Overview of the use of unprocessed milk in dairy products for the first six months of 2026

This report was compiled by the Economic Desk of the MPO as part of the Economies and Markets project of Milk SA. A market economy is dependent on available information, evenly distributed between role players, that enables the “invisible hand” to optimally distribute production factors. The better the information, the more optimally the invisible hand can function. The objective of Milk SA and the Economic Desk of the MPO is to provide market signals and market trends to the dairy industry, organised agriculture, and policymakers, to enhance the functioning of the value chain.

The Economic Desk of the MPO produces several reports, some as part of the Economies and Markets project of Milk SA and others as an independent market contributor focusing on supply and demand variables and dynamics, both within an international and domestic ambit. These reports embody the Industry Information Project of the MPO. The Desk follows an approach where the market analysis is objective with a strong scientific foundation.

The outputs and deliberations of the Desk should assist role players in the value chain to better prepare for market developments and empower role players to engage at a higher level. This information should not be regarded as financial advice. While this report is compiled from sources that are deemed reliable, Milk SA and the MPO cannot take responsibility for any decisions based on the information in this report.

Synopsis of the allocation of unprocessed milk in dairy products and the production of byproducts

- The allocation of unprocessed milk used in dairy products and the production of byproducts *(whey and butter)* for the first and second quarter of 2026 was compared with the same period in 2025, as shown in Table 1.

- A comparison between the first six months of 2026 and the same period last year indicates that the most notable percentage shifts in the utilisation of unprocessed milk across dairy products occurred in long-life and sterilised milk (+12.98%) and in full cream milk powder (-22.82%).

- On a mass basis, these shifts in unprocessed milk allocation were +53 673 697 kg more allocated towards long-life and sterilised milk, and -18 986 450 kg less allocated towards FMP.

- Butter and whey powder manufacturing decreased by 2.27% and 11.00%, respectively, from the first half of 2025 to the first half of 2026.

- The allocation of unprocessed milk towards fresh milk (-8.23%), fermented products (-2.07%) and other liquid products (-3.61%) has decreased compared to the first six months of 2025.

- The cumulative use of unprocessed milk in liquid dairy products increased by 3.27%, while the cumulative use of unprocessed milk in concentrated products decreased by 3.85%.

- Overall, despite these shifts, the total amount of unprocessed milk used in dairy products for January to June 2026 remained relatively unchanged compared to the same period last year (-0.49%), but the allocation to the different dairy products has changed.

- Figures 1 and 2 illustrate the total unprocessed milk used in dairy products and the production of byproducts. Long-life milk and cheese (excluding cottage and cream cheese) represent the bulk usage of unprocessed milk, followed by fresh milk and fermented products.

- Figures 3 to 11 graphically display the amount of unprocessed milk used for each dairy product. Steady volumes of unprocessed milk used in cheese, excluding cottage and cream cheese, during every first and second quarters from 2022 to 2026 are notably different from the more volatile volumes of unprocessed milk allocated towards some other dairy products.

- Figures 12 and 13 display the production of byproducts.

Table 1 presents the allocation of unprocessed milk to the various dairy product categories, compared with the corresponding period over the previous four years. During the first six months of 2026, several shifts in product allocation were evident. The quantity of unprocessed milk used for full cream milk powder (FMP) production declined by 22.82%, while allocations to whey powder and butter production decreased by 11.00% and 2.27%, respectively.

In the liquid market, the strongest growth was recorded in long-life and sterilised milk (+12.98%) and sweetened, flavoured and coloured milk (+9.47%), both of which received larger volumes of raw milk. Despite these changes in the distribution of milk between product categories, the total volume of unprocessed milk processed into dairy products remained relatively stable, decreasing by only 0.49% compared with the corresponding period in 2025. This indicates that, while overall milk processing volumes changed very little, processors adjusted the distribution of raw milk across product categories to align with changing market demand and production requirements.

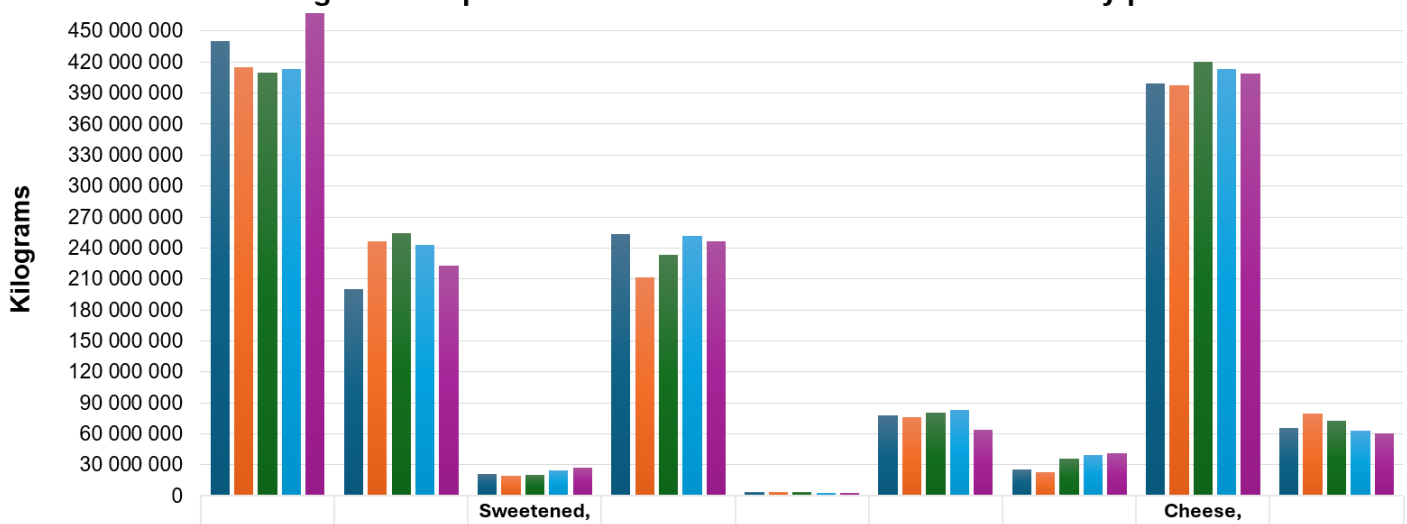
Table 1: Cumulative use of unprocessed milk in dairy products

