

ORGANIC DAIRY MARKET NEWS

Information gathered July 13 - 25, 2025

ORGANIC DAIRY MARKET OVERVIEW

The Transition to Organic Partnership Program (TOPP) was formed through cooperative agreements between the USDA and non-profit organizations to provide technical assistance and support for transitioning and existing organic farmers. A calendar of events held by partner organizations can be found at the following link:

<https://www.organictransition.org/events/>

A selection of upcoming events is included below:

RTC's Unlocking Conservation Resources Series:

Milaca, MN - Jul 29

Mora, MN - Jul 31

Owatonna, MN - Aug 5

Jordan, MN - Aug 6

Fairmont, MN - Aug 7

OAK's Conservation on an Urban Farm, Louisville, KY - Jul 29

Rodale's Regenerative Organic Farm Tour, LaGrange, GA - Aug 1

OCIA's Transition to Organic Farm Tour, Robinson, KS - Aug 2

OSU's Organic Grains & Pulses Field Day, Corvallis, OR - Aug 5

NOFA-NH's Two Mountain Farm Field Day, Andover, NH - Aug 7

The National Organic Standards Board (NOSB) is seeking nominations to fill five vacant spots, with terms beginning in January 2026. Board members represent specific sectors of the organic community and serve a 5-year term. Applications are due by September 9, 2025, and can be submitted electronically or by mail postmarked by the due date.

More information about the current board openings, duties of board members, or application visit the following link:

<https://www.ams.usda.gov/rules-regulations/organic/nosb/nomination-process>

The USDA AMS National Organic Program (NOP) provides an email notification service to send out updates to the organic community. The Organic Insider sent out on July 11 discussed the USDA's search for nominees for the National Organic Standards Board (NOSB). This newsletter provides a summary of the NOSB, provides information on how to apply, and includes additional information regarding the NOSB.

To read more from the Organic Insider, view archives, or register to receive updates by email visit:

<https://www.ams.usda.gov/reports/organic-insider>

The UK-based Agriculture and Horticulture Development Board (AHDB) recently released a report reviewing dairy markets in the country for Q2 2025. The report stated Great Britain organic milk production continued to grow and milk deliveries were up 12.6 percent in Q2 2025 from a year ago. The report also noted organic milk availability is declining in Europe, which could provide further opportunities for producers in the UK.

ORGANIC DAIRY FLUID OVERVIEW

The Agricultural Marketing Service (AMS) reported May 2025 estimated fluid product sales. The U.S. sale of total organic packaged fluid milk products was 252 million pounds, down 4.0 percent from the previous year. From the start of the year through May, the U.S. sale of total organic packaged fluid milk products was 1,278 million pounds, up 1.1 percent year-to-date. Organic whole milk sales, 140 million pounds, rose 0.9 percent compared to a year earlier and increased 5.9 percent year-to-date. Reduced fat milk (2%) sales were 78 million pounds, down 6.2 percent from the previous year but up 2.1 percent year-to-date. Fat free milk (skim) sales, 11 million pounds, increased 4.4 percent from the previous year, but declined 7.2 percent year-to-date.

**Estimated Total U.S. Sales Of Organic Fluid Milk Products
May 2025, with comparison**

Product Name	Sales ¹ May	Sales ¹ Y-T-D	%Change Prev Yr.	%Change Y-T-D
Whole Milk	140	700	0.9	5.9
Flavored Whole Milk	1	3	3.5	- 25.1
Reduced Fat Milk (2%)	78	408	- 6.2	2.1
Low Fat Milk (1%)	17	87	- 20.3	- 18.6
Fat-Free Milk (Skim)	11	42	4.4	- 7.2
Flavored Fat-Reduced Milk	5	25	- 35.2	- 25.7
Other Fluid Milk Products	0	2	- 46.1	- 9.2
Total Fat-Reduced Milk	111	572	- 9.4	- 4.0
Total Organic Milk Products	252	1,278	- 4.0	1.1

1. Sales in million pounds. Data may not add due to rounding

Federal Milk Market Order 1, in New England, reports utilization of types of organic milk by pool plants. During June 2025, organic whole milk utilization totaled 19.38 million pounds, up from 15.81 million pounds the previous year. The butterfat content, 3.29 percent, is up from 3.27 a year ago. The utilization of organic reduced fat milk, 15.69 million pounds, decreased from 15.71 million pounds a year ago. The butterfat content, 1.49 percent, increased from 1.40 percent the previous year.

