

ORGANIC DAIRY MARKET NEWS

Information gathered December 15 - 26, 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:

- Rodale's Organic Markets Workshop, Sandusky, OH - Jan 7-8
- OEFFA's Organic Inspector Training, Virtual - Jan 7
- MDA's Organic Conference, St Cloud, MN - Jan 8-9
- PFI's Annual Conference, Des Moines, IA - Jan 9-10
- NOFA-NY's 2026 Winter Conference, Purchase, NY - Jan 9-10

The USDA AMS National Organic Program (NOP) provides an email notification service, the Organic Insider, to send out updates to the organic community. The NOP Organic Insider from December 23rd provided an update about the National Organic Standards Board (NOSB) Fall 2025 meeting, which is rescheduled to January 13-14, 2026. This meeting will take place virtually from 11:00 am - 5:00 pm Eastern Time and public comments must be submitted by 11:59 pm ET on December 30, 2025.

To read more from the Organic Insider, view archives, or register to receive updates by email visit:
<https://www.ams.gov/reports/organic-insider>

ORGANIC DAIRY FLUID OVERVIEW

Federal Milk Market Order 1, in the Northeast, reports utilization of types of organic milk by regulated plants. In November 2025, organic whole milk utilization totaled 21.31 million pounds, up from 16.39 million pounds the previous year. The butterfat content, 3.29 percent, is down from a year ago. The utilization of organic reduced fat milk, 15.63 million pounds, up from 14.09 million pounds a year ago. The butterfat content, 1.51 percent, is up from 1.44 percent last year.

The Agricultural Marketing Service (AMS) reported October 2025 estimated fluid product sales. The U.S. sale of total organic milk products was 248 million pounds, down 3.2 percent from the previous year. From the start of the year through October, total U.S. organic sales was 2,486 million pounds, down 1.4 percent compared to the same period last year. Organic whole milk sales, 131 million pounds, decreased 4.0 percent compared to a year earlier and increased 2.6 percent year-to-date. Reduced fat milk (2%) sales were 83 million pounds, up 1.8 percent from the previous year but down 0.3 percent year-to-date. Fat free milk (skim) sales, 10 million pounds, decreased 1.3 percent from the previous year and declined 9.4 percent year-to-date.

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

Product Name	Sales ¹ Oct	Sales ¹ Y-T-D	% Change	
			Prev Yr.	Y-T-D
Whole Milk	131	1,354	-	4.0
Flavored Whole Milk	2	8	71.6	-
Reduced Fat Milk (2%)	83	803	1.8	-
Low Fat Milk (1%)	15	168	-	24.9
Fat-Free Milk (Skim)	10	100	-	1.3
Flavored Fat-Reduced Milk	5	49	0.2	-
Other Fluid Milk Products	1	4	-	0.8
Total Fat-Reduced Milk	113	1,120	-	3.1
Total Organic Milk Products	248	2,486	-	3.2

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

European organic milk average pay prices for October 2025 increased in Austria, France, Germany, and Bavaria compared to September 2025, and also increased from October 2024.

Organic Milk Pay Prices in Europe
October 2025

Country	Euros/100KG	*(USD/100KG)	%Change Sep 2025	%Change Oct 2024
Austria (1)	63.34	\$73.35	+0.35	+11.79
Austria (2)	69.00	\$79.91	+0.13	+10.21
Germany	67.00	\$77.59	+0.24	+12.17
Bavaria	67.06	\$77.66	+0.09	+12.61
France	52.24	\$60.50	+0.48	+3.16

*Results are based on the exchange rate for October 15, 2024, exchange rate of 1 Euro/1.15809 \$USD.

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

A large Dutch organic milk processor announced the guaranteed price for organic farm milk in January 2026 is 68.00 EUR/100kg (\$80.13 USD), down 0.71 Euros from December 2025. The processor stated this price adjustment is due to lower prices from reference companies. The guaranteed organic price applies to 100kg of milk with standard component levels: 3.58 percent protein, 4.45 percent fat, and 4.53 percent lactose. The amounts apply to an average supply of 550,000 kg of milk annually.

