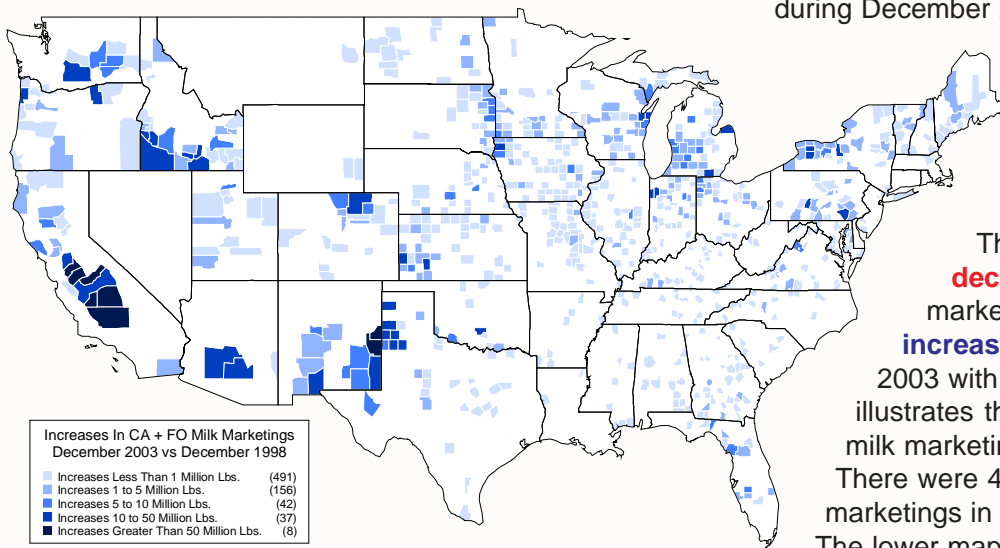


MARKETING SERVICE

B U L L E T I N

Accelerated Concentration In Top Dairy Counties

734 Counties Increased Marketings

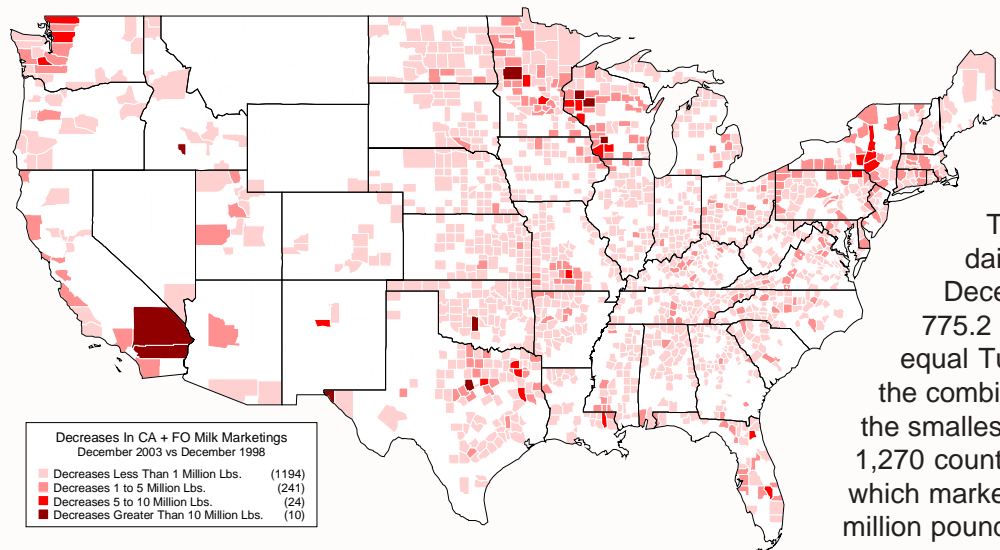


Increased concentration in the origin of milk marketings continues with 71 counties marketing 50% of the total California & Federal order milk during December 2003 -- down from 82 counties in December 1998. There were 2,005 counties with CA+FO milk marketings during December 2003, with 979 counties (48.8%) marketing less than one million pounds.

There were more counties with **decreases** in CA+FO milk marketings than counties with **increases** when comparing December 2003 with 1998. The adjacent map illustrates the 734 counties with **increased** milk marketings totaling 2.221 billion pounds. There were 45 counties which increased marketings in excess of 10 million pounds. The lower map depicts the 1,469 counties with **decreased** marketings totaling 1.200 billion pounds. Total CA+FO net milk marketings **increased** 1.021 billion pounds (8.3%) during this period.

