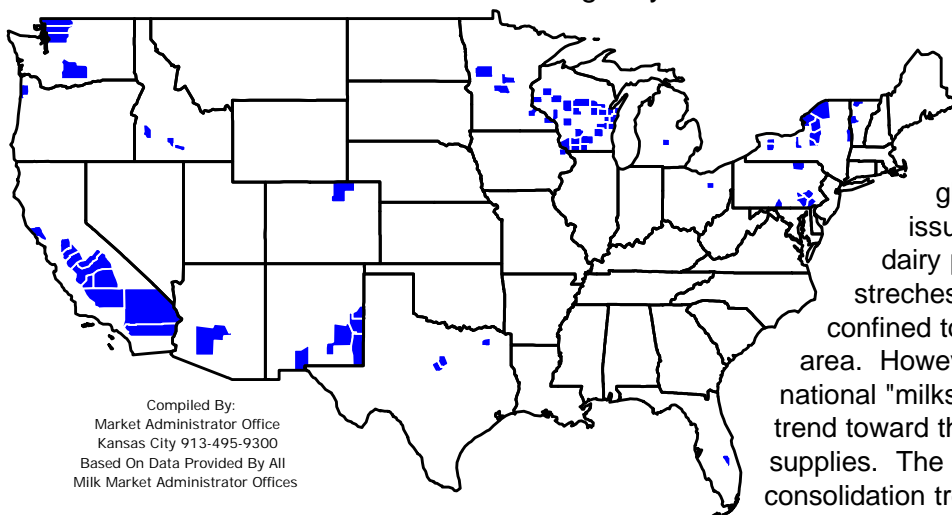


MARKETING SERVICE

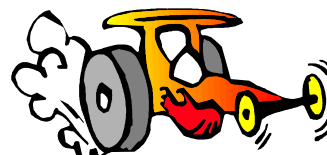
B U L L E T I N

Accelerated Concentration In Top Dairy Counties

79 Counties Marketed 50% Of All
CA + Federal Order Milk During May 2000



Compiled By:
Market Administrator Office
Kansas City 913-495-9300
Based On Data Provided By All
Milk Market Administrator Offices



U.S. milk marketings are indeed national in scope as illustrated by the milk marketing density map shown on page three. At a glance, the map supports the issue that the "well-being" of the dairy producer and industry stretches across the U.S. and is not confined to any one specific geographic area. However one aspect hidden in this national "milkshed" picture is a continued trend toward the concentration of milk supplies. The general agricultural consolidation trend toward fewer and larger farms becomes much more apparent within

the dairy industry by examining where a majority of milk marketings originate. Data for these maps were tabulated based on federal order and California milk marketings per county which were provided by all market administrator offices and the California dairy marketing branch.

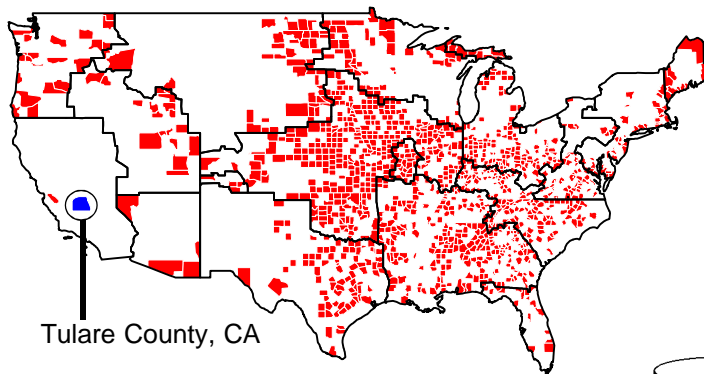
Milk marketings from 79 counties accounted for 50 percent of the total California and federal order milk marketings during May 2000. These counties are illustrated by the above map. The table below illustrates the number of counties which account for 50 percent have also become a statistic of concentration. Just five years earlier, milk from 119 counties accounted for 50 percent of the total milk marketings. The four maps at the top of page two provide a more detailed view of these data based on marketings by county as a percent of the federal order and California total. There were 2,094 counties with milk marketings during May 2000. The top 14 counties accounted for 25 percent of the marketings. The 79 counties depicted here accounted for 50 percent, while 255 counties represented 75 percent of the total.

In Comparison....

5/96 = 119 Counties
5/97 = 88 Counties
5/98 = 85 Counties
5/99 = 81 Counties
5/00 = 79 Counties

The sheer size in marketings from some of the larger counties is illustrated by the map below. Tulare County California marketed more milk than any other county with 655 million pounds in May 2000. The cumulative federal order and California marketings from 1,231 counties (smallest & up) were required to equal the marketings from Tulare County. This comparison points out the growing disparity between so-called "mega-farms" located in concentrated geographic areas and "traditional-farms" spread throughout the rest of the country.

