



# Dutch Dairy in Figures 2025

# The Netherlands: land of dairy

The publication Dutch Dairy in Figures 2025 (Zuivel in Cijfers 2025) provides an overview in figures of the key developments in the Dutch dairy sector in 2025 and is divided into seven topics:

- The Netherlands: land of dairy
- Market and Economy
- Dairy farming
- Milk processing industry
- Sustainability
- Trade
- Consumption

ZuivelNL's mission is to strengthen the Dutch dairy chain while maintaining respect for mankind, animals, the environment and society as a whole. To facilitate discourse between dairy farmer interest groups and dairy companies in its capacity as a sector organisation, and to create added value through joint initiatives.

ZuivelNL's members are the Dutch Dairy Board (DDB), the Netherlands Agricultural and Horticultural Association (LTO), the Dutch Dairy Farmers' Union (NMV) and the Dutch Dairy Association (NZO).

For more information about ZuivelNL, visit [www.zuivelnl.org](http://www.zuivelnl.org).

Tables with detailed statistical information can be consulted on [ZuivelNL's website](http://ZuivelNL's website). Although the 2025 figures are provisional, they will not differ much from the final figures.

If the notation '-' is used, it means that the value is '0' (zero).  
If the notation '--' is used, it means that the value is unknown.

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## MODERN INDUSTRY

The Netherlands is known worldwide as a dairy country. The production and consumption of milk, butter and cheese have a long tradition and the characteristic meadow landscape with cows and windmills is inextricably linked to the image of our country. Behind this image lies a modern sector, with consideration for people, animals and the environment. It is one of the largest and most vital agricultural sectors in the Netherlands and contributes significantly to the Dutch economy.

The Dutch dairy sector is a frontrunner in the international dairy world. As a result, it has a strong image and good access to important (growth) markets. The following requirements are important in this regard:

- Distinctive product quality
- Food safety
- Animal health and animal welfare
- Sustainable development

The professionalism of dairy farmers, the dairy processing industry and supplying sectors is the decisive factor for the successful development of the Dutch dairy sector.

## THE NITROGEN POLICY AND THE PHASING OUT OF DEROGATION POSE A MAJOR CHALLENGE TO THE DAIRY SECTOR

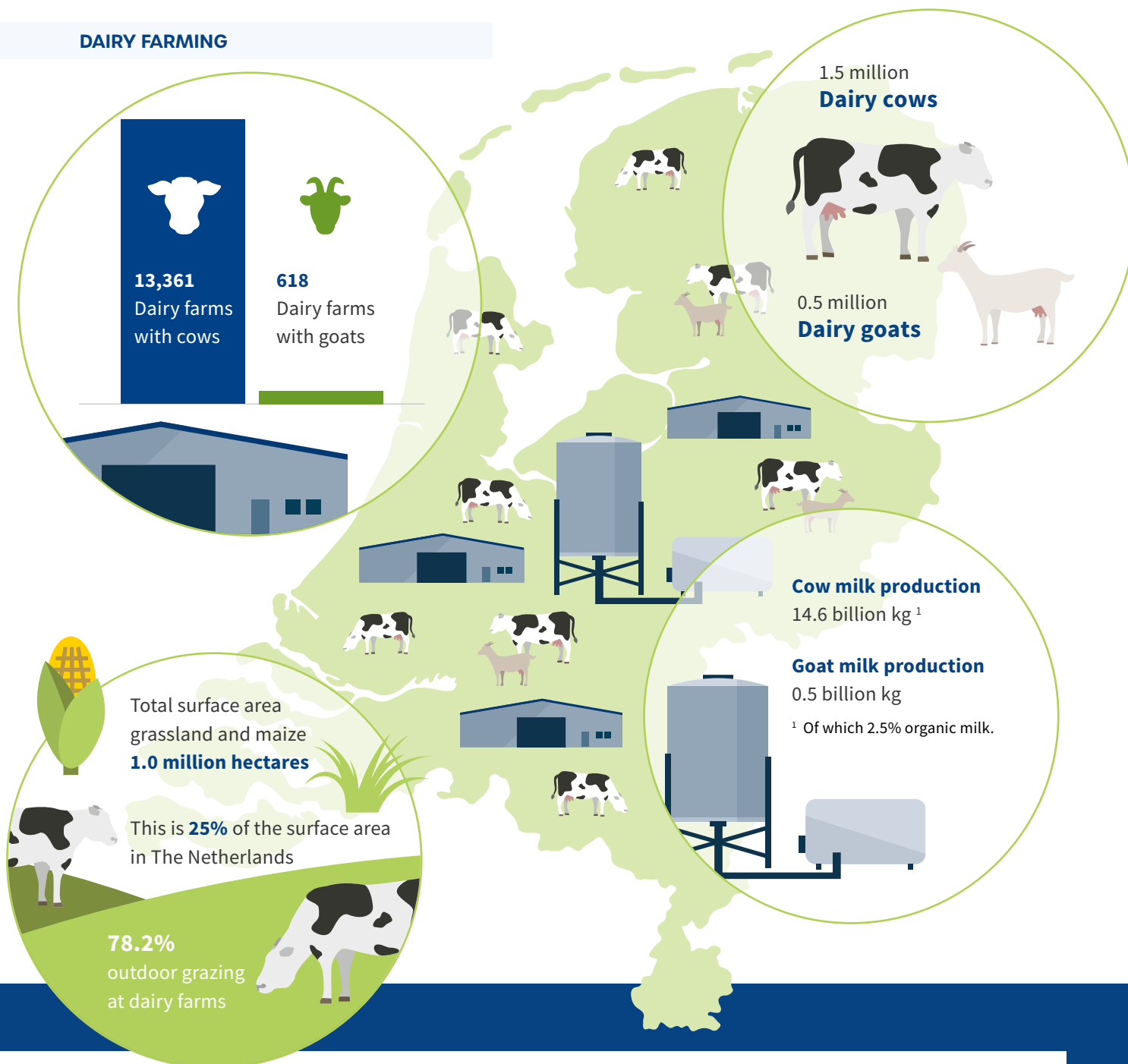
The government has imposed a heavy mandate on the agricultural sector to reduce nitrogen emissions. The entire Dutch dairy sector will face lasting consequences as a result.

In 2022, the European Commission's Nitrates Committee decided to phase out the more lenient regulations for manure spreading in the Netherlands. The phase-out started in 2023 and was implemented through annual reductions. This 'derogation' ended definitively on January 1, 2026.

Since then, Dutch dairy farmers are allowed to spread a maximum of 170 kg of nitrogen from animal manure per hectare per year (down from 230 to 250 kg). The costs of disposing of the surplus manure have risen sharply in recent years. As a result, the profitability of dairy farming is being negatively affected.

## FUTURE-ORIENTED THROUGH ECONOMICALLY AND ENVIRONMENTALLY RESPONSIBLE DEVELOPMENTS

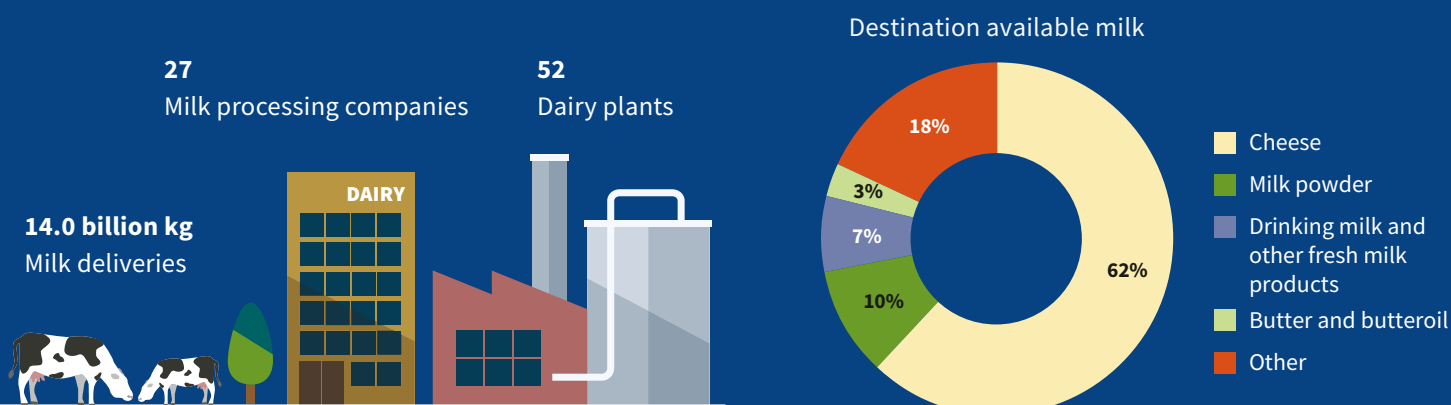
In the coming years, Dutch dairy farming will continue to focus on healthy and balanced development within environmental limits. Climate-related measures are also having an increasing impact on companies in the dairy industry, particularly with regard to greenhouse gas reduction and energy policy. Both the dairy industry and the dairy farmers are committed to making a positive contribution to achieving the national climate targets in an economically responsible manner.



EMPLOYMENT DAIRY FARMING AND MILK PROCESSING INDUSTRY

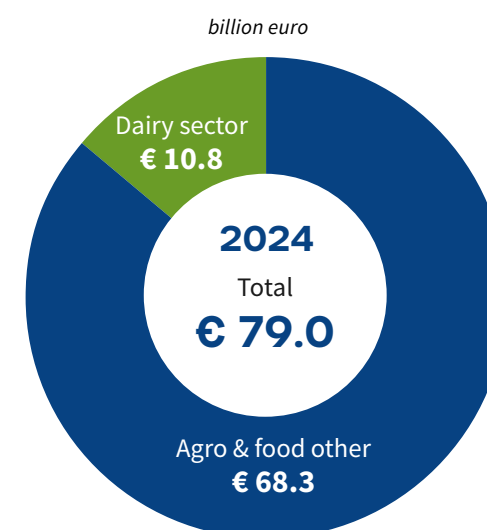


MILK DELIVERIES AND PROCESSING

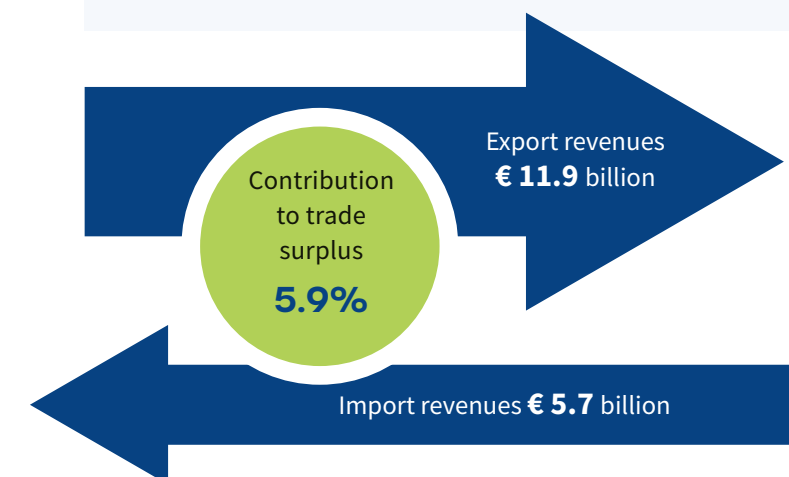


# Dutch dairy at a glance

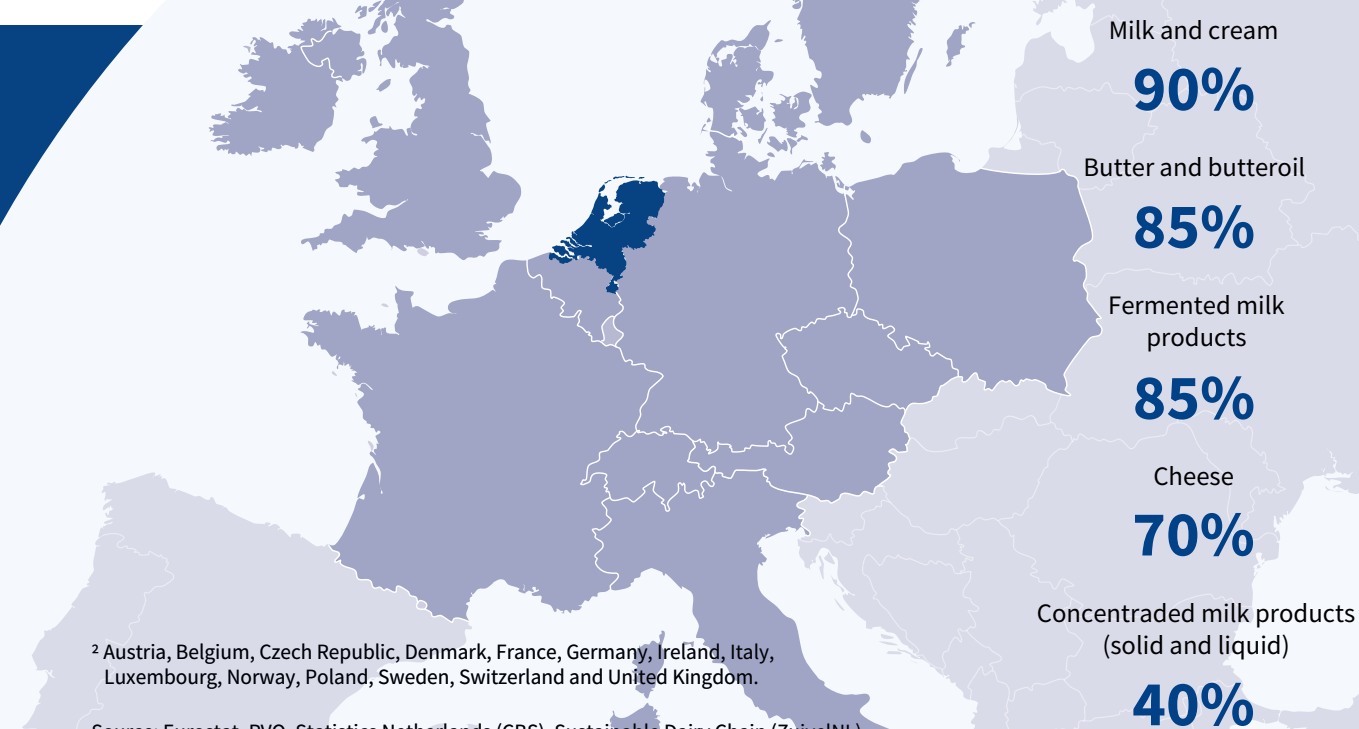
ECONOMIC IMPORTANCE



TRADE



REGIONAL SALES OUTSIDE THE NETHERLANDS <sup>2</sup>  
Share per product category



# Market and Economy

## SIGNIFICANT PRICE DROP DUE TO OVERSUPPLY

After a relatively calm first half of the year, characterised by a fairly normal seasonal pattern and only slightly weaker protein prices, the dairy market came under pressure in the second half of 2025 because of a sharp increase in supply. Prices for dairy products with a high fat content, in particular, declined significantly during this period.

Normal developments in supply and demand shaped the dairy market during the first half of 2025. The outbreak of foot-and-mouth disease (FMD) in Germany in mid-January and in Eastern Europe in March had only a limited impact on the market. On the butter market, the underlying market fundamentals changed little during this period. Supply remained tight, demand was moderate, and stocks were exceptionally low. As a result, even small changes in supply or demand led to downward or upward movements in prices. Following the sharp decline at the end of 2024, butter prices continued to fluctuate, remaining well above € 700 per 100 kg.

The price trend for skimmed milk powder differed from that of butter. From mid-December 2024 onwards, prices followed a gradual downward trend. This was partly due to the significant weakening of the US dollar compared with the beginning of 2025, driven by the unpredictable trade policy of the United States. In addition, demand on export markets remained disappointing. The decline in skimmed milk powder prices continued until early May 2025, after which prices remained stable for several months.

The situation on the dairy market changed significantly in the second half of 2025. Better-than-expected milk deliveries resulted in a sharp increase in supply. The acceleration in global milk production, driven by high milk prices, favourable weather conditions and the absence of the impact of bluetongue in Western Europe compared with the same period in 2024, led to a substantial decline in market prices from July onwards.

This was particularly evident for dairy products with a high fat content.

In the second half of August, the butter quotation fell below the € 700 per 100 kg mark and continued to decline rapidly during the remaining months of the year. The downward trend was especially pronounced in September. Strong milk deliveries and high milk component levels increased both butter availability and stocks. Cream prices also declined sharply.

At the same time, demand failed to keep pace with the strong growth in supply. Weaker buying interest put additional downward pressure on prices. By the end of December, the butter quotation stood at just above € 400 per 100 kg, more than 45% below its peak at the end of March. The skimmed milk powder market remained reasonably balanced until early September and was therefore considerably more predictable than the butter market. Supply and demand were well matched, and the quotation showed little movement during this period. Since then, the market has shifted somewhat, resulting in lower prices, although the decline was less pronounced than for butter.

European product faced strong competition on the global market from the United States, with the weaker dollar further strengthening the competitive position of US suppliers. By the end of 2025, the quotation had fallen to just below € 200 per 100 kg, almost 24% below the level of the highest quotation at the end of January.

The development of average price levels showed a mixed picture in 2025. Despite the sharp decline in the second half of the year, the average butter quotation remained reasonably stable. The decline was limited to 2%. The average quotation for skimmed milk powder decreased by more than 5%. In contrast, the average quotation for whole milk powder increased (+3%). The same applied to the average cheese price (Gouda), which showed a relatively strong increase (+9%). The average quotation for whey powder rose even more significantly (+20%).

## DUTCH MILK PRICE RISES BY ALMOST 9%

The development of milk prices paid in Europe and the Netherlands was in line with trends in the dairy market. Following the increase in the second half of 2024, the Dutch milk price remained at a similarly high level through September. From October onwards, the milk price declined sharply.

On average, the Dutch milk price level in 2025 was almost 9% higher than in the previous year (source: Milk Market Observatory). Despite the significant increase in manure disposal costs, the profitability of dairy farming improved further, as milk prices and livestock prices increased more strongly than production costs.