The May 2025 European organic milk average pay price increased in Austria, France, Germany, and Bavaria compared to April. The average pay price in May 2025 was up from a year ago in Austria, France, Germany, and Bavaria.

**Organic Milk Pay Prices in Europe
May 2025**

Country	Euros/100KG	*(USD/100KG)	%Change Apr 2025	%Change May 2024
Austria (1)	60.59	\$67.85	+0.87	+12.47
Austria (2)	65.26	\$73.08	+0.84	+11.14
Germany	64.71	\$72.47	+0.65	+15.43
Bavaria	65.17	\$72.98	+0.70	+15.82
France	46.40	\$51.96	+1.93	+8.86

*Results are based on the exchange rate for May 15, 2024, exchange rate of 1 Euro/1.11989 \$USD.

Austria (1) prices exclude "haymilk," Austria (2) prices include "haymilk" which is produced by cows mainly fed grasses & dry hay, rather than silage.

In a recent report from a Pacific Northwest livestock auction, the top 10 organic cull cows traded lower than the top 10 conventional cull cows. Overall, average organic cull cows traded higher than conventional cull cows. The average price for the top 10 organic cows auctioned was \$156.83 per hundredweight, compared to an average price of \$170.69 per hundredweight for the top 10 conventional cows auctioned. The average weight for the top 10 conventional cows was 1,643.5 pounds compared to 1,531.0 pounds for the top 10 organic cows. The overall price for organic cows auctioned was \$130.91 per hundredweight with an average weight of 1,198.72 pounds, while the overall price for conventional cows auctioned was \$127.76 per hundredweight with an average weight of 1,189.01 pounds.

NATIONAL ORGANIC GRAIN AND FEEDSTUFFS

Compared to last period, trading was active for organic feed corn and for food and feed grade wheat. Trade activity was light for organic feed soybeans. Demand was good for organic corn, feed soybeans, and food wheat. Demand was moderate for organic feed wheat. Organic corn sold 16 cents lower delivered at the elevator with the bulk of market activity on forward contracts set to deliver Q3 2025 through Q3 2026.

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Organic feed soybeans sold 23 cents higher delivered elevator with forward contracts set to deliver Q4 2025 through Q3 2026. Organic feed wheat sold 14 cents higher delivered at the elevator with feed grade forward contracts delivering Q3 2025 and food grade delivering Q3 2025 through Q2 2026. There were no comparable trades for all other organic grains. The next report will be published Wednesday, August 6, 2025.

Grower FOB Farm Gate Organic Grain				
Spot Transactions				
Feed Grade	Price Range	Avg.	Change	Prior Year
Yellow Corn	7.35 - 8.75	8.06	-0.21	6.49
Soybeans	21.50 - 23.00	22.57	1.13	19.43

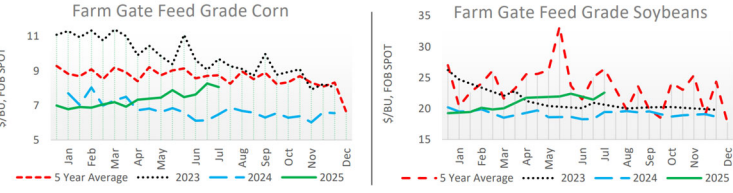
Forward Contracts			Cash Bids	
Feed Grade	Price Range	Delivery Period	Feed Grade	Price Range
Yellow Corn	7.25 - 8.35	Jul-25 - May-26	Yellow Corn	7.35 - 7.35
Soybeans	21.75 - 22.25	Jul-25 - Dec-25	Soybeans	N/A - N/A
Wheat	7.89 - 8.30	Jul-25 - Sep-25	Wheat	N/A - N/A

