



CALIFORNIA

# Dairy Review

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California Department of Food and Agriculture  
A.G. Kawamura, Secretary

## CWT RETAINS FORMER LAND O'LAKES EXECUTIVE TO DEVELOP STRATEGIC PLAN FOR FUTURE EFFORTS



*Don Berg To Develop Plan Mapping Out Future Direction of CWT*

A senior dairy cooperative leader has been retained by Cooperatives Working Together (CW) to develop a strategic plan mapping out the future direction of the farmer-funded and directed self-help program that began in 2003. Don Berg, who retired last year as the Vice President of Member and Public Affairs for Land O'Lakes, Inc., in Arden Hills, MN, will start work immediately on behalf of CWT. His role will be to gather input from those participating currently in CWT, including dairy cooperative executives as well as individual farmers, and then devise a road map for CWT's future.

Berg retired Dec. 31, 2004, from Land O'Lakes after serving with the cooperative for more than 30 years. As Member and Public Affairs Vice President the past four years, Berg was responsible for member relations, communications, public relations, governance, community relations and legislative affairs activities. His plan will examine every aspect of how CWT is funded, managed, and directed. In addition to looking at membership and revenue needs, the strategic plan being developed will also look into the future effectiveness of CWT's milk reduction efforts, which include herd retirement and export assistance programs.

The timetable for the plan's development calls for a preliminary draft to be done in March, and a final version to be completed this summer. Berg commented that CWT has had a great first two years of life, but we need to methodically examine where we want this program to go in the future. CWT has been run as a business, according to certain benchmarks and strategies. The future strategic plan will focus on how we can maximize the value of program for dairy producers, cooperatives and for the betterment of the dairy industry long-term.

CWT is being funded by dairy cooperatives and individual dairy farmers, who are contributing 5 cents per hundredweight assessment on their milk production from July 2004 through June 2005. For more on CWT's activities, visit the website at [www.cwt.coop](http://www.cwt.coop).

# PRODUCTION, PRICES, QUOTA TRANSFERS, ALFALFA

## December Milk Production

Milk production in California for December 2004 totaled 3.086 billion pounds, up 4.7 percent from December 2003. USDA's estimate for U.S. milk production for December 2004 in the 20 major dairy states is 12.4 billion pounds, up 1.0 percent from December 2003. Production per cow in the 20 major states averaged 1,602 pounds for December, 6 pounds above December 2003. ☀

## Minimum Class Prices

Statewide average hundredweight prices

Class	Dec.	Jan.	Feb.
1	\$16.25	\$18.55	\$15.35
2	\$13.67	\$13.67	N/A
3	\$13.51	\$13.51	N/A
4a	\$12.97	N/A	N/A
4b	\$14.99	N/A	N/A

## Federal Order and California Minimum Class 1 Prices

Average Hundredweight Prices

Regions	Dec.	Jan.	Feb.
Phoenix, Arizona	\$16.78	\$19.00	N/A
Southern California	\$16.38	\$18.69	\$15.49
Portland, Oregon	\$16.33	\$18.55	N/A
Northern California	\$16.10	\$18.42	\$15.22
<b>Boston (Northeast)</b>	<b>\$17.68</b>	<b>\$19.90</b>	<b>N/A</b>

## Quota Transfer Summary

For December 2004, three dairy producers transferred 1,568 pounds of SNF quota. December quota sales averaged \$474 per pound of SNF (without cows), average ratio of 2.43. For January 2005, six dairy producers transferred 4,771 pounds of SNF quota. January quota sales averaged \$471 per pound of SNF (without cows), average ratio of 2.49. ☀

## Alfalfa Update: January

**Northern California:** Premium and Supreme alfalfa was steady in a light test, with very light supplies. Fair and Good alfalfa was mostly steady with a good demand but light supplies. Retail and Stable hay was steady with good demand, but most suppliers were only able to take care of regular customers. The rains of early January abated for the end of the month. Some interest starting from exporters.

