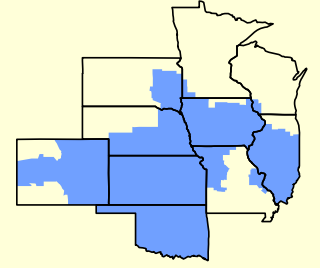


AUGUST 2023

Marketing Service

Bulletin



CENTRAL MARKETING AREA



Facilitating the efficient marketing of milk and dairy products.

Where's The Milk ???

Milk production in the United States surpassed 226 billion pounds in 2022, increasing by 0.1% compared with 2021. The 226.5 billion pounds produced in 2022 represent an increase of approximately 269 thousand pounds over the previous all-time high of 226.3 billion pounds recorded in 2021. Milk production has exceeded prior year levels in 24 of the last 26 years, with 2009 and 2001 being the two exceptions. Since 1991, U.S. milk production has decreased from prior year levels only four times -- 1993, 1996, 2001, and 2009.

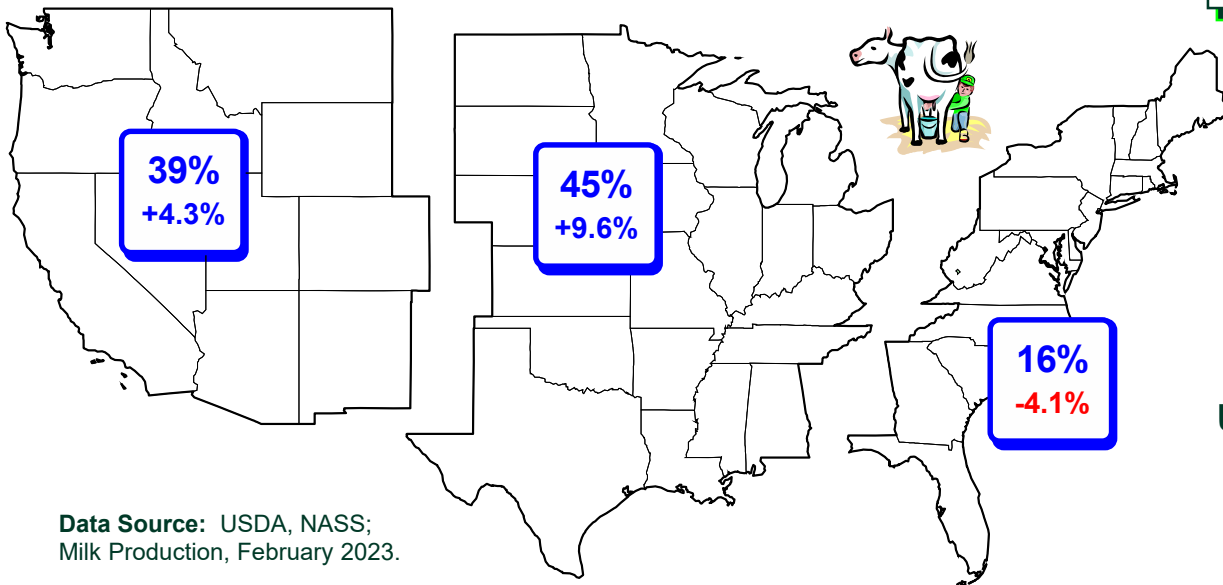


This bulletin addresses the question, "Where's The Milk ?", by examining milk production and dairy product manufacturing on a regional basis. The map graphics and data tables contained in this bulletin depict production of milk, cheese, butter, yogurt, ice cream, dry whey, and nonfat dry milk for the Atlantic, Central, and West Regions, as specified by the National Agricultural Statistics Service (NASS). The top number shown in each region represents the region's proportion of total 2022 production for the specified product, while the bottom number represents the percentage change in production comparing 2022 with 2017.

Comparing 2022 with 2017, the **Central and West Regions increased** milk production by 9.6% and 4.3%, respectively, while the **Atlantic Region decreased** by 4.1%. The **Central Region** accounted for 44.79% of total U.S. Production, **up** 1.85 percentage points compared with 2017 (42.94%). The **West Region** accounted for 38.84% of U.S. Milk production in 2022, which was **down** 0.28 percentage points compared with the proportion in 2017 (39.12%). The **Atlantic Region** accounted for the smallest proportion of the 2022 total at 16.37%, and this proportion was **down** 1.57 percentage points compared with 2017 (17.94%). Milk production data for 2017 through 2022 are detailed on the last page of this bulletin.

U.S. milk production in 2022 increased by 10.9 billion pounds compared with 2017. The additional milk required to meet increased cheese production during the same period was approximately 14.2 billion pounds.