Areas with substantial growth in milk marketings continue to influence the dairy industry. During December 2003, California milk marketings included in this analysis totaled 2.906 billion pounds. The magnitude of marketings from 27 California counties dwarfs a majority of all other counties combined. Ranking all the counties with CA+FO milk marketings in ascending order would require marketings from 1,722 counties to equal California. Not all of these 1,722 counties (85.9% of the 2,005 total) would be considered small. It includes counties marketing up to 9.477 million pounds during December 2003. At the national average milk production,

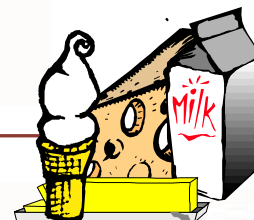
1,469 Counties Decreased Marketings



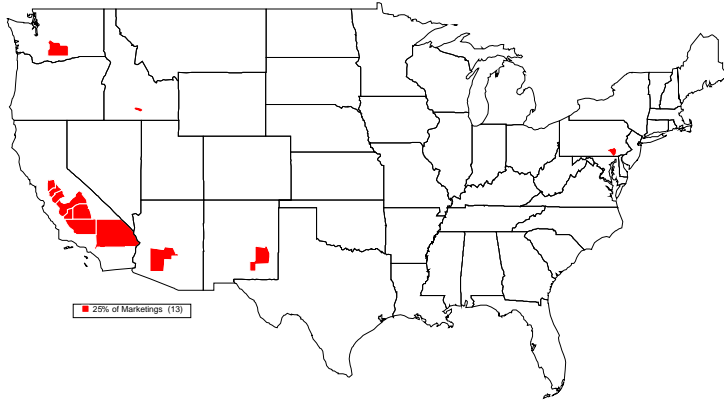
this would include counties with approximately 6,000 dairy cows. A map on the back page illustrates the counties required to equal California milk marketings. Tulare County (CA) is the largest dairy county in the U.S. with December 2003 marketings of 775.2 million pounds. Just to equal Tulare County would require the combined milk marketings from the smallest 1,270 counties or all counties which marketed less than 2.190 million pounds.

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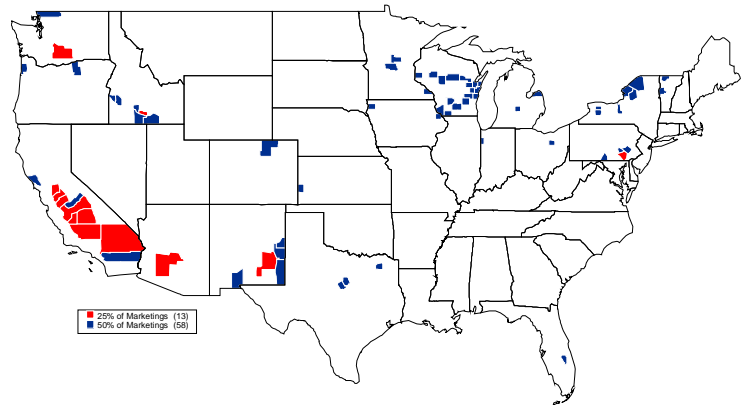
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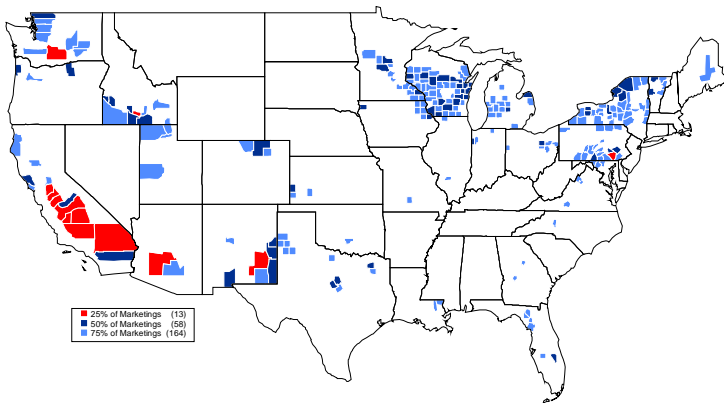
13 Counties Marketed 25% Of All
CA + Federal Order Milk During December 2003