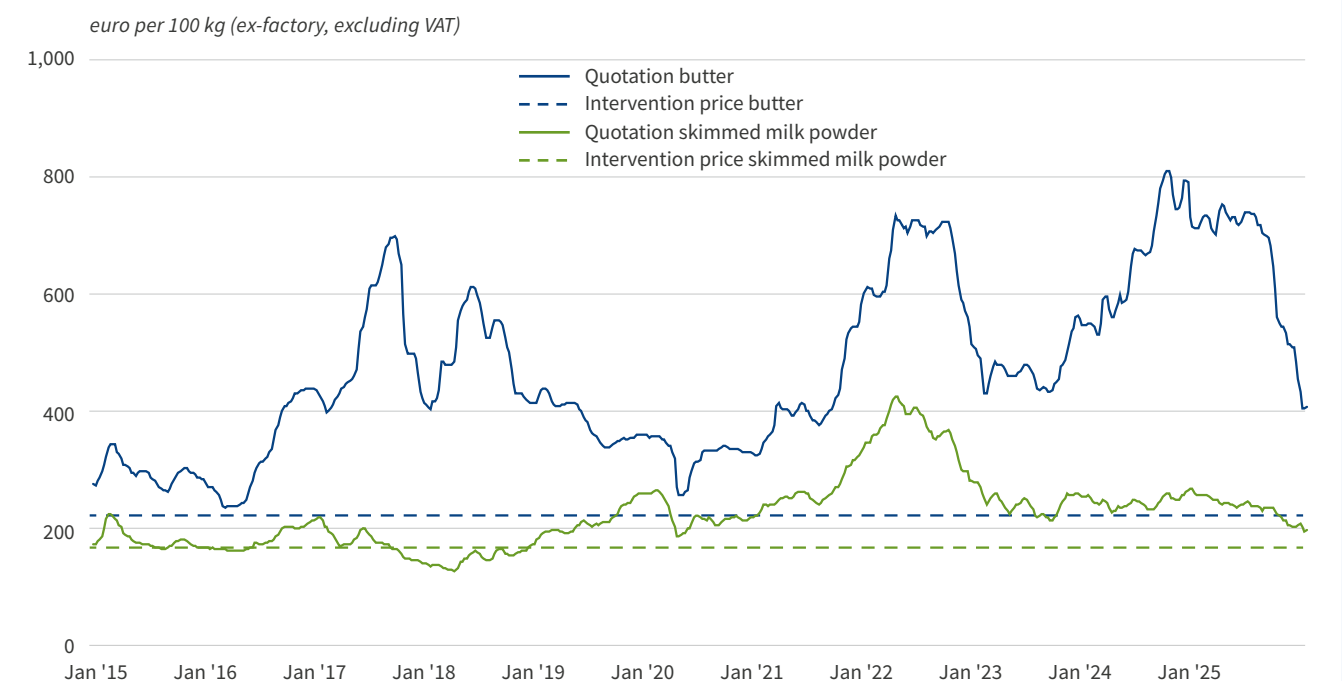
## DAIRY CONTRIBUTES 1% TO THE DUTCH ECONOMY

In 2024, the Agro & Food sector contributed € 79.0 billion (7.0%) to the Dutch economy (total: € 1,122.5 billion), of which € 10.8 billion (1.0%) was related to dairy.

The share of dairy <sup>1</sup> in Dutch household expenditure on food and non-alcoholic beverages has gradually increased in recent years to almost 12%. In 2024 dairy <sup>1</sup> represented a value of more than € 6.3 billion, accounting for 1.3% of total household consumption expenditure.

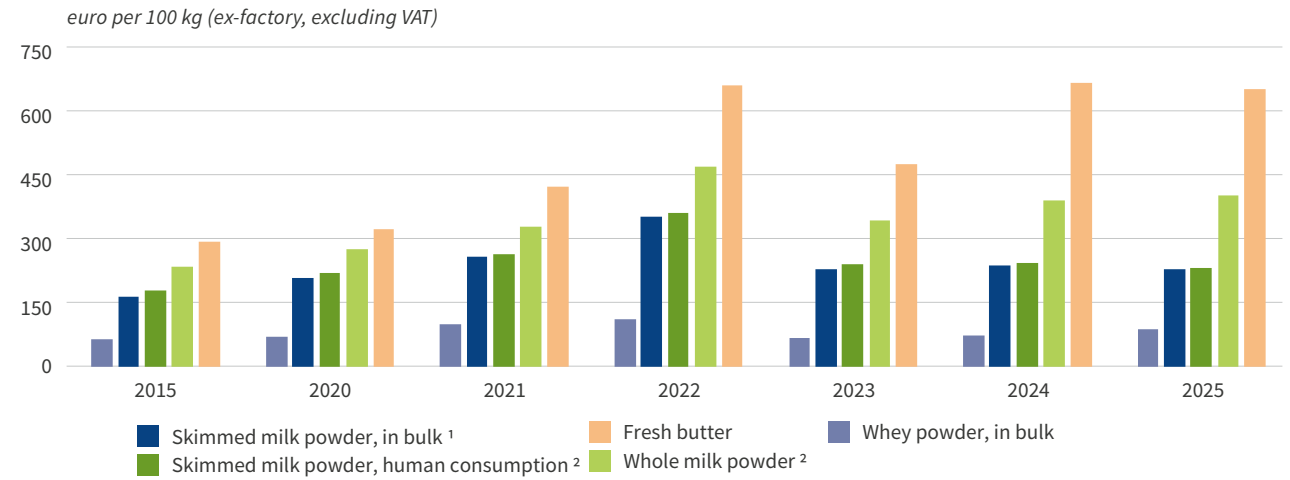
<sup>1</sup> Milk, cheese and eggs, excluding butter.

## DUTCH QUOTATION FOR BUTTER AND SKIMMED MILK POWDER



Source: ZuivelNL

ANNUAL AVERAGE DUTCH QUOTATIONS

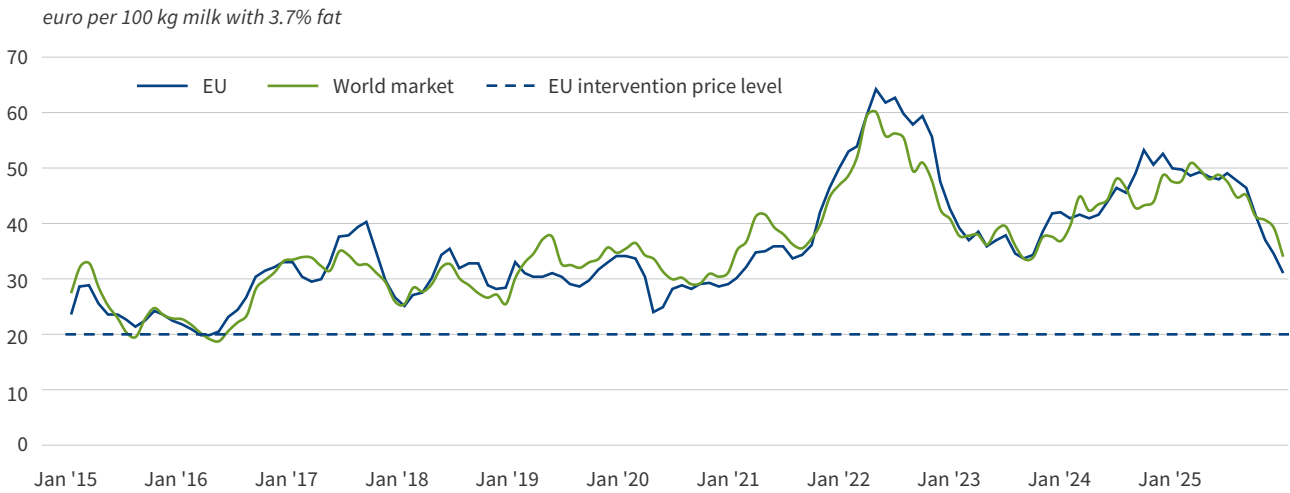


<sup>1</sup> Free of charge delivery.  
<sup>2</sup> According to usual merchantable quality (protein-standardized).

Source: ZuivelNL

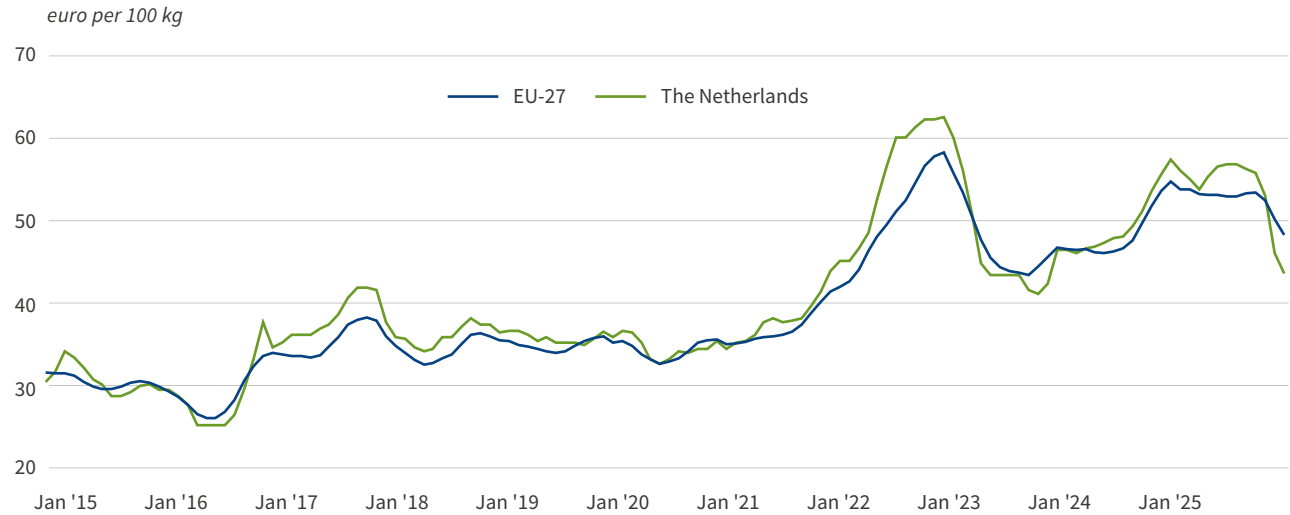
REVENUE OF MILK

Based on Dutch quotations, respectively global market prices for butter and skimmed milk powder



Source: ZuivelNL

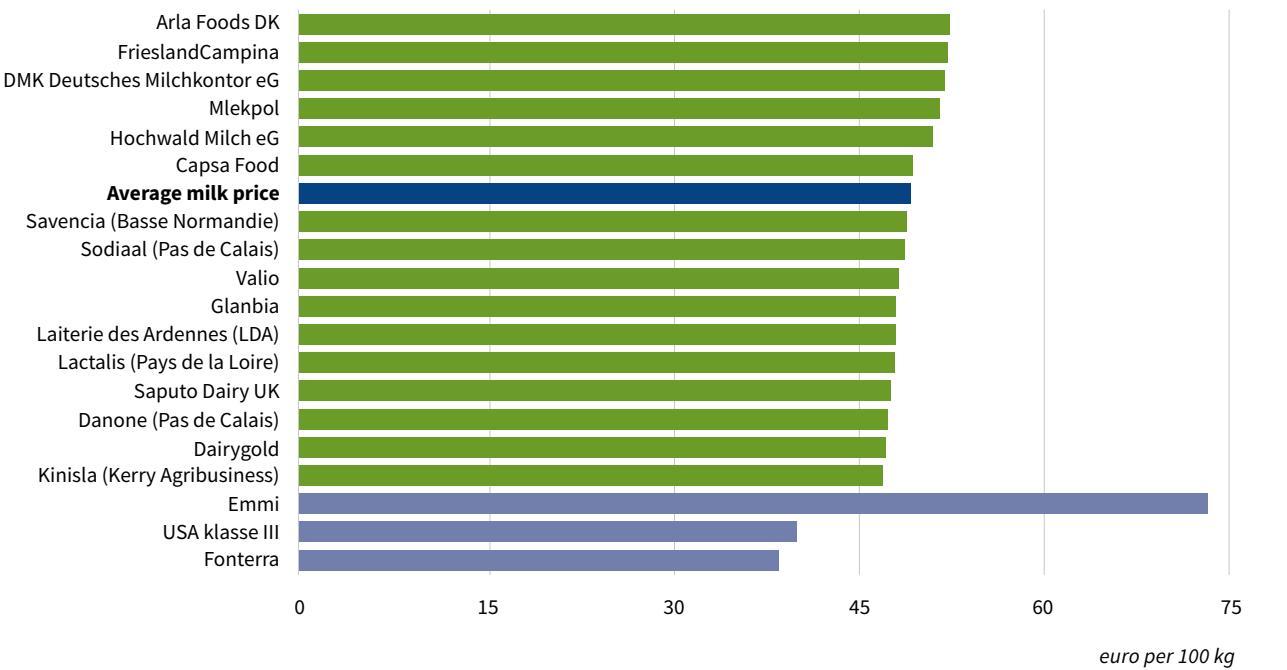
MONTHLY MILK PRICES PAID



Source: Milk Market Observatory

INTERNATIONAL MILK PRICE COMPARISON

12 month average over January-December 2025 (excluding supplementary payments) <sup>3</sup>

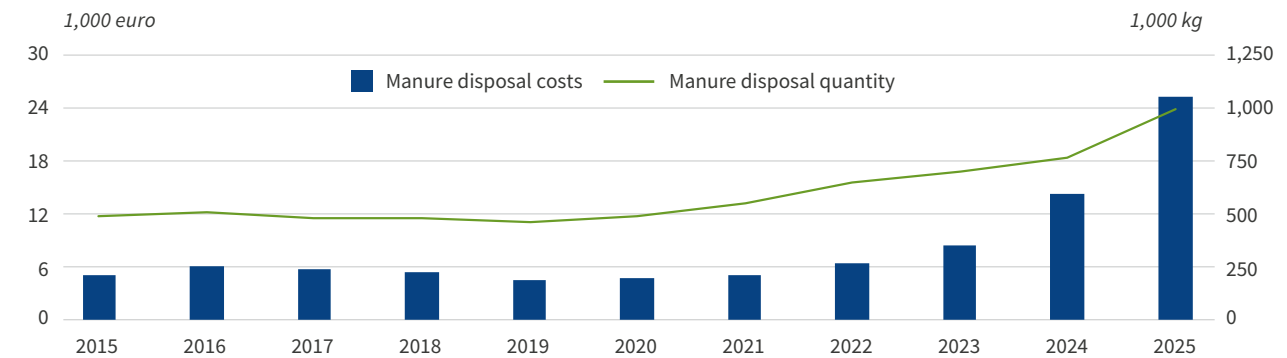


<sup>3</sup> Prices for standard milk with 4.2% fat and 3.4% protein for an annual supply of 1,000,000 kg of milk (excluding VAT, including additional payments and excluding surcharges for special milk flows).

Source: European Dairy Farmers, ZuivelNL

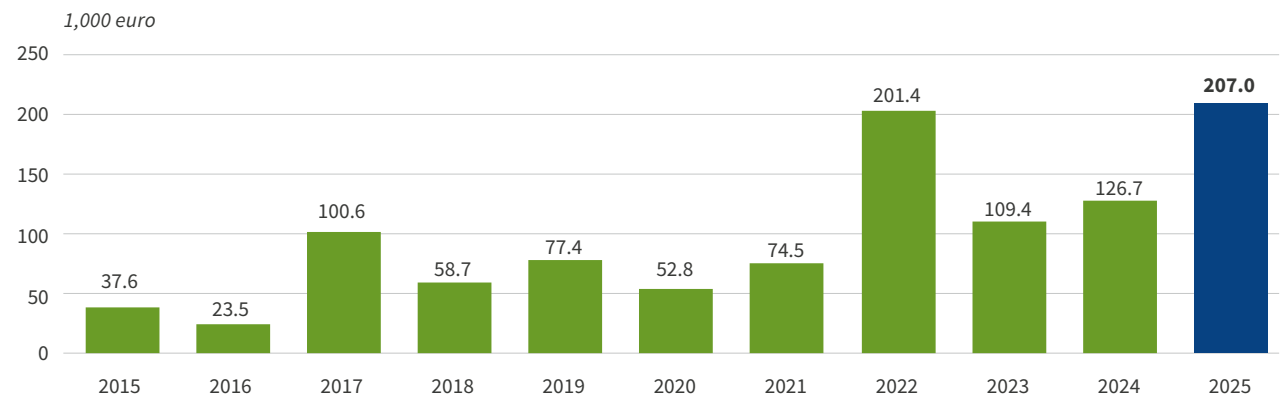
DAIRY FARM MANURE DISPOSAL

Costs (excl. VAT) and quantities



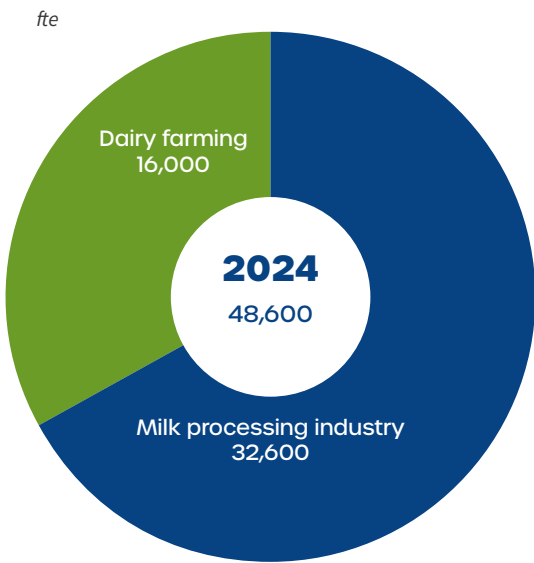
Source: Wageningen University & Research

DAIRY FARMS - INCOME DEVELOPMENT PER FARM

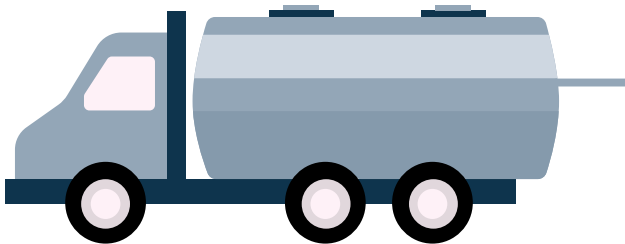


Source: Wageningen University & Research

EMPLOYMENT DAIRY FARMING AND MILK PROCESSING INDUSTRY NETHERLANDS



Source: Eurostat, Wageningen University & Research, ZuivelNL



GROSS INVESTMENT IN TANGIBLE NON-CURRENT ASSETS MILK PROCESSING INDUSTRY IN THE EU

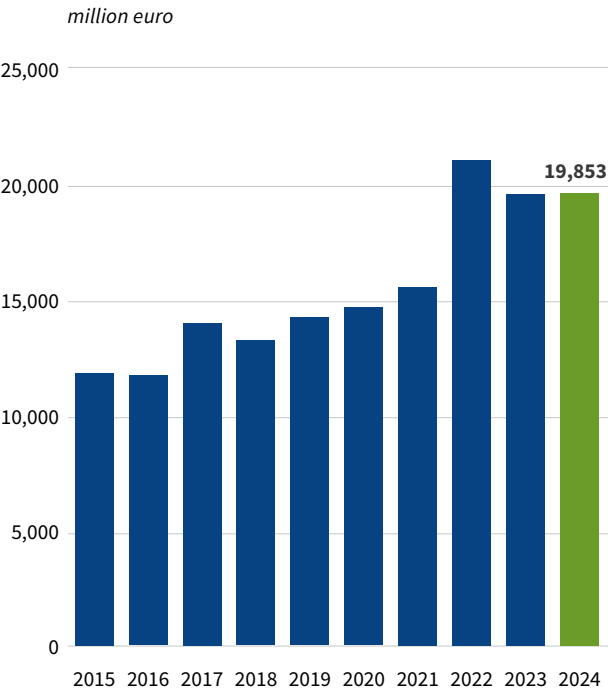
*million euro*

|              | 2021         | 2022           | 2023                      |
|--------------|--------------|----------------|---------------------------|
| France       | 1,475        | 1,389          | 1,392                     |
| Germany      | 822          | 1,152          | 957                       |
| Italy        | 463          | 662            | 570                       |
| Netherlands  | 282          | 389            | 502                       |
| Spain        | 365          | 316            | 388                       |
| Poland       | 218          | 216            | 212                       |
| Belgium      | 200          | 142            | 182                       |
| Greece       | 109          | 163            | 154                       |
| Romania      | 62           | - <sup>4</sup> | 143                       |
| Austria      | 166          | 203            | 128                       |
| Other EU     | 839          | 903            | 973                       |
| <b>EU-27</b> | <b>5,000</b> | <b>5,534</b>   | <b>5,600 <sup>5</sup></b> |

<sup>4</sup> Figure not available.  
<sup>5</sup> Estimate.