Regional Milk Production as a Percentage of 2022 Total U.S. Milk Production with Percentage Change in Production: 2022 vs 2017



U.S. Change '22 vs '17
+5.1%

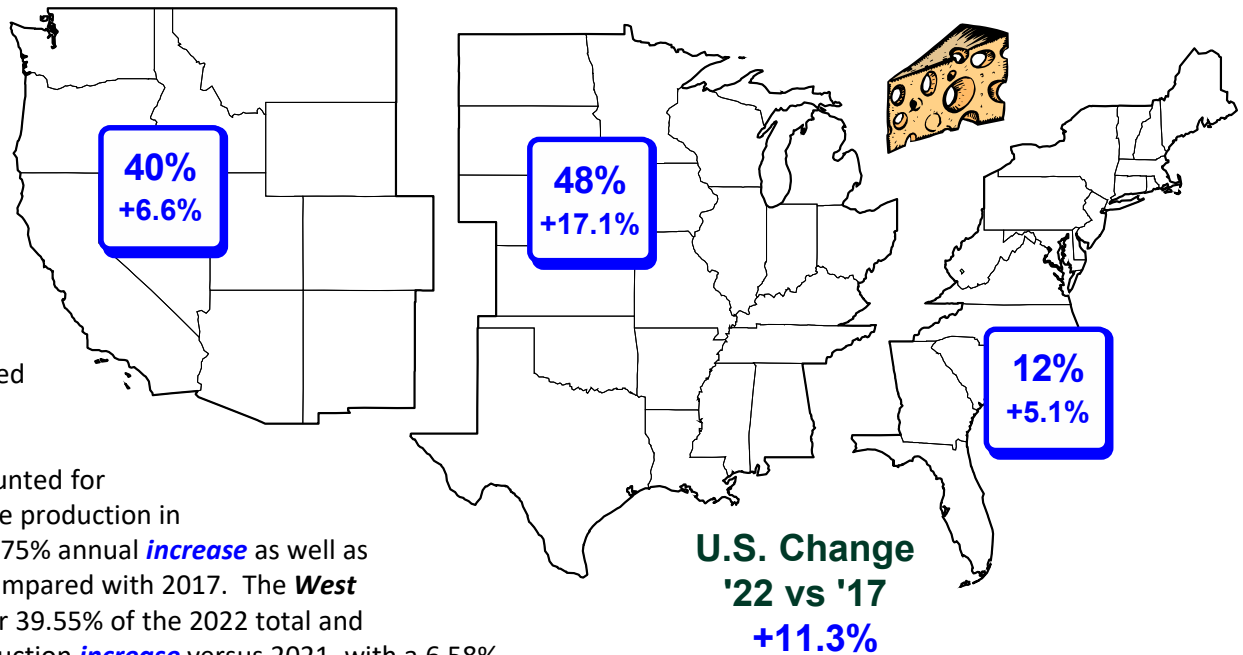
Data Source: USDA, NASS; Milk Production, February 2023.

Regional Cheese Production as a Percentage of 2022 Total U.S. Cheese Production with Percentage Change in Production: 2022 vs 2017

U.S. cheese production totaled 14.063 billion pounds during 2022. The 2022 total is an **increase** of 2.60% compared with 2021, and it is 11.26% **greater than** the amount produced in 2017.

As depicted by the map on this page, all three regions recorded **increases** comparing 2022 with 2017. The

Central Region accounted for 48.77% of U.S. cheese production in 2022 and posted a 3.75% annual **increase** as well as a 17.06% **increase** compared with 2017. The **West Region** accounted for 39.55% of the 2022 total and posted a 1.51% production **increase** versus 2021, with a 6.58% **increase** compared with 2017. The **Atlantic Region** accounted for 11.68% of the 2022 U.S. total, and this region's cheese production **increased** by 1.59% versus the previous year also **increasing** 5.11% comparing 2022 with 2017.



Data Source: USDA, NASS; Dairy Products 2022 Summary, Feb 2023.

Total U.S. Cheese Production By Region (thousand lbs.)

	Atlantic	Central	West	Total
2017	1,562,164	5,859,451	5,218,347	12,639,962
2018	1,582,777	6,000,383	5,454,216	13,037,376
2019	1,595,969	5,998,535	5,542,782	13,137,286
2020	1,635,423	6,160,722	5,443,495	13,239,640
2021	1,616,347	6,611,126	5,479,093	13,706,566
2022	1,642,025	6,859,160	5,561,590	14,062,775

The Central Region has accounted for the largest proportion of cheese production each year since 2008, and its share has been increasing since 2020. The West Region accounts for the second largest proportion, and its share increased in 2019, but has declined every year since then. The Atlantic Region's share increased in 2019 & 2020, but decreased in 2021 & 2022.

