



CHEESE REPORTER

Vol. 148, No. 22 • November 10, 2023 • Madison, Wisconsin

US Dairy Exports Fell 25% In Sept.; Dairy Imports Declined 2%

September Cheese Exports Rose 4%, Cheese Imports Declined 2%; Casein Imports Fell 58%

Washington—US dairy exports during September were valued at \$596.9 million, down 25 percent from September 2022, according to figures released Tuesday by USDA's Foreign Agricultural Service (FAS).

That's the lowest monthly value for US dairy exports since January 2022, when the value was \$587.6 million.

During the first nine months of 2023, dairy exports were valued at \$6.15 billion, down 15 percent from the first nine months of 2022.

Leading markets for US dairy exports during the January-September 2023 period, on a value basis, with comparisons to the same period in 2022, were: Mexico, \$1.75 billion, down 3 percent; Canada, \$818.0 million, up 5 percent; China, \$475.6 million, down 20 percent; Japan, \$313.9 million, down 18 percent; Philippines, \$285.4 million, down 39 percent; Indonesia, \$259.3 million, down 25 percent; South Korea, \$243.0

million, down 46 percent; Australia, \$147.3 million, down 2 percent; Dominican Republic, \$107.0 million, down 12 percent; and Vietnam, \$104.7 million, down 40 percent.

US dairy imports during September were valued at \$382.3 million, down 2 percent from September 2022. Dairy imports during the first nine months of 2023 were valued at \$3.66 billion, up 10 percent from the first nine months of 2022.

Leading sources of US dairy imports during the January-September 2023 period, on a value basis, with comparisons to the same period in 2022, were: New Zealand, \$517.8 million, up 3 percent; Ireland, \$501.2 million, down 1 percent; Italy, \$379.9 million, up 1 percent; Canada, \$286.0 million, up 29 percent; France, \$248.2 million, up 6 percent; Mexico, \$217.5 million, up 16 percent; Netherlands, \$182.4 million, down 0.4 percent; Denmark, \$162.1 million, up 23 percent; Spain, \$144.0 mil-

lion, up 44 percent; and United Kingdom, \$124.2 million, up 58 percent.

US cheese exports during September totaled 81.1 million pounds, up 4 percent from September 2022.

The value of those exports, \$178.5 million, was down 6 percent.

Cheese exports during the first nine months of 2023 totaled 714.4 million pounds, down 5 percent from the first nine months of 2022. The value of those cheese exports, \$1.63 billion, was down 4 percent.

Leading markets for US cheese exports during the January-September 2023 period, on a volume basis, with comparisons to the same period in 2022, were: Mexico, 234.6 million pounds, up 14 percent; South Korea, 75.1 million pounds, down 43 percent; Japan, 71.7 million pounds, down 9 percent; Australia, 50.9 million pounds, up 17 percent; Canada, 31.5 million pounds, up 32 percent; Guatemala, 27.8 million pounds, up 48 percent; Chile,

• See **Sept. Dairy Trade**, p. 4

Cheese Production Rose 0.1% In Sept.; Cheddar Output Increased 3.1%, Mozz Output Fell

Washington—US cheese production during September totaled 1.15 billion pounds, up 0.1 percent from September 2022, USDA's National Agricultural Statistics Service (NASS) reported last Friday.

Cheese production during the first nine months of 2023 totaled 10.55 billion pounds, up 0.2 percent from the first nine months of 2022.

Regional cheese production in September, with comparisons to September 2022, was: Central, 553.2 million pounds, down 1.8 percent; West, 466.2 million pounds, up 3.0 percent; and Atlantic, 133.1 million pounds, down 1.3 percent.

September 2023 cheese production in the states broken out by NASS, with comparisons to September 2022, was: Wisconsin, 285.6 million pounds, down 2.5 percent; California, 202.9 million pounds, up 4.9; Idaho, 87.4 million pounds, up 0.9 percent; New Mexico, 85.3 million pounds, up 10.2 percent; New York, 67.8 million pounds, down 3.6 percent; Minnesota, 65.1 million pounds, up 0.7 percent; South Dakota, 42.9 million pounds, down 3.3 percent; Pennsylvania, 37.2 million pounds, up 1.8 percent; Iowa, 31.9 million pounds, up 1.0 per-

• See **Cheese Output Rises**, p. 6

USDA Lowers Milk Production Forecasts, Hikes Most Dairy Product Price Forecasts

Washington—The US Department of Agriculture (USDA), in its monthly supply-demand estimates released Thursday, lowered its milk production forecasts for both 2023 and 2024 and raised most of its dairy product price forecasts for both years.

The milk production forecast for 2023 is reduced by 500 million pounds from last month, to 227.1 billion pounds, as milk cow numbers were revised lower in the most recent "Milk Production" report, and the lower estimated numbers carried into the fourth-quarter forecast. Growth in milk

• See **Price Forecasts**, p. 9

Rising Demand For Full-Fat Dairy Means Butterfat Boom Will Continue

Denver, CO—With demand for products such as cheese, butter, cream and other full-fat dairy products expected to keep growing, the upward climb in butterfat levels in farm milk will continue to grow, according to a new report from coBank's Knowledge Exchange.

While record-high butter prices have been making headlines in the fall and early winter for back-to-back years, the butterfat story has been churning up positive momentum for over a decade, noted the report, "The Butterfat Boom Has Just Begun," which was written by Corey Geiger, lead dairy economist at CoBank.

That's because animal fats, in particular butterfat, are back in vogue from a dietary standpoint, it was noted.

This is taking place against the changing backdrop of nutritional research findings on cardiovascular disease and obesity, Geiger explained.

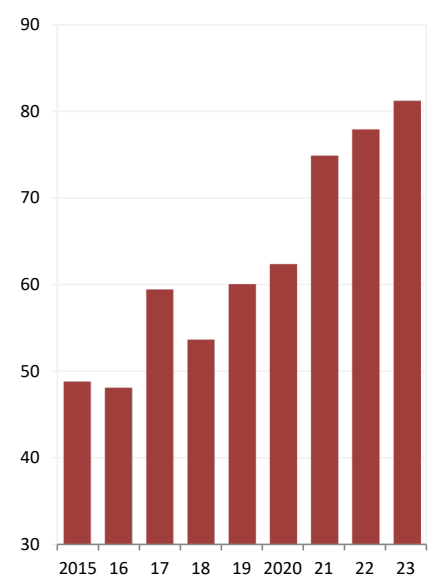
Time magazine captured this development on the cover of its Mar. 26, 1984 edition: "Cholesterol. And Now the Bad News..." it read.

Some 30 years later, *Time* declared "Eat Butter" on the cover of its June 23, 2014 edition. Butter, and its main ingredient, butterfat, was no longer a bad food, Geiger said.

By then, the dairy industry was already undergoing a metamorphosis, Geiger noted. Butterfat content in the national bulk tank had already begun a "monumental meteoric rise." Market

• See **Butterfat Boom**, p. 8

US Cheese Exports
Sept 2015 – 2023 millions of pounds





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25 Years Of A Daily Cash Cheese Market

This might come as somewhat of a surprise to some cheese industry veterans, but it's now been 25 years (plus a few weeks) since the industry's cash cheese market became a daily instead of a weekly event. That silver anniversary prompts us to take a trip back in time to briefly review how the industry's cash market has evolved.

Going back a bit over a century, the Wisconsin Cheese Exchange was formed in 1918. But the Wisconsin Cheese Exchange was actually preceded by other "exchanges," including the Plymouth Central Call Board of Trade and other so-called call boards.

Going even further back in history, it was to improve the position of the cheese factory operator that the so-called dairy boards were established, 1873 being the year in which they first made their appearance, according to an article written by Robert W. Leffler, president of the Wisconsin Cheese Exchange from 1941 to 1960. That article was published in the July 1954 edition of the *Journal of Dairy Science*.

Essentially, Leffler explained, a dairy board was no more than a marketplace where buyers and sellers of cheese might get together. The cheese maker had an opportunity to come into contact at a dairy board with more buyers than the limited number who might call at his factory, and buyers no longer had to travel from factory to factory in order to buy his cheese.

"For a while these boards attained considerable popularity. Over 50 were in existence at one time," Leffler noted.

As a side note, this publication started out in 1876 as a dairy-related section of *The Sheboygan County News*; the dairy news in those early issues mostly concerned local call board dairy trading, among other things.

The call boards were succeeded in 1918 (although at least one remained somewhat active for a couple more decades) by the Wisconsin Cheese Exchange, which was originally based in Plymouth, WI. That exchange moved to Green Bay, WI, in 1956, and changed its name to the National Cheese Exchange in 1975.

As Leffler explained, the Wisconsin Cheese Exchange (and later the NCE) met on Friday of each week. The trading session lasted for 30 minutes, with the presiding officer having the right to grant all necessary extensions of time, "a right which is frequently exercised."

That's an interesting observation, given how trading at the WCE and later the NCE evolved over the years. Specifically, during at least a couple of years in the early 1980s, there was no activity whatsoever at the NCE for weeks and months on end.

That point can be partially illustrated by the number of price changes on the NCE during some of those years. Specifically, in 1981, 1982 and 1983, there were all of four changes in the 40-pound block Cheddar price per year. A typical observation in the *Cheese Reporter's* "Market Opinion" back then was: "There was no trading activity today." Remember, that's when trading took place just once a week.

While a least part of the 1980s was uneventful at the NCE, things got mighty interesting in the 1990s. Things started to get interesting in March of 1996, when the University of Wisconsin-Madison and the Wisconsin Department of Agriculture, Trade and Consumer Protection released a very lengthy and detailed study of the NCE.

That study concluded, among other things, that NCE trading conduct during the 1988-1993 period "is consistent with the hypothesis that some leading

during at least a couple of years in the early 1980s, there was no activity whatsoever at the NCE for weeks and months on end.

traders are motivated primarily by a desire to influence NCE prices."

Two months later, two subcommittees of the House Agriculture Committee held a two-day hearing on that study as well as on possible alternatives to the NCE for price discovery for bulk cheese and milk.

In between that study being released and that hearing being held, Congress passed a farm bill that, among other things, mandated the reform of the federal milk marketing order program. At that time, NCE prices were being used to calculate the Basic Formula Price (predecessor to today's Class III price).

By early 1997, it became apparent that the NCE's days were numbered. A joint committee of the boards of the NCE and the National Cheese Institute was looking at an alternative cash market for the cheese industry.

In March of that year, a proposal from the Chicago Mercantile Exchange was accepted to create a new cash cheese market at the CME.

The NCE held its final trading session on Friday morning, April 25, 1997, in Green Bay. Six days later, on a Thursday afternoon, the CME launched its new cash cheese market.

That, as it turned out, is sort of a forgotten chapter in cash cheese trading: weekly trading that took place on Thursday afternoons. That's because, a year and a half later, on Sept. 1, 1998, the CME moved to daily trading for its cash cheese market.

So what can we learn from this brief history? If nothing else, we can safely conclude that cheese price volatility is here to stay: in the 2020s, there are times when cheese prices change more in a single week than they changed in an entire year back in the 1980s. Such is life with a 25-year-old daily cash market.

Global Dairy Trade Price Index Falls 0.7%; Majority Of Product Prices Rise

Auckland, New Zealand—The price index on this week's semi-monthly Global Dairy Trade (GDT) dairy commodity auction declined 0.7 percent from the previous auction, held three weeks ago.

That's the first decline in the Global Dairy Trade price index since the second auction in August.

In this week's auction, which featured 162 participating bidders and 114 winning bidders, prices were higher for Cheddar cheese, skim milk powder, anhydrous milkfat, lactose and buttermilk powder; and lower for butter and whole milk powder.

Results from this week's Global Dairy Trade auction, with comparisons to the GDT auction held three weeks ago, were as follows:

Cheddar cheese: The average winning price was \$4,042 per metric ton (\$1.83 per pound), up 4.5 percent. Average winning prices were: Contract 1 (December), \$4,100 per ton, up 8.3 percent; Contract 2 (January 2024), \$4,044 per ton, up 12.4 percent; Contract 3 (February), \$4,105 per ton, up 8.6 percent; Contract 4 (March), \$4,023 per ton, up 0.1 percent; Contract 5 (April), \$4,083 per ton, up 0.7 percent; and Contract 6 (May), \$3,809 per ton, down 11.2 percent.

Skim milk powder: The Global Dairy Trade average winning price was \$2,724 per ton (\$1.24 per pound), up 2.3 percent. Average winning prices were: Contract 1, \$2,811 per ton, up 6.9 percent; Contract 2, \$2,689 per ton, up 0.8 percent; Contract 3, \$2,711 per ton, up 2.5 percent; Contract 4, \$2,791 per ton, up 4.0 percent; and Contract 5, \$2,835 per ton, up 3.8 percent.

Whole milk powder: The average winning price was \$2,971 per ton (\$1.35 per pound), down 2.7 percent. Average winning prices were: Contract 1, \$2,956 per ton, down 3.0 percent; Contract 2, \$2,934 per ton, down 3.6 percent; Contract 3, \$2,988 per ton, down 2.6 percent; Contract 4, \$3,206 per ton, up 2.7 percent; and Contract 5, \$3,221 per ton, up 1.3 percent.

