The Market Administrator's Report

Pacific Northwest & Arizona Marketing Areas

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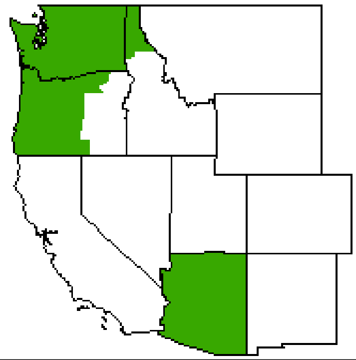

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March 2011

MARKET SUMMARIES FOR FEBRUARY 2011

Comparisons to a year ago can be found in the tables on pages 6 and 7.

Pacific Northwest

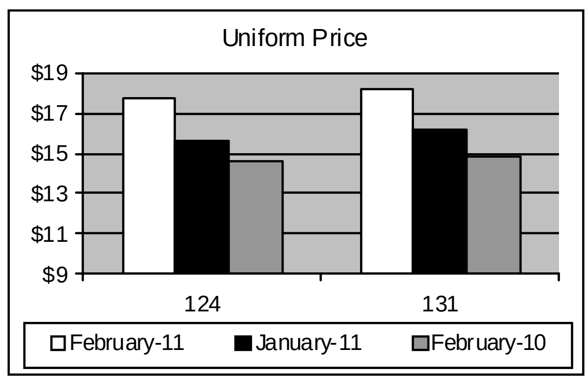
Producers delivered a total of 612.9 million pounds of milk to the market during February. Daily deliveries averaged 21.9 million pounds, up 1.6 percent from January. An estimated 630 producers delivered milk to the market during the month. Daily deliveries per producer averaged 34,745 pounds, up 1.6 percent from January.

Class I producer milk during February totaled 177.1 million pounds, 28.9 percent of total producer receipts. Daily usage averaged 6.3 million pounds, up 3.5 percent from January.

Arizona

Producers delivered a total of 364.2 million pounds of milk to the market during February. Daily deliveries averaged 13.0 million pounds, up 4.8 percent from January. An estimated 100 producers delivered milk to the market during the month. Daily deliveries per producer averaged 130,058 pounds, up 4.8 percent from January.

Class I producer milk during February totaled 118.1 million pounds, 32.4 percent of total producer receipts. Daily usage averaged 4.2 million pounds, up 3.4 percent from January. ♦



Federal Order Producer Prices and Component Levels: February 2011

Producer Prices	FO124	FO131	Component Levels (%)	FO124	FO131
Uniform Price 1/*	17.78	18.18	Butterfat	3.853	3.625
Butterfat 2/	2.2967	2.2357	Protein	3.172	N/A
Protein 2/	2.5586	N/A	Other Solids	5.721	N/A
Other Solids 2/	0.2310	N/A	Nonfat Solids	8.893	N/A
PPD 1/*	0.78	N/A			
Skim 1/	N/A	10.73			

N/A = not applicable. * Subject to applicable location adjustments. 1/ $ per cwt. 2/ $ per pound.

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FEBRUARY 2011 CLASS PRICES

February 2011 non-advanced Class Prices were calculated using NASS commodity price surveys from February 5, 12, 19, and 26, 2011. Component prices for the month are $2.5586 per pound of protein, $2.2967 per pound of butterfat, $0.2310 per pound of other solids, and $1.1930 per pound of nonfat solids.

February 2011 Class III and IV prices at 3.5% butterfat are $17.00 and $18.40 per hundredweight, respectively. The February Class III price compared to January is up $3.52. The Class III price is $2.72 higher than in February 2010.

Class II butterfat was announced at $2.3037 per pound. Class I skim and butterfat and Class II skim prices for February 2011 were announced on January 21. The Class II price at 3.5% butterfat is $17.97 for February 2011.

FINAL: NASS COMMODITY PRICES

	January	February	Change
Cheese*	$1.4076	$1.7449	$0.3373
Butter	$1.8428	$2.0680	$0.2252
Nonfat Dry Milk	$1.2530	$1.3728	$0.1198
Whey	$0.3935	$0.4234	$0.0299

* The weighted average of barrels plus 3 cents and blocks.

Current Commodity Prices - - The NASS survey of cheddar cheese prices showed an increase in price received for 40-pound blocks and 500-pound barrels. The survey of 40-pound blocks showed an increase of 33.24 cents between the February 12 and the March 12 surveys, to $1.9842 per pound. The survey of 500-pound barrels (**adjusted to 38% moisture**) showed an increase of 27.54 cents to $1.9733 per pound.

