



The Market Administrator's Report

Facilitating the Efficient Marketing of Milk

Pacific Northwest and Arizona Marketing Areas

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Volume 39, No. 9

September 2013

Data for August 2013

MARKET SUMMARIES FOR AUGUST

Pacific Northwest (FO 124)

Producers delivered a total of 645.8 million pounds of milk to the market during August. Daily deliveries averaged 20.8 million pounds, down 11.8 percent from July. An estimated 447 producers delivered milk to the market during the month. Daily deliveries per producer averaged 46,604 pounds, up 17.4 percent from July.

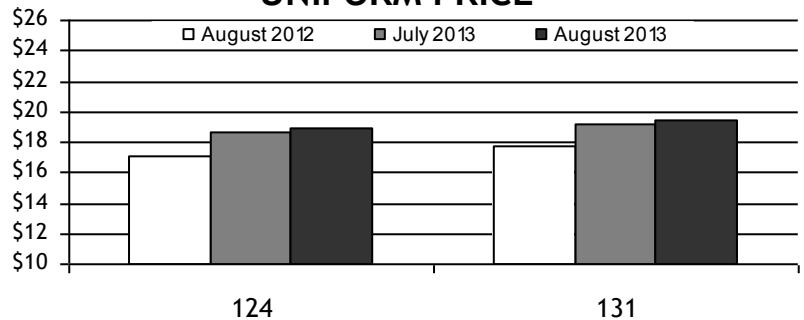
Class I producer milk during August totaled 180.0 million pounds, 27.9 percent of total producer receipts. Daily usage averaged 5.8 million pounds, up 7.2 percent from July. ▼

Arizona (FO 131)

Producers delivered a total of 360.3 million pounds of milk to the market during August. Daily deliveries averaged 11.6 million pounds, down 0.9 percent from July. An estimated 91 producers delivered milk to the market during the month. Daily deliveries per producer averaged 127,734 pounds, down 0.9 percent from July.

Class I producer milk during August totaled 115.9 million pounds, 32.2 percent of total producer receipts. Daily usage averaged 3.7 million pounds, up 7.8 percent from July. ▼

UNIFORM PRICE



Pool Quick Stats

Producer Prices & Component Levels	FO 124		FO 131	
	Jul	Aug	Jul	Aug
Uniform Price (at 3.5%)	\$18.65	\$18.93	\$19.17	\$19.41
Uniform Price (at test)	\$19.34	\$19.77	\$19.11	\$19.38
PPD	\$1.27	\$1.02		
Butterfat	\$1.5693	\$1.5104		
Protein	\$3.2257	\$3.4		n/a
		775		
Other Solids	\$0.3927	\$0.3901		
Uniform Skim			\$14.08	\$14.56
Uniform Butterfat		n/a	\$1.5944	\$1.5319
Butterfat	3.725%	3.738%	3.457%	3.476%
Protein	3.088%	3.123%		
Other Solids	5.767%	5.744%		n/a

HIGHLIGHTS THIS ISSUE

- ✓ Organic Dairy News
- ✓ NASS to Resume Milk Production Surveys
- ✓ Measures of Growth in Federal Milk Order Markets

Federal Order Price Summaries

FINAL CLASS PRICES

The August 2013 Final Class Prices were calculated using AMS commodity price surveys from August 3, 10, 17, 24, and 31, 2013. Current and archived Final Class Price announcements are available at www.fmmaseattle.com/finalprice.htm.

FINAL	Class I (FO124)	Class I (FO131)	Class II	Class III	Class IV	Butterfat	Protein	Other Solids	Nonfat Solids
Jul 2013	\$20.81	\$21.26	\$19.22	\$17.38	\$18.90	\$1.5693	\$3.2257	\$0.3927	\$1.5438
Aug 2013	\$20.78	\$21.23	\$19.27	\$17.91	\$19.07	\$1.5104	\$3.4775	\$0.3901	\$1.5868
Change	(\$0.03)	(\$0.03)	\$0.05	\$0.53	\$0.17	(\$0.0589)	\$0.2518	(\$0.0026)	\$0.0430

ADVANCED CLASS I PRICE

The October 2013 Advanced Price was calculated using AMS commodity price surveys from September 7 and 14, 2013. Current and archived Advanced Price announcements are available at www.fmmaseattle.com/advanceprice.htm.

