allowing for a substantial reduction in the amount of fuel and emissions spent transporting cheeses, the company noted.

From a sustainability standpoint, the new facility means a: 49 percent reduction in transportation lanes, with 16 fewer lanes; 26 percent reduction in trips per year, or 1,407 fewer trips; and 44 percent reduction in kilometers/fuel/carbon dioxide, with 313,000 fewer kilometers, 113,075 fewer liters of fuel, and 402 fewer tons of carbon dioxide emissions

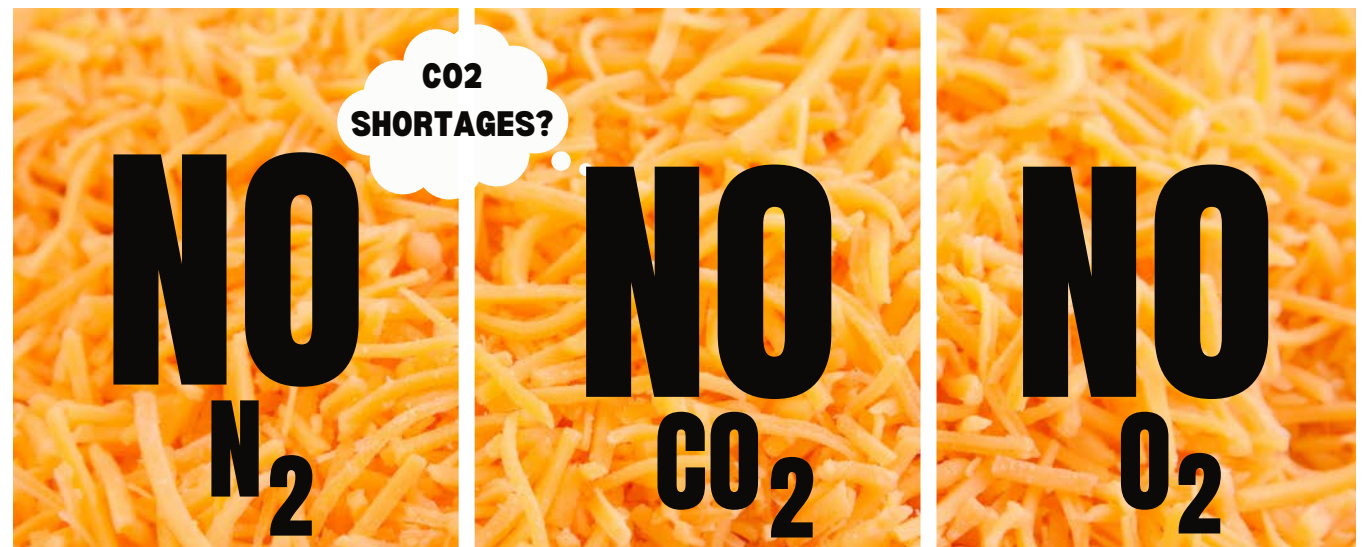
The facility is also all-electric, with no natural gas or propane service.

As the new headquarters location, the site will also be a win for current and future team members, according to the company. The facility is centrally located between Emmi Roth's three cheese plants in Wisconsin and will allow teams from different areas of the business to collaborate under one roof.

Conversion team members will feel the benefits of working in a new facility designed to minimize physical stress from lifting and bending and create the most efficient, effective workflows.

Employees have started arriving, and by February as many as 175 people will be working at the facility. Some 85 new Emmi Roth employees already have been hired and another 40 will join before February, adding about 125 new jobs to the Stoughton community.

"The startup of the new facility is in full swing," Ehlen said. "Our team is really engaged and has taken on the challenges of the new facility with great pride and perseverance."



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PLANNING GUIDE

Winter Fancy Food Show: Jan. 21-23, Las Vegas Convention Center. www.specialtyfood.com.

Dairy Forum 2024: Jan. 21-24, J.W. Marriott Phoenix Desert Ridge, www.idfa.org/dairy-forum.

