NATIONAL DAIRY MARKET AT A GLANCE

CME GROUP CASH MARKETS (04/09):

BUTTER: Grade AA closed at $1.5000. The weekly average for Grade AA is $1.4970 (+.0051).

CHEESE: Barrels closed at $1.4400 and 40# blocks at $1.4975. The weekly average for barrels is $1.4385 (+.0835) and blocks, $1.4875 (+.1062).

BUTTER HIGHLIGHTS: The CME cash butter price continues to strengthen and closed the week at $1.5000. This cash price remains the highest since mid January. Churning activities across the country vary, but for the most part, are lighter as Class II cream demand increases. Favorable weather patterns in many parts of the country are contributing to earlier than usual ice cream and mix demand. Butter producers are stating that cream prices are firm, thus it is becoming more difficult for them to procure cream and generate favorably priced butter for current and future needs. Most butter producers are comfortable with their churning schedules and clearing surplus volumes to inventory with confidence. Overall butter buying interest slowed this week as most buyers are assessing their holiday carryover stock levels before re-entering the marketplace. Many retail buyers are stating that feature activity prior to the recent holiday period cleared good volumes of print butter.

CHEESE HIGHLIGHTS: CME Group cash cheese prices continued to rise again this week until Friday when both blocks and barrels declined by more than 1 cent. Current orders are slow to fair from customers using weekly averages and still solid from those using monthly averages. Some extra process orders are being filled for the reopening of summer vacation locations and Memorial Day weekend. Bulk cheese offerings are available for purchase. Some exports are reportedly occurring besides CWT. A second CWT commitment for 3.5 million pounds was announced on April 5. Cheese production remains active as milk supplies increase seasonally. Cumulative 2010 January and February production of cheddar totals 509.4 million pounds, down 6.2 million pounds (-1.2%) from the same start of 2009. Mozzarella output in the first two months of 2010 totals 545.7 million pounds, up 30.2 million pounds (5.9%) from last year. Total cheese output for the two months is 1.619 billion pounds, up 25.1 million pounds (1.6%) from a year ago.

FLUID MILK: Milk production trends across the country are generally typical for this time of the season and milk volumes are on the increase. In many Southern states, milk production is nearing seasonal peak levels and manufacturing facilities are actively processing the volumes. Florida contributed to higher milk volumes further north by increasing out of state shipments to 220 loads, 30 loads more than last week. The continuing reduction in Florida'sseasonal population as spring advances continues to generate milk flows out of state. Further north, favorable weather conditions arecontributing to steady milk output. As the milk volume increases across the country, manufacturing facilities and balancing plants are becoming more active with their processing schedules. In some areas, these operations are already feeling the pressure of increasing milk volumes. Class I demand varies from one area to another as schools continue to observe spring break. Cream markets are steady to firm. Cream demand is starting to gain momentum for Class II ice cream needs. Favorable weather patterns in many parts of the country are contributing to an earlier than usual ice cream and mix buying pattern. Cream prices remain on the firm side with increasing prices for butter and other basing points moving up total cream values. When possible, butter producers continue to absorb as much cream as possible to generate butter stock for current and future needs.

DRY PRODUCTS: Nonfat dry milk markets are firm with prices generally higher from coast to coast. All sides of the trade are looking at the results of the recent global/Dairy Trading event in New Zealand and assessing what those higher prices mean to current and future U.S. pricing. There are many and varied answers. Offerings of U.S. NDM onto the world market are taking place, but sales activity remains light and along expected levels. Buttermilk powder markets are firm with prices generally higher. Churning activity across the country is mixed, thus buttermilk volumes are also variable. Stocks of buttermilk are not overly abundant and for those that have stock, they are holding it with confidence for future needs. Whey powder markets are generally steady although prices are fluctuating slightly higher and lower. Drying schedules are active as cheese production is increasing seasonally at many locations. This increased production has some buyers looking for discounts. The bulk of the trade is contracted with very little spot movement taking place.

ORGANIC DAIRY MARKET OVERVIEW: Organic milk and dairy product sales are enough stronger than expected, that decisions made in February to divert some organic milk for non-organic use over coming months has now been reversed. Some processors report "record sales" over some of the last eight weeks. Other processors have projected sales increases during 2010 in the range of 5% of existing business. The length of the run of recently

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******SPECIALS THIS ISSUE*******

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CME GROUP CASH TRADING

PRODUCT	MONDAY APRIL 05	TUESDAY APRIL 06	WEDNESDAY APRIL 07	THURSDAY APRIL 08	FRIDAY APRIL 09	WEEKLY CHANGE*	WEEKLY AVERAGE#
CHEESE							
BARRELS	$1.4100 (+.0350)	$1.4325 (+.0225)	$1.4550 (+.0225)	$1.4550 (N.C.)	$1.4400 (-.0150)	(+.0650)	$1.4385 (+.0835)
40# BLOCKS	$1.4600 (+.0300)	$1.4800 (+.0200)	$1.4900 (+.0100)	$1.5100 (+.0200)	$1.4975: (-.0125)	(+.0675)	$1.4875 (+.1062)
BUTTER							
GRADE AA	$1.4950 (N.C.)	$1.4950 (N.C.)	$1.4975 (+.0025)	$1.4975 (N.C.)	$1.5000 (+.0025)	(+.0050)	$1.4970 (+.0051)

CHEESE: carload = 40,000 lbs., BUTTER: carlot = 40,000-43,000 lbs. *Sum of daily changes. # Weekly averages are simple averages of the daily closing prices for the calendar week. Computed by Dairy Market News for informational purposes. This data is available on the Internet at WWW.AMS.USDA.GOV/DAIRYMARKETNEWS.

NATIONAL DAIRY MARKET AT A GLANCE

increased organic milk sales has led to cautious optimism that the sales strength transcends filling the pipeline and reflects strengthened demand. In contrast with weak sales of fluid non-organic milk in some regions in recent weeks, organic milk sales were described as "great" by a processor. Nevertheless, the organic milk supply is not uniformly balanced to meet demand throughout the country. Areas of the West continue to have greater supply than desired. For the period March 27 through April 9, 2010, the number of surveyed newspaper ads containing organic dairy content decreased to the lowest level in 2010, 1,847, 20.2% of 9,124 total ads surveyed. This continues the decline noted 2 weeks ago when 2,125 ads appeared, at that time a record for the least organic dairy ads of 2010. Organic milk topped the count with 2,052 total ad listings, up from 1,867 two weeks ago. Organic yogurt was second, with 915 total ad listings. Organic milk ads appeared in each region. Of total milk ads, the greatest concentration continued to be the Southwest, 37.8%, followed by the Midwest with 25.3%. The other regions are: South Central, 15.5%; Southeast, 12.9%; Northeast, 4.2%; and Northwest, 4.2%.

APRIL MILK SUPPLY AND DEMAND ESTIMATES (WAOB): The milk production forecast is raised for 2010 as the pace of herd reduction is reduced from last month. Dairy exports on a skim-solids basis are lowered due to weaker-than-expected sales early in the year. Both fat and skim-solids basis imports are reduced from last month due to weaker-than-expected imports of cheese. Fat and skim stocks are forecast higher for 2010 as cheese stocks have not declined as expected. Product price forecasts are generally lowered from last month as milk production is forecast higher and demand is weaker than expected. The cheese price is reduced as stocks remain high. The butter price forecast is about unchanged from last month as stronger prices in the first half of the year may largely be offset by lower second-half prices as butter production increases. The nonfat dry milk (NDM) price is forecast lower as export demand lags. The whey price is lowered slightly. The Class III price is reduced due to lower cheese and whey prices while the lower price forecast for NDM results in a reduced Class IV price. The all milk price for 2010 is forecast at $15.45 to $15.95 per cwt.

FEBRUARY FLUID MILK SALES (DAIRY PROGRAMS & CDFA): During February, about 4.4 billion pounds of packaged fluid milk products is estimated to have been sold in the United States. This was 0.1% lower than February 2009. After adjusting for calendar composition, sales in February 2010 were 0.1% lower than February 2009. On an individual product basis, after adjusting for calendar composition, sales of organic whole milk, reduced fat milk (2%), low fat milk (1%) and fat-free (skim) milk increased from February 2009, while sales of whole milk, flavored whole milk, flavored fat-reduced milk, organic fat-reduced milk, and buttermilk decreased from a year earlier.

CME GROUP

MONDAY, APRIL 5, 2010

CHEESE — SALES: 2 CARS BARRELS: 1 @ $1.3850, 1 @ $1.4000; 2 CARS 40# BLOCKS: 1 @ $1.4400, 1 @ $1.4500; LAST BID UNFILLED: 1 CAR BARRELS @ $1.4100; 1 CAR 40# BLOCKS @ $1.4600; LAST OFFER UNCOVERED: NONE
NONFAT DRY MILK — SALES: NONE; LAST BID UNFILLED: NONE; LAST OFFER UNCOVERED: NONE
BUTTER — SALES: NONE; LAST BID UNFILLED: NONE; LAST OFFER UNCOVERED: 1 CAR GRADE AA @ $1.4950

TUESDAY, APRIL 6, 2010

CHEESE — SALES: 2 CARS BARRELS @ $1.4300; 1 CAR 40# BLOCKS @ $1.4800; LAST BID UNFILLED: 1 CAR BARRELS @ $1.4325; 1 CAR 40# BLOCKS @ $1.4800; LAST OFFER UNCOVERED: 1 CAR BARRELS @ $1.4500
NONFAT DRY MILK — SALES: 1 CAR GRADE A @ $1.2250; LAST BID UNFILLED: 1 CAR GRADE A @ $1.2300; LAST OFFER UNCOVERED: NONE
BUTTER — SALES: 3 CARS GRADE AA: 2 @ $1.4925, 1 @ $1.4950; LAST BID UNFILLED: 1 CAR GRADE AA @ $1.4925; LAST OFFER UNCOVERED: NONE

WEDNESDAY, APRIL 7, 2010

CHEESE — SALES: 2 CARS BARRELS @ $1.4550; LAST BID UNFILLED: 1 CAR BARRELS @ $1.4550; 1 CAR 40# BLOCKS @ $1.4900; LAST OFFER UNCOVERED: NONE
NONFAT DRY MILK — SALES: NONE; LAST BID UNFILLED: 1 CAR GRADE A @ $1.2400; LAST OFFER UNCOVERED: NONE
BUTTER — SALES: NONE; LAST BID UNFILLED: 1 CAR GRADE AA @ $1.4975; LAST OFFER UNCOVERED: NONE

THURSDAY, APRIL 8, 2010

CHEESE — SALES: 1 CAR BARRELS @ $1.4550; LAST BID UNFILLED: 1 CAR 40# BLOCKS @ $1.5100; LAST OFFER UNCOVERED: NONE
NONFAT DRY MILK — SALES: 4 CARS GRADE A @ $1.2650; LAST BID UNFILLED: 1 CAR EXTRA GRADE @ $1.1850; LAST OFFER UNCOVERED: 1 CAR GRADE A @ $1.2750
BUTTER — SALES: NONE; LAST BID UNFILLED: NONE; LAST OFFER UNCOVERED: NONE

FRIDAY, APRIL 9, 2010
CHEESE — SALES: 2 CARS BARRELS: 1 @ $1.4525, 1 @ $1.4475; LAST BID UNFILLED: NONE; LAST OFFER UNCOVERED: 1 CAR BARRELS @ $1.4400; 1 CAR 40# BLOCKS @ $1.4975
NONFAT DRY MILK — SALES: 1 CAR GRADE A @ $1.2650; LAST BID UNFILLED: 1 CAR EXTRA GRADE @ $1.1900; LAST OFFER UNCOVERED: NONE
BUTTER — SALES: NONE; LAST BID UNFILLED: 1 CAR GRADE AA @ $1.5000; LAST OFFER UNCOVERED: NONE

CME GROUP CASH NONFAT DRY MILK: Extra Grade closed the week at $1.1900 and Grade A at $1.2650. The last price change for Extra Grade was on 04/09/10 and Grade A was on 4/08/10. The weekly average for Extra Grade is $1.1740 (+.0277) and Grade A is $1.2450 (+.0550).