**Southern California:** Premium and Supreme alfalfa not well tested. Fair and Good alfalfa was steady with good demand and very light supplies. Retail and Stable hay was steady with good demand but most suppliers only taking care of regular customers. Some hay is being laid down in the southern desert with the anticipation that it will be in the stack by early February. ☀

## Supreme Hay Prices

Statewide average prices per ton

Area	12/31	1/7	1/14	1/21
Petaluma	N/A	\$182	\$180	—
North Valley <sup>1</sup>	\$175-185	\$180-194	\$175-195	\$185
South Valley <sup>2</sup>	\$178-190	\$165-195	\$170	\$170
Chino Valley	\$155	\$155	—	—

<sup>1</sup> North Valley is Escalon, Modesto and Turlock areas.

<sup>2</sup> South Valley is Tulare, Visalia and Hanford areas.

## Alfalfa Hay Sales/Delivery

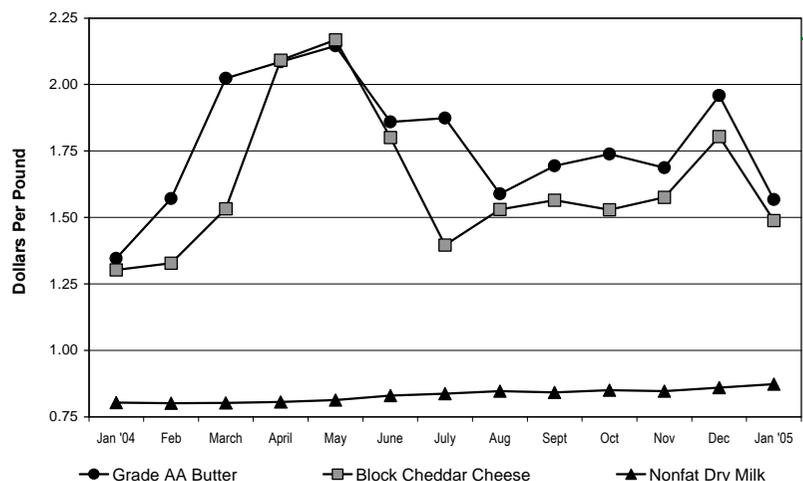
	Dec.	Jan.
Tons Sold <sup>1</sup>	22,822 (3 weeks data)	45,904
Tons Delivered <sup>2</sup>	16,955 (3 weeks data)	28,720

<sup>1</sup> For current or future delivery.

<sup>2</sup> Contracted or current sales.

Alfalfa hay sales, deliveries and Supreme quality prices per ton, delivered to dairies, as reported by the USDA Market News Service, Moses Lake, WA, (509) 765-3611, <http://www.ams.usda.gov/marketnews.htm>

## Grade AA Butter, Block Cheddar Cheese, and Nonfat Dry Milk Prices Used in the Calculation of California Class 1 Milk Prices





# BOVINE SPONGIFORM ENCEPHALOPATHY UPDATE

## United States BSE Surveillance

The United States Department of Agriculture (USDA) enhanced BSE surveillance in June 2004 after diagnosing BSE in a Canadian-origin cow in Washington State in December 2003. The plan is to determine if BSE is present in U.S. cattle, and if present, at what level. A "cost-recovery" system for the movement, storage and disposal of carcasses or products is in place to aid the cattle industry during this surveillance program.

As many samples as possible are being collected over a 12 to 18 month period from "high-risk" cattle over thirty months of age that:

- Have signs consistent with BSE,
- Cannot rise or cannot walk,
- Die from unknown causes.

The estimated U.S. goal is to test 268,500 cattle. Since June 2004, over 199,000 samples have been collected from U.S. cattle and approximately 20,000 of these were collected in California. All of these samples have been negative for BSE.

## Food and Drug Actions

In July 2004, the Food and Drug Administration (FDA) prohibited certain cattle-derived materials in all FDA-regulated human food and cosmetics including:

- Dietary supplements and ingredients
- Infant formula
- Canned and frozen foods
- Bakery goods, snack food, candy, and chewing gum
- Food ingredients and additives
- Cosmetics and cosmetic ingredients

This rule is consistent with the actions taken in December 2003 that prohibited these materials from human food.