World Championship Cheese Contest: March 5-7, Monona Terrace Convention Center, Madison. Visit www.worldchampioncheese.org for updates.

ADPI Global Ingredients Summit: March 11-13, 2024, Peppermill Resort, Reno. Visit www.adpi.org for information.

Cheese Expo: April 16-18, 2024, Baird Center, Milwaukee, WI. Registration now available online at www.cheeseexpo.org.

ADPI/ABI Joint Annual Conference: April 28-30, Sheraton Grand Chicago Riverwalk, Chicago, IL. For details, visit adpi.org/events for details.

American Cheese Society Annual Conference: July 10-13, Buffalo, NY. Visit www.cheesesociety.com.

IMPA Annual Meeting: Aug. 8-9, Sun Valley Resort, Sun Valley, ID. Visit www.impa.us for details closer to event date.

IDFA Ice Cream Technology, Cultured Dairy Conferences Set For April 9-10

Clearwater, FL—Discounted registration for the International Dairy Foods Association's (IDFA) co-located Ice Cream Technology Conference and Yogurt & Cultured Innovation Conference ends Dec. 15, 2023.

Both events will take place here April 9-10 at the Hilton Clearwater Beach Resort.

The Ice Cream Technology Conference is a premier event for ice cream and frozen dessert professionals, focusing on innovations in frozen dessert research, technology and market trends. It provides opportunities to learn from experts on issues like food safety, labeling and regulations.

It's designed for professionals involved in ice cream and frozen dessert technology, including plant managers, regulatory compliance personnel, research and development professionals, and quality assurance staff.

Suppliers to the ice cream industry are encouraged to attend.

Participants can share solutions for technical and practical processing issues through networking opportunities, hands-on sessions and product tasting, including the annual Innovative Ice Cream Flavor Competition.

The first part of the contest will give attendees the chance to judge for the Most Innovative Ice Cream Flavor and Most Innovative Ice Cream Novelty Product currently in the market.

The second part of the competition is devoted to the Prototype Ice Cream Flavor category. Attendees will evaluate new products not yet in the market.

Yogurt & Cultured Conference

The IDFA Yogurt & Cultured Innovation Conference will be held concurrently with the Ice Cream Technology Conference.

Speakers will cover the latest advances in cultures, ingredients, processing technology and packaging. All professions in the

yogurt and cultured dairy products field, including executives, marketers, plant operators, and quality assurance staff will benefit from the event.

Like the Ice Cream Conference, the Yogurt & Cultured Dairy meeting will also include an Innovative Product Contest. Dairy processors and flavor suppliers will be given the chance to showcase their latest cultured dairy products – cultured milk, yogurt, sour cream, Cottage cheese, dips and flavors.

All attendees are invited to submit one entry to compete in each of the two categories: Most Innovative Cultured Dairy Product and Most Innovative Cultured Dairy Prototype Flavor.

Registration for both events is now online, with discounted rates available through Dec. 15. Cost to attend prior to the deadline is \$1,200 for IDFA members and \$1,475 for non-members.

For full details and to sign up online, visit www.idfa.org/events.

New International Cheese & Dairy Expo Debuts June 26-28 In Staffordshire, UK

Stafford, UK—For the first time, the International Cheese & Dairy Awards (ICDA) has partnered with Dairy Industries Expo to launch one event – The 2024 International Cheese & Dairy Expo.

The co-located competition and dairy expo will take place here June 26-28 at the Staffordshire County Showground. It begins June 26 with a symposium and welcome dinner, followed by the Cheese & Dairy Expo, ICDA award presentation and networking lunch on June 27.

The Cheese & Dairy Expo will continue June 28, along with "Love Cheese Live."

The joint event will bring together producers, retailers, processing machinery and service representatives, packaging machines and material companies, turnkey suppliers, and personnel responsible for quality control and assurance, ingredients and logistics.

The 25th edition of ICDA will be held June 27 at Staffordshire County's Bingley Hall. The international cheese and dairy contest typically draws over 5,000 entries from around the world.

Love Cheese Live – one of the UK's largest cheese, food and beverage festivals – is set for June.

