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Higher Percentages Of US Milkfat, Solids Used In Cheese In 2021

Fluid Milk Products Used Less Milkfat, Skim Solids Last Year; Less Milkfat Used In Butter

Washington—In 2021, cheese not only increased its use of both milkfat and skim solids, but it also used a higher percentage of both milkfat and skim solids than in 2020, according to figures released earlier this month by USDA's Economic Research Service (ERS).

Meanwhile, lower volumes of both milkfat and skim solids were used in fluid milk products last year than in 2020, and fluid milk products also used lower percentages of both milkfat and skim solids than in 2020.

For this dairy data set, ERS provides seven tables for the supply and allocation of milkfat and skim solids by product. Those tables include product volumes (2021 production); milkfat and skim solids supply and dairy industry allocation; milkfat and skim solids percentage of total supply by product; and milkfat and skim solids content of products.

In 2021, the total US milkfat supply was a record 9.1 billion pounds, up from 8.9 billion pounds in 2020. That 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.

Cheese (other than cottage cheese) used 3.84 billion pounds of milkfat in 2020, up 137.1 million pounds from 2020.

The last time the volume of milkfat used to make cheese declined was in 2003, when milkfat use in cheese of 2.4 billion pounds was down almost 5.0 million pounds from 2002.

Last year, cheese used 42.1 percent of the total milkfat supply, up from 41.7 percent in 2020 but down from 42.5 percent in 2019. Cheese has now used more than 40 percent of the US milkfat supply every year since 2009, including a record high of 42.8 percent in 2018.

The milkfat content of cheese last year averaged 27.99 percent, up from 27.94 percent in 2020 and the highest average milkfat content for cheese since 2009, when it was 28.12 percent. It had reached a recent low of 27.84 percent in 2016.

Butter continued to be the second-largest user of milkfat in 2021, although the 1.67 billion pounds of milkfat that was used to produce butter was down almost 60 million pounds from 2020. More than 1.5 billion pounds of milkfat has been used to produce butter every year since 2017.

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

In 2021, butter used 18.3 percent of the US milkfat supply, down from 19.5 percent in 2020 and the lowest percentage since 2017's 17.9 percent. As recently as 2003, less than 16.0 percent of the US milkfat supply was used to produce butter.

Last year, fluid beverage milk products used 962.0 million pounds of milkfat, down 42.5 million pounds from 2020 and the lowest volume of milkfat used in fluid milk products since 2015, when the milk volume totaled 952.9 mil-

• See **Fat, Solids Use,** p. 7

US Milk Production Rose 1.4% In Oct.; Texas Tops Idaho In Monthly Milk Output

Washington—US milk production in the 24 reporting states during October totaled 18.1 billion pounds, up 1.4 percent from October 2021, USDA's National Agricultural Statistics Service (NASS) reported Monday.

September's milk production estimate for the 24 reporting states was revised down by 13 million pounds, so output was up 1.5 percent from September 2021, rather than up 1.6 percent as initially estimated.

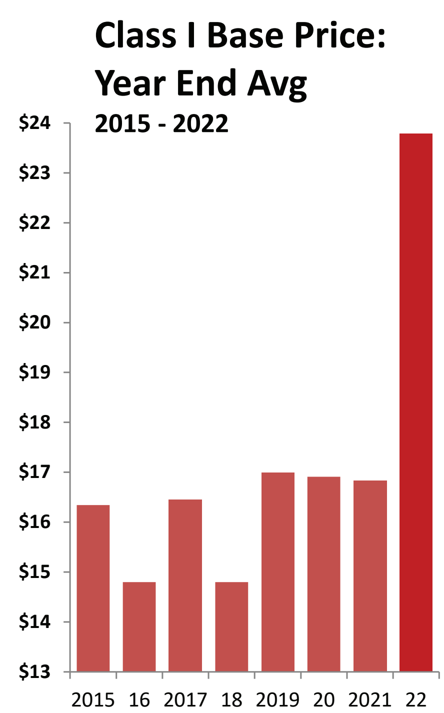
Production per cow in the 24 reporting states averaged 2,021 pounds for October, 18 pounds above October 2021.

The number of milk cows on farms in the 24 reporting states in October was 8.93 million head, 42,000 head more than October 2021 and 1,000 head more than September 2022.

For the entire US, October milk production totaled 18.9 billion pounds, up 1.2 percent from October 2021. Production per cow in the US averaged 2,001 pounds for October, 17 pounds above October 2021. The number of milk cows on farms in the US in October was 9.42 million head, 31,000 more than October 2021 and 1,000 head more than September 2022.

California's October milk production totaled 3.4 billion pounds, down 0.5 percent from October

• See **1.4% More Milk,** p. 6



USDA Seeks Cheddar, Processed Cheese To Support Activities To Feed Kids, Families

Washington—The US Department of Agriculture (USDA) last Friday issued a solicitation for Cheddar cheese, processed cheese and various other food products for use in domestic food distribution programs.

These purchases are being made pursuant to an announcement the agency made earlier this month to purchase a variety of protein items, including dairy, meat and poultry items, to support activities to feed kids and families. The funds, provided through USDA's Commodity Credit Corporation (CCC), will support nearly $1 billion to purchase food for emergency food providers such as food banks.

• See **USDA Seeks Cheese,** p.16

Consortium For Common Food Names Marks 10 Years Of Battling GI Limits

Arlington, VA—The Consortium for Common Food Names (CCFN) this year is marking 10 years of battling the European Union's (EU) ongoing efforts to restrict the use of generic names for cheese and other food products.

CCFN was launched in March of 2012 by food companies and organizations from several countries, including the US, Argentina and Costa Rica. It is an independent, non-profit alliance that represents the interests of consumers, farmers, food producers and retailers.

While it supports proper geographical indications (GIs) — names associated with specialized foods from regions around the world — the Consortium for Common Food Names opposes any attempt to monopolize common (generic) names that have become part of the public domain.

CCFN believes several guidelines can be helpful in establishing a model that protects both common names and legitimate food-related GIs. Considerations include:

—Requiring that a GI include the name of the region or subregion where the product is produced, and a second term that describes the product (e.g., Camembert de Normandie").

—Maintaining a strong tie to the full original GI by protecting the term only in its original language and in transliteration (e.g., "Parmigiano Reggiano").

—Establishing reference points for identifying common names, such as the existence of a Codex

• See **10 Years Of CCFN,** p. 8

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...we can conclude that a fair amount of the "science" that went into the updated WIC food package proposal is based on the Dietary Guidelines for Americans...And those guidelines, as we've noted previously in this space, are flawed.

'Science-Based' Is Sometimes In The Eye Of The Beholder

USDA's Food and Nutrition Service late last week released a proposed rule to revise regulations governing food packages provided under the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC).

Although we didn't mention it in our front-page story last week on these proposed WIC changes, USDA claimed, in the headline of the press release announcing the proposal, that the agency is proposing "Science-Driven Updates" to foods provided through WIC. The second sentence in USDA's press release referred to "science-based revisions"

US Ag Secretary Tom Vilsack also mentioned science, noting that the proposed changes will ensure that WIC provides foods that "reflect the latest nutrition science to support healthy eating and bright futures." The third paragraph of USDA's press release also mentioned "the latest nutrition science."

A similar phrase, "the latest nutritional science," was also included in the summary of the proposed rule as it appeared in the *Federal Register* on Monday, Nov. 21. The summary specifically stated that the proposed changes are intended to provide WIC participants "with a wider variety of foods that align with the latest nutritional science..."

All of this talk about science got us thinking about the role of science in this specific rulemaking, and more generally in how the choice of which science to follow can influence such things as proposed and final rules.

USDA's proposed rule explains how it developed the WIC food package revisions. Some eight years ago, USDA's FNS contracted with the National Academies of Sciences, Engineering and Medicine (NASEM) to conduct a review of the WIC food packages, in accordance with the Healthy, Hunger-Free Kids Act of 2010, which required USDA to conduct a scientific review of the WIC food packages at least every 10 years.

NASEM's review process included a review and analysis of available scientific evidence, including, among other things, the 2015-2020 Dietary Guidelines. NASEM released its review of WIC food packages in 2017.

Because NASEM's review and recommendations were based on the 2015-2020 DGA, to ensure continued alignment with the current DGA (the 2020-2025 DGA was published in December 2020), FNS incorporated relevant updates into the proposed changes to the WIC food packages.

From this background, we can conclude that a fair amount of the "science" that went into the updated WIC food package proposal is based on the Dietary Guidelines for Americans (both the current edition as well as the previous edition). And those guidelines, as we've noted previously in this space, are flawed.

Part of the problem with the current Dietary Guidelines is timing. They were released at the end of 2020, which means they were largely written in 2020 and earlier. And in fact the process of developing the next edition of the Dietary Guidelines is already underway; USDA and the US Department of Health and Human Services USDA requested nominations from the public for the 2025 Committee June 15 through July 15, 2022, and aim to appoint the 2025 Dietary Guidelines Advisory Committee early in 2023.

If the 2020 DGAC timetable is followed by the 2025 DGAC, there will be several committee meetings in 2023 and then a final report will be released sometime around mid-2024. From there, USDA and HHS will develop the next edition of the Dietary Guidelines.

USDA is accepting comments on its proposed updates to WIC food packages until Feb. 21, 2023, or before the Dietary Guidelines Advisory Committee holds its first meeting, let alone releases its final report. When USDA previously updated the WIC food packages, it published a proposed rule in August 2006 and an interim rule in December 2007 that implemented revised food packages. A final rule was published in March 2014.

In other words, it would appear that USDA will possibly issue a final rule revising the WIC food packages well before the next edition of the Dietary Guidelines is released, meaning the final WIC food package rule will be based on the "latest" science that's already several years old (the 2020-2025 DGA).

Then there's the problem of what's in the 2020-2025 DGA. Among other things, it's recommended to limit intake of saturated fat to less than 10 percent of calories per day, a recommendation that has not only been roundly criticized by numerous scientists, researchers, nutritionists, journalists and others, but has also been refuted, or at least called into question, by numerous studies that have been conducted and published in recent years.

Interestingly, one of the questions that will be addressed by the Dietary Guidelines Advisory Committee is as follows: "What is the relationship between food sources of saturated fat consumed and risk of cardiovascular disease?"

Meanwhile, USDA is proposing a total of nine changes to milk and milk substitutions in the WIC food packages. Among the changes: remove cheese from the fully breastfeeding food package, which aligns with the DGA recommendation for reducing saturated fat consumption.

The bottom line on this WIC proposed rule is that USDA is using old and questionable science to reduce access to dairy products for WIC participants, while also acknowledging that it's unsure about the relationship between food sources of saturated fat and health risks.

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Global Milk Production To Rise In 2022, But Dairy Trade Expected To Contract

Rome, Italy—World milk production is forecast to expand in 2022, albeit slowly, but global dairy trade could contract, according to the *Food Outlook* report released earlier this month by the Food and Agriculture Organization (FAO) of the United Nations.

World milk production in 2022 is forecast at 930 million tons, up 0.6 percent from 2021, the slowest growth pace in the last two decades, the report said. Much of the expansion is foreseen to originate in India and Pakistan on rising dairy herds, although at slower growth rates than in earlier years due to animal disease outbreaks and extreme weather events, and in China, sustained by large-scale dairy operations.

These predicted production increases will likely be nearly offset by possible output contractions in several countries. Most notable declines are anticipated in Ukraine, impacted by the ongoing war with Russia, and in Brazil, the European Union (EU), Turkey, New Zealand and Australia, owing to extreme weather events, labor shortages and high input costs, leading to squeezed profit margins.

