

California

Dairy Review

A publication serving the California dairy industry for over 12 years

Volume 13 Issue 7

July 2009

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USDA Decides to Re-Open the Dairy Export Incentive Program

The California Department of Food and Agriculture (CDFA) is supportive of the decision by U.S. Department of Agriculture (USDA) to implement the full allocations under the Dairy Export Incentive Program (DEIP). CDFA is pleased that its letter of support to Secretary Vilsack's contributed to this decision.

California's dairy economy, along with the national and global dairy economy, is facing a critical period in which production costs are well in excess of the dairy product prices. Dairy farms across the nation are struggling to survive, with many already forced to leave the industry. Full usage of DEIP will remove more than 1.5 billion pounds of milk from the U.S. market and help bring the surplus production into better balance with current commercial demand.

USDA announced allocations on May 22, 2009 for the fiscal period ending June 30, 2009. This short time frame only provided for a few weeks to accept bids in the current round. Bids already have been accepted for a significant amount of powder for the world market with some of those sales reported to Africa and Mid-Eastern customers. It is imperative that marketers

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Publications Update . . .

In this challenging fiscal climate, the production of our reports, newsletters, and other publications may become more difficult to accomplish in the traditional formats we are all accustomed to. Some of the recent restrictions applied to contracting and purchase order processing have the potential to hinder our ability to procure the necessary printing and mailing services in a timely fashion. We are committed to providing this important information in a timely manner and therefore, we may have to provide these publications solely through our website at: www.cdfa.ca.gov/dairy

Please feel free to contact the Dairy Marketing Branch at (916) 341-5988 with any questions and watch our website for updated information on this issue.



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

Production, Prices, Quota Transfers, Alfalfa

May Milk Production

USDA estimates U.S. milk production for May 2009 in the top 23 milk producing states at 15.5 billion pounds, up 0.2 percent from May 2008. Production per cow in the top 23 milk producing states averaged 1,828 pounds for May, 9 pounds above May 2008.

Minimum Class Prices

California Hundredweight Prices

Class	May	June	July
1 No. Calif.	\$12.68	\$11.70	\$11.88
So. Calif.	\$12.96	\$11.97	\$12.15
2 No. Calif.	\$ 9.96	\$10.34	\$10.34
So. Calif.	\$10.20	\$10.57	\$10.57
3	\$ 9.91	\$10.29	\$10.29
4a	\$10.03	N/A	N/A
4b	\$ 9.54	N/A	N/A

Federal Order and California Minimum Class 1 Prices

Hundredweight Prices

Regions	May	June	July
Phoenix, Arizona	\$13.32	\$12.43	\$12.61
Southern California	\$12.96	\$11.97	\$12.15
Portland, Oregon	\$12.87	\$11.98	\$12.16
Northern California	\$12.68	\$11.70	\$11.88
Boston (Northeast)	\$14.22	\$13.33	\$13.51

Quota Transfer Summary

Quota Transfers	Apr.	May	June
Number of Sellers	9	9	9
Pounds of SNF Quota Transferred	11,124	11,246	4,464
Average Price Per Pound of SNF Quota	\$407	\$406	\$409

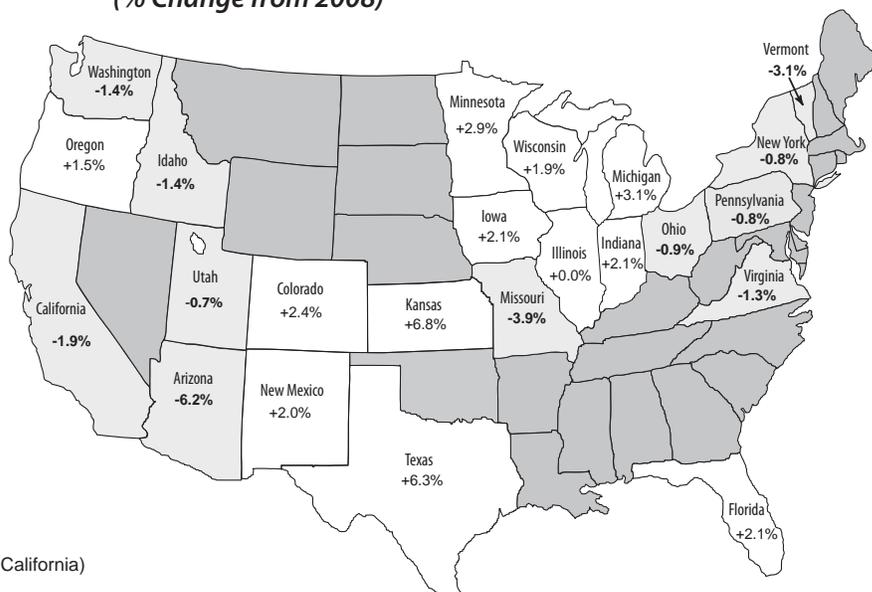
Commodity Prices Used in the Calculation of California Class 1 Milk Prices