The two-day event provides attendees with cooking inspirations, shopping and product sampling. It also features a lineup of the best chefs and culinary experts using award-winning dairy brands, new flavors, and showcasing the latest artisan food trends.

Sponsorship options for all facets of the event include branding opportunities, advertising packages, keynote and Speakers' Stage sponsorships, and networking lunch support. Expo registration and exhibitor information is available online at www.internationalcheesedairyexpo.com.

PA Dairy Summit Feb. 7-8 Will Look At How Producers Address Retail Trends

Lancaster, PA—Agenda and registration information for the Pennsylvania Dairy Summit, scheduled for Feb. 7-8, 2024 at the Lancaster Wyndham Resort & Convention Center, was recently released.

Hosted by the Professional Dairy Managers of Pennsylvania and Center for Dairy Excellence, the two-day summit will include keynote presentations, breakout and discussion sessions and networking opportunities.

A breakout track will include sessions for dairy companies of all sizes, and will look cover issues like achieving low employee turnover, and navigating personality styles and generational differences.

A dairy producer panel will give an inside look at feed costs and conversion, along with the basics of understanding carbon credits, and how to take advantage of them. Sarah Moag and Rob Noble of seventh-generation Noblehurst Farms will lead a pre-

sentation on how to cultivate a multi-faceted family farm."

Roxi Beck from the Center for Food Integrity will give a talk entitled "Building Trust Inside & Outside the Farm Gate."

A panel discussion on innovating a producer-led marketplace will feature Ken Smith of Cool Lawn Farms; Jason Frye, Pleasant Lane Farms; and a representative from Cayuga Marketing.

Phil Plourd from *Ever.Ag.* will cover how to navigate shifting market dynamics.

Dairy Management, Inc. will talk about current retail trends, and how producers can best address them to keep dairy momentum strong amidst current economic headwinds.

Full registration for dairy producers is \$100 per person, and \$250 for non-producers.

For complete details on the dairy summit, visit www.padairy-summit.org.

CheeseExpo Early Registration Ends Jan. 30; Event Set For April 16-18

Milwaukee, WI—Discounted early registration for CheeseExpo 2024, set for April 16-18 at the Baird Center here, ends January 30.

The three-day expo is hosted by the Wisconsin Cheese Makers Association (WCMA) and Center for Dairy Research (CDR). Most attendees signing up prior to Jan. 30, 2024 will receive 20 percent off full, single-day, exhibits and networking events.

Roughly 4,000 visitors are slated to attend the educational and networking event.

The Collegiate Dairy Products Evaluation Contest will also be held on Wednesday of the expo.

Online registration is available at CheeseExpo.org. Questions can be directed to events@wischeesemakers.org.



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DAIRY PRODUCT MARKETS

AS REPORTED BY THE US DEPARTMENT OF AGRICULTURE

WHOLESALE CHEESE MARKETS

NATIONAL - DEC. 1: Milk volumes available for cheese processing are ample in the East. Plant managers relay production schedules are steady, though demand has plateaued. Retail demand is noted to be steady, but contacts noted foodservice demand continues to be lackluster. In the Central region, milk prices have bounced back from the Thanksgiving week, ranging from flat to \$1 over Class. Cheese demand is holding a steady pattern, and contacts share surplus loads of Cheddar are generally spoken for. Barrel quantities have increased. In the West, Class III demand is steady to stronger for cheese processing. Spot milk availability ranges from strong to abundant, though some plant managers relay cheese production schedules are below capacity. Retail cheese demand continues to outpace foodservice demand in the West.

NORTHEAST - DEC. 6: Contacts note milk demand is steady to stronger from Class III processors. Plant managers share cheese production schedules are robust, and that inventories remain strong. Cheese demand has picked up over the past several days, evidenced by market prices for cheese blocks on the CME closing at \$1.5200 last Friday and rising to \$1.6000 as of report publishing time. Retail demand is strong, but foodservice demand continues to weaken.