BUTTER MARKETS

NORTHEAST

Demand for cream is characterized as remaining "surprisingly strong". CME Group butter trading this week remained unchanged through Tuesday's close at $1.4950. This is in contrast with one year ago, when butter closed at $1.1900. Multiples mid-week were about the same as last week although, there was a short-lived dip in some areas last Friday, typical for a pre-holiday Friday, which untypically reversed before Saturday. One spot market seller commented that unanticipated demand prompted a quick reversal of the initial mistaken decision on Friday to reduce spot cream multiple asking prices by 4 points, anticipating weaker demand. Due to unanticipated stronger demand, within an hour the asking price was increased by 2 points and shortly, was back 2 more points to the original multiple. By Saturday, all the available cream had moved at the original multiple, 137. An explanation offered is a number of butter manufacturers maintaining "hand-to-mouth" inventory levels. This resulted in atypical competition for cream for post holiday manufacturing, when butter manufacturers were faced with ice cream manufacturers resuming production with a "vengeance" in some of the East, as well as continuing strong cream cheese manufacturing. Cream demand by Class II product manufacturers coupled with somewhat low butter inventories have acted in unison to keep cream demand robust. This week, some Northeast balancing plants report extremely high cream demand from the customer base, keeping cream off spot markets. In the South, some plants may explore spot cream sales beginning Wednesday afternoon and hope to hold current multiples. Cumulative 2010 butter production through February was 5.4% below cumulative year production for the same period for 2009. February 2010 monthly U.S. butter production totaled 141.1 million pounds, down 12.9% from January and down 3.1% compared to February 2009. Atlantic region butter production in February 2010 totaled 14.5 million pounds, down 8.5% from January, but 16.2% more than February 2009.

CENTRAL

The cash butter price at the CME remains firm and increased 1/2 cent in the past five trading sessions to settle at $1.4975 at midweek. Butter producers indicate that churning has been seasonally active as cream supplies became more available over the past week as Class II product production eased prior to the holiday weekend. Although the holiday has passed, Class II demand has not increased that significantly, thus cream remains available. Many butter producers thought that once the holiday passed, Class II demand would once again resume, but that demand is slow in developing. Active churning is generating fresh butter stock, but a significant portion of this production is entering inventory programs. Butter demand early in the week is still slow to develop as buyers assess their carryover volumes prior to re-ordering. Some of those that are returning to the marketplace indicate that feature activity at retail cleared good volumes of print butter. Food service buyers indicate that they will probably be placing lighter orders for the near term as away from home eating patterns typically ease after the Easter/Passover holiday weekend. Spot bulk butter prices range from 2 - 4 cents over various pricing bases and averages per pound.

WEST

Wednesday's butter trading at the CME Group closed up $.0025 to $1.4975. Sales activity is light to moderate with three loads sold so far this week. The butter price has remained steady or appreciated at the CME Group since March 15, 2010. Butter churns are operating on busy schedules. Additional cream has been freed up temporarily after holiday product orders were shipped. Churns are actively taking advantage of any additional cream supplies. Holiday sales were reported as moderate. Stronger cash butter markets have increased the desire to manufacture product. Some buyers are buying ahead to insure adequate supplies for later use. Butter futures are at a premium to cash and producers are satisfied to build inventories for later use. Current inventories are handling contract needs. According to the CME Group, weekly butter stocks increased slightly by 266,000 pounds last week to stand at 55.5 million pounds. This is counter to the downward trend of the last four weeks, if only minimally. This total compares to 80.3 million pounds in 2009 and 117.5 million pounds in the comparable week in 2008. According to the NASS *Dairy Products* report, February butter production for the U.S. totals 141.1 million pounds, down 3.1% or 4.5 million pounds from February of last year. Output in the Western region totals 73.4 million pounds, up 11.9% from February 2009. The West produced 52% of the butter in the U.S. in February. Cumulative output for the year for the U.S. is 303.2 million pounds, down 5.4% from the same period in 2009. This works out to a decline of 17.2 million pounds. The *Commercial Disappearance* for selected Dairy Products for November 2009-January 2010 for butter stood at 445.1 million pounds, down 2.6% from the same period last year as reported by the Economic Research Service.

NASS DAIRY PRODUCT PRICES

U.S. AVERAGES AND TOTAL POUNDS

WEEK ENDING	CHEESE 40# BLOCKS	CHEESE BARRELS 38% MOISTURE	NDM	BUTTER	DRY WHEY
APRIL 3	1.2866	1.3003	1.0657	1.4524	0.3822
	9,715,947	11,444,511	21,474,008	10,723,701	8,210,217

Further data and revisions may be found on the internet at: http://usda.mannlib.cornell.edu/MannUsda/viewDocumentInfo.do?documentID=1450

CHEESE MARKETS

NORTHEAST

Cheese prices are strong and encouraging production. Price increases for nine consecutive trading days have left CME Group blocks at $1.4800 and barrels at $1.4325 by Tuesday; an increase of 21 cents for blocks and 16 3/4 cents for barrels over the nine day run. This contrasts with one year ago when blocks closed at $1.2525 and barrels at $1.2000. Many manufacturers in the East have increased production, "chasing a rising market", in one view. Production is not only driven by the rising market, but by the increasing volume of milk balancing plants are dealing with. Very heavy volume has led to some auxiliary cheese plants normally closed but occasionally used primarily to handle high milk volume, to be opened. The convergence of abundant milk availability with strong prices is welcomed by cheese manufacturers. NASS reports that February 2010 total cheese production in New York was 55.3 million pounds, 4.0% less than January and 2.0% less than February 2010. Pennsylvania produced 32.6 million pounds in February, 2.9% less than one month earlier, but 4.5% more than one year ago. Vermont produced 8.8 million pounds, 11.2% less than last month and 22.2% less than February 2009. Focusing on Italian cheese, in February, New York ranked 3rd among individually reported states, producing 28.5 million pounds, 7.8% less than last month and 4.0% less than February 2009. Pennsylvania followed in Italian cheese production, with 21.5 million pounds produced in February 2010, 6.8% less than January, but 5.2% more than February 2009. Total January cheese production in the Atlantic region was 104.9 million pounds, down 4.7% from January and 2.4% less compared to the same period last year. Atlantic region cheese production accounted for 13.5% of total U.S. production. Total U.S. cheese production in February 2010 totaled 777.2 million pounds, 7.7% below January, but 1.0% more than February 2009. Cumulative 2010 (two month) U.S. Cheese production through February was 1.6% greater than comparable 2009 production.

WHOLESALE SELLING PRICES: DELIVERED,
DOLLARS PER POUND (1000 - 5000 POUNDS MIXED LOTS)

Cheddar 40# Block	:	1.7100-1.9850
Process 5# Sliced	:	1.4475-1.7575
Muenster	:	1.7300-1.9275
Grade A Swiss Cuts 10 - 14#	:	3.1375-3.4600

MIDWEST

The cheese market seems to be reacting to factors other than supply and demand. A lot of experienced cheese traders are confused by recent increases and are wondering what they missed that would generate such a large cumulative cheese increase. A second CWT commitment for 3.5 million pounds is inadequate by itself to support recent price increases and may just replace other would-be exports. The spread between U.S. and world cheese prices has narrowed with recent increases. The problem seems to be the lack of firms willing to sell cheese on the CME Group cash market. Basically for experienced cheese marketers, the larger the cumulative price increase, the more likely prices will see another sharp price correction before summer. The price increases are causing new orders to decline and product put away at lower prices earlier to be resold at a profit. Business for some firms is slow and plants are operating on reduced hours. Orders for finished product are mostly light as no one wants to promote at current prices. Mothers Day, the next holiday on the calendar, is generally not considered a big cheese consumption event. Offerings continue to increase as plant inventories build. Cheese production remains seasonally active in the Upper Midwest.

WISCONSIN WHOLESALE SELLING PRICES: DELIVERED,
DOLLARS PER POUND (1000 - 5000 POUNDS MIXED LOTS)

Process American 5# Loaf	:	1.7150-1.8950
Brick And/Or Muenster 5#	:	1.8925-1.9600
Cheddar 40# Block	:	1.8000-2.5650
Monterey Jack 10#	:	1.8575-2.5650
Blue 5#	:	2.1825-2.6800
Mozzarella 5 - 6# (Low Moisture, Part Skim)	:	1.7275-2.6650
Grade A Swiss Cuts 6 - 9#	:	2.5100-3.3300

WEST

Cheese prices at the CME Group this week continued to climb higher. Prices on Barrels and Blocks have increased on sales or bids for the last 10 trading sessions. Barrels on Wednesday were up $.0225 to $1.4550. Prices on 40 lb. Blocks were $.0100 higher to $1.4900 on Wednesday. Barrels experienced light to moderate sales of 2 loads each day this week. Blocks had 3 sales for the week so far. Since March 5, the price has increased $.2050 from $1.2500 for Barrels. Blocks have increased $.2225 from $1.2675 on March 11, 2010. Cheese manufacturing plants are seeing steady production with some extra available milk due to lower Class I demand and the beginning of spring flush across the West. Mozzarella sales are increasing in some areas. Cheddar production levels are being adjusted at some plants so as to match production with sales. Contract sales are easily met with current inventory. Spot demand is cautious as prices have increased. Buyers are filling immediate needs and determining best pricing strategies for future needs. According to the NASS *Dairy Products* report, total cheese production in the U.S. in February reached 777.2 million pounds, up 1% or 7.4 million pounds from last year. February total cheese production in the Western region was 322.3 million pounds, up 0.9% from February 2009. The West produced 41.5% of all the cheese in the U.S. in February. Cumulative output for the U.S. for the year is 1.6 billion pounds, up 1.6% from the same period in 2009. This is an increase of 25.1 million pounds. Swiss output for the U.S. in February is 24.6 million pounds, up 3.9% or 0.9 million pounds from last year. USDA's Economic Research Service reports that *Commercial Disappearance* of American Cheese for November 2009-January 2010 stood at 1,023.5 million pounds, 5% less or down 54.4 million pounds from the same period last year. Disappearance of Other Cheese for November 2009-January 2010 was 1,598.1 million pounds, 7.7% higher or 113.9 million pounds more than the same period last year. Overall cheese disappearance for the period was up 2.3% or 59.5 million pounds.

WHOLESALE SELLING PRICES: DELIVERED, DOLLARS PER POUND
(1000 - 5000 POUNDS MIXED LOTS)

Process 5# Loaf	:	1.4800-1.7375
Cheddar 40# Block	:	1.5150-1.8675
Cheddar 10# Cuts	:	1.6950-1.9150
Monterey Jack 10#	:	1.7050-1.8650
Grade A Swiss Cuts 6 - 9#	:	2.6850-3.1150

FOREIGN

Wholesale prices for all domestic varieties of foreign-type cheese except Swiss Cuts Switzerland adjusted upward this week driven by increasing CME Group weekly averages for cheese block trading. Imported cheese prices remain unchanged. The Class III price released last Friday moved domestic Swiss down. NASS reports that domestic Swiss production during February 2010 totaled 24.6 million pounds, 9.6% less than January, but 3.9% more than February 2009.