*All prices in \$/bu

Grower Delivered Elevator/Warehouse Organic Grain				
Spot Transactions				
Feed Grade	Price Range	Avg.	Change	Prior Year
Yellow Corn	7.65 - 10.00	8.93	-0.16	6.98
Soybeans	21.00 - 24.00	22.98	0.23	20.59
Wheat	6.50 - 8.75	7.34	0.14	5.92

Forward Contracts			Cash Bids	
Feed Grade	Price Range	Delivery Period	Feed Grade	Price Range
Yellow Corn	6.75 - 11.25	Jul-25 - Sep-26	Yellow Corn	6.75 - 9.00
Soybeans	21.00 - 23.00	Oct-25 - Jun-26	Soybeans	21.00 - 23.50
Wheat	6.75 - 9.00	Jul-25 - Sep-25	Wheat	6.50 - 8.75

*All prices in \$/bu



ORGANIC DAIRY RETAIL OVERVIEW

Total organic dairy ads declined in 41 percent in last week's retail ad survey and fell another 21 percent in the week 30 survey. The only organic commodities that are present in more ads this week are butter and yogurt. Ads for organic sour cream were unchanged from last week, but total ads declined for every other organic commodity featured in the week 29 and week 30 surveys.

Organic yogurt overtook milk as the most advertised organic dairy commodity this week, as total ads for this commodity are up 48 percent from the prior survey. Organic Greek yogurt in 4-6-ounce containers was present in surveyed ads last week but was absent from this week's survey. Ads for 32-ounce containers of organic regular yogurt, the only advertised organic yogurt product in week 30, are up 116 percent. The weighted average advertised price (average price) for this product is down 67 cents to \$4.94. Conventional 32-ounce regular yogurt has an average price of \$3.53, making an organic premium of \$1.41.

Organic milk ads are down 55 percent, as total ads declined for half gallons and gallons of organic milk. Half gallon containers are the most advertised organic milk product, though total ads for this product are down 55 percent. The week 30 organic milk in half gallons average price is up 46 cents to \$6.49. This item's conventional counterpart has an average price of \$2.26, leading to an organic premium of \$4.23.

Total ads for the third most advertised organic dairy commodity, ice cream, are down 2 percent. The only organic ice cream product present in surveyed retail ads for week 29 and week 30 was sold in 14-16-ounce containers. The average price for 14-16-ounce organic ice cream is up 34 cents to \$7.19. Conventional 14-16-ounce ice cream's average price is \$3.76, making the organic premium for this product \$3.43.

Cheese, the fourth most advertised organic dairy commodity, is present in 32 percent fewer retail ads this week. Organic 6-8-ounce sliced cheese is the most advertised organic cheese product this week, though total ads declined 45 percent. The average price for this product is \$5.86, up 48 cents. Conventional 6-8-ounce sliced cheese has an average price of \$2.25, creating an organic premium of \$3.61.

NATIONAL RETAIL ORGANIC DAIRY WEIGHTED AVERAGE ADVERTISED PRICES			
COMMODITY	This Week	Last Week	Last Year
Butter - 1 lb.	\$9.79	n.a.	n.a.
Cheese - 6-8 oz. Block	\$3.61	n.a.	\$7.99
Cheese - 6-8 oz. Shred	\$4.49	\$4.49	\$5.99
Cheese - 6-8 oz. Sliced	\$5.86	\$5.38	\$6.19
Cottage Cheese - 16 oz.	n.a.	n.a.	\$4.68
Cream Cheese - 8 oz.	n.a.	n.a.	\$4.21
Ice Cream - 14-16 oz.	\$7.19	\$6.85	\$5.99
Ice Cream - 48-64 oz.	n.a.	n.a.	\$7.99
Milk - Half Gal	\$6.49	\$6.03	\$4.48
Milk - Gallon	\$8.74	\$7.91	\$6.98
Sour Cream - 16 oz.	\$3.99	\$3.79	\$4.50
Yogurt - 4-6 oz. Greek	n.a.	\$2.21	n.a.
Yogurt - 4-6 oz. Yogurt	n.a.	n.a.	\$1.61
Yogurt - 32 oz. Greek	n.a.	n.a.	\$4.65
Yogurt - 32 oz. Yogurt	\$4.94	\$5.61	\$4.99