Product/Period	Kg unprocessed milk used					% Change 2026 to 2025	Change in mass. 2026 to 2025
	Jan-Jun 2022	Jan-Jun 2023	Jan-Jun 2024	Jan-Jun 2025	Jan-Jun 2026		
Long life & sterilized milk	440 374 756	415 161 623	409 713 736	413 435 680	467 109 376	**12,98%**	**53 673 697**
Fresh milk	200 309 556	246 323 164	253 957 222	243 332 716	223 307 916	**-8,23%**	**-20 024 801**
Sweetened, flavoured and coloured milk	21 448 430	19 158 815	20 684 874	24 864 856	27 220 223	**9,47%**	**2 355 367**
Fermented products	253 765 802	211 151 764	233 190 205	252 041 386	246 816 439	**-2,07%**	**-5 224 947**
Other liquid products	3 450 692	4 188 825	3 817 181	3 307 618	3 188 100	**-3,61%**	**-119 518**
FMP	77 616 522	76 134 892	80 235 507	83 217 875	64 231 425	**-22,82%**	**-18 986 450**
SMP	25 564 975	23 348 890	35 674 555	39 266 250	41 662 655	**6,10%**	**2 396 404**
Cheese, excl. cottage and cream cheese	399 432 528	397 813 792	420 080 013	413 150 580	408 949 156	**-1,02%**	**-4 201 424**
Other concentrated products	65 563 144	79 587 667	72 526 446	62 844 735	60 573 897	**-3,61%**	**-2 270 838**
Total kg of unprocessed milk used in dairy products	**1 487 526 405**	**1 472 869 431**	**1 529 879 739**	**1 535 461 695**	**1 543 059 186**	**0,49%**	**7 597 491**
Total unprocessed milk used in liquid products	919 349 236	895 984 191	921 363 219	936 982 255	967 642 054	**3,27%**	**30 659 798**
Total unprocessed milk used in concentrated products	568 177 169	576 885 240	608 516 520	598 479 440	575 417 132	**-3,85%**	**-23 062 307**
Dairy market for liquid products %	**61,80%**	**60,83%**	**60,22%**	**61,02%**	**62,71%**	**2,76%**	
Dairy market for concentrated products %	**38,20%**	**39,17%**	**39,78%**	**38,98%**	**37,29%**	**-4,33%**	
Whey powder	8 303 065	9 655 241	11 146 933	11 830 479	10 529 387	**-11,00%**	**-1 301 092**
Butter	8 736 206	9 786 183	10 653 244	12 798 863	12 508 040	**-2,27%**	**-290 823**

(Source: Milk SA) Last two months are preliminary.
Other liquid products: including cream, ice cream, fruit and other liquid blends and dairy snacks.
Other concentrated products: including cottage cheese, cream cheese, condensed milk, evaporated milk, desserts and powder blends.

Figures 1 and 2 are a graphical display of the unprocessed milk allocation to dairy products, including the byproducts manufactured from dairy products. The graphical display illustrates that most of the unprocessed milk was used in long-life milk and cheese (excluding cottage and cream cheese).

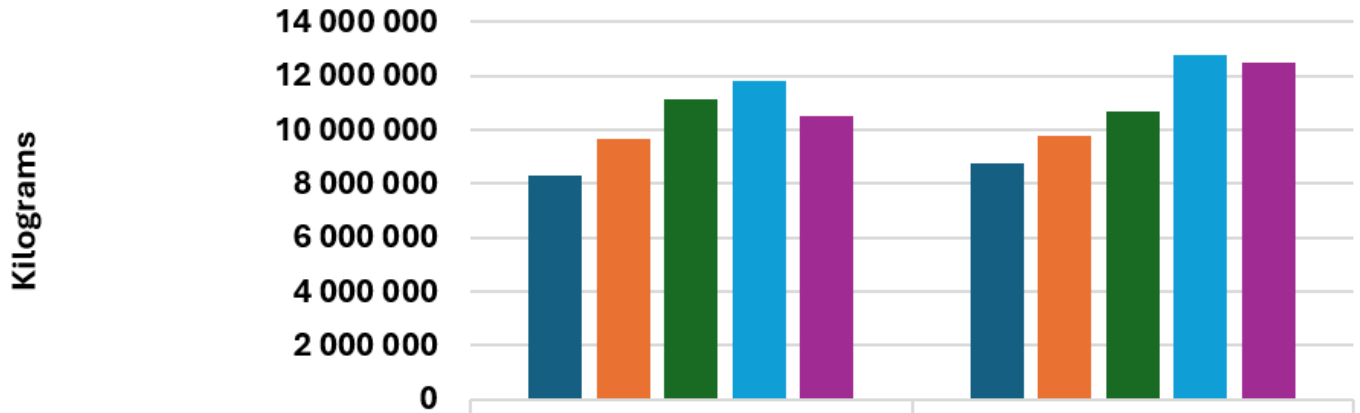
Figure 1: Unprocessed milk allocated to the different dairy products



	Long life & sterilized milk	Fresh milk	Sweetened, flavoured and coloured milk	Fermented products	Other liquid products	FMP	SMP	Cheese, excl cottage and cream cheese	Other concentrated products
Jan-Jun 2022	440 374 756	200 309 556	21 448 430	253 765 802	3 450 692	77 616 522	25 564 975	399 432 528	65 563 144
Jan-Jun 2023	415 161 623	246 323 164	19 158 815	211 151 764	4 188 825	76 134 892	23 348 890	397 813 792	79 587 667
Jan-Jun 2024	409 713 736	253 957 222	20 684 874	233 190 205	3 817 181	80 235 507	35 674 555	420 080 013	72 526 446
Jan-Jun 2025	413 435 680	243 332 716	24 864 856	252 041 386	3 307 618	83 217 875	39 266 250	413 150 580	62 844 735
Jan-Jun 2026	467 109 376	223 307 916	27 220 223	246 816 439	3 188 100	64 231 425	41 662 655	408 949 156	60 573 897

