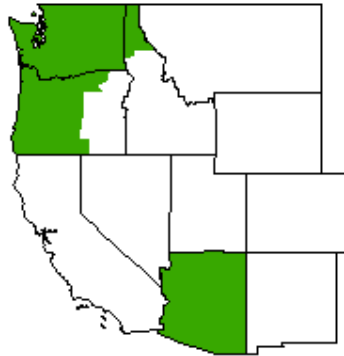


Pacific Northwest & Arizona Marketing Areas



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James R. Daugherty
 Market Administrator

November 2007

MARKET SUMMARIES FOR OCTOBER 2007

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

Pacific Northwest

Producers delivered a total of 578.3 million pounds of milk to the market during October. Daily deliveries averaged 18.7 million pounds, down 1.4 percent from September. An estimated 688 producers delivered milk to the market during the month. Daily deliveries per producer averaged 27,116 pounds, down 1.4 percent from September.

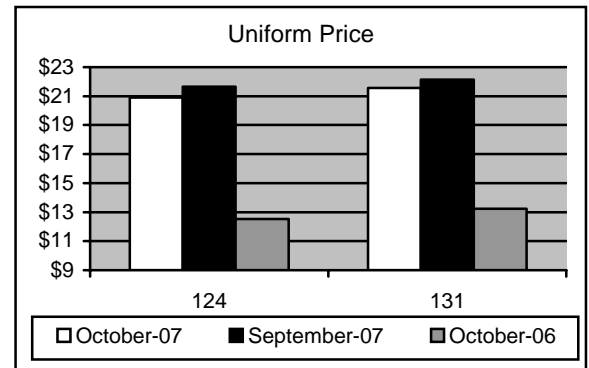
Class I producer milk during October totaled 202.7 million pounds, 35.0 percent of total producer receipts. Daily usage averaged 6.5 million pounds, up 10.0 percent from September.

Arizona

Producers delivered a total of 309.3 million pounds of milk to the market during October. Daily deliveries averaged 10.0

million pounds, up 5.9 percent from September. An estimated 93 producers delivered milk to the market during the month. Daily deliveries per producer averaged 107,279 pounds, up 5.9 percent from September.

Class I producer milk during October totaled 123.5 million pounds, 39.9 percent of total producer receipts. Daily usage averaged 4.0 million pounds, up 7.7 percent from September. ♦



Federal Order Producer Prices and Component Levels: October 2007

Producer Prices	FO124	FO131	Component Levels (%)	FO124	FO131
Uniform Price 1/*	20.91	21.57	Butterfat	3.774	3.639
Butterfat 2/	1.4092	1.4411	Protein	3.183	N/A
Protein 2/	4.1695	N/A	Other Solids	5.724	N/A
Other Solids 2/	0.2286	N/A	Nonfat Solids	8.907	N/A
PPD 1/*	2.21	N/A			
Skim 1/	N/A	17.13			

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

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OCTOBER 2007 CLASS PRICES

October 2007 non-advanced Class Prices were calculated using NASS commodity price surveys from October 6, 13, 20, and 27, 2007. Component prices for the month are \$4.1695 per pound of protein, \$1.4092 per pound of butterfat, \$0.2286 per pound of other solids, and \$1.8855 per pound of nonfat solids.

October 2007 Class III and IV prices at 3.5% butterfat are \$18.70 and \$21.31 per hundredweight, respectively. The October Class III price compared to September is down \$1.37; the Class IV price is down \$0.30. The Class III price is \$6.38 higher than in October 2006 and the Class IV price is \$9.80 higher. The Class III price at 3.67% butterfat is \$9.02 above the support price of \$9.90 at 3.67% butterfat.

Class II butterfat was announced at \$1.4162 per pound. Class I skim and butterfat and Class II skim prices for October 2007 were announced on September 21, 2007. The Class II price at 3.5% butterfat is \$21.90 for October 2007.

FINAL: NASS COMMODITY PRICES

	September	October	Change
Cheese*	\$2.0250	\$1.9227	-\$0.1023
Butter	\$1.3786	\$1.2945	-\$0.0841
Nonfat Dry Milk	\$2.0557	\$2.0615	\$0.0058
Whey	\$0.4762	\$0.4175	-\$0.0587

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

Current Commodity Prices - - The NASS survey of cheddar cheese prices showed a net increase in prices received for 40-pound blocks and 500-pound barrels. The survey of 40-pound blocks showed a net increase of 8.38 cents between the October 13 and the November 17 surveys, to \$1.9806 per pound. The survey of 500-pound barrels (adjusted to 38% moisture) showed a net increase of 4.12 cents to \$1.9669 per pound.

