



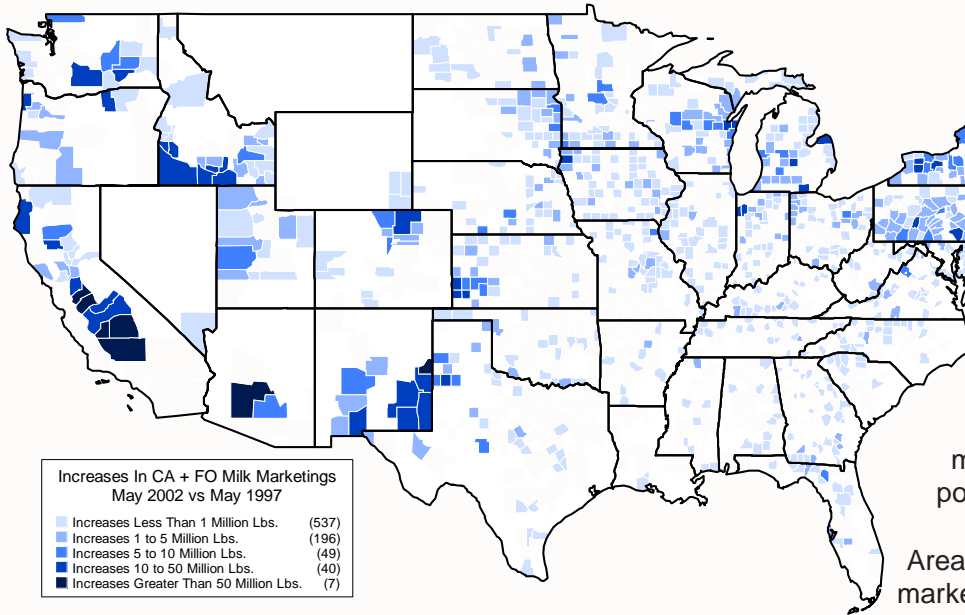
MARKETING SERVICE

B U L L E T I N

Accelerated Concentration In Top Dairy Counties

Increased concentration in the origin of milk marketings continues with 76 counties marketing 50% of the total California & Federal order milk during May 2002 -- down from 88 counties in May 1997. There were 2,059 counties with CA+FO milk marketings during May 2002, of which 958 counties (46.5%) had marketings of less than one million pounds. There were more counties with decreased FO+CA milk marketings than counties with

829 Counties Increased Marketings

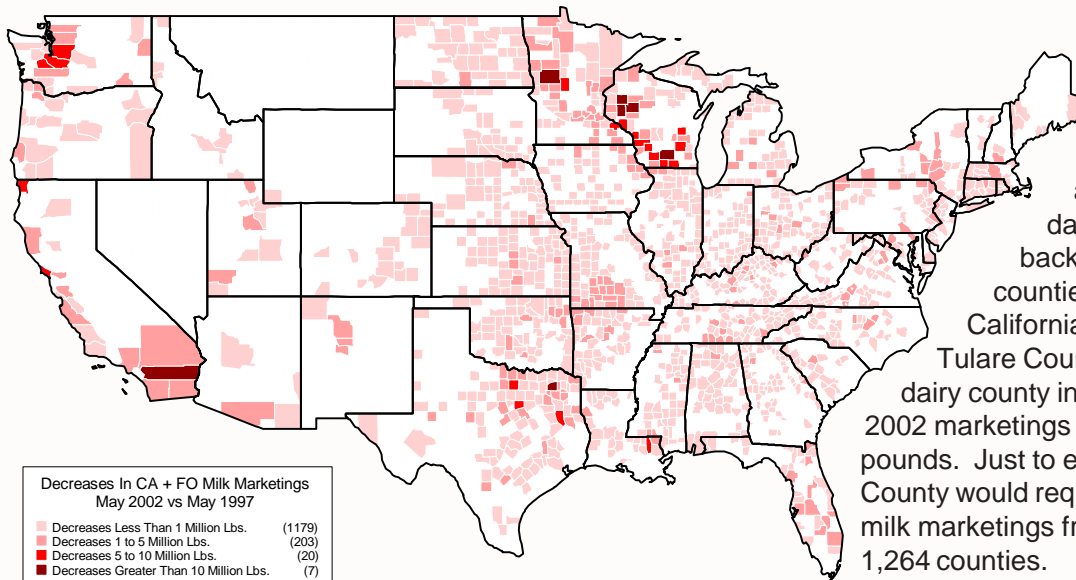


increases when comparing May 2002 with 1997. The adjacent map illustrates the 829 counties with increased milk marketings totaling 2.447 billion pounds. There were 47 counties which increased marketings in excess of 10 million pounds. The lower map depicts the 1,409 counties with decreased marketings totaling 0.958 billion pounds. Total CA+FO net milk marketings increased 1.489 billion pounds (11.8%) during this period.

