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Cheese Remains Top US Milkfat Use, Number Two Skim Solids Use

Fluid Milk Remains Leading User Of Skim Solids, But It Now Accounts For Less Than 20% Of Total

Washington—Last year, cheese remained by far the leading user of the US milkfat supply, while gaining ground on fluid milk as far as the use of skim solids is concerned, according to statistics released Monday by USDA's Economic Research Service (ERS).

Also in 2022, lower volumes of both milkfat and skim solids were used in fluid milk products than in 2021, and fluid milk products used lower percentages of both milkfat and skim solids than in 2021.

For this dataset, ERS provides seven tables for the supply and allocation of milkfat and skim solids by product: product volumes; milkfat supply and dairy industry allocation; skim-solids supply and dairy industry allocation; milkfat percent of total supply by product; skim-solids percent of total supply by product; milkfat content of products; and skim-solids content of products.

In 2022, the total US milkfat supply was a record 9.3 billion pounds. The milkfat supply includes the milkfat of domestic milk production plus the milkfat of imported dairy products assumed to be used as ingredients in domestically produced dairy products.

The US milkfat supply has increased by more than 3.1 billion pounds since 2000, when it totaled 6.19 billion pounds.

Cheese (other than cottage cheese) used 3.94 billion pounds of milkfat in 2022, up 85.8 million pounds from 2021. The volume of milkfat used to produce cheese has increased by more than 1.0 billion pounds since 2010, when it totaled 2.92 billion pounds.

In 2022, cheese used 42.3 percent of the total milkfat supply, unchanged from 2021 but up from 41.7 percent in 2020. More than 40 percent of the US milkfat supply has been used in cheese every year since 2009, including a record high of 42.8 percent in 2018.

The average milkfat content of cheese last year was 28.0 percent, up from 27.99 percent in 2021 and the highest average milkfat content since 2009 and 2008, when it was 28.12 percent.

Butter continued to be the second-largest milkfat user last year, although the 1.66 billion pounds of milkfat that was used to produce butter was down 3.2 million pounds from 2021. The volume of milkfat used to produce butter had reached a record high of 1.73 billion pounds in 2020, the same year in which US butter production reached a record high of 2.15 billion pounds.

As recently as 2001, less than 1.0 billion pounds of milkfat was used to produce butter.

Butter last year used 17.8 percent of the United States milkfat supply, down from 18.2 percent in 2021 and 19.5 percent in 2020.

Fluid beverage milk products last year used 950.0 million pounds of milkfat, down 12.1 million pounds from 2021 and the lowest volume of milkfat used in fluid milk products since 2014, when the milkfat volume totaled

• See **Milkfat & Solids Use,** p. 8

US Milk Production Fell 0.4% In Oct.; Output Fell In 3 Of Top 4 States

Washington—US milk production in the 24 reporting states during October totaled 17.9 billion pounds, down 0.4 percent from October 2022, USDA's National Agricultural Statistics Service (NASS) reported Monday.

September's milk production estimate was revised up by 17 million pounds from last month, so September milk output was up 0.1 percent from September 2022, rather than down slightly as initially estimated.

Production per cow in the 24 reporting states averaged 2,013 pounds for October, three pounds below October 2022.

The number of milk cows on farms in the 24 reporting states in October was 8.91 million head, 19,000 head less than October 2022, and 5,000 head less than September 2023.

For the US as a whole, October milk production totaled 18.7 billion pounds, down 0.5 percent from October 2022. Production per cow in the US averaged 1,997 pounds for October, one pound below October 2022. The number of milk cows on farms in the US in October was 9.37 million head, 42,000 head less than October 2022 and 6,000 head less than September 2023.

California's October milk production totaled 3.32 billion

• See **Milk Output Drops,** p. 6

Ending PA's Minimum Milk Pricing Wouldn't Help Dairy Farmers Or Milk Processors

Harrisburg, PA—Eliminating minimum milk pricing in Pennsylvania would create some "very modest benefits" for fluid milk consumers, would not increase dairy farm income, and would come with a "heavy price tag" of $2.8 billion in reduced-statewide economic activity according to a new study.

Economic Impact of Elimination of Pennsylvania's Minimum Milk Pricing System was prepared for the Pennsylvania Milk Marketing Board (PMMB) by Dr. Kenneth W. Bailey of Ken Bailey Dairy Consulting, LLC.

• See **Minimum Pricing,** p. 9

Digital Tool Gives Cheese Mongers Content, Tips To Slay Behind Counter

Madison—Cheese mongers and other industry affiliates have a new educational resource that provides information on everything from food science and the history of cheese, to retail best practices and ways to communicate subtle sensory attributes of cheese to customers.

Created by Dairy Farmers of Wisconsin (DFW), Cheese State University is a digital textbook, how-to manual, and a professional survival guide rolled into one, providing essential information and skills required to perform behind the cheese counter.

Enrollment is limited to cheese professionals, verified by student's email and job title.

The free program specifically arms cheese mongers and other cheese professionals with a broad scope of knowledge designed to make mongers more confident, able to answer questions at the counter, guide consumers through the tastes and smells of particular cheeses and finally, sell more products.

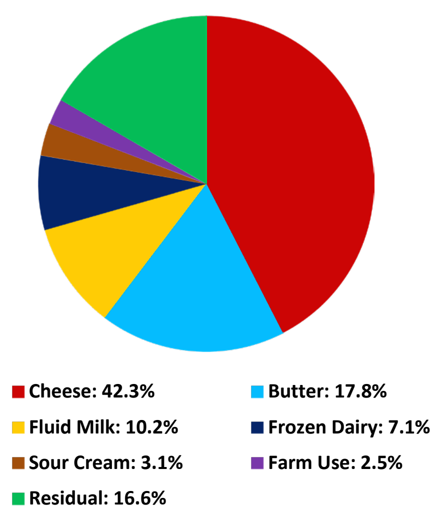
"Cheese State University is a three-volume, digital training tool that cheese mongers can use to explore the world of cheese from the very beginning – from the history of cheesemaking to the moment they put the cheese in the consumer's hand and it walks out the door," dean of mongers Molly Browne said.

The first volume kicks off with farming and dairy science – milk chemistry, the cheesemaking process, affinage – everything that happens to cheese before it arrives at retail, she said.

• See **Cheese University,** p. 4

Where US Milkfat Supply Was Used In 2022

Source: ERS



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EDITORIAL COMMENT

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it's at least somewhat possible that average retail Cheddar prices in the fourth quarter of 2023 will be lower then they were in the first quarter of 2013.

Retail Dairy Product Prices Looking Pretty Good These Days

Inflation continues to garner headlines and remains among the greatest concerns of many if not most consumers. But the good news from a dairy industry perspective is that inflation is turning out to be a one-year wonder, and stable if not somewhat lower retail dairy prices have recently become the rule rather than the exception.

There are several ways to illustrate this point. From a "big-picture" perspective, as reported on our front page last week, the Consumer Price Index for dairy and related products in October was 268.3 (1982-84=100), down 0.02 percent from September and down 0.4 percent from October 2022.

That last comparison is the key here. During 2022, the dairy CPI rose every month, from 238.7 in January to 271.4 in December. It continued to increase during the first two months of 2023, reaching a record high of 272.3 in February.

But the dairy CPI has been slowly declining since then, and has now been under 270 for five straight months. Granted, that's still very high — after all, the dairy CPI had never been above 240, 250, 260 or 270 until last year — but it's trending in the right direction, from a consumer perspective.

Further, among the four major food categories broken out by the US Bureau of Labor Statistics — dairy and related products; meats, poultry, fish, and eggs; cereals and bakery products; and fruits and vegetables — dairy is the only one that is lower than a year ago. Yes, October's CPI for meats, poultry, fish, and eggs was up only 0.4 percent from October 2022, but it was actually up 0.7 percent from September.

Also worth noting is that the CPIs for those other three categories are all over 300. In fact, the October CPIs for cereals and bakery products and for fruits and vegetables were over 350, while the CPI for meats, poultry, fish and eggs was 322.5.

Looking at some specific dairy product categories, October's CPI for cheese and related products was 266.4, which was up 0.5 percent from September but down 1.9 percent from October 2022.

Much like the dairy CPI, the cheese CPI topped a few milestones in 2022, reaching 250, 260 and 270 for the first time ever, and reaching a record high of 272.9 in December.

But while the cheese CPI remained above 270 in each of the first five months of 2023, it's been below that level for five straight months.

Meanwhile, average retail Cheddar cheese prices reached a record high of $6.08 per pound in September 2022, and were above $5.90 a pound in nine of the 12 months between August 2022 and July 2023. But they've now been under $5.90 a pound for three straight months and five of the last six months.

To put that in a bit of historic perspective, average retail Cheddar cheese prices reached a record high of $5.94 per pound back in February 2013, and that record stood until last August, when the average retail price reached $6.00 a pound (technically, $5.995 a pound).

Early 2013 was a pretty inflationary period for retail Cheddar prices, which averaged about $5.83 a pound during the first quarter of that year. Interestingly, during the third quarter of this year, retail Cheddar prices averaged $5.88 a pound, or just five cents higher than the first quarter of 2013.

At this rate, it's at least somewhat possible that average retail Cheddar prices in the fourth quarter of 2023 will be lower then they were in the first quarter of 2013.

Retail fluid milk prices are also trending in the right direction for consumers. Yes, the three fluid milk CPIs in October were all higher than they were in September, but they were all also lower than they were in October 2022.

For example, October's CPI for whole milk, at 251.8, was up 0.9 percent from September but down 2.2 percent from October 2022. Looking back at the whole milk CPI, it reached a then-record 252.2 in April of last year, and was above 260 five times last year, including in both November and December.

But the whole milk CPI has been below 260 every month this year, hasn't been above 255 since February, and was below 250 in July, August and September before rebounding in October.

Average retail whole milk prices were above $4.00 a gallon every month from May 2022 through May 2023, including a record high of $4.20 a gallon in January of this year. But they've now been below $4.00 a gallon for five straight months.

Also, and related to the point about historic Cheddar prices, the average retail price for a gallon of whole milk had reached a record high of $3.86 a gallon back in November of 2014, a record that was finally broken in February of 2022. And in October of 2023, the average retail whole milk price was less than seven cents higher than it was back in November of 2014.

Retail dairy product prices may never again get back to where they were a few years ago; in 2017, for example, retail Cheddar prices averaged under $5.00 a pound for eight straight months. But based on what's been happening in recent months, it might be a while before retail dairy product prices reach 2022 levels again. Dairy products continue to be a great bargain.

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Global Dairy Trade Price Index Unchanged; Product Prices Mixed

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

The last time the GDT price index was unchanged was the second auction in June. After that, the price index declined in four straight auctions, increased in four consecutive auctions, and then declined in the auction held two weeks ago.

In this week's auction, which featured 160 participating bidders and 117 winning bidders, prices were higher for whole milk powder, anhydrous milkfat and lactose; and lower for Cheddar cheese, skim milk powder, and butter. An average price for buttermilk powder wasn't available.

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

Cheddar cheese: The average winning price was $3,637 per metric ton ($1.65 per pound), down 9.7 percent. Average winning prices were: Contract 1 (December), $3,911 per ton, down 4.8 percent; Contract 2 (January 2024), $3,449 per ton down 14.7 percent; Contract 4 (March), $3,435 per ton, down 13.9 percent; Contract 5 (April), $4,033 per ton, down 1.3 percent; and Contract 6 (May), $4,048 per ton, up 6.3 percent.

Skim milk powder: The average winning price was $2,622 per ton ($1.19 per pound), down 3.8 percent. Average winning prices were: Contract 1, $2,615 per ton, down 7.5 percent; Contract 2, $2,596 per ton, down 3.4 percent; Contract 3 (February), $2,616 per ton, down 3.6 percent; Contract 4, $2,696 per ton, down 3.4 percent; and Contract 5, $2,737 per ton, down 3.5 percent.