Butter: The average winning price was \$4,890 per ton (\$2.22 per pound), down 1.6 percent. Average winning prices were: Contract 1, \$5,245 per ton, up 5.7 percent; Contract 2, \$4,855 per ton, down 1.9 percent; Contract 3, \$4,855 per ton, down 1.0 percent; Contract 4, \$4,850 per ton, down 1.6 percent; Contract 5, \$4,885 per ton, down 1.5 percent; and Contract 6, \$4,890 per ton, down 2.2 percent.

Anhydrous milkfat: The average winning price was \$5,489 per ton (\$2.49 per pound), up 3.1 percent. Average winning prices were: Contract 1, \$5,717 per ton, up 10.2 percent; Contract 2, \$5,494 per ton, up 1.7 percent; Contract 3, \$5,444 per ton, up 1.1 percent; Contract 4, \$5,480 per ton, up 4.5 percent; Contract 5, \$5,465 per ton, up 5.8 percent; and Contract 6, \$5,556 per ton, up 7.5 percent.

Lactose: The average winning price was \$718 per ton (32.6 cents per pound), up 19.2 percent. That was for Contract 2.

Buttermilk powder: The average winning price was \$2,323 per ton (\$1.05 per pound), up 3.5 percent. Average winning prices were: Contract 1, \$2,370 per ton, up 1.1 percent; Contract 2, \$2,338 per ton, up 5.6 percent; Contract

3, \$2,295 per ton, up 2.5 percent; Contract 4, \$2,280 per ton, up 0.4 percent; and Contract 5, \$2,305 per ton, down 1.1 percent.

This week's decline in the GDT price index follows a run of four consecutive price increases, so in that sense, prices were due a breather, according to Nathan Penny, senior agri economist at Westpac.

During that period, whole milk powder prices had lifted by over 20 percent, albeit following a "very steep fall" in August.

After this week's decline in whole milk powder P prices, that lift moderates back to around 17 percent.

New Zealand spring milk production has started on a firm note, so that may also explain this week's Global Dairy Trade price decline, Penny noted.

September production was up 1.3 percent compared to September 2022.

Dairy markets previously had been factoring in drought risk on the back of the El Nino weather pattern, Penny pointed out.

In his view, this has been overdone as New Zealand water tables are generally very high and most farmers have ample feed on hand. This will help mitigate or dampen any drought impact.

Meanwhile, Chinese demand is hinting at a pickup, Penny continued.

Recent economic data have been more positive than expected, so this may translate into higher demand over time.

On balance, Westpac remains cautious. Westpac reaffirmed its milk price forecast for this season at \$7.25 per kilogram of milk solids.

Following this week's GDT auction, ASB Bank also retained its \$7.35 per kilogram of milk solids milk price forecast for the 2023/24 season.

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Sept. Dairy Trade

(Continued from p. 1)

20.7 million pounds, up 3 percent; China, 20.1 million pounds, up 157 percent; Dominican Republic, 19.1 million pounds, up 4 percent; Panama, 17.5 million pounds, down 27 percent; and Saudi Arabia, 15.3 million pounds, down 28 percent.

Nonfat dry milk exports totaled 117.4 million pounds, down 20 percent from September 2022. NDM exports during the first nine months of 2023 totaled 1.35 billion pounds, down 2 percent from the first nine months of 2022.

September dry whey exports totaled 34.2 million pounds, down 31 percent from September 2022. Dry whey exports during the January-September period totaled 299.1 million pounds, down 18 percent from a year earlier.

Whey protein concentrate exports totaled 23.9 million pounds, down 29 percent from September 2022. WPC exports during the first nine months of this year totaled 236.5 million pounds, down 20 percent from the first nine months of last year.

Lactose exports during September totaled 96.2 million pounds, up 4 percent from September 2022. Lactose exports during the January-September period totaled 788.2 million pounds, up 5 percent from the same period in 2022.

September butter exports totaled 4.6 million pounds, down 57 percent from September 2022. Butter exports during 2023's first nine months totaled 54.7 million pounds, down 46 percent from 2022's first nine months.

Ice cream exports during September totaled 11.0 million pounds, down 10 percent

from September 2022. Ice cream exports during the January-September period totaled 115.1 million pounds, down 9 percent from the same period last year.

Yogurt exports during September totaled 3.6 million pounds, down 4 percent from September 2022. Yogurt exports during the first nine months of this year totaled 33.3 million pounds, up 4 percent from the first nine months of last year.

Cheese Imports Decline

In September, US cheese imports totaled 37.6 million pounds, down 2 percent from September 2022. The value of those cheese imports, \$156.1 million, was up 11 percent.

Cheese imports during the first nine months of 2023 totaled 302.5 million pounds, up 0.05 percent from the first nine months of 2022. The value of those imports, \$1.25 billion, was up 11 percent.

Leading sources of US cheese imports during the first nine months of this year, on a volume basis, with comparisons to the first nine months of last year, were:

Italy: 59.3 million pounds, down 5 percent.

France: 30.8 million pounds, down 15 percent.

Netherlands: 28.1 million pounds, down 6 percent.

Spain: 25.6 million pounds, up 63 percent.

Nicaragua: 15.0 million pounds, up 36 percent.

Ireland: 13.64 million pounds, down 10 percent.

United Kingdom: 13.60 million pounds, up 4 percent.

Switzerland: 13.60 million pounds, down 6 percent.

Greece: 11.7 million pounds, up 3 percent.

Canada: 11.6 million pounds, up 21 percent.

Mexico: 10.95 million pounds, down 3 percent.

Germany: 10.5 million pounds, up 9 percent.

Butter Imports Rise

September imports of butter and other milkfat-containing products totaled 11.4 million pounds, down 2 percent from September 2022. Butter imports during September totaled 9.8 million pounds, up 5 percent from a year earlier.

During the January-September period, imports of butter and other milkfat-containing products totaled 117.9 million pounds, up 10 percent from a year earlier. Imports during this period totaled 85.6 million pounds, up 12 percent from the same period last year.

Casein imports totaled 3.2 million pounds, down 58 percent from September 2022. Casein imports during the first nine months of 2023 totaled 49.1 million pounds, down 39 percent from the first nine months of 2022.

Imports of caseinates totaled 5.1 million pounds, up 21 percent from September 2022. During the January-September period, imports of caseinates totaled 53.2 million pounds, up 41 percent from the same period in 2022.

Imports of Chapter 4 milk protein concentrates totaled 5.4 million pounds, up 88 percent from September 2022. Imports of Chapter 4 MPCs during the first nine months of this year totaled 63.5 million pounds, up 5 percent from the first nine months of last year.

September imports of Chapter 35 MPCs totaled 1.2 million pounds, down 68 percent from September 2022. Imports of Chapter 35 MPCs during the January-September period totaled 38.8 million pounds, up 51 percent from a year earlier.

FROM OUR ARCHIVES

50 YEARS AGO

Nov. 9, 1973: Oshkosh, WI—Members of the WCMA voted by resolution to actively seek the adoption of national milk grading, which would eliminate Grade A and B or “bottling” and “manufacturing” grades of milk. Members voted that all milk should be classed as either fit or unfit for human consumption in any form of dairy product.

Brooklyn, NY—Albert Pollio, 81, co-founder and president of Pollio Dairy Products Corporation, passed away Nov. 4. Albert's father Giuseppe Pollio first arrived in the US from Italy in the late 1890s, and in 1899, opened “Pollio Latticini” here in 1899 with his son. In 1938, the company changed its name to Pollio Dairy.

25 YEARS AGO

Nov. 13, 1998: Chicago—The Chicago Mercantile Exchange will add cash-settled dry whey and nonfat dry milk futures and options contracts to its lineup of dairy products beginning this week. For both contracts, specifications call for 44,000 pounds of product.

Le Sueur, MN—Davisco Foods International will open its first Latin American sales office in Mexico City early next year. Davisco will be the first US whey manufacturer to establish an office in Mexico.

10 YEARS AGO

Nov. 8, 2013: Sherry, WI—Biery Cheese of Louisville, OH, completed the acquisition of Kickapoo Valley Cheese (KVC) here this week. KVC, a second-generation, family-owned cheese conversion business, has begun operating under Biery Cheese Co.

Chicago—South Dakota State University again captured top team honors in the 92nd Collegiate Dairy Products Evaluation Contest. This year marked the sixth year in a row that South Dakota State captured the all-products title in the contest. As a result, SDSU coach Lloyd Metzger received the Aurelia & George Weigold Coach's Award. Clemson University, coached by John McGregor, took second place in all products.

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Bipartisan Senate Bill Would Create Food Loss And Waste Reduction Certification

Washington—US Sens. Dick Durbin (D-IL), co-chair of the Senate Hunger Caucus, and Chuck Grassley (R-IA) recently introduced the bipartisan Reduce Food Loss and Waste Act, which would establish a “Food Loss and Waste Reduction Certification.”

The legislation would direct the US Department of Agriculture (USDA) to create:

- Criteria, which businesses and organizations would have to meet to receive the certification;

- A verification process, to confirm that businesses and organizations have achieved the criteria; and

- A label, which certified businesses and organizations would be authorized to use on their products, buildings, and websites.

The “Food Loss and Waste Reduction Certification” would be similar to existing certifications, such as ENERGY STAR and the BioPreferred Program. The Reduce Food Loss and Waste Act would direct USDA to promote the certification to ensure that consumers are informed about which businesses and organizations have received it.

The Reduce Food Loss and Waste Act has garnered endorsements from the Consumer Brands Association, National Restaurant Association, FMI-The Food Industry Association, Natural Resources Defense Council, Harvard Food Law and Policy Clinic, and ReFED.

“Food loss and waste occurs at every stage of the supply chain and carries financial, environmental and social impacts that need to be addressed,” said Leslie G. Sarasin, FMI’s president and CEO. “The Reduce Food Loss and Waste Act represents a terrific opportunity to recognize everyone in the supply chain, including food manufacturers, wholesalers and retailers, that have taken steps to reduce food waste and encourage more companies to join these efforts.”

“While millions of Americans face food insecurity, millions of tons of food waste end up in landfills every year and contribute to methane emissions that drive the climate crisis,” Durbin said. “We must address these crises for the sake of hungry families, our economy, and our environment.”

“Our bill would help cut back on food waste by recognizing businesses for using excess food responsibly and incentivizing others to improve their practices,” Grassley said.

States Working To Overcome Shortage Of Paperboard Milk Cartons

Albany, NY, and Sacramento, CA—States including New York and California are working with the dairy industry and others to overcome a nationwide shortage of paperboard milk cartons.

The supply chain disruption has created a challenge for school milk packaging across the US as well as other institutions, according to the New York State Department of Agriculture and Markets (NYS AGM) and the New York State Department of Education (NYSED).

The two departments have been in contact with the state’s dairy processors and membership organizations to help develop short-term solutions for milk delivery and issued guidance to school food authorities (SFAs), while the state continues to gather information on the shortage.

NYS AGM is working to ensure New York dairy farmers have a market for their milk, and so is actively sharing information with the state’s milk processors to find alternative solutions to fill the demand for the packaging paperboard on a temporary, as-needed basis.

NYS AGM is also coordinating with the International Dairy Foods Association (IDFA), the Northeast Dairy Foods Association and the US Food and Drug Administration to find additional packaging that may be available and ways to escalate the approval of alternative packaging.

To assist the SFAs that cannot obtain milk in half pints for their school meals programs during this time, the NYSED has released temporary guidance. Although

schools are expected to meet the requirements to the greatest extent possible, the disruptions that limit milk variety or affect serving size are currently considered a temporary emergency condition.

Guidance by NYSED was sent to the school foodservice directors and managers last week, outlining steps that can be taken regarding the child nutrition program administration. SFAs are allowed to serve and claim meals during the emergency period by:

- Pouring milk from larger containers into individual cups;

- Offering one type of milk instead of a variety;

- Offering an alternate form of fluid milk, such as lowfat or fat-free lactose-free milk or reduced-lactose fluid milk; or

- As a last resort, not offer fluid milk at all.

The NYSED also advised that juice cannot be offered in place of the milk component. SFAs must still adhere to the National School Lunch Program and School Breakfast Program meal requirement that no more than half of the fruit or vegetable offerings may be in the form of juice.

SFAs are expected to maintain documentation of the milk disruption and the procedures implemented during the emergency.

“Our processor and supplier members are actively working to resolve the paperboard shortage issue by identifying additional sources, as well as altering operations to reduce the impact to schools as much as possible,” said Alex Walsh, executive director for Northeast Dairy Foods and Suppliers Associations.

“New York Farm Bureau appreciates the coordinated effort to share resources and guidance to address the milk carton supply shortage. New York’s dairy farms continue to produce the nutritious milk that our students need, and we are hopeful that by working together we can ensure it keeps flowing to the students who need it,” said David Fisher, New York Farm Bureau president.

Meanwhile, the California Department of Education (CDE) Nutrition Services Division (NSD) recognizes that unanticipated emergency conditions, including supply chain disruptions, may temporarily prevent program operators from offering fluid milk as required by the program’s meal pattern.