Prohibited cattle materials include:

- Specified risk materials - skull, brain, eyes, vertebral column, spinal cord and associated nerve ganglia
- Small intestine of all cattle
- Material from non-ambulatory disabled cattle
- Material from cattle not passed for human consumption
- Mechanically separated beef

## Canadian BSE Surveillance

The Canadian Food Inspection Agency (CFIA) increased BSE surveillance in January 2004 after two cases of BSE were diagnosed in cattle originating from Alberta during 2003. The program objective is to determine the prevalence of BSE by testing "high-risk" cattle. The goal was to test a minimum of 8,000 animals in 2004 and 38,000 in subsequent years. A reimbursement plan introduced in September 2004 increased the submission rate; Canada collected 23,549 samples in 2004.

## BSE in Canada

In January 2005, BSE was confirmed in an eight-year-old dairy cow and in a seven-year-old beef cow. Both were born in Alberta. No part of these animals entered human food or animal feed. CFIA suspects these animals were infected through contaminated feed produced before or shortly after the 1997 feed ban. The investigations focus on tracing the infected cows, their offspring, and other cattle born on the same farms within a year of the infected animals.

The four cases of BSE diagnosed in Canadian-born cattle since May of 2003 have cost the industry an estimated five billion dollars. These recent cases have also raised concerns about the proposed reopening of the Canadian border.

## Minimal-Risk Regions

The USDA published a final rule on classifying regions as "minimal risk for introducing BSE into the U.S." on January 4, 2005. The rule attempts to continue to protect the U.S. from BSE while removing unnecessary restrictions on trade in ruminants, their products and byproducts.

This rule recognizes Canada as the first country to be classified as a minimal-risk region after diagnosing BSE. When this rule becomes effective on March 7, 2005, the following commodities can be imported from Canada:

- Cattle for immediate slaughter or feeding (must be less than 30 months old when slaughtered). Feeder cattle must be branded to show their origin ("C/N" will be used for Canada), individually identified with an ear tag tracing to their farm of origin, moved to feedlots in "sealed" vehicles, and cannot go to more than one feedlot. Specified risk materials must be removed at slaughter.
- Meat from cattle, and certain other products and byproducts including bovine livers, tongues, gelatin, and tallow.

Other regions that meet the minimal-risk conditions in the future will be classified through rulemaking and a risk assessment.

CDFFA Animal Health Branch Offices	
Sacramento (HQ)	916-654-1447
Modesto	209-491-9350
Ontario	909-947-4462
Redding	530-225-2140
Tulare	559-685-3500
<b>USDA/APHIS/VS</b> 916-857-6170 or 877-741-3690	

For more information, visit at: <http://www.cdfa.ca.gov/> or <http://www.aphis.usda.gov/lpa/issues/bse/bse.html>

## FOREIGN ANIMAL DISEASE UPDATE FOOT AND MOUTH DISEASE

Foot and Mouth Disease (FMD) is endemic in many parts of the world. The following countries reported an outbreak of FMD to OIE (Office International Epizootics) in 2004:

Brazil	Columbia	Peru
Uganda	Tajikistan	Libya
Syria	Argentina	Malawi
Russia	Mongolia	Israel
Nigeria	Zambia	China
South Africa		

It is one of the most highly contagious animal diseases and can be easily transmitted by direct or indirect contact, animate vectors, inanimate vectors, and airborne means. Although benign to humans, this disease has low mortality but causes severe loss in production to adult cloven-hoofed animals and high mortality in young animals. **It is estimated that for every hour that an outbreak of FMD were to go undetected in the U.S., there would be a cost of 1-3 million dollars to taxpayers and producers.** With our highly mobile society and the ease of livestock movement within the United States, it is of paramount importance that the disease, once introduced (whether intentionally or unintentionally), be detected immediately and movement of all livestock stopped. As was experienced in the United Kingdom, an outbreak of this disease could be economically devastating, if the outbreak were not halted effectively and quickly.

It is of utmost importance that the producer AND their employees be aware of the symptoms of FMD. A veterinarian should be contacted immediately if any livestock exhibits vesicles in the mouth, teats, and feet, excessive salivation, severe lameness, and fever.