The NASS butter price showed a net decrease of 1.91 cents between the weeks ending February 12 and March 12 from $2.0862 per pound to $2.0671 per pound.

The NASS nonfat dry milk showed an increase of 11.53 cents since mid-February to $1.4766 per pound. The average price for NASS whey showed an increase of 4.27 cents since mid-February to $0.4628 per pound. ♦

APRIL'S CLASS I PRICE ANNOUNCEMENT

On March 18, the April 2011 Class I price was announced at $21.33 for the Pacific Northwest Order and $21.78 for the Arizona Order. The Class I price was calculated using NASS commodity price surveys from the weeks of March 5 and 12.

The April Class III and IV advance skim prices are $11.94 and $11.63 per hundredweight, respectively. The butterfat portion of the Class I mover decreased 5.53 cents from $2.3136 to $2.2583 per pound.

The April 2011 Class II skim and nonfat solids prices were also announced on March 18. The skim price is $12.33 per hundredweight, and the nonfat solids price is $1.3700 pound for all Federal orders. ♦

ADVANCED: NASS COMMODITY PRICES FOR CLASS I PRICE CALCULATIONS

	March	April	Change
Cheese*	$1.6386	$1.9735	$0.3349
Butter	$2.0820	$2.0363	-$0.0457
Nonfat Dry Milk	$1.3467	$1.4733	$0.1266
Whey	$0.4146	$0.4618	$0.0472

* The weighted average of barrels plus 3 cents and blocks.

YEAR END FINANCIAL STATEMENTS OF THE MARKET ADMINISTRATOR'S OFFICE

The financial statements for the Administrative and Marketing Services Funds of the Pacific Northwest and Arizona Federal Milk Marketing Orders for the calendar year ending December 31, 2010, can be found on page 3. The two orders require that the market administrator conduct a marketing service program for producers who are not members of a qualified cooperative association which performs comparable services. The primary functions of the marketing service programs involve the sampling and testing of milk, and providing marketing information to producers. The principal source of income for these programs is the marketing service deduction which is applicable to all producers for whom the services are provided.♦

INCOME AND EXPENSE STATEMENT
For Year Ending December 31, 2010

	Administrative Fund		Marketing Service Fund	
Income				
Assessments or Deductions	$	4,374,180	$	222,452
Late Payment Charges Assessed		16,157		-
Interest Earned		7,766		-
Total Income *	$	4,398,103	$	222,452
Expenses				
Salaries and Services	$	2,458,993	$	56,854
Travel		148,166		12,190
Communications		48,091		983
Employer Payroll Contributions		683,806		13,955
Insurance		8,205		167
Rent-Buildings and Equipment		307,069		6,796
Repairs and Maintenance		9,225		20,540
Supplies		59,396		31,511
Testing and Weighing		56,522		53,757
Utilities		14,621		298
Depreciation of Fixed Assets		52,950		14,760
Conferences and Meetings		7,413		151
Training		47,427		968
Miscellaneous		4,527		95
Total Expenses *	$	3,906,411	$	213,027
NET INCOME *	$	491,692	$	9,425

BALANCE SHEET
As of December 31, 2010

ASSETS	Administrative Fund		Marketing Service Fund	
Current Assets				
Cash	$	2,708,774	$	(82,280)
Investments		1,000,000		-
Accounts Receivable:				
Handlers		399,262		19,521
Other		39,532		52
Accrued Interest Receivable		2,934		-
Other Assets				
Prepaid Expenses		2,015		5,588
Deposits		5,705		-
Fixed Assets				
Furniture and Equipment		845,845		17,262
Accumulated Depreciation		(814,369)		(16,620)
Laboratory Equipment		163,974		186,682
Accumulated Depreciation		(106,583)		(116,930)
Leasehold Improvements		209,109		4,268
Accumulated Depreciation		(208,526)		(4,255)
TOTAL ASSETS *	$	4,247,673	$	13,289
LIABILITIES AND OPERATING BALANCE				
Current Liabilities				
Accounts Payable:				
Trade Creditors	$	816	$	-
Accrued Employee Annual Leave		177,396		3,971
Operating Balance		4,069,462		9,318
TOTAL LIABILITIES AND OPERATING BALANCE *	$	4,247,673	$	13,289

* May not add due to rounding.