A recent CDE announcement provides school nutrition program operators with information about existing flexibilities related to inadequate milk supply issues, strategies for navigating the disruption, and a method of notifying the CDE of their need to utilize the fluid milk flexibilities.

Although program operators are expected to meet fluid milk requirements to the greatest extent possible, supply chain disruptions, including disruptions that limit milk variety or affect serving size, would be considered a temporary emergency condition for purposes of this flexibility.

Strategies for navigating the fluid milk supply disruption outlined in the CDE announcement include, among others: utilize procurement strategies and/or alternate fluid milk vendors; provide fluid milk via bulk milk dispensers; request less variety; and provide fluid milk via lesser-used forms such as UHT milk.



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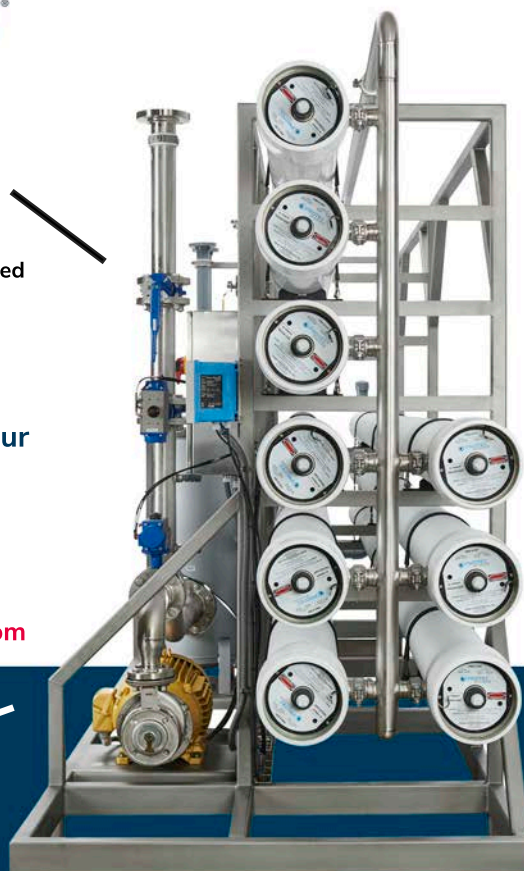
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Cheese Output Rises

(Continued from p. 1)

cent; Ohio, 20.9 million pounds, up 7.7 percent; Vermont, 11.6 million pounds, down 0.7 percent; Illinois, 5.5 million pounds, up 9.6 percent; and New Jersey, 5.2 million pounds, down 1.5 percent.

Cheese production in all other states during September totaled 203.1 million pounds, down 4.0 percent from a year earlier.

American-type cheese production totaled 465.8 million pounds, up 4.2 percent from September 2022.

American-type cheese output during the first nine months of 2023 totaled 4.3 billion pounds, up 2.1 percent from the first nine months of 2022.

Production of American-type cheese with comparisons to September 2022, was: Wisconsin, 84.8 million pounds, up 4.2 percent; Minnesota, 57.1 million pounds, up 5.2 percent; California, 47.0 million pounds, up 17.3 percent; Iowa, 15.6 million pounds, down 2.8 percent; and New York, 11.7 million pounds, down 0.7 percent.

American-type cheese production in all other states totaled 249.6 million pounds, up 2.6 percent from September 2022.

Cheddar production totaled 314.6 million pounds, up 3.1 percent from September 2022. Cheddar output during the January-September period totaled 3.01 billion pounds, up 1.8 percent from the same period last year.

Production of other American-type cheeses during September totaled 151.2 million pounds, up 6.6 percent from September 2022.

Italian & Other Cheeses

September production of Italian-type cheese totaled 479.5 million pounds, down 3.4 percent from September 2022. Italian cheese

production during the first nine months of 2023 totaled 4.36 billion pounds, down 1.1 percent from the first nine months of 2022.

Production of Italian cheese, with comparisons to September 2022, was: Wisconsin, 139.1 million pounds, down 5.8 percent; California, 130.6 million pounds, up 0.8 percent; New York, 28.0 million pounds, up 2.8 percent; Pennsylvania, 20.6 million pounds, down 8.6 percent; Minnesota, 8.0 million pounds, down 20.7 percent; and New Jersey, 2.7 million pounds, up 4.3 percent.

Mozzarella production totaled 380.5 million pounds, down 1.3 percent from September 2022. Mozz output during the first nine months of 2023 totaled 3.44 billion pounds, down 0.3 percent from the first nine months of 2022.

Production of other Italian cheese varieties during September, with comparisons to September 2022, was: Parmesan, 35.0 million pounds, down 22.2 percent; Provolone, 32.0 million pounds, up 2.7 percent; Ricotta, 21.5 million pounds, up 1.6 percent; Romano, 3.9 million pounds, down 26.2 percent; and all other Italian-type cheeses, 6.6 million pounds, down 20.4 percent.

September production of other cheese varieties, with comparisons to September 2022, was:

Swiss cheese: 26.6 million pounds, up 0.4 percent.

Cream and Neufchatel: 89.1 million pounds, down 2.2 percent.

Brick and Muenster: 16.3 million pounds, up 5.6 percent.

Hispanic cheese: 38.0 million pounds, up 15.4 percent.

Blue and Gorgonzola: 6.0 million pounds, down 16.4 percent.

Feta: 12.5 million pounds, down 19.3 percent.

Gouda: 4.9 million pounds, up 23.1 percent.

All other types of cheese: 13.6 million pounds, down 7.0 percent.

Whey Products Output

Production of dry whey, human, totaled 73.1 million pounds, down 2.0 percent from September 2022. Manufacturers' stocks of dry whey, human, totaled 80.5 million pounds up 24.7 percent from a year earlier.

Manufacturers' stocks of lactose, human and animal, at the end of September totaled 130.3 million pounds, down 18.8 percent from a year earlier and down 8.7 percent from a month earlier.

Production of whey protein concentrate, human, during September totaled 40.1 million pounds, up 5.9 percent from September 2022. Manufacturers' stocks of WPC, human, at the end of September totaled 79.2 million pounds, up 10.4 percent from a year earlier and 0.6 percent higher than a month earlier.

Production of whey protein isolates totaled 10.6 million pounds, down 1.5 percent from September 2022. Manufacturers' stocks of WPI at the end of September totaled 21.0 million pounds, down 1.5 percent from a year earlier but 5.6 higher than a month earlier.

Butter & Dry Milk Products

September butter production totaled 144.6 million pounds, up 2.9 percent from September 2022. Butter output during the January-September period totaled 1.59 billion pounds, up 3.5 percent from the same period last year.

Regional butter production, with comparisons to September 2022, was: West, 79.2 million pounds, down 1.3 percent; Central, 55.1 million pounds, up 11.4 percent; and Atlantic, 10.2 million pounds, down 5.7 percent.

Nonfat dry milk production was 101.1 million pounds, down 17.7 percent from September 2022. NDM during the first nine months of 2023 totaled 1.5 billion pounds, down 1.4 percent from the first nine months of 2022.

Manufacturers' shipments of nonfat dry milk totaled 129.9 million pounds, down 18.5 percent from September 2022. Manufacturers' stocks of NDM at the end of September totaled 243.6 million pounds, down 10.8 percent from a year earlier and down 9.6 percent from a month earlier.

Production of other dry milk products, with comparisons to September 2022, was: skim milk powder, 55.7 million pounds, down 18.7 percent; dry whole milk, 7.7 million pounds, down 35.9 percent; MPC, 16.3 million pounds, up 12.6 percent; and dry buttermilk, 8.6 million pounds, down 10.4 percent.

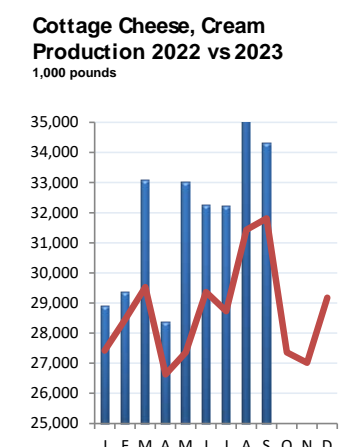
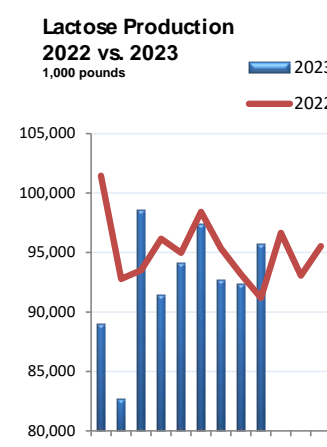
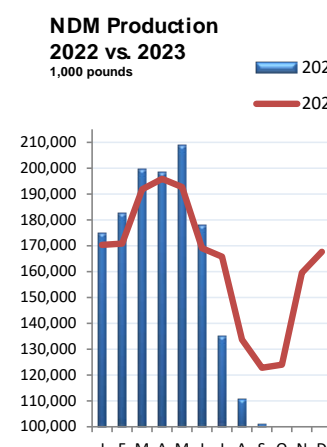
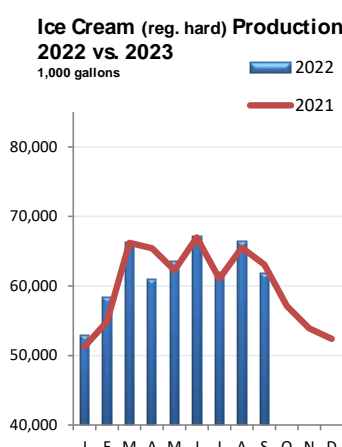
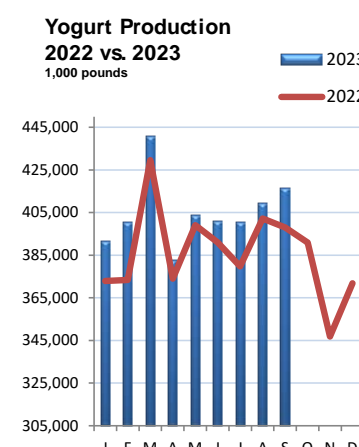
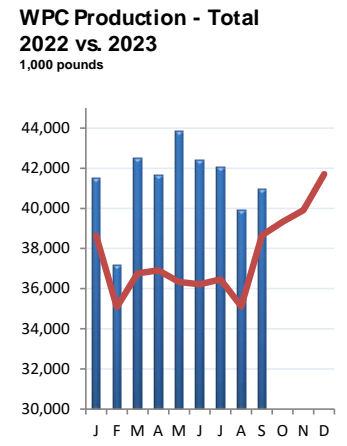
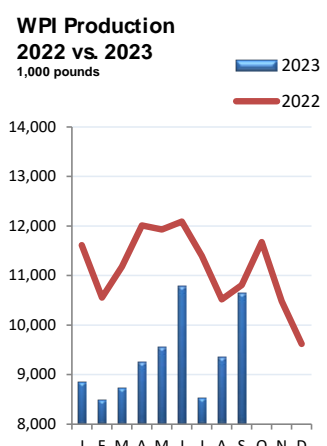
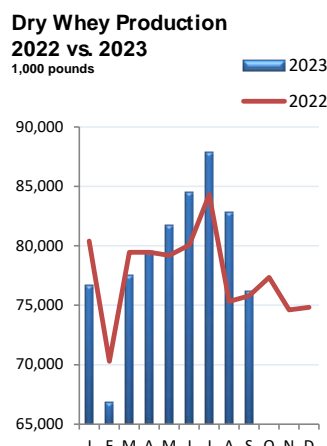
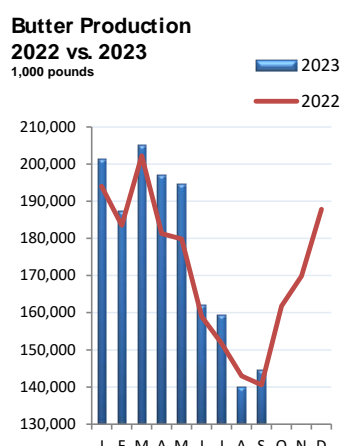
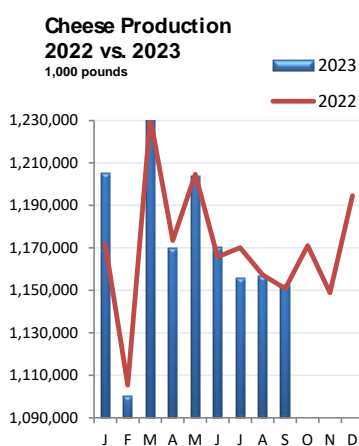
Yogurt & Other Dairy Products

September production of yogurt, plain and flavored, totaled 416.3 million pounds, up 4.6 percent from September 2022. Yogurt output during the January-September period totaled 3.65 billion pounds, up 3.5 percent from a year earlier.

Sour cream production in September totaled 117.8 million pounds, down 2.8 percent from September 2022. Sour cream output during the first nine months of 2023 totaled 1.1 billion pounds, unchanged from the first nine months of 2022.

Cream cottage cheese production totaled 32.4 million pounds, up 9.2 percent from September 2022. Lowfat cottage cheese output totaled 31.5 million pounds, up 24.1 percent from a year earlier.

Production of regular ice cream during September totaled 61.9 million gallons, down 1.9 percent from September 2022.