(Source: Milk SA)

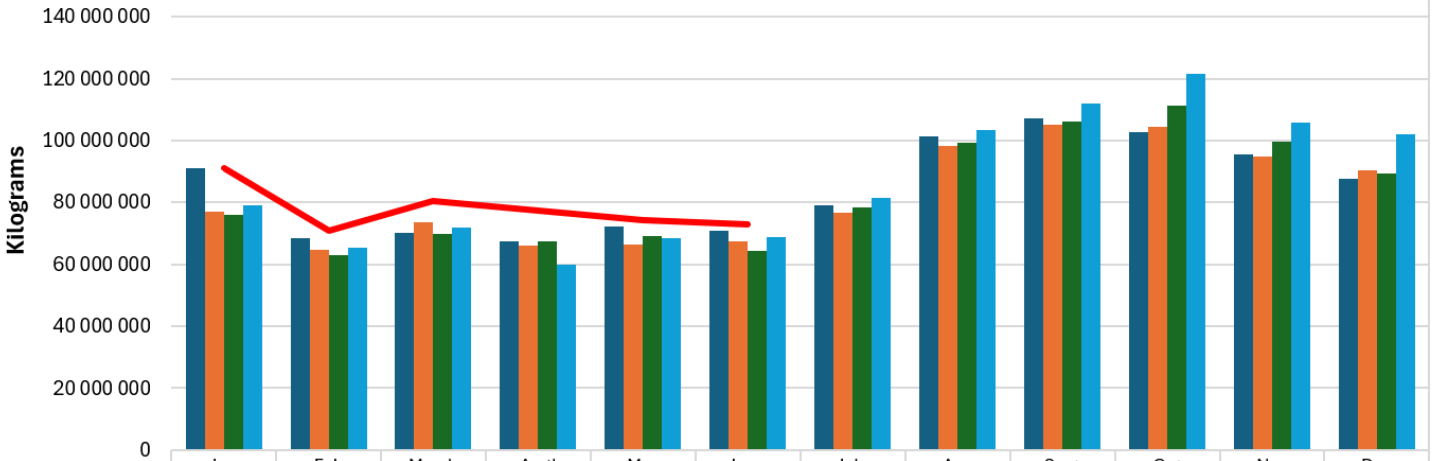
Figure 2: Total whey powder and butter manufactured (Kg)



	Whey powder	Butter
Jan-Jun 2022 Kg produced	8 303 065	8 736 206
Jan-Jun 2023 Kg prouced	9 655 241	9 786 183
Jan-Jun 2024 Kg produced	11 146 933	10 653 244
Jan-Jun 2025 Kg produced	11 830 479	12 798 863
Jan-Jun 2026 Kg produced	10 529 387	12 508 040

(Source: Milk SA)

Figure 3: Total unprocessed milk used in long-life & sterilised milk (Kg000)

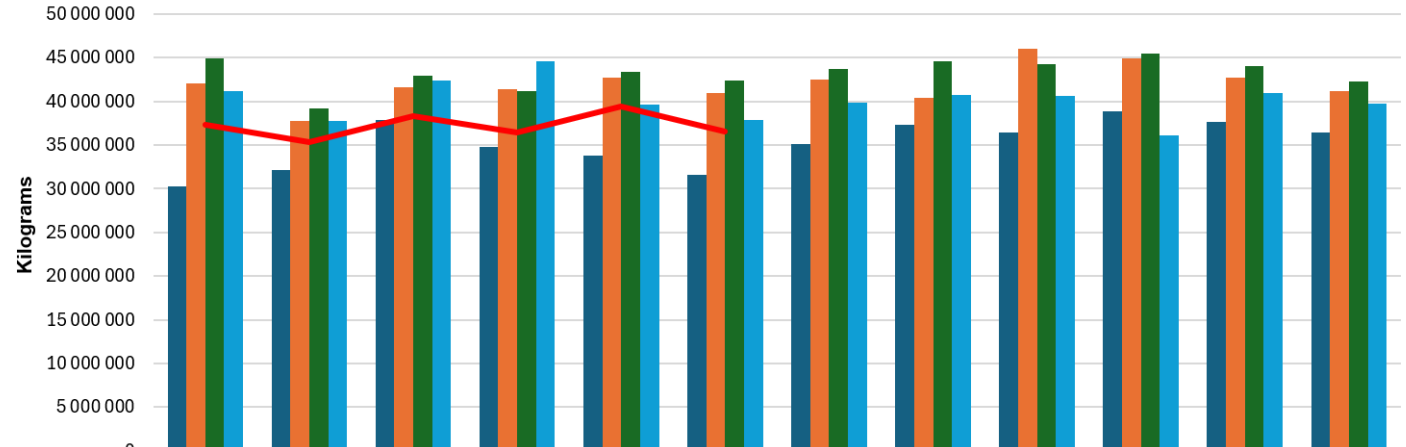


	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
2022	91 029 677	68 514 405	70 257 178	67 454 450	72 350 820	70 768 226	78 937 206	101 502 72	107 135 09	102 664 90	95 453 428	87 610 672
2023	76 876 167	64 631 237	73 588 690	66 200 917	66 328 644	67 535 968	76 830 449	98 263 859	105 241 98	104 425 35	94 749 489	90 337 265
2024	75 912 605	63 031 628	69 985 873	67 541 593	68 975 226	64 266 813	78 456 748	99 316 571	106 254 80	111 440 69	99 601 117	89 493 098
2025	79 088 550	65 212 513	71 881 803	59 844 863	68 451 075	68 956 874	81 440 987	103 554 65	111 816 59	121 606 83	105 957 53	101 969 57
2026	91 088 892	70 798 097	80 382 684	77 530 505	74 375 499	72 933 699						

(Source: Milk SA)

Figure 3 shows the amount of unprocessed milk used in long-life and sterilised milk. In the first half of 2026, compared with the same period last year, more unprocessed milk was used to produce long-life and sterilised milk in every month of 2026 so far, resulting in a 12.98% increase in unprocessed milk allocated for long-life and sterilised milk. This might have been a result of the FMD pushing more milk towards UHT milk processing.