Increased on-farm awareness by the producer in the following areas will help mitigate the devastating effects of an FMD outbreak:

- Vigilant on farm biosecurity
- Awareness of all on-farm traffic and visitors
- Report suspicious clinical signs immediately to your veterinarian, California Department of Food and Agriculture (CDFA), or United States Department of Agriculture (USDA)
- Educate employees to the clinical symptoms of FMD and/or sudden production losses

### CDFA Animal Health Branch Offices

Sacramento (HQ) 916-654-1447  
Modesto 209-491-9350  
Ontario 909-947-4462  
Redding 530-225-2140  
Tulare 559-685-3500

**USDA/APHIS/VS 916-857-6170 or 877-741-3690** 

## National Dairy Situation and Outlook – USDA Estimates

### Milk Production and Cow Numbers

Monthly: Compared to 2003, USDA estimates that overall milk production across the U.S. was up 0.7% in December, led by Arizona's 6.8% growth in milk production (on 11,000 more cows and 5 less pounds per cow). California's estimated production was up 4.6% (on 45,000 more cows and 35 more pounds per cow). Among the western states, Arizona was up 6.8%; New Mexico down 5.5%; and Washington down 1.5%. Three of the top 10 states reported an increase: Idaho 4.3%, Pennsylvania 1.2%, and California 4.6%.

Quarterly: For the fourth quarter of 2004 compared to the third quarter of 2004, U.S. milk cow numbers were down 0.14% at 9.020 million, production per cow was up 0.3%; the net effect was a 0.2% increase in milk production to 42.3 billion pounds. USDA projects that for the first quarter of 2005 compared to the fourth quarter of 2004, U.S. milk cow numbers will decrease 40,000 cows to 8.980 million cows, production per cow will be up 3.4%; the net effect would be a 2.8% increase in milk production to 43.5 billion pounds.

### Milk Prices

Comparing the fourth quarter of 2004 to the third quarter of 2004, U.S. average milk prices were up \$0.50/cwt. to \$16.03/cwt. USDA projects that for the first quarter of 2005, U.S. average milk prices will be down \$0.50-\$1.00/cwt. compared to the fourth quarter; including a \$2.00-\$2.50 decrease/cwt. Class 4b price change and a \$0.40-1.00 decrease/cwt. Class 4a price change.

### Utility Cow Prices

Comparing the fourth quarter of 2004 to the third quarter of 2004, average U.S. utility cow prices were down \$5.50/cwt. to a national average of \$50.78/cwt. USDA projects that utility cow prices will average \$51-53 in the first quarter of 2005.

Information from the USDA-NASS publication "Milk Production" and the USDA-ERS publication: "Livestock, Dairy, and Poultry Outlook." 

## California Dairy Review Available on Website

A reminder to readers that this publication is available on the Dairy Marketing Branch website at [http://www.cdca.ca.gov/dairy/ca\\_dairyrev\\_newsletter.html](http://www.cdca.ca.gov/dairy/ca_dairyrev_newsletter.html) 

## Canada Confirms Two New Cases of Mad Cow Disease

On January 3, 2005, Canada confirmed a case of mad cow disease in a dairy cow, just days after the United States said it planned to reopen its border to Canadian beef. The dairy cow from Alberta tested positive for bovine spongiform encephalopathy, as mad cow disease is formally known, according to the Canadian Food Inspection Agency (CFIA). The U.S./Canadian border was closed 19 months ago when a cow in northern Alberta was discovered to have the disease. Concerns persisted after a Canadian-born cow in Washington state was found in December 2003 to have the disease. In addition, on January 11, 2005, Canada officials confirmed another case of mad cow disease in a beef cow. The following are updates on these two cases:

### January 3, 2005 Confirmed Case:

- The Canadian Food Inspection Agency has confirmed that this animal, born in 1996, was exposed to feed rations containing meat and bone meal. That feed was produced before the ruminant feed ban that went into effect in 1997.
- Nine animals from the birth cohort of this infected animal have been euthanized and tested negative for BSE.
- During the investigation to find all birth cohorts of this animal, CFIA investigators determined that three animals were exported to the United States. U.S. officials have been notified.
- U.S. and Canadian investigators are still looking for 27 animals of interest from the birth cohort.