Month	Chicago Mercantile Exchange		California Manufacturing Plants	Dairy Market News
	Grade AA Butter	Block Cheddar Cheese	Nonfat Dry Milk	Western Dry Whey
<i>Dollars per Pound</i>				
Jan.	\$1.1275	\$1.1178	\$0.8146	\$0.1500
Feb.	\$1.1008	\$1.1456	\$0.8106	\$0.1488
Mar.	\$1.1594	\$1.1900	\$0.8036	\$0.1644
Apr.	\$1.1870	\$1.2723	\$0.8069	\$0.2150
May	\$1.2313	\$1.1503	\$0.8084	\$0.2488
June	\$1.2550	\$1.1483	\$0.8212	\$0.2825
July				
Aug.				
Sept.				
Oct.				
Nov.				
Dec.				

May Milk Production in the Top 23 States (% Change from 2008)

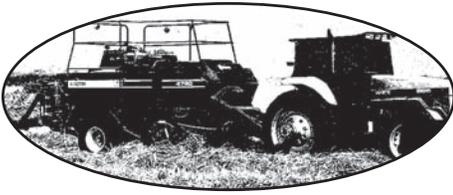
For the U.S. overall, comparing May 2009 to May 2008:

- U.S. Milk production during May was up 0.1%
- The number of cows on farms was 9.275 million head, down 43,000 head
- Production per cow averaged 1,804 pounds, 11 pounds more than May 2008
- Eleven of the top twenty-three milk producing states showed a decrease in milk production



As reported by USDA and CDFA (for California)

Premium Alfalfa Hay Prices / Alfalfa Sales - Reported Weekly



Alfalfa Hay Update

Northern California: Producers were waiting for breaks in the unstable weather to get their hay laid down before the desired quality was lost.

Southern California: Premium and Supreme Alfalfa have not been tested this month, while demand was moderate to good, with no new supplies. Retail and stable hay steady to weak. Exporters interested in Sudan hay.

Premium Alfalfa Hay Statewide Average Prices Per Ton / Total Tons Sold or Delivered

Area	May 29	June 5	June 12	June 19	Monthly Low/High
Petaluma	N/A	\$150	N/A	N/A	\$150
North Valley ¹	\$130-145	\$130-148	\$130-145	\$130-150	\$130-150
South Valley ²	\$130-157	\$142-160	\$135-155	\$138-156	\$130-160
Chino Valley	N/A	\$143-155	\$150-155	N/A	\$143-155
Tons Sold³	69,488	75,500	56,051	46,645	
Tons Delivered⁴	39,075	38,822	38,728	21,100	

¹ North Valley is Escalon, Modesto and Turlock areas.

² South Valley is Tulare, Visalia and Hanford areas.

³ For current or future delivery.

⁴ Contracted or current sales.

Definition of premium Alfalfa Hay: Early maturity, i.e., pre-bloom in legumes and pre head in grass hays, extra leafy and fine stemmed-factors indicative of a high nutritive content. Hay is green and free of damage.

Source: USDA Market News, Moses Lake, Washington, (509) 765-3611, www.ams.usda.gov/LSMarketNews

