



Arla

Fonterra

Nestlé



müller

fairlife

Lactalis



LACTALIS



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DIA — Dairy Intelligence & Analytics

Weekly Analytical Digest — Global Edition

Period: 29 June – 3 July 2026

Coverage: all markets (USA, EU, Latin America, Oceania, Asia, CIS, etc.) — 105 items for the week.

Methodology: figures and statements are taken from the bodies of articles from the reporting period; the rotating 'Quotes of the Day' widget was not used as a source; unverifiable figures were not added.

Part I. Top 10 topics of the week

1. USA: a wave of processing investment — over \$11 billion

An inflow of more than \$11 billion is reshaping US milk processing: the focus is shifting from general-purpose operations to specialized high-tech plants, and new processing corridors are forming from Kansas to Idaho to serve global demand for American products. The drivers are retail vertical integration and the production of high-margin ingredients (cheese, whey proteins, ultrafiltered milk, functional products). The largest projects: Walmart — a \$350 million plant in Robinson (Texas) and a hub in Valdosta (Georgia) serving 750+ stores; Leprino Foods — \$1 billion in Lubbock; Fairlife — \$650 million in Webster; Hilmar Cheese — \$600 million in Dodge City; Great Lakes Cheese — \$500 million; Valley

Queen — \$200 million; Daisy — \$600 million (Iowa); Tillamook — an ice-cream plant (Illinois); the MWC joint venture processes 8 million pounds of milk per day.

Countries and regions: USA (Texas, Kansas, Idaho, New York, Michigan, South Dakota, Iowa, Illinois, Georgia).

Companies: Walmart, Leprino Foods, Fairlife, Hilmar Cheese, Great Lakes Cheese, Valley Queen Cheese, Daisy, Tillamook, MWC.

Expert commentary: No direct expert quotes in the article body — an analytical overview of the investment wave and its impact on the US 'dairy map'.

Materials: [USA: \\$11 billion](#)

2. Global milk prices: falling while SMP rises

The global market is in a downward trend amid oversupply, while feed, oil and urea costs decline; processing margins are improving but farmgate milk prices remain low. At the same time, UK processors are raising prices for July–August: Arla — 37.24 ppl (+1.32; organic — 56.40 ppl), Saputo — ~37 ppl, Barber's — 35.15 ppl (+1.55), Muller — 34.5 ppl, First Milk — 31.35 ppl (+0.6). EU SMP prices have been rising since the start of the year, whereas the cream, butter and cheese markets are declining.

Countries and regions: Global market; United Kingdom, EU.

Companies: Arla, Saputo, Muller, Barber's Cheesemakers, First Milk.

Expert commentary: Analyst Chris Walkland noted that UK milk production has been below year-earlier levels since mid-April, while output in the EU, US and Oceania is steady; Barber's representative Michael Masters linked the price increase to the goal of securing a sustainable milk supply.

Materials: [UK prices](#) · [Arla](#) · [Global trend](#) · [Margins vs prices](#)

3. The race for whey protein

Rising demand for functional proteins is accelerating investment in whey processing capacity — the site has made this its 'Topic of the Week'. Arla Foods and Fonterra are at the forefront of expansion; in the US, whey processing is built into the mega-projects of Leprino Foods and Fairlife. At the same time, global competition for whey-ingredient feedstock is intensifying, and some countries are ramping up domestic production to reduce import dependence.

Countries and regions: Global market; USA, EU, Oceania.

Companies: Arla Foods, Fonterra, Leprino Foods, Fairlife.

Expert commentary: No direct expert quotes in the available article bodies.

Materials: [Competition for whey](#) · [Investment in whey processing](#)

4. Lactalis: capacity expansion and legal disputes

Lactalis was at the center of the global agenda on several fronts. Investment: +€50 million into its Bavarian plant in Neuburg — raising capacity to 40,000 t of curd and 104,000 t of whey by 2030 (total output ~308,000 t), moving to round-the-clock three-shift operation and adding 70 employees (to the current 1,300 across six German sites). This is part of a global capital-restructuring program, including a commitment to invest €1 billion in modernizing French plants by 2030. Innovation: the Lactalis Nampa unit has introduced direct milk-protein extraction in Idaho (USA). During the week, legal matters involving the company also featured (the Spanish 'milk cartel' case; a fine in Australia for misleading milk labeling).

Countries and regions: Germany, France, USA (Idaho); context — Spain, Australia.

Companies: Lactalis (brands Lactel, Président).

Expert commentary: No direct expert quotes in the body of the article on the German expansion.