USDA INTRODUCES ONLINE ATLAS OF RURAL AND SMALL-TOWN AMERICA

On February 18, 2011, Agriculture Secretary Tom Vilsack announced the debut of an online mapping tool that captures a broad range of demographic, economic, and agricultural data on rural areas across the United States. The Atlas of Rural and Small-town America, developed by USDA's Economic Research Service, provides county-level mapping of over 60 statistical indicators depicting conditions and trends across different types of nonmetro regions.

"The new Atlas will complement USDA's efforts in promoting rural development and well-being by helping policy makers pinpoint the needs of particular regions, recognize their diversity, and build on their assets," said Vilsack. "The Atlas is part of a broad USDA initiative to make relevant data easily accessible to the public, including researchers, journalists, public officials, and other professionals."

Nearly 50 million people - 17 percent of the U.S. population - live in nonmetropolitan (nonmetro) America, covering approximately 2,000 counties. Economic and social challenges facing rural areas and small towns differ greatly from those affecting larger U.S. cities, and vary substantially from one nonmetro county to the next.

The Atlas allows users to geographically compare selected states or regions using data on population, age structure, race and ethnicity, income, employment, agricultural well-being, and other measures. Regional planners in the rural Southwest, for example, could compare population trends in their area with counties or states in the Midwest. Maps can be filtered to show only counties of a certain type, such as those with high levels of manufacturing or with persistent poverty. For example, this option could be used to show high unemployment in manufacturing-dependent counties.

This web-based product assembles the latest county-level statistics from the U.S. Census Bureau, the Bureau of Labor Statistics, the Bureau of Economic Analysis, USDA, and other Federal sources. Of particular note, the Atlas incorporates data from the first full set of county-level data in the Census Bureau's American Community Survey (ACS). Data from the various agencies are combined in four broad categories that users can select:

- **People**: county demographic profiles, including age, race/ethnicity, education, family composition, population change, migration, and immigration.
- **Jobs**: conditions and trends affecting the labor force, such as employment change, unemployment, industry, and occupational structure.
- **Agriculture**: indicators of farm structure and the well-being of farm households, including farm size, income, sales, and tenure.
- **County typologies**: ERS county classifications based on the rural-urban continuum, economic structure, and other key locational features, such as, landscape amenities, occupation types, persistent poverty, or population loss status.

Users can click on a county and view a pop-up box showing data on all the indicators in each of these four categories. In addition, users can view an indicator (e.g., employment data) for the entire country, or can zoom into specific regions, states, or sub-state areas, and pan across the U.S. at different scales on the map. Maps can be downloaded for use in documents and presentations, and data are accessible via downloadable spreadsheets.

The Rural Atlas is visually and functionally similar to another product developed by the Economic Research Service - the Food Environment Atlas - which maps U.S. counties by factors that reflect a communities' access to affordable, healthy food. That web-based tool has attracted considerable attention from the media and among professionals concerned with diet and public health.

The Atlas of Rural and Small-Town America is available online at: www.ers.usda.gov/Data/RuralAtlas/. ♦

DAIRY INDUSTRY ADVISORY COMMITTEE VOTES TO APPROVE FINAL REPORT OF RECOMMENDATIONS

The Dairy Industry Advisory Committee voted on March 3, 2011, to approve a final report to Agriculture Secretary Tom Vilsack that offers recommendations concerning dairy farm profitability and milk prices.

The vote, which was held during a public meeting via conference call, supports a report that offers 23 public policy recommendations.

"A tremendous amount of time and effort has been put into this report by members of the Dairy Industry Advisory Committee and I'm appreciative of their efforts and their willingness to dedicate time in support of the dairy industry," said Agriculture Secretary Tom Vilsack.

The Dairy Industry Advisory Committee was chartered to review farm milk price volatility and dairy farmer profitability. The committee was asked to make recommendations to the Secretary on how USDA can best address these issues to meet the dairy industry's needs, both short and long-term. The committee also was asked to provide feedback on how actions taken by USDA in 2009 have affected the dairy industry.

For a written copy of the report - which was set to be available within approximately 10 days - contact Solomon Whitfield at Solomon.Whitfield@ wdc.usda.gov. An electronic version of the report can be found at www.fsa.usda.gov/DIAC. ♦

USDA REVIEWS IMPACT OF ORGANIC REGULATIONS ON SMALL BUSINESSES

On February 25, 2011, the U.S. Department of Agriculture announced that it is reviewing the National Organic Program (NOP) regulations (7 CFR part 205) concerning their impact on small businesses.