California Weekly Feed Commodity Spot Prices, Delivered to the Dairy

AREA	Almond Hulls	Canola	Distillers Dried Grains	Rolled Corn	Soybean Meal	Whole Cottonseed
Tulare/Pixley						
May 26	\$90.00	\$349.00	\$219.00	\$195.50	\$451.00	\$380.00
Jun. 2	\$90.00	N/A	\$224.00	\$203.00	\$451.00	\$385.00
Jun. 9	\$90.00	N/A	\$212.00	\$201.00	\$473.00	\$375.00
Jun. 16	\$90.00	\$389.00	\$196.00	\$188.00	\$470.00	\$370.00
Jun. 23	\$90.00	\$365.00	\$182.00	\$184.00	\$451.00	\$355.00
Monthly Average	\$90.00	\$367.67	\$206.60	\$194.30	\$459.20	\$373.00
North Valley						
May 26	\$86.00	\$349.00	\$219.00	\$204.50	\$451.00	\$380.00
Jun. 2	\$86.00	N/A	\$224.00	\$212.00	\$451.00	\$385.00
Jun. 9	\$86.00	N/A	\$212.00	\$210.00	\$473.00	\$375.00
Jun. 16	\$86.00	\$389.00	\$196.00	\$197.00	\$470.00	\$375.00
Jun. 23	\$86.00	\$365.00	\$182.00	\$193.00	\$451.00	\$355.00
Monthly Average	\$86.00	\$367.67	\$206.60	\$203.30	\$459.20	\$374.00
Los Banos/Chowchilla						
May 26	\$88.00	\$351.00	\$221.00	\$200.50	\$453.00	\$382.00
Jun. 2	\$88.00	N/A	\$226.00	\$208.00	\$453.00	\$387.00
Jun. 9	\$88.00	N/A	\$215.00	\$206.00	\$475.00	\$377.00
Jun. 16	\$88.00	\$391.00	\$199.00	\$193.00	\$472.00	\$372.00
Jun. 23	\$88.00	\$367.00	\$185.00	\$189.00	\$453.00	\$355.00
Monthly Average	\$88.00	\$369.66	\$209.20	\$199.30	\$461.20	\$374.60

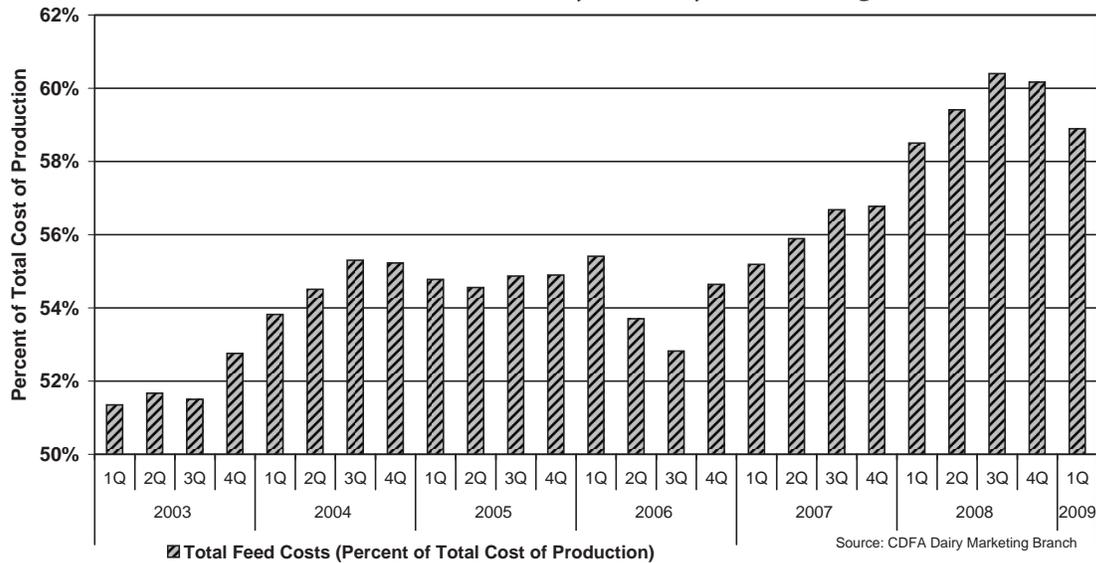
Milk Production Cost Comparison Summary for California *