### Jan 11, 2005 Confirmed Case:

- 37 animals have been identified as part of the birth cohort for this infected beef cow which was born in March 1998. All have been quarantined. They will all be euthanized and tested for BSE.
- Investigators are collecting information pertaining to the feed used on the farm of origin. They are also tracing records from the farm of origin and investigating feed retailers and manufacturers.
- CFIA officials are working with international animal health and feed experts to review how well the industry has complied with the feed ban.

Before the trade ban, Canada sold more than 70 percent of its live cattle to the United States. That market was worth \$1.5 billion in 2002. The discovery in Washington state a year ago is the only confirmed case of mad cow disease in the United States. There have been a handful of suspected mad cow cases during preliminary screening in the United States, but further tests produced negative results. 

## National Milk Producers Federation and Dairy Relief Inc. to Assist Tsunami Victims and Families

In conjunction with the National Milk Producers Federation, Dairy Relief Inc. has set up a special fund for dairy farmers and other interested parties to donate money to the victims of last month's tsunami, which to date has claimed more than 150,000 lives across South Asia.

"There's such tremendous, unprecedented need across at least a half-dozen Asian nations that we felt this is a perfect opportunity for America's dairy farmers to pitch in," said Gene Paul, President of Dairy Relief. Dairy Relief is the dairy industry's ongoing charitable effort to improve the lives of those less fortunate. The money collected through Dairy Relief, Inc., will be sent to the American Red Cross for its specific fund that will be helping the victims of the tsunami flooding and earthquake. All contributions made to the "Dairy Relief-Asian Disaster Fund" ultimately will be donated to the victims and families overseas.

Tax-deductible contributions should be mailed to the "Dairy Relief – Asian Disaster Fund," c/o the National Milk Producers Federation, 2101 Wilson Blvd., Suite 400, Arlington, VA 22201.

Formed in 1998, Dairy Relief is the only U.S.-based charitable organization whose sole purpose is providing quality American dairy products to needy people around the world. Dairy Relief is run by a volunteer board of dairy farmers and dairy cooperative executives. Dairy Relief accepts either tax-deductible cash contributions, or in-kind product contributions. For more information on Dairy Relief, Inc., contact Carl Baumann at (618) 654-3676 or [cjbaum@papadocs.com](mailto:cjbaum@papadocs.com). 

## Tulare Farm Show

The annual Tulare Farm Show is scheduled to run February 8-10, 2005, at the World Ag Expo, just off Highway 99 in Tulare. The Farm Show has been an integral part of the farming industry for many years, offering a wide variety of exhibits, information, equipment, and computer technologies to those interested in learning more about the latest advances in the industry. Come visit us at the CDFA display in the Dairy Pavilion at Booths 6712 and 6713 - see you there! 

## Quota Allocations

Annually, the Department of Food and Agriculture must determine if there has been an increase in the Class 1 and Class 2 solids-not-fat usage during the most recent September through August time period. In making this determination, the current time period is compared to the previous highest year since 1988-89. Any increase in such usage is allocated to producers as pool quota. New quota allocations are issued in January of the following year.

A comparison of Class 1 and Class 2 sales for the period of September 2003 through August 2004, with comparable sales for September 1990 through August 1991 (the highest previous year) reveals that there was a decrease in Class 1 and Class 2 usage. Therefore, the Department is announcing that there will be no new quota allocated on January 1, 2005. If you have any questions, please contact Donald Shippelhouse or John Lee at (916) 341-5901. ☀

## Dairy Producer and Processor Contract Reminder

A reminder to producers and processors that all bulk milk purchase contracts entered into must be on file with the Department. The Food and Agricultural Code, Sections 61411(d)(2) and 62191(c), requires producers to file signed copies of contracts with the Department within 5 days of its execution.