Source: Eurostat

NET TURNOVER MILK PROCESSING INDUSTRY THE NETHERLANDS <sup>6</sup>



<sup>6</sup> Including production of ice cream.

Source: Statistics Netherlands (CBS)

USD/EUR EXCHANGE RATE DEVELOPMENT



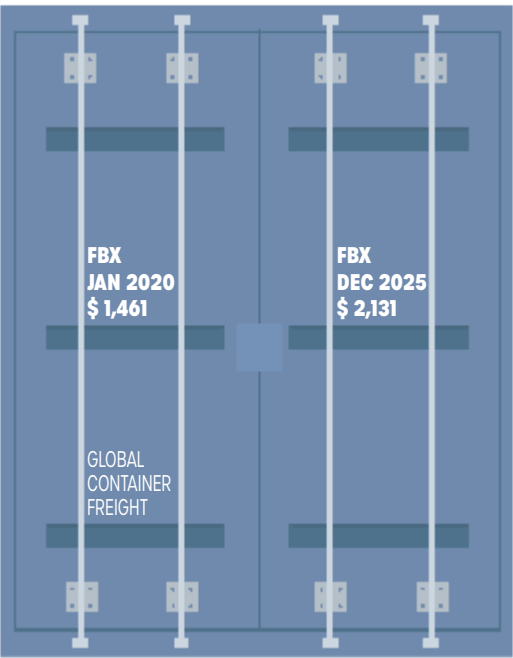
Source: DNB

PRICE DEVELOPMENT GLOBAL CONTAINER FREIGHT

Freightos Baltic Index (FBX): rates for 40ft sea containers



Source: Freightos data



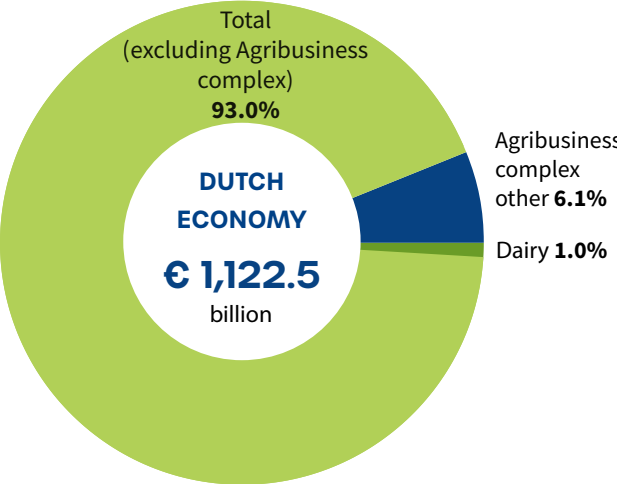
DAIRY EXPORT REVENUES 2025

*billion euro*

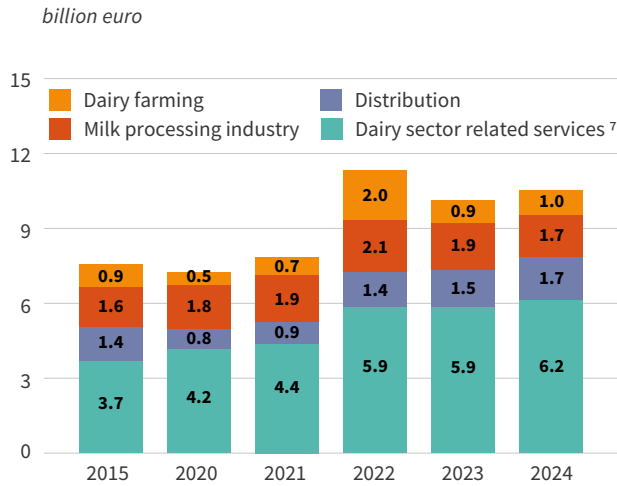
|                                             | Dutch origin | re-exports | Total       |
|---------------------------------------------|--------------|------------|-------------|
| Milk and cream                              | 1.1          | 0.3        | 1.4         |
| Concentrated milk products                  | 1.2          | 0.3        | 1.5         |
| Fermented milk products                     | 0.1          | 0.1        | 0.1         |
| Whey products and milk protein concentrates | 0.4          | 0.1        | 0.5         |
| Butter and butteroil                        | 1.3          | 0.7        | 2.0         |
| Cheese                                      | 4.3          | 1.3        | 5.6         |
| <b>Total</b>                                | <b>8.3</b>   | <b>2.8</b> | <b>11.1</b> |

Source: Statistics Netherlands (CBS)

CONTRIBUTION OF THE AGRIBUSINESS COMPLEX TO THE DUTCH ECONOMY 2024

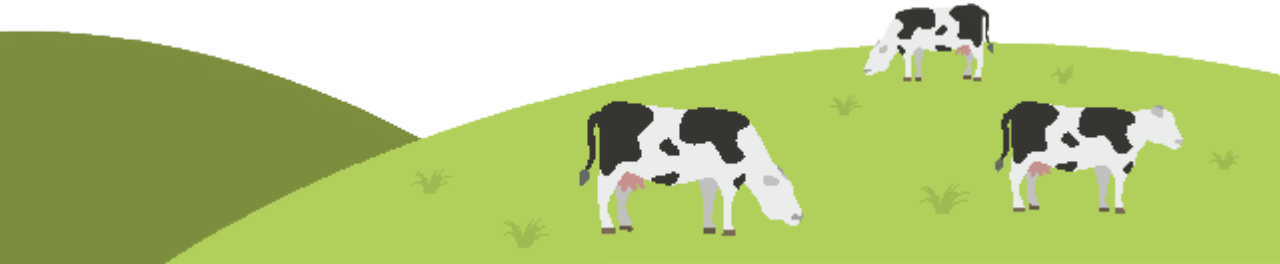


ADDED VALUE DUTCH DAIRY COMPLEX



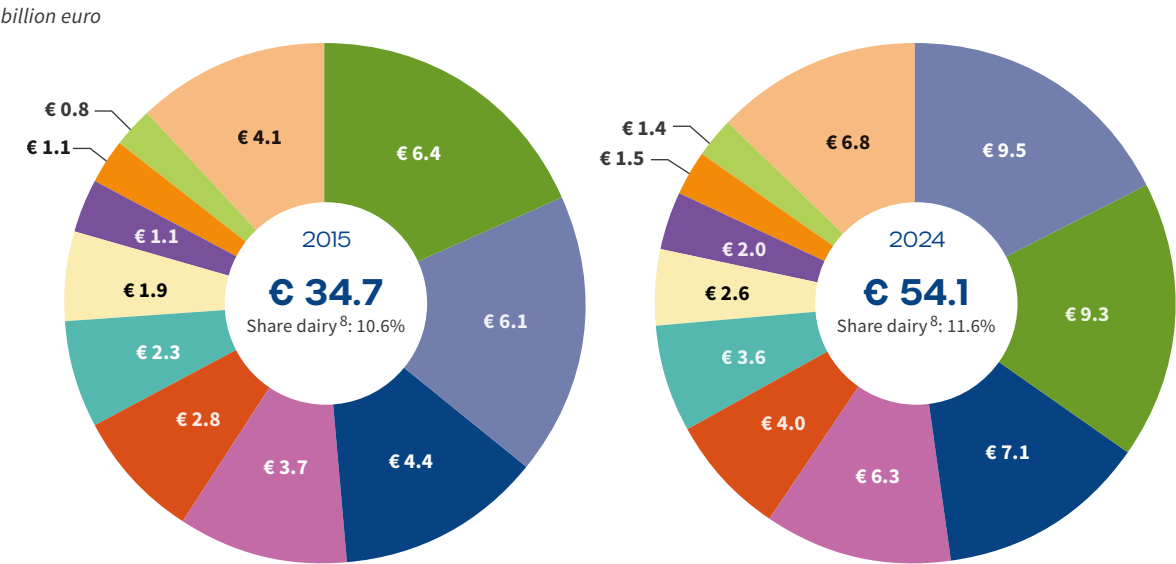
<sup>7</sup> Among other agricultural and financial services, utilities and employment agencies.

Source: Wageningen University & Research

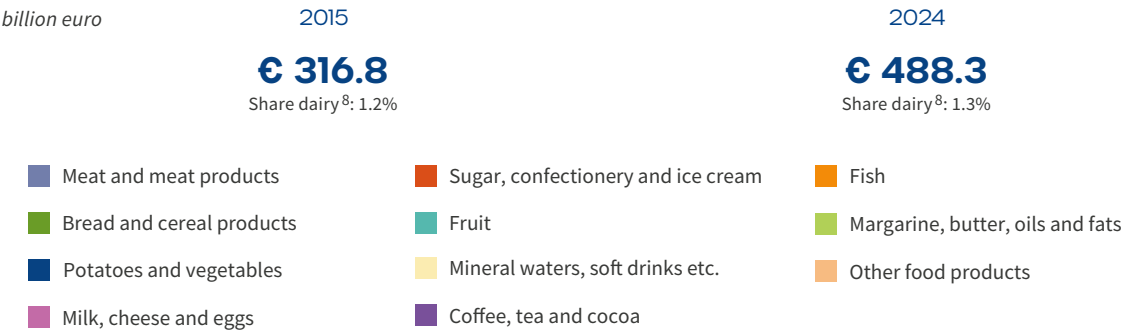


CONSUMPTION SPENDING OF DUTCH HOUSEHOLDS

Spending on food and non-alcoholic beverages



Total consumption spending



<sup>8</sup> Excluding butter.

Source: Statistics Netherlands (CBS)

GROSS PRODUCTION VALUE DUTCH AGRICULTURE

|                             | billon euro |      |      |      | % share |        |        |        |
|-----------------------------|-------------|------|------|------|---------|--------|--------|--------|
|                             | 2015        | 2020 | 2024 | 2025 | 2015    | 2020   | 2024   | 2025   |
| Horticulture                | 11.3        | 11.9 | 13.6 | 13.9 | 37.5%   | 37.6%  | 32.9%  | 33.1%  |
| Dairy farming               | 4.8         | 5.3  | 7.4  | 8.3  | 15.8%   | 16.8%  | 18.0%  | 19.7%  |
| Livestock, meat and eggs    | 6.0         | 6.1  | 7.6  | 7.5  | 19.9%   | 19.2%  | 18.4%  | 17.8%  |
| Arable farming              | 4.4         | 4.7  | 6.7  | 6.2  | 14.8%   | 14.7%  | 16.2%  | 14.7%  |
| Other agricultural products | 3.6         | 3.7  | 6.0  | 6.2  | 12.0%   | 11.8%  | 14.5%  | 14.7%  |
| Total                       | 30.1        | 31.7 | 41.3 | 42.1 | 100.0%  | 100.0% | 100.0% | 100.0% |

Source: Eurostat

DEVELOPMENT OF CONSUMER PRICES

Year-on-year change CPI (%)

|      | All expenditures | Food  | Cheese and cottage cheese | Butter | Semi-skimmed and skimmed milk, fresh | Yoghurt |
|------|------------------|-------|---------------------------|--------|--------------------------------------|---------|
| 2020 | 1.3%             | 2.0%  | 1.2%                      | 0.6%   | 1.7%                                 | 1.6%    |
| 2021 | 2.7%             | -0.2% | 0.0%                      | -0.4%  | 2.6%                                 | 1.4%    |
| 2022 | 10.0%            | 10.8% | 16.5%                     | 25.0%  | 16.2%                                | 15.4%   |
| 2023 | 3.8%             | 12.1% | 15.3%                     | 3.0%   | 6.8%                                 | 13.1%   |
| 2024 | 3.3%             | 1.1%  | -1.8%                     | 1.9%   | -8.2%                                | -0.3%   |
| 2025 | 3.3%             | 3.5%  | 3.5%                      | 11.2%  | 2.7%                                 | 4.8%    |

Source: Statistics Netherlands (CBS)

# Dairy farming

## SHARP INCREASE IN MILK PRODUCTION IN THE SECOND HALF OF 2025

Dutch milk production amounted to approximately 14.6 billion kg in 2025. Around 96% of this volume was delivered to the Dutch milk processing industry. The remaining 4% was used for on-farm dairy production and other purposes.

Dutch milk deliveries increased by 1.9% in 2025 to 14.0 billion kg. Adjusted for the leap year effect, the increase amounted to 2.2%. During the first half of the year, volumes were still declining. This downward trend had already started in September 2023. The prolonged period of decline came to an end in July, after which a clear acceleration in growth became visible from August onwards, continuing through the end of the year.

The growth that started in July was driven by favourable weather conditions, good-quality forage, high milk prices and the absence of the effects of bluetongue compared with the same period in 2024. In addition, the shift in the calving period caused by the same virus had a further strengthening effect on milk production growth in the second half of the year.

According to Statistics Netherlands (CBS), the Netherlands had 1.53 million dairy cows at the beginning of April 2025, almost 1% fewer than a year earlier. The decline in the dairy herd therefore continued, although at a slower pace than in the previous year. Dairy farmers were able to maintain more cows than expected due to high milk prices and margins remaining at a sufficient level, despite the further reduction of the derogation and the resulting higher manure disposal costs. The increase in milk production in 2025 was entirely attributable to the rise in average milk yield per cow. This was estimated at almost 9,580 kg per cow that year, 280 kg more than in 2024 (+3.0%).

## NUMBER OF DAIRY FARMERS DOWN BY ALMOST 4%

Structural developments in the dairy farming sector have been characterised by a declining number of dairy farms for several decades. Since 2015, an average of 3.1% of farms have ceased operations each year. Due to phosphate regulations, the percentage of farms that stopped farming in 2018 and 2019 was somewhat higher than in the years immediately following the end of the milk quota system on 31 March 2015.

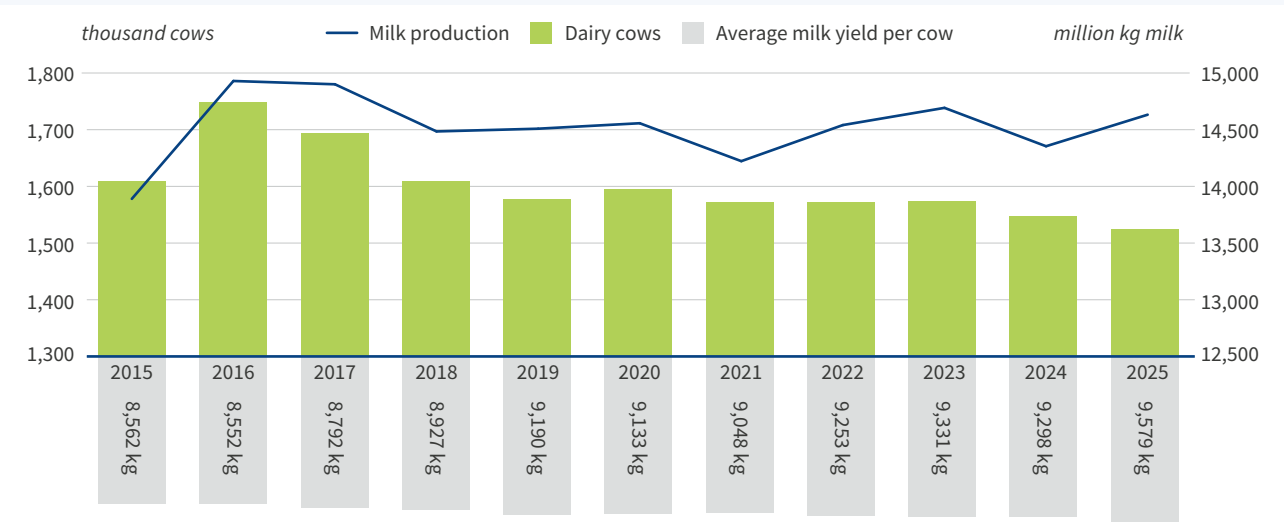
According to Statistics Netherlands (CBS), the number of dairy farmers decreased by 3.8% in 2025 to 13,361. This decline was slightly higher than in the period from 2020 to 2024, partly due to participation in government buy-out schemes. In recent years, the following factors have played a role in farmers' decisions to discontinue their businesses:

- Strong fluctuations and, at times, unfavourable margins
- Uncertainty related to nitrogen policy
- The phasing out of the derogation

The number of dairy farms with fewer than 100 dairy cows has declined rapidly over the past decades. The decline in the total number of dairy farms since 2020 can almost entirely be attributed to the reduction in this size category. In 2025, the number of farms in this category decreased by 8%, a larger decline than in 2024 (-4%) and 2023 (-7%).