ADVANCED	Butterfat	Class III Skim	Class IV Skim	Base Skim	Base Class I	Class I (FO124)	Class I (FO131)	Class II Skim	Class II Non-fat Solids
Sep 2013	\$1.5420	\$13.01	\$14.26	\$14.26	\$19.16	\$21.06	\$21.51	\$14.96	\$1.6622
Oct 2013	\$1.4727	\$13.22	\$14.55	\$14.55	\$19.20	\$21.10	\$21.55	\$15.25	\$1.6944
Change	(\$0.0693)	\$0.21	\$0.29	\$0.29	\$0.04	\$0.04	\$0.04	\$0.29	\$0.0322

Commodity Price Summaries

AMS COMMODITY PRICES FOR FINAL CLASS PRICES CALCULATION

	July	August	Change
Cheese	\$1.7142	\$1.7731	\$0.0589
Butter	\$1.4674	\$1.4187	(\$0.0487)
Nonfat Dry Milk	\$1.7272	\$1.7706	\$0.0434
Whey	\$0.5804	\$0.5778	(\$0.0026)

AMS COMMODITY PRICES FOR ADVANCED CLASS PRICES CALCULATION

	September	October	Change
Cheese	\$1.7778	\$1.7739	(\$0.0039)
Butter	\$1.4448	\$1.3876	(\$0.0572)
Nonfat Dry Milk	\$1.7679	\$1.8008	\$0.0329
Whey	\$0.5752	\$0.5791	\$0.0039

CURRENT COMMODITY PRICES

The AMS survey of cheddar cheese prices showed a net decrease in prices received for 40-pound blocks and 500-pound barrels. The survey of 40-pound blocks showed a net decrease of 1.53 cents between the August 17 and the September 14 surveys, to \$1.7470 per pound. The survey of 500-pound barrels (adjusted to 38% moisture) showed a net decrease of 1.26 cents to \$1.7916 per pound.

The AMS butter price showed a net decrease of 3.66 cents between the weeks ending August 17 and September 14 from \$1.4366 per pound to \$1.4000 per pound. The AMS nonfat dry milk showed an increase of 3.35 cents since mid-August to \$1.8048 per pound. The average price for AMS whey showed a net increase of 0.32 cents since mid-August to \$0.5794 per pound.

A current summary of various commodity prices is available at www.fmmaseattle.com/prices.htm. 

Organic Dairy News

ORGANIC DAIRY OVERVIEW

The following is an excerpt from the most recent Organic Dairy Market News.

Organic Milk Products Sales: Agricultural Marketing Service reports Total Organic Milk Products sales for July 2013, 189 million pounds, were up 15.3% from July last year. Organic Whole Milk sales for July 2013, 52 million pounds, were up 20.2% compared with July last year and up 10.5% year-to-date compared with last year. Organic Reduced Fat Milk sales for July, 52 million pounds, were 30.7% above sales one year earlier and 12.2% above year-to-date sales last year. Organic milk products sales are 4.4% of total fluid milk products sales this year through July.

Nationally Advertised Price Comparison: Organic dairy product ad volume is slightly higher than during two weeks ago and close to recent report periods.

Ad volume for organic milk is nearly identical with the last three periods. However, ads for half gallon organic milk declined from last period, to the lowest level since the beginning of May. This decline was offset by organic gallon ad volume being not only the highest level of 2013, but higher than any period of 2010, 2011 or 2012.

Organic milk ads total 73% of all organic dairy ads, followed by organic yogurt ads at 24%, and organic butter, 3%. Advertising information presented is compiled from nearly 14,000 surveyed newspaper supermarket ads for the period September 9, 2013, to September 20, 2013, identifying weekly "specials" and containing organic dairy content. Surveyed ads reflect advertised "specials" and not the range of non-advertised supermarket cooler prices.

Complete results of this bi-weekly survey providing additional graphs, tables, and regional delineation, follow at the end of Dairy Market News, or can be accessed at: <http://www.ams.usda.gov/AMSv1.0/DairyRetailReport>.