The NASS butter price showed a net increase of 2.19 cents between the weeks ending October 13 and November 17 from \$1.2946 per pound to \$1.3165 per pound.

The NASS nonfat dry milk showed a net decrease of 17.75 cents since mid-October to \$1.9081 per pound.

The average price for NASS whey showed a net increase of 2.85 cents since mid-October to \$0.4382 per pound. ♦

DECEMBER'S CLASS I PRICE ANNOUNCEMENT

On November 23, the December 2007 Class I price was announced at \$21.94 for the Pacific Northwest Order and \$22.39 for the Arizona Order. The Class I price was calculated using NASS commodity price surveys from the weeks of November 10 and 17.

The December Class III and IV advance skim prices are \$14.81 and \$15.65 per hundredweight, respectively. The butterfat portion of the Class I mover decreased 1.98 cents from \$1.4318 to \$1.4120 per pound.

The December 2007 Class II skim and nonfat solids prices were also announced on November 23. The skim price is \$16.35 per hundredweight, and the nonfat solids price is \$1.8167 per pound for all Federal orders. ♦

ADVANCED: NASS COMMODITY PRICES FOR CLASS I PRICE CALCULATIONS

	November	December	Change
Cheese*	\$1.9438	\$1.9648	\$0.0210
Butter	\$1.3134	\$1.2969	-\$0.0165
Nonfat Dry Milk	\$2.0699	\$1.9131	-\$0.1568
Whey	\$0.4111	\$0.4385	\$0.0274

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

ERRATA

The Market Summary in the October 2007 Market Administrator's Report indicated that "Daily deliveries per producer averaged 27,462 pounds, down 5.1 percent from August." The sentence should have read: "Daily deliveries per producer averaged 27,462 pounds, down 1.7 percent from August." ♦

USDA REOPENS COMMENT PERIOD FOR ESTABLISHMENT OF DAIRY PRODUCT MANDATORY REPORTING PROGRAM

WASHINGTON, November 1, 2007 – The U.S. Department of Agriculture announced today that it is reopening the comment period for the interim final rule for the Dairy Product Mandatory Reporting program. The rule was published on July 3rd and

became effective August 2nd. The original comment period ended September 4th. Under this action, additional comments are due December 3, 2007. Comments submitted during the first comment period need not be resubmitted. The reopening of the comment period will provide interested parties with an additional opportunity to submit comments on all aspects of the program. USDA's Agricultural Marketing Service (AMS) will review and consider all submitted comments as it writes a final rule.

The Dairy Market Enhancement Act of 2000, and certain provisions of the 2002 Farm Bill amended the Agricultural Marketing Act of 1946 to establish the program. The mandatory reporting program provides timely, accurate, and reliable market information to facilitate more informed marketing decisions and promote competition in the dairy product manufacturing industry. The program :

- (1) Requires persons engaged in manufacturing dairy products to report certain information including the price, quantity, and moisture content where applicable, of dairy products sold by the manufacturer; and
- (2) Requires persons storing dairy products to report information on the quantity of dairy products stored.

USDA's National Agricultural Statistics Service (NASS) collects the information. Any manufacturer that processes and markets less than 1 million pounds of dairy products per year is exempt from the reporting requirements.

AMS has implemented a plan to verify the price information submitted to NASS. AMS visits butter, nonfat dry milk, cheese and dry whey manufacturers that file reports. AMS verifies that eligible sales transactions agree with information reported to NASS and will check for eligible sales transactions that were not reported.

Details of the reopening of the comment period for the interim final rule will be published in the November 2 Federal Register. Comments should be sent to John R. Mengel, Chief Economist, USDA/AMS/Dairy Programs, Office of the Chief Economist, STOP 0229-Room 2753, 1400 Independence Ave., SW, Washington, DC 2025—0229. Comments may also be submitted through the Federal eRulemaking portal at <http://www.regulations.gov>.