WHOLESALE SELLING PRICES: FOB DISTRIBUTORS DOCK
DOLLARS PER POUND (1000 - 5000 POUNDS, MIXED LOTS)

	NEW YORK	
VARIETY	IMPORTED	DOMESTIC
Blue	2.6400-5.3900	1.8500-3.3375*
Gorgonzola	3.6900-6.6900	2.3525-2.6125*
Parmesan (Italy)	-0-	3.2575-3.4600*
Provolone (Italy)	3.4400-5.9900	1.8925-2.0500*
Romano (Cows Milk)	-0-	3.0400-5.1825*
Sardo Romano (Argentine)	2.8500-3.6900	-0-
Reggianito (Argentine)	3.2900-3.5300	-0-
Jarlsberg-(Brand)	2.9500-4.6900	-0-
Swiss Cuts Switzerland	-0-	3.2300-3.5525*
Swiss Cuts Finnish	2.5900-2.8500	-0-

* = Price change.

WEEKLY COLD STORAGE HOLDINGS-SELECTED STORAGE CENTERS IN THOUSAND POUNDS - INCLUDING GOVERNMENT STOCKS

	BUTTER	CHEESE
04/05/10	11,111	126,264
04/01/10	11,157	125,771
CHANGE	-46	493
%CHANGE	N.C.	N.C.

FLUID MILK AND CREAM

EAST

Spot shipments of Grade A milk into or out of Florida and other Southeastern states

	THIS WEEK		LAST WEEK		LAST YEAR	
	IN	OUT	IN	OUT	IN	OUT
FLORIDA	0	220	0	190	0	215
SOUTHEAST STATE	0	0	0	0	0	0

Throughout the East, fluid milk sales are reported to be "stagnant" or "flat". At a time when the flush is moving north up the region, now well into Pennsylvania and some parts of New York, this has left most balancing plants challenged to handle the supply. New England is still some weeks away from the anticipated peak of the flush expected later in May and thus, is not as inundated as other parts of the East. However, even in New England, the pressure from flat fluid milk demand is a factor. Drying is heavy and cream sales have been unusually heavy to both Class II and cheese plants. Cream is described as "flying out the door". In the Southeast, milk sales have been "off" for about 3 weeks. Milk which had been expected to flow from the region on a regular customer basis to the Northeast, has slowed due to higher milk volumes already there. Auxiliary seasonal plants have opened in the Southeast to handle volume. Some cheese plants have also helped by taking unusually high volumes of milk, encouraged by higher cheese prices. Basically, the system is quite full and this has caused back-ups due to fuller inventory levels at intended receiving plants. Another temporary complication last week, was a plant break-down in the South, which has now been re-opened. Florida contributed to higher milk volumes further North by increasing shipments out of the state to 220 loads, up 30 loads from a week earlier. The continuing reduction in Florida's seasonal population as Spring advances continues to generate milk flows out of the state. Cream sales remained strong, even over the holiday weekend in some areas. One seller maintained 137 multiples and sold out by Saturday. Multiples generally topped at 137 down to the lower 130's, with some pockets of upper 120's where supply is heavy and manufacturing locations relatively sparse. Ice Cream production in the Atlantic region in February totaled 13.7 million gallons; 2.1% more than January, but 11.7% less than February 2009. Pennsylvania's ice cream production for February totaled 2.0 million gallons, down 9.5% from January and 13.1% lower than year ago levels. Yogurt production (plain and flavored) for February totaled 314.6 million pounds, down 7.3% from January, but 0.2% higher compared to the same period last year. Cumulative 2010 production through February totaled 653.8 million pounds, 5.4% higher than through February 2009.

FLUID CREAM AND CONDENSED SKIM PRICES IN TANKLOT QUANTITIES

SPOT PRICES OF CLASS II CREAM, $ PER LB BUTTERFAT

F.O.B. PRODUCING PLANTS: NORTHEAST	-	1.8947-2.0439
F.O.B. PRODUCING PLANTS: UPPER MIDWEST	-	1.9395-1.9842

PRICES OF CONDENSED SKIM, DOLLARS PER LB. SOLIDS,
F.O.B. PRODUCING PLANTS:

NORTHEAST - CLASS II - INCLUDES MONTHLY FORMULA PRICES	-	1.00 - 1.12
NORTHEAST - CLASS III - SPOT PRICES	-	1.20 - 1.24

MIDWEST

Class I demand remained sluggish for most bottlers as some schools are out on break this week. Retail features were helping sales including at least one at $0.99 with coupon and $10 purchase, but not enough to offset the school business. Class II demand was generally at lower levels after the holidays. Some extra cream was still moving to cream cheese accounts but ice cream production was running much heavier as recent temperatures in the 70's and 80's last week, and in some locations again this week, stimulated ice cream demand. Cream offerings have tightened after the holiday weekend and when combined with higher butter prices, cream prices are higher. Some ice cream is being put into storage for later sale while much is going to fill orders. Churning is lighter seasonally, heaviest on the weekends when cream prices are usually lower. Manufacturing milk interest is steady at best. Some plants are starting to see cheese inventories building as sales slow so some operators are trying to keep from adding to the pile, by trying to sell milk or not buy extra. Many long time cheese traders are surprised by recent strength in the cheese market and wonder what is behind recent price increases in the face of another couple of months of seasonal increases in milk receipts. While fluid intakes continue to grow, more operations are seeing a more noticeable decline in components. The holiday weekend seemed to only cause a small blip in manufacturing volume as the plants that closed for a long weekend were back early in the week. In many grazing areas, cows are out on pasture but slow grass growth is keeping cows on regular feed in Wisconsin. Early to midweek rains have stopped any early fieldwork as well as reducing the fire hazard though some locations only received limited amounts. Light snow followed rain on April 7 – 8 as cooler temperatures returned. Some small grains were planted and anhydrous knifed in but cool soil temperatures and the early April calendar has kept many corn planters from running. Wet fields in some more central locations such as Illinois have slowed planting.

WEST

The March 2010 4a price (butter/powder) in CALIFORNIA is $12.84, unchanged from February, but $3.17 higher than last year. This compares to the Federal Order Class IV price for March 2010 at $12.92. The March 2010 4b price (cheese) is $11.13, $1.82 lower than February but $0.68 higher than last year. This compares to the Federal Order Class III price for March at $12.78. CALIFORNIA milk production is building slowly higher. In general, weather patterns have been favorable for milk cows in the state. The impact of sustained low milk prices remains the main issue of the producers in the state. Decisions involving money are often being diverted to later times as producers look to get through this prolonged period. Higher dairy product commodity prices should be providing some relief in the near term as those prices work into the milk pricing formulas. Processing plants worked well over the holiday weekend with limited issues. Fluid milk orders are steady. ARIZONA milk output is building higher seasonally and is thought to be near the top of the spring flush. Weather has been nearly ideal for milk production and helped to close the gap from year ago levels. Class I needs and sales are steady. Retail stores continue to feature specials on gallons. NEW MEXICO milk production continues to move higher on a weekly basis, continuing the trend of the past month. Weather conditions are favorable for milk growth. Economic conditions remain unfavorable and continue to impact the industry. Plants are running on expected schedules and handling more local milk. Fluid milk needs are mostly steady to mixed and regaining normalcy following the spring break season. Western CREAM markets are steady to firm. While multiples are holding mostly steady, the increases in butter prices and other basing points have moved up total cream values. While the product mix has moved away from some cream based items after the spring holidays, there is more cream beginning to move to regional and out of area ice cream accounts. Additional cream is welcomed into butter plants as they rebuild holdings for later needs. CME Group butter prices were 0.5 cents higher from a week ago to close at $1.4975 on Wednesday, April 7. Cream multiples are steady and range 115-127 FOB and vary depending on class usage and basing points. In the PACIFIC NORTHWEST milk production levels are beginning to trend higher. Receipts at milk handling plants are adequate for contracted needs. Surplus supplies are going to dryers as needs are reached at cheese plants. Production capacity in the region is adequate for current needs. Spring fieldwork is beginning between rains and alfalfa fields are greening up. Early harvest is still a ways off in most of the area. Where they are utilized, pastures for grazing are looking good. Finances continue to weigh on producers. Recent increases in cheese and other cash markets have helped to buoy spirits at the farm level. Replacement heifer prices at auction recently were mostly steady. Supreme quality heifers ranged $1200-$1400. UTAH and IDAHO had some early spring storm activity this week. Wind and rains were common with snow in some instances. Higher elevations saw heavier snows, which will help summer water levels. Weather conditions were not detrimental to milk production or handling schedules. Manufacturing capacity in the region is handling current milk supplies. Hay prices for new crop have yet to be determined. Dealers are cleaning up last year's supplies in anticipation of new stocks. Many dairies continue to buy forage on an as needed basis. Replacement heifer prices in Utah at auction were steady to firm compared to recent sales. The top heifer at auction was $1510, while the top 50 heifers averaged $1350.

NDM, BUTTERMILK & WHOLE MILK

Prices represent carlot/trucklot quantities for domestic and export sales packaged in 25 kg. or 50 lb. bags, or totes, spray process, dollars per pound.

NONFAT DRY MILK - CENTRAL AND EAST

CENTRAL: The NDM market is steady to firm. While more condensed skim and milk was available to dryers over the holiday weekend, producers are holding product with confidence, in part due to the stronger prices on the world market. Drying is mostly limited to low heat to maximize plant throughput. Inventories are in good shape for most producers. More buyers are interested in securing product for use later in the year. February 2009 nonfat dry milk production in the Central region totaled 10.2 million pounds, an 8.6% decrease from one month ago, and 31.5% lower than one year ago. The March 2010 Dairy Market News average of the mostly price series for Central nonfat dry milk, low/ medium heat, was $1.1130 compared to $1.2050 one month ago and $0.8418 in March 2009.

EAST: Eastern nonfat fat milk prices increased this week, during which New Zealand auction prices reached higher levels not generally anticipated pre-auction. The significance of higher world prices is now being assessed, but higher Eastern NDM prices on limited spot market activity is the first reaction within the region. Drying activity is steady in some locations and increased in others as plants seek to move higher milk supplies through the system. The latest NASS Dairy Products report indicates nonfat dry milk production during February totaled 116.8 million pounds, down 4.9% from February 2009 and 9.2% lower than last month. Production in the Atlantic region totaled 15.4 million pounds, a 5.3% decrease from one year ago and 1.1% less than one month ago. Month ending stocks, at 147.9 million pounds, are 21.7% below last year, but 7.1% more than a month ago.

DAIRY PRODUCTS: NASS's *Dairy Products* report shows production of human food NONFAT DRY MILK during February 2010 totaled 116.8 million pounds, down 9.2% from January 2010 production and 4.9% lower than February 2009. Month ending stocks, at 147.9 million pounds, are 7.1% higher than a month ago but 21.7% lower than one year ago. Cumulative 2010 nonfat dry milk powder production totals 245.4 million pounds, compared to 277.6 million pounds in 2009, a 12% decrease in production. Production of SKIM MILK POWDERS, which includes protein standardized and blended product, totaled 22.0 million pounds, 7.0% higher than one month ago but 2.9% lower than production one year ago.