Organic Grain And Feedstuff Markets: National organic grain and feedstuff prices are mostly steady. Market activity continues to be slow, due to buyers and sellers waiting for the corn and soybean harvest to begin. Demand for feed grade soybeans remains good but supplies of finished soybean meal are limited. Crop conditions are mixed, with the Eastern Cornbelt being excellent and the Midwest reporting average conditions. A much needed rain was noted across parts of the Midwest late in the trading period. Additional livestock and grain market news information is available at: <http://www.ams.usda.gov/mnreports/lbnof.pdf>. 🐾

Source: USDA. Agricultural Marketing Service, "Dairy Market News" Volume 80, Report 38. Available at www.ams.usda.gov.

INVITATION FOR PUBLIC COMMENTS

The National Organic Standards Board is collecting public comment at www.ams.usda.gov/nosbmeetings in advance of its meeting in Louisville, Kentucky, October 22-24, 2013.

The meeting of the board, which occurs twice a year, provides a public forum for the organic community to weigh-in on issues concerning organic production and processing. The upcoming meeting will take place at the Galt House Hotel, 140 North Fourth Street, Louisville, Kentucky, 40202.

During the meeting, the board will address several petitions pertaining to changes to the National List of Allowed and Prohibited Substances, including several substances for use in aquaculture, streptomycin for use to control fire blight in pears and apples, and glycerin. The agenda of topics and current proposals are available at:

www.ams.usda.gov/nosbmeetings (select "October 22-24, 2013" from the drop-down menu).

Interested persons may visit www.ams.usda.gov/nosbmeetings to view meeting information and board proposals, register for an oral comment slot, and submit and/or view public comments.



USDA News

NASS TO RESUME MILK PRODUCTION SURVEYS

USDA's National Agricultural Statistics Service (NASS) will resume milk production quarterly producer surveys in the new federal fiscal year, which begins October 1, 2013. NASS suspended the surveys in April of this year to meet the budget reductions required by sequestration. The agency uses information gathered in the quarterly surveys along with various sources of administrative data to establish the monthly milk production estimates.

With the quarterly surveys, the dairy cow and milk per cow statistics will once again be available. These are critical data points for interested parties to forecast future milk supply. The program will resume with a late September mailing of the survey form to producers and the release of resulting data on October 21.

Previous announcements about the milk production survey status are available at: www.nass.usda.gov/Newsroom/Notices/index.asp.

Commercial Disappearance

TOTAL MILK AND SELECTED DAIRY PRODUCTS 1/

	Jan-Jun 2012	Change 2/	Jan-Jun 2013	Change 2/
	million pounds	percent	million pounds	percent
MILK				
Milk Production	102,553	3.2	102,456	0.5
Marketings	102,061	3.2	101,966	0.5
Beginning Commercial Stocks 3/	10,983	0.5	12,275	11.8
Imports 3/	1,535	10.7	1,538	0.8
Total Supply 4/	114,579	2.6	115,779	1.9
Ending Commercial Stocks 3/	14,732	10.2	16,893	14.7
Net Removals 3/	-	-	-	-
Commercial Disappearance 4/	99,847	2.1	98,887	(0.4)
SELECTED PRODUCTS 5/				
Butter	875.7	4.3	862.1	(1.0)
American Cheese	2,154.3	0.2	2,170.4	1.3
Other Cheese	3,333.0	1.6	3,393.6	2.4
Nonfat Dry Milk	1,086.7	46.5	824.5	(23.8)
Fluid Milk Products 6/	26,339.2	(1.0)	25,826.6	(2.5)

1/ Commercial disappearance includes civilian and military purchases of milk and dairy products for domestic and foreign use, but excludes farm household use and USDA donations of dairy products. Disappearance is a residual figure and therefore can be affected by any inaccuracies in estimating milk production, on-farm use, stocks, and imports.

2/ From year earlier on a daily average basis.

3/ Milk-equivalent, milkfat basis.

4/ Totals may not add because of rounding.

5/ Commercial disappearance in product pounds.

6/ Sales. Estimate based on actual sales in Federal milk order marketing areas and California. These sales figures have not been adjusted for calendar composition.

Source: USDA. Economic Research Service. Agricultural Marketing Service. "Fluid Milk Products." Available at www.ams.usda.gov.

MEASURES OF GROWTH IN FEDERAL MILK ORDER MARKETS

A recent edition of Dairy Market News included a table that highlighted several measures of growth in Federal milk order markets for selected years. The selected years began with data for 1947, then the table displayed data in five-year increments for 1950 through 1990, then yearly from 1990 to 2012.