Whole milk powder: The average winning price was $3,027 per ton ($1.37 per pound), up 1.9 percent. Average winning prices were: Contract 1, $2,615 per ton, down 7.5 percent; Contract 2, $2,596 per ton, down 3.4 percent; Contract 3, $2,616 per ton, down 3.6 percent; Contract 4, $2,696 per ton, down 3.4 percent; and Contract 5, $2,737 per ton, down 3.5 percent.

Butter: The average winning price was $4,833 per ton ($2.19 per pound), down 1.1 percent. Average winning prices were: Contract 1, $4,935 per ton, down 5.9 percent; Contract 2, $4,800 per ton, down 1.1 percent; Contract 3, $4,831 per ton, down 0.5 percent; Contract 4, $4,861 per ton, up 0.3 percent; Contract 5, $4,835 per ton, down 1.0 percent; and Contract 6, $4,885 per ton, down 0.1 percent.

Anhydrous milkfat: The average winning price was $5,544 per ton ($2.51 per pound), up 0.9 percent. Average winning prices were: Contract 1, $6,068 per ton, up 5.8 percent; Contract 2, $5,494 per ton, down 0.2 percent; Contract 3, $5,540 per ton, up 1.8 percent; Contract 4, $5,520 per ton, up 0.7 percent; Contract 5, $5,553 per ton, up 1.7 percent; and Contract 6, $5,577 per ton, up 0.6 percent.

Lactose: The average winning price was $750 per ton (34.0 cents per pound), up 6.4 percent. That was for Contract 2.

The increase in the average winning price for whole milk powder on this week's GDT auction was weaker than market expectations, according to Nathan Penny, senior agri economic at Westpac. The futures market had pointed to a WMP price rise of around 5 percent.

All up prices have softened a touch over November, after strong results over September and October, Penny noted. For example, whole milk powder prices fell 0.9 percent over the month from the end of October.

Dairy markets previously had been factoring in drought risk on the back of the El Nino weather pattern. In Westpac's view, this has been overdone and may explain the pullback in prices over November. 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.

New Zealand spring milk production has started on a farm note, with September production up 1.3 percent compared to September 2022, Penny pointed out.

Chinese demand is hinting at a pickup, Penny continued. Recent economic data have been more positive so this may translate into higher demand over time.

However, on balance, Westpac remains cautious. There have been both positive and negative developments since Westpac lifted its milk price forecast on Oct. 18, and these have largely canceled each other out.

With that in mind, Westpac has reaffirmed its milk price forecast for this season at $7.25 per kilogram of milk solids. Fonterra's forecast farmgate milk price for the 2023/24 season is $6.50 to $8.00 per kilogram of milk solids.

In other Global Dairy Trade news, NZ and SGX announced that they are making changes to the release timing of the Fonterra pre-event data for GDT auctions on *nzx.com*. The release timing of Fonterra pre-event data for GDT auctions will change from 10:02 a.m. UTC to 10:32, with effect from Thursday, Nov. 30, 2023.

Cheese University

(Continued from p. 1)

The second volume is dedicated to sensory aspects, communication techniques, pairings and usage suggestions.

"We tried to gear volume two as a way to help build confidence in cheese mongers to talk about cheese at the counter," Browne said. "How do they relay sensory attributes to consumers in a way that makes sense and makes them want to buy that cheese."

The third volume is dedicated to retail best practices – food safety, merchandising, promotions, how to set up a sampling display and all the way through, finally getting that cheese in the customer's hand.

"There was definitely some debate when we were putting this together; does a cheese monger need to know the global history of cheese in order to sell a pound of Cheddar to someone for their sandwich board," Browne said. "Arguably, maybe not, but cheese is such a dynamic product in a unique landscape of the grocery environment."

"Nobody's wanting to know the history of a box of Rice Crispies in the cereal aisle, but a cheese monger can be confronted with lots of rogue questions," she said. "Customers have an expectation that people know what they're talking about in that department."

"Every bit of information you're able to give a cheese monger will help them feel more comfortable and capable to do their job, answer those questions and really sell cheese," Browne said.

One thing I've learned across my entire career working with cheese mongers, is that these folks are hungry to learn. It's important for cheese mongers to understand how cheese is closely tied to agricultural systems and local legacy, she continued.

Cheese State Certification, Post Graduation Resources

The Cheese State University Field Guide and curriculum is geared to help participants earn the Cheese State Scholar Certificate.

Students are given a 30-question quiz and need answer at least 24 questions to earn certification.

The initiative had a soft launch in January, and currently has about 300 certified scholars.

The Cheese State Scholar Certificate isn't the American Cheese Society's (ACS) Certified Cheese Professional exam, it was structured using similar methodology.

"We didn't create it with the CCP in mind, but we acknowledge people will likely use it to study and benefit from it," Browne said. "This will give you the groundwork before diving into more complex topics and sophisticated ideas you'll encounter in the CCP exam."

Cheese State University also offers resources post-certification, with areas like the Library where visitors can find information such as the *Wisconsin Cheese Atlas.*

"You'd find anything you wanted to know in order to write a cheese card for the cheese case," Browne said. "Things like the name of the maker, where it's from, if it's raw or pasteurized, what awards has it won, and what are the sensory qualities," she said.

The site includes a video series call *The Turophiles – Counter Coaching for Cheese Mongers.* There are four episodes, with more to come.

"Someone could come up and say, 'Can you please explain rennet to me,' which can be a very daunting question," Browne said. "If you don't answer gracefully or knowledgably, it could turn people off."

"Recognizing there can be some dicey conversations in the cheese department, we wanted to show how a monger should approach theses conversations," and what's the background information they need to answer those questions credibly.

One example would be pregnancy and cheese – how do you advise a customer around safety issues specifically related to pregnancy, which can be a sensitive topic for some people, Browne said. What's the most direct and factual way to handle that conversation?

Another example is "Why is this Cheddar 40 dollars a pound," she continued. We're all used to hearing that in the cheese industry.

Another important space on campus is the *Pat Polowsky Student Union*, named after cheese educator and food scientist Pat Polowsky, who passed away Aug. 29, 2021 at the age of 29.

"He was a fabulous cheese educator, and dedicated much of his career to Wisconsin cheese, and helped us come up with the concept for Cheese State University," Browne said.

"He wrote a lot of drafts for the Field Guide, and was an instrumental part of what we were putting together here," she said.

The Student Union is a space were participants can find a wide variety of articles on different topics, Browne said. "I think of it more as monger lifestyle."

The *Finding Your Way* feature takes the unique paths that people have found for themselves in the cheese world, highlighting different career opportunities.

One of the most dynamic parts of the campus is the Cheese State University app, Browne said. It's intended to be a networking space, where content is updated almost daily.

"Cheese mongers need quick access to this information – how can we deliver that? Now a monger can go on break, open their phone and do a search for 'rennet,' accessing all the information we have on that," Browne continued.

In the *Retailer Spotlight*, retailers highlight the things that make them successful. It also features seasonal pairing content and gear reviews.

One of the greatest parts of the cheese industry is that people are willing to share, following the sentiment that a rising tide floats all boats.

For more information and enrollment, visit *www.cheesestateuniversity.com.*

FROM OUR ARCHIVES

50 YEARS AGO

Nov. 23, 1973: Washington—Dairy farmers producing milk have to spend more than $312 million to comply with proposed pollution control guidelines, USDA reported. Pollution controls will contribute to the rapid decline in the number of US dairy farms, and will increase consumer prices.

Washington—Dairy products, which for a time gained popularity as alternatives to high-priced, scarce meat products, are getting too expensive and losing favorable price position relative to other foods, Ohio State ag economics professor Robert Jacobson reported. High prices during low-production winter months will move shoppers to look for substitutes like dry milk from whole milk and cookies for ice cream.

25 YEARS AGO

Nov. 27, 1998: Appleton, WI—Look for Wisconsin's cheese production to continue to increase slightly during the next decade, and for California to increase its production at a much higher pace and overtake Wisconsin in total cheese production by 2008, WCMA executive director John Umhoefer said this week. He is also tracking Idaho's cheese industry, which accounts for 7 percent of total US production.

Gooding, ID—Officials at Avonmore West announced plans for $32 million worth of expansions and improvements at its cheese plant here. Improvements include upgrading equipment to manufacture 500-pound Cheddar barrels.

10 YEARS AGO

Nov. 22, 2013: Longueuil, Quebec—Agropur Cooperative announced the acquisition of Montreal-based M. Larivee International, Inc., a trading house specializing in dairy products and food ingredients.

Longueuil, Quebec—Agropur also announced this week plans to acquire the assets of Fromagerie Damafro, including those of Fromagerie Clement, located in St-Damase, Quebec. Damafro is a family-run business, and a Canadian leader in the production of Camembert and Brie.

Traceability Center Starts Work On Climate-Smart Dairy Grazing Project

Chicago—The Global Food Traceability Center (GFTC) has started working on the Dairy Grazing Apprenticeship (DGA) project "Implementing Precision Ag Tech to Expand the Participation of Small Grazing Dairy Farms in Climate-Smart Commodities."

The $4.77 million project, which will enable small dairy producers to access climate-smart grazing technology and engage in a climate-smart marketplace for their products, is part of the US Department of Agriculture's (USDA) Partnership for Climate-Smart Commodities.

The Dairy Grazing Apprenticeship, a nonprofit organization that administers a federally registered apprenticeship in managed grazing dairy production, is one of 71 projects selected for USDA's second pool of funding.

Part of the Institute of Food Technologists (IFT), the Global Food Traceability Center develops resources, tools, and training while offering customizable services to support industry, regulators, and NGOs in implementing end-to-end, event-based, interoperable traceability while also addressing supply chain challenges and creating opportunities.

The GFTC's work on the DGA-led project will include mapping farm-generated climate attributes and critical product traceability data into a data standard that can be used by farm-stage operators, downstream supply chains, and supporting technology partners.

"Managed dairy grazing is a tremendous tool to help mitigate greenhouse gas emissions compared to traditional management practices, but we cannot address carbon emissions in the dairy industry without a better way to capture, measure, and share this information from one end of the supply chain to the other," said Blake Harris, technical director of the GFTC.

"By creating a dairy-focused traceability standard that captures GHG attributes and by working closely with DGA and its other partners on this project, we can help enable real environmental change in the dairy industry," Harris added.

Additional partners in the project include Cedar Grove Cheese, Painterland Sisters, Uplands Cheese, Colorado State University, University of Missouri, and Taste Profit Marketing.

For more information on the GFTC, visit *www.ift.org/gftc*. For more information about DGA, visit *www.dga-national.org/*

USDA Urged To Rectify Disruptions In Milk Packaging Supply Chain

Washington—US Sen. Charles E. Schumer (D-NY) recently urged leadership of the US Department of Agriculture (USDA) to "address and rectify the looming disruptions in the milk packaging supply chain, specifically related to milk carton shortages."

Schumer, in a letter to US Secretary of Agriculture Tom Vilsack, said he's concerned that this disruption, "if it is not swiftly addressed, could have negative impacts on our farmers, school and child nutrition programs, and children, seniors, and others who depend on milk for nutrition."

Earlier this month, the New York State Department of Agriculture and Markets and the New York State Department of Education reiterated their actions and outreach to support the state's dairy industry and schools during the nationwide shortage of packaging paperboard.

The agencies 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 while the state continues to gather information on the shortage.

"I have heard from schools across New York state that have been forced to alter their milk deliveries, reduce milk varieties served, purchase bulk milk to serve in plastic cups with lids, or purchase drink dispensers to continue meeting students' nutritional needs," Schumer said in his letter to Vilsack. "While there is still plenty of milk for kids to drink, the milk carton shortage is expected to last several months and will continue disruption schools ability to adhere to federal nutrition standards."

USDA "is uniquely positioned to work with the dairy industry, our farmers, and schools to be able to address these shortages we are seeing nationwide and in New York," Schumer's letter continued.

He "strongly" urged USDA to work with dairy farmers and cooperatives in New York, and the New York State Department of Agriculture and Markets, to find packaging alternatives, bring together industry partners to determine what immediate actions can be taken to mitigate the impacts of a shortage and find creative solutions so farmers have a market for their product and milk doesn't go to waste.