In contrast, the number of dairy farms with more than 100 dairy cows increased during the period from 2020 to 2025. Only in 2024 did this size category experience a temporary decline. In 2025, larger dairy farms accounted for more than 50% of all dairy farms (2015: 33%), of which one fifth had more than 200 dairy cows (1,333 farms). In 2025, an average Dutch dairy farm kept 114 dairy cows, compared with 111 in 2024.

## DAIRY CATTLE AND MILK PRODUCTION



Source: CBS, RVO, ZuivelNL

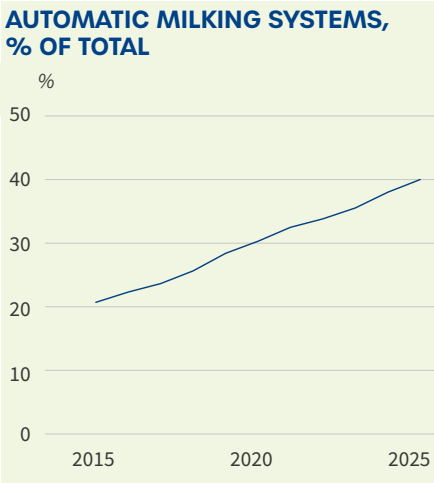
## DAIRY FARMS: CLASSIFIED ACCORDING TO THE NUMBER OF DAIRY COWS PER FARM

|                                | 2015   | 2020   | 2021   | 2022   | 2023   | 2024   | 2025   |
|--------------------------------|--------|--------|--------|--------|--------|--------|--------|
| Less than 100 dairy cows       | 12,248 | 9,260  | 8,785  | 8,062  | 7,465  | 7,201  | 6,628  |
| Percentage of total            | 67%    | 59%    | 58%    | 55%    | 52%    | 52%    | 50%    |
| Between 100 and 200 dairy cows | 5,272  | 5,400  | 5,362  | 5,473  | 5,513  | 5,393  | 5,400  |
| Percentage of total            | 29%    | 34%    | 35%    | 37%    | 39%    | 39%    | 40%    |
| 200 dairy cows, and more       | 745    | 1,071  | 1,104  | 1,194  | 1,286  | 1,290  | 1,333  |
| Percentage of total            | 4%     | 7%     | 7%     | 8%     | 9%     | 9%     | 10%    |
| Total                          | 18,265 | 15,731 | 15,251 | 14,729 | 14,264 | 13,884 | 13,361 |

Source: Statistics Netherlands (CBS)

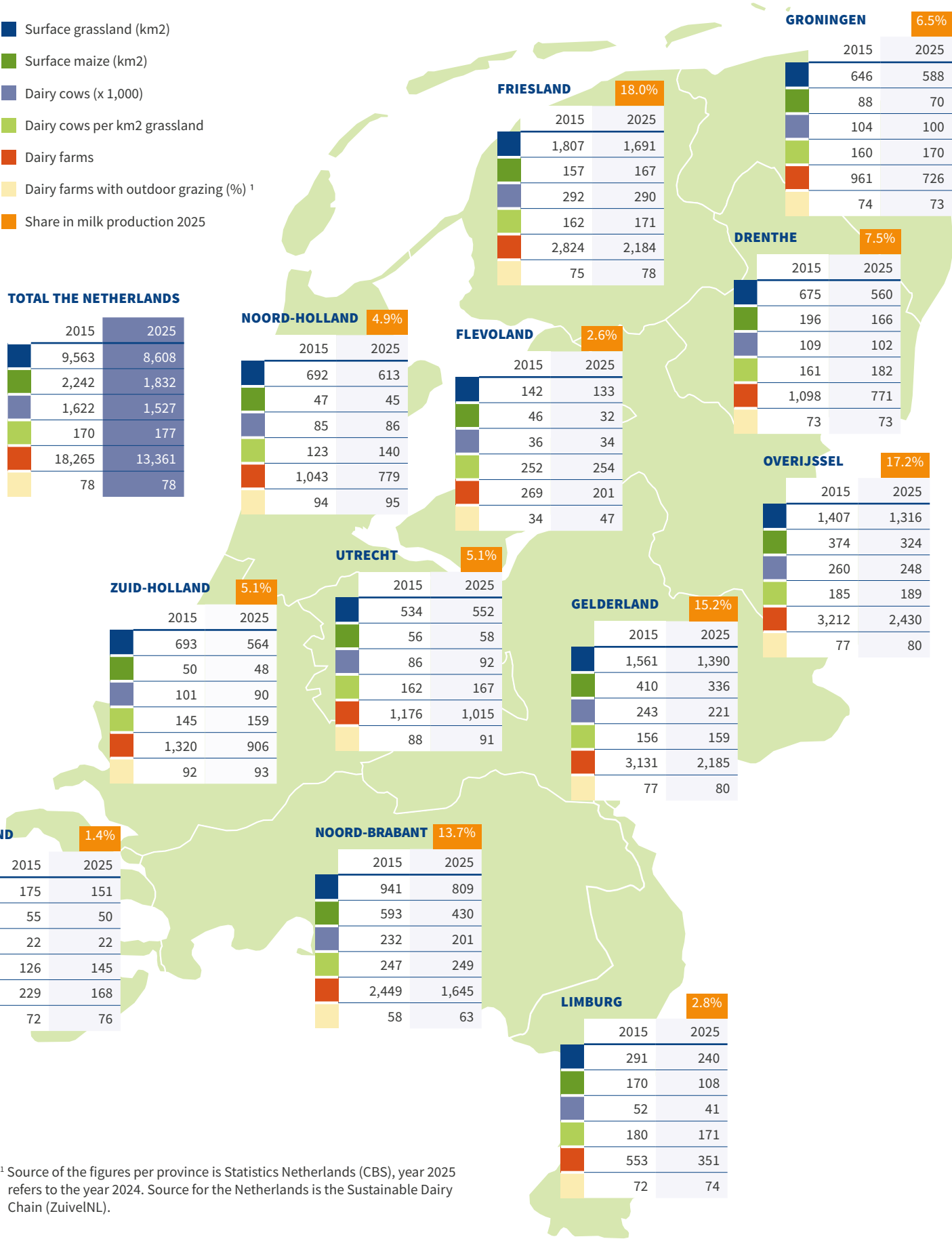
## DAIRY FARMS, CLASSIFIED ACCORDING TO THE TYPE OF MILKING PARLOUR

|                           | 2015   | 2020   | 2021   | 2022   | 2023   | 2024   | 2025   |
|---------------------------|--------|--------|--------|--------|--------|--------|--------|
| Automatic milking systems | 3,705  | 4,479  | 4,650  | 4,763  | 4,896  | 5,097  | 5,255  |
| Herringbone parlours      | 7,680  | 5,104  | 4,742  | 4,384  | 3,861  | 3,504  | 3,160  |
| Parallel parlours         | 3,409  | 3,485  | 3,431  | 3,329  | 3,171  | 3,007  | 2,860  |
| Rotary parlours           | 827    | 810    | 792    | 784    | 762    | 727    | 682    |
| Tied up stables           | 1,326  | 787    | 736    | 675    | 570    | 526    | 478    |
| Swingover parlours        | 383    | 458    | 454    | 459    | 459    | 455    | 433    |
| Tandem parlours           | 612    | 369    | 340    | 306    | 242    | 215    | 196    |
| Total                     | 17,942 | 15,492 | 15,145 | 14,700 | 13,961 | 13,531 | 13,064 |



Source: Quality and Maintenance of Milking Installations (Qlip)

KEY FIGURES DAIRY FARMING PER PROVINCE



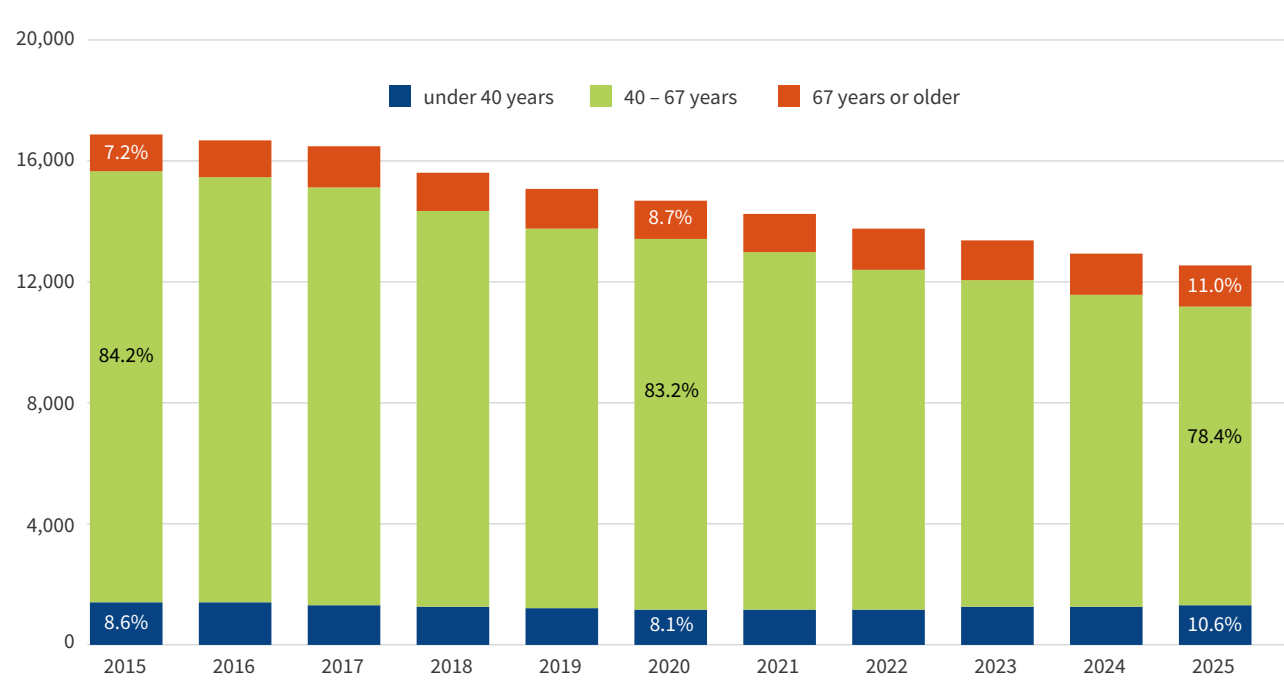
Source: CRV, Statistics Netherlands (CBS), ZuivelNL

DAIRY FARMS BY LIVESTOCK UNIT (LU) CLASS

|                               | 2015  | 2020  | 2021  | 2022  | 2023  | 2024  | 2025  |
|-------------------------------|-------|-------|-------|-------|-------|-------|-------|
| Up to 2 LU/ha                 | 31.5% | 40.6% | 40.8% | 38.4% | 37.0% | 40.1% | 41.5% |
| 2 to 2.3 LU/ha                | 22.2% | 25.4% | 24.8% | 24.3% | 23.2% | 22.4% | 20.5% |
| 2.3 to 2.6 LU/ha              | 17.2% | 14.5% | 14.6% | 15.6% | 15.7% | 14.7% | 14.5% |
| 2.6 LU/ha or more             | 29.0% | 19.3% | 19.6% | 21.6% | 23.9% | 22.7% | 23.2% |
| No utilised agricultural area | 0.1%  | 0.1%  | 0.2%  | 0.1%  | 0.1%  | 0.2%  | 0.3%  |

Source: Statistics Netherlands (CBS)

DAIRY FARM OWNERS AND MANAGERS BY AGE



| Age group         | 2015          |            | 2020          |            | 2023          |            |
|-------------------|---------------|------------|---------------|------------|---------------|------------|
|                   | male          | female     | male          | female     | male          | female     |
| under 40 years    | 1,388         | 41         | 1,130         | 48         | 1,184         | 74         |
| 40 – 67 years     | 13,822        | 239        | 11,844        | 250        | 10,439        | 241        |
| 67 years or older | 1,160         | 49         | 1,233         | 37         | 1,245         | 32         |
| <b>Total</b>      | <b>16,370</b> | <b>329</b> | <b>14,207</b> | <b>335</b> | <b>12,868</b> | <b>347</b> |

Source: Statistics Netherlands (CBS)

# Milk processing

## SIGNIFICANT RISE IN INTERNATIONAL MILK DELIVERIES

Milk deliveries in the main dairy-exporting countries increased by as much as 3.1% in 2025, adjusted for the leap year effect, representing an increase of more than 11 billion kg. This growth was considerably higher than in 2023 (+0.4%) and 2024 (+0.6%) and represented the strongest increase in the past 10 years. In the first quarter of 2025, growth was still limited, after which monthly milk deliveries increased by around 2% between April and July. From August onwards, the pace of growth accelerated, with a particularly strong increase in the final quarter.

Milk deliveries in the EU-27 rose significantly by 2.1%, following several years of limited or no growth. A strong increase was recorded from August onwards, with growth accelerating further in the final months of 2025. Ireland (+5.0%), Poland (+3.6%) and Italy (+2.4%) recorded the largest increases in 2025. Milk deliveries also increased in Western Europe, including Belgium (+0.7%), Germany (+1.3%), France (+2.2%) and the Netherlands (+2.2%). These countries had been significantly affected by bluetongue in 2024, resulting in lower milk deliveries that year.

The United States showed a similar trend to the EU, with strong growth (+2.8%) after several years of stagnation. Most of the increase occurred in the second half of the year. This rise was driven by an increase in the number of dairy cows and higher milk yields. The largely diminished negative impact of avian influenza also contributed to the latter. Milk production in the South American countries of Argentina (+9.9%) and Uruguay (+8.6%) showed the strongest relative growth. In Argentina, the increase was driven by improved profitability in dairy farming and a recovery of the domestic economy. In Uruguay, supportive government policies and favourable weather conditions contributed to this growth.

Oceania experienced a mixed picture in 2025. On the one hand, New Zealand’s milk deliveries rose by 2.2%. This was driven by favourable weather conditions, an increase in average milk yield per cow and high milk prices. On the other hand, Australian milk production declined (-1.8%), making it a negative exception among the major dairy-exporting countries. Drought and lower margins resulted in a more cautious approach to production expansion for most of the year.

## MORE THAN 1 BILLION KG OF CHEESE PRODUCED

In 2025, the Dutch dairy industry processed 14.1 billion kg of milk, more than 2% above the 2024 level. Approximately 62% of this volume was used for cheese production. The increase in milk availability was mainly reflected in higher production of cheese (+4%) and drinking milk and other fresh milk products (+2%). Cheese production (including cottage cheese) exceeded 1 billion kg in 2025. Around 60% of this consisted of Gouda-type cheese.

In contrast, butter and butter oil production decreased by 2%. The volume of skimmed milk powder remained virtually unchanged. Non-skimmed milk powder is estimated to have shown the strongest decline in production (-8%).

## NET TURNOVER REMAINED UNCHANGED

At the end of 2025, the Dutch milk processing industry consisted of 27 companies with a total of 52 production sites. Five of these companies are cooperatives, processing milk at 22 locations. The net turnover of the dairy industry (including the production of ice cream and other frozen dairy products) amounted to € 19.9 billion in 2024, virtually unchanged from 2023.

## INDUSTRIAL DAIRY PRODUCTION

million kg

|                                                          | 2015   | 2020   | 2024   | 2025 <sup>1</sup> | 2025/<br>2024 |
|----------------------------------------------------------|--------|--------|--------|-------------------|---------------|
| Milk delivered to dairies                                | 13,331 | 14,013 | 13,732 | 13,989            | 1.9%          |
| Milk available for processing                            | 13,308 | 14,620 | 13,804 | 14,102            | 2.2%          |
| Drinking milk and other fresh milk products <sup>2</sup> | 967    | 1,102  | 1,016  | 1,035             | 1.9%          |
| Cheese (including cottage cheese)                        | 845    | 970    | 974    | 1,016             | 4.3%          |
| Butter and butteroil                                     | 217    | 206    | 178    | 174               | -2.3%         |
| Non-skimmed milk powder <sup>3</sup>                     | 136    | 135    | 117    | 108               | -7.7%         |
| Skimmed milk powder                                      | 57     | 64     | 119    | 119               | -0.1%         |

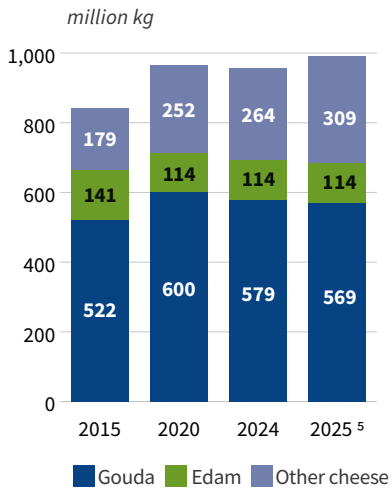
<sup>1</sup> Based on the development in the monthly figures.

<sup>2</sup> Excluding added ingredients, including cream.

<sup>3</sup> Estimate.

Source: RVO, ZuivelNL

## CHEESE PRODUCTION PER TYPE <sup>4</sup>



<sup>4</sup> Excluding cottage cheese.

<sup>5</sup> Estimation.