The review is being conducted under criteria contained in section 610 of the Regulatory Flexibility Act, whose provisions require that all Federal agencies review existing regulations that have a significant economic impact on a substantial number of small entities and to determine whether the associated impact can be minimized.

In doing so, the Agricultural Marketing Service (AMS) will consider the following: (1) The continued need for the regulations; (2) the nature of complaints or comments received from the public concerning the regulations; (3) the complexity of the regulations; (4) the extent to which the regulations overlap, duplicate, or conflict with other Federal rules, and, to the extent feasible, with State and local regulations; and (5) the length of time since the regulations have been evaluated or the degree to which technology, economic conditions, or other factors have changed in the area affected by the regulations. This review of the NOP regulations will help determine whether they should be continued (without change), amended, or rescinded to minimize the impacts on small entities.

"AMS is committed to mitigating undue burden on the entities we serve, which range from small to large producers and handlers," said Rayne Pegg, AMS administrator. "As we periodically review our regulations we will consider these criteria to determine how the NOP standards should continue to be enforced."

AMS invites the public to provide written comments, views, opinions, and other information specific to the impact of the NOP regulations on small businesses. Interested persons can send comments by visiting www.regulations.gov (reference document number AMS-NOP-11-0005; NOP-11-01), or by mailing written comments to Toni Strother, Agricultural Marketing Specialist, National Organic Program, USDA-AMS-NOP, 1400 Independence Ave., SW, Room 2646-So., Ag Stop 0268, Washington, DC 20250. Comments must be received by April 26, 2011.

For further information, contact Melissa Bailey, Ph.D., Director, Standards Division, National Organic Program, by telephone: (202) 720-3252 or electronic mail: Melissa.Bailey@usda.gov. ♦

HIGHER CARBON PRICES COULD SPUR ADOPTION OF METHANE DIGESTERS

In the March 2011 edition of USDA's *Amber Waves* publication, there is an in-depth discussion on the profitability of methane digesters. The following is an excerpt from the article.

- A market price for carbon emission reductions would allow livestock producers with methane digesters to earn additional revenue from trapping and burning methane from manure.
- Greater income from reducing methane emissions could substantially increase the number of livestock producers who would find it profitable to install methane digesters.
- Large-scale hog and dairy operations with lagoon manure management systems are likely to benefit most from a higher carbon price, which could have long-run structural implications for the livestock sector.

The full content of this feature is available on the ERS website at: www.ers.usda.gov/AmberWaves/ March11/Features/MethaneDigesters.htm.♦

MONTHLY SELECTED STATISTICS

Minimum Class Prices (3.5% B.F.)	Pacific Northwest Feb 2011	Pacific Northwest Jan 2011	Pacific Northwest Feb 2010	Pacific Northwest Jan 2010	Arizona Feb 2011	Arizona Jan 2011	Arizona Feb 2010	Arizona Jan 2010
Class I Milk ($/cwt.)	$17.79	$17.10	$16.74	$16.93	$18.24	$17.55	$17.19	$17.38
Class II Milk ($/cwt.)	17.97	16.79	15.65	15.22	17.97	16.79	15.65	15.22
Class III Milk ($/cwt.)	17.00	13.48	14.28	14.50	17.00	13.48	14.28	14.50
Class IV Milk ($/cwt.)	18.40	16.42	12.90	13.85	18.40	16.42	12.90	13.85
Producer Prices								
Producer Price Differential ($/cwt.)	$ 0.78	$ 2.09	$ 0.35	$ 0.38	+	+	+	+
Butterfat ($/pound)	2.2967	2.0239	1.4404	1.4405	+	+	+	+
Protein ($/pound)	2.5586	1.7590	2.7066	2.7916	+	+	+	+
Other Solids ($/pound)	0.2310	0.2002	0.1992	0.1946	+	+	+	+
Uniform Skim Price ($/cwt.) . . .	+	+	+	+	10.73	9.61	10.19	10.43
Uniform Butterfat Price ($/pound)	+	+	+	+	2.2357	1.9878	1.4408	1.4709
Statistical Uniform Price ($/cwt.) . .	$17.78	$15.57	$14.63	$14.88	$18.18	$16.23	$14.88	$15.21
Producer Data								
Number of Producers	630 *	630	631	632	100 *	100	93	94
Avg. Daily Production (lbs.) . . .	34,745 *	34,193	35,835	34,986	130,058 *	124,082	129,088	122,455
Producer Milk Ratios								
Class I	28.89%	28.35%	27.32%	28.16%	32.43%	32.88%	32.75%	33.38%
Class II	7.12%	6.17%	6.65%	5.83%	8.35%	9.13%	7.31%	6.98%
Class III	39.02%	39.63%	38.84%	37.71%	27.08%	26.52%	25.46%	26.89%
Class IV	24.97%	25.85%	27.19%	28.30%	32.14%	31.47%	34.48%	32.75%