Schumer also urged USDA to "afford maximum flexibility to our dairy farmers and co-ops and conduct outreach to ensure our farmers have all the technical assistance needed to ensure they can continue to provide milk to customers during this challenging time."

Also, given the potential downstream impacts of disruptions to the milk packaging supply chain, Schumer asked USDA "to investigate the causes of this carton shortage to determine how we can avoid further disruptions to our dairy farmers and any further steps we can be taking to mitigate problems of this nature in the future."

"Our 260 dairy farm families are encouraged by our team's efforts to continue to supply our milk to our school customers," said John T. Gould, president and chairman of the board of directors of Upstate Niagara Cooperative. "It has required hard work, coordination and cooperation to meet their needs. We thank Senator Schumer for his support in recognizing the critical importance of milk in the nutritional needs of children and adults."

Late last month, USDA's Food and Nutrition Service (FNS) issued a memorandum that provides state agencies with information about existing authority related to schools and other child nutrition program operators experiencing inadequate milk supplies. FNS encouraged state agencies to use existing authority when needed to support program operators impacted by the current milk packaging challenges.

Under current program regulations, state agencies may allow program operators experiencing milk supply shortages to serve meals during an emergency period with an alternate form of fluid milk or without fluid milk, the FNS memo stated.

Although program operators are expected to meet the 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 purchases of this flexibility, the memo continued.

Because this is an existing regulatory flexibility, a waiver is not required for state agencies to exercise this authority, the memo added. The memo reminded agencies that reviews should take into account any waivers or flexibilities that have been provided to program operators.

Milk Output Drops

(Continued from p. 1)

pounds, down 2.6 percent from October 2022, due to 10,000 fewer milk cows and 40 less pounds of milk per cow. California's September milk output had been down 1.8 percent from September 2022.

Wisconsin's October milk production totaled 2.69 billion pounds, up 0.9 percent from October 2022, due to 1,000 fewer milk cows but 20 more pounds of milk per cow. Wisconsin's September milk production was revised down by 6 million pounds, so output was up 0.9 percent from September 2022, rather than up 1.1 percent as initially estimated.

October milk production in Idaho totaled 1.384 billion pounds, down 1.4 percent from October 2022, due to 2,000 more milk cows but 35 less pounds of milk per cow. Idaho's September milk output was revised down by 7 million pounds, so production was down 1.2 percent from September 2022, rather than down 0.6 percent as originally estimated.

Milk production in Texas during October totaled 1.381 billion pounds, down 1.9 percent from October 2022, due to 20,000 fewer milk cows but 25 more pounds of milk per cow. Texas's September milk production had been down 1.0 percent from September 2022.

New York's October milk production totaled 1.35 billion pounds, up 2.1 percent from October 2022, due to 3,000 more milk cows and 35 more pounds of milk per cow. New York's September milk production was revised down by 6 million pounds, so output was up 1.6 percent from September 2022, rather than up 2.0 percent as initially estimated.

Michigan's production totaled 1.0 billion pounds, up 2.6 percent from October 2022, due to 11,000 more milk cows but unchanged milk per cow. Michigan's September milk output had been up 2.7 percent from September 2022.

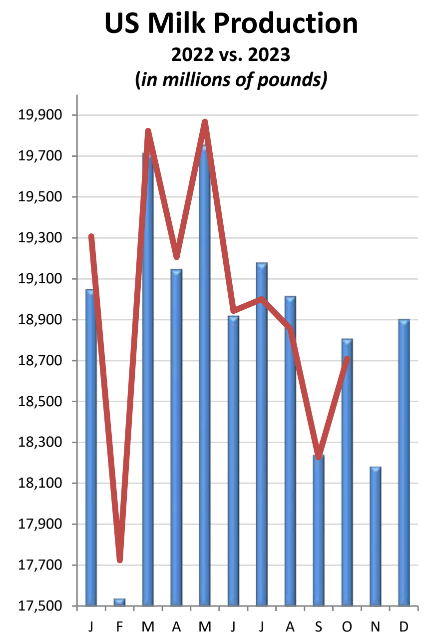
October milk production in Minnesota totaled 882 million pounds, up 0.3 percent from October 2022, due to 2,000 fewer milk cows but 15 more pounds of milk per cow. Minnesota's September milk production was revised up by 6 million pounds, so output was up 0.1 percent from September 2022, rather than down 0.6 percent as originally estimated.

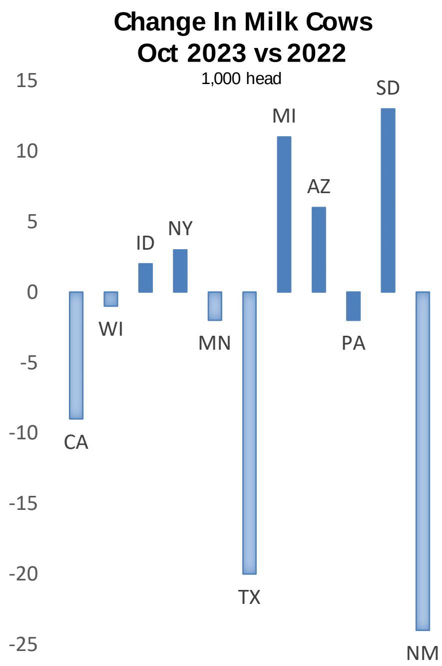
Pennsylvania's October milk production totaled 806 million pounds, down 0.5 percent from October 2022, due to 2,000 fewer milk cows but unchanged milk per cow. Pennsylvania's September milk production had been down 0.1 percent from September 2022.

New Mexico's milk production totaled 525 million pounds, down 9.0 percent from October 2022, due to 24,000 fewer milk cows and 10 less pounds of milk per cow. New Mexico's September milk output had been down 7.2 percent from September 2022.

Washington's milk production totaled 518 million pounds, down 0.4 percent from October 2022, due to unchanged milk cow numbers but 10 less pounds of milk per cow. Washington's September milk production was revised up by 2 million pounds, so output was down 0.8 percent from September 2022, rather than down 1.2 percent as initially estimated.

All told for the 24 states, compared to October 2022, milk production was higher in 12 states, with those increases ranging from 0.3 percent in Minnesota to 6.6 percent in South Dakota; lower in 10 states, with those declines ranging from 0.4 percent in Washington to 9.0 percent in New Mexico; and unchanged in Iowa and Utah.





Milk Production by State

STATE	Oct 2022 millions of lbs	Oct 2023	% output change	Change Cows
California	3405	3317	-2.6	-10000
Wisconsin	2669	2692	0.9	-1000
Idaho	1403	1384	-1.4	2000
Texas	1408	1381	-1.9	-20000
New York	1320	1348	2.1	3000
Michigan	984	1010	2.6	11000
Minnesota	879	882	0.3	-2000
Pennsylvania	810	806	-0.5	-2000
New Mexico	577	525	-9.0	-24000
Washington	520	518	-0.4	NC
Iowa	494	494	-	1000
Ohio	458	470	2.6	5000
Colorado	445	430	-3.4	-7000
Arizona	377	391	3.7	6000
South Dakota	362	386	6.6	14000
Indiana	368	377	2.4	5000
Kansas	353	348	-1.4	-2000
Oregon	218	209	-4.1	-4000
Vermont	212	209	-1.4	-1000
Utah	178	178	-	NC
Georgia	167	170	1.9	2000
Florida	146	155	6.2	6000
Illinois	137	138	0.7	NC
Virginia	115	118	2.6	NC

Many Bloggers Writing About Milk Alternatives For Kids Lack Medical Credentials

Washington—Parents of children under age five interested in alternatives to dairy milk are finding information online, and almost half of the most popular bloggers on this topic were neither dieticians or medical professionals, according to research presented during the 2023 AAP (American Academy of Pediatrics) National Conference & Exhibition here.

Researchers of the abstract, "Milk Mania: Analyzing Online Information and Perception regarding Milk Alternatives for Toddlers," studied the 145 most popular blogs for parents of children under age five on the topic of milk alternatives.

They found that while many parents are seeking information online about milk alternatives, 47 percent of the most popular bloggers on this topics were laypersons without medical training. Of the other bloggers, 32 percent were nutritionists or dieticians, 12 percent physicians or nurses, 5 percent holistic providers, and 4 percent PhDs and scientists.

"The large number of online blogs discussing dairy milk alternatives for toddlers suggests that this is an issue of great interest to caregivers, who may turn to blogs that provide unsupported information and nutritional recommendations about milk substitutes," said lead author Kara Sangiuolo, a medical student at Albert Einstein College of Medicine. "I think that there is a major opportunity for pediatricians and pediatric nutritionists to enter the online space and provide more accurate, consistent information to support caregivers looking to transition their toddlers away from dairy milk."

Of the popular blogs studied, bloggers were most likely to recommend soy milk (37 percent) and pea milk (17 percent) as the best milk alternatives, and the most common alternatives referenced were soy milk (84 percent), almond milk (79 percent), and rice milk (65 percent).

However, 14 blogs recommended making homemade milks for toddlers.

"The lack of consistent information across blogs was concerning, and only half of all blogs discussed the nutrient compositions of dairy milk alternatives," Sangiuolo said. "This reveals the need for greater dissemination of accurate nutritional recommendations regarding dairy milk alternatives from pediatricians and nutritionists."

Four Companies Named As Winners In CMAB's Milk Excelerator Competition

Tracy, CA—Startups Amazing Ice Cream, Arbo's Cheese Dip, Petit Pot and WonderCow claimed victory late last week at the fifth annual Real California Milk Excelerator Final Pitch Event.

Created by the California Milk Advisory Board (CMAB) and innovation advisory VentureFuel, the competition is designed to find, fund and accelerate innovation in dairy-based products, from consumer food and beverages to textiles and beyond.

The four cohort winners will each receive $30,000 in resources and funding to scale their products in California and will compete for an additional $100,000 in support based on continued performance over a period of one year.

Eight finalists participated in the live pitch event, where they presented to judges from companies representing retail, consumer packaged goods, food distribution and media before a live audience of key stakeholders.

The eight finalists were selected from a field of dozens of qualified entries and over the course of 12 weeks had access to a group stipend and a network of resources to refine and scale their product and business.

They also participated in the CMAB/VentureFuel Mentorship Program.

During the event, 2022 cohort members dosa by DOSA and Wheyward Spirit each unlocked $100,000 and $25,000 in additional funding after demonstrating their ability to grow their businesses in California over the past 12 months.

The event also featured a first-ever "Future of Dairy Expo" where attendees tasted and tested products from 15 industry startups, and a panel highlighting insights on the impact of dairy innovations on retail sales and consumer behavior.

"As the only non-CA-based brand selected for the Excelerator, I was humbled by the opportunity, and immediately felt like Arbo's Cheese Dip struck gold for being noticed and included. When I toured the Fiscalini Farmstead operation, it was the first time that I felt intimately what it takes for a dairy-based brand to be in business from beginning to end, and their work is no walk in the park," said Andrew Arbos, Founder & CEO of Arbo's Cheese Dip, which is based in Memphis, TN.

"California dairy farmers are focused on a cleaner, more sustainable future, but they need brands like us to support them. This is why I became so passionate about adding the Real California Milk seal, because it carries the real weight of what it takes to be innovative and sustainable," Arbos continued. "Being chosen as one of the winners, it is now my duty to support California farmers, so that we can collectively deliver the highest quality products nationwide."

"It is a great privilege and honor to be a part of the CMAB and VentureFuel Family," said Donald Anit, founder of Amazing Ice Cream. "Being able to see how California milk products are processed, from beginning to end, inspires us with an endless vision of avenues in the dairy industry. Meeting new processors, buyers and partners adds bountiful assets of growth to our business and the future of our company."

"We're truly humbled to be selected as a cohort winner among such a remarkable assembly of innovative companies. This recognition is a testament to the dedication and hard work of our team over the years," said Maxime Pouvreau, founder of Petit Pot.