Excerpt from Federal Register

This reopening of the comment period will provide interested parties with an additional opportunity to submit comments on all aspects of the program, including but not limited to the product

specifications and whether there should be a minimum transaction volume for reported transactions. Specifically, AMS also solicits comments on whether Kosher dairy products and products produced from milk from cows not treated with recombinant bovine somatotropin (rbST) should be included in the Dairy Product Prices report, whether these products command a premium in the marketplace, and whether there are increased production costs associated with manufacturing these products. During the initial comment period, some commenters may have limited their comments to the issue of forward contracting and to the verification aspect of the program. AMS seeks comments on all aspects of the program, including those specific issues outlined above, and will consider all comments received in promulgating a final rule. ♦

Source: Federal Register, Vol. 72, No. 212, Friday, November 2, 2007, page 62105.

HISTORY OF FEDERAL MILK MARKETING AREAS IN THE NORTHWEST

The following article appeared in the June 1998 Market Administrator's Report and illustrates certain aspects of the history of Federal milk marketing orders in the Pacific Northwest. Currently, a proposal has been put forth to expand the Pacific Northwest Order from its current boundaries to encompass much of the region formerly regulated by the Western Order (FO 135) which was terminated April 1, 2004. This article is republished for historical purposes and is not intended to be taken as a statement for or against the proposal to expand the Pacific Northwest Order or any other proposal that may be made. An update of the history will appear in a future Market Administrator's Report.

The Marketing Agreement Act of 1937 empowered the United States Secretary of Agriculture to create and enforce Federal orders to help stabilize market conditions with regulations enforceable by law. A Federal milk order is a legal document issued to regulate the minimum prices paid to dairy farmers by handlers of Grade A milk in a specified marketing area. Orders are initiated by dairy farmers, usually through cooperatives, and can be issued only with the approval of the dairy farmers in the affected market.

Mergers of Federal orders generally reflect the historical consolidation of dairy production and marketing. In 1996, some 83,000 dairy farmers delivered nearly 105 billion pounds of milk to regulated handlers. This represented about 68% of all U.S. milk marketings. The amount of milk regulated under Federal orders has doubled since the early 1960's, even though there are only half as many orders. The reduction in the number of Federal orders occurred at the request of the dairy industry through mergers and consolidations of marketing areas. In much the same way, Federal orders in the Northwest have been merged and expanded to cover larger geographic areas.

Federal Milk Market Orders in the Northwest

The history of Federal orders in the Northwest can be divided into two periods: the Creation Period lasting from 1951 through 1981, and the Consolidation Period from 1984 to the present. During the Creation Period, cooperatives and dairy farmers requested the enactment of Federal orders in their milk sheds to help coordinate the supply and demand of milk, establish minimum and uniform prices based on classified pricing, and prevent disorderly marketing. Each new Federal order focused on a single, large metropolitan area (e.g. Seattle, Spokane, Portland, and Boise) due to the significant demand for fluid milk in combination with geographic and economic limitations associated with transportation, refrigeration, and other technologies. Over time, improvements to the transportation infrastructure, better refrigeration, and new technologies expanded the area to which fluid milk products could be marketed efficiently. Eventually, the initial geographic "market areas" became outmoded and the industry requested new, broader market areas. Through mergers of Federal order marketing areas, at the request of the dairy industry, Federal orders have evolved to their present geographic borders. The history of Federal orders in the Northwest as shown through number of producers and pounds of producer milk under regulation is described below and with tables and graphs on page 4 and 5.

Creation Period: 1951-1981

The first Federal Order in the Northwest was instituted in June, 1951 and was called the Puget Sound-Washington Order. The marketing area of the order covered the region from Olympia to Everett and had a milk shed covering most of the northern half of Western Washington. In December, 1951, the Puget Sound-Washington Order consisted of 3,337 producers and had 43.0

million pounds of producer milk. By December, 1983, the number of producers associated with the order dropped to 1,148, but producer milk increased to 188.1 million pounds.

The second Federal order in the Northwest was the Inland Empire Order, instituted in April, 1956, with a marketing area consisting of most of the counties surrounding Spokane. The milkshed extended from Eastern Washington into Northern Idaho and Western Montana. In December of that year, the order had 952 producers and 11.7 million pounds of producer milk. By December, 1983, the number of producers had fallen to 298, while producer milk increased to 37.9 million pounds.