As a Percent of Total Production

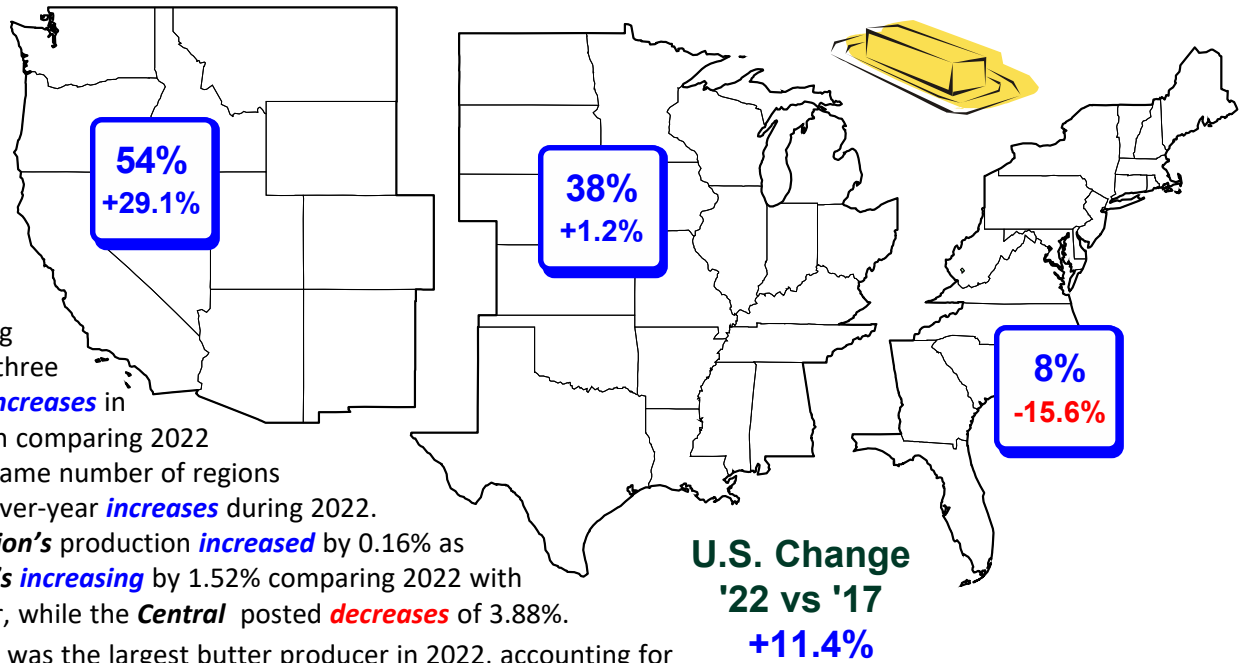
	Atlantic	Central	West
2017	12.36	46.36	41.28
2018	12.14	46.02	41.84
2019	12.15	45.66	42.19
2020	12.35	46.53	41.12
2021	11.79	48.23	39.98
2022	11.68	48.77	39.55



Regional Butter Production as a Percentage of 2022 Total U.S. Butter Production with Percentage Change in Production: 2022 vs 2017

U.S. butter production **increased** 11.44%, comparing 2022 with 2017. Butter production totaled 2.059 billion pounds during 2022 -- **down** 0.63% from 2021.

As depicted by the accompanying map, two of the three Regions posted **increases** in butter production comparing 2022 with 2017. The same number of regions registered year-over-year **increases** during 2022. The **Atlantic Region's** production **increased** by 0.16% as well as the **West's increasing** by 1.52% comparing 2022 with the previous year, while the **Central** posted **decreases** of 3.88%. The **West Region** was the largest butter producer in 2022, accounting for 54.29% of the U.S. total, followed by the **Central Region** with 37.52%. The **Atlantic Region** accounted for just 8.20% of the U.S. total in 2022, and its share has been below 10% during each of the last five years.



Data Source: USDA, NASS; Dairy Products 2022 Summary, Feb 2023.

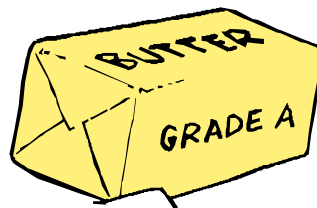
Total U.S. Butter Production By Region (thousand lbs.)