"The timing of this prize couldn't have been more perfect, as we will be utilizing the funding to support Petit Pot's new paper cup desserts at Publix and Target," Pouvreau said. "We're looking forward to partnering with CMAB to drive awareness and affinity of our products and Real California Milk across the country."

"Being a part of the CMAB cohort has been a great experience for our WonderCow team," said Rob Diepersloot, founder of WonderCow. "We've met a lot of like-minded entrepreneurs, mentors, and industry leaders that we will continue to collaborate with as we grow our new company. It is these relationships and connections that will guide us as we take WonderCow to the next level.

"The California dairy industry has such an amazing story when it comes to innovation and sustainability, and we are extremely blessed to be a part of it," Diepersloot added.

"It was a close competition this year, with each cohort member bringing something interesting to the table. In the end, however, the four winners each had a solid product and a complete selling story that will connect with consumers," said John Talbot, CEO of the CMAB.

Milkfat & Solids Use

(Continued from p. 1)

949.4 million pounds. Last year was the 11th time in the last 12 years in which less than 1.0 billion pounds of milkfat was used in fluid milk products; the only exception during that period was in 2020, when just over 1.0 billion pounds of milkfat was used in fluid milk products.

Fluid milk products used 10.2 percent of the US milkfat supply, down from 10.6 percent in 2021 and the lowest level in this ERS data series that dates back to 2000.

The average milkfat content of fluid milk products last year was 2.19 percent, up from 2.16 percent in 2021 and the highest content in this ERS data series.

A total of 657.5 million pounds of milkfat was used in frozen dairy products last year, up 13.8 million pounds from 2021. Frozen dairy products used 7.1 percent of the US milkfat supply in 2022, unchanged from 2021.

The milkfat content of frozen dairy products was 9.40 percent, up from 9.28 percent in 2021.

In 2022 a total of 289.4 million pounds of milkfat was used to produce sour cream, up from 289.0 million pounds in 2021. Sour cream used 3.1 percent of the US milkfat supply last year, down from 3.2 percent in 2021.

The average milkfat content of sour cream in 2022 was 19.35 percent, unchanged from each of the previous 19 years.

Other dairy product categories and the volume and percentage of the US milkfat supply they used in 2022, was as follows: yogurt (nonfrozen), 73.1 million pounds, 0.8 percent; dry milk products (net), 56.5 million pounds, 0.6 percent; evaporated and condensed milk (net), 45.8 million pounds, 0.5 percent; whey products (net), 33.9 million pounds, 0.4 percent; and cottage cheese, 17.8 million pounds, 0.2 percent.

Also in 2022, 1.54 billion pounds of milkfat went to what ERS refers to as "residual" uses, up 130.9 million pounds from 2021. This category includes uses of products for which data are not readily available; any inaccuracies in production, utilization estimates, or conversion factors; and plant and shipping losses.

Leading Skim Solids Uses

The total US supply of skim solids in 2022 was 20.5 billion pounds, up 123.8 million pounds from 2021 and the third consecutive year in which the US skim solids supply topped 20 billion pounds.

The total skim solids supply includes the skim solids of US milk production plus the skim solids of imported dairy products assumed to be used as ingredients in US-produced dairy products.

Fluid milk remained the largest user of skim solids in 2022, although the volume of skim solids used in fluid milk products, 4.0 billion pounds, was down 89.3 million pounds from 2021. As recently as 2009, more than 5.0 billion pounds of skim solids was used in fluid milk products.

In 2022, fluid milk products used 19.5 percent of the total skim solids supply, down from 20.1 percent in 2021 and the first time ever that fluid milk products used less than 20 percent of the skim solids supply. As recently as 2001, fluid milk products used more than one-third (33.8 percent) of the total skim solids supply.

The average skim solids content of fluid milk was 9.20 percent, up from 9.18 percent in 2021.

Cheese was the second-largest user of skim solids at a record 3.96 billion pounds, up 72.1 million pounds from 2021. The volume of skim solids used to produce cheese has increased by more than 1.0 billion pounds since 2010.

Cheese used a record 19.3 percent of the US skim solids supply, up from 19.1 percent in 2021.The average skim solids content of cheese in 2022 was 28.17 percent, down from 28.26 percent in 2021.

In 2022, a total of 3.2 billion pounds of skim solids was used in whey products (net), down 59.4 million pounds from 2021. Whey products last year used 15.6 percent of the US skim solids supply, down from 16.0 percent in 2021.

The average skim solids content of whey products (net) in 2022 was 95.22 percent, down from 95.31 percent in 2021.

A total of 2.5 billion pounds of skim solids was used in dry milk products (net) in 2022, up 33.3 million pounds from 2021. Dry milk products used 12.3 percent of the US skim solids supply in 2022.

In 2022, the average skim solids content of dry milk products was 93.83 percent.

Last year, 709.3 million pounds of skim solids was used to produce yogurt (nonfrozen), down 13.7 million pounds from 2021. Yogurt used 3.5 percent of the skim solids supply, unchanged from 2021.

The average skim solids content of yogurt was 15.34 percent, up from 15.24 percent in 2021.

A total of 704.3 million pounds of skim solids was used to produce frozen dairy products in 2022, up 6.4 million pounds from 2021. Frozen dairy products used 3.4 percent of the skim milk supply last year, unchanged from 2021.

In 2022, the average skim solids content of frozen dairy products was 10.07 percent, up from 10.06 percent in 2021.

Other dairy product categories, and the volume and percentage of the US skim solids supply, were as follows: evaporated and condensed milk (net), 168.3 million pounds, 0.8 percent; sour cream, 113.4 million pounds, 0.6 percent; cottage cheese, 103.3 million pounds, 0.5 percent; and butter, 38.1 million pounds 0.2 percent.

Lallemand Specialty Cultures To Launch New Innovations For Cheese Makers

Blagnac, France—Lallemand Specialty Cultures (LSC) will introduce two new innovations for cheese makers at its booth at the Food Ingredients Europe 2023 exhibition, which will be held Nov. 28-30 in Frankfurt, Germany.

LALLEMAND

LALLEMAND SPECIALTY CULTURES

LSC will introduce what it describes as an innovative solution for washed-rind and smeared-rind cheese producers with FLAV-ANTAGE® BLB1, a strain of Brevibacterium aurantiacum from Lallemand's extensive cell bank. FLAV-ANTAGE® BLB1 represents LSC's latest innovation meeting specific market demands, providing a natural alternative for vibrant rind color and intense cheese flavor.

The innovation seamlessly integrates into LSC's existing FLAV-ANTAGE Brevibacterium aurantiacum range, offering several advantages, the company said, including: imparts specific rind colors, from creamy white to orange and brown; gives distinct surface appearances, from moist and sticky to dry and non-sticky; and enriches aroma and taste with or without coloration.

LCS will also introduce FLAV-ANTAGE® LN2, an aromatic Leuconostoc mesenteroides culture designed to optimize Blue cheese production.

It efficiently and robustly opens the curd, allowing optimal blue mold development, the company said.

Key features, according to LSC, include controlled gas production, uniform distribution, aromatic development, and pronounced blue color.

For more information, visit *www.lallemand.com.*

WIC Program Found To Be Vital To Well Being, But Is Also Underutilized

Washington—The Special Supplemental Nutrition Program for Women, Infants and Children (WIC) is vital to the health and well-being of nearly half of the country's babies, along with millions of young children and their mothers, but only about half of those eligible for the program in 2021 actually participated.

Specifically, recent research based on 2021 data published by USDA's Food and Nutrition Service (FNS) found that an average of 12.13 million mothers, babies and young children were eligible for WIC in 2021, but only 51 percent, or 6.21 million, of those who were eligible actually participated.

The WIC program provides nutritious foods, nutrition education, and referrals to health and social services. WIC serves low-income an dnutritionally at-risk pregnant, breastfeeding and non-breastfeeding postpartum women, infants, and children up to age five. Eligible participants receive electronic benefit transfer (EBT) cards for prescribed foods and redeem them at authorized retail vendors at no charge.

The foods provided through the WIC program are designed to supplement participants' diets with specific nutrients. WIC authorized foods include milk, cheese, yogurt, soy-based beverages, tofu, peanut butter, dried and canned beans/peas, canned fish, whole wheat and other whole-grain options, infant cereal, baby foods, iron-fortified adult cereal, fruits and vegetables, and eggs.

For infants of women who don't fully breastfeed, WIC provides iron-fortified infant formula. Special infant formulas and medical foods may also be provided if medically indicated.

In an average month in calendar year 2021, 12.1 million indviduals were eligible for WIC. Of those eligible to participate in WIC, almost two-thirds (65 percent) were children aged one to four, 20 percent were women, and 15 percent were infants, according to the report. Children eligible for WIC were evenly distributed by year of age.

Of the 12.1 million individuals eligible for WIC in an average month in 2021, a little more than half (6.2 million) received benefits, resulting in a national coverage rate of 51 percent. Across all participant categories, coverage rates were highest for infants (78 percent) and lowest for children and pregnant women (43 percent and 44 percent, respectively), the study noted.

Seven Northeast Dairy Businesses Get Processor R&D Innovation Grants

Montpelier, VT—Seven businesses across four Northeast states have been granted between $79,000 and $250,000 under the Northeast Dairy Business Innovation Center's (NE-DBIC) Dairy Processor Research and Development Grant program.

The grantees and their projects are as follows:

Cellars at Jasper Hill will act as a fiscal agent for contractor, Masterful Storytelling, Inc. This project,, in partnership with Plymouth Cheese, Vermont Farmstead Cheese Co., Cabot, and Grafton Village, will research best practices in order to create a pilot program of tourism for elite cheesemongers, chefs, and food critics to learn more about Vermont cheese and demonstrate the draw. Focusing on Cheddar, they will introduce three different events to test the market for cheese tourism.

Byrne Dewitt of New York will reformulate aseptic flavored milk to contain less added sugar, without compromising on consumer acceptability, to ensure that flavored milk remains an approved beverage for the National School Lunch Program.

Food Connects of Vermont, a non-profit food hub, will bring more dairy producers onto the Food Connects wholesale distribution platform, increase capacity to promote and sell more dairy products, and forge new and innovative supply chains within and beyond the Northeast, with an aim to continue expanding new markets for Northeast dairy producers.

Hawthorne Valley Farm of New York will work with a contractor and state of New York to develop innovative solutions for a water reclamation system as a part of its processing facility, advancing their mission to minimize waste and achieve a "zero-waste" campus.

Sidehill Farm of Massachusetts will pilot a comprehensive return/reuse system for 32-ounce stainless steel yogurt containers. This includes sourcing, customization, sealing, labeling, mechanical and process engineering, Food and Drug Administration (FDA) approval, customer uptake analysis, cost analysis, and lifecycle analysis. The project aims to determine the practicality of reusable stainless containers as an alternative to single-use plastic.

Miller Farm of Vermont in partnership with Windham Northeast Supervisory Union (WNESU), will transition, a minimum of three elementary schools and one high school from serving milk in cartons to local organic milk in bulk dispensers and establish a new scalable market model that will increase institutional demand for regional dairy products while simultaneously improving nutrition, food safety, and reducing waste in public schools.

Mountain Dairy of Connecticut will develop an ice cream production training curriculum, including an online certificate that incorporates expertise from two Extension programs. It will be available in Spanish and English and help dairy producers/processors expand their business while filling a resource gap in the industry.

Kory's Cheese Sales Finding Success Connecting Buyer/Seller Contacts

Omro, WI—Nearly a year ago, long-time industry cheese grader, Kory Hyvonen, decided to start Kory's Cheese Sales - a cheese brokerage company that would utilize his contacts and skills.

"I have been very fortunate to work at a few great places and with a few great people that would encourage me," Hyvonen said. "I was able to make connections with a lot of people with different functions within the industry. The industry knows what I do best and, likewise, I know what they do best as well."

Hyvonen has over 21 years of experience and is certified in grading American-styles cheeses, Swiss cheese, Brick, Muenster, and butter. He is also a licensed Wisconsin cheese maker.