Figure 4: Total unprocessed milk used in fresh milk (Kg000)

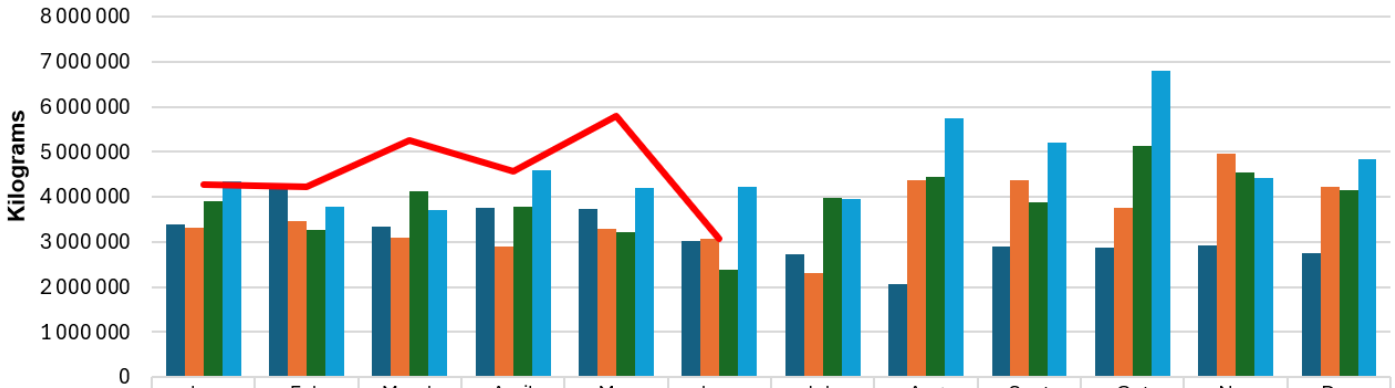


	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
2022	30 303 384	32 116 626	37 835 939	34 731 556	33 754 532	31 567 519	35 089 893	37 337 136	36 467 539	38 840 783	37 611 271	36 393 174
2023	42 044 524	37 712 035	41 568 527	41 351 386	42 705 211	40 941 481	42 494 912	40 431 896	46 045 440	44 928 239	42 668 575	41 137 764
2024	44 928 394	39 200 994	42 923 622	41 197 551	43 340 525	42 366 135	43 651 576	44 607 574	44 294 665	45 516 142	44 053 929	42 307 413
2025	41 160 102	37 718 254	42 337 460	44 572 890	39 641 672	37 902 338	39 883 958	40 773 309	40 627 271	36 098 043	40 982 308	39 742 345
2026	37 261 486	35 345 671	38 319 714	36 410 350	39 423 103	36 547 592						

(Source: Milk SA)

Figure 4 contains the data of unprocessed milk used in fresh milk. From January to June 2026, compared with the same period last year, less unprocessed milk was used to produce fresh milk, resulting in an 8.23% decrease in unprocessed milk used for fresh milk.

Figure 5: Total unprocessed milk used in sweetened, flavoured and coloured milk (Kg'000)

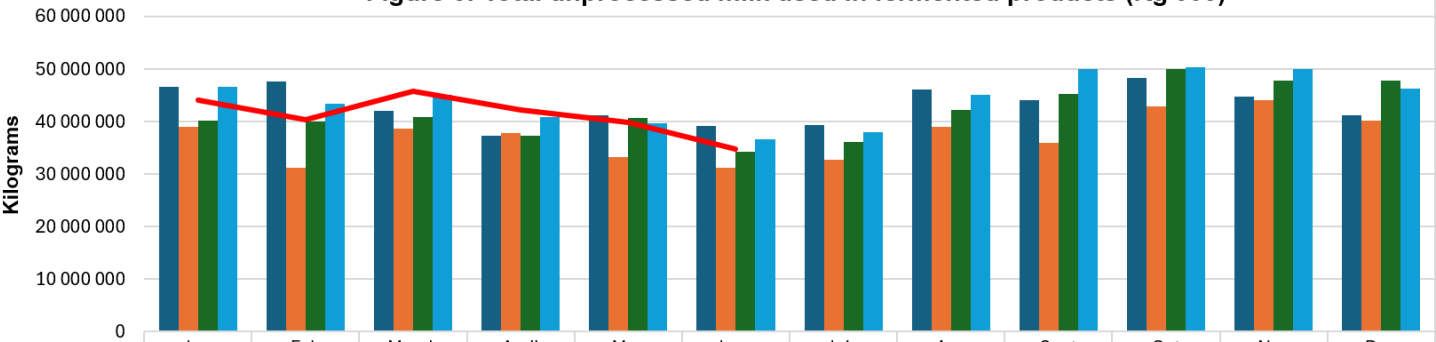


	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
2022	3 380 347	4 188 117	3 352 832	3 754 414	3 739 868	3 032 852	2 726 454	2 072 343	2 895 063	2 882 346	2 934 390	2 759 082
2023	3 307 676	3 469 161	3 107 235	2 903 666	3 303 613	3 067 463	2 312 041	4 384 190	4 383 811	3 758 425	4 955 472	4 234 423
2024	3 916 156	3 273 446	4 130 419	3 776 106	3 215 278	2 373 469	3 983 509	4 441 335	3 872 025	5 126 144	4 548 360	4 156 031
2025	4 346 671	3 787 435	3 700 521	4 603 990	4 212 558	4 213 681	3 950 395	5 742 084	5 213 954	6 791 401	4 416 620	4 848 796
2026	4 282 700	4 228 891	5 265 057	4 580 541	5 790 421	3 072 613						

(Source: Milk SA)

Figure 5 illustrates the volume of unprocessed milk allocated to the production of sweetened, flavoured and coloured milk. Noticeable increases were recorded during March and May, followed by a sharp decline in June. On a cumulative basis, the volume of unprocessed milk used to produce sweetened, flavoured and coloured milk during the first six months of 2026 was 9.5% higher than during the corresponding period in 2025.