Global trade in dairy products in 2022 is forecast at 85 million tons (in milk equivalents), down 3.4 percent from 2021, which would represent the first decline in nearly two decades, according to the report. The anticipated trade contraction is primarily attributable to a likely 15 percent drop in imports by China, mostly of whey and milk powders, starting from April, on high inventories, rising domestic milk production and lower foodservice sales related to COVID-related measures.

Dairy imports are also forecast to drop significantly in Vietnam, Russia and Bangladesh, reflecting lower consumer purchases, and in Sri Lanka, because of limited foreign exchange availability. By contrast, imports by the Philippines, Indonesia and Mexico are expected to increase markedly, partially offsetting the declines expected elsewhere.

On the supply side, New Zealand, the EU, Belarus and Turkey may register steep decreases in dairy exports, which could be partially compensated by higher shipments from the US, India, Argentina and Mexico, the report noted.

The FAO Dairy Price Index rose steadily since May 2020, except for four months from June to September 2021, reaching near-record highs in June 2022, only 4 percent below the all-time high that the index reached in December 2013.

This episode of price increase was mainly driven by the tightening of global markets on the back of lower supplies from Western Europe and Oceania, the report explained. Since June, however, international dairy prices have been declining, underpinned by lower global import demand, notwithstanding the continued tight supply situation in several leading exporting countries.

The report also noted that the world food import bill is expected to rise to US$1.94 trillion in 2022, higher than previously expected. The new forecast would mark an all-time high and a 10-percent increase over the record level of 2021, although the pace of the increase is expected to slow down in response to higher world food prices and depreciating currencies against the US dollar. Both weigh on the purchasing power of importing countries and, subsequently, on the volumes of imported food.

The bulk of the increase in the import bill is accounted for by high-income countries, due mostly to higher world prices, while volumes are also expected to rise. Economically vulnerable country groups are being more affected by the higher prices.

For example, the aggregate food import bill for the group of low-income countries is expected to remain almost unchanged even though it is predicted to shrink by 10 percent in volume terms, pointing to a growing accessibility issue for these countries.

"These are alarming signs from a food security perspective, indicating importers are finding it difficult to finance rising international costs, potentially heralding an end of their resilience to higher international prices," the report stated.

The report warns that existing differences are likely to become more pronounced, with high-income countries continuing to import across the entire spectrum of food products, while developing regions are increasingly focused on staple foods.

The FAO report also assesses global expenditures on imported agricultural inputs, including fertilizers. The global input import bill is expected to rise to US$424 billion in 2022, up 48 percent from 2021 and as much as 112 percent higher than in 2020.

Higher costs for imported energy and fertilizer are behind the foreseen increase.

Lots Of Uncertainty Over 2023 Milk Prices

Dairy Situation & Outlook - Nov. 21

DR. BOB CROPP,
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Milk production continues to run above year ago levels. October production was 1.2 percent above a year ago, the result of 31,000 more cows, an increase of 0.3 percent, and 0.9 percent more milk per cow. This was the third straight month of more than a 1 percent increase. Of the 24 reporting states 14 had an increase in milk production, six a decrease in production and four with no change.

States with relatively high increases in milk production were South Dakota 14.1 percent, Georgia 13.7 percent, Iowa 7.6 percent and Kansas 4.5 percent. Florida and New Mexico had relatively large decreases of 12.9 percent and 4.2 percent respectively due to fewer milk cows.

The price of barrel and block was above $2 per pound from mid-September to early October. By the end of October barrels fell to a low of $1.925 and 40-pound blocks to $1.96. But increased buying by grocery stores building inventory for the holidays and continued strong exports surprisingly rallied the cheese market. Cheddar production was also running lower than a year ago with September cheddar production down 1.7 percent.

While 40-pound blocks remain above $2 per pound barrels on November 17th fell below $2. Today's prices are $2.20 for blocks and $1.8425 for barrels. Dry whey continues to hover around $0.44 per pound. A weakening of the Class III price was anticipated by November, but the cheese price rally will put the November Class price near $21 compared to $21.81 in October. We can expect some weakening of the Class III price for December.

Butter got as low as $2.61 per pound in early November and today it was $2.90. Nonfat dry milk was in the $1.50's during September before declining and reaching a low of $1.37 per pound early November. It strengthened some since then and today it is $1.4275. The weakening of both butter and nonfat dry milk will put the November Class IV price near $23.30 compared to $24.96 in October. The Class IV price could fall to the $22's for December.

There is uncertainty as to where milk prices will end up in 2023. As of now it looks like prices will average lower than 2022 but remain as the second highest average milk price over the past two years. Higher feed prices, labor issues, construction costs and milk base plans still implemented by some dairy cooperatives will restrict increases in milk production.

USDA is forecasting just an increase of 10,000 cows in the average herd size for the year and an increase of 0.9 percent in milk per cow resulting in an increase of 1.0 percent in total milk production. Milk production could easily increase by more than this but should be at a level for favorable milk prices.

Fluid (beverage) milk sales will likely continue the downward trend in 2023. Fluid milk sales through September of this year were down 2.2 percent from a year ago. But butter and cheese sales in 2023 are forecasted to more than offset declining fluid sales resulting in an increase in total milk sales.

Dairy exports set a record in 2021 and are on path to set a new record in 2022. Through September the volume of nonfat dry milk/skim milk powder was down 9 percent from a year earlier but up 13 percent for cheese, 6 percent for whey products, 18 percent for lactose and 39 percent for butterfat resulting in an increase of 4 percent in the volume on a total milk solids equivalent basis.

It may be hard to set another record in 2023 but there is a possibility of increased exports. Milk production in the two leading dairy exporters, New Zealand and the EU has been below a year ago. Some recovery in milk production may occur in 2023 but high feed costs and environmental regulations will dampen any increase. Other than butter US prices have been competitive on the world market. While still competitive world dairy product prices have weaken making US products less competitive.

USDA is forecasting Class III to average about $2.25 lower in 2023 than 2022. Class III will average about $21.90 for 2022 and USDA's 2023 average is $19.65. USDA is forecasting Class IV to average about $4 lower in 2023 than 2022. Class IV will average about $24.30 for 2022 and USDA's 2023 average is $20.35. But final 2023 prices could very well end up higher or lower than USDA's forecast. BC

FROM OUR ARCHIVES

50 YEARS AGO

Nov. 24, 1972: Chicago—Glen Moorhead of Swift & Company announced his retirement as president of the American Butter Institute. He will be succeeded by Carl Geppinger, a former president of the National Cheese Institute.

Chicago—A proposal to amend the standard of identity of Process cheese to include lecithin and a request to prepare a standard of identity for a part-skim Provolone for FDA consideration are currently being studied by the National Cheese Institute Research Committee.

25 YEARS AGO

Nov. 28, 1997: Starkville, MS—The bulldog and cowbell are widely recognized symbols of Mississippi State University, but during the holidays, the university's distinctive three-pound Edam "Cannonball" cheese is not far behind. During the winter holidays, Mississippi State sells more than 46,000 balls of Edam.

Columbus, OH—The Borden Foods processed cheese business in the US is being acquired by Mid-America Dairymen, Inc., Springfield, MO, the nation's largest dairy cooperative. With annual sales of roughly $250 million, the Borden business includes branded and private label processed cheese products at retail and foodservice customers across the US.

10 YEARS AGO

Nov. 23, 2012: Wilson and Grantsburg, WI—The Cady Cheese Factory of Wilson, WI, has been acquired by Burnett Dairy Cooperative. Cady Cheese is a specialty cheese manufacturing, distribution and retail marketing company dating back to 1908. Dale and Wendy Marcott bought the company in 1978. It currently produces over 50,000 pounds of specialty longhorn cheeses with annual sales topping $30 million.

Washington—The US Senate last week passed the Whistleblower Protection Enhancement Act, which supporters say will better protect federal employees, including those charged with enforcing food safety laws, who come forward to disclose government waste, fraud, abuse and other wrong-doing.

Cayuga Milk Ingredients Plans To Expand, Add Aseptic Bottling Line For Milk-Based Drinks

Auburn, NY—Cayuga Milk Ingredients (CMI) recently announced a significant expansion at its Auburn, NY, facility, beginning construction in spring 2023.

The project, in its final engineering phase, will add an aseptic processor, bottling, and packaging line, allowing CMI to produce finished products for the extended shelf-life beverage market.

The high-speed bottling line will have the ability to produce up to 150,000 gallons of milk-based drinks per day. Products will be palletized and then stored onsite in a warehouse using start-of-the-art Automated Storage and Retrieval System (ASRS) technology.

In all, this development at the plant is expected to create 70 full-time positions, in addition to construction jobs and retention of the current staff of 91.

Expansion into bottling will be a new venture for Cayuga. The expansion will help meet the demand for shelf-stable contract manufacturing demanded by the marketplace, CMI said.

Additional improvements planned by CMI will be made with expanded wastewater treatment facilities, developing stormwater retention, trucking and parking enrichments, and utility upgrades. CMI has worked closely with the Cayuga County Industrial Development Agency (CCIDA) since its first land purchase in 2012, and said it is looking forward to the 130,000-square-foot addition in Auburn. CMI and CCIDA recently agreed on a land purchase agreement in the Cayuga County Industrial Park.

"Cayuga is strong and profitable, with a long history of growth and transition," said Neil Rejman, CMI board chairman. "We're looking forward to the future with ambitious projects, like aseptic, that let us build on the dependable people and progress we have developed over the last eight years."

In addition to the aseptic line and ASRS, CMI is also investing in additional raw milk receiving. Two more bays will enable 80 tractor-trailers to pass through the doors per day between deliveries and loadouts to customers. This will ensure CMI can continue to accept fresh local milk and efficiently send out products.

Established in 2014, Cayuga Milk Ingredients is a farmer-owned company that processes milk from 30 family-owned dairy farms within New York's Finger Lakes region.

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

Dairy Leaders Discuss Climate-Smart Grants, Other Sustainability Initiatives

Glendale, AZ—Dairy industry leaders discussed how USDA Partnerships for Climate-Smart Commodities projects can help a climate-smart and profitable future for farmers during the fall meeting of the Dairy Sustainability Alliance® here last week.

The Alliance, formed through the checkoff-founded Innovation Center for US Dairy, consists of companies and organizations across the dairy community and others who want to contribute to dairy's social responsibility journey. Nearly 300 industry stakeholders attended the meeting.

The Alliance meeting provided insights into the USDA Partnership for Climate Smart Commodities grants totaling up to $2.8 billion for 70 projects, including numerous dairy-related projects, announced in September. The projects that include dairy will provide technical and financial assistance for farmers, support the development of expanded markets and revenue streams, and help the industry make progress toward its collective 2050 Environmental Stewardship Goals at the field and farm levels.

The meeting's opening panel featured lead partners who previewed their projects and the goals they hope to achieve. The California Dairy Research Foundation, in partnership with 20 other organizations, including Dairy Cares, was among the projects selected.

Michael Boccadoro, executive director of Dairy Cares, said the project was selected to receive an approximate funding ceiling of $85 million that will be enhanced with an additional $40 million from California. The project will support efforts to build climate-smart dairy markets and provide financial incentives for the state's farmers to adopt manure management practices that reduce methane emissions and manage nitrogen.

"It's a tremendous project that is going to build on and leverage the real unique efforts California has initiated in dairy methane reduction," Boccadoro said. "We've been working on this since 2016 and we have made tremendous progress, reducing over 2 million metric tons of methane in the dairy sector."