In January, 1970, the Oregon-Washington Order was formed with a marketing area of North Central and Western Oregon and most of the South Central and Southwestern border counties of Washington. In December, 1970, the order had 1,295 producers and 87.7 million pounds of producer milk. By December, 1988, producer numbers dropped to 846 but producer milk rose to 178.3 million pounds.

In July, 1981, the Southwestern Idaho-Eastern order had 371 producers and milk production of 44.6 million pounds. In December, 1996, the order had 400 producers and 231.4 million pounds of producer milk.

Consolidation Period: 1984-Present

In January, 1984, the Puget Sound and Inland Orders were merged to create the Puget Sound-Inland Empire Order. In December, 1984, the order had 1,416 producers and producer milk of 231.6 million pounds. By December, 1988, producer numbers dropped to 1,086 but producer milk increased to 246.3 million pounds. In February, 1989, the Puget Sound-Inland Empire and the Oregon-Washington Orders were combined to form the Pacific Northwest Order. In December, 1989, the Pacific Northwest Order had 1,848 producers and 450.5 million pounds of producer milk. By December, 1997, the order had decreased to 1,191 producers but increased in milk production to 533.2 million pounds.

Currently, USDA is reviewing comments on a Proposed Rule which could reduce the number of orders from the present 31 to 11 orders. ♦

Source: Market Administrator's Report, Vol. 23, Number 6, June 1998.

Federal Orders Inception and Major Markets

Order	Inception	To	Major Markets
Puget Sound	June, 1951	December, 1983	Seattle
Inland Empire	April, 1956	December, 1983	Spokane
Oregon-Washington	January, 1970	January, 1989	Portland
Puget Sound-Inland	January, 1984	January, 1989	Seattle & Spokane
Pacific Northwest	February, 1989	Present	Seattle, Portland, & Spokane
Southwestern Idaho-Eastern Oregon	July, 1981	Present	Boise

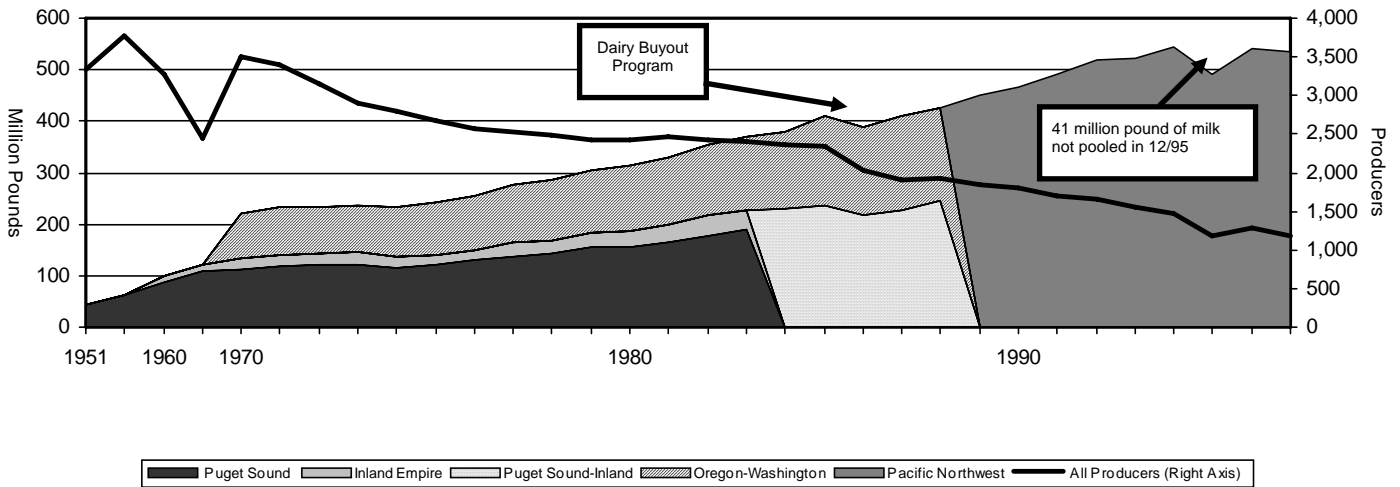
Pacific Northwest Federal Orders: December Milk Production and Producer Number for Selected Years