	Atlantic	Central	West	Total
2017	200,011	781,854	865,608	1,847,473
2018	186,828	777,638	1,003,804	1,968,270
2019	189,180	772,745	1,032,183	1,994,108
2020	198,973	833,806	1,113,123	2,145,902
2021	168,480	802,339	1,100,897	2,071,716
2022	168,751	772,340	1,117,646	2,058,737

As a Percent of Total Production

	Atlantic	Central	West
2017	10.83	42.32	46.85
2018	9.49	39.51	51.00
2019	9.49	38.75	51.76
2020	9.27	38.86	51.87
2021	8.13	38.73	53.14
2022	8.20	37.52	54.29

During the last 20 years the Central Region's share of U.S. butter production ranged from a high of 47.89% in 2002 to a low of 36.66% in 2010, and has declined in 14 of the last 20 years. After increasing in 2020, the Central's share has continued to decline since then. The West Region increased its proportion from 41.09% in 2002 to 53.93% in 2010, and its share has been the largest each year since 2006. The West's share increased over the past five years to 54.29% in 2022. The Atlantic Region accounted for just 8.20% of total production during 2022 an increase of .07 percentage points

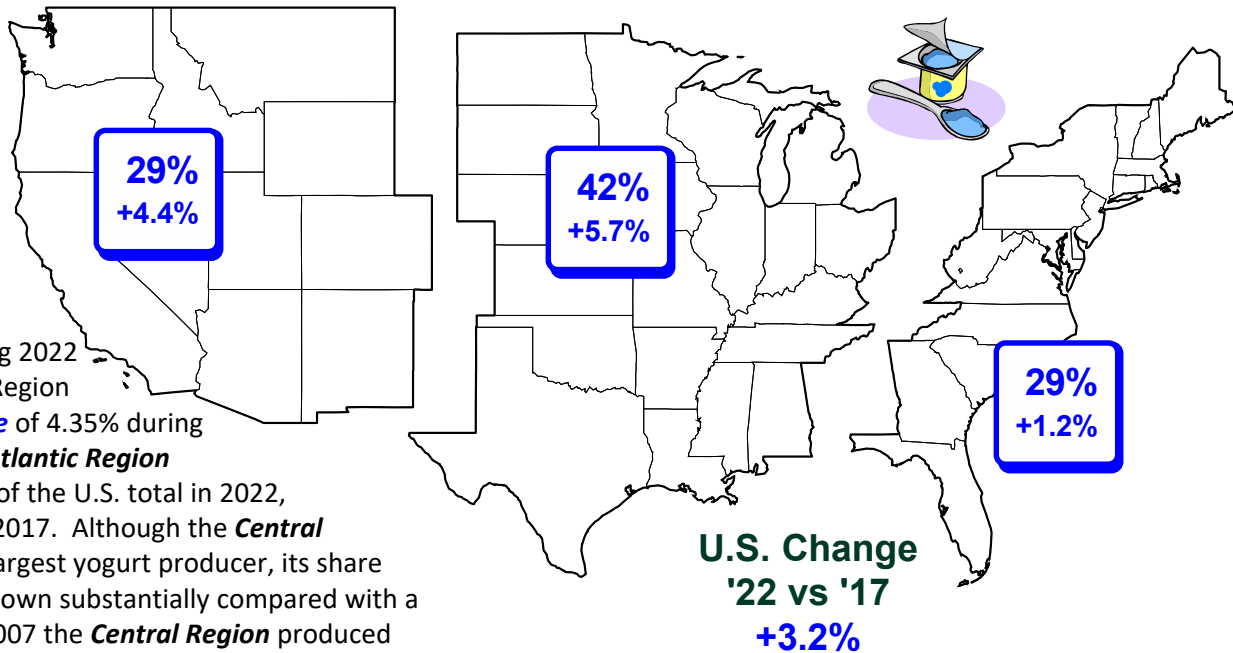


U.S. yogurt production **increased** by 3.25% comparing 2022 with 2017. Annual yogurt production decreased during 2022, totaling 4.623 billion pounds, an **decrease** of 2.52% compared with 2021.

The Atlantic and Central Regions

increased production by 1.18% and 5.73%, respectively, comparing 2022 with 2017. The West Region also posted an **increase** of 4.35% during this time frame. The **Atlantic Region** accounted for 28.97% of the U.S. total in 2022, **down** from 30.27% in 2017. Although the **Central Region** is the nations largest yogurt producer, its share of total production is down substantially compared with a few years earlier. In 2007 the **Central Region** produced 52.47% of the U.S. total, while it accounted for 42.15% in 2022. The **West Region** accounted for 28.88% of total U.S. yogurt production in 2022, **up** from 28.57% in 2017. This region's share of total yogurt production was **down** 0.42 percentage points from the proportion recorded the previous year.