The April 2010 *Market Administrator's Report* included an article referencing selective data using the years of 1947, 1960, 1980, 2000 and 2009. This article, and the table on page 5 draws from the similar, updated data set but with limited comparisons.

In 2012, there were 10 Federal orders, comprised of 237 pool handlers and 40,750 producers. Pooled milk totaled over 122.4 billion pounds in 2012, including 43.5 billion pounds used in Class I. The average blend price (at 3.5% butterfat content) was \$18.05 in 2012, and the gross value of all producer receipts totaled over \$22.1 billion.

Source: USDA. Agricultural Marketing Service. "Dairy Market News" Volume 80, Report 36. Available at www.ams.usda.gov.

Measures of Growth in Federal Milk Order Markets

Year	Number of Markets 1/	Number of Pool Handlers 1/	Number of Producers 2/	Receipts of Producer Milk 3/	Blend Price 4/ (at 3.5% Butterfat Content)	Daily Deliveries Per Producer	Gross Value of Receipts of All Producer Milk 5/
	Number	Number	Number	Million Pounds	Dollars per cwt.	Pounds	1,000 dol.
1947	29	991	135,830	14,980	\$4.34	302	682,407
1950	39	1,101	156,584	18,660	\$3.93	326	769,442
1960	80	2,259	189,816	44,812	\$4.47	648	1,989,615
1970	62	1,588	143,411	65,104	\$5.95	1,244	3,963,311
1980	47	1,091	117,490	83,998	\$12.86	1,954	11,007,001
1990	42	753	100,397	102,396	\$13.78	2,796	14,289,567
2000	11	346	69,590	116,920	\$12.11	4,590	14,468,892
2009	10	251	46,677	123,430	\$12.44	7,242	15,856,077
2010	10	251	45,918	126,909	\$16.07	7,572	20,389,201
2011	10	241	43,654	126,879	\$19.87	7,963	25,211,996
2012	10	237	40,750	122,388	\$18.05	8,229	22,091,337

1/ End of year.

2/ Average for year.

3/ Beginning in 1988, due to disadvantageous price situations in some markets, handlers elected not to pool milk that normally would have been associated with the order. This has reduced, sometimes substantially, the volume of producer milk receipts reported for some markets. This can also affect significantly the comparability of other "Measures of Growth" based on this statistic.

4/ Prices are simple averages for 1947-1961 and weighted averages for 1962 to date.

5/ Based on blend (uniform) price adjusted for the butterfat content, and starting in 1988, other milk components of producer milk.

Source: USDA. Agricultural Marketing Service. "Dairy Market News" Volume 80, report 36. Available at www.ams.usda.gov.

Monthly Selected Statistics

PRICE & POOL DATA	PACIFIC NORTHWEST				ARIZONA			
	Aug 2013	Jul 2013	Aug 2012	Jul 2012	Aug 2013	Jul 2013	Aug 2012	Jul 2012
Minimum Class Prices (3.5% B.F.)								
Class I Milk (\$/cwt)	\$20.78	\$20.81	\$18.45	\$17.41	\$21.23	\$21.26	\$18.90	\$17.86
Class II Milk (\$/cwt)	19.27	19.22	15.64	14.51	19.27	19.22	15.64	14.51
Class III Milk (\$/cwt)	17.91	17.38	17.73	16.68	17.91	17.38	17.73	16.68
Class IV Milk (\$/cwt)	19.07	18.90	15.76	14.45	19.07	18.90	15.76	14.45
Producer Prices								
Producer Price Differential (\$/cwt)	\$1.02	\$1.27	(\$0.60)	(\$0.74)	+	+	+	+
Butterfat (\$/pound)	1.5104	1.5693	1.8339	1.6556	+	+	+	+
Protein (\$/pound)	3.4775	3.2257	3.1211	3.0430	+	+	+	+
Other Solids (\$/pound)	0.3901	0.3927	0.3462	0.3123	+	+	+	+
Uniform Skim Price (\$/cwt)	+	+	+	+	\$14.56	\$14.08	\$11.80	\$10.98
Uniform Butterfat Price (\$/pound)	+	+	+	+	1.5319	1.5944	1.8022	1.6276
Statistical Uniform Price (\$/cwt)	\$18.93	\$18.65	\$17.13	\$15.94	\$19.41	\$19.17	\$17.69	\$16.29
Producer Data								
Number of Producers	447	595	439	442	91	91	95	94
Avg. Daily Production (pounds)	46,604	39,708	30,797	31,790	127,734	128,842	110,098	121,360
Producer Milk Ratios								
Class I	27.88%	22.94%	43.41%	39.63%	32.17%	29.60%	37.46%	31.59%
Class II	6.22%	6.74%	11.13%	9.94%	8.83%	9.77%	10.47%	10.42%
Class III	49.37%	44.70%	8.54%	10.73%	29.47%	28.06%	30.39%	27.84%
Class IV	16.53%	25.62%	36.92%	39.70%	29.53%	32.57%	21.68%	30.15%