In addition, Hyvonen's work as a regular judge of world, US, state and regional cheese contests has allowed him to meet people and establish key contacts with both buyers and sellers of cheese.

"Those are really fun experiences," Hyvonen said. "Judging hundreds of different styles all day with other judges and then getting to know them personally at night. This is a relationship industry and those contests will continue to be great way to build relationships."

One of the benefits of working with Kory's Cheese Sales, Hyvonen believes, is his knowledge and ability to care for the cheese.

"You can't have too many cheese experts in this industry," Hyvonen said. "With this new batch of manufacturers soon coming online, everyone is going to need more of that expertise."

He said cheese companies, both the suppliers and the buyers, either can't find enough quality assurance people for their operations, or don't have the time to train them.

"If they are not bringing that expertise up in their own companies, it's people like me, or the services I offer, that will be needed more."

The work he is doing are the many things manufacturers cannot or have the time to do properly, Hyvonen continued.

"Their focus is on throughputs and production, GMPs and quality," Hyvonen said. "When manufacturers are focused on that, as they need to be, they can't afford to work their own industry connections or work with buyers."

Hyvonen thinks the industry is changing pretty rapidly, and his knowledge and personal connections with both manufacturer and buyer can help bridge the needs of both segments.

"The industry is expanding quickly, with the new plants coming on line," Hyvonen said. "There will be a lot more product out there in the marketplace. It's going to get tougher for manufacturers to keep their hold on their customer base. It is going to be a little more competitive."

He said new plants can mean new problems but can also lead to new opportunities for manufacturers with a proven track-record of producing a high-quality, reliable cheese supply.

"Typically, for the buyer, the best place to go is directly to the cheese manufacturer," Hyvonen said. "But those relationships have been created over several years. If you are new to the industry, there are hoops that buyers need you to go through before a trusted relationship is formed."

Hyvonen believes a cheese expert will be needed to help "babysit" some of the new cheese coming online.

"Buyers right now are looking for consistency, functionally, reliability, and, of course, quality," Hyvonen said. "You may not see that for a while from some of these new, large, cheese operations coming online."

Whether that cheese maker is approved as a quality supplier may take time, Hyvonen said.

"These new plants might struggle with the consistency," Hyvonen said. "It's important for a converter to know what they are getting every time that box shows up in their production line. Getting into those streams, to have their product available for buyer programs, is a difficult task."

He said that there is a perception that price is the most important thing.

"The biggest problem for buyers is when they have to reject a product," Hyvonen said. "When there are quality issues, returns, cheese that slows down production, that's a bigger problem for the customer than whether or not it is five cents cheaper. They want it to work. They want a cheese that functions in their process. That's the biggest thing that buyers want."

Hyvonen said his skills as a cheese grader can help those new plants coming online.

"Being able to independently grade and evaluate the product, work with the cheese makers, work with them on how functional their product is, are what I can offer to these new plants."

Kory's Cheese Sales works for both buyers and manufacturers, Hyvonen said.

"I have those relationships with the manufacturers that not only do I know what products they offer, but also how they function throughout their lifetime," Hyvonen said.

Kory's Cheese Sales is focused on the customer, providing the one-on-one attention that makes problems go away, Hyvonen said.

"Basically I am the easy 'go-to person' that can use my contacts to move cheese from those with a need and those with excess product. To work hand in hand with customers to get them exactly what they want," Hyvonen said.

For information, contact Kory's Cheese Sales at 920-979-9885 or email, *kory@koryscheesesales.com*.

PERSONNEL

Marilyn Hershey Reelected DMI Chair; UDIA, NDB, NDC Elect Officers

Orlando, FL—Pennsylvania dairy farmer Marilyn Hershey was reelected chair of Dairy Management, Inc. (DMI) here last week.

Other DMI officers include vice chair, Mary Kraft, Colorado; secretary, Jim Reid, Michigan; and treasurer, Becky Nyman, California.

Officers for the National Dairy Promotion & Research Board (NDB) include chair, Joanna Shipp, Virginia; vice chair, Doug Carroll, Iowa; secretary, Lolly Lesher, Pennsylvania; and treasurer, Justin Leyendekker, California.

Members elected to serve on the United Dairy Industry Association (UDIA) board include chair, Alex Peterson, Missouri; first vice chair, Charles Krause, Minnesota; second vice chair, Audrey Donahoe, New York; secretary, Harold Howrigan, Vermont; and treasurer, Kris Wardin, Michigan.

Audrey Donahoe will also chair the National Dairy Council (NDC), along with vice chair, Arlene Vander Eyk, California; secretary, Jenni Tilton-Flood, Maine; and treasurer, Mike Ferguson, Mississippi.

ELAINE TREVINO has been named associate administrator in the **Foreign Agricultural Service (FAS)**. Trevino recently served in the Department of Transportation, working to improve the movement of US exports and imports with a focus on agriculture. Prior to working for the Biden administration, Trevino served on USDA's Agricultural Policy Advisory Committee. She also was deputy secretary at the California Department of Food & Agriculture for two governors, overseeing international export and trade programs.

RECOGNITION

NOLL'S DAIRY FARM of Alma, WI, is the **2023 Wisconsin Leopold Conservation Award** recipient. Owners Mark, Curtis, and Scott Noll and their families received the $10,000 award for going above and beyond in their management of soil health, water quality and wildlife habitat on working land. Since 1969, they have installed more than 20 earthen dams and erosion control structures to prevent gullies.

FAO Meeting Focuses On Cell-Based Food, Precision Fermentation

Shanghai, China—A stakeholder roundtable meeting held here earlier this month focused on the latest developments with cell-based food and precision fermentation.

The meeting, organized by the Food and Agriculture Organization (FAO) of the United Nations and the China National Center for Food Safety Risk Assessment (CFSA), featured 15 presenters sharing insights about their cell-based food or precision fermentation products, production processes and the strategies they have implemented to ensure food safety.

Cell-based food refers to products that are developed by culturing cells isolated from animals, while precision fermentation is a process that uses microorganisms to produce specific food compounds and ingredients, the FAO explained.

The meeting highlighted the key trends in cell-based food as of 2023, including the use of advanced bioreactors to facilitate scaling up, the development of low-cost food-grade media, and the availability of off-the-shelf approved inputs such as cell lines, scaffolds, and growth factors, among others.

Regarding precision fermentation, it was observed that this field is experiencing significant growth. Specifically, precision fermentation is now widely used for a variety of food additives and processing aids.

During the one-day meeting, a special session was held to focus on the topic of food safety dossier development for regulatory requirements.

Presenters who have experience in developing such dossiers shared their knowledge, such as what elements were contained in the documents, what food safety assessments were conducted and how the relevant data were presented in the dossiers.

While regulatory processes and requirements among different countries and jurisdictions can significantly vary, essential food safety considerations can be common among competent authorities.

Some regulatory agencies offer informal pre-submission consultation opportunities for companies with specific questions, and such consultation sessions have been found useful for both regulators and industry to achieve positive overall outcomes to ensure food safety, according to meeting participants.

Minimum Pricing

(Continued from p. 1)

The objective of the report is to present results of a study on the economic impact of eliminating Pennsylvania's minimum milk pricing structure. More specifically, it explores what would happen if the Pennsylvania Milk Marketing Board (PMMB) no longer set: minimum farm milk prices; an over-order premium on Class I milk produced, processed and sold in the state; and minimum wholesale and retail prices.

Pennsylvania is a unique dairy state in that it has a large popuation of close to 13 million, is ranked as a top 10 milk-producing state, and is ranked number two in terms of the number of dairy farmers, the study noted.

Also, the report added, Pennsylvania is unique in terms of the number and size of dairy processors in the state. For example, in 2023, the PMMB reported there were 41 licensed fluid milk processors in the state, six of which were cooperative-owned fluid processing plants. Other similar-sized states have fewer but larger fluid milk plants.

Among the questions addressed in the study: Would Pennsylvania consumers buy more milk if the state's minimum milk pricing structure was eliminated? The answer is yes, but the increase in consumption shown in the study's results was "very modest."

More specifically, the retail price of milk in Pennsylvania would decline 5.2 to 8.3 percent from the baseline if minimum pricing were eliminated, but fluid milk consumption in the state would increase by only about 1.3 percent per year. That's due in part to the fact that fluid milk demand is highly inelastic, which means that changes in retail prices have very little impact on consumption.

If the state's minimum milk pricing structure was eliminated, retail outlets would engage in bidding wars, the study stated. Many US retailers use milk as a "loss leader" to drive traffic to their stores and maximum sales.

If minimum milk pricing in Pennsylvania is eliminated and retailers no longer have a floor on their retail prices, they would engage in competitive bidding between fluid milk suppliers (processors/dealers), the study said. Aggressive bidding would create pressure on fluid milk processors to lower their costs (and margins).

Elimination of minimum milk pricing in Pennsylvania and an initiation of bidding wars between retailers and fluid milk processors/dealers would have a "significant impact" on fluid milk processing capacity in the state, according to the study.

Specifically, roughly 57 percent of dealers and 66 percent of the volume of fluid milk processing in the state would be vulnerable to bankruptcy. The study values this loss at $542 million from fluid processing, $138 million from lost cream processing, and $37 million from lost sour cream processing.

A direct economic loss of $717 million by fluid processors/dealers in Pennsylvania would have negative indirect economic impacts on dairy farmers, rural communities, and other businesses, the study continued.

The study estimated that dairy farmers would lose $182 million if 66 percent of the volume of fluid milk processing is lost due to bankruptcy caused by the elimination of minimum milk pricing. The state's dairy farmers would lose over-order premiums ($18 million), some would face higher hauling costs ($1.1 million), and some would reduce their milk supply and lose markets entirely.

This would result in less economic activity for local communities and businesses, but "that is only the tip of the iceberg," the study stated.The loss in fluid milk processing in Pennsylvania of $717 million would result in an indirect or supplier loss to agriculture of $364 million.

The broader category of "agriculture" includes not just milk production but also dairy cattle, feed, etc. And there would be other losses in rural communities; indirect losses on transportation, communication, mining, construction, manufacturing, finance, insurance, real estate, travel and entertainment, business and personal services, and government would total $934 million.

As far as how Pennsylvania's dairy industry would be impacted by the elimination of minimum milk pricing, "the structure of the Pennsylvania dairy industry would undoubtedly change drastically," the study said. Fluid milk processors would no longer be able to pay their farm milk suppliers an over-order premium above minimum federal order prices. There would be less milk production and fewer dairy farmers as the industry contracts, and less economic activity in rural communities.

Including direct, indirect, and induced effects, the study found that the total statewide impact of eliminating minimum milk pricing in Pennsylvania would be a total economic loss of $2.8 billion, lost wages of $683 million, and lost jobs of 10,047. Business taxes totaling $146.8 million for federal and $115.3 million for the state would also be lost.

PLANNING GUIDE

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

•

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

•

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

•

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

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

•

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

•

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

•

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

Speaker Lineup Released For ADPI's New Global Dairy Ingredient Summit

Reno, NV—The American Dairy Products Institute (ADPI) released new details for its Global Ingredients Summit here March 11-13 at the Peppermill Reno Resort.

The new event combines two of ADPI's technical conferences – the Global Cheese Technology Forum and the Dairy Ingredients Technical Symposium.

Participants will hear the latest research and technology developments for cheese, milk, and whey ingredients, bringing together members of industry and academia for future innovation.

Afternoon concurrent sessions will feature separate cheese and milk/whey ingredients tracks.

Sessions will cover emerging technologies in processing, ingredient customization, applications, health and wellness, sustainability, and regulatory concerns.

The speaker lineup includes Jayendra Amamcharla, University of Minnesota Midwest Dairy Foods Research Center; Zeynep Atamer and Paul Hughes, Oregon State University; David Barbano and Nicole Helen Martin, Cornell University; ADPI's KJ Burrington and Andy Powers; Maryanne Drake and Haotian Zheng, North Carolina State University; Federico Harte, Penn State University; Mitch Kanter, Global Dairy Platform; Sylvain Moineau, Universite Laval; Vikki Nicholson-West, USDEC; Gulustan Ozturk, University of Wisconsin-Madison; Prafulla Salunke, South Dakota State University; Prateek Sharma, Utah State University; Moises Torres Gonzalez, National Dairy Council; and Emily Vernon of RTI International.