By Quarter, 2008-2009

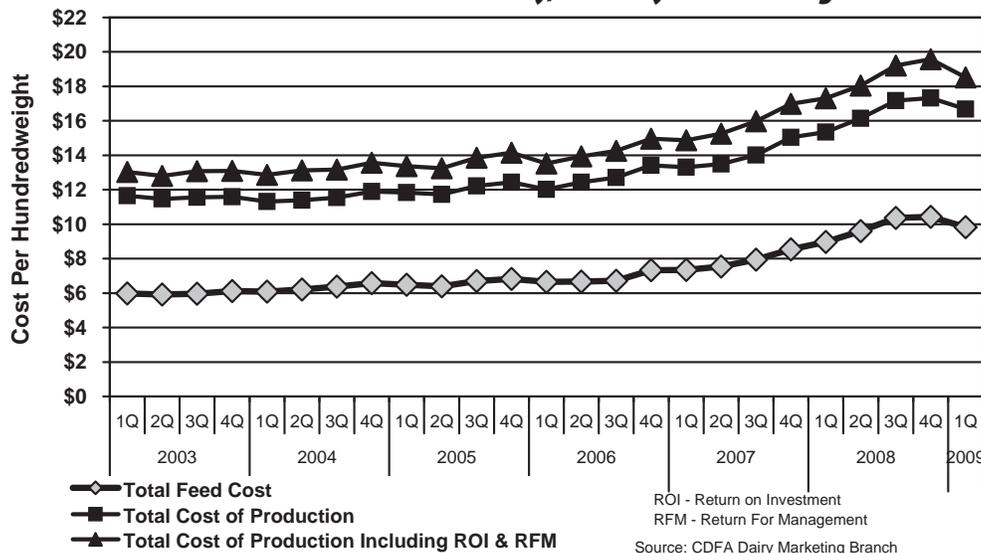
Quarter	North Coast		North Valley		South Valley		Southern California		Statewide Weighted Average	
	2008	2009	2008	2009	2008	2009	2008	2009	2008	2009
<i>Dollars per Hundredweight</i>										
1st Quarter										
Total Costs	19.74	22.38	15.14	16.63	15.31	16.63	15.44	15.35	15.34	16.67
Total Costs & Allowances*	21.97	24.77	16.98	18.23	17.17	18.58	17.07	17.29	17.31	18.51
2nd Quarter										
Total Costs	18.49		15.86		16.26		16.06		16.14	
Total Costs & Allowances*	20.62		17.76		18.16		17.69		18.04	
3rd Quarter										
Total Costs	20.52		16.68		17.38		17.13		17.17	
Total Costs & Allowances*	22.74		18.67		19.46		18.93		19.21	
4th Quarter										
Total Costs	22.08		17.08		17.39		16.62		17.33	
Total Costs & Allowances*	24.71		19.32		19.65		18.56		19.58	

* Includes an allowance for management and a return on investment

Total Feed Costs (Percent of Total Cost of Production) Based on California Production Cost Survey, January 2003 through March 2009

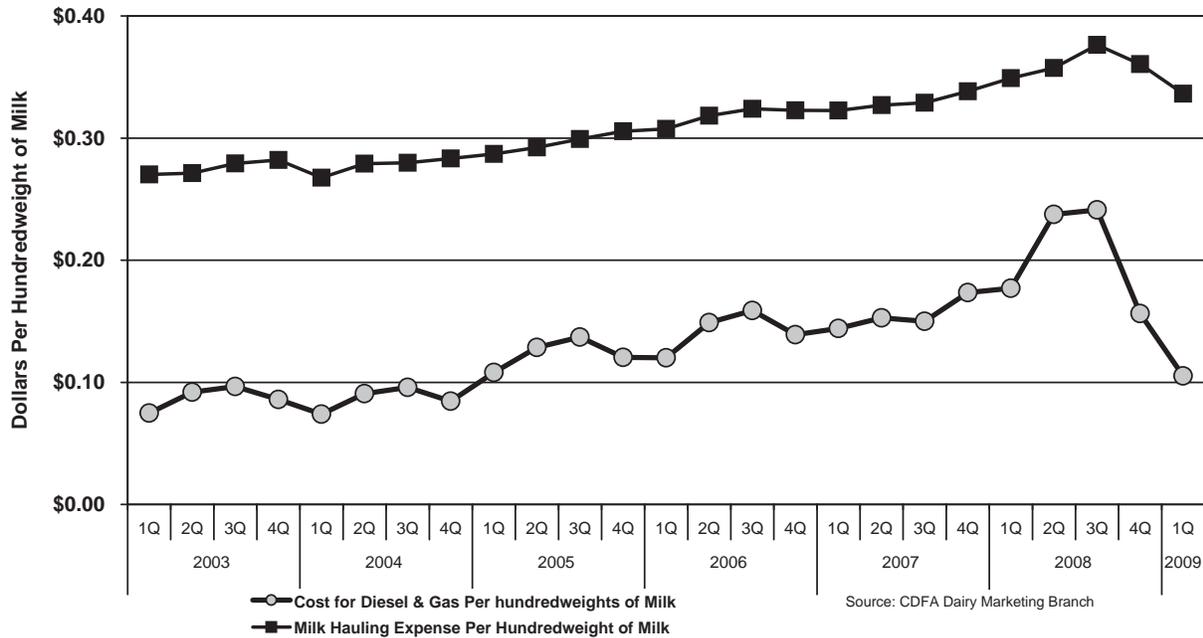


California Cost of Production, Total Feed Cost, by Quarter Based on California Production Cost Survey, January 2003 through March 2009