MIDWEST AREA - DEC. 6: Milk availability for cheese processors in the region shifted this week. Last week provided a brief rebound following Thanksgiving week pricing lows. While deals as low as \$4-under Class were reported this week, there are still some \$1-over Class prices reported, as well. Despite the milk availability growth this week, recent week's generally balanced milk supplies have cheesemakers reporting somewhat balanced cheese supplies. Cheddar and Italian style cheese makers say demand is holding somewhat steady in relation to this time of year. The nearing-culmination of football season typically bodes well for both Italian (pizza) cheese and some seasonal Cheddar varieties. Barrel processors report generally steady demand. Those contacts relayed few to no extra spot cheese has been available in recent weeks. Curd processors have reported shifting production into other varieties, as curd demand is seasonally quiet. Market tones are uncertain, despite the narrowing block/barrel price gap.

WEST - DEC. 6: In the West, retail demand is steady for varietal cheeses. Foodservice demand for varietal cheeses is steady to lighter as some stakeholders indicate orders are softer from foodservice avenue purchasers. Cheese makers relay comfortable inventories for the last month of the year and no shortages in spot load availability. Some stakeholders suggest that although the price competitiveness of domestic cheeses versus international cheeses has recently improved, it has not strengthened export demand. Manufacturers indicate milk is readily available, and demand for Class III milk is strong to steady. Manufacturers note mostly steady production schedules. Barrels have more bullish price movements compared to blocks on the CME over the last week.

FOREIGN-TYPE CHEESE - DEC. 6: Milk production is mixed in Europe, as some contacts note an uptick in farm level output this week. Despite this, stakeholders say output throughout November was below 2023 levels. Cheese makers report running below capacity as some say bad winter weather, in some parts of Europe, is having a negative impact on production. Some cheesemakers report tight milk volumes continue to prevent them from running at or near capacity. Cheese inventories remain tight in Europe, as production continues to lag demand. Contact report strong demand from foodservice and retail purchasers ahead of the year-end holidays. Export demand for cheese is steady. Industry sources indicate strong demand and tight inventories continue to contribute to bullish price movements for cheese in Europe.

EEX Weekly European Cheese Indices (WECI): Price Per/lb (US Converted)

Variety	Date: 12/6	11/29	Variety	Date: 12/6	11/29
Cheddar Curd	\$2.03	\$2.01	Mild Cheddar	\$2.03	\$2.01
Young Gouda	\$2.04	\$2.07	Mozzarella	\$1.85	\$1.86

WHOLESALE BUTTER MARKETS - DECEMBER 6

NATIONAL: Cream volumes are reportedly tighter in the eastern region compared to the central or western regions. Cream is indicated to be widely available in the central region, while processors in the southern part of the eastern region indicate not quite tight but not ample cream volumes. Butter production was mixed during the recent holiday weekend with some butter makers running busy production schedules and others slotting in some downtime. Plant managers relay strong to steady post-holiday weekend production schedules. Many manufacturers note comfortable December retail inventory levels. A few western butter makers relay availability of unsalted butter spot loads will be tight for the remainder of the year.

CENTRAL: Butter makers say cream remains somewhat available, but compared to the previous two weeks, loads are lightening up. Churning and micro-fixing rates are consistent with much of the past month. Despite the onslaught of cream volumes since the holiday week, churning rates have been kept in check by plant managers. They do report, however, that churning rates will likely kick up as the end-of-year holidays approach, and cream loads are expected to increase. Bulk butter remains somewhat available, but salted and unsalted varieties can range from one week to the next, from available to tight. Market tones are somewhat assured moving into the final trading weeks of the year.

NORTHEAST: Cream demand has picked up and supplies have not only tightened, but prices have moved higher. Butter contacts in the Northeast relay they are both churning and micro-fixing, and many report they are not buying spot loads of cream at the moment. Processors in the MidAtlantic and Southeast report they are opting to sell spot cream or are micro-fixing previously frozen inventory. Contacts note end of year retail butter orders have largely been fulfilled. Foodservice demand is noted to be steady to stronger than in recent weeks. Market tones are variable as evidenced by butter closing on the CME at \$2.5675 last Tuesday and increasing to \$2.6700 as of report publishing time.