The preliminary schedule begins with a welcome reception Monday evening.

On Tuesday, speakers will look at the future of global milk supply and pricing; technologies; exports, health and wellness.

Tuesday will feature a panel discussion on sustainability in manufacturing, followed by the Student Research Competition. A cheese track will look at advancements in microbiology. The dairy ingredients track will cover emerging technologies in the areas of functionality and applications.

The final day of the summit will look at the evolving world of data science, and a panel discussion on biotechnology in the dairy sector.

The cheese track focus on functionality, health and wellness. The dairy ingredients track will also cover health and wellness, along with co-product utilization.

Early registration ends Dec. 31, 2023. Fees prior to the deadline are $449 for ADPI members and $645 for non-members. Tickets for members of government and academia are $399, and discounted student tickets are $99 per person.

For details and to register online, visit *www.adpi.org/events*.

Enrollment Open For Dairy Ingredients 360 Spring Training; Now Offered Twice

Elmhurst, IL—The American Dairy Products Association (ADPI) has opened enrollment for its online Dairy Ingredients 360 Training Course for spring 2024.

ADPI will offer the course for the 2024 fall semester, from September through November.

Students receive 36 hours of material split over three modules. Content, hours and instructors remain the same, and the course will be delivered on-demand, featuring quizzes and live question-answer sessions with instructors at the end of each module.

Instruction serves as an opportunity to train new employees, serve as a refresher, or gain a deeper understanding on topics like milk quality and composition, processing basics, ingredient functionality, applications, and nutrition, ADPI noted. Students will also learn about pricing, markets, risk management, supply chain, sustainability, and exports.

Module 1 will specifically focus on the origin, composition, processes and basic properties of dairy ingredients, with a live question-answer session on Feb. 28.

Module 2 covers functionality, use and application, with the instructor session on March 27.

Module 3 will teach students how to address a competitive marketplace, with a live session on April 24.

The fee for full enrollment is $1,750 for ADPI members and $2,275 for non-members. Cost for university and government staff is $1,250 and the discounted rate for graduate students is $750.

Individual course registration modules costs $750. Registration can be found at *www.adpi.org*.

For questions, contact ADPI vice president of technical development KJ Burrington at (630) 530-8700 x 225 or via email: *kburrington@adpi.org*.

Chapman University Will Host Science And Art Of Milk In Beverages Program

Orange, CA—The California Milk Advisory Board (CMAB) and Chapman University have teamed up for a special workshop on Coffee, Tea, and Creamers: The Science & Art of Milk in Beverages.

The two-day workshop will be held here Jan. 16-17, 2024 at the Keck Center for Science & Engineering on campus.

Industry experts will share methods of formulating coffee and tea beverages with milk, along with processing techniques to create ready-to-drink refrigerated, aseptic and shelf-stable products.

The course is designed to benefit entrepreneurs, students, and industry professionals in the areas of production, quality assurance and marketing in the food processing, foodservice and distribution sectors.

It features hands-on activities, demonstrations and extensive question-answer time with formulation experts.

Sessions on milk fundamentals, heat stability of milk beverages, and the processing and shelf-life of dairy-based RTD coffee and tea beverages will be led by Cal Poly professor emeritus Phillip Tong.

The instructor lineup also includes Matthew Swenson, Nestlé; Justin Demers, Prova US; Wanda Jurlina, IMCD US Food, Inc.; Richard Stewart, Ingredion, Inc.; Zafir Gaygadzhiev, ICL Group; Sophia Pollack, Sovereign Flavors, Inc.; Mailyne Park, Torani; Sarah Merritt, Westrock Coffee Company; and Chapman University's Luu Hoang.

Students will explore the various coffee and tea products trending globally, understand how brewing techniques impact coffee flavor, and discover various types of milk and milk ingredients available.

Participants will also learn how to optimize milk ingredient performance in a variety of tea and coffee beverages.

Teachers will cover various factors important for shelf life and stability of dairy-based beverages, and the role of various ingredients used to stabilize dairy-based coffee and tea beverages.

They will also cover the interactions of dairy ingredients with flavors and sweeteners, and demonstrate how to optimize formulations by knowing the difference between coffee essences, concentrates, and single-strength coffee extracts.

Students will likewise be taught various processing methods that assure food safety and shelf-life, and optimize quality.

The two-day workshop will wrap with a Latte Art Throwdown/Cold Foam hands-on activity.

The early registration deadline is Dec. 1. Cost to attend prior to the deadline is $600 per person and $650 after Dec. 1. Discounts are available for students, academics and coffee shop personnel.

For full details and online signup, visit *www.chapman.edu/scst/graduate/ms-food-science/milk-in-beverages-course*.

MARKET PLACE

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Real Estate

DAIRY PLANTS FOR SALE: https://dairyassets.weebly.com/m--a.html. Contact Jim at 608-835-7705; or by email at **jimcisler7@gmail.com**

Walls & Ceiling

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Events

Warehousing & Storage

COLD STORAGE SPACE AVAILABLE: Sugar River Cold Storage in Monticello, WI. has space available in it's refrigerated buildings. Temperature's are 36, 35 and 33 degrees. Sugar River Cold Storage is SQF Certified and works within your schedule. Contact Kody at 608-938-1377. or, for information including new services, visit Sugar River's website at **www.sugarrivercoldstorage.com.**

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PROMOTE YOURSELF - By contacting **Tom Sloan & Associates.** Job enhancement thru results oriented professionals. We place cheese makers, production, technical, maintenance, engineering and sales management people. Contact Dairy Specialist David Sloan, Tom Sloan or Terri Sherman. **TOM SLOAN & ASSOCIATES, INC.,** PO Box 50, Watertown, WI 53094. Phone: (920) 261-8890 or FAX: (920) 261-6357; or by email: tsloan@tsloan.com.

Positions Wanted

Cheese & Dairy Products

KEYS MANUFACTURING: Dehydrators of scrap cheese for the animal feed industry. Contact us for your scrap at (217) 465-4001 or e-mail: ***keysmfg@aol.com***

Hard-To-Find Items

Federal Order Class 1 Minimum Prices & Other Advanced Prices - December 2023

Class I Base Price (3.5%)	$19.76 (cwt)
Base Skim Milk Price for Class I	$7.95 (cwt)
Advanced Class III Skim Milk Pricing Factor	$5.34 (cwt)
Advanced Class IV Skim Milk Pricing Factor	$9.08 (cwt)
Advanced Butterfat Pricing Factor	$3.4526 (lb.)
Class II Skim Milk Price	$9.78 (cwt)
Class II Nonfat Solids Price	$1.0867 (lb.)
Two-week Product Price Averages:	
Butter	$3.0225 lb.
Nonfat Dry Milk	$1.1868 lb.
Cheese	$1.7486 lb.
Cheese, US 40-pound blocks	$1.7618 lb.
Cheese, US 500-pound barrels	$1.7068 lb.
Dry Whey	$0.3869 lb.

HISTORICAL MILK PRICES - CLASS I

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
'15	18.58	16.24	15.56	15.50	15.83	16.14	16.53	16.25	16.34	15.84	16.48	16.71
'16	16.04	13.64	13.78	13.74	13.70	13.14	13.70	15.07	16.56	16.60	14.78	16.88
'17	17.45	16.73	16.90	16.05	15.20	15.31	16.59	16.72	16.71	16.44	16.41	16.88
'18	15.44	14.25	13.36	14.10	14.44	15.25	15.36	14.15	14.85	16.33	15.52	15.05
'19	15.12	15.30	15.98	15.76	16.42	17.07	17.18	17.89	17.85	17.84	18.14	19.33
'20	19.01	17.55	17.46	16.64	12.95	11.42	16.56	19.78	18.44	15.20	18.04	19.87
'21	15.14	15.54	15.20	15.51	17.10	18.29	17.42	16.90	16.59	17.08	17.98	19.17
'22	19.71	21.64	22.88	24.38	25.45	25.87	25.87	25.13	23.62	22.71	24.09	22.58
'23	22.41	20.78	18.99	18.85	19.57	18.01	17.32	16.62	18.90	19.47	19.75	19.76

Dairy Product Stocks in Cold Storage

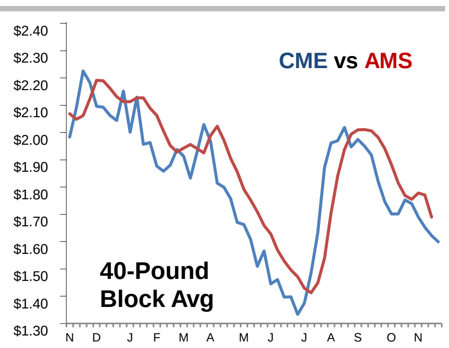
TOTAL STOCKS AS REPORTED BY USDA (in 1000s of pounds unless indicated)

	Stocks in All Warehouses			October 31, 2023 as a % of		Public Warehouse Stocks
	Oct 31 2022	**Sept 30 2023**	**Oct 31 2023**	**Oct 31 2022**	**Sept 30 2023**	**Oct 31 2023**
Butter	239,666	266,635	238,283	99	89	217,928
Cheese						
American	831,191	851,186	838,346	101	98	
Swiss	21,947	21,828	21,212	97	97	
Other	594,933	610,620	605,204	102	99	
Total	1,448,071	1,483,634	1,464,762	101	99	1,128,508

DAIRY PRODUCT SALES

Nov. 22, 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. 18	Nov. 11	Nov. 4	Oct. 28
40-Pound Block Cheddar Cheese Prices and Sales				
Weighted Price		Dollars/Pound		
US	1.7530	1.7709	1.7780	1.7551
Sales Volume		Pounds		
US	12,551,943	12,105,148•	12,637	11,807,364
500-Pound Barrel Cheddar Cheese Prices, Sales & Moisture Contest				
Weighted Price		Dollars/Pound		
US	1.7839	1.8129	1.8048	1.7565
Adjusted to 38% Moisture				
US	1.6924	1.7244	1.7168	1.6741
Sales Volume		Pounds		
US	15,156,380	12,475,664	11,747,863	13,035,507
Weighted Moisture Content		Percent		
US	34.65	34.82	34.95	34.91
AA Butter				
Weighted Price		Dollars/Pound		
US	2.8563	3.1518•	3.2554	3.2878
Sales Volume		Pounds		
US	2,610,145	3,356,668	3,393,965	3,053,552
Extra Grade Dry Whey Prices				
Weighted Price		Dollars/Pound		
US	0.3906	0.3828	0.3554	0.3403
Sales Volume				
US	6,312,626	5,735,264	4,678,419	6,936,345
Extra Grade or USPHS Grade A Nonfat Dry Milk				
Average Price		Dollars/Pound		
US	1.1924	1.1816•	1.1757	1.1726•
Sales Volume		Pounds		
US	13,974,788	14,838,885•	18,718,723•	16,520,367•