Another project, led by Edge Dairy Farmer Cooperative, was selected to receive an approximate funding ceiling of $50 million to expand climate-smart markets and establish dairy and sugar as climate-smart commodities through the implementation of new production practices.

Tim Trotter, Edge's CEO, said the co-op's commitment to sustainable practices starts with farmer input.

"We are blessed to have a visionary membership who about six years ago decided sustainability is a topic we want to address," Trotter said. "What we looked at was how can we build this from the ground up? We want the farmers to be centric in the conversation and be engaged with the conversation and make the best decisions for them, so we need to check all boxes."

Lisa Watson, social responsibility officer of the Innovation Center, offered an update on the US Dairy Stewardship Commitment, launched in 2018 to support farmers, cooperatives and processors who voluntarily work across the industry to advance sustainability leadership and transparently report progress. Commitment terms of adoption are reviewed every three to five years for consistency with the latest science, insights and priorities. Commitment adopters represent more than 75 percent of US milk production.

"The Commitment helps us earn the trust of stakeholders, achieve aggregate reporting and demonstrate that US dairy is a true global sustainability leader," Watson said. "The metrics within the Commitment are aligned with global standards and protocols that help us gain credibility for our work.

"Through the Commitment, we can say with confidence that US dairy farmers and processors are making a real difference and moving the needle toward achieving the Sustainable Development Goals of the United Nations," Watson added.

The Sustainable Agriculture Summit followed the Alliance meeting and is billed as "the premier sustainability event **for** agriculture and **by** agriculture." The meeting featured more than 700 farmers, suppliers, processors, brands, academia, conservation organizations and the public sector and is produced in partnership by the Innovation Center for US Dairy and Field to Market.

The dairy industry was represented on several parts of the Summit's agenda, including a panel discussion moderated by New Mexico producer Tara Vander Dussen, who also is an environmental scientist and co-founder of Elevate Ag.

1.4% More Milk

(Continued from p. 1)

2021, due to 4,000 more milk cows but 15 less pounds of milk per cow. California's September milk production was revised down by 17 million pounds, so output was down fractionally from September 2021, rather than up 0.5 percent as initially estimated.

Wisconsin's October milk production totaled 2.7 billion pounds, up 0.6 percent from October 2021, due to 7,000 fewer milk cows but 25 more pounds of milk per cow. Wisconsin's September milk production had been up 0.9 percent from September 2021.

Moving into the number three spot in US milk production was Texas. Texas' October milk production of 1.408 billion pounds was up 7.0 percent from October 2021, due to 30,000 more milk cows and 45 more pounds of milk per cow. Texas's September milk output was up 8.5 percent from a year earlier.

Idaho's October milk production totaled 1.403 billion pounds, up 3.2 percent from October 2021, due to 10,000 more milk cows and 35 more pounds of milk per cow. Idaho's September milk production was revised up by 9 million pounds, so output was up 3.0 percent from September 2021, rather than up 2.4 percent, as originally estimated.

New York's October milk production totaled 1.3 billion pounds, up 1.7 percent from October 2021, due to 3,000 fewer milk cows but 45 more pounds of milk per cow. New York's September milk output had been up 2.2 percent from October 2021.

Michigan's October milk production totaled 984 million pounds, up 0.3 percent from October 2021, due to 7,000 fewer milk cows but 45 more pounds of milk per cow. Michigan's September milk production was revised up by 3 million pounds, so output was down 0.4 percent from September 2021, rather than down 0.7 percent as initially estimated.

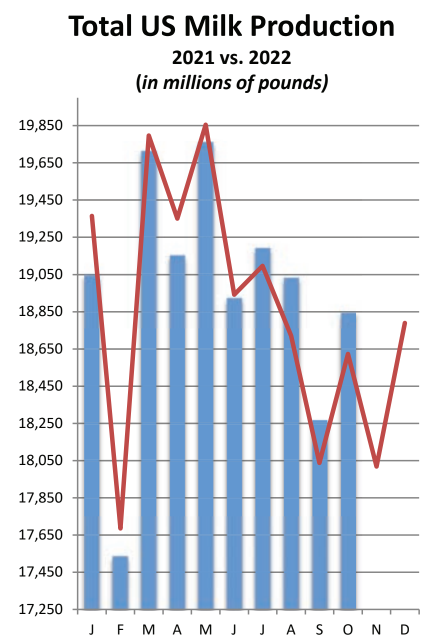
October milk production in Minnesota totaled 881 million pounds, unchanged from October 2021, due to 8,000 fewer milk cows but 35 more pounds of milk per cow. Minnesota's September milk production was revised down by 9 million pounds, so output was down 0.5 percent from September 2021, rather than up 0.6 percent as originally estimated.

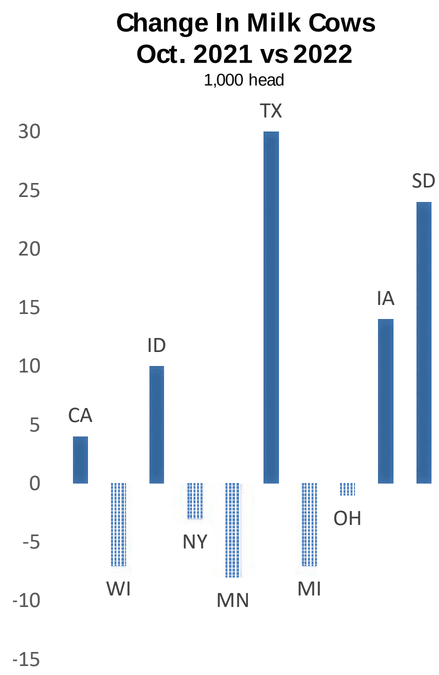
Pennsylvania's October milk production totaled 826 million pounds, up 1.0 percent from October 2021, due to 2,000 fewer milk cows but 25 more pounds of milk per cow. Pennsylvania's September milk production had been down 0.1 percent from September 2021.

New Mexico's October milk production totaled 557 million pounds, down 4.2 percent from October 2021, due to 14,000 fewer milk cows but 10 more pounds of milk per cow. New Mexico's September milk output had been down 3.5 percent from September 2021.

October milk production in Washington totaled 520 million pounds, down 1.7 percent from October 2021, due to 6,000 fewer milk cows but 15 more 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 2021, rather than down 1.2 percent as initially estimated.

All told for the 24 reporting states in October, compared to October 2021, milk production was higher in 14 states, with those production increases ranging from 0.2 percent in Ohio to 14.1 percent in South Dakota; lower in six states, with those decreases ranging from 0.3 percent in Indiana to 12.9 percent in Florida; and unchanged in Illinois, Minnesota, Oregon and Utah.





Milk Production by State

STATE	Oct 2021	Oct 2022	% Change	Change Cows
	millions of lbs			
California	3447	3429	-0.5	4000
Wisconsin	2652	2669	0.6	-7000
Texas	1316	1408	7.0	30000
Idaho	1359	1403	3.2	10000
New York	1287	1309	1.7	-3000
Michigan	981	984	0.3	-7000
Minnesota	881	881	NC	-8000
Pennsylvania	818	826	1.0	-2000
New Mexico	602	577	-4.2	-14000
Washington	529	520	-1.7	-6000
Iowa	461	496	7.6	14000
Ohio	457	458	0.2	-1000
Colorado	436	448	2.8	6000
Arizona	380	386	1.6	4000
Indiana	369	368	-0.3	NC
South Dakota	320	365	14.1	24000
Kansas	336	351	4.5	6000
Oregon	220	220	NC	NC
Vermont	211	212	0.5	-3000
Utah	181	181		NC
Georgia	146	166	13.7	10000
Florida	163	142	-12.9	-12000
Illinois	141	141	NC	-1000
Virginia	119	115	-3.4	-2000

ESHA Research Merges With FoodLogiQ

Salem, OR—ESHA Research, which offers a variety of nutritional analysis and label development solutions to ensure regulatory compliance, recently announced a strategic merger with FoodLogiQ, a leading SaaS provider of traceability, food safety and supply chain transparency solutions.

With increased emphasis on digitizing the supply chain to improve food safety and transparency, the combination of FoodLogiQ and ESHA will offer the food industry an unmatched ability to extend product development and nutritional analysis into supplier compliance, enhanced traceability and automated recall management, according to the announcement.

FoodLogiQ Connect is described as the most comprehensive, data-driven software solution that enables supplier management, food safety compliance, quality incident management, recall management and whole chain traceability — all built exclusively for the food industry, the announcement noted.

Investment for the transaction was provided by The Riverside Company, a global private investor focused on the smaller end of the middle market.

Fat, Solids Use

(Continued from p. 1)

lion pounds. Less than 1.0 billion pounds of milkfat has been used in fluid milk products in 10 of the last 11 years, with 2020 being the lone exception.

By contrast, more than 1.1 billion pounds of milkfat was used in fluid milk products every year from 2000 through 2003.

Fluid milk products used 10.6 percent of the US milkfat supply in 2021, down from 11.3 percent in 2020 and the lowest level in the ERS data series that dates back to 2000. That year, fluid milk products used 18.0 percent of the US milkfat supply.

The average milkfat content of fluid milk products last year was 2.16 percent, down from 2.17 percent in 2020 but still the fifth straight year in which the average milkfat content of fluid milk products was over 2.0 percent. By contrast, the average milkfat content of fluid milk products was under 2.0 percent every year from 2005 through 2016, including a low of 1.82 percent in both 2011 and 2012.

In 2021, a total of 636.1 million pounds of milkfat was used in frozen dairy products, down 25.2 million pounds from 2020 and the lowest volume since 2018's 630.0 million pounds.

Frozen dairy products used 7.0 percent of the US milkfat supply last year, down from 7.4 percent in 2020. As recently as 2006, frozen dairy products used more than 10 percent of the United States milkfat supply.

The average milkfat content of frozen dairy products last year was 9.23 percent, down from 9.39 percent in 2020 but up from 9.09 percent in 2019.

A total of 289.1 million pounds of milkfat was used in sour cream in 2020, up 6.4 percent from 2020. The volume of milkfat used in sour cream has more than doubled since 2000, when it totaled 129.9 million pounds.

Sour cream used 3.2 percent of the US milkfat supply in 2021, unchanged from each of the previous four years.

The average milkfat content of sour cream last year was 19.35 percent, unchanged from each of the five previous years.

Other dairy product categories broken out by ERS, and the volume and percentage of the US milkfat supply they used in 2021, were as follows: nonfrozen yogurt, 74.5 million pounds, 0.8 percent; evaporated and condensed milk (net), 61.8 million pounds, 0.7 percent; dry milk products, 61.7 million pounds, 0.7 percent; whey products (net), 35.8 million pounds, 0.4 percent; and cottage cheese, 17.7 million pounds, 0.2 percent.

Also in 2021, a total of 1.4 billion pounds of milkfat went to what ERS terms "residual" uses; this 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.

Major Uses Of Skim Solids

Also in 2021, the total United States skim solids supply was 20.4 billion pounds, up 349.7 million pounds from 2020 and the second straight year in which the US skim solids supply topped 20 billion pounds.

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

Fluid milk remained the largest user of skim solids last year, although the volume of skim solids used in fluid milk products, 4.09 billion pounds, was down 152 million pounds from 2020 and down almost 500 million pounds from 2014. The last time the volume of skim solids used in fluid milk products topped 5.0 billion pounds was in 2009.

In 2021, fluid milk products used 20.1 percent of the total skim solids supply, down from 21.2 percent in 2020 and the lowest percentage in the 22 years covered by the ERS data. As recently as 2001, fluid milk products used more than one-third (33.8 percent) of the total skim solids supply.