The Department is obligated by law to enforce terms as specifically stated in the contract. If you are buying or selling milk at terms that are different from those specified in the contract, an amendment to the contract must be submitted to the Department immediately. An amendment to the contract requires signatures of all parties to the contract.

There have been several occasions recently where payment terms were changed via oral agreements, unilateral letters or invoices. Under audit, or challenge by a party to the contract, the Department will look to the terms of the written contract and any formal written amendments to the contract for enforcement purposes. If you have any questions regarding these policies, please contact Robert Maxie at (916) 341-5901. ☀

## Change in Dietary Guidelines Could Be Huge for Dairy



If Americans were to follow the government's newly announced dietary guidelines and increase their consumption of dairy products from two to three servings per day, the affect would be huge — an extra 15.9 million gallons of milk consumed each day. That's assuming each of the 254 million Americans over the age of eight drinks an extra 8-ounce serving of milk per day. For the first time in 25 years, the federal government recommends more dairy in the diet. The newly released 2005 Dietary Guidelines for Americans increased the recommendation to 3 servings of lowfat or fat-free dairy foods every day, compared to the 2 to 3 servings recommended in the 2000 Dietary Guidelines.

The Dietary Guidelines offer nutrition advice to Americans ages 2 and over and serve as a practical plan for achieving good health and disease prevention through diet. The Guidelines also provide health professionals, such as doctors and nutritionists, with a compilation of the latest science-based recommendations. Health professionals often use these guidelines as a basis for their own professional recommendations.

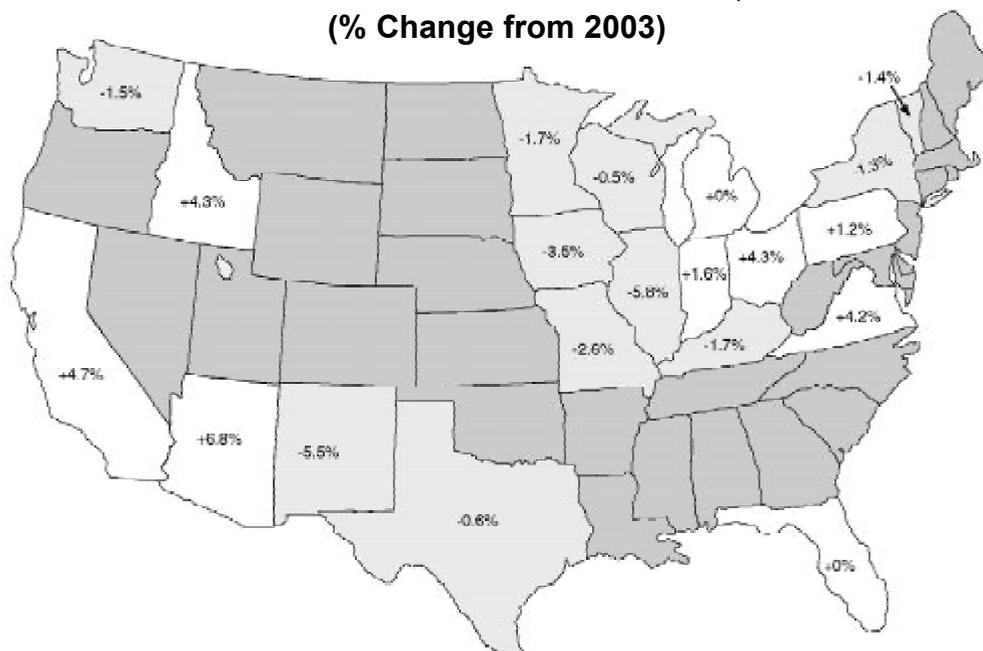
National, state and regional dairy checkoff staffs are working to distribute the positive news to consumers, health professionals and the media by:

- Providing expert spokespeople for interviews
- Providing TV stations with video footage of families consuming dairy products
- Developing new materials for school foodservice professionals
- Sending newspaper and magazine editors suggested meal plans for readers to improve their diets with dairy.