Regional Yogurt Production as a Percentage of 2022 Total U.S. Yogurt Production with Percentage Change in Production: 2022 vs 2017



Data Source: USDA, NASS; Dairy Products 2022 Summary, Feb 2023.

Total U.S. Yogurt Production By Region (thousand lbs.)

	Atlantic	Central	West	Total
2017	1,355,387	1,843,317	1,279,500	4,478,204
2018	1,337,492	1,848,181	1,266,955	4,452,628
2019	1,248,663	1,931,791	1,197,349	4,377,803
2020	1,287,343	1,990,110	1,232,407	4,509,860
2021	1,355,355	1,998,119	1,389,753	4,743,227
2022	1,339,503	1,948,945	1,335,112	4,623,560

As a Percent of Total Production

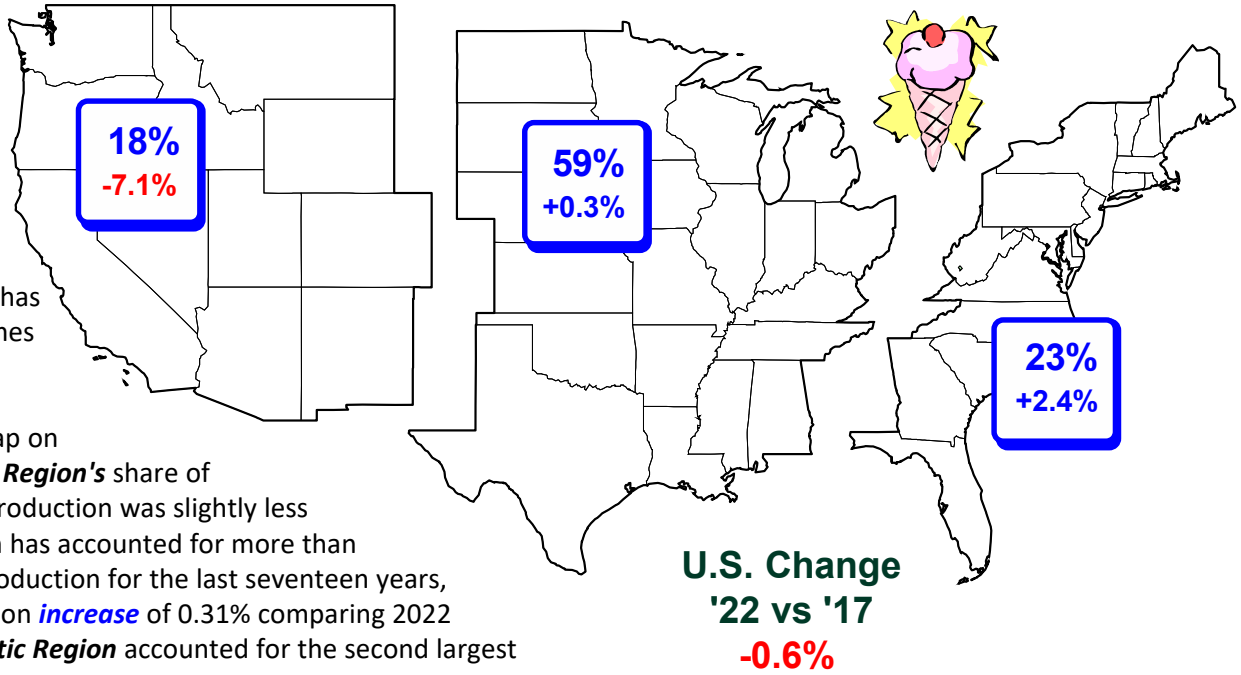
	Atlantic	Central	West
2017	30.27	41.16	28.57
2018	30.04	41.51	28.45
2019	28.52	44.13	27.35
2020	28.55	44.12	27.33
2021	28.57	42.13	29.30
2022	28.97	42.15	28.88

The Atlantic Region's share of U.S. yogurt production increased from 23.54% in 2007 to 34.42% in 2012, but has since declined to 28.97%. The West Region's share decreased slightly in 2022, after a recent increase during the previous year. The Central Region's proportion stayed below the 44% it reached in 2020, and is substantially below the 52.47% recorded in 2007. Yearly yogurt production decreased by 2.53% in 2022, and it was 3.25% more than the amount produced in 2017.



U.S. ice cream production* **decreased** by 0.61% comparing 2022's total with the 731.2 million gallons produced in 2017. Ice cream production totaled 726.7 million gallons during 2022, **up** 0.54% from the previous year. Yearly ice cream production has increased only five times since 2005.