The average sskim solids content of fluid milk last year was 9.18 percent, up from 9.14 percent in 2020 and the highest percentage in the 22 years covered by the ERS data.

Cheese was the second-largest user of skim solids last year; a record 3.87 billion pounds of skim solids was used to produce cheese in 2021, up 147 million pounds from 2020 and up 1.05 billion pounds from 2009.

As a result of rising volumes of skim solids being used in cheese and declining volumes being used in fluid milk, the gap between the two usage categories continues to shrink.

In 2021, fluid milk products used 216 million more pounds of skim solids than did cheese, down from a gap of 515.2 million pounds in 2020, 1.2 billion pounds in 2015 and 2.7 billion pounds in 2000.

In 2021, cheese used 19.0 percent of the total skim solids supply, up from 18.6 percent in 2020 and unchanged from both 2018 and 2019. In 2000, cheese used 15.5 percent of the total skim solids supply.

The average skim solids content of cheese last year was 28.24 percent, up from 28.13 percent in 2020 and the highest percentage since 2018's 28.28 percent.

Last year, a total of 3.34 billion pounds of skim solids was used in whey products (net), up 185 million pounds from 2020 and the highest level since 2014's 3.45 billion pounds.

Whey products have used more than 3.0 billion pounds of skim solids every year since 2012; as recently as 2009, less than 2.0 billion pounds of skim solids was used in whey products.

Whey products in 2021 used 16.4 percent of the total skim solids supply, up from 15.8 percent in 2020 but down from 16.5 percent in 2019 and also down from the record high of 18.8 percent in 2014.

In 2021, a total of 2.5 billion pounds of skim solids was used in dry milk products, down about 7.0 million pounds from 2021's record high.

More than 2.0 billion pounds of skim solids have been used in dry milk products every year since 2016; as recently as 2006, less than 1.0 billion pounds of skim solids was used in dry milk products, according to the ERS figures.

Dry milk products last year used 12.2 percent of the total skim solids supply, down from 12.5 percent in 2020. As recently as 2012, dry milk products used less than 10 percent of the total skim solids supply.

According to ERS, other dairy product categories that used 500 million pounds or more of skim solids last year were:

Yogurt used 722.9 million pounds of skim solids in 2021, up 31.1 million pounds from 2020. Yogurt used 3.5 percent of the total skim solids supply last year, unchanged from 2020.

Frozen dairy products used 688.8 million pounds of skim solids last year, down 17.1 million pounds from 2020. Frozen dairy products used 3.4 percent of the total skim solids supply in 2021, down from 3.5 percent in 2020.

Evaporated and condensed milk (net) used 522.8 million pounds of skim solids in 2021, up 3.3 million pounds from 2020. Evaporated and condensed milk used 2.6 percent of the total skim solids supply last year, unchanged from 2020.

Other dairy product categories broken out by USDA's Economic Research Service, and the volume and percentage of the US skim solids supply they used in 2021, were as follows: sour cream, 113.3 million pounds, 0.6 percent; cottage cheese, 103.9 million pounds, 0.5 percent; butter, 38.3 million pounds, 0.2 percent; and residual, 4.3 billion pounds, 21.1 percent.

10 Years Of CCFN

(Continued from p. 1)

Alimentarius standard or other international standards; use of the term in dictionaries, newspapers, product descriptions in tariff schedules or in explanatory notes; levels and diffusion of global production; international trade; etc.

—Providing the opportunity for stakeholders around the world to comment on GI applications to ensure that officials have fully considered the request and its impact on other farmers and food producers.

GI Controversies Predate CCFN

Although CCFN is just over a decade old, its roots go back to late in the 20th century. National Milk Producers Federation (NMPF), US Dairy Export Council (USDEC) and others have been pushing back against various protectionist EU trade policies since at least 1999.

Back then, the dairy organizations were just beginning to engage on trade and exports, spurred on in part by World Trade Organization (WTO) negotiations and the need to advocate for their members in those meetings, according to Jaime Castaneda, who has served as CCFN's executive director since the organization's founding and is also executive vice president, policy and strategy, at NMPF and executive vice president, policy development, at USDEC.

After the WTO Uruguay Round, the Doha Round was launched in 2000 and the EU was "adamant" about using those global trade negotiations to impose new GI restrictions on the entire world. "We successfully shut that effort down in the WTO," Castaneda said.

But by the late 2000s, it was clear that the Doha Round itself had faltered, Castaneda noted. In its wake, the EU began to engage in free trade agreements. In late 2009, the EU and South Korea signed a trade deal in which GI restrictions were a core element — a first for bilateral free trade agreements (FTAs).

As NMPF, USDEC and others worked to minimize the damage of that trade deal prior to its 2012 implementation, the EU began to pursue GI provisions in trade agreements with additional countries as well. As those efforts began to proliferate in Central America, "it became clear that we needed a global strategy," building out from the US and joining with partners around the world, Castaneda mentioned.

"When the EU first started negotiating GI restrictions in its free trade agreements, we honestly thought that the US and the EU would find common ground and establish an agreement on this issue within a few years," Castaneda commented. US-EU bilateral negotiations to try to reach an FTA formally launched in July 2013, and remained active until collapsing in 2016.

A "key factor" in the lack of resolution of the GI issue has been that, while the EU continues to pursue and conclude FTA negotiations with many countries, US FTA efforts have ground to a halt in recent years, he pointed out. The United States hasn't negotiated, concluded and implemented an FTA with a new country for over a decade.

"That has meant that we in the private sector have had to step up and do what the government hasn't been able to do," Castaneda explained. "To deal with the continued protectionist policies the EU is pursuing, we must continue to defend common names not only internationally, but also domestically."

Successes & Disappointments

Regarding CCFN's biggest successes in its 10-year existence, Castaneda noted that, internationally, CCFN has been successful particularly in Asia and Central America in working to preserve the use of key generic terms like Parmesan, Mozzarella, Provolone and others in top US dairy export markets such as Japan, China, South Korea, Vietnam, Guatemala, Costa Rica, El Salvador and elsewhere.

The Consortium for Common Food Names also worked closely with the US government to craft important US-Mexico-Canada Agreement (USMCA) commitments to protect the future use of specific cheese names and maximize the scope of the EU-Mexico FTA's grandfathering provisions across the full supply chain, Castaneda said.

Among its domestic successes, "we're proud of our work to successfully defend, through two positive legal rulings to date, the generic use of 'Gruyere' in the US market, given the precedential nature of this case for other common names as well," Castaneda said.

Late last year, US District Judge T.S. Ellis ruled that the "undisputed evidence" produced by the parties in a case involving whether or not the term "Gruyere" is generic makes clear that the term "is a generic term for a type of cheese and does not refer solely to cheese from a specific geographic region." Thus, the term Gruyere "through the process of genericide, has become generic and is ineligible for registration as a certification mark," Ellis stated.

Also domestically, CCFN has proposed, and subsequently seen adopted, targeted improvements to the US system for considering new GI-related trademarks "so that we minimize the risk of future restrictions in this market," Castaneda said.

Despite these successes, there have also been some letdowns, Castaneda said, "but frankly the biggest disappointment has been the US government's inability to match the EU's level of engagement on this issue, particularly in recent years."

CCFN continues to work to prod the Office of the US Trade Representative (USTR) "to secure the type of explicit and strong government-to-government commitments that are needed to put an end to the EU's ever-creeping strategy of working to choke off competition," Castaneda continued.

"Considering that multiple countries have previously secured much more balanced results in their own FTA negotiations with the EU on GIs, this failure by several South American governments to stand up to the EU was particularly surprising."

Jaime Castaneda, CCFN

CCFN has also been disappointed by some South American countries like Brazil, Argentina and Chile who have historically been strong defenders of common names, "yet in their FTA negotiations with the EU have chosen to toss their own intellectual property laws overboard and settle for crumbs on behalf of their consumers and small businesses," Castaneda said.

"Considering that multiple countries have previously secured much more balanced results in their own FTA negotiations with the EU on GIs, this failure by several South American governments to stand up to the EU was particularly surprising," he added.

In the coming years, the hope is that "CCFN will no longer be needed," Castaneda said. But for that to happen, the US government "must decide that it is finally time to robustly defend the interests of American food and wine producers against these predatory global policies.

"Only government-to-government solutions can provide the long-term commitments needed to fully combat the EU government's efforts," Castaneda continued.

"Closer to home, we expect Europe to continue to probe for weak points in our own system and lobby for changes that would let them export their GI system here," Castaneda added. To counter that, CCFN "may continue to be needed to safeguard our own market for years to come."

For more information about Consortium for Common Food Names, visit *www.commonfoodnames.com*.

Renard's Cheese Breaks Ground On New Operations; Grows Distributor Network

Algoma, WI—Renard's Cheese broke ground last week on Phase 1 of a three-phase expansion that will include a new production facility, and an on-site exact weight cut and wrap and warehouse, driven by a growing demand for the company's products.

Currently operating in a plant built in the 1920s, the new Renard's operation will be a 50,000-square-foot facility that will ultimately increase production to 12 million pounds of cheese per year; warehouse that production on-site; and ease the labor issues in the packaging area with automation.

"Demand has been very good," said Chris Renard, vice president of Renard's Cheese. "Last year we turned down about 6 million pounds of production because we were limited in capacity. The year before that, we turned down 4 million."

"We have added a lot of varieties to our cheese line. We are starting to do a lot of blended cheese. We are not just making plain Cheddar anymore. Demand for these products has really grown."

Chris Renard, Renard's Cheese

Renard's Cheese can only make about 3 million pounds of cheese in its current facility.

In this first phase of the expansion, the company will go from 3 million pounds to 4.5 million pounds. And then in the third phase, Renard's will take the business from 4.5 million pounds to 12 million.

Phase 1 of the expansion will be completed in the spring of 2023, while phase three is set to be completed by the end of 2025.

"The whole idea is being able to handle more capacity to meet demand," said Ann Renard, the company's president.

The company will be adding a wastewater facility that will allow the business to store up to six months of wastewater at one time.

In Phase 2 of the expansion, set to be completed by the summer of 2023, the company is adding to its current warehouse a new exact weight cutting and packaging area that will create efficiencies.

"This is going to allow us to introduce our products into new markets that we haven't been in before," Chris Renard said.

Today, both the storage and packaging operations are being conducted by third-party companies.

"We will be able to store everything in-house rather than off-site, as we do now. It's hard to manage inventory when you are off site," said Chris Renard.

"Our exact weight cuts also have been outsourced," said Ann Renard. "We were having a difficult time getting our orders filled and when we did, we weren't getting the turn-around times that we needed. This will allow us to do storage and cutting and wrapping all under one roof."

Renard's collects their milk from area farms. Going from 30 million pounds of milk to 120 million isn't too much of a worry for the company, said Chris Renard.

"Currently we have our own farms that are hauling to us. But I also have a list of 16 farms on a waiting list," he said. "They call us every two to three months to see where they are on the waiting list."

While the production will increase ultimately to 12 million pounds of cheese, Chris Renard said the goal is to stay artisan.

The company will be adding open vats manufactured by Ullmer's Dairy Equipment and Koss Industrial will be designing new cheese presses. A new trial vat will be included to allow for experimenting with new cheeses.

"We have added a lot of varieties to our cheese line. We are starting to do a lot of blended cheese. We are not just making plain Cheddar anymore," said Chris Renard.

Renard's Cloverleaf Reserve, a blend of Cheddar and Gruyere, is very popular, he said. Renard's Legacy is a blend of Cheddar and Gouda. Terrific Trio is a fusion of Cheddar, Parmesan, and Gouda.