For First Time Since May, Sept. Class IV Volume Topped 1 Billion Pounds

Washington—The volume of milk pooled in Class IV in September on the seven federal milk marketing orders that pay dairy farmers a producer price differential (PPD) totaled 1.14 billion pounds, up 445.8 million pounds from August and 389.5 million pounds higher than in 2022, according to the uniform price announcements for those orders.

That's the first time since May that Class IV volume on those seven orders topped 1.0 billion pounds. Class IV volume on the seven orders bottomed out at 690.9 million pounds in August.

Class III volume on the seven orders totaled 6.94 billion pounds, down 260.1 million pounds from August but up 59.0 million pounds from 2022. That's the first time Class III volume on the seven orders has been under 7.0 billion pounds since April, when Class III volume totaled 5.2 billion pounds.

All seven orders reported positive PPDs, ranging from 21 cents per hundredweight for the Upper Midwest order to \$2.03 per hundred for the Northeast order.

On the California federal order, Class III volume totaled 1.48 billion pounds, down 55.2 million pounds from August but up almost 175 million pounds from September 2022. That was the fifth straight month in which California's Class III volume topped 1.4 billion pounds.

Class III utilization was 65.6 percent, down from 73.0 percent in August and down from 70.7 percent in September 2022.

Class IV volume on the California order totaled 276.0 million pounds, up 230.8 million pounds from August and up 225.9 million pounds from September 2022. Class IV utilization was 12.3 percent, up from 2.2 percent in August and up from 2.7 percent in September 2022.

A total of 2.25 billion pounds of milk was pooled on the California order during September, up 150.1 million pounds from August and up 409.1 million pounds from September 2022.

Class III volume on the Upper Midwest order totaled 2.5 billion pounds, down 83 million pounds from August and down 53.6 million pounds from September 2022. Class III utilization was 92.7 percent, down from 92.9 percent in August but up from 92.6 percent in September 2022.

Class IV volume on the Upper Midwest order totaled 14.0 million pounds, up 4.5 million pounds from August and up 3.8 million pounds from September 2022. Class IV utilization was 0.5 percent, up from 0.3 percent in

August and up from 0.4 percent in September 2022.

A total of 2.7 billion pounds of milk was pooled on the Upper Midwest order, down 82.1 million pounds from August and down 59.5 million pounds from September 2022.

On the Southwest order, Class III volume totaled 714.6 million pounds, down 14.7 million pounds from August and down 13.8 million pounds from September 2022.

Class III utilization was 60.2 percent, down from 64.9 percent in August and down from 64.3 percent in September 2022.

Class IV volume on the Southwest order totaled 57.1 million pounds, up 53.3 million pounds from August and up 32.7 million pounds from September 2022. Class IV utilization was 4.8 percent, up from 0.3 percent in August and up from 2.2 percent in September 2022.

A total of 1.19 billion pounds of milk was pooled on the Southwest order, up 64 million pounds from August and up 56 million pounds from September 2022.

September Class III volume on the Central order totaled 663.9 million pounds, up 40.6 million pounds from August but down 32.5 million pounds from September 2022.

Class III utilization was 49.7 percent, down from 51.4 percent in August and down from 54.0 percent in September 2022.

Class IV volume on the Central order totaled 217.0 million pounds, up 73.6 million pounds from August and up 69.8 million pounds from September 2022. Class IV utilization was 16.2 percent, up from 11.8 percent in

August and up from 11.4 percent in September 2022.

A total of 1.34 billion pounds of milk was pooled on the Central order, up 123.1 million pounds from August and up 47.3 million pounds from September 2022.

Class III volume on the Midwest order totaled 700.4 million pounds, up 5.3 million pounds from August and up 46 million pounds from September 2022.

Class III utilization was 45.8 percent, down from 49.9 percent in August and down from 50.2 percent in September 2022.

Class IV volume on the Midwest order in September totaled 109.5 million pounds, up 67.3 million pounds from August and up 84.2 million pounds from September 2022.

Class IV utilization was 7.2 percent, up from 3.0 percent in August and up from 2.0 percent in September 2022.

A total of 1.53 billion pounds of milk was pooled on the Midwest order in September, up 135.5 million pounds from August and up 226.6 million pounds from September 2022.

Class III volume on the Northeast order in September totaled 634.1 million pounds, down 53 million pounds from August but up 5.3 million pounds from September 2022.

Class III utilization was 29.1 percent, down from 29.7 percent in August but up from 28.7 percent in September 2022.

September Class IV volume on the Northeast order totaled 278.3 million pounds, down 48.4 million pounds from August and down 65 million pounds from September 2022. Class IV utilization was 12.8 percent, down from 14.1 percent in August and down from 15.7 percent in September 2022.

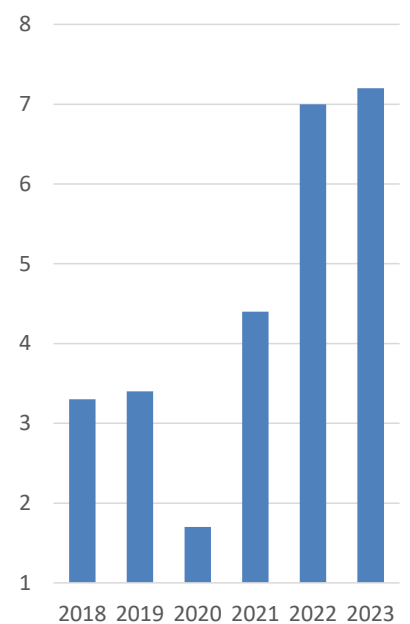
In September, a total of 2.18 billion pounds of milk was pooled on

the Northeast order, down 134.1 million pounds from August and down 8.7 million pounds from September 2022.

On the Pacific Northwest order in September, Class III volume totaled 230.4 million pounds, down 100 million pounds from August and down 67.3 million pounds from September 2022.

Volume of Milk Pooled in Class III: Sept

billions of pounds; all 11 orders; California order wasn't in effect in Sept 2018



Class III utilization was 39.4 percent, down from 53.0 percent in August and down from 48.7 percent in September 2022.

Class IV volume on the Pacific Northwest order totaled 184.9 million pounds, up 64.7 million pounds from August and up 38.1 million pounds from September 2022. Class IV utilization was 31.6 percent, up from 19.3 percent in August and up from 24.0 percent in September 2022.

A total of 584.8 million pounds of milk was pooled on the Pacific Northwest order, down 38.5 million pounds from August and down 26.0 million pounds from September 2022.

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Butterfat Boom

(Continued from p. 1)

analysis indicates this butterfat trend has far more upside and there are underserved butterfat markets.

In the early 1900s, butter was a staple in the US; from 1909 to 1942, annual per capita butter consumption stood above 16 pounds, according to the first data collected by the USDA.

Those were among the consumer demand factors that propelled higher component levels on dairy farms; butterfat content in milk shipped from dairy farms topped out at 3.98 percent in both 1944 and 1945, Geiger noted.

Evolving Milk Pricing Formulas

Milk pricing formulas evolved with the conditions to favor milk pounds in many federal milk marketing orders, Geiger pointed out. As full fat slowly fell out of favor, butterfat levels slumped from the high of 3.98 percent in 1945 to 3.69 percent by 1966.

For the ensuing 44 years, butterfat held in a tight window ranging from 3.65 percent to 3.69 percent, according to USDA data.

Markets never remain in a vacuum, Geiger noted. Cheese makers and other manufacturers who

crafted high-solids dairy products had long known that some milk yielded more cheese and butter when compared to other milk. In 1982, Utah State University researchers developed a new cheese yield pricing formula that better recognized the full contribution of butterfat and proteins to dairy-product yields.

This concept became known as multiple component pricing (MCP). The old Great Basin federal order became the first order to implement MCP in 1988.

Fast forward to the present, and over 92 percent of the US milk supply is priced using MCP formulas, according to Geiger. The economic incentives for the “supermajority” of dairy farmers are in place to send higher component milk to processors.

Before butterfat began to bounce back, cheese consumed 38 percent of the milkfat supply in 2000, followed by fluid milk, 18.1 percent; butter, 16.5; and frozen dairy products, 11.1 percent. By 2021, cheese consumed 42.3 percent of the milkfat supply; butter, 18.4 percent; fluid milk, 10.6 percent; and frozen dairy, 7 percent.

The drive for higher solids milk caused butterfat levels to soar, Geiger said. The breakout began to take place as butterfat moved

to 3.71 percent in 2011, busted out to 3.84 percent in 2017, and forged ahead to 3.92 percent in 2019. By 2021, butterfat broke past the 4 percent threshold, breaking the previous record of 3.98 percent set in 1944 and 1945. Given strong market signals, butterfat levels moved up to 4.08 percent in 2022.

Consumer demand certainly has been a driver, as well as producer push and processor pull, Geiger explained. In several regions, some dairy farmers face supply caps, known as base excess programs, which place limits on the pounds of milk shipped from each farm. Hence, dairy producers had incentive to improve milk’s component composition.

There was a time when milk and butterfat production were synonymous, but that’s no longer the case, Geiger said. When measured by pounds, milk and butterfat production mirrored one another from 1995 to 2010, each growing a collective 24 percent.

Then they diverged. From 2011 to 2022, butterfat pounds grew 27 percent, while milk pounds shipped from farms posted a smaller gain of 15 percent.

Given the dairy product pull, growth in butterfat pounds has become a more important metric to measure on-farm production growth as USDA data has revealed an 8 percent spread between milk and butterfat pounds in the past 12 years, Geiger pointed out.

Evolution Of Dairy Cows

Several factors have influenced the spread between milk and butterfat, Geiger explained. Without a doubt, on-farm feeding programs have played a major role in improving butterfat production.

Then there’s the dairy herd itself. Some dairy analysts like

to point to the “growing” of the nation’s dairy herd, referring to the influx of Jersey sires.

However, to move the national milkfat level from 3.66 percent to 4.08 percent in just 12 years involves more than just breed makeup. It involves genetic selection, Geiger said.

Today, the supermajority of dairy farms breed their cows and heifers via artificial insemination from cryogenically frozen bull semen, he noted. And according to the National Association of Animal Breeders, 89.9 percent of US semen sales were from Holstein bulls and another 9 percent were Jersey sires when the butterfat boom began in 2010. In 2022, the Holstein share shrank to 81.5 percent and the Jersey share grew to 15.3 percent.

Despite the growth in butterfat production, “tremendous upside potential still exists largely because the US remains a milkfat deficit nation,” Geiger observed. While US milkfat production grew from 7.3 billion pounds in 2011 to 9.3 billion pounds in 2022, milkfat imports into the US “exploded” by 120.6 percent.

Butter as a product category has been a major part of that narrative. In 2011, the US imported just 10.2 million pounds, but by 2022, imports rose to 105.8 million pounds, largely due to imported Irish butter that contains 82 percent milkfat.

To simply fill domestic butter demand, milkfat composition in the national bulk tank would have needed to climb to 4.13 percent in 2022, Geiger said.

That calculation doesn’t account for the 2023 growth in butter sales and other full-fat products to meet the growing domestic consumer demand.

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Odd-Chain Saturated Fat Found In Milkfat Found To Have Anti-Aging Properties

San Diego, CA—A study recently published in the journal *Nutrients* found that C15:0 (pentadecanoic acid), an odd-chain saturated fat found in trace amounts in milkfat, has anti-aging properties.

“In 2020, we discovered that C15:0 directly targets multiple hallmarks of aging and effectively repaired cells throughout the human body,” said Dr. Stephanie Venn-Watson, co-founder of Seraphina Therapeutics and the lead author of the study.

“Paired with the mounting science on C15:0’s long-term health benefits, we hypothesized that this nutrient plays an essential role in supporting human longevity. We were delighted by the study’s results,” Venn-Watson said.

In the study, pure C15:0 went head-to-head against three longevity drug candidates. Independent, third-party tests of all four compounds were conducted. Of the four compounds, results showed that pure C15:0 delivered the most cell repairing benefits, closely followed by rapamycin.

There is an “added urgency” to further evaluate C15:0 as a healthy aging nutrient, the study stated. Due in part to population-wide reduced intake of whole-fat dairy products (the primary dietary source of C15:0), circulating C15:0 concentrations have been declining while health issues have risen, suggesting a possible ecological link between decreased C15:0 and increased disease.

Further, circulating C15:0 concentrations decrease with advancing age, suggesting a possible link with age-related diseases, the study added.

Given the “voluminous supporting literature,” the study’s authors propose C15:0 as a natural, effective, and safe odd-chain saturated fatty acid with strong evidence that this essential nutrient supports healthy aging and longevity in humans, with cell-based activities that are as good as, or better than, leading longevity-enhancing prescription therapeutics.

The study was funded in part by the Office of Naval Research. Regarding conflicts of interest, the study noted that Venn-Watson is a co-founder of and employed by Epitracker, Inc., and Seraphina Therapeutics, Inc., which hold exclusive licensing rights from the US Navy to commercialize odd-chain saturated fatty acids as human and animal health products.

Price Forecasts

(Continued from p. 1)

per cow is slowed in the fourth quarter with slower-than-expected growth for the third quarter.