WEST: Stakeholders report cream volumes and spot load availability have improved in the West. Some handlers note average butterfat levels in milk output have increased. This is contributing to stronger bulk butter production for butter makers. However, some stakeholders indicate bulk butter availability is tight, along with unsalted butter availability. Some butter manufacturers suggest both will remain on the tight end throughout this month. Plant managers report strong to steady retail production schedules. Most manufacturers report comfortable retail inventory levels for December. Domestic demand is strong to steady. However, a few butter makers suggest end of the year holiday season orders are peaking.

NATIONAL - CONVENTIONAL DAIRY PRODUCTS

Total conventional dairy ads decreased by 29 percent, while total organic dairy ads decreased by 77 percent. Ice cream in 48- to 64-ounce containers was the most advertised dairy product, with an average price of \$4.20, up from \$4.07 the week prior. Conventional butter in 1-pound packages had an average price of \$4.24, down from \$4.72 the week prior.

Total conventional cheese ad numbers decreased by 42 percent. Sliced cheese in 6- to 8-ounce packages was the most advertised conventional cheese item, with an average advertised price of \$2.79, up from \$2.56 last week. Sliced cheese in 6- to 8-ounce packages was the most advertised organic cheese product, with an average advertised price of \$3.14. Half-gallon containers of flavored organic milk were the most advertised organic dairy item. Organic half-gallon containers of milk had an average advertised price of \$4.62, up from \$4.26 last week, resulting in an organic premium of \$2.71.

RETAIL PRICES - CONVENTIONAL DAIRY - DECEMBER 8

Commodity	US	NE	SE	MID	SC	SW	NW
Butter 8 oz	3.04	2.00	3.47			3.59	
Butter 1#	4.24	3.55	4.58	3.05	3.63	4.59	4.29
Cheese 6-8 oz block	2.60	2.76	2.59	2.40	2.35	2.63	2.47
Cheese 6-8 oz shred	2.48	2.54	2.60	2.42	2.09	2.62	2.47
Cheese 6-8 oz sliced	2.79	2.69	3.03		2.72	2.60	2.55
Cheese 1# block	4.72	3.58	3.83		3.73	5.99	
Cheese 1# shred	4.36	3.00	4.90		3.86		
Cheese 2# block	6.28		5.99	5.99	7.41	6.17	5.99
Cheese 2# shred	6.65		7.31	6.80	6.20	6.13	5.99
Cottage Cheese 16 oz	2.59	3.03	2.61	2.50	3.99	2.21	
Cottage Cheese 24 oz	3.21	2.77	3.23		3.29		
Cream Cheese 8 oz	1.87	1.48	1.79	1.90	1.84	1.99	2.70
Egg Nog quart	3.20	3.99	2.98	3.49		4.85	
Egg Nog 1/2 gallon	4.89	5.81	5.00	3.99	5.29	3.99	3.99
Milk 1/2 gallon	1.91		1.66		1.82	2.80	1.63
Milk gallon	3.25	3.76	2.66	2.89	4.41	3.61	2.47
Ice Cream 14-16 oz	3.65	4.47	3.47	4.09	3.12	2.86	3.49
Ice Cream 48-64 oz	4.20	3.76	4.64	3.76	3.89	3.71	3.21
Flavored Milk gallon	2.93		1.66				3.99
Sour Cream 16 oz	2.16	2.06	2.18	2.47	2.23	2.10	2.19
Sour Cream 24 oz	3.74	4.00		3.99	3.39	3.83	
Yogurt (Greek) 4-6 oz	1.10	0.98	1.20	1.02	1.11	1.19	0.99
Yogurt (Greek) 32 oz	5.21	5.71	5.21	4.69	3.54		
Yogurt 4-6 oz	0.62	0.66	0.71	0.60	0.60	0.43	
Yogurt 32 oz	2.30	2.67	2.23		2.36	2.64	