F.O.B. CENTRAL/EAST: Includes EXTRA GRADE and GRADE A

LOW/MEDIUM HEAT:	1.1800 - 1.2300	MOSTLY: 1.1900 - 1.2300
HIGH HEAT:	1.2600 - 1.3300	

NONFAT DRY MILK - WEST

Low/medium heat NDM prices are trending higher in light to moderate trading. The market undertone is firm. All sides of the trade are looking at the results of the NZ auction prices and assessing what those higher prices mean to current and future U.S. pricing. There are many and varied answers. Offerings of NDM onto the world stage are taking place, but sales activity remains light and along expected levels. Regional market activity is generally light to moderate with limited spot movement. Production levels are trending seasonally higher and reflecting higher milk receipts in the region as well as improved solid's levels. High heat prices are also trending higher in limited trading. The market tone is firm and reflects light offerings and limited demand. There are not many surprises for the high heat market with most movements going along as planned. Production is dialed in to current needs with little extra being made or held. U.S. NDM production in February 2010 totaled 116.8 million pounds, 4.9% lower than last year. NDM production in the Western region in February totaled 91.3 million pounds, down 0.5% from last year. The West produced 78% of the U.S. total in February. U.S. manufacturers' stocks of NDM at the end of February were reported at 147.9 million pounds, 21.7% lower than a year earlier but 7.1% higher than January. U.S. skim milk powders (SMP) production in February totaled 22.0 million pounds, 2.9% less than last year.

F.O.B. WEST: Includes EXTRA GRADE and GRADE A

LOW/MEDIUM HEAT:	1.0750 - 1.2200	MOSTLY: 1.1100 - 1.1650
HIGH HEAT:	1.1200 -1.2550	

DRY BUTTERMILK - CENTRAL AND EAST

CENTRAL: The buttermilk market is steady to firm. Churning is generally lighter as cream interest is stronger from ice cream accounts. More buttermilk is also moving as condensed so drying schedules are mostly lighter. Producers are holding current inventory with confidence as some stocks are committed to cover commitments later in the year. The February 2010 Dairy Market News average of the price series for Central and East dry buttermilk was $1.0192 compared to $1.1508 one month ago and $0.7455 in February 2009.

EAST: Dry buttermilk prices increased in the East. Spot market activity was light, but certain, as to stronger prices. The market has been trailing NDM so the strength this week in NDM helped move dry buttermilk. NASS reports, February dry buttermilk production totaled 7.7 million pounds, down 17.8% from last month, but 15.0% higher for the same period last year. February 28 dry buttermilk stocks, at 12.9 million pounds, are 86.4% above February last year, but 3.5% lower than last month.

DAIRY PRODUCTS: NASS *Dairy Products* reports production of dry buttermilk during February 2010 totaled 7.7 million pounds, 17.8% less than January 2010 production, and 15.0% more than production one year ago. Cumulative 2010 dry buttermilk production totals 17.0 million pounds, 19.9% more than during the same time span of 2009. Month ending stocks of dry buttermilk, at 12.9 million pounds, are 3.5% lower than one month ago but 86.4% higher than one year ago.

F.O.B. CENTRAL/EAST: . 9600 - 1.1100

DRY BUTTERMILK - WEST

Dry buttermilk prices continue to trend higher. The market tone is steady to firm with good interest for the current light offerings. Supplies have tightened as the pricing levels increased over the past month. Drying schedules are still active in the region as butter churning is steady to higher as cream volumes build. Stocks are light to moderate and being held with more confidence as market prices improve. Buttermilk powder production in February 2010 for the U.S. totals 7.7 million pounds, up 15.0% from last year. Buttermilk stocks at the end of February are 12.9 million pounds, up 86.4% from last year but 3.5% lower than last month.

F.O.B. WEST: . 9200 - .9725 MOSTLY: .9400 - .9600

DRY WHOLE MILK - NATIONAL

The whole milk market is generally steady. Higher prices on the Oceania exchange for fall have added support to the market as speculation leads that other world customers may look to the U.S., to source product. Current production is just being made to cover commitments. Most producers are using dryers for low heat NDM to dry the largest share of fluid possible. The March 2010 Dairy Market News average of the range price series for dry whole milk was $1.4809 compared to $1.4295 one month ago and $1.0773 in March 2009. At the most recent Dairy/Trading event in New Zealand, regular dry whole milk prices per pound for the various contract periods andpercent in price changes from the previous auction are: Contract 1, $1.8733, +25%; Contract 2, $1.8347, +21%; Contract 3, $1.7033, +17%.

DAIRY PRODUCTS: NASS's Dairy Products report shows dry whole milk production during February 2010 totaled 4.9 million pounds, down 8.2% from January 2010 but 37.7% more than February 2009. Cumulative 2010 production totals 10.2 million pounds, a 44.7% increase from 2009 production. Month ending stocks, at 6.6 million pounds, are 1.7% lower than a month ago and 4.5% lower than one year ago. The latest Oceania auction results show prices trending higher in the near term.

F.O.B. PRODUCING PLANT: 1.3900 - 1.5500

CALIFORNIA MANUFACTURING PLANTS - NDM

WEEK ENDING	PRICE	TOTAL SALES	SALES TO CCC
April 2	$1.0501	16,164,760	0
March 26	$1.0310	14,965,954	0

Prices are weighted averages for Extra Grade and Grade A Nonfat Dry Milk, f.o.b. California manufacturing plants. Prices for both periods were influenced by effects of long-term contract sales. Total sales (pounds) include sales to CCC. Compiled by Dairy Marketing Branch, California Department of Food and

WHEY, WPC 34%, LACTOSE & CASEIN

Prices represent carlot/trucklot quantities for domestic and export sales packaged in 25 kg. or 50 lb. bags, or totes, spray process, dollars per pound.

DRY WHEY - CENTRAL

The whey market is steady at best. Interest is steady to occasionally lighter. Drying schedules are active as cheese production is increasing seasonally at many locations. Most manufacturers generally have some product available for sale while others are just covering contracted volumes. Human food dry whey production during February 2010 in the Central region totaled 36.1 million pounds. This dry whey production is 13.1% less than January 2010 production but 3.4% higher than February 2009. The March 2010 Dairy Market News average of the mostly price for Central dry whey was $0.3707 compared to $0.3782 one month ago and $0.1705 in March 2009.
DAIRY PRODUCTS: NASS's *Dairy Products* report shows production of HUMAN AND ANIMAL dry whey during February 2010 totaled 78.0 million pounds, 9.3% lower than January 2010, but 4.4% higher that production 1 year ago. Cumulative 2010 dry whey production is 6.6% higher than 2009 production, totaling 163.9 million pounds. February ending stocks of HUMAN FOOD dry whey totaled 41.9 million pounds, 7.5% lower than 1 month ago and 11.6% lower than February 2009.

F.O.B. CENTRAL:	.3000 - .3900	MOSTLY:	.3375 - .3700
F.O.B. CENTRAL: ANIMAL FEED MILK REPLACER:			.2500 - .3550

DRY WHEY - NORTHEAST

Northeast dry whey markets this week reflected a sense of potential tightness as offers were discussed, but few spot market transactions finalized. This left prices unchanged. The latest NASS Dairy Products report shows production of dry whey for human consumption in the Atlantic area totaled 19.8 million pounds, or 26.5% of the nation's total for February of 75.0 million pounds. The Atlantic area's production is 2.8% below last month, but 5.1% higher than production one year ago.

F.O.B. NORTHEAST:	EXTRA GRADE AND GRADE A:	.3825 - .4250

DRY WHEY - WEST

Whey prices in the West were unchanged for the mostly series and narrowed for the range. Increased production along seasonal levels has some buyers looking for discounts. The bulk of the trade is contracted with very little spot movement taking place. Additional product is available as production problems are resolved at a regional plant.
According to the NASS *Dairy Products* report, edible whey production in February totals 75 million pounds, up 7.3% or 5.1 million pounds compared to February 2009. The Western region produced 19 million pounds of whey in February, up 18.3% from last year. The West produced 25.4% of the whey in the U.S. in February. Cumulative total dry whey production for the year in the U.S. is 163.9 million pounds, up 6.6% or 10.1 million pounds from the same period in 2009. Manufacturers' stocks at the end of February for edible whey are 41.9 million pounds, down 11.6% or 5.5 million pounds from last year.

NONHYGROSCOPIC:	.3575 - .4300	MOSTLY:	.3800 - .4200

EVAPORATED MILK - NATIONAL

Canned evaporated milk production during February 2010 totaled 38.8 million pounds, a 1.3% increase in production over January 2010 but 4.5% below February 2009. Manufacturers' end-of-month stocks totaled 61.8 million pounds, 4.0% higher than last month and 3.2% higher than one year ago.

WHEY PROTEIN CONCENTRATE - CENTRAL AND WEST

The WPC 34% market prices are mostly steady to slightly lower. There is good movement into food accounts, but slower passage to feed accounts. The NDM made available for animal feed use continues to compete favorably with WPC 34% on the basis of price and protein content. Production is unchanged at most locations. The spot market is lightly tested. The March 2010 Dairy Market News average of the mostly price series for whey protein concentrate 34% Central and West was $0.9130 compared to $0.9307 one month ago and $0.5435 in March 2009.
DAIRY PRODUCTS: The NASS *Dairy Products* report shows production of HUMAN AND ANIMAL WPC (25.0-49.9% PROTEIN) during February 2010 totaled 19.0 million pounds, 5.5% less than January 2010 production and 5.9% less than production of one year ago. Manufacturers' end-of-month stocks of HUMAN AND ANIMAL WPC (25.0 – 49.9% PROTEIN) totaled 21.0 million pounds, 0.2% more than January 2010 and 6.1% more than February 2009. Cumulative 2010 HUMAN WPC (25.0%-49.9% PROTEIN) production through February, 39.1 million pounds, is 6.7% lower than 2008 production through same time span of 2009.

F.O.B. EXTRA GRADE 34% PROTEIN:	.8300 - .9800	MOSTLY:	.8925 - .9275

LACTOSE - CENTRAL AND WEST

Lactose prices are mostly steady with more quarterly contract pricing finalized. The market tone is unsettled. There are producers that are well contracted and garnering prices on the upper end of the range for their lactose reflecting quality, color, mesh size, relationships, and other factors. On the other end of the range, some producers have lowered prices to secure sales and move inventories. Competition, lower permeate pricing, lower sugar prices, location, and other factors work into their marketing decisions. The February 2010 Dairy Market News average of the mostly price series for Central and West lactose was $0.3484 compared to $0.3500 one month ago and $0.1320 in March 2009.
DAIRY PRODUCTS: The *Dairy Products* report (NASS) shows HUMAN and ANIMAL lactose production during February 2010 decreased 6.9% compared to January 2010, to 62.2 million pounds, but was 20.6% higher than February 2009 production. Cumulative 2010 lactose production totals 129.1 million pounds, 15.9% more than during the same time span in 2009. Month ending stocks, at 66.0 million pounds, are 7.1% more than one month ago, but 29.3% lower than one year ago.