Diesel, Gas, and Milk Hauling Costs, Per Hundredweight of Milk Based on California Production Cost Survey, January 2003 through March 2009



USDA Milk-Feed Price Ratio

The May Milk Feed Price Ratio was 1.47, compared to a year ago, when it was 1.81, indicating higher profitability was experienced in 2008.

The May ratio reflects a \$0.20 decrease in the all-milk price — from \$11.90 to \$11.70 per hundredweight. One year ago the all-milk price used to calculate the ratio was \$18.30 per hundredweight.

The May ratio reflects a gain in feed cost and decrease in milk prices. Alfalfa hay increased from \$133 to \$138 per ton, down from \$180 per ton in May 2008. Soybeans increased \$1.01, from \$9.79 to \$10.80 per bushel. The corn price used to calculate the May ratio was \$4.08 per bushel, up 23 cents from April.

A ratio of 1.47 means that a dairy producer can buy 1.47 pounds of feed for every pound of milk sold. Whenever the ratio meets or exceeds 3.0, it is considered profitable to buy feed and produce milk.

Corn Crop Progressing

The “Crop Progress” report from the USDA shows corn fields in the top 18 corn-growing states are doing better than they were last year at this time.

As of June, 70 percent of the crop was rated in “good” to “excellent” condition, according to the report. Last year at this time, 57 percent of the crop rated “good” to “excellent.” Crop conditions are about the same as the previous weeks.

Soybeans, at 87 percent planted, are slightly ahead of one year ago, when farmers had 83 percent of the crop in the ground. The percent planted as of June 14 is catching up to the five-year average of 92 percent. Seventy-two percent of the crop has emerged, down versus the five-year average of 83 percent.

NMPF Strategic Planning Task Force

Initial Meeting Focuses on Short-Term Solutions to Milk Price Woes

As reported by the National Milk Producers Federation

In response to the current economic milk price crisis affecting dairy farmers across the country, the National Milk Producers Federation (NMPF) has formed a Strategic Planning Task Force to focus on short-term solutions and establish an aggressive schedule for addressing longer-term solutions.

The Task Force has voted to recommend to the CWT Committee and the NMPF Board of Directors to direct any available CWT funds to assist CWT members in utilizing the Dairy Export Incentive Program (DEIP) to its fullest extent. DEIP has the potential to export the equivalent of more than 1.5 billion pounds of milk. The NMPF Board of Directors approved the recommendation and directed CWT management to work with CWT members to facilitate.

While CWT's Export Assistance program isn't meant to replace the use of the DEIP, "we've always seen it as a complement to the role of DEIP, and so we are willing to utilize specially-designated CWT funds to help expedite the use of the government's resources to help remove one percent of the nation's dairy production through DEIP," said Jerry Kozak, President and CEO of NMPF.

Kozak said that this measure, spurred on by the Task Force, will further aid efforts to correct the supply-demand imbalance at the heart of the financial hardship being faced by thousands of American dairy farm families. In a separate action, CWT is currently in the middle of removing more than 100,000 cows equivalent to two billion pounds of milk in the largest-ever herd retirement in its six-year history.

To address longer-term factors affecting price and volatility, the Task Force will next meet in Chicago with representatives from major dairy producer organizations across the nation that are proposing programs to resolve the crisis.

The Task Force will engage in a detailed dialogue with these groups "to determine the economic and political feasibility of those plans, with the goal of achieving

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Bovine TB Confirmed in Texas Dairy Herd

Test results from the National Veterinary Services Laboratory in Ames, Iowa, recently confirmed that bovine tuberculosis is present on a Texas dairy farm. The dairy operation has been quarantined since April while test results were pending.

The herd will remain under quarantine, explains Bob Hillman, Texas state veterinarian and head of the Texas Animal Health Commission. The next step is to decide whether to depopulate the herd or begin a test-and-removal program.

Meanwhile, dairies that have had epidemiological contact with the infected herd via calves, heifers or cows will also be tested for bovine TB.

Texas currently has bovine TB-free status, but that could change if additional herds are found to be infected within 24 months.