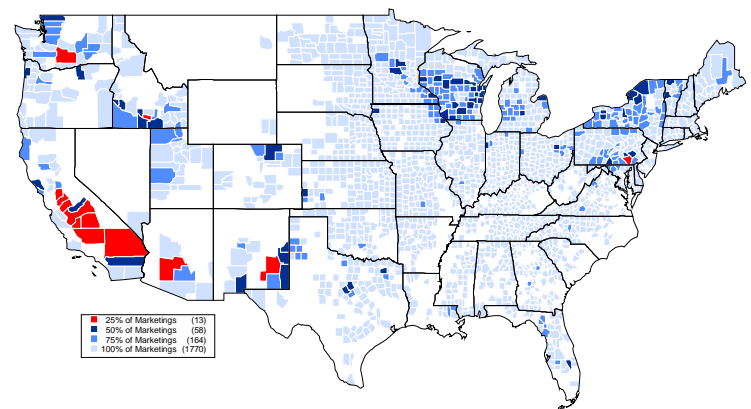
71 Counties Marketed 50% Of All
CA + Federal Order Milk During December 2003



235 Counties Marketed 75% Of All
CA + Federal Order Milk During December 2003



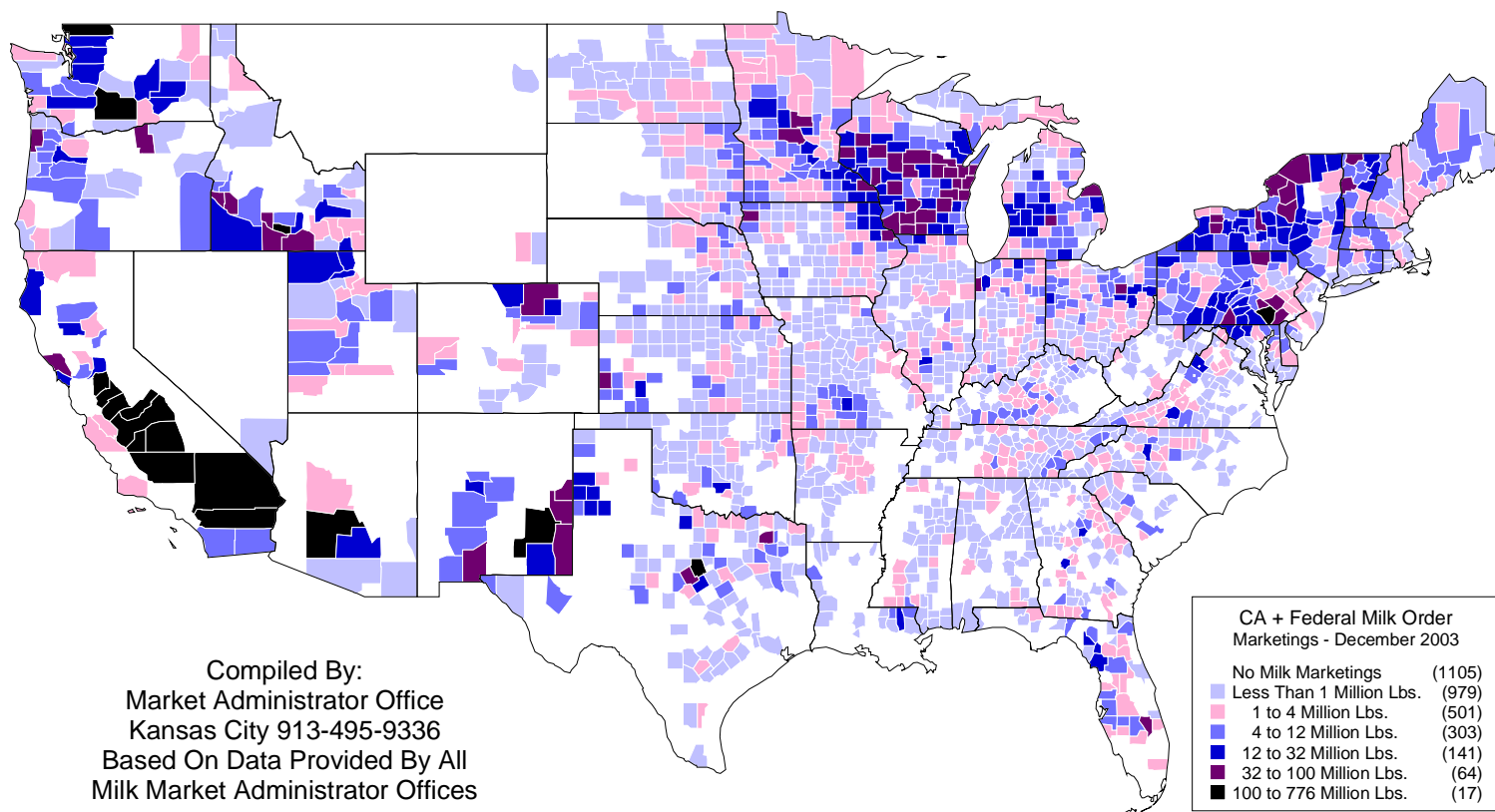
2,005 Counties Marketed 100% Of All
CA + Federal Order Milk During December 2003