ORGANIC DAIRY - RETAIL OVERVIEW

National Weighted Retail Avg Price:			
Butter 8 oz:		Sour Cream 16 oz:	\$3.99
Butter 1 lb:	\$5.98	Ice Cream 48-64 oz	
Cheese 6-8 oz shred:		Milk 1/2 gallon:	\$4.62
Cheese 6-8 oz block:	\$4.49	Milk gallon:	\$6.99
Cheese 6-8 oz sliced:	\$3.14	Flavored Milk 1/2 gallon:	\$4.88
Cream Cheese 8 oz:	\$3.32	Yogurt 4-6 oz:	
Cheese 2 lb shred:		Greek Yogurt 4-6 oz:	
Cottage Cheese 8 oz:		Yogurt 32 oz:	\$4.34
		Yogurt Greek 32 oz	\$7.19

DRY DAIRY PRODUCTS - DECEMBER 7

WPC CENTRAL/WEST: Demand for WPC 34% remains strong. Stakeholders say WPC 34% is a good value compared to alternative dairy proteins. This has contributed to persistent demand from animal feed end users. Spot inventories of WPC 34% are available but growing tighter. Stakeholders relay some preferred brands of WPC 34% are difficult to obtain. Markets for higher content whey protein concentrates and whey protein isolate remain bullish, due to strong demand and tight inventories. Plant managers say they are focusing their production schedules on these commodities, limiting WPC 34% production.

LACTOSE CENTRAL/WEST: Contacts say demand for lactose is mixed as some note a slight step back in interest from spot purchasers this week, while others note strong demand from contract purchasers. Manufacturers report they are securing contracts for lactose loads to deliver in Q1 of 2024, and some relay an uptick in interest for quarterly contracts from market participants compared to the current quarter.

DRY WHEY CENTRAL: Some processors say end-of-year interests from domestic customers have kept loads moving, while others simply say they are unable to offer any extra loads outside of contractual arrangements the rest of the year. Negotiations for Q1 continue to be worked through. Milk availability is seasonally increasing for Class III processing. Contacts are waiting to see if the availability is simply a holiday-related trend, or a longer-term situation, akin to last year at this time and early in the upcoming year. Still, as high protein whey complex markets continue to firm, more whey solids are going into whey protein concentrate 80% and whey protein isolate.

NDM WEST: Some Manufacturers note steady production of low/medium heat NDM. High heat NDM prices moved higher on the top end of the range. Stakeholders note steady demand. Some manufacturers relay steady production of high heat NDM, while others relay 2023 high heat NDM production is finished. Demand from international purchasers is moderate.

WEEKLY COLD STORAGE HOLDINGS

SELECTED STORAGE CENTERS IN 1,000 POUNDS - INCLUDING GOVERNMENT

DATE	BUTTER	CHEESE
12/04/23	32,541	82,190
12/01/23	32,368	82,019
Change	173	171
Percent Change	1	0

CME CASH PRICES - DECEMBER 4 - 8, 2023

Visit www.cheesereporter.com for daily prices

	500-LB CHEDDAR	40-LB CHEDDAR	AA BUTTER	GRADE A NFDM	DRY WHEY
MONDAY December 4	\$1.5350 (+1½)	\$1.5475 (+2¾)	\$2.6825 (+2¾)	\$1.1700 (-1)	\$0.4000 (NC)
TUESDAY December 5	\$1.6000 (+6½)	\$1.6000 (+5¼)	\$2.6700 (-1¼)	\$1.1650 (-½)	\$0.4000 (NC)
WEDNESDAY December 6	\$1.6100 (+1)	\$1.6350 (+3 ½)	\$2.6700 (NC)	\$1.1800 (+1½)	\$0.4025 (+¼)
THURSDAY December 7	\$1.5900 (-2)	\$1.6250 (-1)	\$2.6700 (NC)	\$1.1725 (-¾)	\$0.3950 (-¾)
FRIDAY December 8	\$1.5550 (-3½)	\$1.5800 (-4¼)	\$2.6700 (NC)	\$1.1650 (-¾)	\$0.3950 (NC)
Week's AVG \$ Change	\$1.5780 (+0.0955)	\$1.5975 (+0.0235)	\$2.6725 (+0.0725)	\$1.1705 (-0.0155)	\$0.3985 (+0.0005)
Last Week's AVG	\$1.4825	\$1.5740	\$2.6000	\$1.1860	\$0.3980
2022 AVG Same Week	\$1.9375	\$2.0925	\$2.8370	\$1.3720	\$0.4445