Figure 6: Total unprocessed milk used in fermented products (Kg'000)

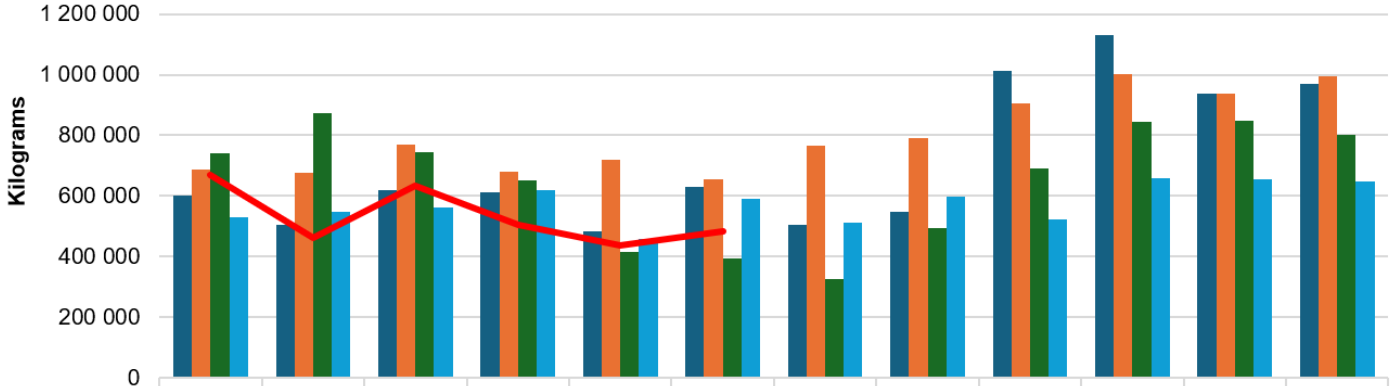


	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
2022	46 547 096	47 646 576	41 979 916	37 226 148	41 224 690	39 141 374	39 392 881	46 022 995	44 037 071	48 229 783	44 657 754	41 142 543
2023	39 031 547	31 110 373	38 693 167	37 822 519	33 278 732	31 215 427	32 731 894	39 034 542	35 925 415	42 844 886	44 075 250	40 131 306
2024	40 156 789	39 974 570	40 890 203	37 329 467	40 626 065	34 213 112	36 025 953	42 113 140	45 243 726	49 952 304	47 812 153	47 809 876
2025	46 594 944	43 359 998	45 036 810	40 835 156	39 641 429	36 573 048	38 033 782	44 986 132	49 947 927	50 314 148	49 907 842	46 266 823
2026	43 968 657	40 270 651	45 821 785	42 189 143	39 775 797	34 790 405						

(Source: Milk SA)

Figure 6 contains the data on unprocessed milk used in fermented products. In the second quarter of 2026, compared with the same period last year, the amount of unprocessed milk used to produce fermented products declined. For the first six months of the year, 2.07% less unprocessed milk was used to produce fermented products, compared to the same period in 2025.

Figure 7: Total unprocessed milk used in other liquid products (Kg)



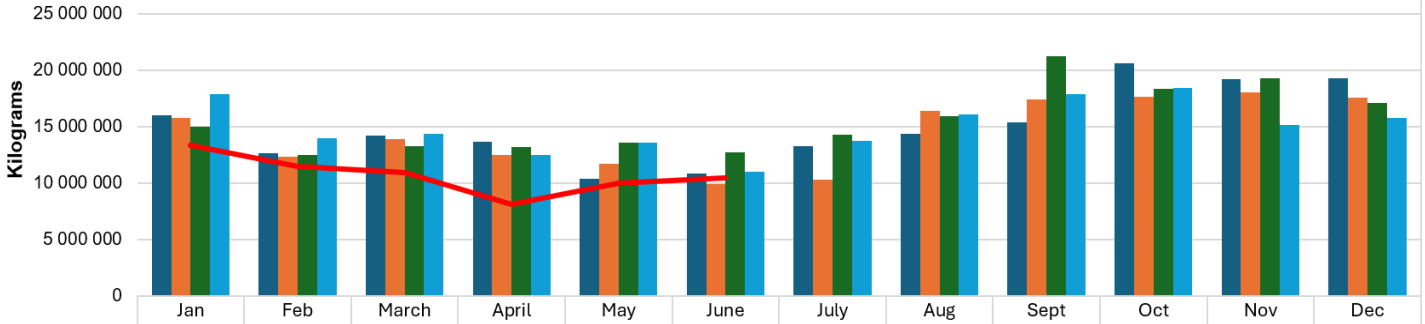
	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
2022	602 042	504 745	620 800	610 861	484 110	628 134	503 032	546 591	1 011 97	1 131 89	936 015	971 356
2023	686 890	677 731	771 118	678 816	720 223	654 046	766 716	791 758	905 325	1 001 43	936 623	996 622
2024	739 916	872 496	745 203	651 778	415 338	392 451	326 143	493 138	691 245	845 686	847 104	802 694
2025	529 479	548 377	562 146	620 361	458 035	589 219	513 202	597 925	522 050	659 575	654 938	647 286
2026	668 653	461 672	632 129	506 233	436 350	483 062						

(Source: Milk SA). Other liquid products: including cream, ice cream, fruit and other liquid blends and dairy snacks.

Figure 7 above shows the amount of unprocessed milk used in other liquid dairy products. During April, May and June, less unprocessed milk was used in other liquid products compared to the corresponding months in 2025. Cumulatively, from January to June 2026, 3.61% less unprocessed milk was used in other liquid dairy products.

Figures 8 and 9 show the amount of unprocessed milk used in full cream milk powder (FMP) and skimmed milk powder (SMP). In the first half of 2026, compared with the same period last year, less unprocessed milk was used to produce FMP across all six months of 2026, resulting in a 22.82% decrease in unprocessed milk used for FMP production.