National Dairy Council (NDC), the nutrition education arm of the dairy checkoff program, provided important nutrition research and scientific expertise to the Dietary Guidelines Advisory Committee. NDC, which has been a leader in nutrition research and education since 1915, helps sponsor some of the top dairy nutrition science research. ☀

## December Milk Production in the Top 20 States

(% Change from 2003)



### For the U.S. overall, comparing December 2004 to December 2003:

- Milk production during December was up 0.7%
- The number of cows on farms was 9.011 million head, up 17,000 head
- Production per cow averaged 1,582 pounds, 7 pounds more than December 2003
- Eleven of the top twenty milk producing states showed a decrease in milk production

As reported by USDA  
and CDFA (for California)

## Milk Production Cost Comparison Summary for California <sup>1/</sup>

By Month, January 2004-December 2005

Month	North Coast		North Valley		South Valley		Southern California		Statewide Weighted Average	
	2004	2005	2004	2005	2004	2005	2004	2005	2004	2005
<i>Dollars per Hundredweight</i>										
January	15.45		13.82		12.19		12.82		12.98	
February	15.81		13.61		12.47		12.96		13.06	
March	14.37		13.16		12.24		13.08		12.77	
April	13.77		13.27		12.50		13.07		12.91	
May	13.44		13.23		12.76		13.35		13.04	
June	13.70		13.45		13.09		13.63		13.32	
July	13.66		13.03		12.83		13.41		13.01	
August	14.16		13.00		12.82		13.48		13.03	
September	14.33		13.44		13.11		13.56		13.34	
October	14.22		13.43		13.08		13.38		13.29	
November										
December										

<sup>1/</sup> Cost Comparison Summary data includes an allowance for management and a return on investment.

# Hundredweight Pool Prices

Month	Quota	Overbase
June '03	\$11.17	\$ 9.47
July	\$12.72	\$11.02
August	\$13.96	\$12.26
September	\$14.34	\$12.64
October	\$14.45	\$12.75
November	\$13.56	\$11.86
December	\$13.09	\$11.39
January '04	\$12.71	\$11.01
February	\$13.32	\$11.62
March	\$15.44	\$13.74
April	\$18.23	\$16.53
May	\$18.69	\$16.99
June	\$17.46	\$15.76
July	\$15.03	\$13.33
August	\$14.74	\$13.04
September	\$15.21	\$13.51
October	\$14.81	\$13.11
November	\$15.74	\$14.04
December	\$15.74	\$14.04

# Milk Mailbox Prices

## Milk Mailbox Prices in Dollars per Hundredweight

**	April*	May	June*	July*	August	September*	October
California*	\$17.21	\$17.57*	\$16.38*	\$13.91*	\$13.73*	\$14.37*	\$14.12
USDA <sup>2</sup> *	\$17.40*	\$19.01*	\$18.25*	\$16.32*	\$14.75*	\$15.37*	\$15.58*

<sup>1</sup> California mailbox price calculated by CDFSA.  
<sup>2</sup> All federal milk market order weighted average, as calculated by USDA.



In October 2004, mailbox prices for selected reporting areas in Federal milk orders averaged \$15.58 per cwt., \$0.21 more than the figure for the previous month. The component tests of producer milk in October 2004 were butterfat, 3.73%; protein, 3.11%; and other solids 5.68%. On an individual reporting area basis, mailbox prices increased in all reporting areas except for two, and ranged from \$18.13 in Florida to \$13.41 in New Mexico. In October 2003, the Federal milk order all-area average mailbox price was \$14.96, \$0.62 lower.

\*\*Mailbox prices for Idaho and Utah are being discontinued due to the termination of the Western Federal Order.

In accordance with the California Government Code and ADA requirements, this publication can be made available in an alternative format by contacting Karen Dapper at (916) 341-5988, by email at dairy@cdfa.ca.gov, or contacting TDD 1-800-735-0193.

**California Department of Food and Agriculture**  
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**Milk Pricing Information:**  
 Within California 1-800-503-3490  
 Outside California 1-916-442-MILK

**Dairy Marketing Branch:**  
 Phone (916) 341-5988; Fax (916) 341-6669  
 Website: www.cdfa.ca.gov/dairy  
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