USDA’s milk production forecast for next year is reduced by 400 million pounds from last month’s forecast, to 230.0 billion pounds, as the lower forecasts of milk cows and milk per cow for late 2023 are carried into the next year.

Fat basis dairy imports for 2023 are unchanged as lower-than-expected imports in the third quarter are largely offset by expectations of higher butter and butterfat imports in the fourth quarter. Higher expected imports of butter and cheese support a higher fat basis import forecast for 2024. Skim-solids basis imports are lowered for 2023, reflecting

lower imports of milk proteins. For 2024, the skim-solids basis import forecast is unchanged.

Dairy exports in 2023 are lowered on a fat basis with lower expected sales of butter and milkfats, whole milk powder, and whey but higher lactose shipments are reflected in a higher skim-solids export forecast. For 2024, lowered expectations of butter sales more than offset stronger cheese exports and the fat basis export forecast is reduced. However, higher expected nonfat dry milk and cheese exports support a higher skim-solids export forecast.

Recent gains in butter prices have eroded more rapidly than previously expected and the butter price forecast for 2023 is lowered by 1.5 cents from last month, to \$2.6450 per pound. Strength in dry whey demand supports a

higher price forecast; USDA’s new forecast is 36.0 cents per pound, up 1.5 cents from last month.

USDA’s 2023 cheese price forecast is unchanged from last month, at \$1.7700 per pound, and the nonfat dry milk price forecast is raised slightly, to \$1.1800.

The 2023 Class III forecast is raised by five cents, to \$17.10 per hundredweight, on the higher dry whey price, but the Class IV price is lowered to \$19.20 per hundred.

For 2024, the price forecast for butter is reduced by 6.5 cents, to \$2.5900 per pound, as prices continue to soften from late-2023 levels. However, cheese, NDM and dry whey prices are raised, to \$1.8250 per pound, \$1.1700 per pound and 37.50 cents per pound, respectively, as lower milk production constrains production of those products.



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Agropur's Aditya Sharma Wins NCCIA Grading Contest



Aditya Sharma (center) of Agropur took the honor of top cheese grader during the annual cheese grading contest at the NCCIA annual meeting. Also in the photo (left to right) are Zac McCann of First District Association; Ryan Dykstra of Tetra Pak, sponsor of the event; Sharma; Nick Moryn, CEM Corporation; and Tim Czmowski, official chief grader of the event.

Sioux Falls, SD—Agropur's Aditya Sharma won the annual cheese grading contest, held last month as part of the North Central Cheese Industries Association (NCCIA) annual meeting.

Finishing second in the contest was Zac McCann of First District Association, while Nick Moryn of CEM Corporation finished third.

The remaining top 10 finishers from fourth to tenth place were: Chris Binder, Nelson-Jameson, Inc.; Carrie Owen of Prairie Farms; Matthew Siedschlaw, AMS Dairy; Bryan Anderson of Land O'Lakes finished in seventh place;

Tyler Rateike of Agropur; Steve Brennecke of Anderson Chemical; and Travis Szczesniak of Separators, Inc., finished in tenth place.

Contestants in the contest judge eight different cheeses for sensory and texture defects, previously graded by veteran chief contest grader Tim Czmowski.

The winners are those contestants that most closely match Czmowski's analysis of the cheese.

Ryan Dykstra of Tetra Pak was on hand to award the winners. Tetra Pak has sponsored the annual grading contest for many years.

PERSONNEL

AMANDA NELSON SASSE, a fourth-generation owner of Nelson-Jameson, will now serve in a dual role as vice president of philanthropy and social impact for Nelson-Jameson, as well as president of the Nelson-Jameson Foundation (NJF). Nelson Sasse is a direct descendant of two of Nelson-Jameson's co-founders, Earl Nelson and Ted Nelson, and has held leadership positions across multiple departments at the company for the past 14 years. As vice president of philanthropy and social impact, she will oversee the company's philanthropic and social impact efforts. As NJF president, Nelson Sasse will serve as liaison between Nelson-Jameson and NJF, where she will head quarterly board meetings, oversee committees, and spearhead marketing and public relations functions.

STUART WALKER, a 28-year veteran of the food industry's research and development sector, has joined Idaho's TechHelp as a food specialist. Walker most recently served as research and development director for Litehouse, Inc., working for the Sandpoint, ID-based food company for over a decade.

Global management consulting firm Kearney has appointed ROB DONGOSKI as a partner in its Consumer Industries & Retail Practice sector, where he will focus on agribusiness and food. Dongoski has more than 25 years of experience as a food industry consultant, mostly focused on agribusiness, food and beverage manufactur-

ing, grocery, and restaurants. His personal areas of consulting expertise include growth, strategy, mergers and acquisition, innovation, and operating model improvement.

EMMA JORGENSEN has joined Edge Dairy Farmer Cooperative as an assistant project manager to help farmers implement climate-smart production practices. Specifically, Jorgensen will help farmers determine what practices are most effective for their farms, and provide tools to document the environmental and financial effects. Jorgensen most recently worked for the US Department of Agriculture (USDA) as a dairy auditor for the Upper Midwest federal milk marketing order.

OBITUARIES

Nyleen Schmidt, 84, passed away Thursday, Oct. 5, 2023 at Hospice Home of Hope in Fond du Lac, WI. Nyleen and her husband, Lyle Schmidt, owned and operated Marchant Schmidt, Inc., a global manufacturer of industrial food cutting and other food processing solutions headquartered in Fond du Lac. Upon her husband's unexpected death in 1979, Nyleen took over the company as president and CEO. During her tenure, Marchant Schmidt made several expansions of its customer base, upgraded its facilities and diversified operations, with Nyleen earning many awards as a pioneering, woman-owned business leader. In 2007, Marchant Schmidt received the State of Wisconsin Governor's Export Achievement Award for top results in international sales.

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FDA Approves Use Of Jagua Blue As Color Additive In Dairy, Other Foods

Rockville, MD—The US Food and Drug Administration (FDA), in a final rule published in last Friday's *Federal Register*, announced that it is amending its color additives regulations to provide for the safe use of jagua (genipin-glycine) blue as a color additive in various food categories, including dairy, at levels consistent with good manufacturing practice (GMP).

FDA said it is taking this action in response to a color additive petition (CAP) submitted by Exponent, Inc., on behalf of Ecoflora SAS.

In a notification published in the *Federal Register* on Nov. 20, 2020, FDA announced that it had filed a color additive petition submitted by Ecoflora SAS. The petition proposed to amend the color additive regulations to provide for the safe use of jagua (genipin-glycine) blue, derived from the pulp of the unripe jagua fruit (*Genipa americana*), as a color additive at levels consistent with GMP in, among other products, flavored milk; dairy drinks and substitutes; dairy and dairy alternative yogurt; ice cream, frozen dairy and dairy alternative desserts, puddings, gelatins, ices, sorbets; flavored cream cheese-based spreads; and nutritional beverages and smoothies.

The color additive that is the subject of this petition is a dark blue liquid or powder produced by reacting genipin in the juice of the unripe fruit of *Genipa americana* with an equivalent amount of the amino acid glycine using mild heat, FDA explained. The principal coloring component in jagua (genipin-glycine) blue is a genipin-glycine polymer consisting of repeating dimeric units containing two genipin moieties reacted to add glycine units as side chains.

Based on the data and information in the petition and other available relevant information, FDA concluded that the petitioned use of jagua (genipin-glycine) blue as a color additive in, among other products, flavored milk; dairy drinks and substitutes; dairy and dairy alternative yogurt; ice cream, frozen dairy and dairy alternative desserts, puddings, gelatins, ices, sorbets; nutritional beverages and smoothies; and flavored cream cheese-based spreads, provided the amount of jagua blue does not exceed levels consistent with GMP.

FDA further concluded that this color additive will achieve its intended technical effect and is suitable for the petitioned use.

This rule is effective Dec. 4.

Foremost Farms, Ginkgo Partner On Upcycling Low-Value Co-Products

Middleton, WI, and Boston, MA—Foremost Farms USA and Ginkgo Bioworks on Wednesday announced a partnership to use advances in biotechnology to enable domestic, sustainable biomanufacturing of materials from dairy co-products.

Through this partnership, Foremost Farms will leverage Ginkgo's bioproduction services to develop and commercialize a new technology that could help upcycle billions of pounds of dairy co-products each year, according to the announcement.

Foremost Farms selected Ginkgo Bioworks as its partner of choice to develop a new upcycling technology because of Ginkgo's metabolic engineering and analytical capabilities, which will allow strain optimization for challenging environmental conditions while avoiding common toxicity issues.

Today, the dairy industry produces low-value co-products that contribute to its overall carbon footprint, the announcement

noted. Ginkgo aims to help Foremost build a technology to reduce this carbon footprint by upcycling these low-value co-products. This process could provide an environmentally friendly alternative to wasteful and carbon-intensive chemical production through domestic, sustainable biomanufacturing solutions.

"We're excited to partner with Ginkgo Bioworks, which can uniquely help Foremost Farms realize its goals.

Ginkgo's platform gives us access to everything we need to move from concept to commercialization faster, providing a competitive advantage," said Greg Schlafer, Foremost's president and CEO.

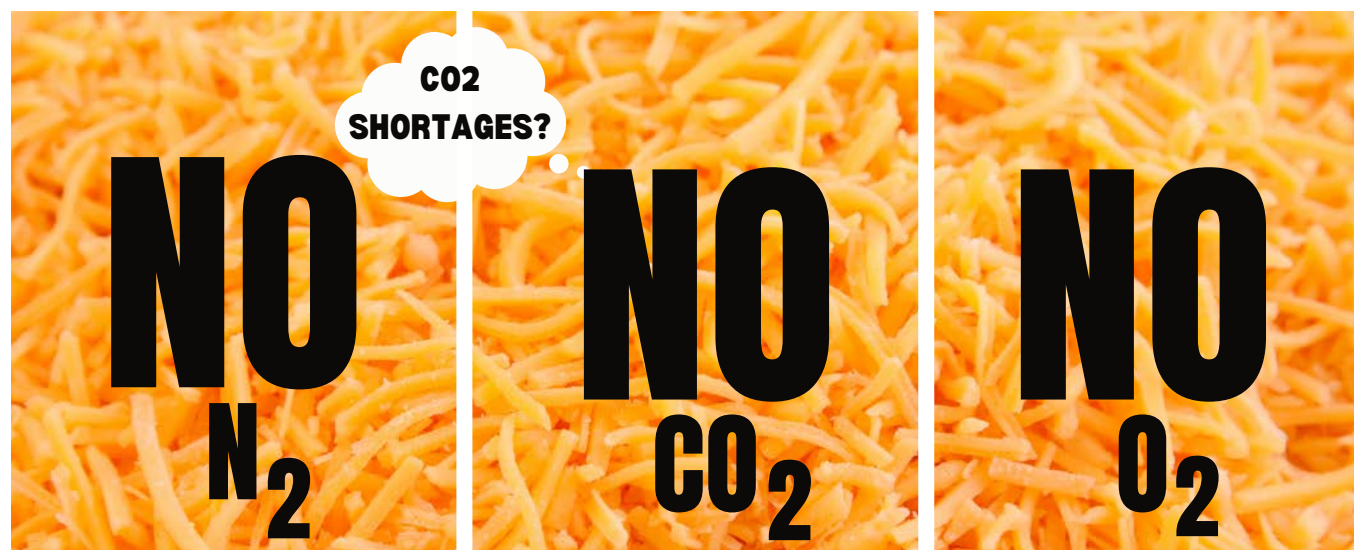
"We are innovating to continue our trajectory as environmental stewards that take care of our world and create value for dairy farm families by potentially lowering manufacturing costs and creating a significant new revenue stream for those farmers," Schlafer added.

"We're in a unique position to leverage Ginkgo's expertise because their flexible R&D service offerings allow us to creatively approach this significant opportunity in our value chain," commented Declan Roche, Foremost's chief commercial officer.

"With Ginkgo, we're able to pursue this exciting opportunity while minimizing our internal R&D fixed costs and allowing our team to remain focused on our core business," Roche continued.

"Ginkgo is always on the lookout for opportunities to use biology to create more sustainable products, and we are especially interested in helping customers in legacy industries develop improved production processes and a more circular economy," said Jennifer Wipf, Ginkgo's head of commercial, Cell Engineering.

"We're eager to put our advanced metabolic engineering capabilities to work for Foremost Farms and are proud to help accelerate efforts focused on sustainable biomanufacturing," Wipf added.



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PLANNING GUIDE

NDB, NMPF, UDIA Joint Annual Meeting: Nov. 13-15, Rosen Shingle Creek Hotel, Orlando, FL. Registration available at www.nmpf.org.

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.

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 updates.

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

'Iron Man' Cal Ripken Jr. To Headline Speaker Lineup At Dairy Strong 2024

Green Bay, WI—Baseball Hall of Famer Cal Ripken, Jr. will be among the featured speakers at Dairy Strong 2024 here Jan. 16-18 at the KI Center.

Hosted by the Dairy Business Association (DBA), the three-day event will center on "Growing Stronger Through Sustainability." Attendees will learn how sustainable farming practices can make a positive impact on both the environment and their business.

Educational sessions will also highlight technology, policy, consumer health and environmental stewardship.