Source: RVO, ZuivelNL

## DEVELOPMENT OF MILK DELIVERIES IN MAJOR EXPORTING COUNTRIES <sup>6</sup>

billion kg

|                           | 2015         | 2020         | 2024         | 2025         | Average<br>annual<br>growth<br>2015-2025 | Average<br>annual<br>growth<br>2020-2025 | Relative<br>development<br>compared to<br>2024 | Absolute<br>development<br>compared to<br>2024 |
|---------------------------|--------------|--------------|--------------|--------------|------------------------------------------|------------------------------------------|------------------------------------------------|------------------------------------------------|
| <b>EU-27</b>              | <b>136.3</b> | <b>144.1</b> | <b>144.8</b> | <b>147.8</b> | <b>0.8%</b>                              | <b>0.5%</b>                              | <b>2.1%</b>                                    | <b>3.0</b>                                     |
| <i>Germany</i>            | <i>31.5</i>  | <i>31.7</i>  | <i>31.2</i>  | <i>31.6</i>  | <i>0.0%</i>                              | <i>-0.1%</i>                             | <i>1.3%</i>                                    | <i>0.4</i>                                     |
| <i>France</i>             | <i>25.1</i>  | <i>24.5</i>  | <i>23.7</i>  | <i>24.2</i>  | <i>-0.4%</i>                             | <i>-0.2%</i>                             | <i>2.2%</i>                                    | <i>0.5</i>                                     |
| <i>Netherlands</i>        | <i>13.3</i>  | <i>13.9</i>  | <i>13.6</i>  | <i>13.9</i>  | <i>0.4%</i>                              | <i>0.0%</i>                              | <i>2.2%</i>                                    | <i>0.3</i>                                     |
| <i>Poland</i>             | <i>10.9</i>  | <i>12.4</i>  | <i>13.4</i>  | <i>13.9</i>  | <i>2.5%</i>                              | <i>2.3%</i>                              | <i>3.6%</i>                                    | <i>0.5</i>                                     |
| <i>Italy</i>              | <i>11.2</i>  | <i>12.6</i>  | <i>13.1</i>  | <i>13.5</i>  | <i>1.9%</i>                              | <i>1.3%</i>                              | <i>2.4%</i>                                    | <i>0.3</i>                                     |
| <i>Ireland</i>            | <i>6.6</i>   | <i>8.5</i>   | <i>8.7</i>   | <i>9.1</i>   | <i>3.3%</i>                              | <i>1.3%</i>                              | <i>5.0%</i>                                    | <i>0.4</i>                                     |
| <i>Denmark</i>            | <i>5.3</i>   | <i>5.7</i>   | <i>5.7</i>   | <i>5.8</i>   | <i>0.9%</i>                              | <i>0.4%</i>                              | <i>1.4%</i>                                    | <i>0.1</i>                                     |
| <i>Belgium</i>            | <i>3.7</i>   | <i>4.3</i>   | <i>4.5</i>   | <i>4.5</i>   | <i>2.0%</i>                              | <i>0.9%</i>                              | <i>0.7%</i>                                    | <i>0.0</i>                                     |
| <i>Other</i>              | <i>28.7</i>  | <i>30.4</i>  | <i>30.9</i>  | <i>31.3</i>  | <i>0.9%</i>                              | <i>0.6%</i>                              | <i>1.5%</i>                                    | <i>0.5</i>                                     |
| <b>United States</b>      | 94.6         | 101.0        | 102.2        | 105.1        | 1.1%                                     | 0.8%                                     | 2.8%                                           | 2.9                                            |
| <b>New Zealand</b>        | 21.5         | 21.8         | 21.5         | 21.9         | 0.2%                                     | 0.1%                                     | 2.2%                                           | 0.5                                            |
| <b>United Kingdom</b>     | 15.2         | 15.4         | 15.4         | 16.2         | 0.7%                                     | 1.0%                                     | 5.3%                                           | 0.8                                            |
| <b>Argentina</b>          | 12.4         | 11.4         | 10.9         | 12.0         | -0.4%                                    | 0.9%                                     | 9.9%                                           | 1.1                                            |
| <b>Australia</b>          | 10.1         | 9.1          | 8.6          | 8.5          | -1.8%                                    | -1.3%                                    | -1.8%                                          | -0.2                                           |
| <b>Uruguay</b>            | 2.0          | 2.1          | 2.1          | 2.3          | 1.1%                                     | 1.3%                                     | 8.6%                                           | 0.2                                            |
| <b>Other <sup>7</sup></b> | 50.9         | 55.6         | 58.1         | 61.2         | 1.9%                                     | 1.9%                                     | 5.3%                                           | 3.1                                            |
| <b>Total</b>              | <b>343.0</b> | <b>360.5</b> | <b>363.5</b> | <b>374.9</b> | <b>0.9%</b>                              | <b>0.8%</b>                              | <b>3.1%</b>                                    | <b>11.4</b>                                    |

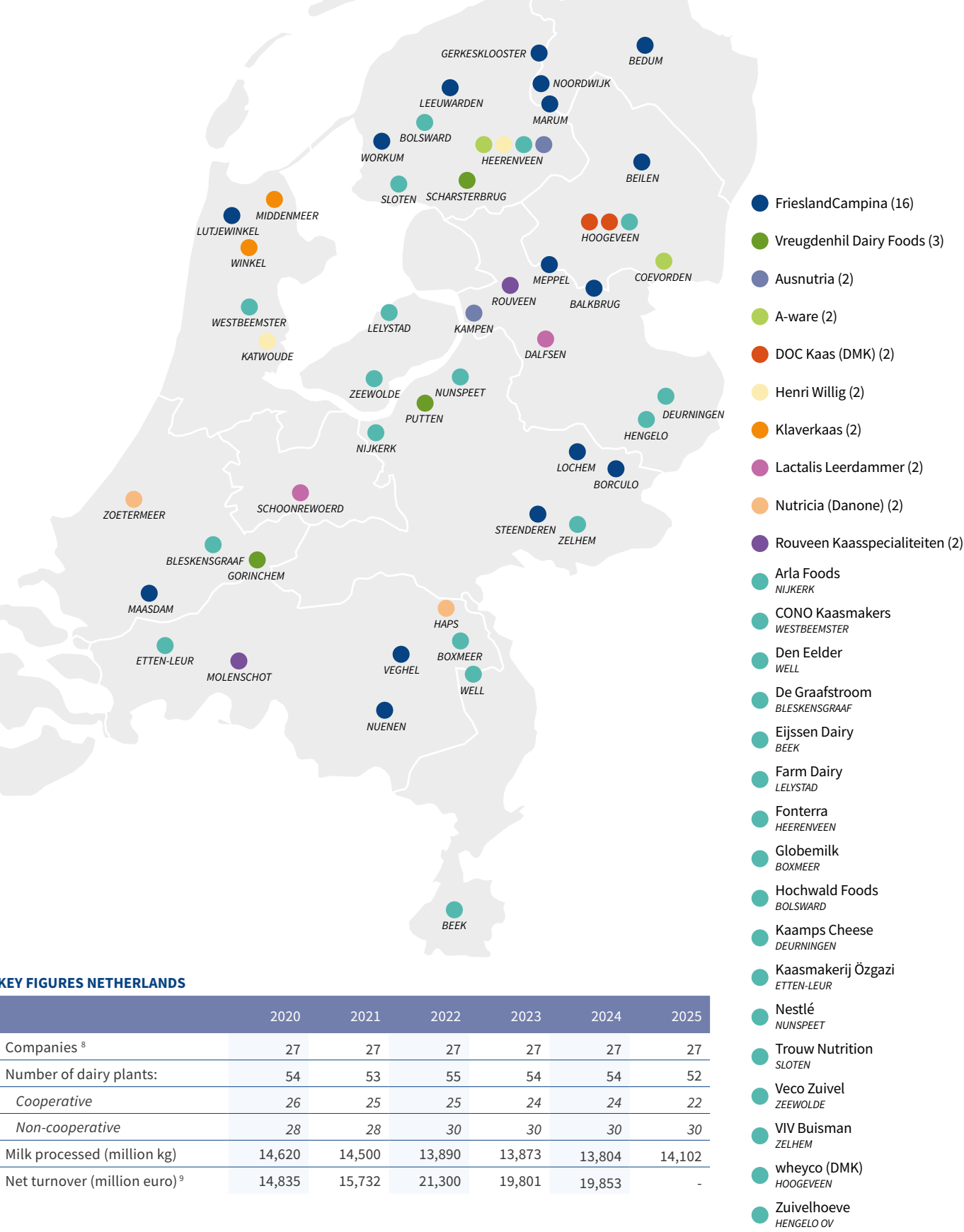
<sup>6</sup> Adjusted for the leap day in 2020 and 2024.

<sup>7</sup> Belarus, Brazil, Canada, Chile and Türkiye.

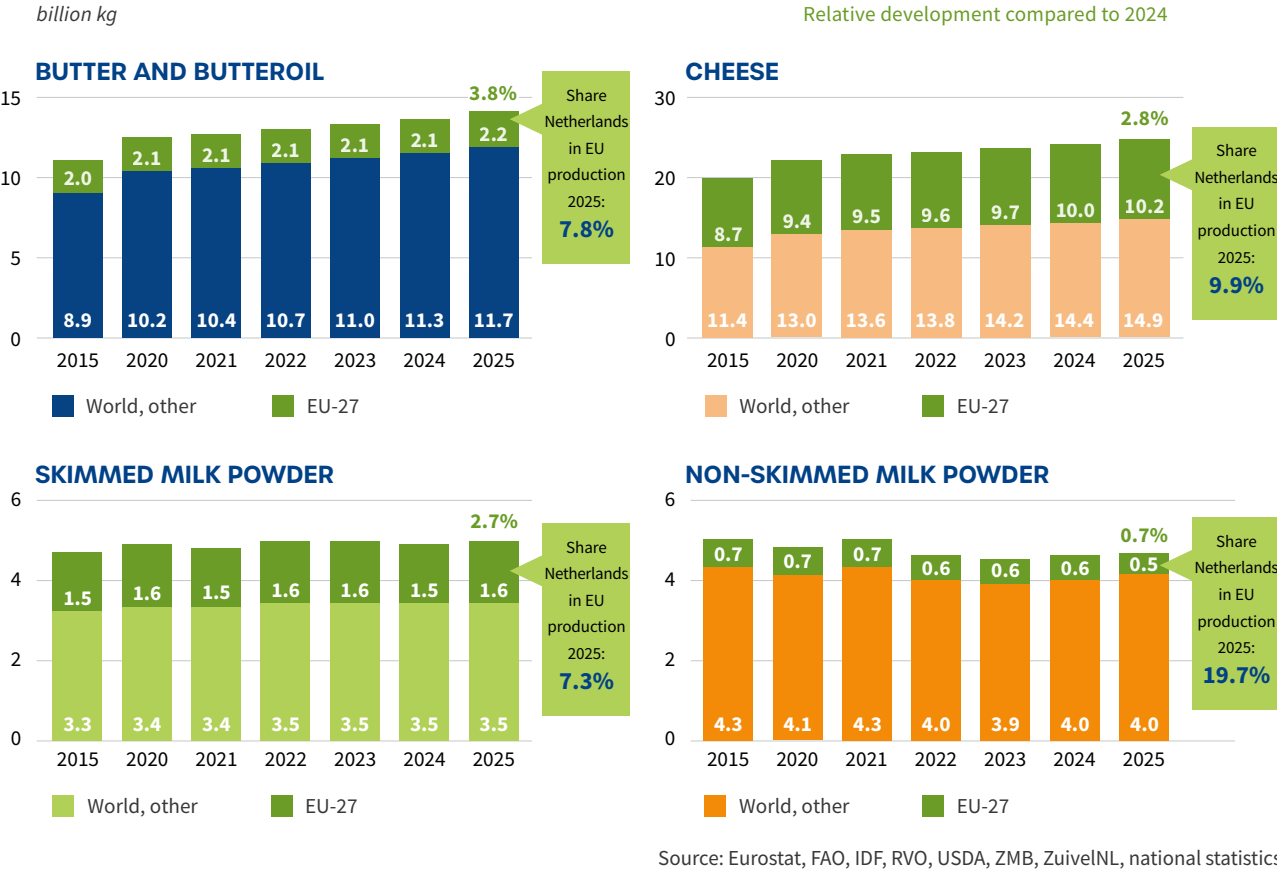
Source: Eurostat, RVO, ZuivelNL, national statistics

GEOGRAPHICAL SPREAD OF MILK PROCESSING INDUSTRY

Number of dairy plants as of 31 December 2025

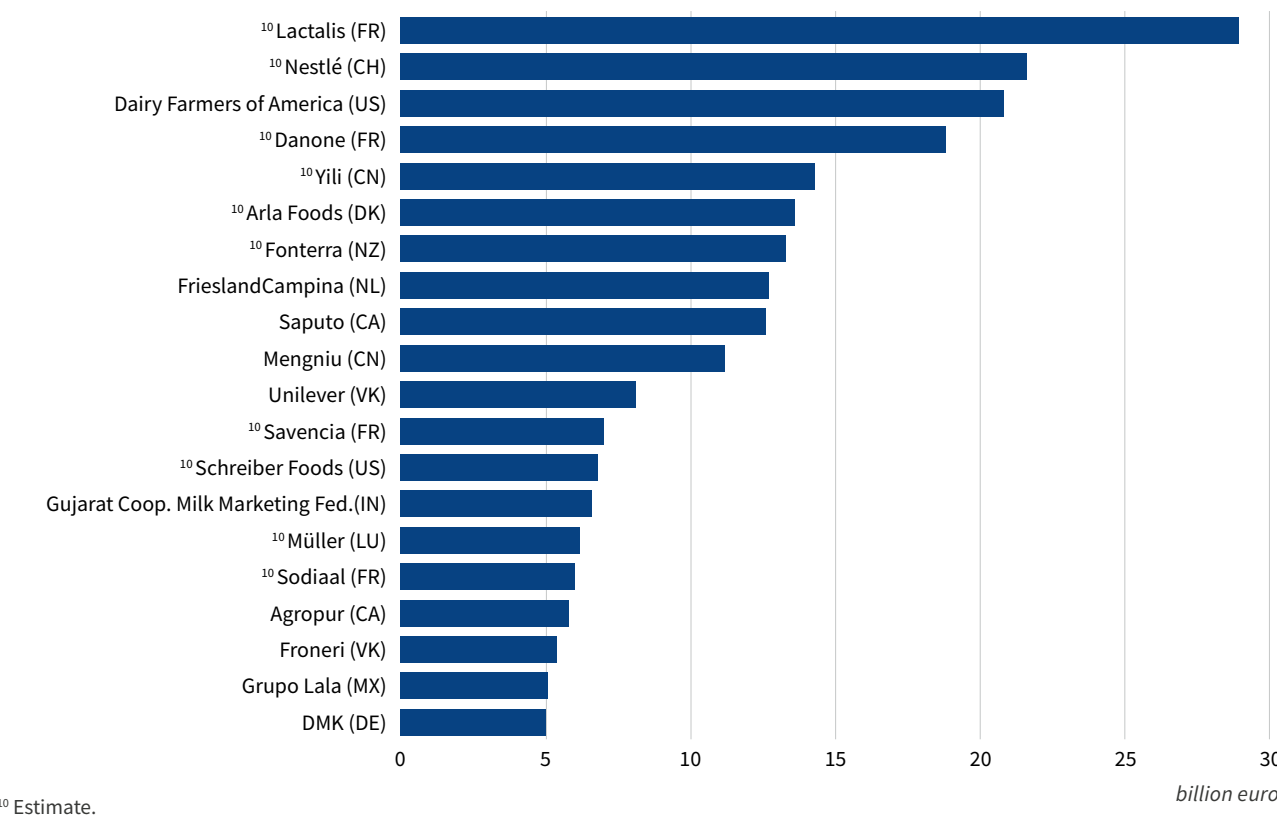


GLOBAL PRODUCTION OF A NUMBER OF DAIRY PRODUCTS



TOP-20 LARGEST DAIRY COMPANIES

Based on estimates from RaboResearch, using 2024 financial results plus mergers and acquisitions completed between January 1, 2025 and June 30, 2025.



# Sustainability

## SUSTAINABLE DAIRY CHAIN

Dairy farmers and dairy companies work every day to ensure the future viability of their businesses and the supply chain as a whole. They continually respond to society's evolving expectations and requirements. Through their collaboration within ZuivelNL, the sector is working towards a sustainable dairy chain in which high-quality food is produced while respecting people, animals and the environment.

Within the ZuivelNL framework, the sector aims to create a future perspective for the dairy sector by taking a proactive approach and addressing the selected themes through a science-based programme. The objective of the programme is to enable the sector to retain as much control as possible over how societal challenges are addressed and regulatory targets are achieved.

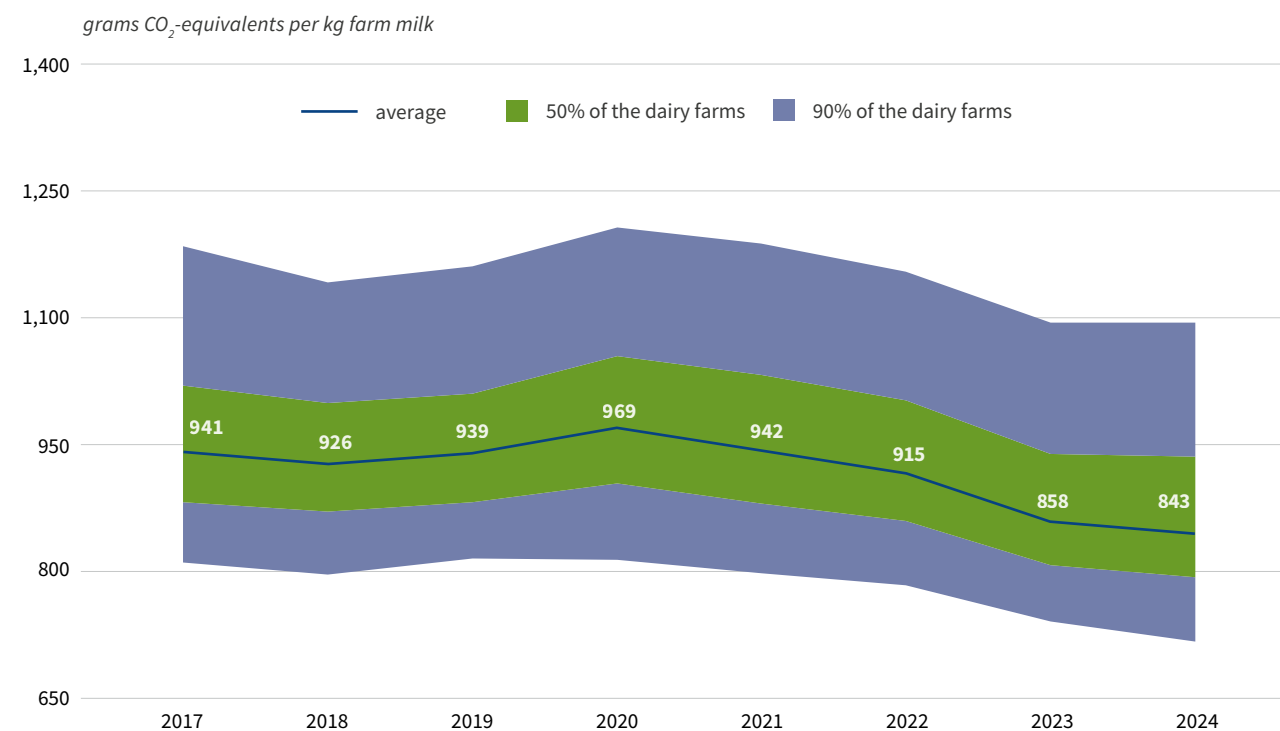
Within the ZuivelNL Sustainable Dairy Chain programme, the dairy sector is working on:

- An integrated approach to the themes of animal health & welfare, biodiversity and climate. The biodiversity theme consists of the sub-themes nitrogen (ammonia), water quality, soil, land use and nature and landscape. Outdoor grazing is relevant across all themes.
- A technically and scientifically grounded programme that supports companies in the sector in addressing challenges driven by societal and legal objectives.
- A programme based on uniform tools, methodologies, calculation rules (framework) and monitoring

## REPORTING

Wageningen Social & Economic Research prepares annual reports for each theme to monitor the progress of the sector's efforts.