\+ Not Applicable. * Preliminary.

MONTHLY SUPPLEMENTAL STATISTICS

Number of Handlers	Pacific Northwest Jan 2011	Pacific Northwest Dec 2010	Pacific Northwest Jan 2010	Pacific Northwest Dec 2009	Arizona Jan 2011	Arizona Dec 2010	Arizona Jan 2010	Arizona Dec 2009
Pool Handlers	26	26	28	26	7	7	7	7
Distributing Plants	*14*	*14*	*15*	*14*	*5*	*5*	*5*	*5*
Supply Plants 1/	*7*	*7*	*8*	*7*	*1*	*1*	*1*	*1*
Cooperatives	*5*	*5*	*5*	*5*	*1*	*1*	*1*	*1*
Producer-Handlers	5	5	5	5	0	0	0	0
Other Plants w/ Class I Use . . .	18	22	23	24	22	23	25	25
Class I Route Disposition In Area								
By Pool Plants	175,248,364	174,867,773	175,594,630	180,912,244	98,259,546	96,097,716	98,031,580	99,157,408
By Producer-Handlers	7,921,154	8,754,709	6,721,445	7,263,382	0	0	0	0
By Other Plants	8,185,510 *	10,194,890	7,377,617	8,172,813	6,894,838 *	7,173,168	5,551,436	5,951,124
Total	191,355,028	193,817,372	189,693,692	196,348,439	105,154,384	103,270,884	103,583,016	105,108,532
Producer-Handler Data								
% Class I Use	61.47%	62.54%	83.31%	84.50%	0.00%	0.00%	0.00%	0.00%
% of Total In-Area Route Dispositions	4.14%	4.52%	3.54%	3.70%	0.00%	0.00%	0.00%	0.00%

* Preliminary. 1/ Includes Cooperative Pool Manufacturing Plants

MONTHLY STATISTICAL SUMMARY

(Product pounds based upon reports of handlers)