"Demand for these products has really grown," said Chris Renard. "We've created our own style of cheese. Created our own flavors of cheese. We used to have two or three flavors, but now, man, now we have over 50."

Growing Through Distributors

"The quality of cheese has always been excellent," said Chris Renard. "But now, through our marketing, our name is getting out there. People now know who we are and they know our cheese."

Renard's Cheese is made up of Rosewood Dairy, Inc., the manufacturing arm, while Renard's Cheese Store, LLC is the marketing entity of the operation. Located at the mouth of Door County, WI, Renard's Cheese Store is a destination point before heading into Wisconsin's largest tourist area.

"We used to buy about 25 to 30 percent of our own cheese to supply the store," Ann Renard said. "I would say, now, at our retail store and our own routes, we are probably at 15 percent. Growth is through our distributors. Rosewood loves partnering with distributors. And that is our goal going forward."

Having made a lot of bulk cheese in the past, it left a lot of work for distributors to do before taking those products to market.

"We are making it easier for our cheese to get to market," Ann Renard said. "Being able to cut and wrap to exact weights makes it easier for distributors to get the cheese to market."

We love to work with distributors versus shipping everything out of our location, she said. "It makes it easier. We want customers to go to their local grocery store and find Renard's Cheese. To do that, we need to work through distributors."

To support those relationships, Renard's has been actively promoting its cheese, attending trade shows, and connecting with distributors directly.

"We're normally a quiet bunch, but we have a terrific story to tell and we make great products. We do a lot more marketing now," said Chris Renard. "That didn't happen before and I think that has been a big reason why our cheese is in more demand."

Family Tradition

Chris Renard is a third-generation cheese maker. His grandfather, Howard, and father, Gary, ran Renard's until 2014 when Chris and Ann purchased the operation.

In March of this year, the oldest of four daughters, Samantha, came back to the business full-time. The other three are still too young for business talk.

"The plan is for Samantha to take over someday. She will be the fourth generation here," he said.

"When we purchased the business in 2014, we knew a lot of improvements were needed to be made to the business in order to sustain it," Ann Renard said. "That was our commitment and focus at that time. Now our intention is going in the direction of employee-owned. Our business model hasn't totally changed, it's just great that one of the Renard girls came back and will continue along this journey with us."

For more information on Renard's Cheese, visit *www.renardscheese.com*

Renard's Cheese broke ground last week on an expansion that will ultimately take the plant from 3 miliion pounds of cheese to 12 million. **In the above photo are:** Mike Pribek, plant manager; Ann Renard, president; Chris Renard, vice president; Jean Chase, human resource director; and Joni Nessinger, production manager at Renard's Cheese during groundbreaking events.

Applications Open For Seven WCMA Student Scholarships

Madison—The Wisconsin Cheese Makers Association has opened the application period for student scholarships worth a total of $19,000.

Students connected to the dairy processing industry are invited to apply by Feb. 7. Successful applicants will be announced in March.

Two students will be awarded the WCMA Myron P. "Mike" Dean Cheese Industry Student Scholarship, worth $3,000 each.

Any employee or child of an employee at a WCMA dairy manufacturing, processing, or marketing member company may apply.

Employees or children of employees at WCMA supplier member companies may apply for the WCMA Cheese Industry Supplier Student Scholarship. Three students will receive scholarship awards of $3,000 each.

These scholarships target students attending a college, university, or technical school in the US, or high school seniors registered to attend a qualifying school next fall.

The Association will also select two students to receive the Brian Eggebrecht Student Scholarship Supporting Skilled Trades in the Dairy Industry, worth $2,000 each.

This award, named in honor of Championship Cheese Contest chairman and generous donor Brian Eggebrecht, is open to students attending any technical school in Wisconsin, or high school students registered to attend a Wisconsin technical school.

Priority consideration for the Eggebrecht Scholarship will be given to applicants pursuing technical certificates, technical diplomas, or associate degrees that may lead to a career in the industry.

Applicants for all scholarships must supply school transcripts, a letter of recommendation, and a completed application form. Forms are online at *WisCheeseMakers.org* or by request from WCMA business membership manager Sara Schmidt at (608) 286-1001 or *sschmidt@wischeesemakers.org*.

Calming Benefits Of Dairy-Based Foods Is Focus Of DMI's New Product Competition

Rosemont, IL—The Dairy Management Inc. (DMI) New Product Competition is now accepting applications for innovative products that focus on dairy's qualities related to calming.

The competition, formerly the National Dairy Council New Product Competition, is open to US undergraduate and graduate students to develop products in line with industry and consumer insights to uncover innovative dairy-based products that offer calming benefits.

Research, according to DMI, shows, with a heightened emphasis on mental and emotional well-being, consumers are looking for products that calm; and there is projected growth associated with products that calm, of particular interest with Gen Z consumers.

The deadline for contest submissions is Jan. 16, 2023. For more information, visit *www.usdairy.com/research-resources/new-product-competition*, or email DMI's Rohit Kapoor, at *rohit.kapoor@dairy.org*.

Tetra Pak Announces First Collaboration With Processing Technology Incubator

Lausanne, Switzerland—Tetra Pak recently announced its collaboration with Fresh Start, a food technology incubator that works with a portfolio of start-ups to provide technological solutions to some of the challenges facing global food systems.

As Tetra Pak's first collaboration with a food processing technology incubator, this initiative will combine the company's industry expertise with Fresh Start's innovative approach to drive solutions that will contribute to improving food systems resilience.

Fresh Start's portfolio of solutions includes Bountica, a fermentation-based mechanism that prolongs the shelf life of food and beverage products; and Alteco, a device which helps production facilities manage their energy consumption. Fresh Start is based in Israel.

Through joining forces with Fresh Start, Tetra Pak said it will be able to share its knowledge in developing new food solutions directly with food innovators in Israel through tailored consulting sessions. They will also provide opportunities for the start-ups to engage directly with Tetra Pak, assisting the start-ups as they scale up, with access to product development centers and support for research and development.

"We are excited to collaborate with Fresh Start as together we can push boundaries and perspectives to drive much-needed development and innovation," commented Rodrigo Godoi, vice president processing portfolio management, Tetra Pak. "By working together and combining Tetra Pak's decades of industry experience and expertise with the breakthrough innovations of food incubators such as Fresh Start, we can accelerate new food solutions that create novel avenues for addressing the challenges of the modern food systems," Godoi continued. "Our aim is always to support our customers to continue to produce the most sustainable and nutritious food products around the world."

"Our collaboration with Tetra Pak marks a significant opportunity to accelerate the development of solutions from our start-ups that will prepare our food systems for future use," said Noga Sela Shalev, CEO, Fresh Start. "As a leader in the food technology ecosystem in Israel, Fresh Start is well positioned to support Tetra Pak's innovation interests in the country. The incubator start-ups are at the forefront of food innovation, and we look forward to seeing what they can achieve with Tetra Pak's guidance and support."

Fresh Start is a global food-tech incubator operating under the Israel Innovation Authority incubator program umbrella, part of the emerging agri-food cluster in northern Israel. It is run by a consortium of four leading partners: Tnuva, Israel's largest food manufacturer; Tempo, a leading beverage company; OurCrowd, which is described as Israel's most active venture investor; and Finistere Ventures, a global agri-food venture capital firm.

To date, the incubator has invested in 10 ventures in various fields and technologies throughout the food and beverage value chain, including alternative proteins, extended shelf life, sugar reduction, improved nutritional value, and software solutions for value chain management.

curdbox Engages Subscribers With Allergy-Free Options, Spotify Playlists

curdbox is a cheese subscription service featuring three artisan cheeses, three specialty food pairings, to-go-with wine suggestions, an in-depth blog post, themed Spotify playlist, and Curdcast podcast.

Brookline, MA—A cheese subscription service has successfully evolved to captivate a broad sphere of customers with allergy-friendly collections, social media engagement, and top tier assortments complete with dedicated playlists.

Jenn Mason founded curdbox in 2018 as a scalable version of curds&co., a Brookline, MA-based cheese shop and start-up Mason launched in 2017.

Far from your average cheese club, subscribers can choose from a "curated experience" shipment featuring three artisan cheeses, three specialty food pairings, information card with wine suggestions, in-depth blog post, themed Spotify playlist, and Curdcast podcast.

> **"We're a cheese business. Cheese is made with milk, and that's what we'll continue to promote. There really aren't enough good options to support an always-changing cheese and pairing curation."**
>
> —Jenn Mason, curdbox

Also available is CurdboxFLEX, the nut-free, gluten-free and vegetarian option.

"We saw many of our current subscribers quickly subscribe to the allergy-friendly box as a gift for family," Mason said. "We hope to keep growing this box, and letting people know that you can still eat very delicious food while accommodating dietary needs."

However, curdbox has no immediate plans to include plant-based cheese.

"We're a cheese business. Cheese is made with milk, and that's what we'll continue to promote," Mason said. "There really aren't enough good options to support an always-changing cheese and pairing curation."

The company also recently added wine in three- and six-month subscriptions through wine partner, The Italian Selection.

The subscription price is $49.95 per month, plus shipping. curdbox typically arrives on the third Wednesday of the month.

Each month has a theme, which remains a secret until subscribers open the box. The November box will arrive in time for Thanksgiving, "but it's too late to order, so we aren't going to ruin the surprise for our subscribers," Jenn Mason continued.

April's curdbox selection was "Hot & Melty," giving a wink to National Grilled Cheese Month. It featured three cheeses from Jasper Hill Farm – Cabot Clothbound Cheddar, Whitney and Vault 5, along with Hot Pepper Bacon Jam, Carolina Kettle Bee Sting Sriracha Chips, and Raspberry Mostarda.

Another June curdbox titled "Here Comes the Sun" included Beemster Classic Gouda and Goat Cheese, Flory's Truckle by Milton Creamery, BjornQorn Classic Popcorn, Hot Cobb Jelly, and Pineapple Fruit Crisps.

The accompanying Spotify featured "Sunny Afternoon," the Kinks; "Give it Up," KC & the Sunshine Band; and "Here Comes The Sun," by the Beatles, among other topical hits.

Selections in the "Going Nuts" curdbox were Bandaged Wrapped Cheddar by Fiscalini Farmstead, 36-Month Gouda by Artikaas, and Tres Leches by La Gruta del Sol, paired with Original Blend Pistachios, Guava Paste with Pecans, and Cranberry Hazelnut Crisps.

Recipients were serenaded by The Fratellis' "Got Ma Nuts From a Hippie," and Foo Fighters' "For All the Cows."

"First and foremost, I'm a storyteller and like to find as many ways as possible to engage the senses," Mason said. "Using music just made sense."

The company also puts together a monthly podcast with "some of the nerdy cheese and maker stuff," Mason said.

"We like to tell people that we ship out a cheese-plus pairing experience every month," she said.

"The company's biggest evolution is how many people are sharing a cheese-story-in-a-box with us," Mason said. "We have the opportunity to help tell the world about so many specialty cheese makers, which makes us extremely happy."

"Selecting themes and products is the best part of our job," Mason said. "Of course, we have to fit within our budget, but otherwise – sky's the limit."

We love watching un-boxings that our customers do on social media, because we get to see the joy our little box brings to their kitchen island, coffee table, or girls' night out, Mason continued.

The company just finished planning themes for 2023.

"Honestly, what customers seem to love is opening the box each month, with no idea what kind of tasting trip we're going to take them on," Mason continued.