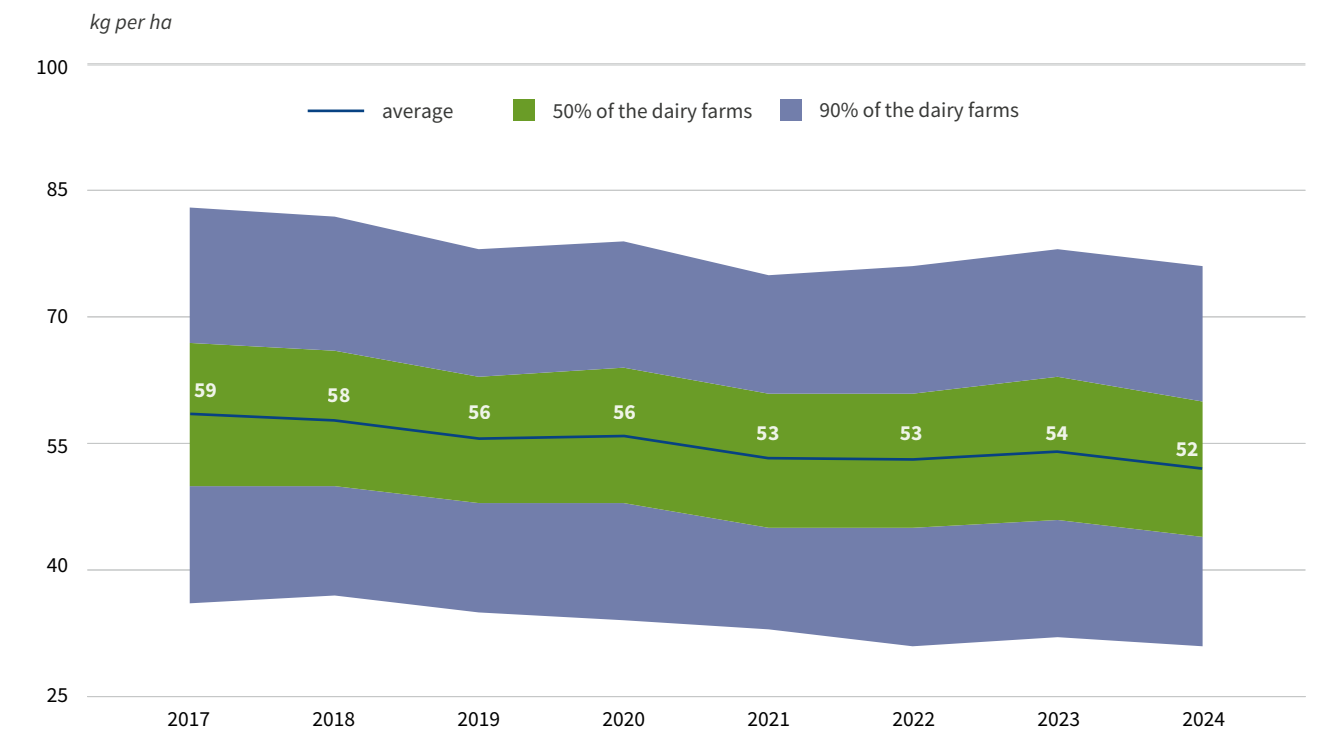
## GREENHOUSE GAS EMISSIONS EXCLUDING PEAT EMISSIONS <sup>1</sup>



<sup>1</sup> Greenhouse gases = gases in the Earth's atmosphere with the ability to absorb heat radiation and gradually re-emit it in all directions. This contributes to the retention of heat in the atmosphere, thereby increasing and maintaining the equilibrium temperature. This phenomenon is known as the greenhouse effect.

Source: input data from KringloopWijzer (ZuivelNL) and the KringloopWijzer model

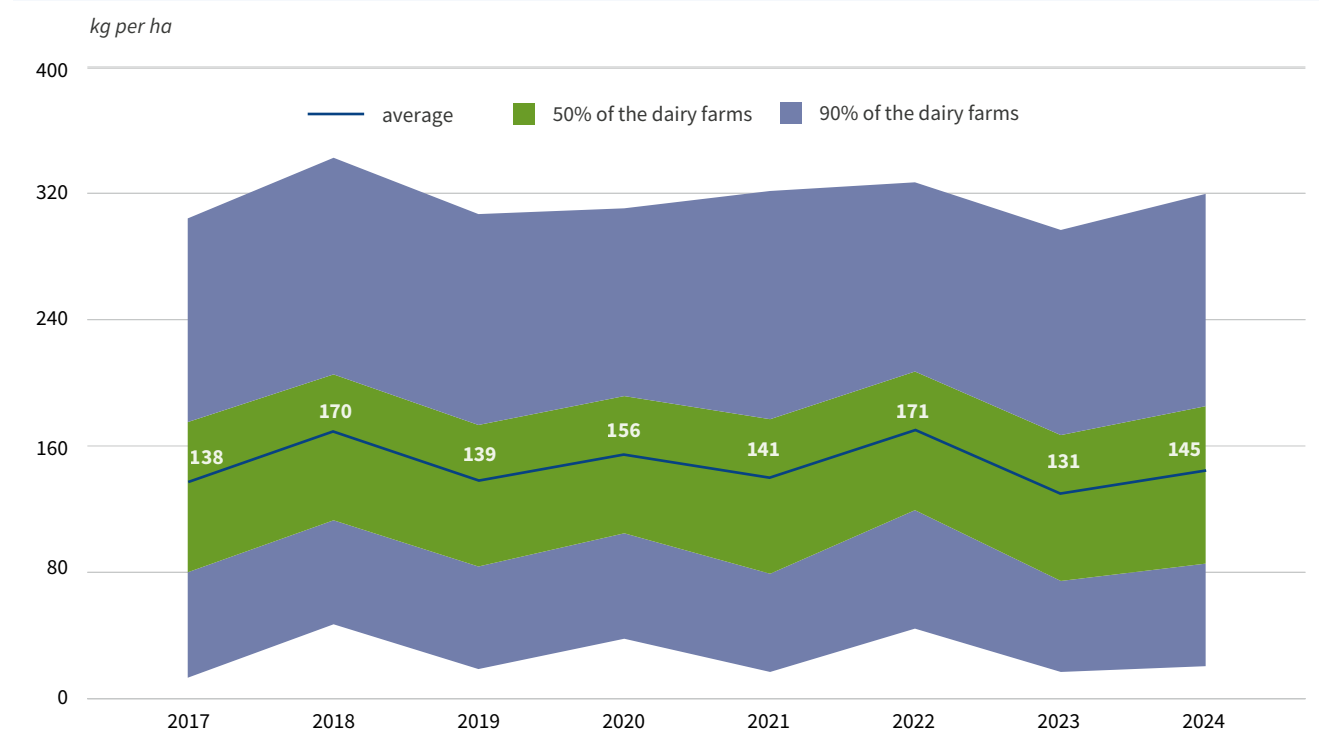
## AMMONIA EMISSION <sup>2</sup>



<sup>2</sup> Ammonia = a nitrogen compound linked to hydrogen (NH<sub>3</sub>). It is an undesirable gaseous emission. The nitrogen from the diet that is not utilized can form ammonia.

Source: input data from KringloopWijzer (ZuivelNL) and the KringloopWijzer model

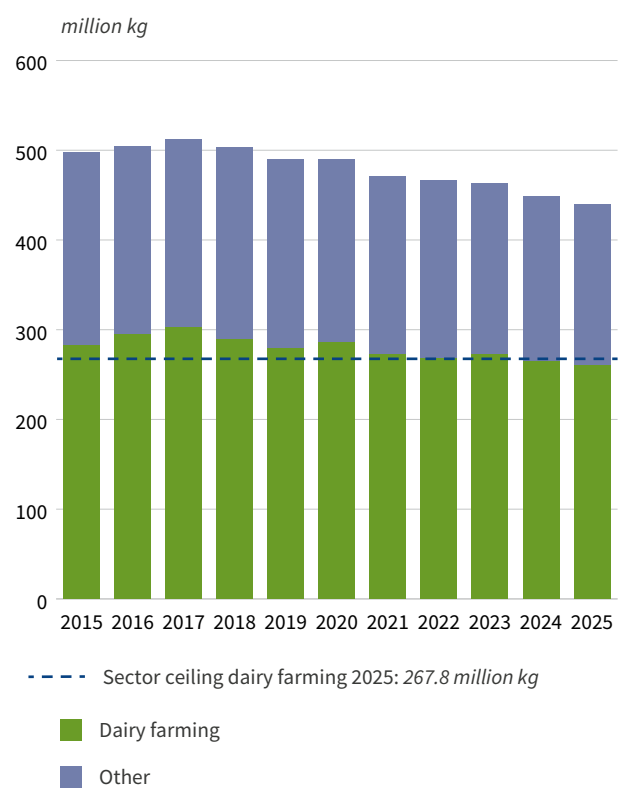
## NITROGEN SURPLUS ON DAIRY FARMS <sup>3</sup>



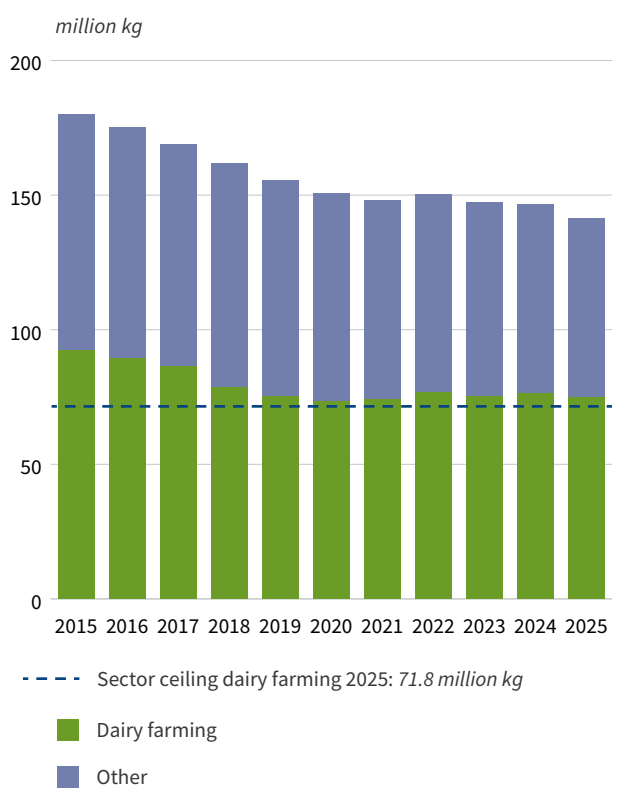
<sup>3</sup> Nitrogen surplus = the amount of nitrogen that can be used for fertilization (organic, pasture manure, artificial fertilizer, compost, deposition, mineralization, legumes) minus the amount of nitrogen harvested from the land.

Source: input data from KringloopWijzer (ZuivelNL) and the KringloopWijzer model

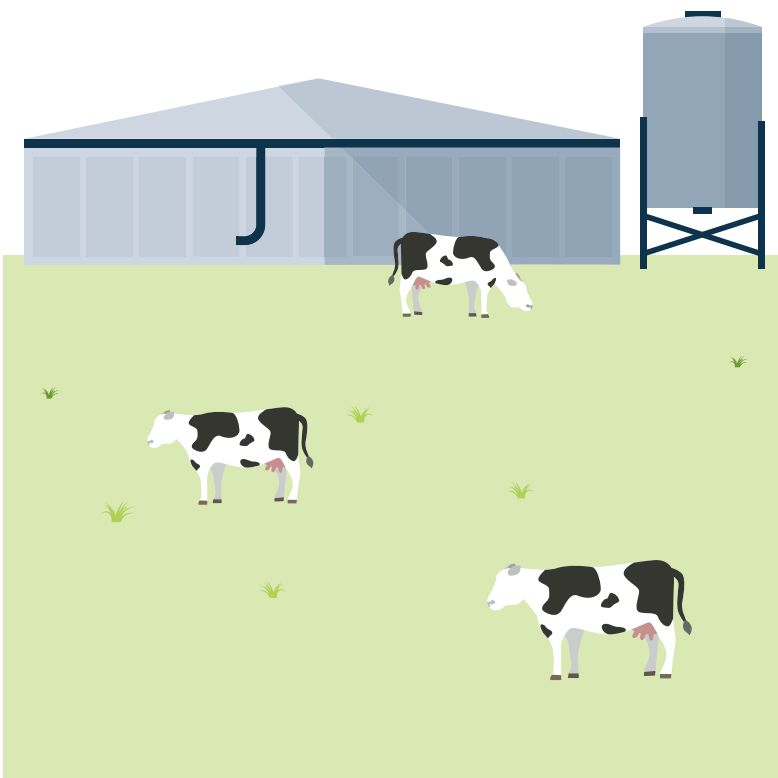
NITROGEN PRODUCTION IN ANIMAL MANURE



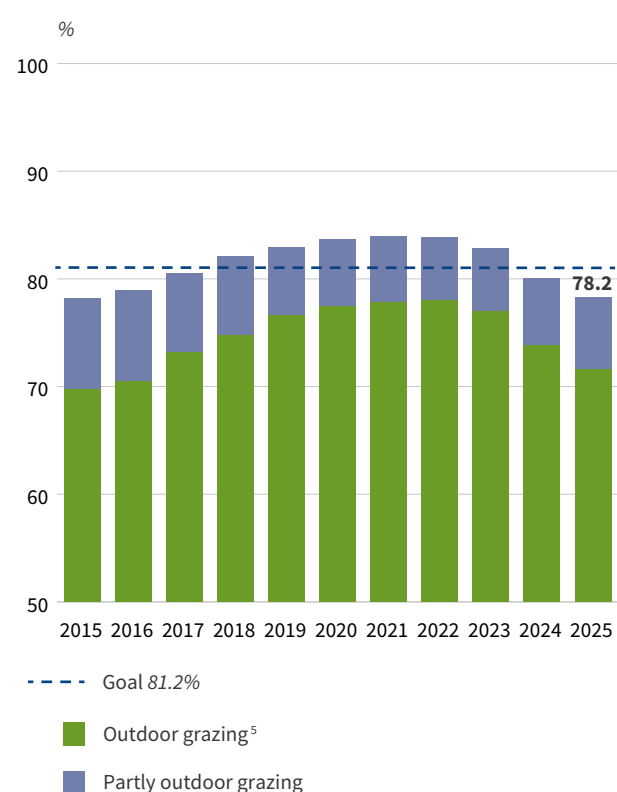
PHOSPHATE PRODUCTION IN ANIMAL MANURE



Source: Statistics Netherlands (CBS)



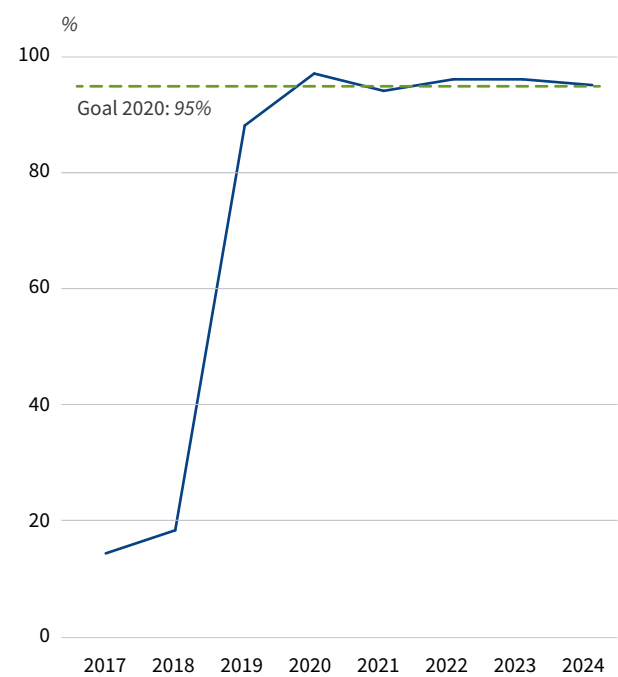
OUTDOOR GRAZING



<sup>5</sup> With outdoor grazing, the dairy cows are outside for at least 120 days and at least 6 hours a day on an annual basis.