Regional Ice Cream Production* as a Percentage of 2022 Total U.S. Ice Cream Production with Percentage Change in Production: 2022 vs 2017



As depicted by the map on this page, the **Central Region's** share of 2022 U.S. ice cream production was slightly less than 60%. This region has accounted for more than 50% of total yearly production for the last seventeen years, and posted a production **increase** of 0.31% comparing 2022 with 2017. The **Atlantic Region** accounted for the second largest proportion of the U.S. total at 23.07%, and registered an **increase** of 2.40% comparing 2022 with 2017. The **West Region's** production **declined** 7.05% between 2017 and 2022. This region accounted for the smallest production share with 17.65% of the 2022 U.S. total.

Data Source: USDA, NASS; Dairy Products 2022 Summary, Feb 2023.

Total U.S. Ice Cream Production * By Region (thousand gallons)

	Atlantic	Central	West	Total
2017	163,715	429,482	137,965	731,162
2018	160,788	422,648	142,774	726,210
2019	159,399	425,087	124,908	709,394
2020	171,509	459,807	135,585	766,901
2021	167,131	428,879	126,778	722,788
2022	167,643	430,810	128,237	726,690

As a Percent of Total Production

	Atlantic	Central	West
2017	22.39	58.74	18.87
2018	22.14	58.20	19.66
2019	22.47	59.92	17.61
2020	22.36	59.96	17.68
2021	23.12	59.34	17.54
2022	23.07	59.28	17.65

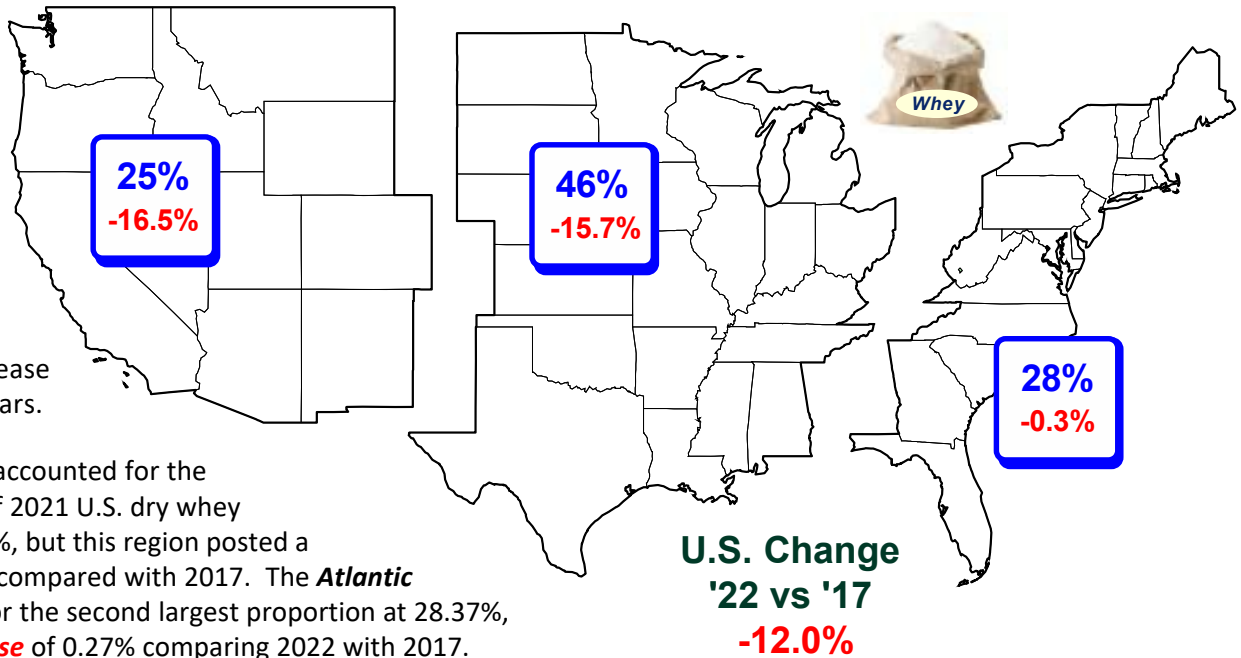


U.S. regular (hard) ice cream production increased by 0.54% in 2022, after decreasing in the previous year. The Central Region's share of the 2022 total was 59.28%, and this region has accounted for more than 50% of total U.S. ice cream production each year since 2006. After decreasing for 12 consecutive years, the Atlantic Region's proportion of total production has remained relatively constant since 2015. The West Region's production has been less than 20% of the U.S. total the last five years.