Order	Year	Producer Milk (Million Pounds)	Producers
Puget Sound-Washington (N)	1951	43.0	3,337
	1983	188.1	1,148
Inland Empire (N)	1956	11.7	952
	1983	37.9	298
Oregon-Washington (N)	1970	87.7	1,295
	1988	178.3	846
Puget Sound-Inland (M)	1984	231.6	1,416
	1988	246.3	1,086
Pacific Northwest (M)	1989	450.5	1,848
	1997	533.2	1,191
Southwestern Idaho-Eastern Oregon (N)	1981	44.6	371
	1996	231.4	400
	1997 1/	106.6	349

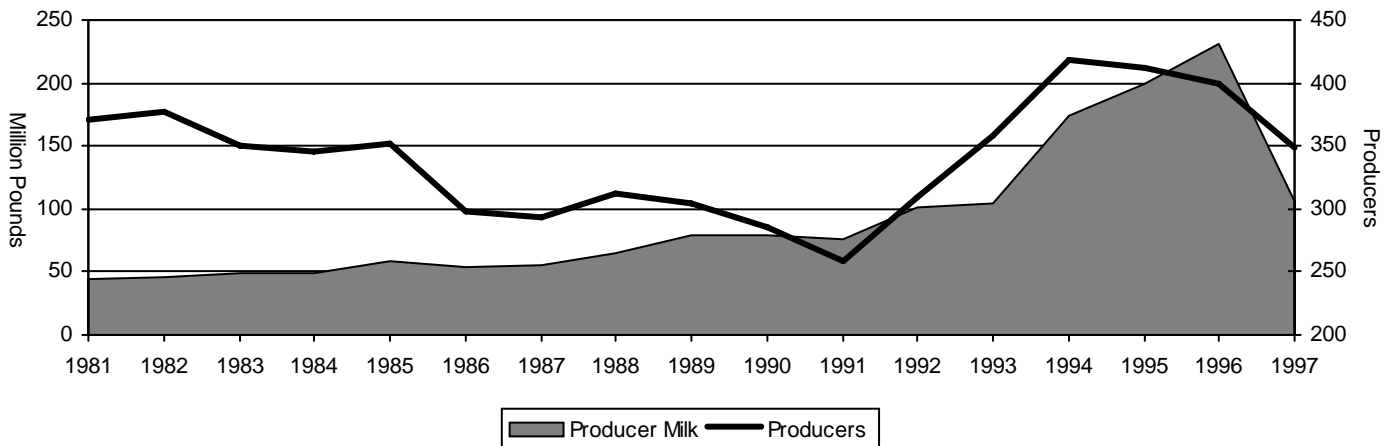
N-New order. M-Order resulted from merger/consolidation.

1/ Decrease from 1996 due to eligible producers and milk not pooled

Pacific Northwest: December Producer Milk and Producer Numbers



Southwestern Idaho Eastern Oregon: December Producer Milk and Producer Numbers



MONTHLY SELECTED STATISTICS

Minimum Class Prices (3.5% B.F.)	PACIFIC NORTHWEST				ARIZONA 2/			
	Oct 2007	Sep 2007	Oct 2006	Sep 2006	Oct 2007	Sep 2007	Oct 2006	Sep 2006
Class I Milk (\$/cwt.)	\$23.49	\$23.81	\$14.32	\$12.75	\$23.94	\$24.26	\$14.77	\$13.20
Class II Milk (\$/cwt.)	21.90	22.16	11.79	11.74	21.90	22.16	11.79	11.74
Class III Milk (\$/cwt.)	18.70	22.07	12.32	12.29	18.70	22.07	12.32	12.29
Class IV Milk (\$/cwt.)	21.31	21.61	11.51	11.10	21.31	21.61	11.51	11.10
Producer Prices								
Producer Price Differential (\$/cwt.)	\$ 2.21	\$ 1.58	\$ 0.20	\$(0.40)	+	+	+	+
Butterfat (\$/pound)	1.4092	1.5101	1.4149	1.4191	+	+	+	+
Protein (\$/pound)	4.1695	4.3929	2.0775	2.1346	+	+	+	+
Other Solids (\$/pound)	0.2286	0.2890	0.2026	0.1649	+	+	+	+
Uniform Skim Price (\$/cwt.)	+	+	+	+	17.13	17.35	8.56	8.19
Uniform Butterfat Price (\$/pound)	+	+	+	+	1.4411	1.5457	1.4237	1.3884
Statistical Uniform Price (\$/cwt.) . .	\$20.91	\$21.65	\$12.52	\$11.89	\$21.57	\$22.15	\$13.24	\$12.76
Producer Data								
Number of Producers	688 *	688	769	621	93 *	93	94	93
Avg. Daily Production (lbs.)	27,116 *	27,501	26,025	26,191	107,279 *	101,281	93,949	89,571
Number of Handlers								
Pool Handlers	27	26	29	26	7	7	7	7
Producer-Handlers	5 *	5	6	6	1 *	1	1	1
Other Plants w/ Class I Use	23 *	23	26	25	19 *	19	25	24
Producer Milk Ratios								
Class I	35.04%	31.42%	31.86%	39.05%	39.93%	39.28%	42.41%	46.18%
Class II	7.39%	6.95%	7.28%	8.51%	8.71%	9.35%	10.40%	8.17%
Class III	31.18%	31.29%	30.20%	6.39%	29.44%	31.92%	36.47%	41.06%
Class IV	26.39%	30.34%	30.66%	46.05%	21.92%	19.45%	10.72%	4.59%