Materials: [Germany +€50 million](#) · [Lactalis Nampa \(Idaho\)](#)

5. Nestlé: global elimination of artificial colors

Nestlé has committed to fully eliminating artificial colors from its global product line by 2026 — a move in line with the broader trend toward 'clean label', functional and reformulated products. The initiative is significant for the whole industry as a benchmark for product composition.

Countries and regions: Global market.

Companies: Nestlé.

Expert commentary: No direct expert quotes in the available article bodies.

Materials: [Nestlé: colors](#)

6. Fonterra: expansion in China and premium products

Fonterra is expanding milk collection and launching premium cream in China, strengthening its presence in a key export market. The company is also among the leaders in whey-protein processing investment, linking it to one of the main topics of the week.

Countries and regions: New Zealand, China.

Companies: Fonterra.

Expert commentary: No direct expert quotes in the available article bodies.

Materials: [Fonterra: China](#)

7. Avian influenza (HPAI) and biosecurity

The spread of highly pathogenic avian influenza (HPAI) among mammals is raising growing biosecurity concerns in dairy farming. The topic brings veterinary control, monitoring and on-farm prevention back into focus in many countries.

Countries and regions: Global level (including the USA).

Companies: — (veterinary services and regulators).

Expert commentary: No direct expert quotes in the available article bodies.

Materials: [HPAI in mammals](#)

8. Brazil: climate, inflation and dairy-sector efficiency

Brazil's dairy market is being reshaped by El Niño and inflation. Feed planning (which cuts costs and boosts yields) and farm operational efficiency are becoming key competitiveness factors. Together this reflects Brazilian producers' adaptation to the climatic and price shocks of 2026.

Countries and regions: Brazil.

Companies: — (farms and cooperatives).

Expert commentary: No direct expert quotes in the available article bodies.

Materials: [El Niño and inflation](#) · [Feed planning](#) · [Operational efficiency](#)

9. State support for agriculture in Russia and Kazakhstan

The largest CIS markets are stepping up state support. Russia will allocate RUB 60 billion for interest-rate subsidies on farm loans and is easing administration (a temporary waiver of fines for missing electronic transport waybills; abolition of per-unit product accounting). Kazakhstan is allocating over 300 billion tenge for concessional livestock lending and 66 + 22 billion tenge for veterinary services under the 2026–2030 Comprehensive Plan; the president named agricultural digitalization a priority for investors.

Countries and regions: Russia, Kazakhstan.

Companies: Governments and agriculture ministries of Russia and Kazakhstan.

Expert commentary: Kazakhstan Deputy PM Serik Zhumangarin stressed the importance of livestock for food security; Agriculture Minister Aidarbek Saparov reported that gross livestock output reached 3.8 trillion tenge in 2025 (+3.3%).

Materials: [Russia: RUB 60 bn](#) · [Kazakhstan: 300 bn tenge](#) · [Tokayev's priorities](#)

10. Mergers, acquisitions and consolidation of the global industry

Consolidation is accelerating. In Argentina, mergers and acquisitions are reshaping the dairy landscape; Mexico's Sigma Foods is investing \$460 million to expand dairy and meat processing. Related financial stories among players include Synlait Milk's NZ\$450 million refinancing as part of a turnaround strategy, and the CIS corporate case — Rusagro passing under state control amid a court trial.

Countries and regions: Argentina, Mexico, New Zealand, Russia.

Companies: Sigma Foods, Synlait Milk, Rusagro; Argentine market players.

Expert commentary: No direct expert quotes in the available article bodies.

Materials: [Argentina: M&A](#) · [Sigma Foods \\$460M](#) · [Synlait: refinancing](#)

Part II. 10 most-mentioned companies of the week

Ranked by number of storylines and media weight for the week. The most-mentioned is Lactalis (investment, innovation and legal agenda).

1. Lactalis

The most-mentioned company of the week across several storylines: the €50 million expansion of its Bavarian plant in Neuburg (capacity to 40,000 t of curd and 104,000 t of whey by 2030, round-the-clock operation, +70 staff) within a global capital program that includes €1 billion of investment in France; the innovation of direct milk-protein extraction at the Lactalis Nampa site in Idaho. The company also featured in the legal agenda during the week (Spain, Australia).

Source: https://dairynews.today/kz/news/lactalis_invests_50_million_in_german_dairy_facility_expansion_3412962.html

2. Arla Foods

Raised farmgate milk prices in the UK (conventional — 37.24 ppl, +1.32; organic — 56.40 ppl) and is cited as one of the leaders in whey-protein processing investment — at the intersection of the week's two key themes (prices and whey).