Including spot sales and up to 3 month contracts.
F.O.B. EDIBLE, NON PHARMACEUTICAL .2650 -.4400 MOSTLY:. 3150 -.3600

CASEIN – NATIONAL

Casein markets and prices are generally holding steady. The milk production season in Europe is showing more signs of steady seasonal increases, although milk volumes are often trailing previous years at this time. A slower startup of the new milk production season is causing some milk handlers to be concerned. They are hoping that the spring flush will not come and go quickly which will potentially greatly impact manufactured dairy product projections including casein. At this point, new product production continues to build on a weekly basis. In Oceania, the milk production season is winding down at varying rates with casein output basically finished for the season. Often, casein producers are indicating that casein output was not as positive as projected, but feel that they will be able to meet commitments. Domestic buyers continue to question availability from their suppliers and at this point, most suppliers remain optimistic.

SPOT SALES AND UP TO 3 MONTH CONTRACTS. PRICES ARE F.O.B., U.S. WAREHOUSE FOR EDIBLE NONRESTRICTED AND VARY ACCORDING TO MESH SIZE AND QUALITY.

RENNET:	3.6000 - 4.2000
ACID:	3.6000 - 4.1500

CCC PURCHASES OF DAIRY PRODUCTS (POUNDS)

	FOR THE WEEK OF APRIL 5 – 9, 2010			CUMULATIVE TOTALS		UNCOMMITTED INVENTORIES	
	TOTAL PURCHASES	CONTRACT ADJUSTMENTS	ADJUSTED PURCHASES	SINCE 10/01/09	SAME PERIOD LAST YEAR	WEEK ENDING 04/02/10	SAME PERIOD LAST YEAR
BUTTER							
Bulk	-0-	-0-	-0-	-0-	4,639,010	-0-	-0-
TOTAL	-0-	-0-	-0-	-0-	4,639,010	-0-	-0-
CHEESE							
Block	-0-	-0-	-0-	-0-	-0-	-0-	-0-
Barrel	-0-	-0-	-0-	-0-	-0-	-0-	-0-
TOTAL	-0-	-0-	-0-	-0-	-0-	-0-	-0-
NONFAT DRY MILK							
Nonfat	-0-	-0-	-0-	132,276	211,594,911	-0-	-0-
TOTAL	-0-	-0-	-0-	132,276	211,594,911	-0-	-0-

MILK EQUIVALENT, FAT SOLIDS BASIS, OF ADJUSTED PURCHASES (MILLION POUNDS)

	MILKFAT* BASIS	SKIM** SOLIDS		MILKFAT* BASIS	SKIM** SOLIDS
WEEK OF APRIL 5 - 9, 2010 =	0.0	0.0	COMPARABLE PERIOD IN 2009 =	0.5	25.8
CUMULATIVE SINCE OCTOBER 1, 2009 =	0.0	1.5	CUMULATIVE SAME PERIOD LAST YEAR =	147.7	2,463.5
CUMULATIVE JAN. 1 – APR. 9, 2010 =	0.0	0.0	COMPARABLE CALENDAR YEAR 2009 =	122.5	1,130.0

** Factors used for Fat Solids Basis - Butter times 21.80; Cheese times 9.23; and Nonfat Dry Milk times 0.22*
**Factors used for Skim Solids Basis - Butter times 0.12; Cheese times 9.90; and Nonfat Dry Milk times 11.64

CCC ADJUSTED PURCHASES FOR THE WEEK OF APRIL 5 - 9, 2010 (POUNDS)

	BUTTER	CHEESE		NONFAT DRY MILK
REGION	BULK	BLOCK	BARREL	NONFORTIFIED
CENTRAL	-0-	-0-	-0-	-0-
WEST	-0-	-0-	-0-	-0-
EAST	-0-	-0-	-0-	-0-

CCC ADJUSTED PURCHASES SINCE 10/1/09 AND SAME PERIOD LAST YEAR (POUNDS) AND MILK EQUIVALENT AS A PERCENT OF TOTAL

	BUTTER		CHEESE		NONFAT DRY MILK		MILK EQUIVALENT (%)	
REGION	2009/10	2008/09	2009/10	2008/09	2009/10	2008/09	2009/10	2008/09
CENTRAL	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
WEST	-0-	4,639,010	-0-	-0-	132,276	211,594,911	100.0	100.0
EAST	-0-	-0-	-0-	-0-	-0-	-0-	-0-	-0-
TOTAL	-0-	4,639,010	-0-	-0-	132,276	211,594,911	100.0	100.0

SUPPORT PURCHASE PRICES FOR DAIRY PRODUCTS EFFECTIVE NOVEMBER 1, 2009

BUTTER Bulk $1.05 per pound

CHEESE 40# Blocks $1.13 per pound; 500# Barrels $1.10

NONFAT DRY MILK $.80 per pound

U.S. Dairy & Total Cow Slaughter under Federal Inspection, by Regions, for Week Ending 03/20/10 & Comparable Week 2008

Regions* (000 HEAD)	1	2	3	4	5	6	7	8	9	10	U.S. TOTAL WEEK	U.S. TOTAL SINCE JAN 1	% DAIRY OF ALL WEEK	% DAIRY OF ALL SINCE JAN 1
2010-Dairy	N.A.	0.6	7.8	2.4	16.2	4.0	0.4	N.A.	18.8	3.9	55.3	667.4	47.0	45.4
2009-Dairy	N.A.	0.5	7.1	2.6	17.2	3.8	0.4	N.A.	15.7	5.0	54.1	727.4	48.7	49.7
2010-All cows	N.A.	0.7	9.7	12.7	30.0	18.4	14.2	N.A.	21.1	7.0	117.7	1,469.0		
2009-All cows	N.A.	0.7	8.9	11.1	31.4	16.7	12.9	N.A.	18.3	7.7	111.2	1,463.6		

SOURCE: The slaughter data are gathered and tabulated in a cooperative effort by the Agricultural Marketing Service, The Food Safety and Inspection Service, and the National Agricultural Statistics Service, all of USDA.

CANADIAN DAIRY BREEDING FEMALE IMPORTS

WEEK ENDING	WEEKLY TOTAL	2010 CUMULATIVE TOTAL	WEEK ENDING	WEEKLY TOTAL	2010 CUMULATIVE TOTAL	
March 20	260	3,399	March 27	203	3,602	SOURCE: USDA, APHIS

CLASS III MILK PRICES,(3.5% BF)

YEAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
2006	13.39	12.20	11.11	10.93	10.83	11.29	10.92	11.06	12.29	12.32	12.84	13.47
2007	13.56	14.18	15.09	16.09	17.60	20.17$	21.38	19.83	20.07	18.70	19.22	20.60
2008	19.32	17.03	18.00	16.76	18.18	20.25	18.24	17.32	16.28	17.06	15.51	15.28
2009	10.78	9.31	10.44	10.78	9.84	9.97	9.97	11.20	12.11	12.82	14.08	14.98

FEDERAL MILK ORDER CLASS PRICES FOR 2010 (3.5% BF)

CLASS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
I 1/	15.03	14.84	14.34	13.22								
II	15.22	15.65	14.46									
III	14.50	14.28	12.78									
IV	13.85	12.90	12.92									

1/ Specific order differentials to be added to this base price can be found by going to:
www.ams.usda.gov/DairyMarketingStatistics; then select “Prices”; and then select “Principal Pricing Points.” $ Revised

ORGANIC DAIRY MARKET NEWS

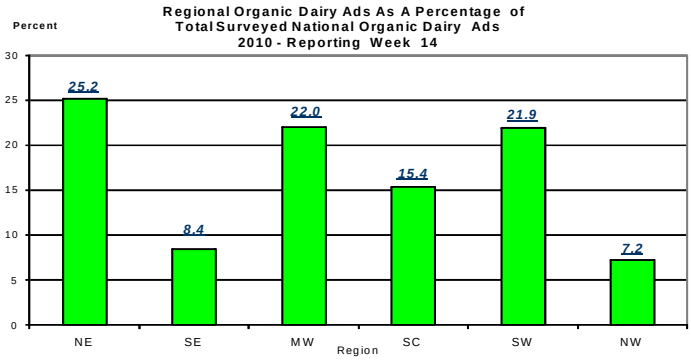
Information gathered March 29 - April 9, 2010

ORGANIC DAIRY RETAIL OVERVIEW

NATIONALLY ADVERTISED PRICE COMPARISON:

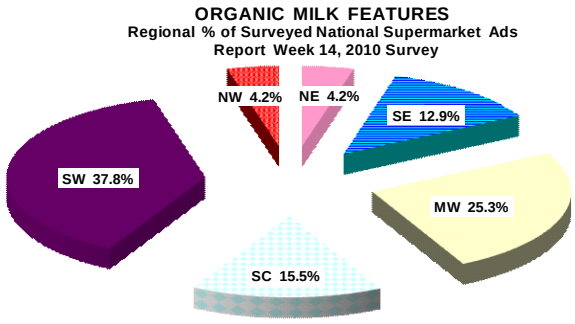
For the period March 27 through April 9, 2010, the number of surveyed newspaper ads containing organic dairy content decreased to the lowest level in 2010, 1,847, 20.2% of 9,124 total ads surveyed. This continues the decline noted 2 weeks ago when 2,125 ads appeared, at that time a record for the least organic dairy ads of 2010. Non-organic milk and/or dairy products continue to appear in nearly 100% of surveyed ads.

The Northeast region topped all regions with 25.2% of total organic dairy ads placed, followed closely by the Midwest, 22.0% and the Southwest, 21.9%. The organic dairy ad percentage for other regions is: South Central Region, 15.4%; Southeast, 8.4%; and Northwest, 7.2%.

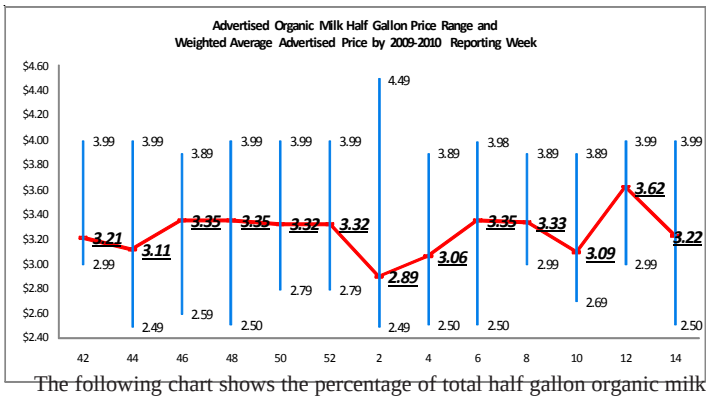


Product Emphasis. Organic milk topped the count with 2,052 total ad listings, up from 1,867 two weeks ago. This included 1,139 for half gallons, 285 for gallons, 314 for 3 quart containers, and 314 for 8 ounce containers. Organic yogurt was second, with 915 total ad listings. The listings included 757 for 6 ounce containers, 49 for 32 ounce containers, 42 for 5.3 ounce containers and 67 for yogurt smoothies. Remaining ad listings were for: butter, 318; and half and half, 338.

Organic milk ads appeared in each region. Of total milk ads, the greatest concentration continued to be the Southwest, 37.8%, followed by the Midwest with 25.3%. The other regions are: South Central, 15.5%; Southeast, 12.9%; Northeast, 4.2%; and Northwest, 4.2%.



Half Gallons. The number of ads for organic half gallons, 1,139, remained the single most advertised organic dairy product. This is an increase from 987 two weeks ago but still a decline from 2,260 ads four weeks ago. The weighted average advertised price for half gallons of organic milk decreased to $3.22, 40 cents lower than two weeks ago. The top of the range remained unchanged at $3.99 while the bottom fell 49 cents to $2.50. Increased concentration of offerings of milk toward the lower end of the price range drove the lower weighted average advertised price.