While curdbox targets all consumers that appreciate good food with its #stopeatingboring hashtag, the company's e-commerce affiliate *shopboardsandco.com* focuses on the intricacies of how to make cheese boards – ideal for that critical Gen Z demographic.

"Gen Z likes our free online classroom and taking our 'Cheese Board Personality' quiz," Mason said. "You just have to meet everyone where they are."

So far, the most challenging aspects of running a successful subscription service are factors beyond our control like shipping issues and supply chain, no matter how much we plan ahead, Mason said.

"Our customers are the best, and are always understanding," Mason said. "Ultimately, we just make sure that delicious food gets to every doorstep and everyone is happy, with a belly full of cheese at the end."

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

Plant Based Foods Institute Launched To Advance Plant-Based Food System

San Francisco, CA—The Plant Based Foods Association (PBFA) announced the launch of the Plant Based Foods Institute (PBFI), a sister non-profit organization to PBFA.

PBFI will work domestically and internationally to identify, implement, and evaluate effective approaches to advance business and policy best practices in support of a regenerative, plant-based food system — one that respects the rights of all animals to live free of exploitation, ensures fairness for farmers and workers, promotes good health and nutrition, is restorative and remains within ecological limits, PBFA explained.

PBFA focuses on championing, elevating, and strengthening its members and the US plant-based foods industry through key policy and marketplace-based initiatives to expand access to plant-based foods. Its goal is to cultivate solutions that shift government and marketplace policies, agricultural practices, and demand toward a regenerative, plant-based system.

PBFI's initiatives include:

■ The Domestic Sourcing Initiative: Connecting plant-based food companies with domestic supply network partners, such as farmers, processors, ingredient suppliers, and manufacturers, creating collaborative opportunities for US farmers and rural communities, developing and advancing policies that support domestic production of plant-based ingredients.

■ Implementing strategies to influence US policy in support of a transition to a sustainable plant-based food system through keystone policy efforts like the Dietary Guidelines for Americans and the 2023 farm bill.

■ Developing industry-standard life cycle assessments to quantifiably demonstrate the environmental benefits that plant-based foods offer over their animal-based counterparts to inform procurement practices and target setting for large buyers, such as retailers and foodservice operators, as a strategy to meet environmental, social, and governance (ESG) goals.

■ Increasing the availability of plant-based foods in institutional and commercial foodservice settings such as schools and hospitals, while supporting the development of a strong distribution pipeline for plant-based foods.

PBFI's focus will be carried into the global arena through the efforts of the International Plant Based Foods Working Group (IPBFWG), a coalition of international plant-based food trade associations.

Members of the board of directors of PBFI include the following: Rachel Dreskin, PBFI and PBFA; Jaime Athos, The Tofurky Company; Matt Dunaj, Follow Your Heart; Liz Ross, Rethink Your Food; Audrey Tran Lam, Center for Energy and Environmental Education within the University of Northern Iowa; Tyler Whitely, Transfarmation Project at Mercy for Animals; and Garrett Broad, Catalysts for Sustainability program at Rowan University.

"Our goal is to create a world where values and business interests harmonize to create a plant-based food system that respects the dignity and health of all living beings and the planet," said Dreskin mentioned.

Arla To Pay Extra If Farmers Undertake Sustainability Activities

Viby J, Denmark—Starting next year, the milk price that an individual Arla Foods farmer will receive from the cooperative will depend on his or her activities related to environmental sustainability.

The co-op is introducing a point-based Sustainability Incentive model, building on data from the Climate Check, to reward current and future sustainability activities on the farm. Arla's board of directors is putting up to three eurocent per kilo of milk on the table annually to fund and motivate environmental improvements on 19 levers.

The three eurocents come on top of the one eurocent that farmers receive for submitting their Climate Check data, which is a pre-condition and the foundation for calculating the individual farmer's incentive. Based on Arla's current owner milk volume, the four eurocents per kilogram of milk amounts to an annual 500 million euros that Arla's board of directors are willing to take from Arla's milk price and redistribute to the farmers based on their individual points in the Sustainability Incentive model.

With the current milk price, it corresponds to approximately 7 percent of the milk price.

The model is a point-based system, in which farmers can collect points based on their activities on the model's 19 different levers.

Eighty points will be available from the start in 2023 and further 20 points for new levers are expected to be built into the model within a few years, for a total of 100 points. For each point that the farmers are able to achieve, they will receive 0.03 eurocent per kilogram of milk. Activities with bigger improvement potential for climate will lead to the most points, and therefore also have the biggest financial incentive.

"The Sustainability Incentive will be an effective tool for driving further improvements," said Peder Tuborgh, CEO of Arla Foods.

Varcode, NPG Partner On Solutions For Distributing Temperature Sensitive Products

Chicago—Varcode, developer of digital collection, recording, tracing, and reporting solutions, said it has finalized a strategic partnership with National Packaging Group (NPG) to develop, manufacture, market, and distribute packaging solutions for distributing temperature-sensitive products.

NPG will integrate Varcode's patented Smart Tag™ technology with its manufacturing businesses, creating a single source for digitally enabled packaging solutions capable of improving the cold chain for food and pharma products.

The agreement also calls for the two companies to jointly coordinate sales of the technologically enhanced packaging products. NPG's parent company, private equity firm Four M Commercial Operations LLC, led Varcode's recent equity investment round with a $3.5 million investment.

Varcode's technology will enable NPG corrugated products to digitally track, analyze, and report cumulative temperature excursions, the announcement stated. The Varcode Smart Data Solution includes temperature-sensitive Smart Tags, a scanning suite to scan the tags, and a management system, where data is permanently stored. The Smart Tag temperature indicator labels record and report if the shipment experienced temperature abuse and the cumulative time of those variances.

NPG and Varcode will begin their partnership with the development and launch of two new product categories: Corrugated SMART Cases for wholesale products stored and transported in temperature-controlled environments, including perishable food products; and SMART Packaging Kits for online groceries, meal kits, and pharmaceuticals delivered directly to consumers or point-of-care facilities in packaging conditions requiring insulation and coolant within the corrugated packaging.

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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**

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Auctions, Events

Dairy Product Stocks in Cold Storage

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

	Stocks in All Warehouses			October 31, 2022 as a % of		Public Warehouse Stocks
	Oct 31 2021	Sept 30 2022	Oct 31 2022	Oct 31 2021	Sept 30 2022	Oct 31 2022
Butter	278,772	267,339	239,555	86	90	218,434
Cheese						
American	843,347	843,113	830,805	99	99	
Swiss	21,363	23,115	21,464	100	93	
Other	583,885	603,568	595,866	102	99	
Total	1,448,595	1,469,796	1,448,135	100	99	1,135,420

Federal Order Class 1 Minimum Prices & Other Advanced Prices - December 2022

Class I Base Price (3.5%)	$22.58 (cwt)
Base Skim Milk Price for Class I	$11.45 (cwt)
Advanced Class III Skim Milk Pricing Factor	$9.63 (cwt)
Advanced Class IV Skim Milk Pricing Factor	$11.78 (cwt)
Advanced Butterfat Pricing Factor	$3.2946 (lb.)
Class II Skim Milk Price	$12.48 (cwt)
Class II Nonfat Solids Price	$1.3867 (lb.)
Two-week Product Price Averages:	
Butter	$2.8921 lb.
Nonfat Dry Milk	$1.4902 lb.
Cheese	$2.0735 lb.
Cheese, US 40-pound blocks	$2.0561 lb.
Cheese, US 500-pound barrels	$2.0613 lb.
Dry Whey	$0.4749 lb.

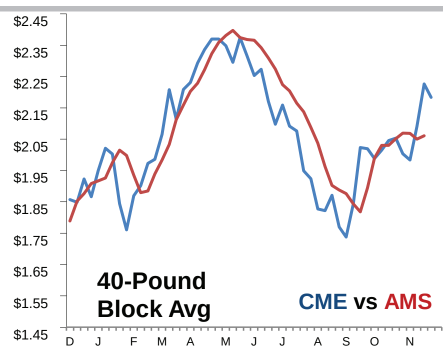
AVG MONTHLY LACTOSE MOSTLY PRICES: USDA

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
'15	.3210	.2870	.2472	.2370	.2354	.2170	.1995	.1912	.1893	.1850	.1851	.1914
'16	.2061	.2166	.2280	.2408	.2551	.2616	.2769	.2948	.3208	.3416	.3525	.3633
'17	.3718	.3750	.3826	.4038	.4100	.3998	.3745	.3435	.2958	.2633	.2417	.2208
'18	.2146	.2159	.2200	.2333	.2573	.2796	.3099	.3254	.3363	.3475	.3510	.3580
'19	.3700	.3639	.3650	.3525	.3339	.3150	.3085	.2973	.2919	.2809	.2884	.2900
'20	.2979	.3043	.3107	.3467	.4018	.4618	.5170	.5136	.5056	.5002	.4751	.4333
'21	.4089	.4145	.4309	.4495	.4500	.4518	.45584	.4534	.4414	.4245	.4129	.4050
'22	.4050	.4050	.4111	.4317	.4363	.4435	.4550	.4550	.4568	.4760		

DAIRY PRODUCT SALES

November 22, 2022—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. 19	Nov. 12	Nov. 5	Oct. 29
40-Pound Block Cheddar Cheese Prices and Sales				
Weighted Price		Dollars/Pound		
US	2.0613	2.0499	2.0688	2.0693
Sales Volume				
US	14,227,610	12,137,360	11,318,665	12,089,798
500-Pound Barrel Cheddar Cheese Prices, Sales & Moisture Contest				
Weighted Price		Dollars/Pound		
US	2.1597	2.1672	2.2253	2.3197
Adjusted to 38% Moisture				
US	2.0588	2.0641	2.1233	2.2165
Sales Volume		Pounds		
US	13,569,686	12,247,921	13,037,885	15,003,428
Weighted Moisture Content		Percent		
US	34.96	34.90	35.02	35.11
AA Butter				
Weighted Price		Dollars/Pound		
US	2.8986	2.8840•	3.1173	3.1406
Sales Volume		Pounds		
US	3,409,749	2,736,592•	2,831,785	4,748,813
Extra Grade Dry Whey Prices				
Weighted Price		Dollars/Pound		
US	0.4678	0.4812	0.4798	0.4667•
Sales Volume				
US	4,271,735	4,859,988	4,777,981	4,506,643•
Extra Grade or USPHS Grade A Nonfat Dry Milk				
Average Price		Dollars/Pound		
US	1.4855	1.4960•	1.5463•	1.5695
Sales Volume		Pounds		
US	19,997,344	16,047,932•	16,085,784	18,997,032