BSE Found in Canadian Dairy Cow

Canadian Food Inspection Agency (CFIA) officials announced that they had found bovine spongiform encephalopathy (BSE) in a six-and-a-half-year-old dairy cow.

The CFIA said that no part of the animal had entered the food chain for animals or humans. The agency identified the animal's place of birth and an investigation is in progress.

This cow would have been born in 2002, making it the 10th BSE-positive cow in Canada young enough to be exported to the United States.

CWT Audits of Dairies Underway

Excerpt from CWT Website Article

Auditing of the dairies selected for the latest herd retirement round should be completed by early July and the cows should begin moving off dairies in late May. All bidders will have been notified in June as to whether their bid was among those accepted.

Successful bidders will be paid in two installments: 90% of the amount bid times the producer's 12 months of milk production when it is verified that all cows have gone to slaughter, and the remaining 10% plus interest at the end of 12 months following the farm audit, if both the producer and his/her dairy facility – whether owned or leased – did not become involved in the commercial production and marketing of milk during that period.

"The bids selected ranged from farms with fewer than 50 cows to dairies with over 5,000, demonstrating that farms of all sizes in all areas are facing a very difficult year in 2009," Kozak said. "Those that took advantage of CWT's offer to retire their herds will aid others still wanting to farm by reducing the amount of milk coming to market and strengthening prices going forward."

Thanks to the commitment of 36 cooperative members and hundreds of individual dairy farmer members, CWT has the resources to carry out additional herd retirements in the coming months. Because of this, CWT will not announce the average dollar per hundredweight

level of the bids accepted in this or future rounds until all the herd retirements CWT has planned are completed.

Watch for news on upcoming task force (See related story on Page 1) - The National Milk Producers Federation (NMPF), in response to the ongoing economic challenges facing the dairy farmers has created a special strategic task force to examine those challenges and develop possible short-term and long-term solutions. The purpose of the task force is to build consensus across the dairy industry about not only the nature of the causes affecting producer prices and ways the industry can realistically work to address the current economic storm, but also how to reduce dairy price volatility in the years ahead. The task force's goal will be to achieve a common understanding of how to best tackle the twin problems of low milk prices and high input costs. A key part of the task force's agenda will be an examination of how CWT could be modified in addressing not only dairy supply and demand issues, but also looking at how, as a marketing agency in common, CWT can address producer revenue issues more directly. The task force will also look at the viability of CWT creating incentives to stimulate the domestic production of new products, such as casein; expanding on the success of the CWT export assistance program to create new markets for U.S. milk; and an assessment of methods to implement milk production controls.

Region	Northeast	Southeast	Midwest	Southwest	West	Total
Total Bids Received	69	72	178	89	127	535
Total Bids Accepted	42	56	134	68	88	388
Total Cows Offered	7,287	8,954	11,754	62,221	71,591	161,807
Total Cows Accepted	5,156	7,042	8,595	43,607	38,498	102,898
Total Milk Offered	139.5 million pounds	145.7 million pounds	208.0 million pounds	1.13 billion pounds	1.34 billion pounds	2.96 billion pounds
Total Milk Accepted	104.7 million pounds	117.3 million pounds	154.1 million pounds	862.8 million pounds	761.1 million pounds	2.0 billion pounds
% Milk Accepted	5%	6%	8%	43%	38%	100%
% Cows Accepted	5%	7%	8%	42%	37%	100%
States in each region	CT, DE, ME, MA, MD, NH, NJ, NY, PA, RI, VT	AL, AR, GA, KY, LA, MO, MS, NC, SC, TN, VA, WV	IL, IN, IA, MI, MN, ND, OH, SD, WI	AZ, CO, KS, NE, NM, OK, TX	CA, ID, MT, NV, OR, UT, WA, WY	

Two New Milk Drinks For the Consumer . . .

Attitude Drinks Inc. is launching two new unique and innovative milk drinks for consumers targeted for drinking after exercise and for metabolic health.

Phase III "Recovery" is an exercise-recovery solution that is based on scientific evidence and focuses on delivering the most effective protein to carbohydrate ratio in addition to measured levels of recovery stimulating vitamins and minerals.

Just! Metabolic Health targets consumers interested in achieving improved metabolic health, such as weight management and heart health. This beverage has been formulated using ingredients naturally found in milk to deliver features proven health benefits of fat burn and reduction of oxidative and inflammatory heart stress.