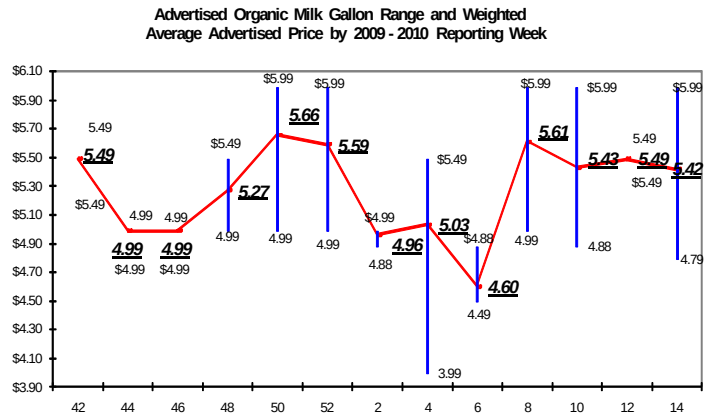


The following chart shows the percentage of total half gallon organic milk ads by region and the regional weighted average advertised price.

REGIONAL ORGANIC HALF GALLON MILK ADS AVERAGE ADVERTISED RETAIL PRICE AND % - WEEK 14

Region	Price	Percentage
Northeast	$3.50	2.8%
Southeast	$2.55	13.9%
Midwest	$2.99	34.1%
South Central	$3.89	2.2%
Southwest	$3.59	36.1%
Northwest	$2.79	10.9%

Gallons. The weighted average advertised price for organic milk gallons fell 7 cents to $5.42. Unlike two weeks ago when there was no range, this week the range was the second greatest since this Report began last Fall. The top is $5.99 and the bottom is $4.79. Ad numbers for organic gallons fell to 285 from 486 from two weeks ago.



A processor commented that the lower number of ads for gallons than half gallons reflects the fact that gallon sales lag half gallon sales. Moreover, gallons sell even less well in some regions than others, as is often reflected by advertising concentration.

The following chart shows the percentage of total organic gallon organic milk ads by region and the regional weighted average advertised price.

REGIONAL ORGANIC GALLON MILK ADS AVERAGE ADVERTISED RETAIL PRICE AND % - WEEK 14

Region	Price	Percentage
Northeast	——	0%
Southeast	$5.99	18.9%
Midwest	$4.79	33.7%
South Central	$4.79	47.4%
Southwest	——	0%
Northwest	——	0%

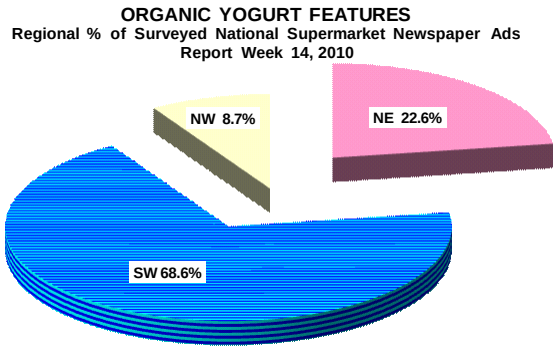
CONTINUED ON PAGE 8-A

ORGANIC DAIRY MARKET NEWS

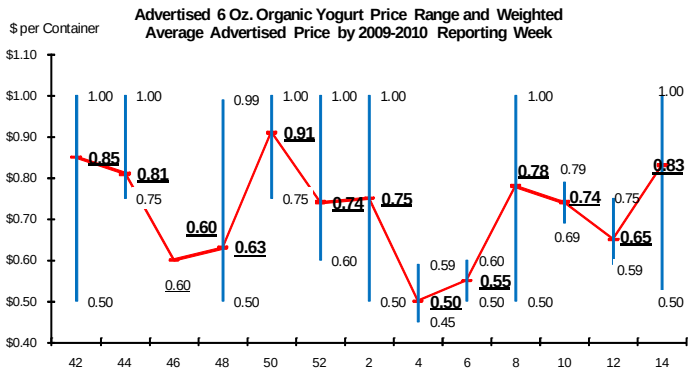
Information gathered March 29 - April 9, 2010

CONTINUED FROM PAGE 8

Yogurt. The shifting regional yogurt ad emphasis decisively moved the Northeast out of first place and replaced it with the Southwest which had 68.6% of yogurt ad placements. The Northeast fell to 22.6% of placements in contrast with 68.6% two weeks ago. The only other region with organic yogurt ads, the Northwest, had 8.7% of placements.



Yogurt prices are up. The weighted average advertised price of 6 ounce yogurt, 83 cents, is among the higher weighted average advertised organic yogurt prices since this Report began. It is a price higher than the top of the range two weeks ago. The range is 50 cents; with a top of range price of $1.00, 25 cents above two weeks ago and a bottom range price of 50 cents, 9 cents below two weeks ago.



Butter. Organic butter in 1 pound boxes was advertised between $3.99 and $4.99, with a weighted average advertised price of $4.47. All 260 ads were in the South Central Region. There were also 58 ads for whipped organic butter in 8 ounce containers for $1.99, all in the Northeast.

Half and Half. Half and half was advertised in 338 Northeastern ads at $1.69 a quart.

No other organic dairy products were advertised during this two week period.

SUPERMARKET PRICE COMPARISON:

Madison Prices. Non-advertised organic milk sold in a range of food stores in Madison, Wisconsin is compared for the period March 27 through April 9, 2010. Prices are compared for organic milk in both 1 gallon and 1/2 gallon sizes of whole milk; reduced fat (2%); lowfat (1%); nonfat (skim); and 1/2 gallons of chocolate milk.

Beginning with this report, a selection of organic cheese varieties with the most shelf placements is also compared. Varieties include 8 ounce chunks of Mozzarella, Mild Cheddar, Monterey Jack, and Pepper Jack; as well as 6 ounce string cheese including Colby Jack and Mozzarella.

As in past weeks, stores include a big-box sized local supermarket; 2 regional chain supermarkets; a smaller but full product line food market; and 2 natural food stores; a national discount chain store also selling food; and a large local cooperative grocery store. Milk available at the range of stores includes 2 national brands, 4 private label store brands, and 3 small local or near-by creamery brands. Cheese available included 2 national brands, 2 store brands, and cheese from 5 other cheesemakers.

Both the highest and lowest milk prices were for national brands of organic milk. The highest prices for gallons and the lowest prices for half gallons were found at a cooperative supermarket. The highest price for half gallons was found at a regional grocery chain store and the lowest at a big box local supermarket. The price spread was narrowly highest for half gallons of reduced fat (2%) milk and 1 cent apart for all other half gallons and gallons except chocolate, which had a 46 cent range.

As for cheese, the same national brand accounted for the highest and lowest prices in each variety and category. All lowest prices were found at the local big-box supermarket. Most of the highest prices were found at a natural foods store except in one case, at a local cooperative supermarket.

ORGANIC MILK AND CHEESE PRICE RANGE
MADISON, WISCONSIN - WEEK 14

	LOW	HIGH	RANGE
	(In Dollars)		
GALLONS:			
Whole	5.39	6.75	1.36
Reduced Fat (2%)	5.39	6.75	1.36
Low Fat (1%)	5.39	6.75	1.36
Nonfat (Skim)	5.39	6.75	1.36
HALF GALLONS:			
Whole	3.04	4.39	1.35
Reduced Fat (2%)	2.74	4.39	1.65
Low Fat (1%)	3.04	4.39	1.35
Nonfat (Skim)	3.04	4.39	1.35
CHOCOLATE HALF GALLON:			
	3.99	4.45	0.46
CHEESE – 8 OUNCE CHUNKS:			
Mozzarella	3.89	5.75	1.86
Mild Cheddar	3.79	4.99	1.20
Monterey Jack	3.79	5.69	1.90
Pepper Jack	3.89	5.69	1.80
CHEESE – 6 OUNCE STRING			
Mozzarella	3.89	5.09	1.20
Colby Jack	3.89	5.39	1.50

SPECIAL NOTE: ORGANIC CHEESE AND MILK EXPORTS:

Information concerning organic dairy exports is difficult to locate and verify. However, DMN has verified that a national brand of organic cheese is now available in restaurants of a U.S. hotel chain in the Southern Caribbean. Organic milk bottled in the U.S. is also available. This occurred because hotel guests requested the cheese and milk, which the hotel chain now routinely has shipped from Miami on refrigerated ships so as to meet customer demand.

ORGANIC DAIRY FLUID OVERVIEW

The Spring flush has increased milk production in some areas, particularly in the East, Midwest and California. Many organic dairy farmers are eager to have cows increase grazing and thereby reduce the need for buying feed. In contrast with weak sales of fluid non-organic milk in some regions in recent weeks, organic milk sales were described as "great" by a processor.

Organic milk and dairy product sales are even stronger than expected, that decisions made in February to divert some organic milk for non-organic use over coming months has now been reversed. Some processors report "record sales" over some of the last eight weeks. Other processors have projected sales increases during 2010 in the range of 5% of existing business. The length of the run of recently increased organic milk sales has led to cautious optimism that the sales strength transcends filling the pipeline and reflects strengthened demand. This strength in organic milk and dairy product sales occurs contemporaneously with the previously noted decline in organic dairy content of supermarket ads.

Nevertheless, the organic milk supply is not uniformly balanced to meet demand throughout the country. Areas of the West continue to have greater supply than desired.