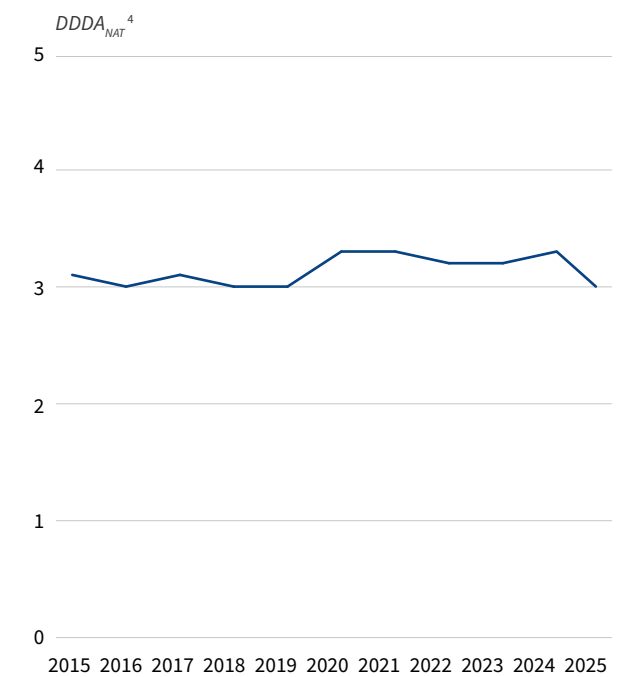
Source: Sustainable Dairy Chain (ZuivelNL)

PERCENTAGE OF DAIRY FARMS THAT HAVE IMPLEMENTED THE KOEKOMPAS WITH WELFARE MONITOR



Source: Stichting Zuivelplatform

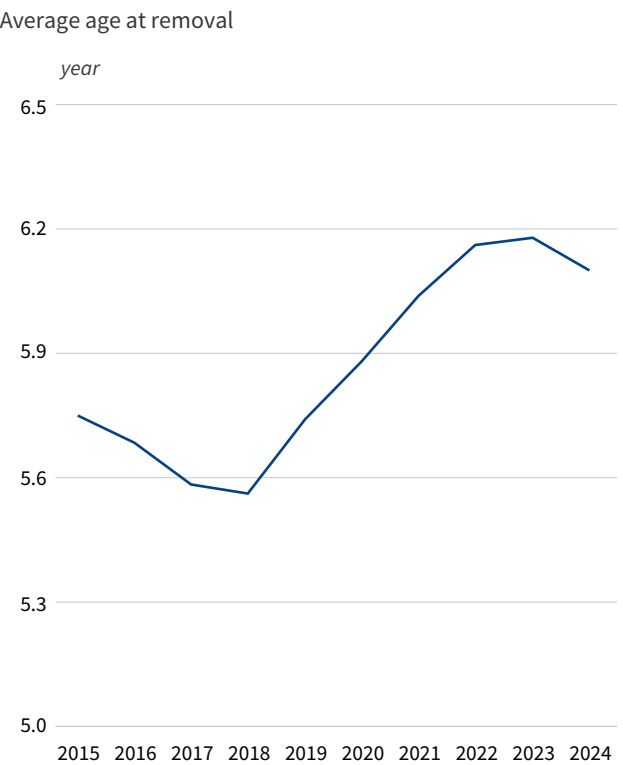
DEVELOPMENT OF AVERAGE ANTIBIOTIC USE BY DAIRY FARMS ACCORDING TO THE NETHERLANDS VETERINARY MEDICINES INSTITUTE



<sup>4</sup> DDDA<sub>NAT</sub> (Defined Daily Dose Animal, National: use of antibiotics at national level).

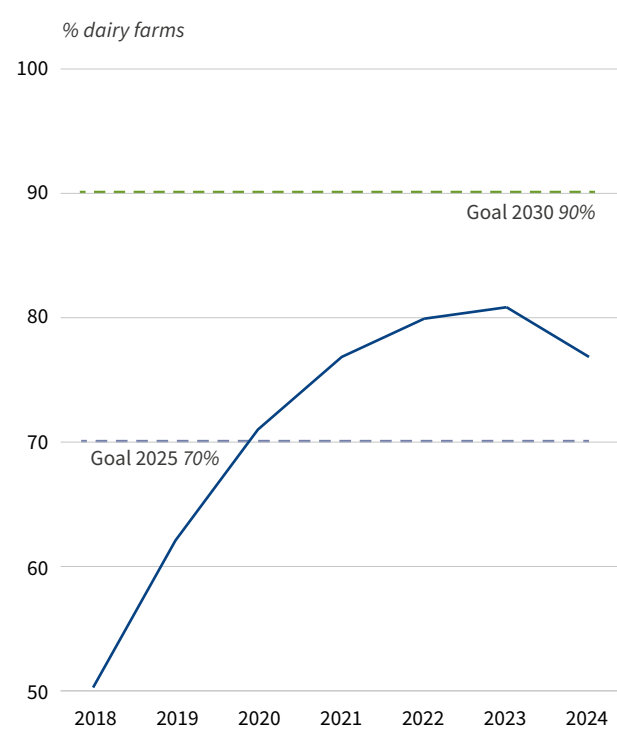
Source: the Netherlands Veterinary Medicines Institute (SDa)

LIFESPAN OF DAIRY COWS



Source: Sustainable Dairy Chain (ZuivelNL)

SHARE OF DAIRY FARMS WITH A LIFESPAN AT OR ABOVE THE SECTOR AVERAGE IN 2018



Source: Sustainable Dairy Chain (ZuivelNL)

EXPORT VALUE CONTINUES TO RISE

The export value of Dutch dairy products increased for the second consecutive year. In 2025, export value reached € 11.87 billion, more than 4% higher than in the previous year. As in 2024, the increase was mainly driven by higher market prices for products with a high fat content. The sharp decline in market prices during the second half of the year only started to affect export prices in the final quarter. Cheese and skimmed milk powder recorded growth in both value and volume. For skimmed milk powder, the increase was driven by higher volumes, while the average price level was slightly lower. As in 2024, the increase in export value of butter and butter oil (+6%) was accompanied by a decline in volume (-10%). For whole milk powder, the decline in value was smaller than the volume decrease.

The EU has traditionally been by far the most important sales region for Dutch dairy products. In 2025, trade to EU member states represented a value of more than € 9.2 billion, accounting for almost 78% of total export value. Including other European countries, this share increased to 81%. Exports to Belgium, Germany and France alone represented a value of almost € 6.5 billion that year, accounting for nearly 55% of total Dutch dairy export value.

The Netherlands is one of the most active EU member states on the global market. The Dutch share in global dairy trade, which amounted to approximately 96.0 billion kg of milk equivalents in 2025, was 3.6%. The three most important export destinations outside the EU are China (including Hong Kong), the United Kingdom and the Republic of Korea, together accounting for almost 6% of total Dutch dairy exports.

Cheese is traditionally the most important dairy product exported by the Netherlands, accounting for almost half of total Dutch dairy export value each year. The export value of cheese rose by almost 5% in 2025 to € 5.7 billion. Export volume grew less strongly (+1%) and amounted to 1.08 billion kg. Exports of Dutch cheese varieties (Edam, Gouda and Maasdam) declined slightly, following strong growth in the previous two years.

Dutch Mozzarella exports also decreased in 2025 (-2%), bringing an end to the strong growth recorded in 2023 and 2024.

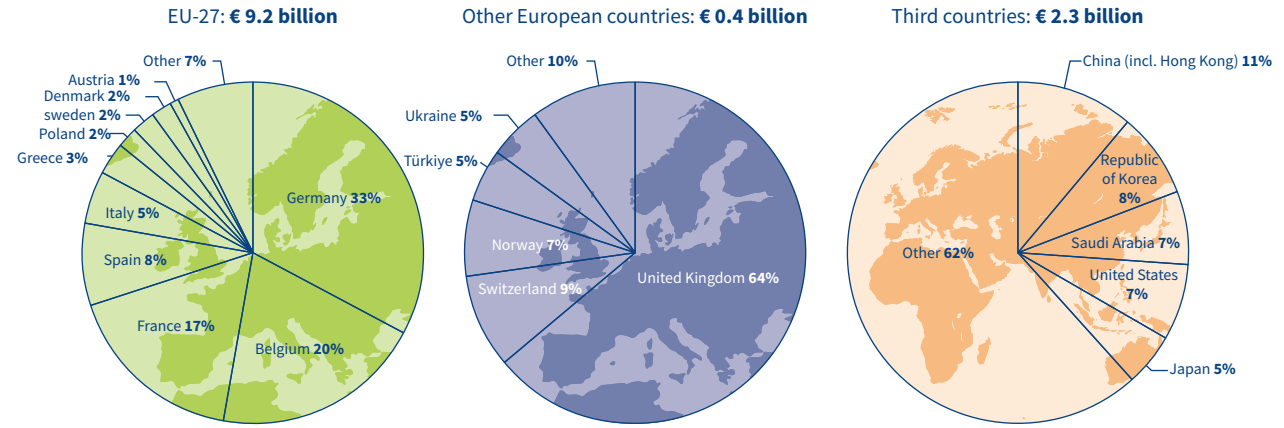
As in previous years, the additional cheese volumes traded were mainly destined for markets in the EU-27 (+2%). Cheese sales to France and Spain increased in particular, both of which have been important growth markets for Dutch products for several years. Sales to Belgium declined for the second consecutive year. A slight decline in exports to Germany was also notable, following several years of growth. Exports to third countries declined sharply again (-6%). As a result of this structural decline, the share of third countries in total cheese exports decreased from 20% in 2022 to 15% in 2025. Exports to Chile (-59%), the United Kingdom (-18%), the Republic of Korea (-18%) and Saudi Arabia (-45%) showed the largest declines. Cheese exports to Japan, which was still the most important destination outside the EU several years ago, recovered strongly in 2025 (+19%).

STRONG GROWTH IN IMPORT VALUE

In addition to being an exporter, the Netherlands is also a major importer of dairy products from other EU member states. The main countries of origin are Germany, Belgium and Ireland, which together account for two thirds of total import value. Almost 5% of dairy imports originate from outside the EU, with the largest shares coming from the United Kingdom, New Zealand and the United States.

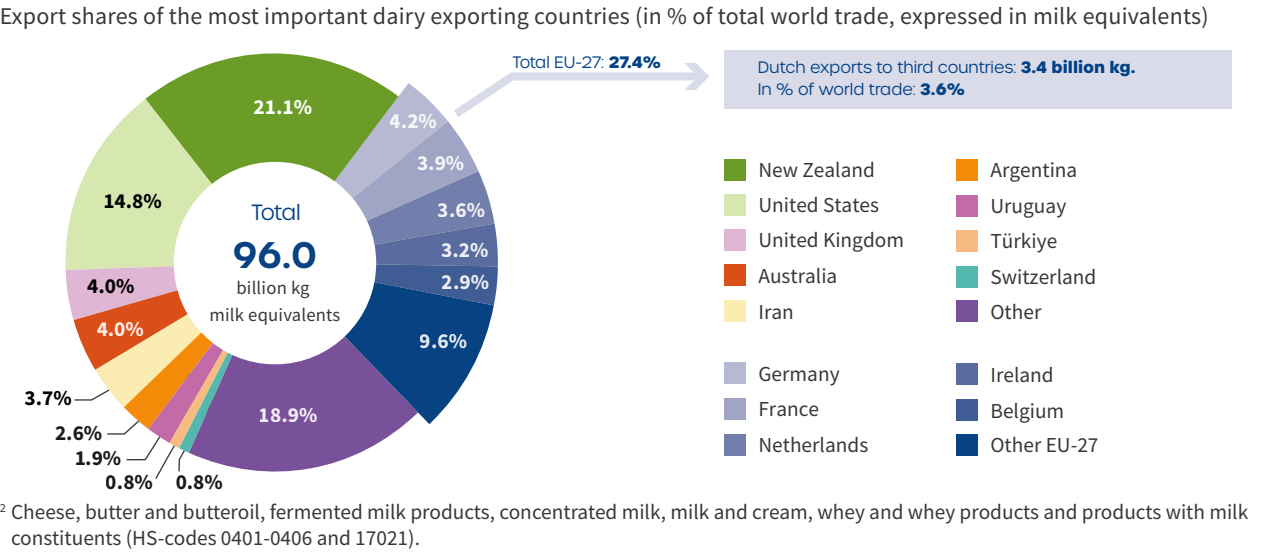
The import value of dairy products increased by 11% in 2025 to € 5.72 billion. In particular, cheese (+10%), butter and butter oil (+30%) and whey and whey products (+23%) recorded strong increases in import value. For cheese and butter and butter oil, this was largely due to a substantial increase in imported volumes. In contrast, the import volume of whey and whey products declined slightly. Milk powder imports recorded a substantial decline in both volume and value, following similar decreases in the two preceding years. The Dutch dairy trade surplus amounted to € 6.1 billion in 2025, slightly lower than in 2024.

DUTCH EXPORT VALUE<sup>1</sup> PER DESTINATION



<sup>1</sup> Cheese, butter and butteroil, fermented milk products, concentrated milk, milk and cream, whey and whey products and products with milk constituents (HS-codes 0401-0406 and 17021). Source: Eurostat, ZuivelNL

POSITION OF DUTCH DAIRY EXPORTS<sup>2</sup> ON THE WORLD MARKET



<sup>2</sup> Cheese, butter and butteroil, fermented milk products, concentrated milk, milk and cream, whey and whey products and products with milk constituents (HS-codes 0401-0406 and 17021).

Source: Comtrade, Eurostat, ZuivelNL

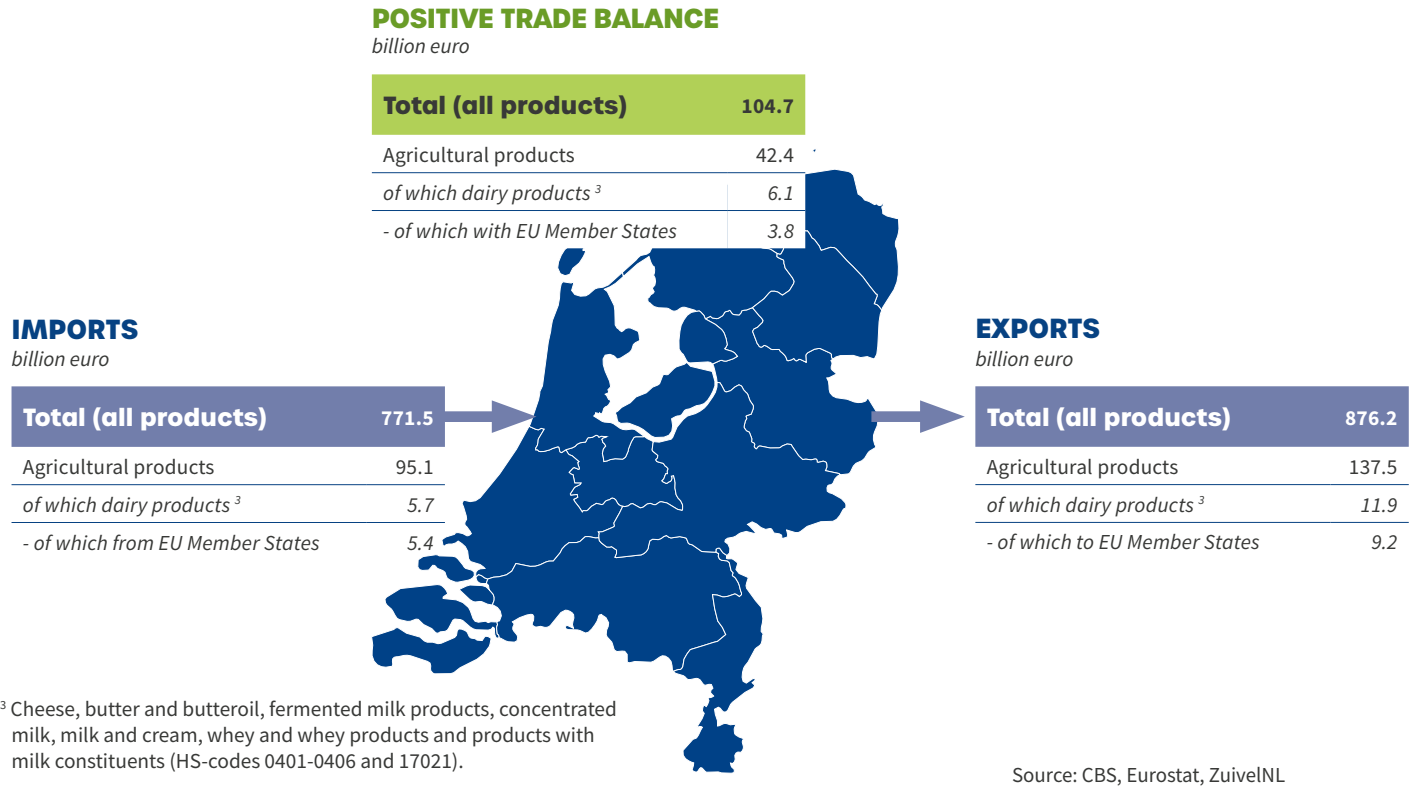
DUTCH EXPORTS TO THIRD COUNTRIES

% milk equivalents

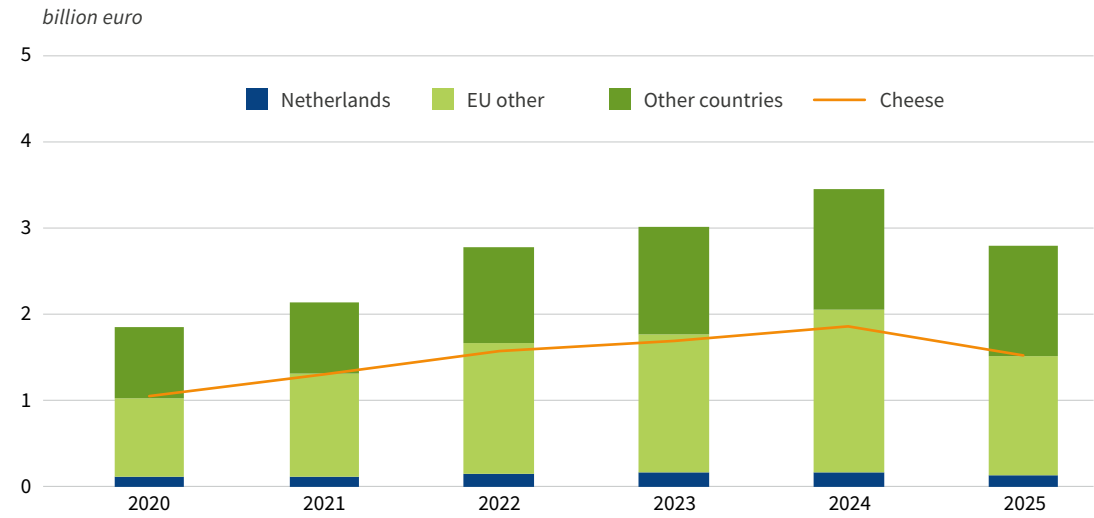
| Total:    |                                             | 3.4 billion kg |              |                 |        |
|-----------|---------------------------------------------|----------------|--------------|-----------------|--------|
| Of which: | Cheese                                      | 40.2%          | Of which to: | Asia            | 51.0%  |
|           | Skimmed milk powder                         | 27.0%          |              | Africa          | 19.1%  |
|           | Whole and semi-skimmed milk powder          | 12.9%          |              | Rest of Europe  | 12.2%  |
|           | Concentrated milk (liquid)                  | 9.4%           |              | Central America | 6.8%   |
|           | Whey products and milk protein concentrates | 4.4%           |              | North America   | 6.2%   |
|           | Fermented dairy products                    | 2.5%           |              | South America   | 2.5%   |
|           | Lactose and milk sugar syrup                | 1.6%           |              | Oceania         | 2.0%   |
|           | Milk and cream                              | 1.2%           |              | Other           | 0.2%   |
|           | Butter and butter oil                       | 0.9%           |              |                 |        |
|           | Total                                       | 100.0%         |              | Total           | 100.0% |