* Regular (hard) ice cream production.

Regional Whey Production as a Percentage of 2022 Total U.S. Whey Production with Percentage Change in Production: 2022 vs 2017

U.S. dry whey production* **decreased** by 12.04% comparing 2022's total with the 1.007 billion pounds produced in 2017. Dry whey production totaled 885.9 million pounds during 2022, **down** 2.81% from 2021. The 2022 **decrease** was the tenth year-over-year decrease in the last twelve years.



The **Central Region** accounted for the largest proportion of 2021 U.S. dry whey production at 46.33%, but this region posted a **decrease** of 15.67% compared with 2017. The **Atlantic Region** accounted for the second largest proportion at 28.37%, and posted a **decrease** of 0.27% comparing 2022 with 2017. The **West Region** posted the largest percentage **decrease** (-16.49%) comparing 2022 with 2017. This region accounted for 25.30% of 2022 U.S. dry whey production, the smallest proportion among the three regions.

Data Source: USDA, NASS; Dairy Products 2022 Summary, Feb 2023.

Total U.S. Dry Whey Production *

By Region (thousand lbs.)

	Atlantic	Central	West	Total
2017	251,993	486,768	268,385	1,007,146
2018	257,423	448,554	275,687	981,664
2019	257,040	425,930	278,822	961,792
2020	265,409	432,675	242,158	940,242
2021	279,129	438,099	194,274	911,502
2022	251,325	410,487	224,117	885,929

U.S. dry whey (human) production decreased by 2.81% during 2022, and has decreased in ten of the last twelve years. Production increased by 15.36% in the West Region during 2022, while the Central (-6.30%) and the Atlantic (-9.96%) Regions posted year-over-year losses. Comparing 2022 with 2017, total U.S. whey production was down 12.04%, with increases in only one region.

As a Percent of Total Production

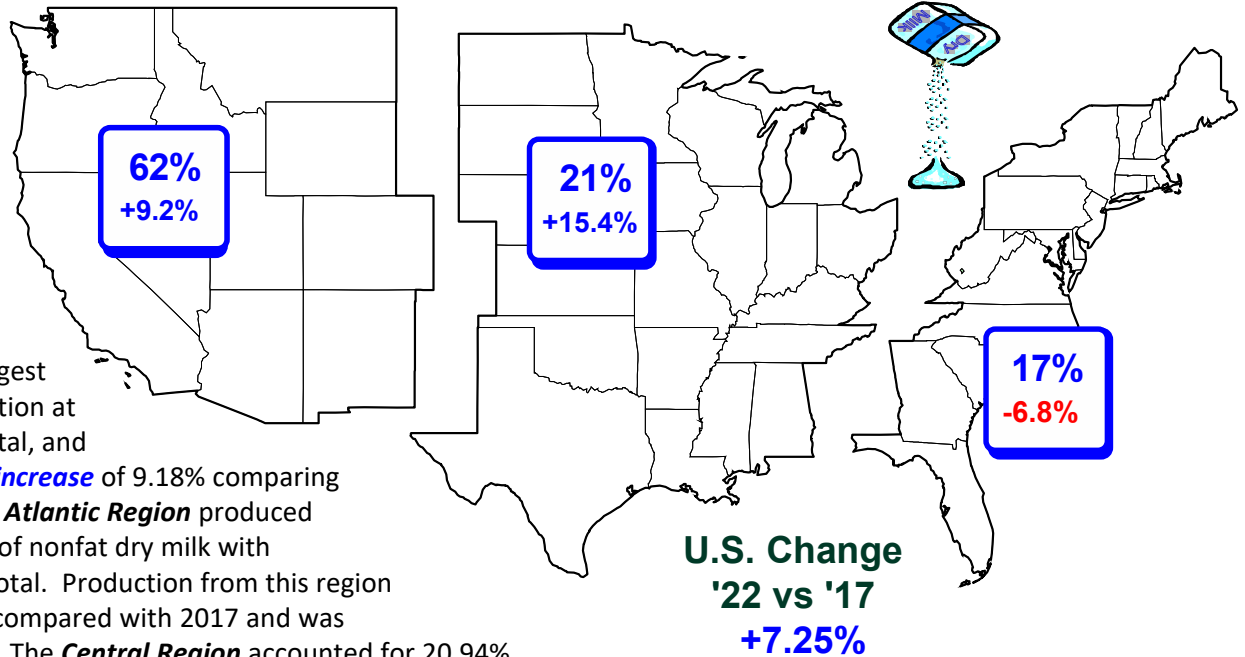
	Atlantic	Central	West
2017	25.02	48.33	26.65
2018	26.22	45.69	28.08
2019	26.73	44.28	28.99
2020	28.23	46.02	25.75
2021	30.62	48.06	21.32
2022	28.37	46.33	25.30



* Dry Whey (Human) Production.