DAIRY FUTURES PRICES

SETTLING PRICE *Cash Settled

Date	Month	Class III	Class IV	Dry Whey	NDM	Block Cheese	Cheese*	Butter*
11-17	Nov 23	17.13	20.60	37.600	118.575	1.750	1.7450	295.000
11-20	Nov 23	17.13	20.60	37.600	118.775	1.750	1.7440	295.000
11-21	Nov 23	17.12	20.60	37.600	118.775	1.750	1.7440	294.975
11-22	Nov 23	17.13	20.60	37.600	118.800	1.750	1.7440	294.975
11-23	Nov 23	—	—	—	—	—	—	—
11-17	Dec 23	16.64	19.16	40.750	120.700	1.701	1.6990	257.500
11-20	Dec 23	16.38	19.16	39.750	120.900	1.700	1.6770	254.000
11-21	Dec 23	16.40	19.04	39.725	119.000	1.700	1.6780	253.000
11-22	Dec 23	16.35	18.93	39.650	119.500	1.700	1.6790	253.500
11-23	Dec 23	—	—	—	—	—	—	—
11-17	Jan 24	16.79	18.73	43.500	122.475	1.749	1.7020	245.550
11-20	Jan 24	16.53	18.65	42.500	122.725	1.735	1.6810	244.000
11-21	Jan 24	16.52	18.65	42.000	120.750	1.735	1.6890	245.800
11-22	Jan 24	16.44	18.65	41.900	120.775	1.720	1.6780	246.000
11-23	Jan 24	—	—	—	—	—	—	—
11-17	Feb 24	17.25	18.93	43.750	124.700	1.797	1.7500	246.000
11-20	Feb 24	17.05	18.85	42.950	124.800	1.770	1.7320	245.250
11-21	Feb 24	17.05	18.87	42.000	122.750	1.770	1.7380	246.525
11-22	Feb 24	16.98	18.78	41.625	122.500	1.770	1.7290	247.000
11-23	Feb 24	—	—	—	—	—	—	—
11-17	Mar 24	17.80	19.16	44.000	126.350	1.840	1.8000	248.975
11-20	Mar 24	17.66	19.04	43.500	126.550	1.800	1.7940	246.250
11-21	Mar 24	17.71	19.03	42.950	124.625	1.800	1.8000	247.525
11-22	Mar 24	17.62	19.03	42.950	124.525	1.800	1.7950	247.550
11-23	Mar 24	—	—	—	—	—	—	—
11-17	April 24	18.06	19.32	44.400	127.950	1.872	1.8300	248.000
11-20	April 24	17.98	19.30	44.400	128.500	1.866	1.8210	247.500
11-21	April 24	17.90	19.29	44.400	126.700	1.866	1.8210	247.525
11-22	April 24	17.90	19.29	44.000	126.750	1.866	1.8210	248.000
11-23	April 24	—	—	—	—	—	—	—
11-17	May 24	18.20	19.52	46.000	129.850	1.889	1.8400	247.500
11-20	May 24	18.10	19.50	46.000	130.775	1.875	1.8380	247.500
11-21	May 24	18.09	19.49	46.000	129.000	1.875	1.8360	248.000
11-22	May 24	18.05	19.49	46.000	129.500	1.875	1.8360	248.500
11-23	May 24	—	—	—	—	—	—	—
11-17	June 24	18.35	19.60	47.000	132.000	1.899	1.8580	247.000
11-20	June 24	18.30	19.60	47.000	132.750	1.892	1.8500	247.000
11-21	June 24	18.26	19.53	47.000	130.750	1.892	1.8520	249.500
11-22	June 24	18.26	19.53	47.000	131.900	1.892	1.8550	249.150
11-23	June 24	—	—	—	—	—	—	—
11-17	July 24	18.50	19.77	47.025	134.100	1.925	1.8720	248.500
11-20	July 24	18.49	19.77	47.025	134.125	1.919	1.8690	248.500
11-21	July 24	18.42	19.69	47.000	133.500	1.919	1.8680	249.500
11-22	July 24	18.48	19.61	47.000	134.000	1.919	1.8770	249.500
11-23	July 24	—	—	—	—	—	—	—
11-17	Aug 24	18.65	19.81	47.000	135.000	1.935	1.8810	249.000
11-20	Aug 24	18.65	19.81	47.000	135.525	1.928	1.8770	248.525
11-21	Aug 24	18.64	19.81	47.000	135.000	1.928	1.8770	249.500
11-22	Aug 24	18.60	19.75	47.000	135.000	1.926	1.8840	249.500
11-23	Aug 24	—	—	—	—	—	—	—
11-17	Sept 24	18.58	19.88	47.000	137.975	1.937	1.8880	249.500
11-20	Sept 24	18.75	19.94	47.000	137.000	1.937	1.8850	249.500
11-21	Sept 24	18.74	19.94	47.000	137.000	1.937	1.8860	250.000
11-22	Sept 24	18.70	19.85	47.000	137.000	1.933	1.8890	250.000
11-23	Sept 24	—	—	—	—	—	—	—
Nov. 22		23,973	7,817	2,783	9,482	2,616	19,671	9,639

DAIRY PRODUCT MARKETS

AS REPORTED BY THE US DEPARTMENT OF AGRICULTURE

WHOLESALE CHEESE MARKETS

NATIONAL - NOV. 17 : Steady milk volumes are clearing into Class III operation in the eastern region. Cheese production is steady in the East and Cheddar continues to be the most in-demand American-type cheese. Demand is steady on the retail front. Spot milk availability remains somewhat tight in the Midwest with spot milk prices hovering around $1-over Class. Nonfat dry milk usage in cheese processing has increased as a result of limited spot milk offers ahead of the holiday week. Midwest cheese demand is steady to stronger. In the West, cheese makers are operating steady production schedules. Retail demand is steady to stronger. Across the country, demand from the foodservice sector has dwindled as high menu prices have deterred customers. Contacts relay domestically produced cheese loads carry a premium price over internationally produced loads, causing light export demand.

NORTHEAST - NOV. 21: Milk volumes remain strong in the East. Steady milk volumes continue to clear into Class III processing. Cheese plant managers report steady production schedules aside from scheduled time off for Thanksgiving. Cheese inventories are steady to stronger, and demand is mixed. Retail cheese demand is stronger than in recent weeks due to consumers purchasing for Thanksgiving. Foodservice demand is down over last month as customers are deterred by high menu prices as well as restaurant downtime due to the holiday. Cheddar is noted to be the most in-demand American-type cheese.

MIDWEST AREA - NOV. 21: Besides cheese curd processors, who relay this is their quieter season, most cheesemaking contacts in the region say demand is steady to hearty moving into the the fall/winter holiday season. Recently bearish market prices have customers less hesitant to purchase beyond a hand-to-mouth basis. The spot milk market, despite some unknowns coming into the holiday week, did open up somewhat before the holiday. Plant contacts say downtime has kept milk available, as spot milk prices were reported below Class for the first time in months. Spot prices, on Tuesday, have been reported as low as $2.50 below Class III. That said, there were still some spot prices recorded at $.25 over Class. Generally, regional cheese manufacturers say milk and processing are somewhat balanced. Last year, during week 47, spot prices ranged from $4.50 under to $.25 over Class.

WEST - NOV. 21: Cheese manufacturers and distributors relay mostly steady retail demand for varietal cheeses in the West. Foodservice demand is noted as steady to moderate by manufacturers and distributors. Restaurant traffic is down compared to a year ago according to industry sources, as rising menu costs have impacted restaurant goers' willingness to dine out. Stakeholders say varietal cheese inventories are comfortable and loads are available. That said, a few manufacturers report spot load availability for buyers is somewhat tight. Demand from international purchasers is moderate to light. Class III milk demand is strong to steady, but some cheese producers say spot load availability is tight, making production schedules mostly steady.

FOREIGN -TYPE CHEESE - NOV. 21: Cheese sales are strong in Europe from both retail and foodservice purchasers. Industry sources indicate retail cheese promotions are positively impacting grocery store sales in the region. Current cheese prices in Europe are having a negative impact on export demand as some international cheese purchasers are, reportedly, becoming more hesitant to purchase loads. European milk output is softening, following seasonal trends, and cheese makers say this is negatively impacting production. Furthermore, some cheese makers in Europe say high input costs are causing them to run lighter production schedules. European cheese demand is outpacing production and inventories remain tight. Some stakeholders in the region say they are unable to fulfill orders from spot purchasers looking for additional loads of cheese.

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

Variety	Date: 11/22	11/15	Variety	Date: 11/22	11/15
Cheddar Curd	$2.00	$1.96	Mild Cheddar	$1.98	$1.94
Young Gouda	$2.06	$2.02	Mozzarella	$1.83	$1.78

WHOLESALE BUTTER MARKETS - NOVEMBER 21

NATIONAL: Cream availability is increasing across all regions. Butter price on industry cash exchanges continue to fall to levels not seen since midsummer. In the East, butter production is limited as many processors report micro-fixing to keep inventories under control through the end of the year. Butter processors in the Central region are also opting to micro-fix for the same reason. In the West, processors are utilizing some additional cream to operate stronger production schedules than in recent weeks. Some plant managers say they have started to shift production focus from retail towards bulk butter, especially as cream prices remain lower than in recent weeks.

CENTRAL: Thanksgiving week has continued to, as expected, open up cream supplies for butter production. Reported multiples are holding in the mid/upper 1.10s for Class IV production. However, butter plant contacts relay churning is not necessarily heavy. Plant schedules still involve more micro-fixing than during a normal holiday time-frame with abundant cream supplies. Butter makers say they are hesitant to add to the churns. As recent butter market tones have met some precipitous bearish pressure, suppliers are hesitant to add to their inventories, particularly at the end of the year. That said, some contacts say markets are expected to hold around where they have been this week, around $2.50/lb.

NORTHEAST: Butter prices on industry cash exchanges continue to mirror lows not seen since July 2023. As of Tuesday, butter prices have settled at 2.5175. Cream supplies are loose given the holiday week and flat cream multiples have brought cream prices lower than in recent weeks. Processors report that churns are more active than in recent weeks. Bulk butter is a main production focus, as end of year holiday orders are nearing complete fulfillment. Spot loads of unsalted butter are more readily available than unsalted.

WEST: Stakeholders indicate cream volumes are increasing and spot load availability has improved throughout the West. Additionally, fat component levels in current milk output are improving in more parts of the West. This is contributing to increased bulk butter production for butter manufacturers that have built their retail inventories to comfortable levels for the November/December holiday season. However, spot load availability of bulk butter is somewhat tight. Plant managers relay strong to steady production schedules. That said, some manufacturers do note planned downtime during the current holiday week. Stakeholders indicate domestic demand is strong. The previous day CME price for butter is $2.5175. Contacts say many spot load buyers have come off the sidelines during November.

NATIONAL - CONVENTIONAL DAIRY PRODUCTS

Conventional cheese in 6- to 8 -ounce shred varieties was the most advertised cheese item, with an average advertised price of $2.37, $.42 below last week's price. The only variety of cheese with ad totals that increased week over week was organic cheese in 6- to 8-ounce slices, with ad numbers increasing 26 percent.

On the shortened holiday week, total conventional dairy ads were 40 percent lower than week 46, while organic ad totals decreased by 43 percent. Despite fewer ads surveyed because of the holiday, a few dairy items' ad totals moved higher week over week. Conventional eggnog half-gallons and conventional flavored milk gallons, both seasonal favorites, moved higher this week. Still, conventional ice cream in 48- to 64-ounce containers maintains the top spot for ad numbers, while Greek yogurt in 32-ounce containers is the most advertised organic dairy item, ahead of the usual organic leader, half-gallon milk.