Both of these new beverages will be packaged in eco-friendly convenient re-sealable bottles containing shelf stable 14.5 oz. and 8 oz. sizes. Attitude Drinks Inc. is an innovative, beverage brand development and marketing company with a focus on introducing healthy, scientifically advanced functional beverages.

Antibiotics Bill Defeated

SB 416 that would have limited the use of antibiotics by licensed veterinarians to prevent and control disease in animal agriculture was defeated by the California Senate Wednesday afternoon. Fifteen Senators voted in favor of the bill and 20 voted against it.

SB416 would have required all school districts in California to make every effort to purchase poultry and meat products that had not been treated with non-therapeutic antibiotics.

The original bill prohibited schools from serving poultry or meat products from animals that had been treated with antibiotics at any time during the life of the animal.

Water Crisis Threatening Feed Supplies

The water crisis in California continues to look bleak and some farmers have been forced to fallow their land due to a lack of water. This is the third year that California has faced a drought situation, with this year complicated due to a court case victory to protect Delta Smelt. Smelt are a small 2-inch fish that lives in the Sacramento-San Joaquin River Delta. These small fish run the risk of being sucked into pumps and killed when water is pumped from the Delta to the rest of the state.

The lack of water could impact dairy feed availability from a short supply to nonexistent by this fall, says Tom Barcellos, a dairy producer from Tipton, Calif., who farms more than 1,800 acres. Barcellos says that farmers who grow corn and sell it to dairy producers are already leery because the prices for corn are 50 to 60 percent of last year's. Add on top of that the increasing expense for water if it is available to them. In some cases, Barcellos says farmers may plant Sudan or Milo as an alternative to corn. Milo and Sudan can handle the stress of little to no water.

California's Water Worries Continue . . .

A biological opinion by the National Marine Fisheries Service has added to water worries of farmers in California. Federal biologists and hydrologists have concluded that current water pumping operations should be altered to ensure survival of winter and spring-run Chinook salmon, steelhead, sturgeon and killer whales – that rely on salmon for food.

"This federal biological opinion puts fish above the needs of millions of Californians and the health and security of the world's eighth largest economy," says California Governor Arnold Schwarzenegger.

According to an article in Ag Alert, the opinion calls for several actions, such as increasing water storage, regulating river flow rates and slowing water-transferring pumps in the Sacramento-San Joaquin Delta to a greater degree.

Should the directives be put in place, water available to cities and farms south of the delta would be reduced by 300,000 to 500,000 acre-feet. This is a drop of 5 percent to 7 percent from water deliveries that are already low due to a court ruling to protect delta smelt. Hundreds of thousands of acres have already been left fallow in California due to the lack of water caused by this court order.

National Dairy Situation and Outlook – USDA Estimates

Milk Production

Monthly: Compared to May 2008, the overall milk production across the U.S. was up 0.1% in May 2009; largest increase was reported by Kansas at 6.8% growth in milk production. USDA reports that California milk production was down 1.9% compared to May 2008. Among other western states, Arizona was down 6.2%; New Mexico was up 2.0%; and Washington was down 1.4%. Five of the top 10 states reported a production decrease.

Quarterly: For the first quarter of 2009 compared to the fourth quarter of 2008, U.S. milk cow numbers dropped to 9.297 million, milk production per cow increased to 5,093 pounds; the net effect was increased milk production to 47.4 billion pounds. USDA projects that for the second quarter of 2009 compared to the first quarter of 2009, U.S. milk cow numbers will decrease to 9.240 million cows, production per cow will increase to 5,255 pounds; the net effect would be increased milk production to 48.6 billion pounds.

Milk Prices

Comparing the first quarter of 2009 to the fourth quarter of 2008, U.S. average milk prices decreased to \$12.23/cwt. USDA projects that for the second quarter of 2009, U.S. average all-milk prices will be \$11.55-11.75/cwt.; Class 4b prices will be \$10.10-10.30/cwt.; and Class 4a prices will be \$9.97-10.27/cwt.

Utility Cow Prices

Comparing the first quarter of 2009 to the fourth quarter of 2008, average U.S. utility cow prices were down \$0.28/cwt. to a national average of \$46.42/cwt. USDA projects that utility cow prices will average \$48-49/cwt. in the second quarter of 2009.

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

DEIP - Continued from Page 1

of these products take full advantage of the allocations that are offered through June 30, 2009.

CDFA is supportive of any action that can be taken by USDA to extend the program through the next fiscal year.