Source: Eurostat, ZuivelNL

TRADE BALANCE 2025

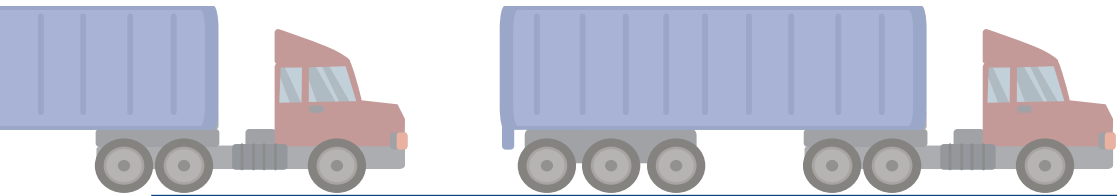


IMPORTS OF MILK AND MILK PRODUCTS<sup>4</sup> BY THE UNITED STATES



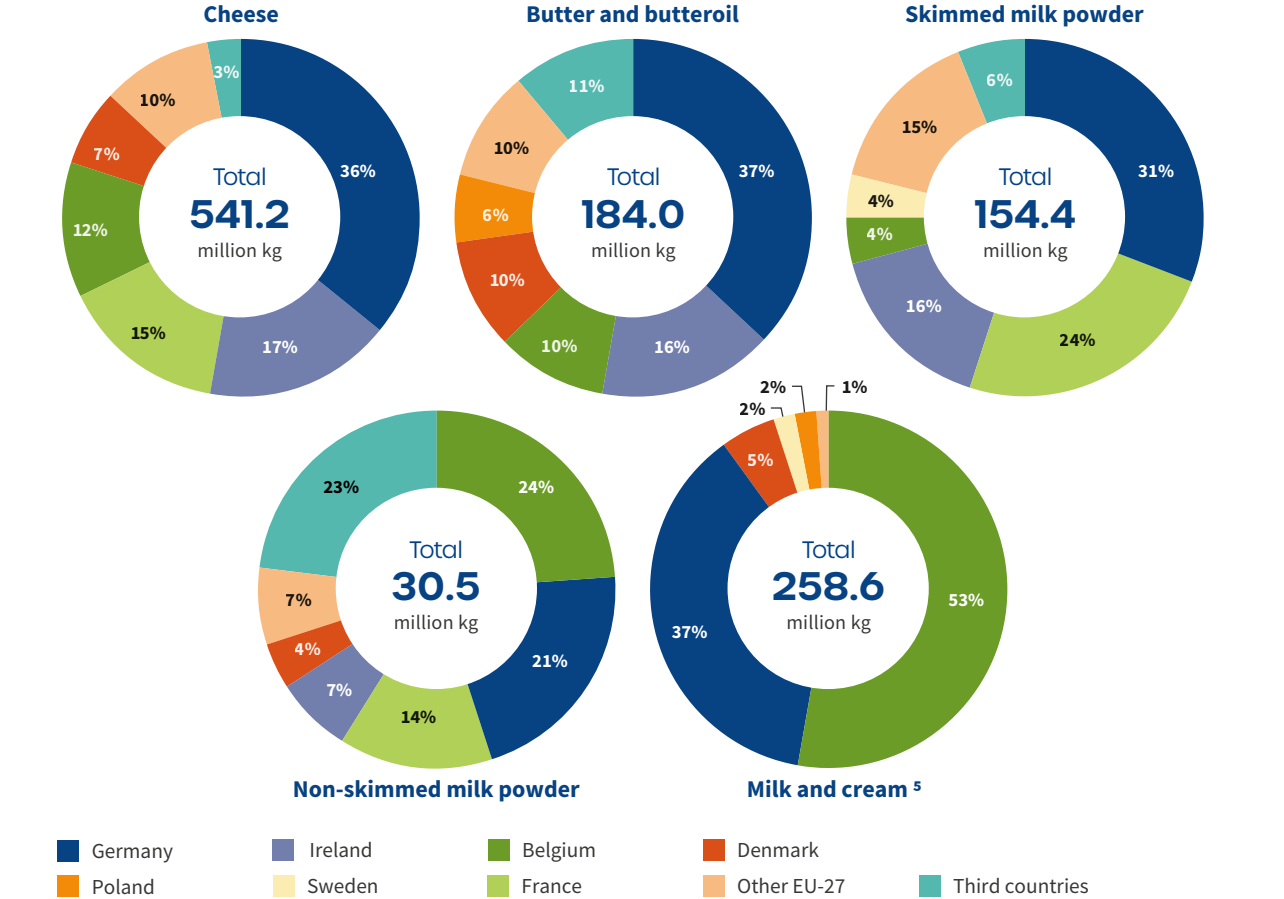
<sup>4</sup> Cheese, butter and butteroil, fermented milk products, concentrated milk, milk and cream, whey and whey products and products with milk constituents (HS-codes 0401-0406 and 17021).

Source: U.S. Census Bureau



DUTCH IMPORTS OF SELECTED PRODUCT GROUPS IN 2025

Million kg, including intra-EU trade

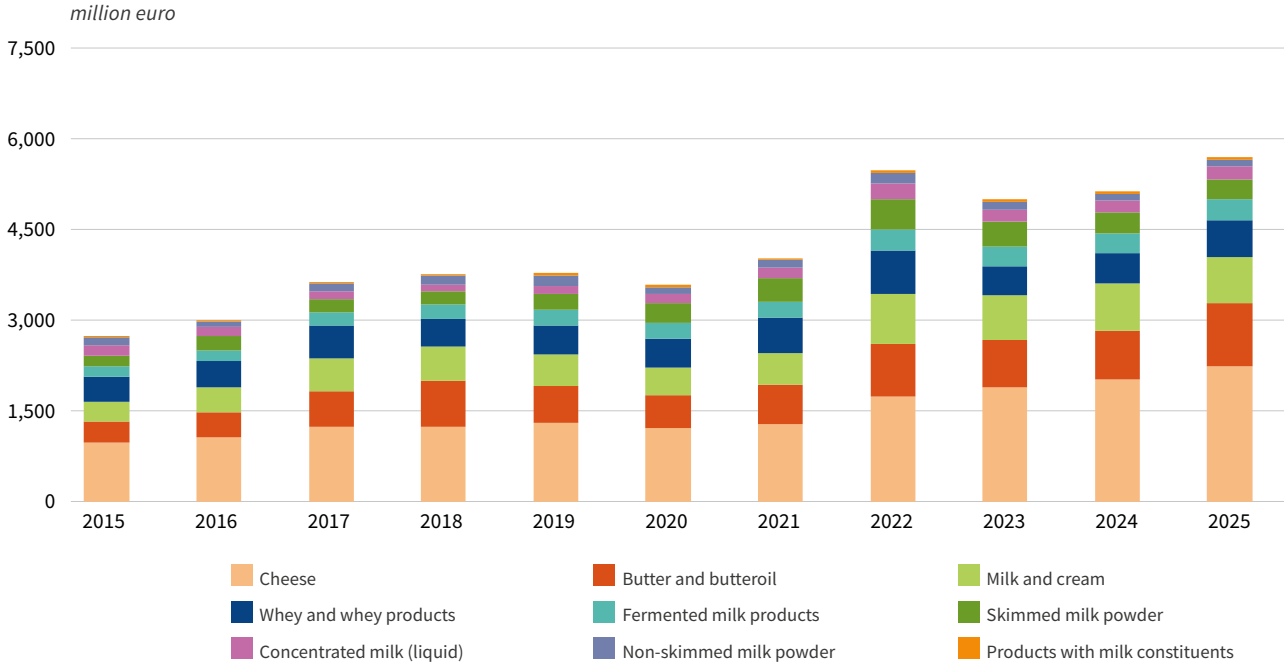


<sup>5</sup> In small packages for consumers.

Source: Eurostat, ZuivelNL

DEVELOPMENT DUTCH IMPORTS

By product group euro, including intra-EU trade



Source: Eurostat, ZuivelNL

# Consumption

The Netherlands has a long tradition of dairy consumption. Milk, cheese, yoghurt and dairy desserts are part of the daily diet of many Dutch people. Semi-skimmed and skimmed milk, yoghurt and

cheeses labelled as 20+ and 30+ are included in the Netherlands Nutrition Centre’s ‘the Wheel of Five’, its equivalent to the food pyramid. This is a nationally recognised information model to promote healthy, safe and more sustainable food choices.

The National Institute for Public Health and the Environment (RIVM) monitors the dietary habits of approximately 3,500 children and adults through the Food Consumption Survey (VCP). The VCP provides insights into what, where and when Dutch people eat and drink and assesses these dietary patterns against the dietary guidelines issued by the Health Council of the Netherlands. According to the latest survey,

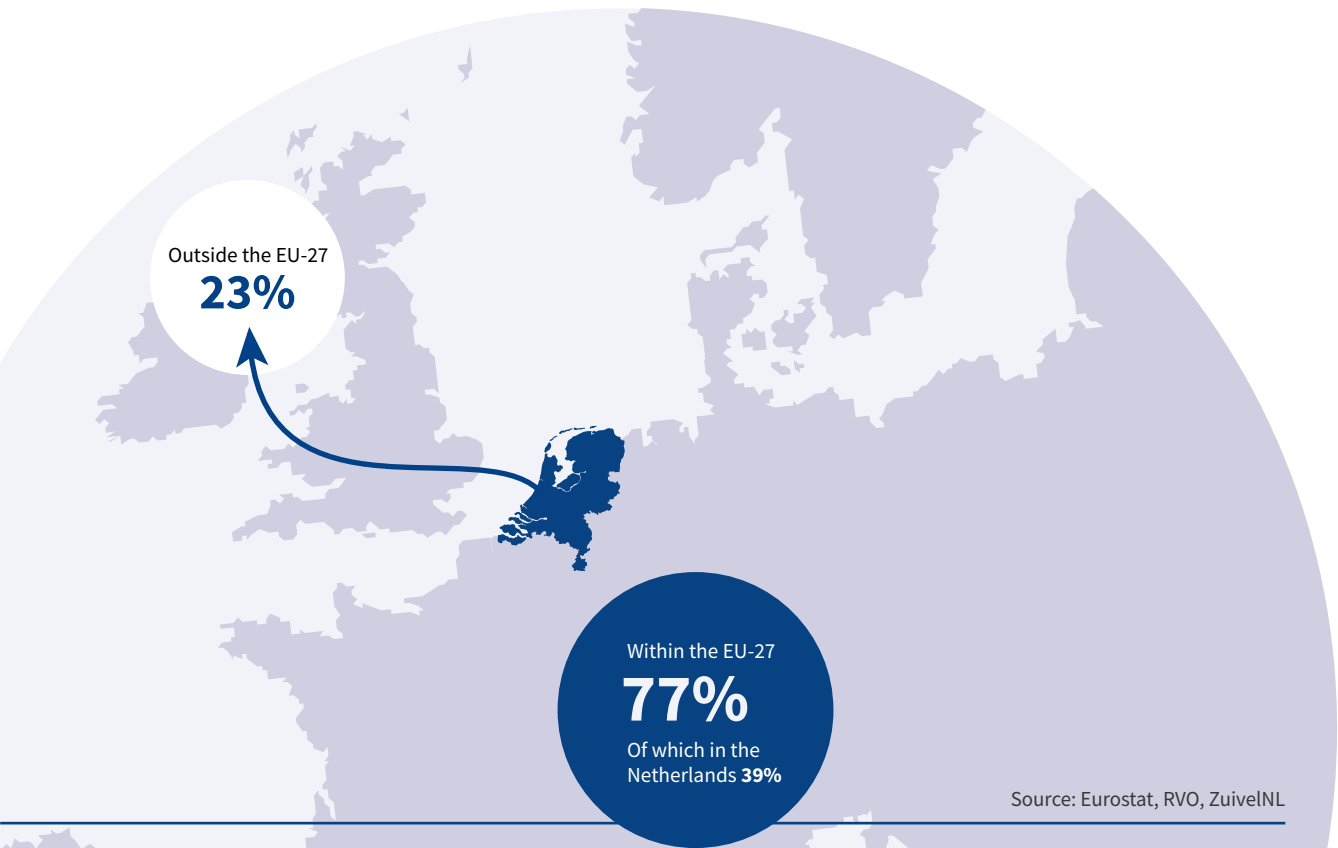
covering the period 2019 - 2021, the average Dutch person consumes 338 grams of dairy products daily. Milk and milk-based drinks, yoghurt and cheese (including cottage cheese) are the main categories, accounting for 180 grams, 70 grams and 49 grams per day, respectively.

Cheese is an important component of Dutch dairy consumption. Dutch per capita cheese consumption has been above the European average for many years. Per capita cheese consumption, including cottage cheese and goat’s cheese, is approximately 25 kg.

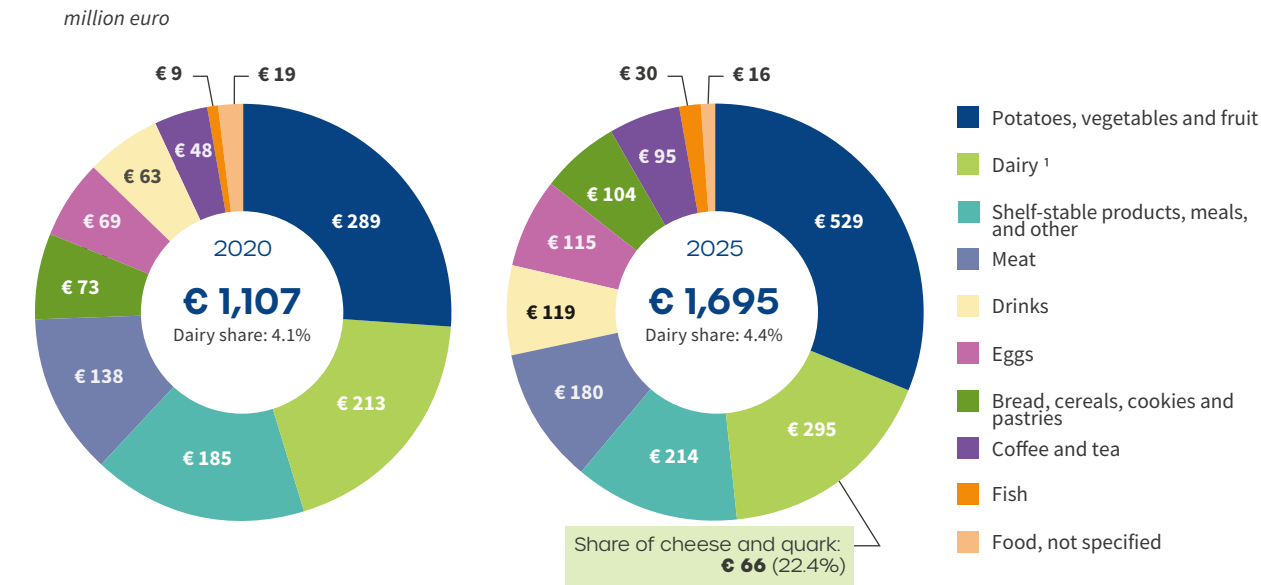
Of the dairy available in the Netherlands (expressed in milk equivalents), which comprise domestic milk production and imports, approximately 30% is consumed on the domestic market. The remaining 70% is exported, with the majority destined for other EU countries, particularly neighbouring countries.

## DESTINATION OF AVAILABLE DAIRY PRODUCTS IN THE NETHERLANDS

Based on production, imports and exports (in % milk equivalent)



## CONSUMER SPENDING ON ORGANICALLY CERTIFIED FOOD IN SUPERMARKETS BY PRODUCT GROUP



<sup>1</sup> Including margarine and other vegetable fats.

Source: CBS, Wageningen University & Research

## CHEESE CONSUMPTION IN SELECTED COUNTRIES

|                       | million kg   |              |              | Per capita consumption (kg) |             |             |
|-----------------------|--------------|--------------|--------------|-----------------------------|-------------|-------------|
|                       | 2015         | 2020         | 2024         | 2015                        | 2020        | 2024        |
| <b>EU-27</b>          | <b>8,599</b> | <b>9,077</b> | <b>9,688</b> | <b>19.4</b>                 | <b>20.3</b> | <b>21.5</b> |
| Germany               | 2,000        | 2,102        | 2,119        | 24.4                        | 25.1        | 25.1        |
| France                | 1,689        | 1,708        | 1,852        | 26.0                        | 25.9        | 27.8        |
| Italy                 | 1,163        | 1,160        | 1,169        | 19.2                        | 19.4        | 19.7        |
| Poland                | 660          | 708          | 821          | 17.2                        | 18.5        | 21.3        |
| Spain                 | 614          | 650          | 819          | 13.2                        | 13.6        | 17.1        |
| Netherlands           | 395          | 467          | 443          | 23.3                        | 26.8        | 24.6        |
| <b>United States</b>  | <b>5,148</b> | <b>5,744</b> | <b>6,149</b> | <b>15.8</b>                 | <b>16.9</b> | <b>17.8</b> |
| <b>Russia</b>         | <b>1,041</b> | <b>1,338</b> | <b>1,485</b> | <b>7.2</b>                  | <b>9.1</b>  | <b>10.3</b> |
| <b>Brazil</b>         | <b>819</b>   | <b>1,090</b> | <b>1,189</b> | <b>4.1</b>                  | <b>5.2</b>  | <b>5.6</b>  |
| <b>Türkiye</b>        | <b>635</b>   | <b>723</b>   | <b>808</b>   | <b>7.9</b>                  | <b>8.4</b>  | <b>9.2</b>  |
| <b>Mexico</b>         | <b>476</b>   | <b>618</b>   | <b>772</b>   | <b>3.9</b>                  | <b>4.9</b>  | <b>5.9</b>  |
| <b>United Kingdom</b> | <b>777</b>   | <b>797</b>   | <b>745</b>   | <b>11.9</b>                 | <b>11.8</b> | <b>10.8</b> |
| <b>Egypt</b>          | <b>392</b>   | <b>536</b>   | <b>624</b>   | <b>3.9</b>                  | <b>4.9</b>  | <b>5.4</b>  |
| <b>Canada</b>         | <b>455</b>   | <b>529</b>   | <b>551</b>   | <b>12.6</b>                 | <b>13.9</b> | <b>13.9</b> |

Source: IDF World Dairy Situation 2025, ZuivelNL

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