+ Not Applicable. Preliminary data indicated in **bold**.

Monthly Supplemental Statistics

SUPPLEMENTAL DATA	PACIFIC NORTHWEST				ARIZONA			
	Jul 2013	Jun 2013	Jul 2012	Jun 2012	Jul 2013	Jun 2013	Jul 2012	Jun 2012
Number of Handlers								
Pool Handlers	24	25	22	22	7	7	7	7
<i>Distributing Plants</i>	13	14	14	14	5	5	5	5
<i>Supply Plants 1/</i>	6	6	3	3	1	1	1	1
<i>Cooperatives</i>	5	5	5	5	1	1	1	1
Producer-Handlers	5	5	5	5	0	0	0	0
Other Plants w/ Class I Use	17	16	17	17	21	20	22	22
Class I Route Disposition In Area								
By Pool Plants	149,191,509	149,143,781	157,727,150	160,755,423	81,344,146	77,601,688	84,066,829	82,739,092
By Producer-Handlers	7,181,011	6,726,671	7,193,650	7,167,469	0	0	0	0
By Other Plants	10,089,456	8,892,288	8,242,271	8,631,969	6,518,157	5,877,432	5,368,626	5,526,198
Total	166,461,976	164,762,740	173,163,071	176,554,861	87,862,303	83,479,120	89,435,455	88,265,290
Producer-Handler Data								
% Class I Use	68.40%	65.46%	67.77%	68.37%	0.00%	0.00%	0.00%	0.00%
% of Total In-Area Route Dispositions	4.31%	4.08%	4.15%	4.06%	0.00%	0.00%	0.00%	0.00%

Preliminary data indicated in **bold**. 1/ Includes Cooperative Pool Manufacturing Plants.

Monthly Statistical Summary

RECEIPTS & UTILIZATION	PACIFIC NORTHWEST				ARIZONA			
	Aug	Jul	Aug	Jul	Aug	Jul	Aug	Jul
	2013	2013	2012	2012	2013	2013	2012	2012
Receipts of Milk								
Total Producer Milk	645,785,530	732,414,684	419,110,738	435,584,626	360,338,680	363,464,532	324,239,752	353,643,122
Receipts From Other Sources	11,355,714	9,264,396	14,853,908	10,384,401	4,743,823	3,669,081	5,607,295	5,141,362
Opening Inventory	32,641,602	38,339,051	29,927,478	28,627,826	17,914,590	23,454,115	18,713,563	19,857,544
Total To Be Accounted For	689,782,846	780,018,131	463,892,124	474,596,853	382,997,093	390,587,728	348,560,610	378,642,028
Utilization of Receipts								
Whole milk	35,603,455	32,276,730	33,697,003	32,801,627	24,686,834	24,131,550	24,226,233	23,909,110
Flavored milk & drinks	8,793,799	6,515,712	8,734,174	7,333,733	6,146,018	2,521,531	5,881,346	2,576,808
2% milk	68,159,753	64,735,697	69,070,155	66,798,594	32,505,704	31,443,329	33,306,381	32,721,897
1% milk	24,254,578	22,683,746	25,439,631	24,693,647	15,886,815	13,618,330	16,587,546	14,164,220
Skim milk	22,301,913	21,420,959	24,413,679	24,598,838	10,193,529	9,259,321	11,340,998	10,237,797
Buttermilk	1,529,629	1,558,665	1,518,459	1,500,711	387,021	370,085	376,351	456,997
Class I dispositions in area	160,643,127	149,191,509	162,873,101	157,727,150	89,805,921	81,344,146	91,718,855	84,066,829
Class I dispositions out of area	16,989,395	15,444,792	15,297,729	12,917,958	25,894,159	26,389,175	25,674,544	25,599,657
Other Class I usage	18,199,174	18,074,712	20,302,382	17,875,242	11,932,200	11,720,115	17,608,628	13,493,954
Utilization by Class								
Total Class I Use	195,831,696	182,711,013	198,473,212	188,520,350	127,632,280	119,453,436	135,002,027	123,160,440
Total Class II Use	50,130,365	56,544,089	59,614,437	50,334,583	32,515,451	36,431,760	34,548,281	37,741,932
Total Class III Use	320,697,066	328,266,222	35,803,292	46,840,662	107,043,050	102,822,469	101,313,440	100,370,349
Total Class IV Use	123,123,719	212,496,807	170,001,183	188,901,258	115,806,312	131,880,063	77,696,862	117,369,307
Total Accounted For	689,782,846	780,018,131	463,892,124	474,596,853	382,997,093	390,587,728	348,560,610	378,642,028