MARKET OPINION - CHEESE REPORTER

Cheese Comment: Three cars of blocks were sold Monday, the last at \$1.5475, which set the price. Two cars of blocks were sold Tuesday at \$1.6000, which set the price. On Wednesday, 3 cars of blocks were sold, the last at \$1.6350, which set the price. Two cars of blocks were sold Thursday, the last at \$1.6250, which set the price. Six cars of blocks were sold Friday, the 1st at \$1.5800, which set the price. The barrel price increased Monday on a sale at \$1.5350, rose Tuesday on a sale at \$1.6000, climbed Wednesday on an unfilled bid at \$1.6100, declined Thursday on a sale at \$1.5900, and fell Friday on a sale at \$1.5550.

Butter Comment: The price rose Monday on an unfilled bid at \$2.6825, then declined Tuesday on an uncovered offer at \$2.6700.

Nonfat Dry Milk Comment: The price declined Monday on a sale at \$1.1700, fell Tuesday on a sale at \$1.1650, increased Wednesday on a sale at \$1.1800, fell Thursday on an uncovered offer at \$1.1725, and declined Friday on an unfilled bid at \$1.1650 (following a sale at \$1.1600).

Dry Whey Comment: The price increased Wednesday on a sale at 40.25 cents, then fell Thursday on a sale at 39.50 cents,

WHEY MARKETS - DECEMBER 4 - 8, 2023

RELEASE DATE - DECEMBER 7, 2023

Animal Feed Whey—Central: Milk Replacer:		.2600 (+2) – .3300 (+1)
Buttermilk Powder:		
Central & East:	1.0500 (NC) – 1.1100 (NC)	West: 1.1200 (+2) – 1.2500 (NC)
Mostly:	1.1500 (+2) – 1.2100 (+2)	
Casein: Rennet:	3.2500 (+10) – 3.7500 (+10)	Acid: 3.4000 (+10) – 3.9000 (+20)
Dry Whey—Central (Edible):		
Nonhygroscopic:	.3700 (+2) – .4300 (NC)	Mostly: .3800 (NC) – .4200 (+1)
Dry Whey—West (Edible):		
Nonhygroscopic:	.3800 (+2) – .4800 (+2½)	Mostly: .4200 (+3) – .4600 (+3)
Dry Whey—NE:	.3700 (+¼) – .4425 (+½)	
Lactose—Central and West:		
Edible:	.1450 (-¾) – .3900 (-2)	Mostly: .2150 (+½) – .3200 (NC)
Nonfat Dry Milk —Central & East:		
Low/Medium Heat:	1.1500 (-1) – 1.2400 (NC)	Mostly: 1.1800 (-½) – 1.2200 (NC)
High Heat:	1.2900 (-1) – 1.3600 (NC)	
Nonfat Dry Milk —Western:		
Low/Med Heat:	1.1450 (+½) – 1.2600 (+1½)	Mostly: 1.1800 (NC) – 1.2200 (NC)
High Heat:	1.2850 (NC) – 1.4500 (+1¾)	
Whey Protein Concentrate—34% Protein:		
Central & West:	.8500 (NC) – 1.0950 (-2)	Mostly: .8800 (+1) – .9800 (+1)
Whole Milk:	1.8000 (+10) – 2.1800 (+18)	