Regional NFDM Production as a Percentage of 2022 Total U.S. NFDM Production with Percentage Change in Production: 2022 vs 2017

U.S. nonfat dry milk (NFDM) production **increased** by 7.25%, comparing 2022 with 2017. Production totaled 1.968 billion pounds in 2022, which was a **decrease** of 2.75% compared with 2021.



The **West Region** accounted for the largest proportion of production at 62.03% of the U.S. total, and posted a production **increase** of 9.18% comparing 2022 with 2017. The **Atlantic Region** produced the smallest amount of nonfat dry milk with 17.03% of the 2022 total. Production from this region **decreased** by 6.81% compared with 2017 and was **up** 0.71% from 2021. The **Central Region** accounted for 20.94% of the U.S. total in 2022, with production **increasing** by 15.36% compared with 2017, and **up** 2.97% versus the 2021 total.

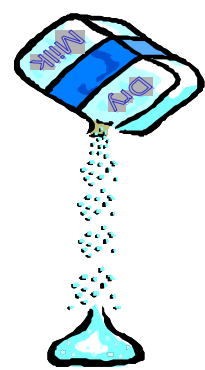
Data Source: USDA, NASS; Dairy Products 2022 Summary, Feb 2023.

Total U.S. Nonfat Dry Milk Production By Region (thousand lbs.)

	Atlantic	Central	West	Total
2017	359,715	357,246	1,118,316	1,835,277
2018	361,793	332,169	1,083,541	1,777,503
2019	360,658	365,089	1,125,363	1,851,110
2020	348,157	439,820	1,163,912	1,951,889
2021	332,860	400,244	1,290,923	2,024,027
2022	335,225	412,114	1,221,025	1,968,364

As a Percent of Total Production

	Atlantic	Central	West
2017	19.60	19.47	60.93
2018	20.35	18.69	60.96
2019	19.48	19.72	60.80
2020	17.84	22.53	59.63
2021	16.45	19.77	63.78
2022	17.03	20.94	62.03



The West has accounted for the largest proportion of total U.S. nonfat dry milk production for many years, although its share declined in eight of ten years prior to 2022. The West Region's share decreased to 62.03% in 2022 which was a 1.75 percentage point drop from last year. The Atlantic Region's production of nonfat dry milk increased by 32.77% compared with 2012, while the Central's has decreased by 10.14% when comparing with 2012.



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**Total U.S. Milk Production
By Region**

	----- Million Lbs. -----				----- % of Total -----		
	<u>Atlantic</u>	<u>Central</u>	<u>West</u>	<u>Total</u>	<u>Atlantic</u>	<u>Central</u>	<u>West</u>
2017	38,665	92,545	84,317	215,527	17.94	42.94	39.12
2018	37,927	93,500	86,141	217,568	17.43	42.98	39.59
2019	37,237	94,361	86,838	218,436	17.05	43.20	39.75
2020	37,458	97,131	88,676	223,309	16.77	43.50	39.71
2021	37,266	100,195	88,797	226,258	16.47	44.28	39.25
2022	37,074	101,433	87,950	226,462	16.37	44.79	38.84

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**Producer Price
Differential**

**Class I
Utilization**

	<u>July '23</u>		<u>June '23</u>		<u>July '23</u>		<u>June '23</u>	
	<u>July '23</u>	<u>June '23</u>	<u>July '23</u>	<u>June '23</u>	<u>July '23</u>	<u>June '23</u>	<u>June '23</u>	
Northeast	18.23	18.61	4.46	3.70	26.50	27.09		
Appalachian	19.85	20.31	---	---	66.94	66.72		
Florida	21.91	22.52	---	---	80.98	82.43		
Southeast	20.52	20.96	---	---	71.89	70.74		
Upper Midwest	14.18	15.27	0.41	0.36	5.28	5.44		
Central	15.88	16.64	2.11	1.73	25.35	26.55		
Mideast	16.24	17.08	2.47	2.17	35.30	36.37		
California	15.53	16.42	1.76	1.51	17.32	18.32		
Pacific Northwest	16.19	16.82	2.42	1.91	19.78	20.48		
Southwest	16.33	17.25	2.56	2.34	25.51	26.67		
Arizona	17.48	17.93	---	---	27.42	24.34		