Chris Urban of Dairy Management, Inc. (DMI) will look at dairy's role in health and wellness, and the importance of partnering with both large, influential companies and smaller entrepreneurs.

Featured speakers also include author and geopolitical strategist Thomas Barnett; and Scott Caine, president of Aimpoint Research. Caine will introduce new research on how farmers are adapting to a post-pandemic world.

Breakout sessions will cover modernizing milk pricing in the

US and long-term dairy trends; the industry's critical role in standardizing and collaborating on data, and what the future of data could look like for farmers; using AI for disease prevention in dairy cows; and how genomics can improve herd health and overall sustainability.

The popular Innovation Stage will return, along with the Wisconsin Master Cheesemakers Reception on Jan. 17, where DBA will announce its 2023 Advocate of the Year.

For networking opportunities, exhibit booths will surround Dairy Strong Square, a collection of social areas including a coffee shop, After Chores game room and the Recharge lounge.

Two optional tours have been scheduled: Schreiber Foods, and GLC Minerals' dryer, mill and packaging facility.

The early registration deadline is Nov. 30. Cost to attend prior to the deadline is \$250 for farmers, \$450 for corporate DBA members and \$600 for non-members.

For more details and online registration, visit www.dairyforward.com.

100th Ag Outlook Forum To Reflect On Century Of Progress, New Innovations

Arlington, VA—The US Department of Agriculture (USDA) has opened registration for the centennial edition of its Agricultural Outlook Forum.

The landmark two-day event, set for Feb. 15-16 here at the Crystal City Gateway Marriott, will celebrate 100 years of agricultural progress, and prepare for an even better future, Ag Secretary Thomas Vilsak said.

The theme for 2024 is "Cultivating the Future." Attendees will learn about the latest trends and developments in agriculture from and industry professionals and academics.

The forum will feature more than 30 educational sessions, covering a range of topics like commodity markets, trade, technology, and climate change.

Sessions will be geared toward those attendees directly involved in farming, marketing, policy-

making and other dairy industry personnel.

While the meeting is a live event, all sessions will also be live-streamed on a virtual platform.

Day one begins with a welcome from Deputy Ag Secretary Xochitl Torres Small, followed by USDA chief economist Seth Meyer on the 2024 agriculture economic and foreign trade outlook.

After lunch, breakout sessions will look at how to farm in a climate-smart direction; USDA initiatives on hunger, nutrition and health; the first look at the 2022 census of agriculture; and using robotics and AI technology for sustainable, equitable ag systems.

Thursday's lineup also covers a look back at the last 100 years of agriculture; advancing bio-economy in rural areas; the US food price outlook; and the latest developments in the bioengineering of plants and livestock.

Thursday evening with wrap with a special Celebrating Women in Agriculture reception featuring Iowa State University president Wendy Wintersteen as guest speaker.

Day two begins with a general session on fostering diverse opportunities for US ag exports in the global marketplace.

Breakout sessions will cover expanding market access through urban-rural networks; how to label cell-cultured meat; innovations in water management; dairy, organic and sugar outlooks; how to shape a sustainable future using indigenous knowledge; and how food and ag fares in the fifth National Climate Assessment.

Twenty students inducted into the Future Leaders in Agriculture Program will be in attendance, and will participate in several USDA briefings, with opportunities to discuss career options with USDA representatives.

For registration and more information, visit www.reg.eventmobi.com/USDAOutlookForum2024.

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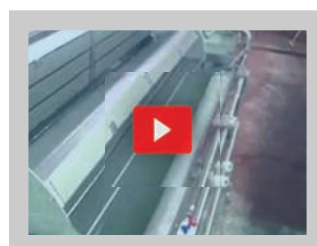
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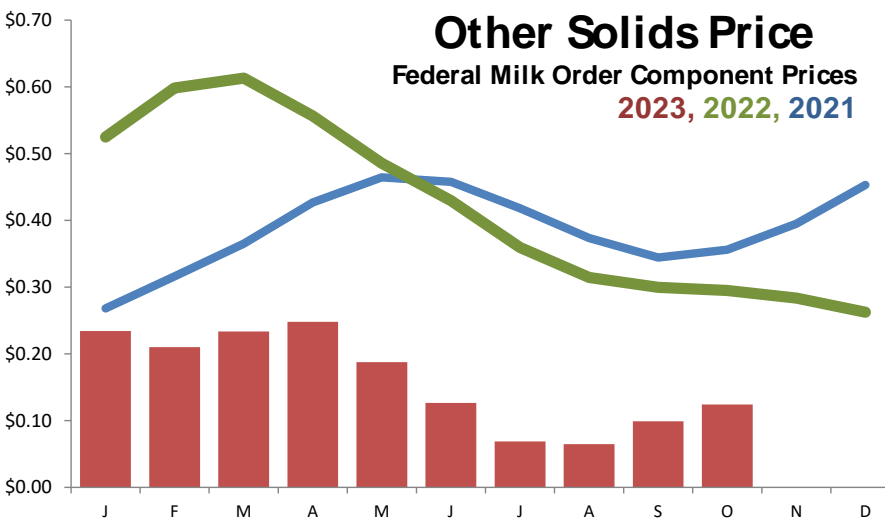


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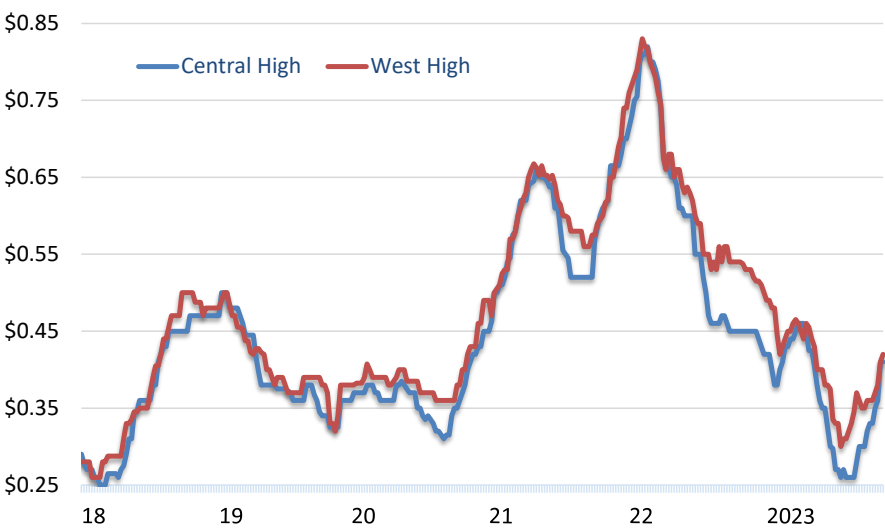


DAIRY FUTURES PRICES

SETTLING PRICE *Cash Settled

| Date | Month | Class III | Class IV | Dry Whey | NDM | Block Cheese | Cheese* | Butter* |
|--------|----------|-----------|----------|----------|---------|--------------|---------|---------|
| 11-3 | Nov 23 | 17.33 | 20.75 | 37.600 | 118.575 | 1.770 | 1.7700 | 301.300 |
| 11-6 | Nov 23 | 17.17 | 20.75 | 37.575 | 118.600 | 1.770 | 1.7530 | 299.500 |
| 11-7 | Nov 23 | 17.06 | 20.75 | 36.750 | 119.250 | 1.770 | 1.7430 | 297.500 |
| 11-8 | Nov 23 | 17.15 | 20.75 | 37.100 | 119.400 | 1.770 | 1.7520 | 297.000 |
| 11-9 | Nov 23 | 17.12 | 20.72 | 37.500 | 119.275 | 1.770 | 1.7460 | 296.850 |
| 11-3 | Dec 23 | 17.27 | 19.47 | 40.000 | 118.250 | 1.804 | 1.7620 | 264.050 |
| 11-6 | Dec 23 | 17.11 | 19.20 | 39.500 | 119.000 | 1.791 | 1.7500 | 262.000 |
| 11-7 | Dec 23 | 16.87 | 19.19 | 38.750 | 119.000 | 1.772 | 1.7310 | 259.000 |
| 11-8 | Dec 23 | 17.13 | 19.19 | 39.250 | 119.750 | 1.780 | 1.7530 | 256.000 |
| 11-9 | Dec 23 | 17.04 | 19.19 | 39.500 | 120.500 | 1.765 | 1.7430 | 260.000 |
| 11-3 | Jan 24 | 17.38 | 18.70 | 41.500 | 119.000 | 1.805 | 1.7680 | 251.725 |
| 11-6 | Jan 24 | 17.20 | 18.68 | 41.000 | 119.500 | 1.805 | 1.7600 | 249.000 |
| 11-7 | Jan 24 | 17.04 | 18.74 | 39.800 | 120.100 | 1.792 | 1.7450 | 248.400 |
| 11-8 | Jan 24 | 17.22 | 18.64 | 40.750 | 121.525 | 1.799 | 1.7590 | 245.500 |
| 11-9 | Jan 24 | 17.15 | 18.75 | 40.800 | 122.450 | 1.792 | 1.7500 | 247.025 |
| 11-3 | Feb 24 | 17.72 | 18.85 | 42.350 | 121.050 | 1.830 | 1.8050 | 250.250 |
| 11-6 | Feb 24 | 17.71 | 18.85 | 42.350 | 121.600 | 1.830 | 1.8040 | 249.000 |
| 11-7 | Feb 24 | 17.56 | 18.82 | 42.350 | 122.275 | 1.825 | 1.7950 | 249.000 |
| 11-8 | Feb 24 | 17.54 | 18.95 | 42.000 | 123.800 | 1.830 | 1.7920 | 246.000 |
| 11-9 | Feb 24 | 17.51 | 18.85 | 42.000 | 123.950 | 1.824 | 1.7820 | 246.000 |
| 11-3 | Mar 24 | 18.15 | 19.09 | 42.750 | 123.750 | 1.882 | 1.8400 | 249.200 |
| 11-6 | Mar 24 | 18.07 | 19.00 | 42.500 | 123.675 | 1.882 | 1.8400 | 247.500 |
| 11-7 | Mar 24 | 17.96 | 19.00 | 42.500 | 124.250 | 1.878 | 1.8310 | 249.000 |
| 11-8 | Mar 24 | 17.99 | 19.07 | 41.750 | 125.475 | 1.886 | 1.8350 | 247.300 |
| 11-9 | Mar 24 | 17.91 | 19.00 | 42.500 | 125.800 | 1.878 | 1.8230 | 248.000 |
| 11-3 | April 24 | 18.30 | 19.17 | 44.500 | 125.975 | 1.897 | 1.8640 | 250.250 |
| 11-6 | April 24 | 18.30 | 19.08 | 44.500 | 125.975 | 1.897 | 1.8530 | 249.000 |
| 11-7 | April 24 | 18.15 | 19.08 | 44.100 | 125.975 | 1.897 | 1.8500 | 249.000 |
| 11-8 | April 24 | 18.18 | 19.19 | 44.100 | 126.425 | 1.897 | 1.8510 | 248.000 |
| 11-9 | April 24 | 18.20 | 19.13 | 44.100 | 127.500 | 1.897 | 1.8500 | 248.525 |
| 11-3 | May 24 | 18.29 | 19.25 | 46.000 | 127.750 | 1.907 | 1.8700 | 249.200 |
| 11-6 | May 24 | 18.25 | 19.25 | 46.000 | 127.750 | 1.907 | 1.8640 | 250.000 |
| 11-7 | May 24 | 18.25 | 19.25 | 45.500 | 127.775 | 1.902 | 1.8590 | 248.000 |
| 11-8 | May 24 | 18.26 | 19.35 | 45.500 | 128.500 | 1.902 | 1.8600 | 248.000 |
| 11-9 | May 24 | 18.25 | 19.26 | 45.500 | 129.500 | 1.902 | 1.8640 | 248.000 |
| 11-3 | June 24 | 18.45 | 19.50 | 47.000 | 129.400 | 1.915 | 1.8780 | 250.250 |
| 11-6 | June 24 | 18.34 | 19.50 | 47.000 | 129.400 | 1.915 | 1.8700 | 248.500 |
| 11-7 | June 24 | 18.34 | 19.50 | 47.000 | 129.400 | 1.915 | 1.8650 | 249.700 |
| 11-8 | June 24 | 18.38 | 19.50 | 47.000 | 129.400 | 1.915 | 1.8670 | 249.750 |
| 11-9 | June 24 | 18.38 | 19.50 | 47.000 | 131.500 | 1.915 | 1.8680 | 248.500 |
| 11-3 | July 24 | 18.65 | 19.65 | 47.000 | 131.300 | 1.935 | 1.8860 | 249.200 |
| 11-6 | July 24 | 18.59 | 19.65 | 47.000 | 131.300 | 1.935 | 1.8890 | 249.700 |
| 11-7 | July 24 | 18.50 | 19.65 | 47.000 | 131.300 | 1.935 | 1.8470 | 249.700 |
| 11-8 | July 24 | 18.42 | 19.65 | 47.000 | 131.300 | 1.935 | 1.8740 | 249.750 |
| 11-9 | July 24 | 18.57 | 19.65 | 47.000 | 132.800 | 1.934 | 1.8900 | 249.000 |
| 11-3 | Aug 24 | 18.75 | 19.80 | 47.000 | 132.850 | 1.947 | 1.8950 | 250.250 |
| 11-6 | Aug 24 | 18.70 | 19.80 | 47.000 | 133.000 | 1.947 | 1.8950 | 249.000 |
| 11-7 | Aug 24 | 18.66 | 19.80 | 47.000 | 133.000 | 1.947 | 1.8850 | 249.500 |
| 11-8 | Aug 24 | 18.56 | 19.80 | 47.000 | 133.000 | 1.947 | 1.8850 | 249.500 |
| 11-9 | Aug 24 | 18.56 | 19.80 | 47.000 | 134.125 | 1.947 | 1.9000 | 249.000 |
| 11-3 | Sept 24 | 18.80 | 19.90 | 47.000 | 134.225 | 1.955 | 1.9050 | 249.000 |
| 11-6 | Sept 24 | 18.75 | 19.90 | 47.000 | 134.300 | 1.955 | 1.9000 | 249.500 |
| 11-7 | Sept 24 | 18.69 | 19.90 | 47.000 | 134.325 | 1.955 | 1.8930 | 249.500 |
| 11-8 | Sept 24 | 18.58 | 19.90 | 47.000 | 134.325 | 1.955 | 1.8930 | 249.500 |
| 11-9 | Sept 24 | 18.58 | 19.90 | 47.000 | 135.500 | 1.948 | 1.8950 | 249.500 |
| Nov. 9 | | 21,777 | 7,203 | 2,504 | 8,348 | 2,548 | 17,457 | 8,372 |