Areas with substantial growth in milk marketings continue to influence the dairy industry. During May 2002, California milk marketings included in

this analysis totaled 3.057 billion pounds. The magnitude of marketings from 30 California counties dwarfs a majority of all other counties combined. Ranking all the counties with FO+CA milk marketings in ascending order would require marketings from 1,753 counties to equal California. These 1,753 counties (85.1% of the 2,059 total) are not all what some would consider small. It includes counties marketing up to 9.3

1,409 Counties Decreased Marketings



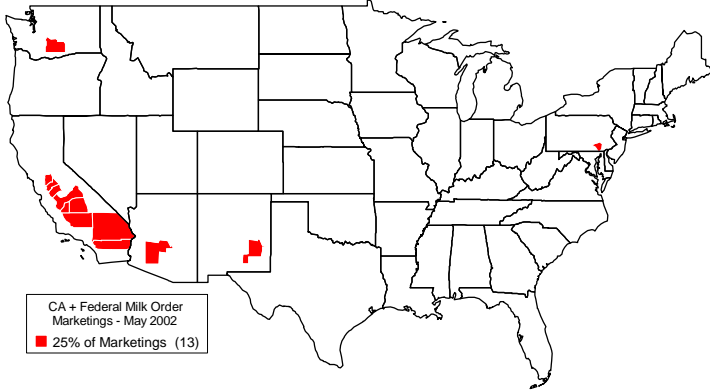
million pounds during May 2002. At the national average milk production, this would include counties with approximately 6,000 dairy cows. A map on the back page illustrates the counties required to equal California milk marketings. Tulare County (CA) is the largest dairy county in the U.S. with May 2002 marketings of 790.8 million pounds. Just to equal Tulare County would require the combined milk marketings from the smallest 1,264 counties.

S E P T E M B E R

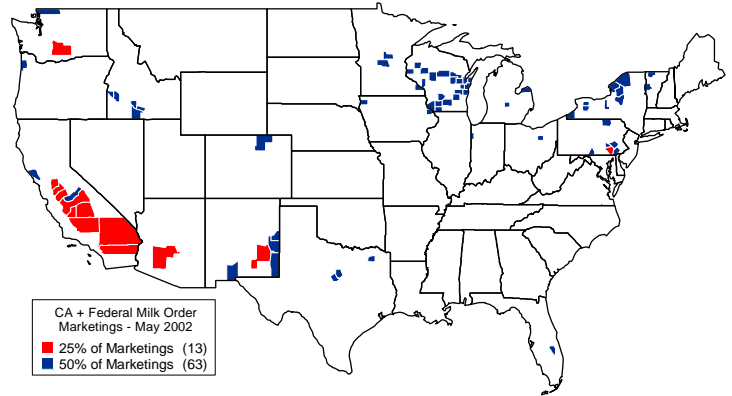
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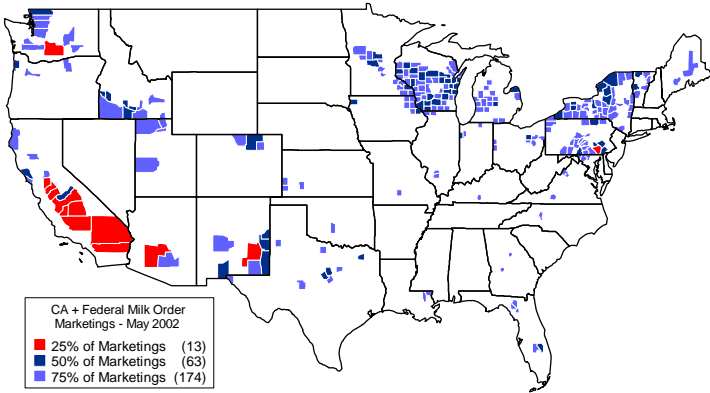
13 Counties Marketed 25% Of All
CA + Federal Order Milk During May 2002