CA + Federal Order Milk Marketings By County - May 2000



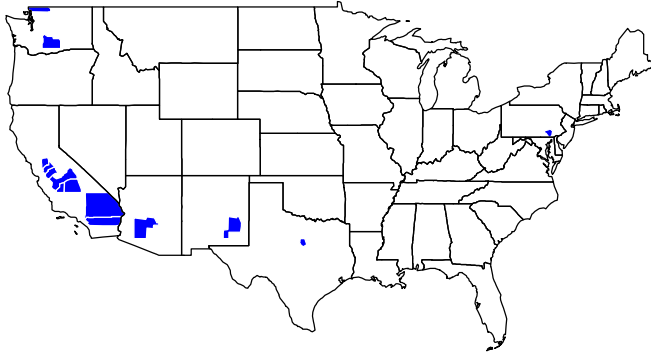
Tulare County, CA

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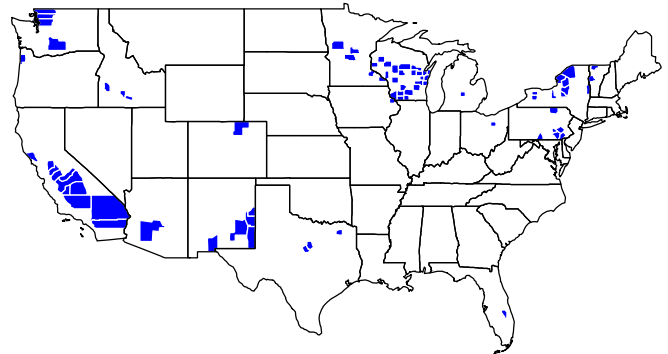
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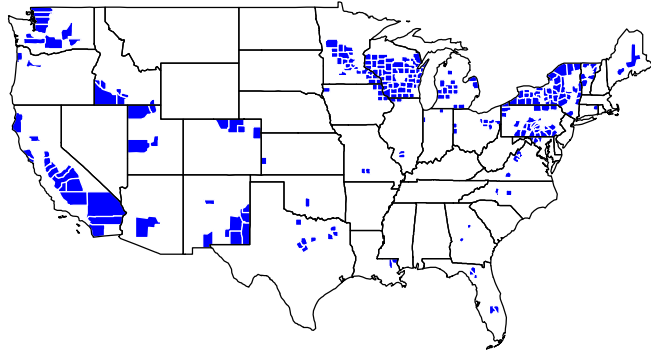
14 Counties Marketed 25% Of All
CA + Federal Order Milk During May 2000



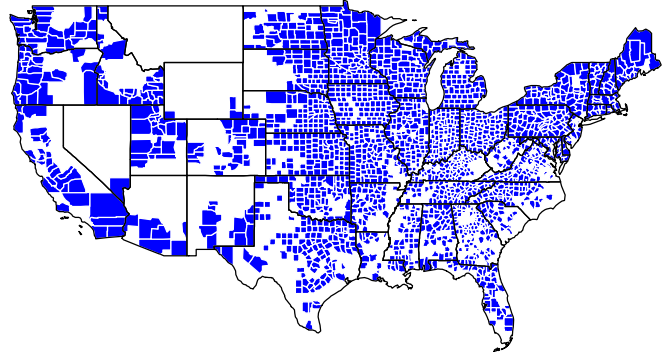
79 Counties Marketed 50% Of All
CA + Federal Order Milk During May 2000