CONTINUED ON PAGE 8-B

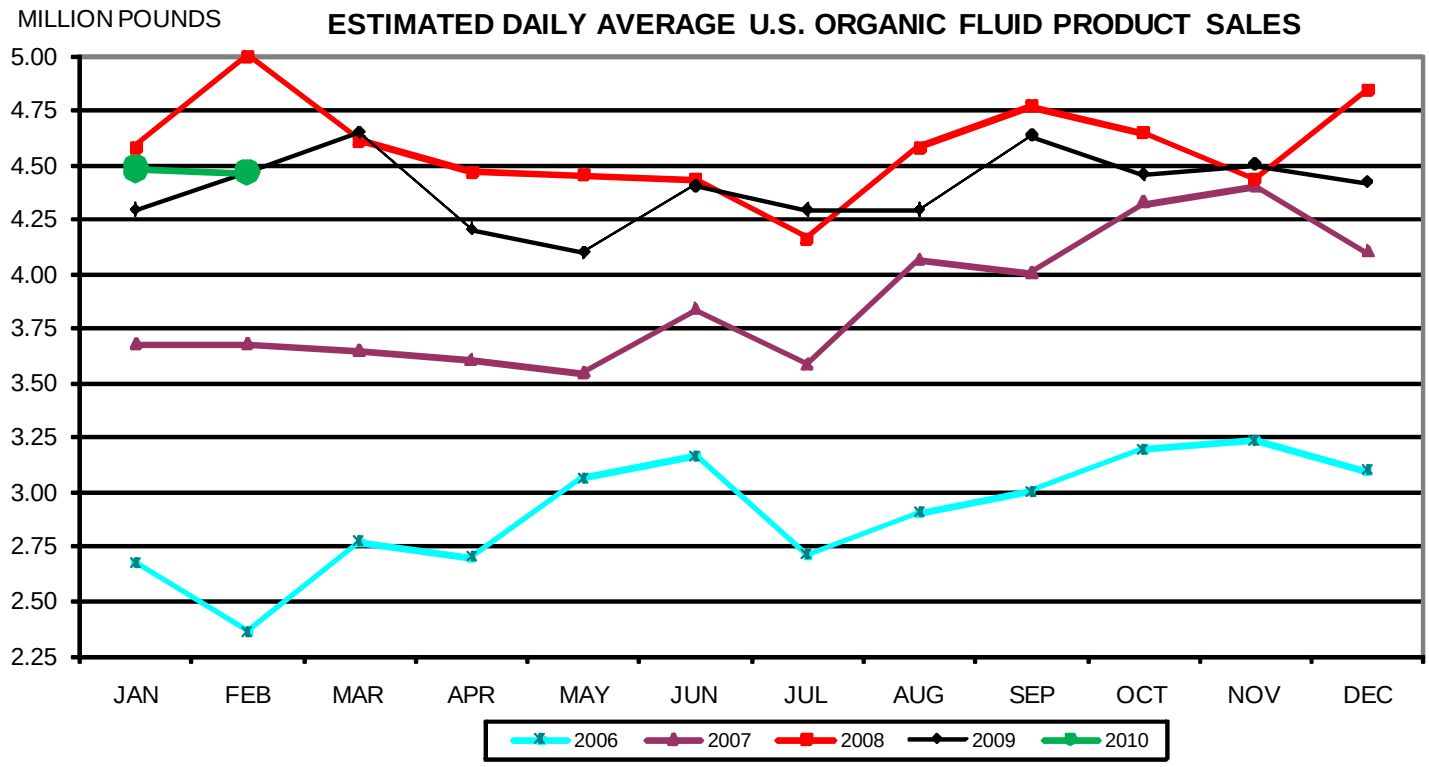
ORGANIC DAIRY MARKET NEWS

Information gathered March 29 - April 9, 2010

CONTINUED FROM PAGE 8-A

AMS reports that During February, about 29 million pounds of packaged organic whole milk and 96 million pounds of organic fat reduced milk is estimated to have been sold in the United States. This was 1.5% more organic whole milk and 0.2% less organic fat reduced milk than was sold in February, 2009. Year to date sales of organic whole milk during 2010 through February total 62 million pounds, 3.8% more than the same period in 2009 and of organic fat reduced milk, 202 million pounds, 1.7% more than the same period in 2009. Total organic milk products sold during February lead February 2009 by 0.2% and through February this year, led the same period in 2009 by 2.2%. This increase in organic milk sales is in contrast to total fluid milk products, which for February was -0.1% below February last year and through February 2010, -1.2% below the same period in 2009.

According to USDA Livestock and Grain Market news, compared with two weeks ago, national organic grain and feedstuff prices were lower. Demand was light and offerings were heavy for feed grade corn, soybeans, and wheat. In the Eastern Cornbelt, with the exception of soybeans, organic grain and feedstuffs traded lower. Upper Midwest organic grain and feedstuff prices were lower than two weeks ago, with low demand and heavy offerings on feed grade corn, soybeans and wheat. Additional information is available at: www.ams.usda.gov/LSMarketNews.



APRIL MILK SUPPLY AND DEMAND ESTIMATES*

The milk production forecast is raised for 2010 as the pace of herd reduction is reduced from last month. Dairy exports on a skim-solids basis are lowered due to weaker-than-expected sales early in the year. Both fat and skim-solids basis imports are reduced from last month due to weaker-than-expected imports of cheese. Fat and skim stocks are forecast higher for 2010 as cheese stocks have not declined as expected. Product price forecasts are generally lowered from last month as milk production is forecast higher and demand is weaker than expected. The cheese price is reduced as stocks remain high. The butter price forecast is about unchanged from last month as stronger prices in the first half of the year may largely be offset by lower second-half prices as butter production increases. The nonfat dry milk (NDM) price is forecast lower as export demand lags. The whey price is lowered slightly. The Class III price is reduced due to lower cheese and whey prices while the lower price forecast for NDM results in a reduced Class IV price. The all milk price for 2010 is forecast at $15.45 to $15.95 per cwt.

U.S. MILK SUPPLY AND USE

Commodity	2008	2009 Estimated		2010 Projected	
		March	April	March	April
			BILLION POUNDS		
MILK					
PRODUCTION	190.0	189.3	189.3	189.5	189.9
FARM USE	1.1	1.1	1.1	1.1	1.1
FAT BASIS SUPPLY					
BEGINNING COMMERCIAL STOCKS	10.4	10.1	10.1	11.3	11.3
MARKETINGS	188.9	188.3	188.3	188.4	188.8
IMPORTS	3.9	4.1	4.1	4.1	3.8
TOTAL COMMERCIAL SUPPLY	203.2	202.4	202.4	203.9	203.9
FAT BASIS USE					
COMMERCIAL EXPORTS	8.7	4.2	4.2	4.7	4.8
ENDING COMMERCIAL STOCKS	10.1	11.3	11.3	10.0	10.4
CCC NET REMOVALS 1/	0.0	0.6	0.6	0.3	0.3
COMMERCIAL USE 2/	184.3	186.0	186.0	188.7	188.4
SKIM-SOLIDS BASIS SUPPLY					
BEGINNING COMMERCIAL STOCKS	10.0	10.9	10.9	11.3	11.3
MARKETINGS	188.9	188.3	188.3	188.4	188.8
IMPORTS	3.7	3.7	3.7	3.9	3.4
TOTAL COMMERCIAL SUPPLY	202.6	202.8	202.8	203.6	203.5
SKIM-SOLIDS BASIS USE					
COMMERCIAL EXPORTS	26.6	22.5	22.5	25.5	25.4
ENDING COMMERCIAL STOCKS	10.9	11.3	11.3	10.5	10.8
CCC NET REMOVALS 1/	1.3	2.9	2.9	0.0	0.0
COMMERCIAL USE 2/	163.7	166.8	166.8	168.0	167.6
			MILLION POUNDS		
CCC PRODUCT NET REMOVALS 1/					
BUTTER	0	25	25	15	15
CHEESE	0	1	1	2	2
NONFAT DRY MILK	111	246	246	2	2
DRY WHOLE MILK	0	0	0	0	0

NOTE: Totals may not add due to rounding. 1/ Includes products exported under the Dairy Export Incentive Program.
2/ Includes commercial exports.

Continued on page 10

APRIL MILK SUPPLY AND DEMAND ESTIMATES-cont'd

U.S. DAIRY PRICES					
Commodity	2008	2009 Estimated		2010 Projected	
		March	April	March	April
			DOLLARS PER POUND		
PRODUCT PRICES 1/					
CHEESE	1.8954	1.2966	1.2966	1.500-1.560	1.490-1.540
BUTTER	1.4356	1.2096	1.2096	1.415-1.505	1.420-1.500
NONFAT DRY MILK	1.2256	0.9223	0.9223	1.135-1.185	1.110-1.150
DRY WHEY	0.2504	0.2585	0.2585	0.380-0.410	0.375-0.405
			DOLLARS PER CWT		
MILK PRICES 2/					
CLASS III	17.44	11.36	11.36	14.20-14.80	14.10-14.60
CLASS IV	14.65	10.89	10.89	13.65-14.35	13.40-14.00
ALL MILK 3/	18.29	12.81	12.81	15.55-16.15	15.45-15.95
	QUARTERLY				
	2009 IV	2010 I 4/	2010 II 4/	2010 III 4/	2010 IV 4/
			BILLION POUNDS		
MILK PRODUCTION	46.3	47.2	48.9	47.0	46.7
			DOLLARS PER CWT.		
ALL MILK PRICE 2/ 3/	15.33	15.70	14.65-15.05	15.25-15.95	16.15-17.15
CLASS III PRICE 2/	13.99	13.86	13.50-13.90	14.25-14.95	14.65-15.65
CLASS IV PRICE 2/	13.37	13.23	13.30-13.80	13.70-14.50	13.50-14.60

1/ Simple average of monthly prices calculated by AMS from NASS weekly average dairy product prices for class price computations. Details may be found by going to http://www.ams.usda.gov/DairyMarketStatistics; then select "Prices;" then select "Description." 2/ Annual and quarterly Class III and Class IV prices are the simple average of monthly minimum Federal order milk prices paid by regulated plants for milk used in the respective classes. All milk price is the simple average of monthly prices received by farmers for milk at average test. 3/ Does not reflect any deductions from producers as authorized by legislation. 4/ Projection.

* The World Agricultural Supply and Demand Estimates were approved by the Interagency Commodity Estimates Committee. The members for Dairy are: Shayle Shagam, Chairperson, WAOB; Jerry Cessna, AMS; Paul Kiendl, FAS; Roger Hoskin, ERS; and Milton Madison, FSA.

SOURCE: "World Agricultural Supply and Demand Estimates," WASDE-481, World Agricultural Outlook Board, USDA, April 9, 2010.

FEBRUARY FLUID MILK SALES

During February, about 4.4 billion pounds of packaged fluid milk products is estimated to have been sold in the United States. This was 0.1 percent lower than February 2009. After adjusting for calendar composition, sales in February 2010 were 0.1 percent lower than February 2009. On an individual product basis, after adjusting for calendar composition, sales of organic whole milk, reduced fat milk (2%), low fat milk (1%) and fat-free (skim) milk increased from February 2009, while sales of whole milk, flavored whole milk, flavored fat-reduced milk, organic fat-reduced milk, and buttermilk decreased from a year earlier.

Editor's Note: Additional data can be found at http://www.ams.usda.gov/AMSv1.0/FluidMilkSalesDataMonthlyandYeartoDate.

ESTIMATED TOTAL U.S. SALES OF FLUID MILK PRODUCTS, FEBRUARY 2010, WITH COMPARISONS 1/

Product Name	Sales		Change from: 2/	
	February	Year to Date	Previous Year	Year to Date
	Mil. Lbs.		Percent	
Whole Milk	1,125	2,360	-3.3	-4.8
Flavored Whole Milk	43	86	-8.0	-6.7
Organic Whole Milk	29	62	1.5	3.8
Reduced Fat Milk (2%)	1,476	3,112	2.6	1.4
Low Fat Milk (1%)	564	1,184	4.5	8.5
Fat-Free Milk (Skim)	647	1,348	0.8	-0.8
Flavored Fat-Reduced Milk	344	705	-1.7	-0.5
Organic Fat-Reduced Milk	96	202	-0.2	1.7
Buttermilk	37	76	-33.5	-41.3
Total Organic Milk Products	125	263	0.2	2.2
Total Fluid Milk Products 3/	4,367	9,148	-0.1	-1.2
Total Fluid Milk Products Adjusted 3/ 4/	4,367	9,200	-0.1	0.1