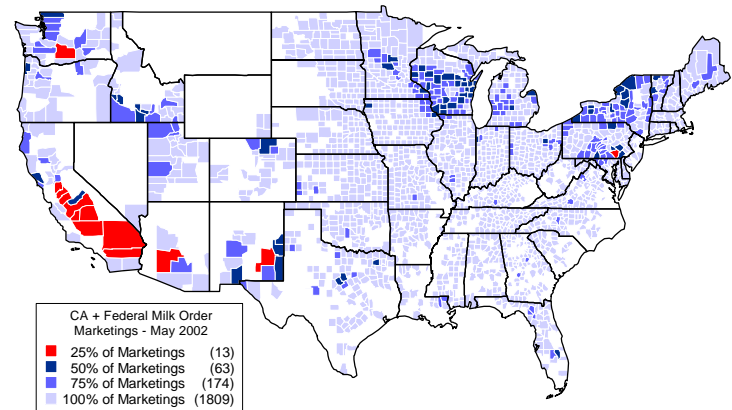
76 Counties Marketed 50% Of All
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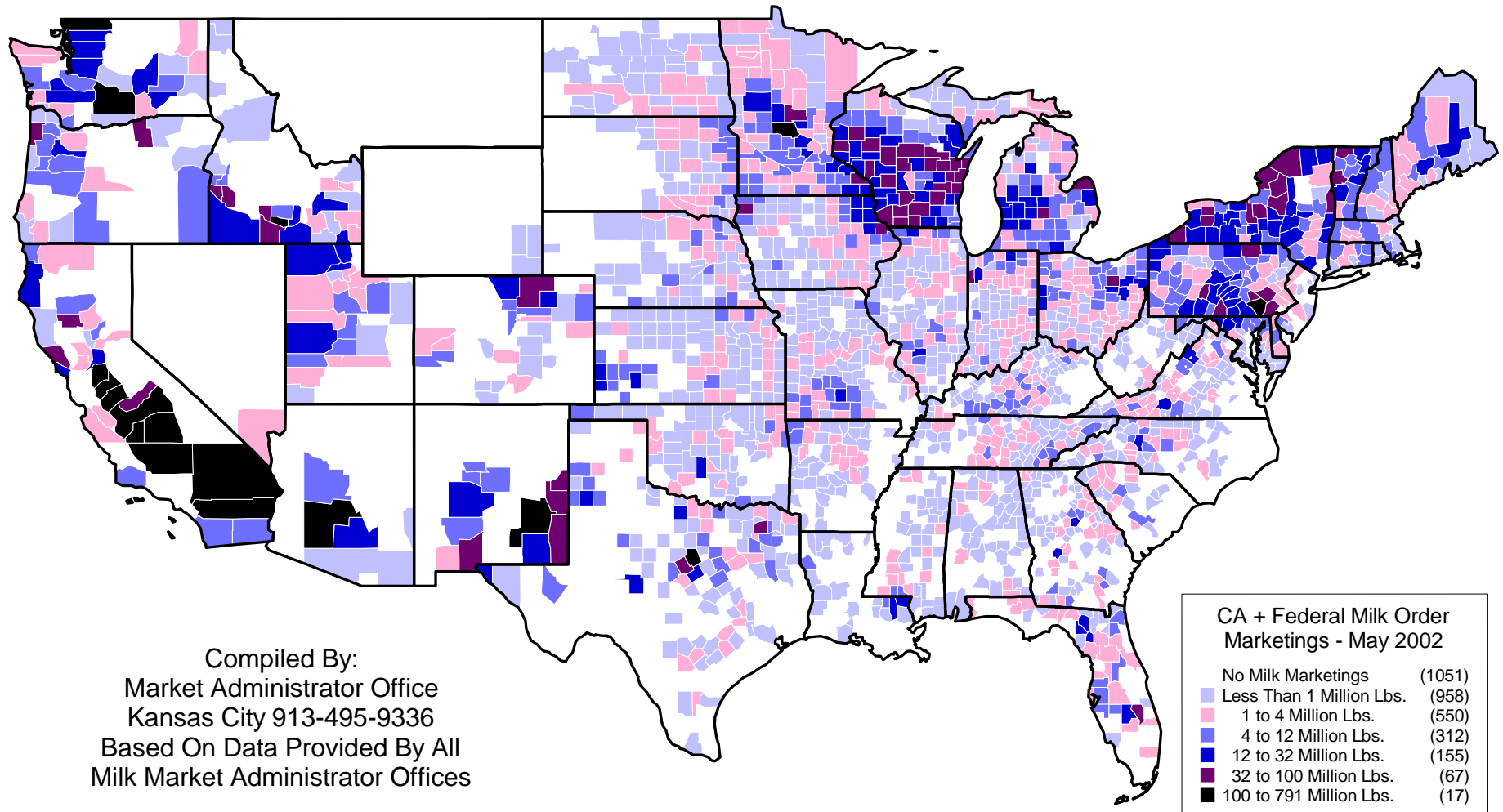
2,059 Counties Marketed 100% Of All
CA + Federal Order Milk During May 2002