Source: https://dairynews.today/kz/news/arla_increases_conventional_milk_prices_amid_stable_dairy_markets_5584474.html

3. Fonterra

Expanding milk collection and launching premium cream in China, strengthening its position in a crucial export market; alongside Arla, it is named at the forefront of whey processing investment.

Source: https://dairynews.today/kz/news/fonterra_expands_milk_collection_and_launches_premium_cream_in_china_8656600.html

4. Nestlé

Announced the full elimination of artificial colors by 2026 across its global line — a high-profile benchmark for product composition for the whole industry, in line with the 'clean label' trend.

Source: https://dairynews.today/kz/news/nestl_commits_to_global_elimination_of_artificial_colors_by_2026_9804313.html

5. Müller

Together with Lavazza, launched a range of Italian-style ready-to-drink coffee — a notable case at the intersection of the dairy and beverage categories (RTD coffee).

Source: https://dairynews.today/kz/news/lavazza_and_muller_introduce_italian_inspired_ready_to_drink_coffee_range_7250437.html

6. Walmart

A symbol of retail vertical integration into processing: building its own \$350 million dairy plant in Texas and a processing hub in Georgia — one of the drivers of the US investment wave.

Source: https://dairynews.today/kz/news/us_dairy_industry_transformed_by_11_billion_processing_investments_6814068.html

7. Leprino Foods and Fairlife

The largest US ingredient projects: Leprino Foods' \$1 billion plant in Lubbock (Texas) and Fairlife's \$650 million facility in Webster (New York), geared to cheese, whey proteins and ultrafiltered milk to meet demand for functional products.

Source: https://dairynews.today/kz/news/us_dairy_industry_transformed_by_11_billion_processing_investments_6814068.html

8. Sigma Foods

Investing \$460 million to expand dairy and meat processing — a major bet on capacity growth in North/Latin America and part of the industry's consolidation wave.

Source: https://dairynews.today/kz/news/sigma_foods_invests_460_million_to_expand_dairy_and_meat_processing_3328973.html

9. Synlait Milk

Secured NZ\$450 million in refinancing as part of a turnaround strategy — a significant financial development for the New Zealand processor, stabilizing its balance sheet.

Source: https://dairynews.today/kz/news/synlait_milk_secures_nz_450_million_refinancing_for_turnaround_strategy_6306639.html

10. Rusagro

The largest CIS corporate story: the start of a closed trial of founder Vadim Moshkovich (damages ~RUB 50 billion) and the transfer of the holding's controlling stake to state control; involves Solnechnye Produkty, Solpro and Syngenta.

Source: https://dairynews.today/kz/news/sudebnyy_protsses_po_delu_osnovatelya_rusagro_startuet_v_moskve_5430356.html

Part III. Company of the week

Lactalis

Lactalis is the company of the week by virtue of its overall presence in the global agenda: large-scale capacity investment (Germany, +€50 million, and €1 billion in France), a technological innovation in the US (direct protein extraction, Idaho), and a simultaneous legal agenda in Europe and Australia. This breadth — from capital investment to regulatory risk — sets it apart among the week's players.

For context: the editorial 'Topic of the Week' shifted toward investment in whey-protein processing (led by Arla Foods and Fonterra), while the largest single-country story was the \$11 billion overhaul of US processing.

Part IV. Commodity indicators for the week

Hard numeric figures for dairy commodities this week are concentrated in raw-milk prices (UK) and investment capacities (US, Germany). Empty categories are marked 'no data for the week' and left blank. Coverage — global market and specific countries.

Prices — raw milk, processors' farmgate prices

Processor	Price	Change	Period
Arla (conventional)	37.24 ppl	+1.32 ppl	July
Arla (organic)	56.40 ppl	no change	July
Saputo	~37.0 ppl	increase	August
Barber's Cheesemakers	35.15 ppl	+1.55 ppl	August
Muller	34.5 ppl	stable	August
First Milk	31.35 ppl	+0.6 ppl	from July 1

Region: United Kingdom. Unit — pence per litre (ppl).

Prices — other products (direction; no specific values for the week)

Product	Trend	Region
SMP	rising	EU
Butter / AMF	declining	UK / EU
Cheese	declining	UK / EU
Cream	declining	UK / EU
Dairy commodities overall	downward trend	global market

No numeric data for the week: prices for WMP, whey, AMF (in absolute terms) were not published.

Capacity and production (from investment announcements)

Indicator	Value	Region
Lactalis, Neuburg plant (by 2030)	40,000 t curd + 104,000 t whey; ~308,000 t total	Germany
MWC (JV), daily throughput	8 million lb milk/day	USA (Michigan)
Gross livestock output, 2025	3.8 trillion tenge (+3.3%)	Kazakhstan
Milk production (qualitative)	below year-ago since mid-April	United Kingdom
Milk production (qualitative)	steady	EU, USA, Oceania

The Kazakhstan figure covers all livestock. No data for the week: production volumes of raw milk, SMP, WMP, cheese, whey, AMF in physical terms for most markets.