255 Counties Marketed 75% Of All
CA + Federal Order Milk During May 2000



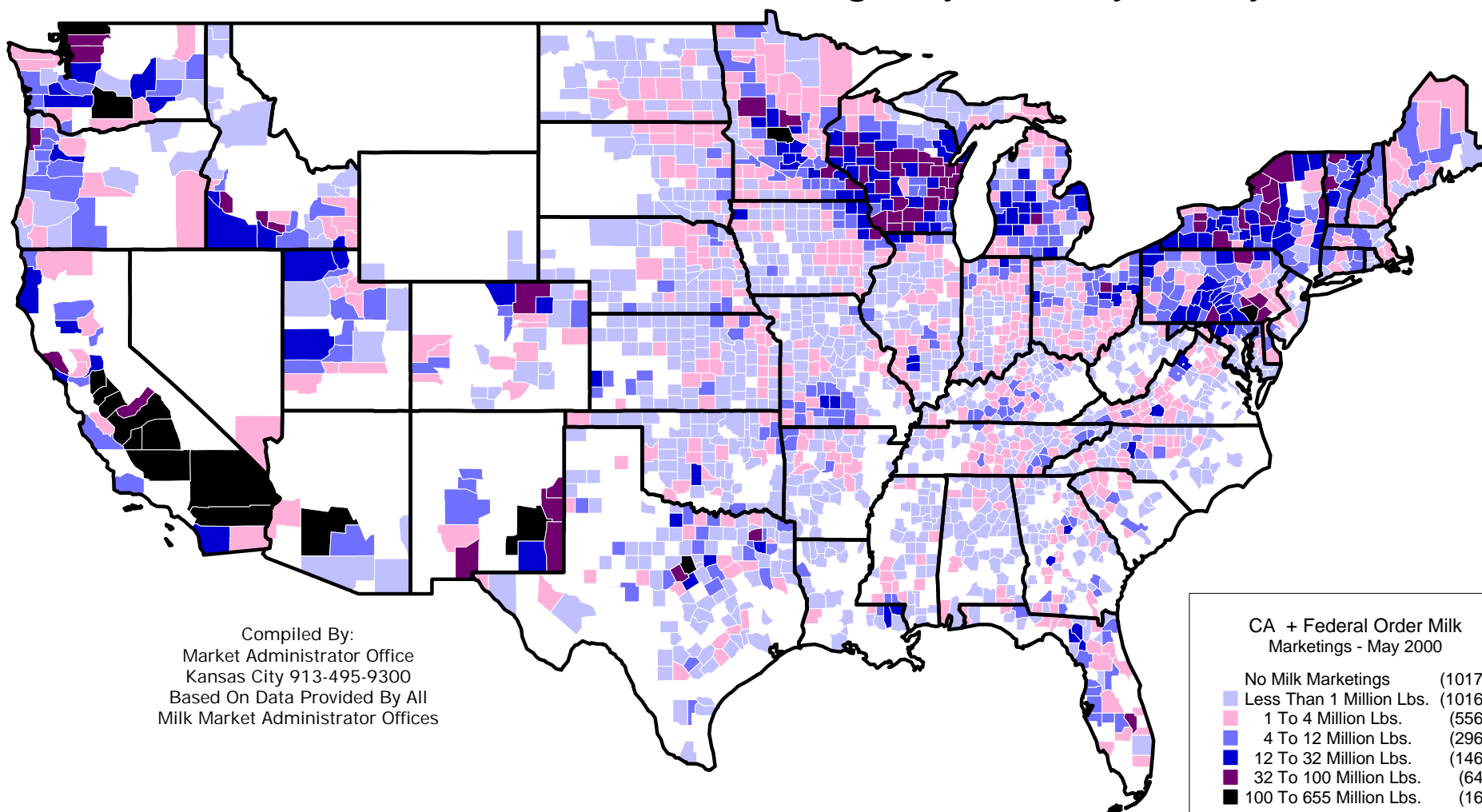
2,094 Counties Marketed 100% Of All
CA + Federal Order Milk During May 2000



14 Counties Marketed 25% Of The CA + Federal Order Milk During May 2000

	<u>05/95 Mktgs</u>	<u>05/00 Mktgs</u>	<u>Percent Change</u>	<u>05/00 As % Of Total</u>
Tulare, CA	431,710,141	654,988,844	+51.72	5.01
Merced, CA	245,661,591	364,322,197	+48.30	2.78
San Bernardino, CA	290,382,504	299,838,381	+3.26	2.29
Stanislaus, CA	232,950,879	281,894,998	+21.01	2.15
Maricopa, AZ	187,580,268	267,800,749	+42.77	2.05
Kings, CA	172,240,787	224,192,013	+30.16	1.71
Riverside, CA	226,138,785	203,053,144	-10.21	1.55
Lancaster, PA	157,778,286	181,449,092	+15.00	1.39
San Joaquin, CA	140,080,924	172,310,447	+23.01	1.32
Chaves, NM	110,859,071	153,028,837	+38.04	1.17
Fresno, CA	130,160,511	149,932,689	+15.19	1.15
Erath, TX	122,989,216	136,444,670	+10.94	1.04
Yakima, WA	102,252,672	130,072,759	+27.21	0.99
Whatcom, WA	115,311,241	122,707,435	+6.41	0.94
14-County Total	2,666,096,876	3,342,036,255	+25.35	25.54
CA + FO Total	12,451,297,671	13,083,564,993	+5.08	

CA + Federal Order Milk Marketings By County - May 2000



	Statistical Uniform Price		Producer Price Differential		Class I Utilization	
	<u>09/2000</u>	<u>08/2000</u>	<u>09/2000</u>	<u>08/2000</u>	<u>09/2000</u>	<u>08/2000</u>
Pacific Northwest	12.11	11.94	1.35	1.81	30.21	28.49
Western	11.94	11.53	1.18	1.40	29.37	27.70
Arizona-Las Vegas	12.32	12.20	-----	-----	34.69	35.39
Central	11.97	11.61	1.21	1.48	31.39	29.37
Southwest	13.28	13.16	2.52	3.03	49.12	48.42
Upper Midwest	11.46	10.97	0.70	0.84	20.20	18.61
Southeast	14.16	14.15	-----	-----	71.94	73.32
Mideast	12.53	12.49	1.77	2.36	45.86	48.85
Appalachian	14.41	14.40	-----	-----	76.31	75.36
Northeast	13.63	13.39	2.87	3.26	49.25	45.24
Florida	15.59	15.68	-----	-----	91.66	91.91

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