DAIRY FUTURES PRICES

SETTLING PRICE *Cash Settled

Date	Month	Class III	Class IV	Dry Whey	NDM	Block Cheese	Cheese*	Butter*
11-18	Nov 22	21.01	23.35	47.700	150.900	2.066	2.0900	296.075
11-21	Nov 22	21.02	23.35	47.450	150.925	2.066	2.0900	296.100
11-22	Nov 22	21.03	23.35	47.575	150.925	2.066	2.0900	296.700
11-23	Nov 22	21.04	23.35	47.575	150.925	2.066	2.0910	296.000
11-24	Nov 22	—	—	—	—	—	—	—
11-18	Dec 22	21.47	21.70	45.900	145.000	2.200	2.1600	266.500
11-21	Dec 22	21.25	21.70	44.750	144.000	2.200	2.1400	267.750
11-22	Dec 22	21.00	21.69	45.100	144.000	2.180	2.1150	268.850
11-23	Dec 22	20.31	21.69	45.100	144.000	2.145	2.0450	265.750
11-24	Dec 22	—	—	—	—	—	—	—
11-18	Jan 23	20.70	20.96	45.000	141.100	2.085	2.0900	257.000
11-21	Jan 23	20.53	20.96	45.000	140.500	2.085	2.0790	259.000
11-21	Jan 23	20.44	20.90	45.000	140.250	2.080	2.0650	257.500
11-23	Jan 23	20.06	20.90	45.000	140.250	2.045	2.0260	253.225
11-24	Jan 23	—	—	—	—	—	—	—
11-18	Feb 23	20.32	20.68	45.000	140.525	2.031	2.0510	254.175
11-21	Feb 23	19.99	20.60	45.000	139.575	2.031	2.0200	254.175
11-22	Feb 23	19.97	20.60	45.000	138.925	2.031	2.0210	253.175
11-23	Feb 23	19.79	20.60	45.000	138.925	2.010	2.0110	248.000
11-24	Feb 23	—	—	—	—	—	—	—
11-18	Mar 23	20.20	20.58	45.600	141.000	2.055	2.0500	248.425
11-21	Mar 23	19.95	20.58	45.600	140.525	2.044	2.0250	248.425
11-22	Mar 23	19.97	20.49	45.600	139.400	2.033	2.0200	248.425
11-23	Mar 23	19.80	20.49	45.600	139.400	2.015	2.0090	245.000
11-24	Mar 23	—	—	—	—	—	—	—
11-18	Apr 23	20.10	20.46	46.250	142.000	2.041	2.0350	246.850
11-21	Apr 23	19.92	20.40	46.250	141.300	2.041	2.0100	247.000
11-22	Apr 23	19.95	20.40	46.250	140.500	2.034	2.0130	247.000
11-23	Apr 23	19.88	20.40	46.250	140.500	2.034	2.0130	244.000
11-24	Apr 23	—	—	—	—	—	—	—
11-18	May 23	20.10	20.49	46.000	142.300	2.041	2.0400	247.000
11-21	May 23	20.00	20.38	45.000	141.150	2.041	2.0250	246.500
11-22	May 23	20.01	20.25	45.100	141.000	2.039	2.0250	246.250
11-23	May 23	19.87	20.25	45.100	141.000	2.034	2.0200	243.000
11-24	May 23	—	—	—	—	—	—	—
11-18	June 23	20.15	20.58	46.250	142.600	2.053	2.0450	246.850
11-21	June 23	20.00	20.58	46.250	142.025	2.053	2.0390	246.000
11-22	June 22	20.10	20.51	46.000	142.700	2.048	2.0290	245.500
11-23	June 23	20.00	20.51	46.000	142.700	2.046	2.0240	242.500
11-24	June 23	—	—	—	—	—	—	—
11-18	July 23	20.13	20.70	47.500	143.150	2.076	2.0600	247.000
11-21	July 23	20.14	20.60	47.500	143.150	2.076	2.0430	247.000
11-22	July 23	20.20	20.60	47.500	143.200	2.072	2.0400	247.000
11-23	July 23	20.15	20.60	47.500	143.200	2.072	2.0380	247.000
11-24	July 23	—	—	—	—	—	—	—
11-18	Aug 23	20.24	20.74	47.525	144.400	2.069	2.0650	245.500
11-21	Aug 23	20.26	20.74	47.525	143.500	2.069	2.0490	245.500
11-22	Aug 23	20.25	20.71	47.525	143.800	2.069	2.0490	245.500
11-23	Aug 23	20.20	20.71	47.525	143.800	2.069	2.0450	245.500
11-24	Aug 23	—	—	—	—	—	—	—
11-18	Sept 23	20.20	20.73	47.525	144.500	2.076	2.0690	247.000
11-21	Sept 23	20.25	20.73	47.525	145.000	2.076	2.0480	245.175
11-22	Sept 23	20.25	20.64	47.525	143.900	2.076	2.0480	245.175
11-23	Sept 23	20.15	20.64	47.525	143.900	2.060	2.0440	245.175
11-24	Sept 23	—	—	—	—	—	—	—
Nov. 23		**24,469**	**11,627**	**2,374**	**9,457**	**784**	**17,003**	**9,054**

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DAIRY PRODUCT MARKETS

AS REPORTED BY THE US DEPARTMENT OF AGRICULTURE

WHOLESALE CHEESE MARKETS

NORTHEAST - NOV. 22: Cheese makers are running active production schedules, as milk is available for Class III production. Some plant managers say labor shortages and delayed deliveries of production supplies are limiting their ability to operate at or near capacity. Foodservice demand for cheese is steady this week. Some regional restauranteurs are operating reduced hours around the holiday. Contacts report strong demand from retailers as some purchasers continue to acquire loads in preparation for end of year holidays. International demand for cheese is unchanged. Cheese inventories are available, though some spot purchasers say loads are tightening.

Wholesale prices, delivered, dollars per/lb:

Cheddar 40-lb block:	$2.6875 - $2.9750	Process 5-lb sliced:	$2.1050 - $2.5850
Muenster:	$2.6750 - $3.0250	Swiss Cuts 10-14 lbs:	$3.7200 - $6.0425

MIDWEST AREA - NOV. 22: Cheese production schedules vary from one plant to the next. Some are down one to two extra days this week. Others say they have no plans to slow down production over the holiday, particularly with a notable decline in spot milk pricing. Some plant managers are finding extra milk in a somewhat consistent range with previous weeks, while others are reporting discounts as low as $4.50 under Class over the week/weekend. There have been some recent production snags, with lines being down for various maintenance and/or updates. Still, cheese availability varies widely by variety. Curd and barrel producers say late-year orders really slowed down, while producers of retail/food service Cheddar and Italian styles are busy fulfilling orders. Cheese market tones are uncertain. The block and barrel price spread is atypically large, and market prices met some downward pressure early in the week.

Wholesale prices delivered, dollars per/lb:

Blue 5# Loaf :	$2.7300 - $3.9400	Mozzarella 5-6#:	$2.2600 - $3.3475
Brick 5# Loaf:	$2.4600 - $3.0275	Muenster 5#:	$2.4600 - $3.0275
Cheddar 40# Block:	$2.1825 - $2.7200	Process 5# Loaf:	$1.9825 - $2.4500
Monterey Jack 10#:	$2.4350 - $2.7825	Swiss 6-9# Cuts:	$3.2350 - $3.3375

WEST - NOV. 22: Retail demand for cheese is steady, though foodservice demand is mixed. Contacts note restaurants in the region are operating reduced hours around Thanksgiving, while some say increased traveling this week may contribute to higher sales for restaurants that are open. Export cheese demand is strong, as domestically produced loads are being sold at a discount to loads produced in other countries. Some purchasers in Asian markets are ordering loads of cheese to ship in Q2 of 2023. Spot purchasers say cheese is available on the spot market, but barrel inventories are more ample than blocks. Milk is available for cheese makers to run busy production schedules. Some plant managers say labor shortages and delayed deliveries of production supplies are limiting their ability to operate full production schedules.

Wholesale prices delivered, dollars per/lb:

Cheddar 10# Cuts:	$2.5625 - $2.7625	Monterey Jack 10#:	$2.5500 - $2.8250
Cheddar 40# Block:	$2.3150 - $2.8050	Process 5# Loaf:	$2.1075 - $2.2625
		Swiss 6-9# Cuts:	$2.5275 - $3.9575

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

Variety	Date: 11/23	11/16	Variety	Date: 11/23	11/16
Cheddar Curd	$2.43	$2.46	Mild Cheddar	$2.45	$2.47
Young Gouda	$2.10	$2.19	Mozzarella	$2.11	$2.17

FOREIGN -TYPE CHEESE - NOV. 22: Demand for European cheese in the food retail sector is active. While consumers have shifted their buying habits to smaller packaged, private label, and discounted cheeses to combat the effects of inflation, the pull on cheese supplies is still strong. And although production is in relatively good balance with demand, at times deliveries need to be shorted or delayed for some varieties. Demand from foodservice and food processing is less energetic. Cheese is moving satisfactorily through contracted shipments, but additional sales are running into more competition and less vigorous interest from buyers. It has become more common for cheese customers to push back on commercial contracted shipments due to economic uncertainties. Negotiations for Q1 and 2023 cheese contracts are well underway, but it has been more difficult for buyers and sellers to find the common ground.

Selling prices, delivered, dollars per/lb:	Imported	Domestic
Blue:	$2.6400 - 5.2300	$2.5450 - 4.0325
Gorgonzola:	$3.6900 - 5.7400	$3.0525 - 3.7700
Parmesan (Italy):	0	$3.9325 - 6.0225
Romano (Cows Milk):	0	$3.7350 - 5.8900
Sardo Romano (Argentine):	$2.8500 - 4.7800	0
Reggianito (Argentine):	$3.2900 - 4.7800	0
Jarlsberg (Brand):	$2.9500 - 6.4500	0
Swiss Cuts Switzerland:	0	$3.7550 - 4.0800
Swiss Cuts Finnish:	$2.6700- 2.9300	0

NDM PRODUCTS - NOVEMBER 22

NDM - CENTRAL: Low/medium NDM prices did not change during the shortened holiday week. CME prices have moved into the low $1.40s, while reported spot trades were generally in step with previous weeks, from the low to mid $1.40s for the most part on limited trading activity. Milk availability has grown in recent weeks. Despite a winter-like weekend in the Midwest, current and near-term forecasts are expected to maintain cow comfort at least for the week to come. Condensed skim availability has been more balanced, or slightly tight, for production in recent weeks. High heat NDM prices are unchanged on slower trading, as well.

NDM - WEST: Domestic demand for low/medium heat NDM is steady, and international sales are unchanged. Loads of low/medium heat NDM are available for spot purchasing. Drying operations are running steady production schedules, as milk remains available. Some plant managers are operating below capacity due to labor shortages and delayed deliveries of production supplies. High heat NDM production remains limited, and spot inventories are tight. Demand for high heat NDM is strong.

NDM - EAST: Eastern trading of low/medium heat NDM was limited, but there were some prices from the eastern region representing the low end of the range. Overall, prices are unchanged on the low, medium and high heat NDM price range and mostly series. Condensed skim availability is unchanged, but processing plants are varied on their upcoming scheduled days off.

NATIONAL - CONVENTIONAL DAIRY PRODUCTS

Total conventional dairy ads decreased 1 percent, while total organic dairy ads increased by 3 percent. Conventional ice cream in 48- to 64-ounce containers remained the most advertised dairy product, appearing in 2 percent more ads with an average price of $3.51.

Conventional 8-ounce shred packages of cheese appeared in 12 percent fewer ads, and the average advertised price dropped by 17 cents to $2.29. Meanwhile, 8-ounce block cheese appeared in 5 percent fewer ads with an average price of $2.21. There were no ads for organic cheese.

Conventional milk ads grew by 73 percent, while organic milk ads declined by 8 percent. Ads for gallon containers of conventional milk increased by 25 percent with an average price $2.87. Meanwhile, gallon sized organic milk ads increased by 53 percent, with an average price of $5.51. Conventional yogurt ads fell by 3 percent, while there were no organic yogurt ads. The most advertised yogurt item was Greek style yogurt in 4- to 6-ounce containers, with an average price of $1.04, down 2 cents from last period.