CLASSIFICATION OF RECEIPTS	PACIFIC NORTHWEST				ARIZONA			
	Aug	Jul	Aug	Jul	Aug	Jul	Aug	Jul
	2013	2013	2012	2012	2013	2013	2012	2012
Producer milk								
Class I	180,042,493	167,989,264	181,943,025	172,603,206	115,907,775	107,572,541	121,449,833	111,731,453
Class II	40,188,374	49,400,535	46,647,031	43,310,934	31,827,474	35,521,189	33,948,364	36,847,496
Class III	318,797,138	327,364,200	35,788,304	46,724,505	106,201,927	101,977,258	98,521,227	98,445,062
Class IV	106,757,525	187,660,685	154,732,378	172,945,981	106,401,504	118,393,544	70,320,328	106,619,111
Other receipts								
Class I	15,789,203	14,721,749	16,530,187	15,917,144	11,724,505	11,880,895	13,552,194	11,428,987
Class II	9,941,991	7,143,554	12,967,406	7,023,649	1/	1/	1/	1/
Class III	1,899,928	902,022	14,988	116,157	1/	1/	1/	1/
Class IV	16,366,194	24,836,122	15,268,805	15,955,277	10,933,908	15,242,301	10,768,664	13,569,919
Avg. daily producer receipts	20,831,791	23,626,280	13,519,701	14,051,117	11,623,828	11,724,662	10,459,347	11,407,843
Change From Previous Year	54.08%	68.15%	-36.92%	-40.66%	11.13%	2.78%	-7.68%	-0.06%
Avg. daily Class I use	6,317,151	5,893,904	6,402,362	6,081,302	4,117,170	3,853,337	4,354,904	3,972,917
Change From Previous Year	-1.33%	-3.08%	0.31%	-0.62%	-5.46%	-3.01%	0.90%	0.08%

1/ Restricted - Included with Class IV.



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Visit the MA website
www.fmmaseattle.com

FEDERAL ORDER STATISTICS FOR AUGUST

Federal Order Name (Number)	Producer Deliveries	Class I Receipts	Class I Utilization	Class I Price	Uniform Price
	<i>- million pounds -</i>			<i>- per cwt (at location) -</i>	
Northeast (FO 1)	2,130.8	786.0	36.89%	\$22.13	\$20.28
Appalachian (FO 5)	467.6	330.1	70.58%	\$22.28	\$21.35
Florida (FO 6)	231.0	203.1	87.92%	\$24.28	\$23.56
Southeast (FO 7)	497.2	359.4	72.29%	\$22.68	\$21.81
Upper Midwest (FO 30)	2,911.6	307.8	10.57%	\$20.68	\$18.25
Central (FO 32)	1,262.2	418.6	33.16%	\$20.88	\$18.92
Mideast (FO 33)	1,416.0	553.5	39.09%	\$20.88	\$19.32
Pacific Northwest (FO 124)	645.8	180.0	27.88%	\$20.78	\$18.93
Southwest (FO 126)	988.4	363.1	36.73%	\$21.88	\$19.74
Arizona (FO 131)	360.3	115.9	32.17%	\$21.23	\$19.41

For links to Market Administrator's webpages, see www.fmmaseattle.com/dairyreferences.htm.