+ Not Applicable. * Preliminary.

MONTHLY SUPPLEMENTAL STATISTICS

Producer-Handler Data	Sep 2007	Aug 2007	Sep 2006	Aug 2006	Sep 2007	Aug 2007	Sep 2006	Aug 2006
Production	25,673,577	28,641,856	22,020,680	21,424,814	R	R	R	R
Class I Use	19,122,009	20,901,829	17,296,484	16,354,734	R	R	R	R
% Class I Use	74.48%	72.98%	78.55%	76.34%	R	R	R	R
Class I Route Disposition In Area								
By Pool Plants	160,147,147	163,614,612	171,222,764	168,622,464	91,882,669	96,718,315	100,471,693	102,033,764
By Producer-Handlers	6,010,383	6,522,990	8,031,374	7,959,066	1/	1/	1/	1/
By Other Plants	4,349,061 *	5,152,637	4,507,623	4,846,479	4,770,988 *	5,238,758	4,526,551	4,711,371
Total	170,506,591	175,290,239	183,761,761	181,428,009	96,653,657	101,957,073	104,998,244	106,745,135

* Preliminary. R = Restricted. Not included. 1/ Restricted. Included with other plants. 2/ Due to the implementation of the Milk Regulatory Equity Act of 2005, the name of Federal Order 131 changed from the "Arizona-Las Vegas Order" to the "Arizona Order" and Clark County, Nevada, was removed from the marketing area effective May 1, 2006.

MONTHLY STATISTICAL SUMMARY

(Product pounds based upon reports of handlers)