Dry Whey Prices: 2018 – November 10, 2023
High Range (Central and West: Mostly)



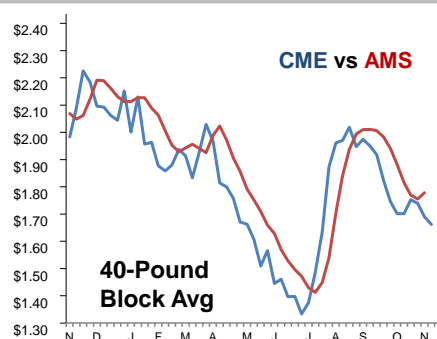
AVG MONTHLY ANIMAL FEED PRICES: USDA

| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|-----|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| '17 | .3785 | .4002 | .4055 | .3900 | .3888 | .3936 | .3878 | .3448 | .3055 | .2590 | .2305 | .2008 |
| '18 | .1980 | .1888 | .1836 | .1907 | .1915 | .2326 | .2346 | .2767 | .3042 | .3384 | .3263 | .3275 |
| '19 | .3655 | .3376 | .3105 | .2852 | .2718 | .2725 | .2657 | .2598 | .2550 | .2509 | .2446 | .2924 |
| '20 | .2900 | .2997 | .2973 | .2968 | .3098 | .2914 | .2680 | .2540 | .2767 | .2895 | .3142 | .3416 |
| '21 | .3784 | .3913 | .4752 | .5469 | .5613 | .5255 | .4719 | .4168 | .4024 | .4643 | .4853 | .5100 |
| '22 | .5638 | .6624 | .6586 | .5525 | .5138 | .4873 | .4435 | .3863 | .3664 | .3308 | .3250 | .3159 |
| '23 | .2967 | .2895 | .3375 | .3438 | .2784 | .2257 | .2076 | .1974 | .2285 | .2476 | | |

DAIRY PRODUCT SALES

Nov. 8, 2023—AMS' National Dairy Products Sales Report. Prices included are provided each week by manufacturers. Prices collected are for the (wholesale) point of sale for natural, unaged Cheddar; boxes of butter meeting USDA standards; Extra Grade edible dry whey; and Extra Grade and USPH Grade A nonfortified NFDM.

•Revised



| Week Ending | Nov. 4 | Oct. 28 | Oct. 21 | Oct. 14 |
|---|------------|---------------|------------|------------|
| 40-Pound Block Cheddar Cheese Prices and Sales | | | | |
| Weighted Price | | Dollars/Pound | | |
| US | 1.7780 | 1.7551 | 1.7692 | 1.8155 |
| Sales Volume | | Pounds | | |
| US | 12,637 | 11,807,364 | 11,873,632 | 12,100,340 |
| 500-Pound Barrel Cheddar Cheese Prices, Sales & Moisture Content | | | | |
| Weighted Price | | Dollars/Pound | | |
| US | 1.8048 | 1.7565 | 1.7234 | 1.7088 |
| Adjusted to 38% Moisture | | | | |
| US | 1.7168 | 1.6741 | 1.6417 | 1.6264 |
| Sales Volume | | Pounds | | |
| US | 11,747,863 | 13,035,507 | 13,008,680 | 12,658,337 |
| Weighted Moisture Content | | Percent | | |
| US | | 34.95 | 34.91 | 34.86 |
| AA Butter | | | | |
| Weighted Price | | Dollars/Pound | | |
| US | 3.2677 | 3.2878 | 3.3212 | 3.2740 |
| Sales Volume | | Pounds | | |
| US | 3,393,965 | 3,053,552 | 2,888,628 | 3,101,681 |
| Extra Grade Dry Whey Prices | | | | |
| Weighted Price | | Dollars/Pound | | |
| US | 0.3554 | 0.3403 | 0.3173 | 0.3133 |
| Sales Volume | | Pounds | | |
| US | 4,678,419 | 6,936,345 | 7,088,701 | 5,927,656 |
| Extra Grade or USPHS Grade A Nonfat Dry Milk | | | | |
| Average Price | | Dollars/Pound | | |
| US | 1.1757 | 1.1729 | 1.1635 | 1.1456 |
| Sales Volume | | Pounds | | |
| US | 18,738,933 | 16,514,707 | 19,829,037 | 16,956,771 |

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____ Cheese Manufacturer

____ Cheese Processor

____ Cheese Packager

____ Cheese Marketer (broker, distributor, retailer)

____ Other processor (butter, cultured products)

____ Whey processor

____ Food processing/Foodservice

____ Supplier to dairy processor

JOB FUNCTION:

____ Company Management

____ Plant Management

____ Plant Personnel

____ Laboratory (QC, R&D, Tech)

____ Packaging

____ Purchasing

____ Warehouse/Distribution

____ Sales/Marketing

DAIRY PRODUCT MARKETS

AS REPORTED BY THE US DEPARTMENT OF AGRICULTURE

WHOLESALE CHEESE MARKETS

NATIONAL - NOV. 3: Milk supplies are slowly increasing for cheese makers in most of the country. That said, overall availability is not noted as abundant. The fall/winter holidays, though, are expected to bring more plentiful milk supplies for Class III use across the nation. Cheese makers in the Midwest reported spot prices from flat market to \$1-over Class III. Cheese demand is varied nationwide, but steady to hearty according to most cheese contacts. Labor issues continue to deter some processing in the East, while cheese production is generally stable. Cheese market tones remain on somewhat shaky ground. One positive note is that the CME price spread between blocks and barrels is slight, which contacts view as an indicator of market stability.

NORTHEAST - NOV. 8: Steady milk volumes are clearing into Class III operations. Cheese inventories are growing week over week, though domestic demand is varied. Some contacts share retail demand is stronger than the foodservice sector. Restaurant prices continue to dissuade consumers. Contacts share that retail holiday demand is expected to pick up in the near term. Cheddar remains the most highly demanded American type cheese. Cold storage space is available.

MIDWEST AREA - NOV. 8: Despite an increase in late-week/weekend milk offers last week, the spot milk price range is still holding in a similar pricing pattern this week. The \$2-over Class III prices are not being reported, but some cheese makers who are opting for spot milk loads say \$1-over is the going rate in the area. Other processors say offers have remained quiet, but they're not looking for outside sources at this time. Cheese inventories are moving in a steady fashion, as cheese makers say they are seeing similar numbers to previous years'. Market tones are under some clear pressure. The block-to-barrel price gap widened until Wednesday, when a bearish block price dip narrowed the separation. Plant maintenance/downtime continue to be reported in the region, but most operations are running at regular/busy schedules.

WEST - NOV. 8: Cheese manufacturers and distributors indicate demand from retail and foodservice channels is steady to moderate for varietal cheeses in the West. Industry sources indicate restaurant-goers have shown less activity recently. Stakeholders say inventories are comfortable. A few cheese manufacturers note slightly decreasing spot load inventories. Export demand is moderate to light. Sentiments of some stakeholders remain that current domestic cheese prices, when compared to European Union/Oceania cheese prices, are not creating strong export opportunities. Class III milk demand remains strong to steady, but for some parts of the West, handlers relay somewhat limited extra Class III spot milk loads. Cheese manufacturing schedules are mostly steady. A few American style cheese manufacturers relay production remains focused on Cheddar.

FOREIGN -TYPE CHEESE - NOV. 8: Milk production is steady to lighter in Europe, and some contacts report farm level milk output is down slightly from last year. Cheese makers say tight milk volumes are hampering their ability to run full production schedules and are contributing to higher input prices. Cheese inventories are tight, and some manufacturers say they are unable to fulfill orders from spot purchasers looking for additional loads. A few market participants say they are concerned that cheese inventories for some varieties will not be sufficient to meet demand for the end-of-year holidays. Meanwhile, demand for cheese from retail purchasers remains strong in Europe. Foodservice demand for cheese is steady in the region.

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

| Variety | Date: 11/8 | 11/1 | Variety | Date: 11/8 | 11/1 |
|--------------|------------|--------|--------------|------------|--------|
| Cheddar Curd | \$1.90 | \$1.88 | Mild Cheddar | \$1.85 | \$1.84 |
| Young Gouda | \$2.13 | \$1.90 | Mozzarella | \$1.72 | \$1.70 |

WHOLESALE BUTTER MARKETS - NOVEMBER 8

NATIONAL: Butter markets are under some bearish pressure following a record-breaking run in the early fall. Cream availability is growing in the East and Midwest regions. Western availability remains somewhat snug, despite component level increases in that region. Central processors say churning rates have doubled (or more) since early October, and cream multiples at/around 1.20 are clearly a major reason for that. Eastern contacts say Thanksgiving orders are wrapped up, while western butter plant contacts say Canadian demand for this quarter has held somewhat strong.

CENTRAL: Markets have clearly taken a bearish turn. Contacts expected some correction following a notably bullish October, but some say they were not expecting the rapidity of the price shifts (nearly \$.50 down from Halloween.) Cream is widely available. Reported cream multiples have moved below the 1.20 mark, and some say that there are situational trades closer to flat market. Some plant contacts are continuing to micro-fix in order to avoid inventory buildups in the wake of a quickly changing market. This is adding to the increase in cream availability. Butter demand has slowed, particularly in the foodservice sector. Retail interests remain, but the markets are expected to cause some hesitation until they become more settled.

NORTHEAST: Tuesday's close marks the first sub \$3 price since Sept. 21 this year. Cream supplies are becoming more

available week over week. Churning activity is varied. Some processors are taking advantage of churning as cream multiples drop, while other plant managers report they are micro-fixing to keep inventory costs controlled. Unsalted inventory is said to be more available than salted varieties. Unsalted varieties are in higher demand for holiday baking needs, and contacts predict peak retail demand is still yet to come.

WEST: In parts of the West, handlers note fat component levels in current milk output have improved. Likewise, stakeholders note cream availability has improved, overall, in the region. However, cream in the Northwestern part of the region remains tighter. Retail butter demand is strong to steady domestically. Although cream multiples and butter prices are subsiding, butter makers are hesitant to purchase much additional cream beyond contracted volumes. Instead, some manufacturers are more comfortable in using available inventories to fill current market needs. A few butter makers suggest they will wait until Thanksgiving before starting to churn again, giving them a chance to let markets settle before working to rebuild butter inventories. That said, a few butter makers are starting churns again. Bulk butter production schedules are lighter compared to retail production schedules, keeping bulk butter tighter. Most plant managers indicate inventories are at satisfactory levels thus far in Q4 for the anticipated holiday season demand. Export demand is steady from Canadian purchasers, but light elsewhere.

NATIONAL - CONVENTIONAL DAIRY PRODUCTS

Total conventional dairy ads increased by 89 percent, and organic dairy ads increased by 66 percent. Conventional cheese was the most advertised dairy category. Conventional block cheese, shredded cheese, and sliced cheese in 6- to 8-ounce packages had average advertised prices of \$2.50, \$2.63, and \$3.16, respectively. The sliced style cheese had the biggest increase in price from the prior week, going 47 cents higher.

Butter was heavily advertised this week. The current average price for 1-pound butter is \$4.65, up 67 cents from the prior week. The average price for 1-pound organic butter is \$7.56, which represents an organic premium of \$2.91.

Cottage cheese, Cream cheese, ice cream, and sour cream were all well represented in ads – each commodity more heavily advertised than milk this week.