Figure 8: Total unprocessed milk used in FMP (Kg000)

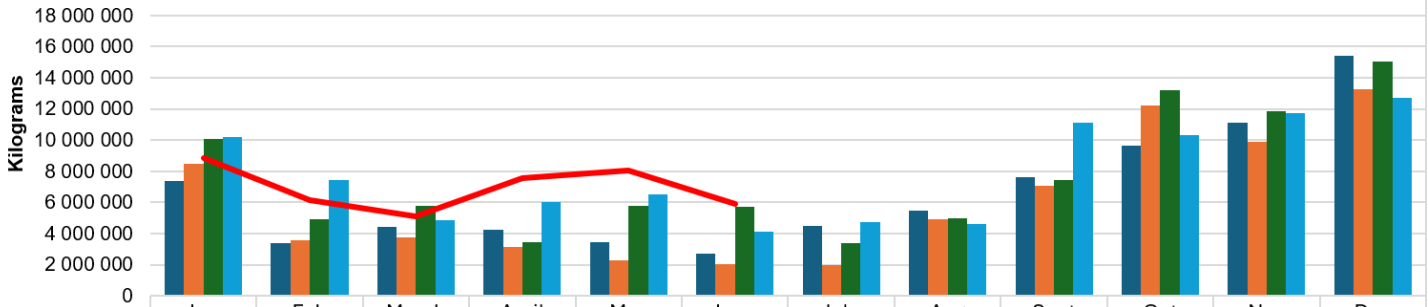


	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
2022	15 973 645	12 619 572	14 177 240	13 620 643	10 384 536	10 840 885	13 284 087	14 332 196	15 345 160	20 616 425	19 194 063	19 254 780
2023	15 794 606	12 353 774	13 902 227	12 447 197	11 711 568	9 925 521	10 323 491	16 363 686	17 371 246	17 654 571	18 042 631	17 589 174
2024	14 997 598	12 463 836	13 276 969	13 190 293	13 556 256	12 750 556	14 236 135	15 926 599	21 249 557	18 302 015	19 294 089	17 098 662
2025	17 840 504	13 996 491	14 360 513	12 460 029	13 586 359	10 973 979	13 728 675	16 052 696	17 874 579	18 438 789	15 170 384	15 733 141
2026	13 328 288	11 443 969	10 917 714	8 127 376	9 945 452	10 468 626						

(Source: Milk SA)

In contrast with FMP, 6.10% more unprocessed milk was used in the production of SMP during the first six months of 2026 compared to the corresponding period of 2025 (Figure 9).

Figure 9: Total unprocessed milk used in SMP (Kg000)

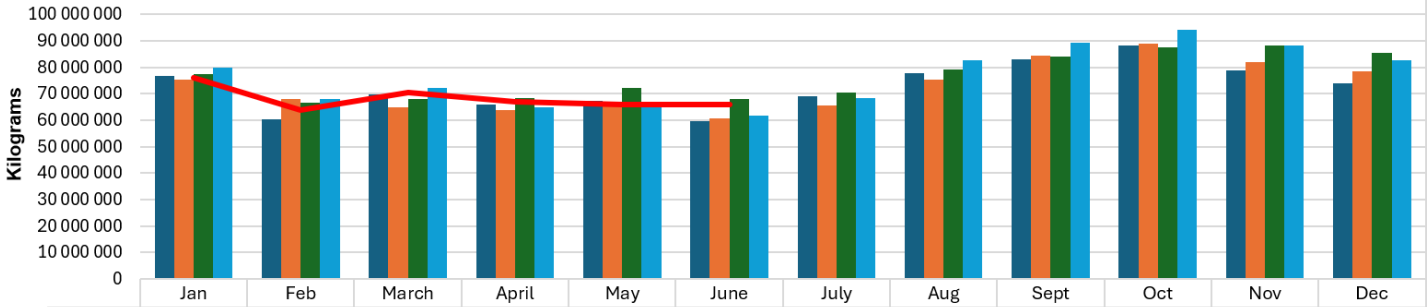


	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
2022	7 360 084	3 381 400	4 439 346	4 227 356	3 423 139	2 733 649	4 473 888	5 458 222	7 609 369	9 677 666	11 131 39	15 411 42
2023	8 502 167	3 583 939	3 762 090	3 146 532	2 286 965	2 067 196	1 982 692	4 954 539	7 041 772	12 228 02	9 887 547	13 257 64
2024	10 078 75	4 897 135	5 782 661	3 433 464	5 763 844	5 718 699	3 413 440	4 972 922	7 436 189	13 199 42	11 865 34	15 033 41
2025	10 230 28	7 456 307	4 843 299	6 043 870	6 534 719	4 157 775	4 740 238	4 640 949	11 140 75	10 314 40	11 710 78	12 706 77
2026	8 874 978	6 156 054	5 084 352	7 556 868	8 083 554	5 906 850						

(Source: Milk SA)

Figure 10 contains the figures on unprocessed milk used in cheese production. For the first six months of 2026, 1.02% less unprocessed milk was used to produce cheese. The minimal change in the volume of unprocessed milk flow towards cheese is notable and in contrast to the volatility in volumes of unprocessed milk allocated towards some of the other dairy products.

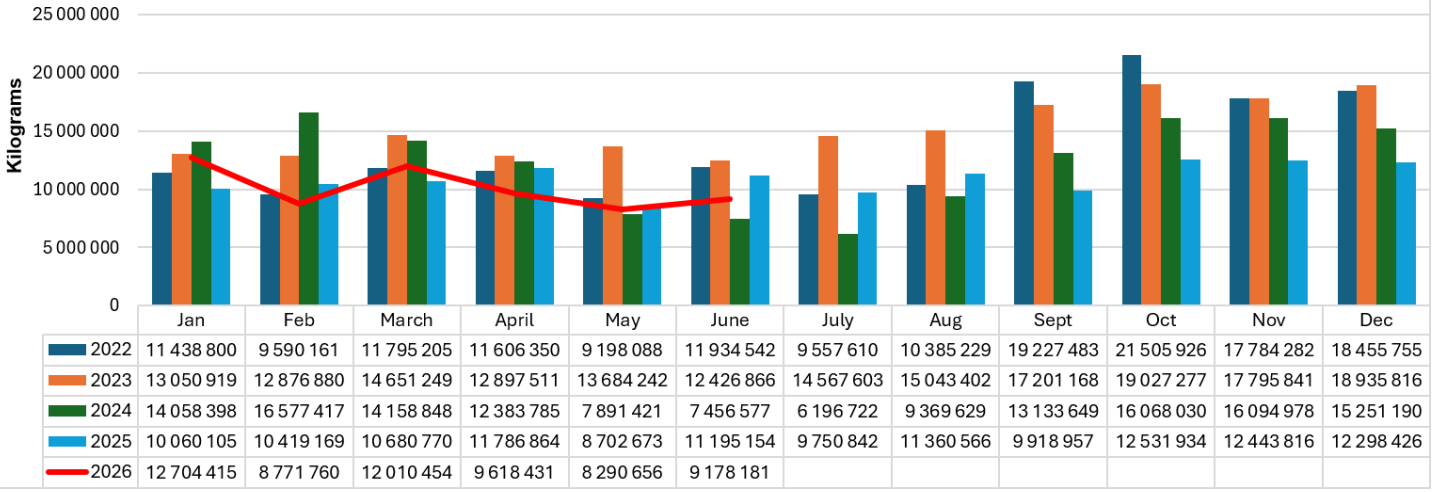
Figure 10: Total unprocessed milk used in cheese, excl. cottage and cream (Kg 000)