Visit www.cheesereporter.com for historical dairy, cheese, butter, & whey prices

HISTORICAL CME AVG BLOCK CHEESE PRICES

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
'09	1.0883	1.2171	1.2455	1.2045	1.1394	1.1353	1.1516	1.3471	1.3294	1.4709	1.5788	1.6503
'10	1.4536	1.4526	1.2976	1.4182	1.4420	1.3961	1.5549	1.6367	1.7374	1.7246	1.4619	1.3807
'11	1.5140	1.9064	1.8125	1.6036	1.6858	2.0995	2.1150	1.9725	1.7561	1.7231	1.8716	1.6170
'12	1.5546	1.4793	1.5193	1.5039	1.5234	1.6313	1.6855	1.8262	1.9245	2.0757	1.9073	1.6619
'13	1.6965	1.6420	1.6240	1.8225	1.8052	1.7140	1.7074	1.7492	1.7956	1.8236	1.8478	1.9431
'14	2.2227	2.1945	2.3554	2.2439	2.0155	2.0237	1.9870	2.1820	2.3499	2.1932	1.9513	1.5938
'15	1.5218	1.5382	\$1.5549	1.5890	1.6308	1.7052	1.6659	1.7111	1.6605	1.6674	1.6175	1.4616
'16	1.4757	1.4744	1.4877	1.4194	1.3174	1.5005	1.6613	1.7826	1.6224	1.6035	1.8775	1.7335
'17	1.6866	1.6199	1.4342	1.4970	1.6264	1.6022	1.6586	1.6852	1.6370	1.7305	1.6590	1.4900
'18	1.4928	1.5157	1.5614	1.6062	1.6397	1.5617	1.5364	1.6341	1.6438	1.5874	1.3951	1.3764
'19	1.4087	1.5589	1.5908	1.6619	1.6799	1.7906	1.8180	1.8791	2.0395	2.0703	1.9664	1.8764
'20	1.9142	1.8343	1.7550	1.1019	1.6704	2.5620	2.6466	1.7730	2.3277	2.7103	2.0521	1.6249
'21	1.7470	1.5821	1.7362	1.7945	1.6778	1.4978	1.6370	1.7217	1.7601	1.7798	1.7408	1.8930
'22	1.9065	1.9379	2.1699	2.3399	2.3293	2.1902	2.0143	1.8104	1.9548	2.0260	2.1186	2.0860
'23	2.0024	1.8895	1.9372	1.7574	1.5719	1.4039	1.6209	1.9752	1.8549	1.7216	1.6279	

Restaurant Performance Index Fell 0.7% In Oct.; Sales, Traffic Declined

Washington—The National Restaurant Association's Restaurant Performance Index (RPI) stood at 99.7 in October, down 0.7 percent from September, the association reported recently.

The RPI is constructed so that the health of the restaurant industry is measured in relation to a neutral level of 100. Index values above 100 indicate that key industry indicators are in a period of expansion, while index values below 100 represent a period of contraction.

The RPI consists of two components: the Current Situation Index and the Expectations Index. The Current Situation Index, which measures current trends in four industry indicators (same-store sales, traffic, labor and capital expenditures), stood at 98.9 in October, down 1.9 percent from September.

Restaurant operators reported a net decline in same-store sales in October, though that was partially influenced by relatively strong comparisons in October 2022, the association noted. Some 31 percent of operators said their same-store sales rose between October 2022 and October 2023, down from 49 percent of operators who reported higher sales in Septem-

ber. And 51 percent of operators said their sales were lower in October, up from 36 percent who reported similarly in September.

Restaurant operators also reported a net decline in customer traffic in October for the seventh straight month.

The Expectations Index, which measures restaurant operators' six-month outlook for four industry indicators (same-store sales, employees, capital expenditures and business conditions), stood at 100.4 in October, up 0.4 percent from September.

Restaurant operators have a mixed outlook for sales in the coming months. Some 29 percent of operators expect their sales volume in six months to be higher than it was during the same period in the previous year, down from 33 percent who reported similarly in September. And 18 percent think their sales in six months will be lower than they were during the same period in the previous year, compared to 26 percent who reported similarly in September.

Restaurant operators are even less optimistic about the overall economy, the association said. Only 12 percent of operators said they expect economic conditions to improve in six months.

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