RETAIL PRICES - CONVENTIONAL DAIRY - NOVEMBER 22

Commodity	US	NE	SE	MID	SC	SW	NW
Butter 8 oz	3.62	3.00	4.37		3.50		
Butter 1#	3.92	3.69	4.72	3.37	2.99	3.18	2.57
Cheese 6-8 oz block	2.29	2.38	2.04	2.37	2.00	3.02	
Cheese 6-8 oz shred	2.37	2.21	2.18	2.74	2.34	2.42	2.48
Cheese 6-8 oz sliced	3.17	2.61	4.27	3.10		2.58	2.85
Cheese 1# block	4.05	4.23			3.86	3.99	
Cheese 1# shred	3.98		3.98			3.99	
Cheese 2# block	6.26	9.49	6.01	4.99	4.99		6.30
Cheese 2# shred	6.26	7.99	4.99	4.99	7.34	7.99	5.46
Cottage Cheese 16 oz	2.43	3.49		2.00	2.49	1.99	2.49
Cottage Cheese 24 oz	2.64		2.66				2.49
Cream Cheese 8 oz	2.32	2.47	2.41	2.42	1.54	2.59	2.54
Egg Nog quart	3.69	3.99	3.57	3.77		4.22	
Egg Nog ½ gallon	5.48	5.89	5.66	4.18	5.51	4.99	
Milk ½ gallon	1.75		1.76		1.76		1.63
Milk gallon	3.06	3.77	3.06	2.66	3.20	2.48	
Ice Cream 14-16 oz	3.11	4.15	1.77	3.87	1.96	3.57	3.00
Ice Cream 48-64 oz	4.08	3.28	4.61	4.26	3.89	3.66	3.81
Flavored Milk gallon	3.10		3.10		3.10		
Sour Cream 16 oz	2.23	2.16	2.44	2.66	2.49	2.05	2.25
Sour Cream 24 oz	2.49		2.49	2.14			2.49
Yogurt (Greek) 4-6 oz	1.14	1.21	1.15	1.25		0.92	0.89
Yogurt (Greek) 32 oz	5.29	5.06	5.22	5.00	5.58		
Yogurt 4-6 oz	0.70	0.78	0.72	0.59		0.62	0.59
Yogurt 32 oz	2.59	3.44	2.36	3.50	2.36	4.04	

ORGANIC DAIRY - RETAIL OVERVIEW

National Weighted Retail Avg Price:

Butter 8 oz:		Sour Cream 16 oz:	$4.49
Butter 1 lb:	$6.01	Ice Cream 48-64 oz	$8.29
Cheese 6-8 oz shred:		Milk ½ gallon:	$5.16
Cheese 6-8 oz block:	$7.38	Milk gallon:	$6.99
Cheese 6-8 oz sliced:	$3.71	Egg Nog quart:	
Cheese 1 lb shred:		Yogurt 4-6 oz:	$1.46
Cheese 2 lb shred:		Greek Yogurt 4-6 oz:	
Cottage Cheese 8 oz:		Yogurt 32 oz:	$4.49
		Yogurt Greek 32 oz	$6.82

DRY DAIRY PRODUCTS - NOVEMBER 21

WPC CENTRAL/WEST: Stakeholders say spot market demand for WPC 34% is strong, as loads of WPC 34%remain a good value compared to alternative dairy protein sources. Animal feed producers are actively purchasing loads of WPC 34%. Tight inventories and bullish markets for whey protein concentrate 80% and whey protein isolate are causing plant managers to focus their production efforts on these commodities, limiting available production time for WPC 34%. Inventories of WPC 34% continue to grow thinner, and stakeholders say preferred brands or loads which meet their specific needs are difficult to obtain. Contacts say they anticipate markets for WPC 34% to remain bullish in the coming weeks.

LACTOSE CENTRAL/WEST: Lactose spot markets are active as demand remains strong in domestic markets. Manufacturers report demand for lactose is picking up from international customers. Contacts report steady lactose purchasing from contract purchasers, and an increasing number say they are securing contracts for delivery in Q1 of 2024. Lactose inventories are available but growing tighter. Some stakeholders report loads of lactose which meet their specific needs are more difficult to obtain on the spot market. Lactose production is mixed this week. Some contacts say increasing prices for lactose have made production more favorable in recent weeks.

DRY BUTTERMILK WEST: Market tones are firm to slightly bullish, with current inventory levels keeping a lid on bearish market tones. Spot load availability remains tight overall. However, with more butter churns active and busier butter churning production schedules, more buttermilk is anticipated to be available for drying in coming weeks. Some manufacturers indicate production schedules through year end are focusing on fulfilling contractual obligations more than adding spot load inventories. Dry buttermilk production is steady. Overall, dry buttermilk demand has been outpacing supplies for much of Q4 and continues to do so. Export demand is moderate to light.

WEEKLY COLD STORAGE HOLDINGS

SELECTED STORAGE CENTERS IN 1,000 POUNDS - INCLUDING GOVERNMENT

DATE	BUTTER	CHEESE
11/20/23	30,863	79,499
11/01/23	32,529	80,418
Change	-1,666	-919
Percent Change	-5	-1

CME CASH PRICES - NOVEMBER 20 - 24, 2023

Visit www.cheesereporter.com for daily prices

	500-LB CHEDDAR	40-LB CHEDDAR	AA BUTTER	GRADE A NFDM	DRY WHEY
MONDAY November 20	$1.5100 (-5)	$1.6000 (NC)	$2.5175 (+2¾)	$1.1925 (NC)	$0.4025 (-¾)
TUESDAY November 21	$1.4950 (-1½)	$1.5900 (-1)	$2.5300 (+1¼)	$1.1725 (-2)	$0.3975 (-½)
WEDNESDAY November 22	$1.4400 (-5½)	$1.5900 (NC)	$2.5000 (-3)	$1.1850 (+1¼)	$0.3975 (NC)
THURSDAY November 23	No Trading	No Trading	No Trading	No Trading	No Trading
FRIDAY November 24	No Trading	No Trading	No Trading	No Trading	No Trading
Week's AVG $ Change	$1.4817 (-0.1713)	$1.5933 (-0.0287)	$2.5158 (-0.1067)	$1.1833 (+0.0232)	$0.3992 (-0.0128)
Last Week's AVG	$1.6530	$1.6220	$2.6225	$1.2065	$0.4120
2022 AVG Same Week	$1.8217	$2.1833	$2.9258	$1.4142	$0.4400

MARKET OPINION - CHEESE REPORTER

Cheese Comment: Monday's block market activity was limited to an unfilled bid for 1 car at $1.5500, which left the price unchanged at $1.6000. One car of blocks was sold Tuesday at $1.5900, which lowered the price. Wednesday's block market activity was limited to an unfilled bid for 2 cars at $1.5500, which left the price unchanged at $1.5900. The barrel price declined Monday on a sale at $1.5100, fell Tuesday on an uncovered offer at $1.4950, and dropped Wednesday on a sale at $1.4400. Just one truckload of block was traded this week on the CME market, while 12 truckloads of barrels weree traded.

Butter Comment: The price rose Monday on a sale at $2.5175, increased Tuesday on a sale at $2.5300, then declined Wednesday on a sale at $2.5000.

Nonfat Dry Milk Comment: The price dropped Tuesday on a sale at $1.1725, then increased Wednesday on a sale at $1.1850.

Dry Whey Comment: The price fell Monday on an uncovered offer at 40.25 cents, and declined Tuesday on a sale at 39.75 cents.

The CME is closed for the Thanksgiving Holiday on Thursday and Friday

WHEY MARKETS - NOVEMBER 20 - 24, 2023

RELEASE DATE - NOVEMBER 21, 2023

Animal Feed Whey—Central: Milk Replacer:		.2400 (NC) – .2700 (NC)
Buttermilk Powder:		
Central & East:	1.0400 (NC) – 1.1000 (NC)	West: 1.0800 (NC) –1.2600 (NC)
Mostly:	1.1200 (NC) – 1.2000 (NC)	
Casein: Rennet:	3.1500 (NC) – 3.6500 (NC)	Acid: 3.3000 (NC) – 3.7000 (NC)
Dry Whey—Central (Edible):		
Nonhygroscopic:	.3500 (NC) – .4200 (NC)	Mostly: .3700 (NC) – .4100 (NC)
Dry Whey–West (Edible):		
Nonhygroscopic:	.3400 (NC) – .4350 (NC)	Mostly: .3800 (NC) – .4200 (NC)
Dry Whey—NE:	.3675 (NC) – .4375 (NC)	
Lactose—Central and West:		
Edible:	.1650 (+1½) – .4100 (+2)	Mostly: .2000 (NC) – .3000 (NC)
Nonfat Dry Milk —Central & East:		
Low/Medium Heat:	1.1600 (NC) – 1.2400 (NC)	Mostly: 1.1850 (NC) – 1.2200 (NC)
High Heat:	1.3000 (NC) – 1.3600 (NC)	
Nonfat Dry Milk —Western:		
Low/Med Heat:	1.1300 (NC) – 1.2600 (NC)	Mostly: 1.1850 (-½) – 1.2300 (NC)
High Heat:	1.2975 (-¼) – 1.4450 (NC)	
Whey Protein Concentrate—34% Protein:		
Central & West:	.8200 (+2) – 1.0400 (+½)	Mostly: .8500 (NC) –.9500 (+1)
Whole Milk:	1.7000 (-10) – 2.0500 (-10)	

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

HISTORICAL MONTHLY AVG BARREL PRICES

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
'08	1.8774	1.9560	1.7980	1.8010	2.0708	2.0562	1.8890	1.6983	1.8517	1.8025	1.6975	1.5295
'09	1.0832	1.1993	1.2738	1.1506	1.0763	1.0884	1.1349	1.3271	1.3035	1.4499	1.4825	1.4520
'10	1.4684	1.4182	1.2782	1.3854	1.4195	1.3647	1.5161	1.6006	1.7114	1.7120	1.4520	1.3751
'11	1.4876	1.8680	1.8049	1.5756	1.6902	2.0483	2.1124	1.9571	1.7010	1.7192	1.8963	1.5839
'12	1.5358	1.4823	1.5152	1.4524	1.4701	1.5871	1.6826	1.7889	1.8780	2.0240	1.8388	1.6634
'13	1.6388	1.5880	1.5920	1.7124	1.7251	1.7184	1.6919	1.7425	1.7688	1.7714	1.7833	1.8651
'14	2.1727	2.1757	2.2790	2.1842	1.9985	1.9856	1.9970	2.1961	2.3663	2.0782	1.9326	1.5305
'15	1.4995	1.4849	1.5290	1.6135	1.6250	1.6690	1.6313	1.6689	1.5840	1.6072	1.5305	1.4628
'16	1.4842	1.4573	1.4530	1.4231	1.3529	1.5301	1.7363	1.8110	1.5415	1.5295	1.7424	1.6132
'17	1.5573	1.6230	1.4072	1.4307	1.4806	1.3972	1.4396	1.5993	1.5691	1.6970	1.6656	1.5426
'18	1.3345	1.4096	1.5071	1.4721	1.5870	1.4145	1.3707	1.5835	1.4503	1.3152	1.3100	1.2829
'19	1.2379	1.3867	1.4910	1.5925	1.6278	1.6258	1.7343	1.7081	1.7463	2.0224	2.2554	1.8410
'20	1.5721	1.5470	1.4399	1.0690	1.5980	2.3376	2.4080	1.4937	1.6401	2.2213	1.8437	1.4609
'21	1.5141	1.4442	1.4811	1.7119	1.6923	1.5639	1.4774	1.4158	1.5319	1.8008	1.5375	1.6548
'22	1.8204	1.9038	2.0774	2.3489	2.3567	2.2077	2.0581	1.8741	2.0690	2.1285	1.9454	1.8395
'23	1.6803	1.5761	1.8175	1.5921	1.5073	1.5037	1.5404	1.8190	1.7065	1.6400		

USDA, Small Business Administration Partner To Boost Rural America

Reno, NV—Deputy US Secretary of Agriculture Xochitl Torres Small on Monday announced that USDA is strengthening its longstanding partnership with the US Small Business Administration (SBA) to create jobs and expand access to new and better market opportunities for people in rural America.

Through a memorandum of understanding (MOU) signed Monday, USDA and SBA are committing to increase investments in small and underserved communities to help grow the rural economy and create good-paying jobs for people nationwide.

The agencies are also committing to expand opportunities for rural technical assistance providers, entrepreneurs, cooperatives, and small business owners. They will also provide resources to help rural businesses compete in both domestic and international markets.

As part of the MOU signed Monday, the agencies may work together to:

•Provide joint trainings, technical assistance and mentorship opportunities for rural small business owners and entrepreneurs.

•Help agricultural producers and small businesses identify ways to export their products around the world.

•Expand collaboration between USDA's Rural Partners Network and SBA's Resource Partners Network.

•Cross-promote programs that support rural businesses and socially disadvantaged communities, and more.

"At USDA, we are redoubling our commitment to drive economic security and prosperity for people in rural America, so they can find opportunities to succeed right in the places they call home," Torres Small commented.

"Rural small businesses strengthen local economies — creating jobs and serving communities," SBA Administrator Isabel Casillas Guzman remarked.

"Strengthening our collaboration with the SBA helps us expand these opportunities for people to build brighter futures for generations to come," Torres Small continued.