	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
2022	76 671 534	60 320 504	69 852 527	65 914 870	67 165 339	59 507 753	69 085 087	77 773 983	83 159 074	88 155 526	78 857 796	73 975 005
2023	75 345 918	67 852 223	65 007 408	63 850 042	65 104 699	60 653 502	65 407 163	75 295 157	84 334 613	88 849 054	81 862 435	78 288 078
2024	77 302 075	66 517 947	67 894 334	68 285 176	72 153 578	67 926 903	70 300 927	79 295 520	84 006 220	87 486 393	88 180 051	85 435 472
2025	79 926 883	67 849 624	72 246 978	64 966 426	66 500 426	61 660 242	68 243 660	82 560 643	89 246 198	94 024 346	88 303 665	82 765 449
2026	75952 038	63894 279	70502 641	66820 641	65992 452	65787 105						

(Source: Milk SA)

Figure 11: Total unprocessed milk used in other concentrated products (Kg 000)



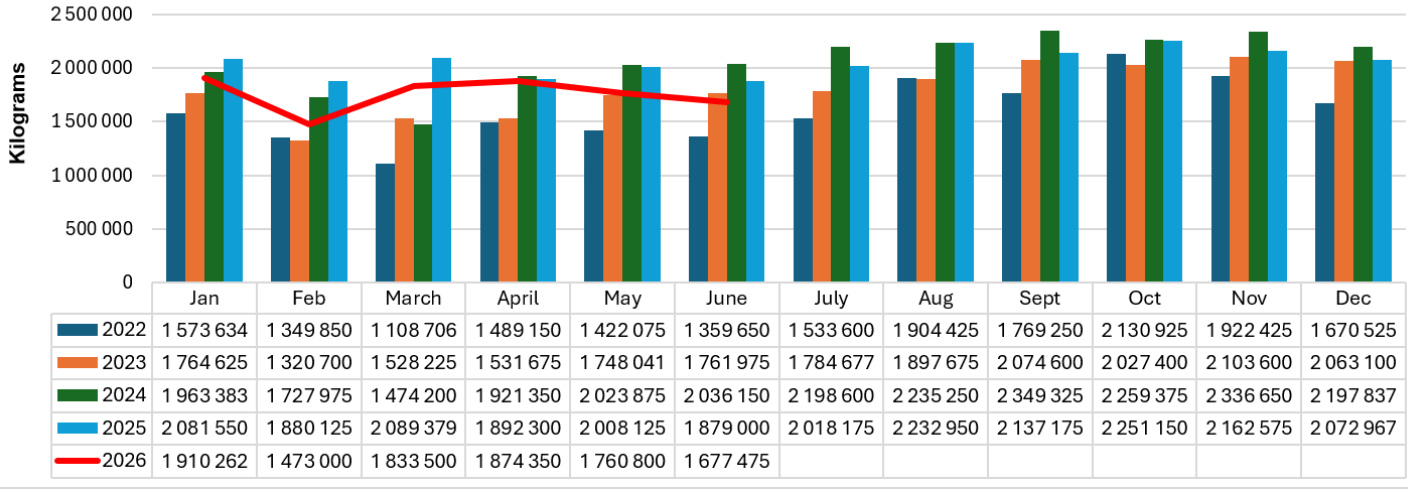
	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
2022	11 438 800	9 590 161	11 795 205	11 606 350	9 198 088	11 934 542	9 557 610	10 385 229	19 227 483	21 505 926	17 784 282	18 455 755
2023	13 050 919	12 876 880	14 651 249	12 897 511	13 684 242	12 426 866	14 567 603	15 043 402	17 201 168	19 027 277	17 795 841	18 935 816
2024	14 058 398	16 577 417	14 158 848	12 383 785	7 891 421	7 456 577	6 196 722	9 369 629	13 133 649	16 068 030	16 094 978	15 251 190
2025	10 060 105	10 419 169	10 680 770	11 786 864	8 702 673	11 195 154	9 750 842	11 360 566	9 918 957	12 531 934	12 443 816	12 298 426
2026	12 704 415	8 771 760	12 010 454	9 618 431	8 290 656	9 178 181						

(**Source: Milk SA**)

Other concentrated products: including cottage cheese, cream cheese, condensed milk, evaporated milk, desserts and powder blends.

Figure 11 illustrates the amount of unprocessed milk used in other concentrated products. During the first half of 2026, compared with the same period last year, less unprocessed milk was used to produce other concentrated dairy products (-3.61%).