RECEIPTS, UTILIZATION AND CLASSIFICATION OF MILK	PACIFIC NORTHWEST				ARIZONA 2/				
	Oct 2007	Sep 2007	Oct 2006	Sep 2006	Oct 2007	Sep 2007	Oct 2006	Sep 2006	
TOTAL PRODUCER MILK	578,319,931	567,630,263	620,403,447	487,936,887	309,284,710	282,574,022	273,768,325	249,902,608	
RECEIPTS FROM OTHER SOURCES	28,849,758	31,767,260	16,714,409	16,345,339	39,050,401	25,225,504	3,733,552	3,667,711	
OPENING INVENTORY	37,695,516	29,730,482	34,781,207	27,155,200	22,847,511	16,679,475	19,635,219	16,576,546	
TOTAL TO BE ACCOUNTED FOR	644,865,205	629,128,005	671,899,063	531,437,426	371,182,622	324,479,001	297,137,096	270,146,865	
UTILIZATION OF RECEIPTS									
Whole milk	31,361,268	29,476,626	34,489,250	34,077,180	27,537,073	25,272,786	30,436,221	29,661,444	
Flavored milk & milk drinks	15,193,982	11,797,876	15,818,822	12,585,116	7,377,039	6,431,350	7,098,534	7,486,471	
2% milk	69,404,511	64,604,885	67,810,298	68,281,183	38,723,784	34,801,544	37,588,015	32,044,132	
1% milk	28,931,043	26,704,125	27,233,047	27,069,180	14,280,511	12,917,838	13,353,703	13,543,571	
Skim milk	28,010,696	26,121,897	27,991,087	27,820,557	13,353,987	12,005,398	13,246,810	17,273,281	
Buttermilk	1,444,829	1,441,738	1,422,054	1,389,548	510,161	453,753	500,199	462,794	
CLASS I ROUTE DISP. IN AREA.	174,346,329	160,147,147	174,764,558	171,222,764	101,782,555	91,882,669	102,223,482	100,471,693	
Class I dispositions out of area	21,226,011	16,917,864	16,508,876	17,856,752	21,248,771	19,884,434	15,589,886	14,352,376	
Other Class I usage	22,620,145	19,421,309	21,101,402	17,797,721	10,815,318	10,485,627	9,896,624	11,524,593	
TOTAL CLASS I USE.	218,192,485	196,486,320	212,374,836	206,877,237	133,846,644	122,252,730	127,709,992	126,348,662	
TOTAL CLASS II USE	50,581,002	44,331,901	55,131,445	46,346,060	27,794,650	27,113,887	29,292,820	21,695,579	
TOTAL CLASS III USE	189,143,870	191,673,335	187,589,783	31,183,586	93,799,151	90,637,542	99,879,890	103,206,608	
TOTAL CLASS IV USE	186,947,848	196,636,449	216,802,999	247,030,543	115,742,177	84,474,842	40,254,394	18,896,016	
TOTAL ACCOUNTED FOR.	644,865,205	629,128,005	671,899,063	531,437,426	371,182,622	324,479,001	297,137,096	270,146,865	
CLASSIFICATION OF RECEIPTS									
Producer milk:	Class I	202,689,306	178,370,355	197,627,521	190,533,143	123,526,941	110,988,700	116,130,590	115,373,758
	Class II	42,714,760	39,439,747	45,176,760	41,521,413	26,928,075	26,421,941	28,464,840	20,425,195
	Class III	180,305,368	177,604,126	187,378,931	31,183,586	91,044,987	90,188,819	99,838,398	102,621,392
	Class IV	152,610,497	172,216,035	190,220,235	224,698,745	67,784,707	54,974,562	29,334,497	11,482,263
Other receipts:	Class I	15,503,179	18,115,965	14,747,315	16,344,094	61,897,912	41,904,979	23,368,771	20,244,257
	Class II	7,866,242	4,892,154	9,954,685	4,824,647	1/	1/	1/	1/
	Class III	8,838,502	14,069,209	210,852	0	1/	1/	1/	1/
	Class IV	34,337,351	24,420,414	26,582,764	22,331,798	1/	1/	1/	1/
Avg. daily producer receipts		18,655,482	18,921,009	20,013,014	16,264,563	9,976,926	9,419,134	8,831,236	8,330,087
Change From Previous Year		-6.78%	16.33%	-0.87%	-22.96%	12.97%	13.07%	17.50%	14.73%
Avg. daily Class I use		7,038,467	6,549,544	6,850,801	6,895,908	4,317,634	4,075,091	4,119,677	4,211,622
Change From Previous Year		2.74%	-5.02%	8.92%	3.54%	4.81%	-3.24%	39.60%	35.60%

1/ Restricted - Included with Class I. 2/ Due to the implementation of the Milk Regulatory Equity Act of 2005, the name of Federal Order 131 changed from the "Arizona-Las Vegas Order" to the "Arizona Order" and Clark County, Nevada, was removed from the marketing area effective May 1, 2006.

HIGHLIGHTS THIS ISSUE:

- Market Summaries for October 2007
- October 2007 Class Prices
- Class I Price for December 2007
- USDA Reopens Comment Period For Establishment of Dairy Product Mandatory Reporting Program
- History Of Federal Milk Marketing Areas In The Northwest
- Extension of Time to December 17, 2007, to Submit Alternative Proposals to Expand the Pacific Northwest Marketing Area

**EXTENSION OF TIME TO DECEMBER 17, 2007,
TO SUBMIT ALTERNATIVE PROPOSALS TO
EXPAND THE PACIFIC NORTHWEST
MARKETING AREA**

On November 20, 2007, USDA, AMS, Dairy Programs, approved an extension of time to submit additional proposals for a public hearing to expand the Pacific Northwest Marketing Area to December 17, 2007. More information can be found at the following internet addresses:

- http://www.ams.usda.gov/dairy/pnw_expansion/pnw_prop_expansion.htm
- <http://www.fmmaseattle.com/currentnews.htm>