Task Force - Continued from Page 6

common understanding of how best to tackle the problems of low milk prices and high input costs," Kozak said.

Letters of invitation have already been sent to the producer organizations asking them to be prepared to discuss a number of proposals concerning both supply and demand.

"There was no single reason why dairy farmers have found themselves in this plight so the Task Force will focus on developing a portfolio of solutions to ensure that we can avoid such circumstances in the future," said Kozak.

Pool Prices

Month	Quota	Overbase
December '07	\$20.79	\$19.09
January '08	\$19.14	\$17.44
February	\$18.42	\$16.72
March	\$17.71	\$16.01
April	\$17.56	\$15.86
May	\$18.47	\$16.77
June	\$19.12	\$17.42
July	\$19.05	\$17.35
August	\$18.01	\$16.31
September	\$17.92	\$16.22
October	\$17.14	\$15.44
November	\$15.97	\$14.27
December	\$14.11	\$12.41
January '09	\$12.10	\$10.40
February	\$11.28	\$ 9.58
March	\$11.54	\$ 9.84
April	\$11.57	\$ 9.87
May	\$11.46	\$ 9.76

Milk Mailbox Prices

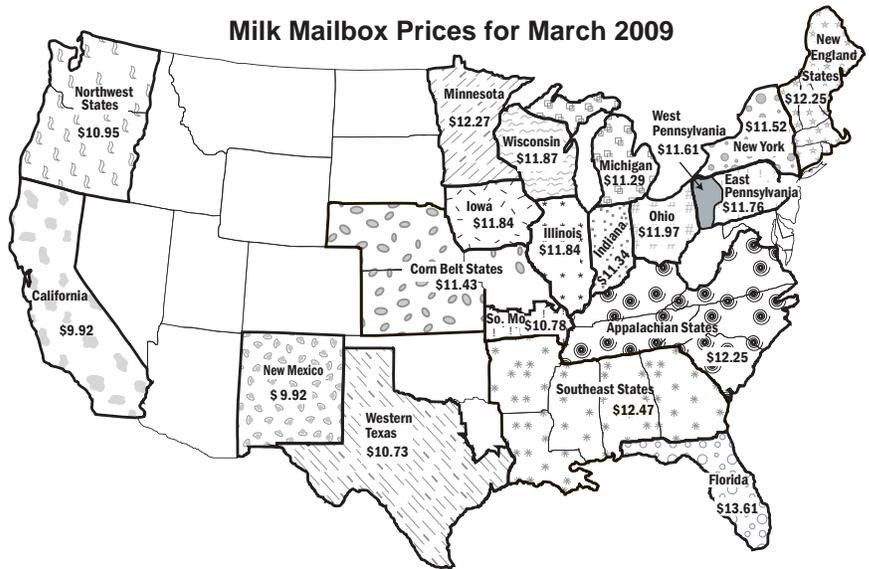
Milk Mailbox Prices in Dollars per Hundredweight

	September	October	November	December	January '09	February	March
California ¹	\$16.29	\$15.75	\$14.67	\$12.83	\$10.57	\$ 9.80	\$ 9.92
USDA ²	\$18.25	\$17.95	\$17.42	\$16.12	\$13.77	\$11.61	\$11.60

¹ California mailbox price calculated by CDFA.

² All federal milk market order weighted average, as calculated by USDA.

Milk Mailbox Prices for March 2009



In March 2009, mailbox milk prices for selected reporting areas in Federal milk orders averaged \$11.60 per cwt., down \$0.01 from the previous month average, and down \$6.41 from March 2008. The component tests of producer milk in March 2009 were: butterfat, 3.70%; protein, 3.06%; and other solids, 5.72%. On an individual reporting area basis, mailbox prices decreased in all Federal milk order reporting areas except in Wisconsin, Minnesota, Iowa, Illinois, Corn Belt States, Western Texas, and Northwest States, and ranged from \$13.61 in Florida to \$9.92 in New Mexico.



Dairy Marketing Branch:
 Phone (916) 341-5988; Fax (916) 341-6697
 Website: www.cdfa.ca.gov/dairy
 Email: dairy@cdfa.ca.gov

Milk Pricing Information:
 Within California 1-800-503-3490
 Outside California 1-916-442-MILK

The California Department of Food and Agriculture Dairy Marketing Branch publishes the California Dairy Review monthly. Please direct any comments or subscription requests to Karen Dapper at (916) 341-5988 or send an email to dairy@cdfa.ca.gov

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