13 Counties Marketed 25% Of The CA + Federal Order Milk During December 2003

	<u>Dec '03 Mktgs</u>	<u>Dec '98 Mktgs</u>	<u>Percent Change</u>	<u>Dec 2003 As % Of 12/03 Total</u>
Tulare, CA	775,235,038	535,256,289	44.83	5.83
Merced, CA	398,202,021	294,182,702	35.36	2.99
Stanislaus, CA	295,093,195	242,184,593	21.85	2.22
San Bernardino, CA	244,972,480	281,576,000	-13.00	1.84
Kiings, CA	241,398,907	188,048,382	28.37	1.82
Maricopa, AZ	221,666,675	208,773,526	6.18	1.67
Kern, CA	182,711,860	91,643,557	99.37	1.37
San Joaquin, CA	178,361,929	150,198,144	18.75	1.34
Lancaster, PA	176,549,112	161,622,648	9.24	1.33
Fresno, CA	166,460,987	131,704,762	26.39	1.25
Yakima, WA	149,782,189	114,249,941	31.10	1.13
Chaves, NM	136,427,381	128,185,231	6.43	1.03
Jerome, ID	126,777,284	103,547,891	22.43	0.95
13-County Total	3,293,639,058	2,631,173,666	25.18	24.77
CA + FO Total	13,298,618,685	12,278,053,233	8.31	

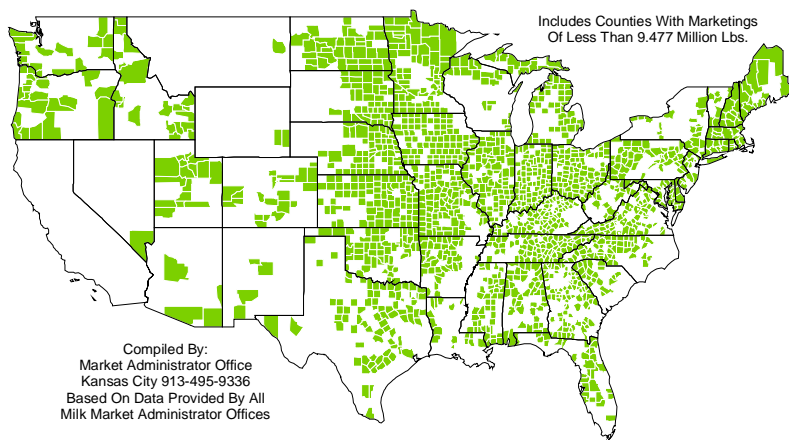
CA + Federal Order Milk Marketings By County - December 2003



Color copies of these maps are available from the Central federal order website at www.fmmacentral.com under "news & publications - marketing service bulletin."

	Statistical Uniform Price		Producer Price Differential		Class I Utilization	
	<u>2/2004</u>	<u>1/2004</u>	<u>2/2004</u>	<u>1/2004</u>	<u>2/2004</u>	<u>1/2004</u>
Pacific Northwest	12.67	12.07	0.78	0.46	28.34	30.14
Western	12.53	12.13	0.64	0.52	19.40	20.71
Arizona-Las Vegas	12.89	12.39	-----	-----	31.41	32.19
Central	12.66	12.30	0.77	0.69	29.49	30.35
Southwest	13.67	13.29	1.78	1.68	44.39	45.26
Upper Midwest	12.36	11.98	0.47	0.37	18.25	17.76
Southeast	14.23	14.02	-----	-----	58.32	62.88
Mideast	12.87	12.51	0.98	0.90	36.31	38.60
Appalachian	14.49	14.25	-----	-----	66.52	69.07
Northeast	13.95	13.58	2.06	1.97	43.56	47.39
Florida	15.48	15.54	-----	-----	81.91	86.61

Ranking Counties In Ascending Order -- December 2003
Requires 1,722 Counties To Equal California Milk Marketings



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