13 Counties Marketed 25% Of The CA + Federal Order Milk During May 2002

	<u>May '97 Mktgs</u>	<u>May '02 Mktgs</u>	<u>Percent Change</u>	<u>May 2002 As % Of 5/02 Total</u>
Tulare, CA	498,821,654	790,805,063	+58.53	5.59
Merced, CA	298,467,475	407,447,202	+36.51	2.88
Stanislaus, CA	248,954,537	307,349,934	+23.46	2.17
San Bernardino, CA	307,829,663	306,811,013	-0.33	2.17
Maricopa, AZ	195,877,235	259,773,885	+32.62	1.84
Kings, CA	194,910,771	248,713,501	+27.60	1.76
Lancaster, PA	176,958,104	192,495,359	+8.78	1.36
Riverside, CA	201,884,384	186,053,366	-7.84	1.31
San Joaquin, CA	158,707,858	184,427,186	+16.21	1.30
Fresno, CA	135,738,383	161,595,049	+19.05	1.14
Chaves, NM	124,219,388	156,765,987	+26.20	1.11
Kern, CA	73,601,478	151,605,986	+105.98	1.07
Yakima, WA	116,114,084	142,997,699	+23.15	1.01
13-County Total	2,732,085,014	3,496,841,230	+27.99	24.71
CA + FO Total	12,663,243,555	14,152,191,197	+11.76	

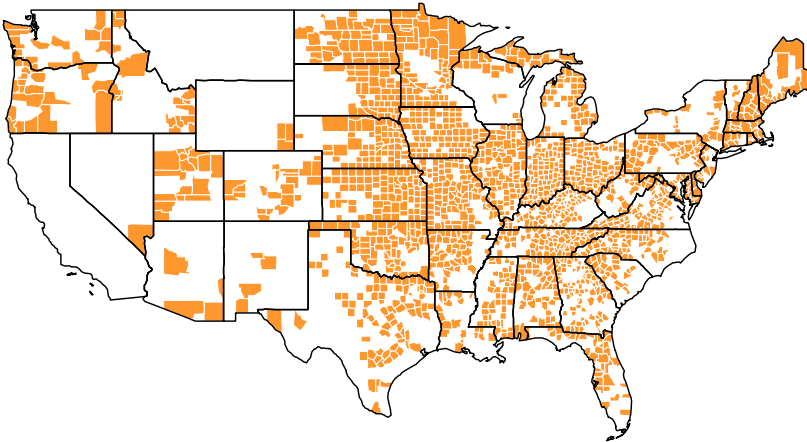
CA + Federal Order Milk Marketings By County - May 2002



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	
	8/2002	7/2002	8/2002	7/2002	8/2002	7/2002
Pacific Northwest	10.66	10.66	1.12	1.33	26.34	25.55
Western	10.35	10.26	0.81	0.93	21.50	20.57
Arizona-Las Vegas	11.04	10.87	-----	-----	35.60	32.44
Central	10.58	10.44	1.04	1.11	27.02	24.38
Southwest	11.95	11.81	2.41	2.48	45.01	39.26
Upper Midwest	10.20	10.13	0.66	0.80	19.90	21.24
Southeast	12.63	12.55	-----	-----	67.28	62.60
Mideast	11.19	10.85	1.65	1.52	41.61	36.57
Appalachian	12.87	12.88	-----	-----	72.52	69.57
Northeast	12.16	12.05	2.62	2.72	43.26	39.40
Florida	14.19	14.19	-----	-----	91.98	90.14

Ranking Counties In Ascending Order -- May 2002
Requires 1,753 Counties To Equal California Milk Marketings



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