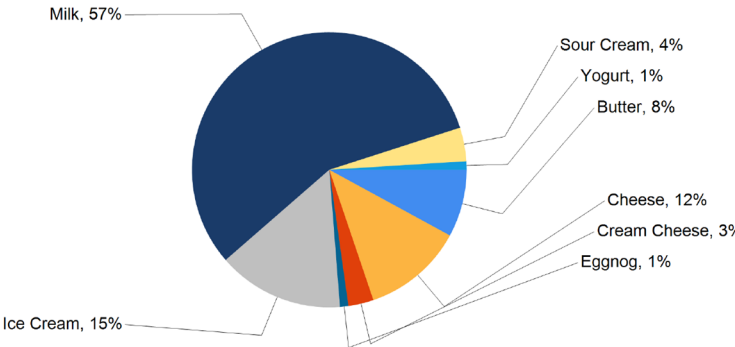
In a recent report from a Pacific Northwest livestock auction, the top 10 organic cull cows traded lower than the top 10 conventional cull cows. However, the overall average for organic cull cows was higher than for conventional cull cows. The average price for the top 10 organic cows auctioned was \$138.11 per hundredweight, compared to an average price of \$155.77 per hundredweight for the top 10 conventional cows auctioned. The average weight for the top 10 conventional cows was 1,796.0 pounds compared to 1,229.5 pounds for the top 10 organic cows.

The overall price for organic cows auctioned was \$122.97 per hundredweight with an average weight of 1,118.6 pounds, while the overall price for conventional cows auctioned was \$114.36 per hundredweight with an average weight of 1,238.2 pounds.

ORGANIC DAIRY RETAIL OVERVIEW

In the week 52 retail survey, total organic dairy ads grew 1 percent. Ads for the most advertised organic commodity, milk, increased 11 percent. Ice cream was the fifth most advertised organic commodity in week 51, but a 120 percent increase in ads made this commodity the second most advertised this week. Organic eggnog ads are down 87 percent in this week's survey.

Percentage of Total Organic Ads by Commodity



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Gallons of organic milk appeared in the week 51 retail survey, but are absent this week, making half gallons the only advertised package size of organic milk for week 52. Total ads for half gallon milk are up 20 percent, and the weighted average advertised price (average price) increased 33 cents to \$5.07. This product's conventional counterpart has an average price of \$1.72. The organic premium for half gallon milk is \$3.35.

Organic ice cream ads are up 120 percent, as ads increased for both 14-16-ounce and 48-64-ounce packages. This week's most advertised product, 14-16-ounce containers, appeared in 172 percent more ads. The average price for 14-16-ounce organic ice cream is \$7.18, down 37 cents. Conventional ice cream in the same packages size's average price is \$3.98, making the organic premium \$3.20.

Cheese remained the third most advertised organic commodity, while ads declined 4 percent. Ads for most organic cheese products declined, with ads only increasing for 6-8-ounce blocks. Packages of 6-8-ounce blocks appeared in 5 percent more ads this week. The average price for this product decreased 45 cents, to \$5.70. Conventional 6-8-ounce block cheese has an average price of \$2.52. The week 52 organic premium for this product is \$3.18.

The second most advertised organic commodity in week 51, butter, fell to fourth this week after appearing in 47 percent fewer ads. Organic 1-pound butter was not present in ads this week but appeared in the previous survey. Ads for 8-ounce organic butter are down 23 percent, and the average price is up 11 cents to \$4.81. The average price for conventional 8-ounce butter is \$2.92, leaving an organic premium of \$1.89.

NATIONAL RETAIL ORGANIC DAIRY
WEIGHTED AVERAGE ADVERTISED PRICES

COMMODITY	This Week	Last Week	Last Year
Butter - 8 oz.	\$4.81	\$4.70	n.a.
Butter - 1 lb.	n.a.	\$9.65	\$7.57
Cheese - 6-8 oz. Block	\$5.70	\$6.15	\$3.29
Cheese - 6-8 oz. Shred	\$3.51	\$3.73	\$4.04
Cheese - 6-8 oz. Sliced	\$3.75	\$3.73	\$5.70
Cream Cheese - 8 oz.	\$4.39	\$4.57	\$3.33
Egg nog - Quart	\$6.38	\$6.18	n.a.
Ice Cream - 14-16 oz.	\$7.18	\$7.55	n.a.
Ice Cream - 48-64 oz.	\$9.32	\$9.62	n.a.
Milk - Half Gal	\$5.07	\$4.74	\$4.95
Milk - Gallon	n.a.	\$8.18	\$8.19
Sour Cream - 16 oz.	\$4.71	\$4.99	\$4.58
Yogurt - 4-6 oz. Yogurt	\$1.29	n.a.	n.a.
Yogurt - 32 oz. Yogurt	\$4.79	\$3.99	\$4.37