RETAIL PRICES - CONVENTIONAL DAIRY - NOVEMBER 23

Commodity	US	NE	SE	MID	SC	SW	NW
Butter 1#	3.92	4.25	3.94	3.89	3.52	3.73	3.59
Cheese 8 oz block	2.21	2.29	2.15	2.20	2.17	2.18	1.99
Cheese 1# block	5.02	4.90	5.99	NA	NA	4.28	NA
Cheese 2# block	6.74	6.85	NA	NA	6.99	5.99	6.73
Cheese 8 oz shred	2.29	2.39	2.16	2.19	2.21	2.20	2.38
Cheese 1# shred	4.09	4.29	3.99	NA	3.99	3.98	3.98
Cottage Cheese	2.64	2.94	2.50	NA	NA	2.25	2.50
Cream Cheese	2.37	2.21	2.50	2.31	2.36	2.39	2.06
Egg Nog quart	4.01	4.47	NA	3.50	2.99	3.50	3.36
Egg Nog ½ gallon	4.50	5.82	3.99	3.99	4.59	4.21	3.99
Ice Cream 48-64 oz	3.51	3.52	3.25	3.84	3.32	3.63	3.91
Milk ½ gallon	2.47	2.66	2.49	2.29	NA	1.59	2.66
Milk gallon	2.87	2.84	3.49	3.19	NA	2.59	2.84
Sour Cream 16 oz	2.17	2.18	2.15	2.16	2.12	2.14	2.24
Yogurt (Greek) 4-6 oz	1.04	1.08	NA	1.10	1.25	.83	.88
Yogurt (Greek) 32 oz	4.47	5.18	NA	NA	NA	3.54	5.18
Yogurt 4-6 oz	.58	.63	.56	.70	.55	.53	.60
Yogurt 32 oz	2.56	2.68	NA	NA	NA	2.43	2.36

US: National **Northeast (NE):** CT, DE, MA, MD, ME, NH, NJ, NY, PA, RI, VT; **Southeast (SE):** AL, FL, GA, MD, NC, SC, TN, VA, WV; **Midwest (MID):** IA, IL, IN, KY, MI, MN, ND, NE, OH, SD, WI; **South Central (SC):** AK, CO, KS, LA, MO, NM, OK, TX; **Southwest (SW):** AZ, CA, NV, UT; **Northwest (NW):** ID, MT, OR, WA, WY

ORGANIC DAIRY - RETAIL OVERVIEW

National Weighted Retail Avg Price:			
Butter 1 lb:	$6.13	Greek Yogurt 4-6 oz:	NA
Cheese 8 oz shred:	NA	Greek Yogurt 32 oz:	NA
Cheese 8 oz block:	NA	UHT Milk 8 oz:	NA
Cream Cheese 8 oz:	$2.99	Milk ½ gallon:	$3.80
Yogurt 4-6 oz:	NA	Milk gallon:	$5.51
Yogurt 32 oz:	NA	Sour Cream 16 oz:	$2.82
		Ice Cream 48-64 oz:	$6.99

WHOLESALE BUTTER MARKETS - NOVEMBER 22

NATIONAL: In the Central and West regions, cream is becoming more available and butter makers are running busier production schedules. Contacts in these regions say cream multiples are edging lower, though some in the Central region suggest cream availability may tighten. In the East, butter makers are utilizing volumes of cream to make more butter than they have in previous years. Some contacts in the West say retail sales are trending higher as grocers are purchasing for end of year holidays.

WEST: Milk production is steady to higher in the West, and some contacts say this is contributing to increased cream availability. Strong demand is present for cream, though some contacts say they had additional loads for sale, at lower multiples, ahead of the holiday. Strong demand is present for cream from butter makers and Class II processors. Some butter makers are opting to buy discounted loads of cream to run active production schedules throughout Thanksgiving week. Labor shortages are causing some production facilities to operate reduced hours. Demand for butter is steady from both retail and foodservice customers. Some grocers are, reportedly, ordering loads of butter in preparation for end of year holidays. Bulk butter purchasers are actively searching for loads of butter, while spot inventories remain tight. Bulk butter overages range from 7.0 to 18.0 cents above the market value.

CENTRAL: Butter producers are staying somewhat busy during the week, although there are plants with upcoming days off later this week and weekend. Some, though, are running through the weekend with spot loads of cream running at multiples reported below 1.20 for the second week in a row. Some plant managers say they are behind on order fulfillment and are churning as much as possible with current holiday related cream availability. Butter market tones continue to find bullish tailwinds, defying some contacts' expectations, as they moved up nearly a dime on Monday.

NORTHEAST: Amidst the holiday week, butter makers are finding a few more loads of cream available. Ice cream manufacturing has tapered off, freeing up some cream. Bulk and packaged butter inventories are tight. Butter manufacturers are thankful to have the cream and are actively churning to try to stay ahead of winter holiday baking demand. Retail stores are restocking ahead of the next wave of winter holiday needs.

WEEKLY COLD STORAGE HOLDINGS

SELECTED STORAGE CENTERS IN 1,000 POUNDS - INCLUDING GOVERNMENT

DATE	BUTTER	CHEESE
11/21/22	28,026	76,777
11/01/22	40,818	81,284
Change	-12,792	-4,507
Percent Change	-31	-6

CME CASH PRICES - NOVEMBER 21 - 25, 2022

Visit www.cheesereporter.com for daily prices

	500-LB CHEDDAR	40-LB CHEDDAR	AA BUTTER	GRADE A NFDM	DRY WHEY
MONDAY November 21	$1.8425 (-8½)	$2.2000 (-3¼)	$2.9000 (+9)	$1.4275 (NC)	$0.4400 (NC)
TUESDAY November 22	$1.8050 (-3¾)	$2.2000 (NC)	$2.9300 (+3)	$1.4175 (-1)	$0.4400 (NC)
WEDNESDAY November 23	$1.8175 (+1¼)	$2.1500 (-5)	$2.9475 (+1¾)	$1.3975 (-2)	$0.4400 (NC)
THURSDAY November 24	No Trading	No Trading	No Trading	No Trading	No Trading
FRIDAY November 25	No Trading	No Trading	No Trading	No Trading	No Trading
Week's AVG $ Change	**$1.8217 (-0.1873)**	**$2.1833 (-0.0427)**	**$2.9258 (+0.0113)**	**$1.4142 (+0.0263)**	**$0.4400 (NC)**
Last Week's AVG	**$2.0090**	**$2.2260**	**$2.9145**	**$1.4405**	**$0.4400**
2021 AVG Same Week	**$1.5200**	**$1.8575**	**$1.9900**	**$1.56583**	**$0.7000**

MARKET OPINION - CHEESE REPORTER

Cheese Comment: No blocks were sold Monday; the price declined on an uncovered offer of 2 cars at $2.2000. There was no block market activity whatsoever on Tuesday. No blocks were sold Wednesday; the price declined on an uncovered offer of 1 car at $2.1500. The barrel price dropped Monday on a sale at $1.8425, declined Tuesday on a sale at $1.8050, then increased Wednesday on an unfilled bid for 1 car at $1.8175. There were no blocks traded this week and only 6 carloads have been sold in November on the CME. There have been 26 carloads of barrels sold in November so far, 2 this week.

Butter Comment: The price jumped Monday on a sale at $2.9000, increased Tuesday on a sale at $2.9300, and rose Wednesday on an uncovered offer at $2.9475 (following a sale at $2.9550). There have been 60 carloads of butter traded this month so far on the CME.

Nonfat Dry Milk Comment: The price declined Tuesday on an uncovered offer at $1.4175, and fell Wednesday on a sale at $1.3975. There have been 39 carloads of NDM traded this month on the CME.

Dry Whey Comment: The price remained unchanged at 44.0 cents all week.

WHEY MARKETS - NOVEMBER 21 - 25, 2022

RELEASE DATE - NOVEMBER 22, 2022

Animal Feed Whey—Central: Milk Replacer: .3000 (NC) – .3500 (NC)

Buttermilk Powder:
Central & East: 1.4200 (NC) – 1.6000 (-2½) West: 1.3500 (NC) –1.7400 (NC)
Mostly: 1.5275 (-2¼) – 1.6425 (-3¼)

Casein: Rennet: 5.7400 (NC) – 6.2000 (NC) Acid: 6.5000 (NC) – 6.7500 (NC)

Dry Whey—Central (Edible):
Nonhygroscopic: .3800 (NC) – .5100 (NC) Mostly: .4300 (NC) – .4500 (NC)

Dry Whey–West (Edible):
Nonhygroscopic: .3900 (NC) – .5400 (-¼) Mostly: .4400 (NC) – .5300 (NC)

Dry Whey—NorthEast: .4150 (-½) – .5100 (-¼)

Lactose—Central and West:
Edible: .3500 (NC) – .6000 (NC) Mostly: .4500 (NC) – .5200 (NC)

Nonfat Dry Milk —Central & East:
Low/Medium Heat: 1.3800 (NC) – 1.4900 (NC) Mostly: 1.4300 (NC) – 1.4600 (NC)
High Heat: 1.5700 (NC) – 1.6500 (NC)

Nonfat Dry Milk —Western:
Low/Medium Heat: 1.3800 (+3¼) – 1.5700 (-3¾) Mostly: 1.4400 (+2) – 1.5200 (+2½)
High Heat: 1.5300 (+4¼) – 1.6575 (NC)

Whey Protein Concentrate—34% Protein:
Central & West: 1.4500 (NC) – 1.9925 (NC) Mostly: 1.7000 (NC) –1.9150 (NC)

Whole Milk—National: 2.4000 (NC) – 2.5000 (NC)

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		

USDA Seeks Cheese

(Continued from p. 1)

Under the solicitation released last Friday, USDA is specifically seeking 554,400 pounds of yellow Cheddar cheese chunks, 12/2-pound packages; 529,200 pounds of yellow Cheddar chunks, 12/1-pound packages; 470,400 pounds of shredded yellow Cheddar cheese, 6/2-pound packages; and 554,400 pounds of blended American skim processed cheese, 12/2-pound loaves.

Bids are due by 2:00 p.m. Central time on Thursday, Dec. 1, 2022. The acquisition is unrestricted. Offers must be submitted electronically via the Web-Based Supply Chain Management System (WBSCM).

Commodities and the products of agricultural commodities acquired under this contract must be a product of the US and will be considered to be such a product if it is grown, processed, and otherwise prepared for sale or distribution exclusively in the US. Packaging and container components under this acquisition will be the only portion subject to the WTO Government Procurement Agreement and Free Trade Agreements.

Offerors are urged to review all documents as they pertain to this program, including the latest applicable commodity specification(s) identified in the solicitation, the AMS Master Solicitation for Commodity Procurements (MSCP); and Qualification Requirements for Prospective Contractors Selling Commodities to USDA.

To be eligible to submit offers, potential contractors must meet the AMS vendor qualification requirements. The AMS points of contact for new vendors are Andrea Lang, who can be reached by phone at (202) 720-4237, and Diana Dau, at (202) 378-1075; or by email to NewVendor@usda.gov.

Questions regarding this procurement should be directed to Hilary Cole, at *hilary.cole@usda.gov*. For more information about selling dairy products to USDA, visit *www.ams.usda.gov/selling-food*.

In other USDA dairy procurement developments, USDA on Monday announced the awarding of a contract to Chobani LLC for a total of 678,984 pounds of high protein yogurt for delivery during the first three months of 2023. The total price of the yogurt is $1,163,074.32.

USDA is specifically purchasing 198,678 pounds of high protein blueberry yogurt, 24/4-ounce cups; 303,462 pounds of high protein strawberry yogurt, 24/4-ounce cups; 139,080 pounds of high protein vanilla yogurt, 24/4-ounce cups; and 37,764 pounds of high protein vanilla yogurt, 6/32-ounce tubs.