RECEIPTS, UTILIZATION AND CLASSIFICATION OF MILK	PACIFIC NORTHWEST				ARIZONA			
	Feb 2011	Jan 2011	Feb 2010	Jan 2010	Feb 2011	Jan 2011	Feb 2010	Jan 2010
TOTAL PRODUCER MILK	612,904,142	667,787,395	633,137,800	685,451,077	364,162,203	384,653,480	336,145,325	356,834,197
RECEIPTS FROM OTHER SOURCES	12,435,384	12,408,437	9,605,928	10,451,152	3,000,884	2,582,121	1,734,125	2,367,334
OPENING INVENTORY	36,929,464	35,368,361	39,217,686	28,359,605	21,899,827	21,096,547	21,638,176	20,013,259
TOTAL TO BE ACCOUNTED FOR	662,268,990	715,564,193	681,961,414	724,261,834	389,062,914	408,332,148	359,517,626	379,214,790
UTILIZATION OF RECEIPTS								
Whole milk	29,358,423	32,910,741	29,091,069	32,072,636	22,528,781	24,179,840	21,969,434	24,439,131
Flavored milk & milk drinks	12,609,911	13,231,997	12,255,306	13,234,182	6,310,867	6,618,043	6,272,847	6,424,609
2% milk	64,785,459	70,431,960	63,731,278	71,883,220	32,961,221	35,769,248	32,966,788	36,702,933
1% milk	25,991,631	28,520,281	25,145,997	28,243,298	16,000,830	17,497,906	14,825,698	16,288,847
Skim milk	27,519,037	28,900,899	26,211,105	28,911,102	12,929,197	13,792,102	12,661,526	13,776,743
Buttermilk	1,195,072	1,252,486	1,261,179	1,250,192	404,731	402,407	393,832	399,317
CLASS I ROUTE DISP. IN AREA . .	161,459,533	175,248,364	157,695,934	175,594,630	91,135,627	98,259,546	89,090,125	98,031,580
Class I dispositions out of area . . .	14,651,720	14,279,659	15,697,386	16,099,285	21,583,681	22,672,111	22,106,666	23,562,849
Other Class I usage	16,445,311	17,166,278	15,102,451	17,710,716	17,531,365	16,568,564	10,525,726	11,611,328
TOTAL CLASS I USE.	192,556,564	206,694,301	188,495,771	209,404,631	130,250,673	137,500,221	121,722,517	133,205,757
TOTAL CLASS II USE	49,855,876	48,006,242	48,378,613	47,923,180	30,923,864	35,744,918	25,252,311	25,508,223
TOTAL CLASS III USE	243,698,531	266,731,290	245,974,936	258,507,009	98,782,246	102,222,166	85,591,688	95,945,255
TOTAL CLASS IV USE	176,158,019	194,132,360	199,112,094	208,427,014	129,106,131	132,864,843	126,951,110	124,555,555
TOTAL ACCOUNTED FOR	662,268,990	715,564,193	681,961,414	724,261,834	389,062,914	408,332,148	359,517,626	379,214,790
CLASSIFICATION OF RECEIPTS								
Producer milk: Class I . .	177,074,036	189,346,569	172,944,653	193,019,886	118,114,621	126,477,065	110,076,871	119,111,499
Class II .	43,636,107	41,210,326	42,114,435	39,946,306	30,401,201	35,126,579	24,574,570	24,923,675
Class III .	239,179,703	264,647,507	245,900,242	258,488,432	98,608,555	102,028,417	85,591,688	95,942,419
Class IV .	153,014,296	172,582,993	172,178,470	193,996,453	117,037,826	121,021,419	115,902,196	116,856,604
Other receipts: Class I .	15,482,528	17,347,732	15,551,118	16,384,745	12,136,052	11,023,156	11,645,646	14,094,258
Class II .	6,219,769	6,795,916	6,264,178	7,976,874	1/	1/	1/	1/
Class III .	4,518,828	2,083,783	74,694	18,577	1/	1/	1/	1/
Class IV .	23,143,723	21,549,367	26,933,624	14,430,561	12,764,659	12,655,512	11,726,655	8,286,335
Avg. daily producer receipts	21,889,434	21,541,529	22,612,064	22,111,325	13,005,793	12,408,177	12,005,190	11,510,781
Change From Previous Year . .	-3.20%	-2.58%	0.99%	-0.95%	8.33%	7.80%	-2.64%	-2.87%
Avg. daily Class I use	6,877,020	6,667,558	6,731,992	6,754,988	4,651,810	4,435,491	4,347,233	4,296,960
Change From Previous Year . .	2.15%	-1.29%	-2.65%	-0.89%	7.01%	3.22%	-1.14%	3.54%

1/ Restricted - Included with Class IV.

HIGHLIGHTS THIS ISSUE:

- **Market Summaries for February 2011**
- **February 2011 Class Prices**
- **Class I Price for April 2011**
- **Year End Financial Statements of the Market Administrator's Office**
- **USDA Introduces Online Atlas of Rural and Small-town America**
- **Dairy Industry Advisory Committee Votes to Approve Final Report of Recommendations**
- **USDA Reviews Impact of Organic Regulations on Small Businesses**
- **Higher Carbon Prices Could Spur Adoption of Methane Digesters**
- **Appointment of Market Administrator for the Pacific Northwest and Arizona Milk Marketing Orders**

APPOINTMENT OF MARKET ADMINISTRATOR FOR THE PACIFIC NORTHWEST AND ARIZONA MILK MARKETING ORDERS

On February 18, 2011, Dana Coale, Deputy Administrator of Dairy Programs, Agricultural Marketing Service, announced the appointment of William A. Wise as Market Administrator for the Pacific Northwest and Arizona Milk Marketing Orders effective February 27, 2011. Mr. Wise graduated from the University of Phoenix with a Bachelor's Degree in Business Administration and from Arizona State University with a Master's Degree in Business Administration. He has served his entire 29-year career in the Phoenix, Arizona, Market Administrator Office.

Mr. Wise has been an Assistant Market Administrator since 1995 and most recently responsible for aiding in the administration of the Pacific Northwest and Arizona Milk Marketing Orders.♦