Investment in processing (context, not a commodity price)

Project	Amount	Region
US processing investment wave	> \$11 billion	USA
Walmart — dairy plant	\$350 million	USA (Texas)
Leprino Foods — plant	\$1 billion	USA (Texas)
Fairlife — plant	\$650 million	USA (New York)
Hilmar Cheese	\$600 million	USA (Kansas)
Daisy — cottage cheese & sour cream	\$600 million	USA (Iowa)
Great Lakes Cheese	\$500 million	USA (New York)
Sigma Foods — processing	\$460 million	Mexico/USA
Lactalis — plant in Germany	€50 million	Germany
Synlait — refinancing	NZ\$450 million	New Zealand

Export volumes (growth rates; some cover agri-products overall)

Direction	Value	Period	Region
Dairy → Africa	×12	Jan–Apr 2026	Belarus
Dairy → CIS	×2	Jan–Apr 2026	Belarus
Dairy → Asia	×1.5	Jan–Apr 2026	Belarus
Dairy exports (total)	+14%	early 2026	Chile

Values are growth rates/multiples (not tonnes). No data for the week: exports of SMP/WMP/cheese/whey/AMF in tonnes.

Appendix. Sources (links as text)

USA: processing investment

- https://dairynews.today/kz/news/us_dairy_industry_transformed_by_11_billion_processing_investments_6814068.html
-

Prices and market

- https://dairynews.today/kz/news/uk_milk_prices_see_increment_despite_continued_market_uncertainty_3394569.html
 - https://dairynews.today/kz/news/arla_increases_conventional_milk_prices_amid_stable_dairy_markets_5584474.html
 - https://dairynews.today/kz/news/global_dairy_market_faces_downward_trend_amid_lower_production_costs_1807832.html
 - https://dairynews.today/kz/news/dairy_production_margins_improve_but_milk_prices_remain_low_5258802.html
-

Whey protein

- https://dairynews.today/kz/news/global_competition_for_whey_protein_ingredients_intensifies_5258339.html
 - https://dairynews.today/kz/news/global_dairy_industry_boosts_investments_in_whey_protein_processing_7761373.html
-

Companies

- https://dairynews.today/kz/news/lactalis_invests_50_million_in_german_dairy_facility_expansion_3412962.html
 - https://dairynews.today/kz/news/lactalis_nampa_innovates_direct_milk_protein_extraction_in_idaho_5851223.html
 - https://dairynews.today/kz/news/nestl_commits_to_global_elimination_of_artificial_colors_by_2026_9804313.html
 - https://dairynews.today/kz/news/fonterra_expands_milk_collection_and_launches_premium_cream_in_china_8656600.html
 - https://dairynews.today/kz/news/lavazza_and_m_ller_introduce_italian_inspired_ready_to_drink_coffee_range_7250437.html
 - https://dairynews.today/kz/news/sigma_foods_invests_460_million_to_expand_dairy_and_meat_processing_3328973.html
 - https://dairynews.today/kz/news/synlait_milk_secures_nz_450_million_refinancing_for_turnaround_strategy_6306639.html
 - https://dairynews.today/kz/news/mergers_and_acquisitions_reshape_argentina_s_dairy_industry_landscape_7777823.html
 - https://dairynews.today/kz/news/sudebnyy_protsest_po_delu_osnovatelya_rusagro_startuet_v_moskve_5430356.html
-

Biosecurity, Brazil, CIS state support

- https://dairynews.today/kz/news/rasprostranenie_virusa_grippa_ptits_sredi_mlekopitayushchikh_vyzyvaet_obespokoennost_9191443.html
 - https://dairynews.today/kz/news/el_ni_o_and_inflation_reshape_brazil_s_dairy_market_in_2026_3494288.html
 - https://dairynews.today/kz/news/forage_planning_reduces_costs_and_boosts_milk_production_in_brazil_7590621.html
 - https://dairynews.today/kz/news/pravitelstvo_rossii_vydelit_60_mlrd_rublej_na_podderzhku_agrarijev_8480532.html
 - https://dairynews.today/kz/news/kazakhstan_investiruet_bolee_300_mlrd_tenge_v_razvitie_zhivotnovodstva_6521956.html
 - https://dairynews.today/kz/news/chilean_dairy_exports_increase_by_14_in_early_2026_1952484.html
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