RETAIL PRICES - CONVENTIONAL DAIRY - NOVEMBER 10

| Commodity | US | NE | SE | MID | SC | SW | NW |
|-----------------------|------|-------|------|------|------|------|------|
| Butter 8 oz | 3.48 | 3.99 | 4.35 | | 2.37 | 3.50 | |
| Butter 1# | 4.65 | 3.96 | 4.99 | 3.68 | 4.98 | 3.96 | 3.19 |
| Cheese 6-8 oz block | 2.50 | 2.99 | 2.25 | 2.78 | 2.07 | 2.99 | 1.99 |
| Cheese 6-8 oz shred | 2.63 | 2.64 | 2.61 | 2.45 | 2.76 | 2.63 | 2.20 |
| Cheese 6-8 oz sliced | 3.16 | 2.90 | 3.29 | 3.16 | 3.51 | 2.51 | |
| Cheese 1# block | 4.30 | 3.99 | 4.33 | 3.99 | 3.83 | 3.99 | 6.49 |
| Cheese 1# shred | 5.06 | | 5.14 | 3.99 | 4.86 | 3.99 | |
| Cheese 2# block | 7.56 | 11.49 | | | | 6.50 | 6.49 |
| Cheese 2# shred | 7.25 | 7.99 | 7.48 | 7.98 | 7.46 | 6.83 | 6.49 |
| Cottage Cheese 16 oz | 6.88 | 2.89 | 2.72 | 2.29 | | 1.97 | 2.11 |
| Cottage Cheese 24 oz | 2.65 | | 3.27 | 3.69 | 2.58 | | 3.81 |
| Cream Cheese 8 oz | 3.12 | 1.91 | 2.45 | 1.89 | 1.80 | 2.51 | 1.88 |
| Egg Nog quart | 3.96 | 3.99 | 3.99 | 4.06 | | | 2.99 |
| Egg Nog 1/2 gallon | 3.58 | 5.99 | 5.99 | 3.16 | 2.99 | 2.99 | |
| Milk 1/2 gallon | 2.43 | | | | | 2.72 | 1.63 |
| Milk gallon | 3.50 | 3.78 | 3.53 | 2.89 | 3.57 | 3.87 | 2.47 |
| Ice Cream 14-16 oz | 3.73 | 3.95 | 3.86 | 3.95 | 2.97 | 3.23 | 2.99 |
| Ice Cream 48-64 oz | 4.33 | 3.91 | 5.18 | 4.49 | 5.01 | 3.55 | 3.44 |
| Flavored Milk gallon | 3.09 | | 3.23 | 2.92 | 2.99 | | 2.47 |
| Sour Cream 16 oz | 2.11 | 2.08 | 2.21 | 1.81 | 2.27 | 1.99 | 1.62 |
| Sour Cream 24 oz | 3.04 | 3.99 | 2.85 | 3.98 | 3.07 | 2.99 | |
| Yogurt (Greek) 4-6 oz | 0.97 | 1.14 | 0.97 | 1.03 | 1.09 | 0.96 | 0.95 |
| Yogurt (Greek) 32 oz | 5.02 | 5.08 | 5.05 | | 5.03 | | 1.99 |
| Yogurt 4-6 oz | 0.66 | 0.64 | 0.71 | 0.75 | 0.68 | 0.37 | 0.66 |
| Yogurt 32 oz | 2.80 | 3.45 | 2.62 | 3.04 | 2.63 | 2.87 | 2.79 |

ORGANIC DAIRY - RETAIL OVERVIEW

| National Weighted Retail Avg Price: | | | |
|-------------------------------------|--------|---------------------------|--------|
| Butter 8 oz: | \$5.43 | Cream Cheese 8 oz: | \$3.25 |
| Butter 1 lb: | \$7.56 | Ice Cream 48-64 oz | \$8.15 |
| Cheese 6-8 oz shred: | \$4.92 | Milk 1/2 gallon: | \$4.71 |
| Cheese 6-8 oz block: | \$5.47 | Milk gallon: | \$6.99 |
| Cheese 6-8 oz sliced: | \$4.49 | Flavored Milk 1/2 gallon: | |
| Cheese 1 lb shred: | \$8.99 | Yogurt 4-6 oz: | \$1.89 |
| Cheese 2 lb shred: | | Greek Yogurt 4-6 oz: | |
| Cottage Cheese 16 oz: | \$3.90 | Yogurt 32 oz: | \$4.57 |
| | | Yogurt Greek 32 oz | |

DRY DAIRY PRODUCTS - NOVEMBER 9

DRY WHEY EAST: The dry whey price series jumped higher at both ends of the range. Farm level milk outputs are increasing week over week, and cheese processing is steady. Liquid whey is available for drying. Contacts relay the strength of the whey protein concentrate market continues to influence the dry whey market. Inventories of dry whey are tightening in the East. Some feed contacts share that their needs are being met through contracted loads.

BUTTERMILK WEST: Dry buttermilk prices moved higher on the bottom ends of both the range and mostly price series. Some manufacturers relay production schedules are focusing on fulfilling contractual obligations, limiting spot load inventory added. A few manufacturers anticipate December production meeting contractual obligations only. Stakeholders indicate spot loads of dry buttermilk are tight. Some note sentiments that, if possible, off grade dry buttermilk may be used to fill some non-edible needs. Demand from international buyers is moderate to light. Manufacturers

indicate steady dry buttermilk production. Buttermilk is slightly more available for drying, with some more active butter churns and some ice cream production slowing.

WPC CENTRAL/WEST: Contacts report strong demand for WPC 34%. Animal feed purchasers continue to purchase loads as market participants say WPC 34% remains a good value compared to alternative dairy protein sources. Some stakeholders say bullish market conditions for whey protein concentrate 80% and whey protein isolate are contributing to higher prices for WPC 34% as drying operations are focusing more of their production times on these commodities and limiting their WPC 34% production schedules.

NDM WEST: Prices for low/medium NDM moved lower on both ends of the range and mostly price series. Stakeholders mostly note steady demand domestically. Manufacturers and distributors indicate mixed inventory levels, but spot loads are readily available for buyers, overall.

WEEKLY COLD STORAGE HOLDINGS

SELECTED STORAGE CENTERS IN 1,000 POUNDS - INCLUDING GOVERNMENT

| DATE | BUTTER | CHEESE |
|----------------|--------|--------|
| 11/06/23 | 32,797 | 80,261 |
| 11/01/23 | 32,529 | 80,418 |
| Change | 268 | -157 |
| Percent Change | 1 | 0 |

CME CASH PRICES - NOVEMBER 6 - 10, 2023

Visit www.cheesereporter.com for daily prices

| | 500-LB CHEDDAR | 40-LB CHEDDAR | AA BUTTER | GRADE A NFDM | DRY WHEY |
|---------------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| MONDAY November 6 | \$1.5800 (-6) | \$1.7000 (+3½) | \$3.0100 (-9¼) | \$1.1750 (-1) | \$0.3850 (-¼) |
| TUESDAY November 7 | \$1.5450 (-3½) | \$1.6975 (-¼) | \$2.8975 (-11¼) | \$1.1700 (-½) | \$0.3850 (NC) |
| WEDNESDAY November 8 | \$1.6200 (+7½) | \$1.6300 (-6¼) | \$2.7975 (-10) | \$1.1800 (+1) | \$0.3925 (+¾) |
| THURSDAY November 9 | \$1.6500 (+3) | \$1.6400 (+1) | \$2.7000 (-9¼) | \$1.2000 (+2) | \$0.3950 (+¼) |
| FRIDAY November 10 | \$1.6500 (NC) | \$1.6000 (-4) | \$2.6000 (-10) | \$1.2000 (NC) | \$0.3975 (+1) |
| Week's AVG \$ Change | \$1.6090 (-0.0490) | \$1.6535 (-0.0365) | \$2.8010 (-0.3890) | \$1.1850 (-0.0035) | \$0.3910 (+0.0185) |
| Last Week's AVG | \$1.6580 | \$1.6900 | \$3.1900 | \$1.1885 | \$0.3725 |
| 2022 AVG Same Week | \$2.0165 | \$2.0910 | \$2.8765 | \$1.3970 | \$0.4390 |

MARKET OPINION - CHEESE REPORTER

Cheese Comment: Two cars of blocks were sold Monday at \$1.7000, which raised the price. No blocks were sold Tuesday; the price declined on an uncovered offer of 1 car at \$1.6975. Four cars of blocks were sold Wednesday, the last at \$1.6300, which set the price. Five cars of blocks were sold Thursday, the last at \$1.6400, which raised the price. On Friday, 4 cars of blocks were sold, the last at \$1.6000, which set the price. The barrel price dropped Monday on a sale at \$1.5800, fell Tuesday on a sale at \$1.5450, jumped Wednesday on an unfilled bid at \$1.6200, and increased Thursday on a sale at \$1.6500.

Butter Comment: The price dropped Monday on an uncovered offer at \$3.0100, declined Tuesday on a sale at \$2.8975, dropped Wednesday on an uncovered offer at \$2.7975, fell Thursday on a sale at \$2.7000, and declined Friday on a sale at \$2.6000.

Nonfat Dry Milk Comment: The price fell Monday on a sale at \$1.1750, dropped Tuesday on a sale at \$1.1700, increased Wednesday on an unfilled bid at \$1.1800, and rose Thursday on a sale at \$1.2000.

Dry Whey Comment: The price declined Monday on a sale at 38.50 cents, rose Wednesday on an unfilled bid at 39.25 cents, increased Thursday on a sale at 39.50 cents, and rose Friday on a sale at 39.75 cents.

WHEY MARKETS - NOVEMBER 6 - 10, 2023

RELEASE DATE - NOVEMBER 9, 2023

| | |
|---|---|
| Animal Feed Whey—Central: Milk Replacer: | .2400 (+1) – .2700 (+1) |
| Buttermilk Powder: | |
| Central & East: | 1.0000 (NC) – 1.1000 (NC) West: 1.0800 (+3) – 1.2600 (NC) |
| Mostly: | 1.1200 (+2) – 1.2000 (NC) |
| Casein: Rennet: | 3.4000 (NC) – 3.8000 (NC) Acid: 3.4000 (NC) – 3.8000 (NC) |
| Dry Whey—Central (Edible): | |
| Nonhygroscopic: | .3300 (+1) – .4200 (NC) Mostly: .3700 (NC) – .4100 (NC) |
| Dry Whey—West (Edible): | |
| Nonhygroscopic: | .3500 (+1) – .4350 (+½) Mostly: .3800 (+1) – .4200 (+1) |
| Dry Whey—NE: | .3650 (+5) – .4375 (+5) |
| Lactose—Central and West: | |
| Edible: | .1400 (+2) – .3900 (NC) Mostly: .2100 (NC) – .3000 (NC) |
| Nonfat Dry Milk—Central & East: | |
| Low/Medium Heat: | 1.1600 (NC) – 1.2400 (NC) Mostly: 1.1800 (NC) – 1.2200 (NC) |
| High Heat: | 1.2900 (+1) – 1.3600 (+1) |
| Nonfat Dry Milk—Western: | |
| Low/Med Heat: | 1.1400 (-5) – 1.2600 (-1) Mostly: 1.1900 (-1) – 1.2300 (-1) |
| High Heat: | 1.2900 (-2) – 1.4250 (-2) |
| Whey Protein Concentrate—34% Protein: | |
| Central & West: | .7800 (NC) – 1.0200 (+3) Mostly: .8400 (+1) – .9400 (+1) |
| Whole Milk: | 1.8500 (NC) – 2.1700 (NC) |

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 | | |

USDA Buys String, Kosher Cheese; Cancels Process Cheese Solicitation

Washington—The US Department of Agriculture (USDA) on Thursday announced the awarding of a contract to Miceli Dairy Products Company for a total of 924,727.5 pounds of low moisture part skim Mozzarella String cheese for delivery from Jan. 1 through Mar. 31, 2024.

The price range of the String cheese being purchased is \$2.8387 to \$3.0450 per pound. The total price of the String cheese, which is being purchased in support of child nutrition and other related domestic food distribution programs, is \$2,671,482.87.

Meanwhile, on Wednesday, USDA announced the awarding of a contract to Bongards Creameries for a total of 118,800 pounds of Kosher process white sliced cheese loaves, for delivery in January 2024.

The Kosher process cheese is being purchased for \$4.4650 per pound, or a total price for the contract of \$530,442.00. The cheese is being purchased in support of child nutrition and other related domestic food distribution programs.

In other USDA commodity procurement news, USDA's Agricultural Marketing Service (AMS) on Tuesday cancelled a recent

solicitation for the procurement of process cheese.

Under that solicitation, USDA was seeking to buy a total of 3,960,000 pounds of process white sliced cheese, 6/5-pound loaves. AMS said the process cheese solicitation was cancelled per a request from USDA's Food and Nutrition Service (FNS).

USDA's Agricultural Marketing Service purchases a variety of domestically produced and processed commodity food products, through a competitive process among approved vendors. These purchases made by the AMS Commodity Procurement Program (CP) support US agriculture by encouraging the consumption of domestic foods.

AMS-CP manages the Web-Based Supply Chain Management (WBSCM), the fully integrated, web-based ordering and procurement system used for the purchase of USDA Foods.

Dairy products purchased by AMS-CP include cheese, fluid milk, yogurt, butter, UHT milk, evaporated milk, and instant non-fat dry milk.

For more information on selling dairy and other food products to USDA, visit www.ams.usda.gov/selling-food.



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