Figure 12: Total whey powder manufactured (Kg 000)

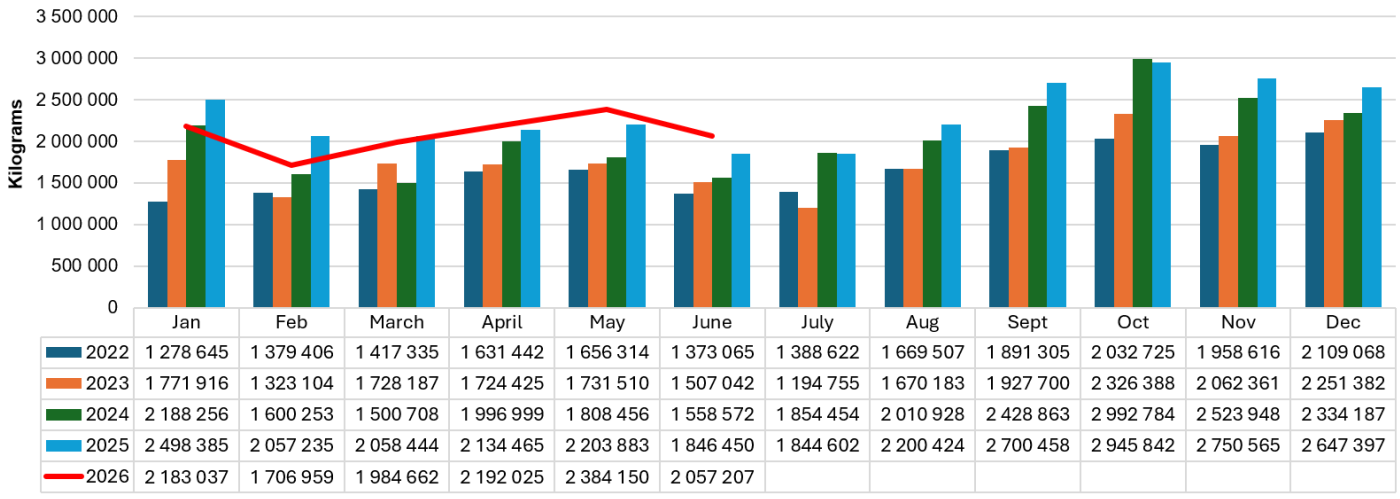


	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
2022	1 573 634	1 349 850	1 108 706	1 489 150	1 422 075	1 359 650	1 533 600	1 904 425	1 769 250	2 130 925	1 922 425	1 670 525
2023	1 764 625	1 320 700	1 528 225	1 531 675	1 748 041	1 761 975	1 784 677	1 897 675	2 074 600	2 027 400	2 103 600	2 063 100
2024	1 963 383	1 727 975	1 474 200	1 921 350	2 023 875	2 036 150	2 198 600	2 235 250	2 349 325	2 259 375	2 336 650	2 197 837
2025	2 081 550	1 880 125	2 089 379	1 892 300	2 008 125	1 879 000	2 018 175	2 232 950	2 137 175	2 251 150	2 162 575	2 072 967
2026	1 910 262	1 473 000	1 833 500	1 874 350	1 760 800	1 677 475						

(Source: Milk SA)

Figures 12 and 13 indicate the manufacturing of whey powder and butter. In the first six months of 2026, whey powder production was consistently below the production levels in the corresponding months of 2025. This resulted in a cumulative decrease of 11.00% in the amount of whey produced from January to June 2026 compared with the same period in 2025.

Figure 13: Total butter manufactured (Kg 000)



	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
2022	1 278 645	1 379 406	1 417 335	1 631 442	1 656 314	1 373 065	1 388 622	1 669 507	1 891 305	2 032 725	1 958 616	2 109 068
2023	1 771 916	1 323 104	1 728 187	1 724 425	1 731 510	1 507 042	1 194 755	1 670 183	1 927 700	2 326 388	2 062 361	2 251 382
2024	2 188 256	1 600 253	1 500 708	1 996 999	1 808 456	1 558 572	1 854 454	2 010 928	2 428 863	2 992 784	2 523 948	2 334 187
2025	2 498 385	2 057 235	2 058 444	2 134 465	2 203 883	1 846 450	1 844 602	2 200 424	2 700 458	2 945 842	2 750 565	2 647 397
2026	2 183 037	1 706 959	1 984 662	2 192 025	2 384 150	2 057 207						

(Source: Milk SA)

Butter production during the second quarter of 2026 exceeded the level recorded during the corresponding period in 2025. However, on a cumulative basis, butter production for the first six months of 2026 was 2.3% lower than during the same period in 2025.

Table 2: Total liquid and concentrated dairy products produced (Kg)

Product/Period	Kg dairy products produced					% Change 2026 to 2025
	Jan-Jun 2022	Jan-Jun 2023	Jan-Jun 2024	Jan-Jun 2025	Jan-Jun 2026	
Long life & sterilized milk	440 374 756	415 161 623	409 713 736	413 435 680	467 109 376	12,98%
Fresh milk	200 309 556	246 323 164	253 957 222	243 332 716	223 307 916	-8,23%
Sweetened, flavoured and coloured milk	21 448 430	19 158 815	20 684 874	24 864 856	27 220 223	9,47%
Fermented products	253 765 802	211 151 764	233 190 205	252 041 386	246 816 439	-2,07%
Other liquid products	3 450 692	4 188 825	3 817 181	3 307 618	3 188 100	-3,61%
Total Liquid Dairy products produced (Kg)	**919 349 236**	**895 984 191**	**921 363 219**	**936 982 255**	**967 642 054**	**3,27%**
FMP	8 890 781	8 721 064	9 190 780	9 532 403	7 357 552	-22,82%
SMP	2 173 892	1 985 450	3 033 551	3 338 967	3 542 743	6,10%
Cheese, excl cottage and cream cheese	41 957 198	41 787 163	44 126 052	43 398 170	42 956 844	-1,02%
Other concentrated products	6 556 314	7 958 767	7 252 645	6 284 473	6 057 390	-3,61%
Whey powder	8 303 065	9 655 241	11 146 933	11 830 479	10 529 387	-11,00%
Butter	8 736 206	9 786 183	10 653 244	12 798 863	12 508 040	-2,27%
Total Concentrated Dairy Products Produced (Kg)	**76 617 458**	**79 893 868**	**85 403 203**	**87 183 355**	**82 951 955**	**-4,85%**
Total Dairy Products produced (Kg)	**995 966 693**	**975 878 059**	**1 006 766 422**	**1 024 165 610**	**1 050 594 008**	**2,58%**

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