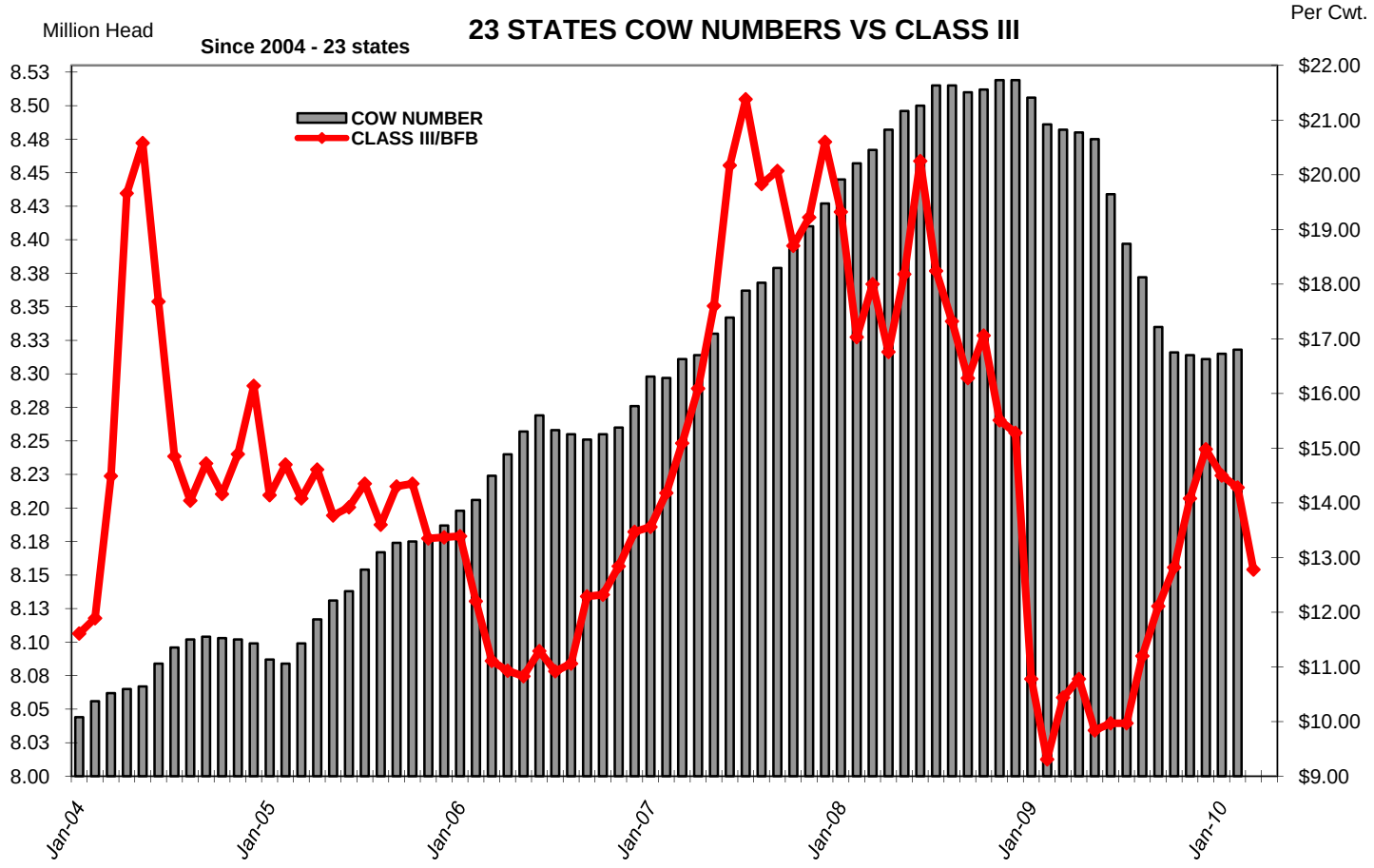
1/ These figures are representative of the consumption of fluid milk products in Federal milk order marketing areas and California, which accounts for approximately 92 percent of total fluid milk sales in the United States. An estimate of total U.S. fluid milk sales is derived by interpolating the remaining 8 percent of sales from the Federal milk order and California data. 2/ Percent changes, as well as sales volumes, unless otherwise noted, are shown on an unadjusted basis; see 4/. 3/ Total fluid milk products include the products listed plus miscellaneous products and eggnog. 4/ Sales volumes and percent changes have been adjusted for calendar composition; see http://www.ams.usda.gov/AMSv1.0/getfile?dDocName=STELDEV3023272

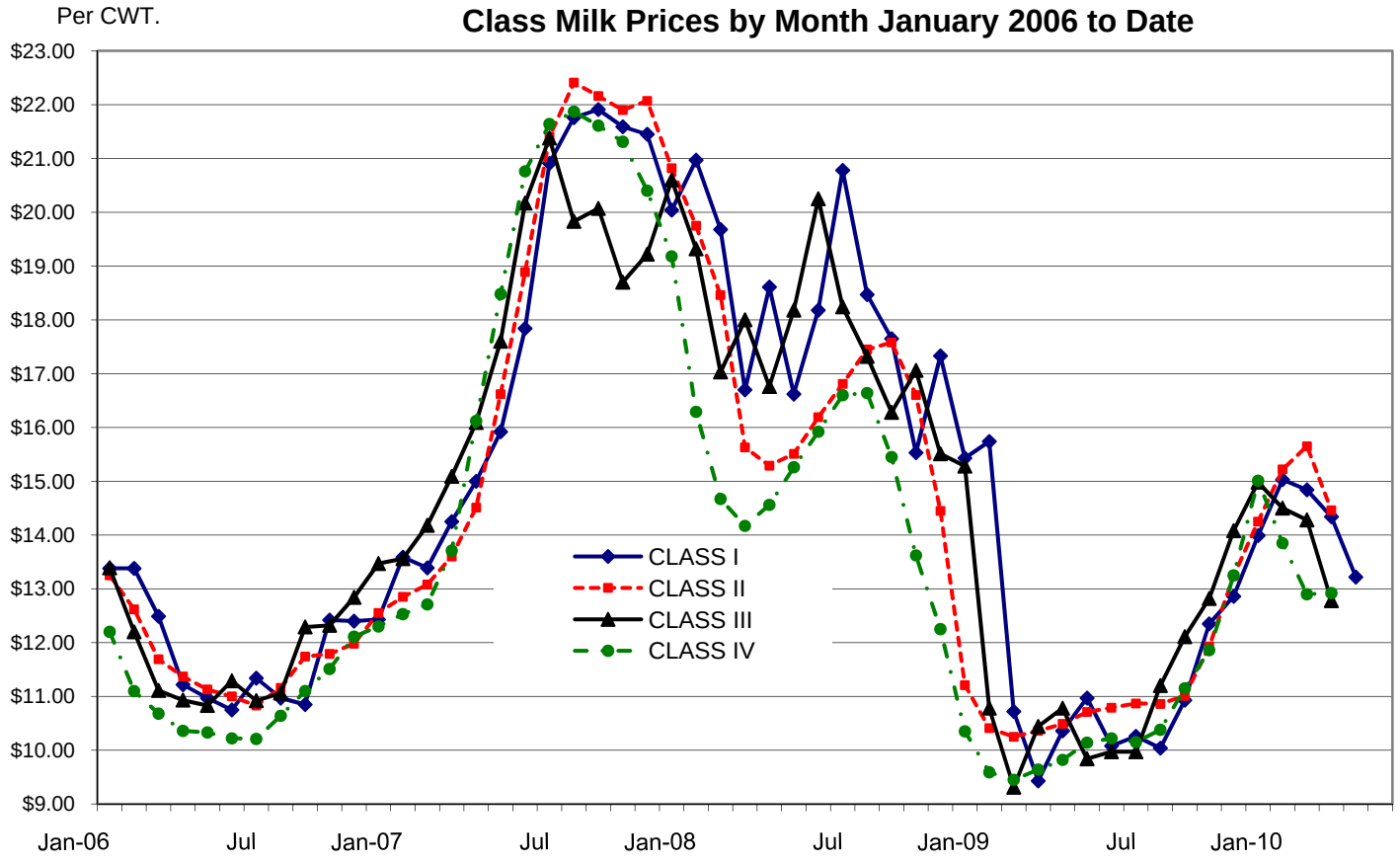
PACKAGED SALES OF TOTAL FLUID MILK PRODUCTS IN FEDERAL MILK ORDERS AND CALIFORNIA, JANUARY 2010, WITH COMPARISONS 1/

Area (Order Number)	Sales		Change from: 2/	
	February	Year to Date	Previous Year	Year to Date
	Mil. Lbs.		Percent	
Northeast (001)	748	1,538	1.5	-1.8
Appalachian (005)	297	630	6.3	5.3
Southeast (007)	402	852	1.1	-0.2
Florida (006)	237	500	-2.6	-0.9
Mideast (033)	496	1,042	2.0	0.9
Upper Midwest (030)	345	720	-1.2	-2.0
Central (032)	363	765	-2.6	-3.4
Southwest (126)	360	755	2.7	1.2
Arizona (131)	94	198	-2.6	-0.5
Pacific Northwest (124)	171	361	-1.1	-0.9
California (---)	505	1,056	-5.6	-6.1

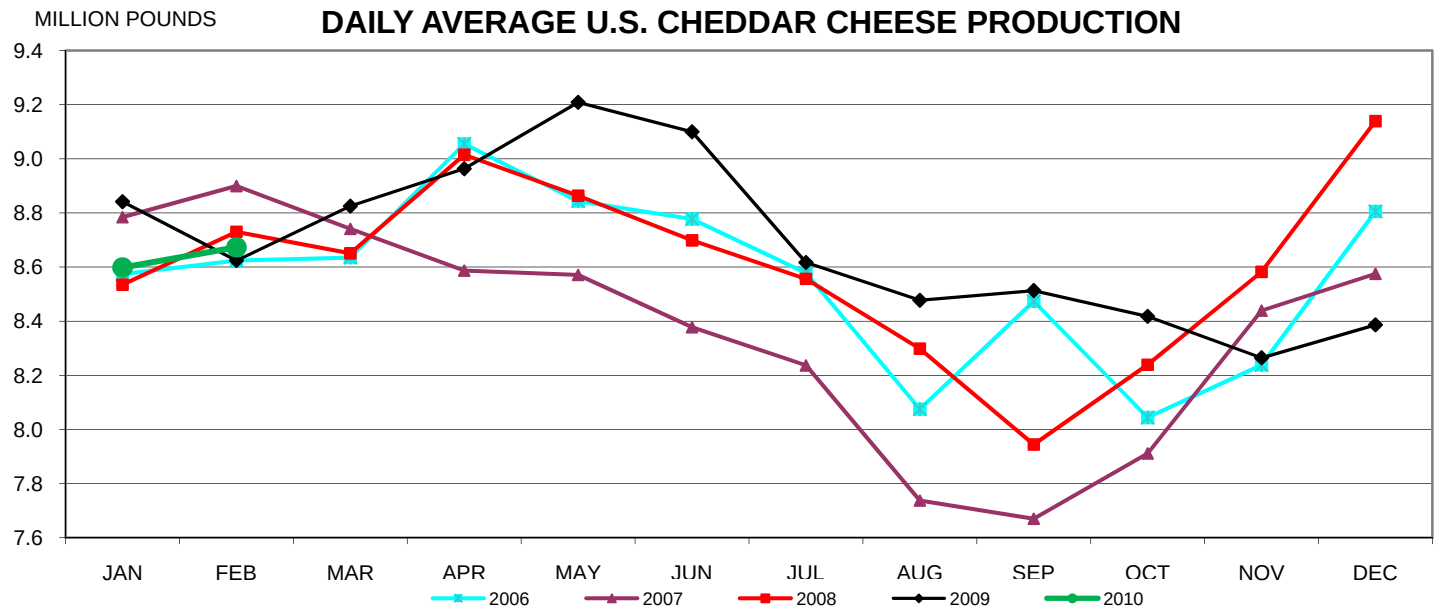
1/ These figures are representative of the consumption of total fluid milk products in the respective area; see 3/ above for the products included. 2/ Percent changes, as well as sales volumes, are shown on an unadjusted basis; see 2/ above.

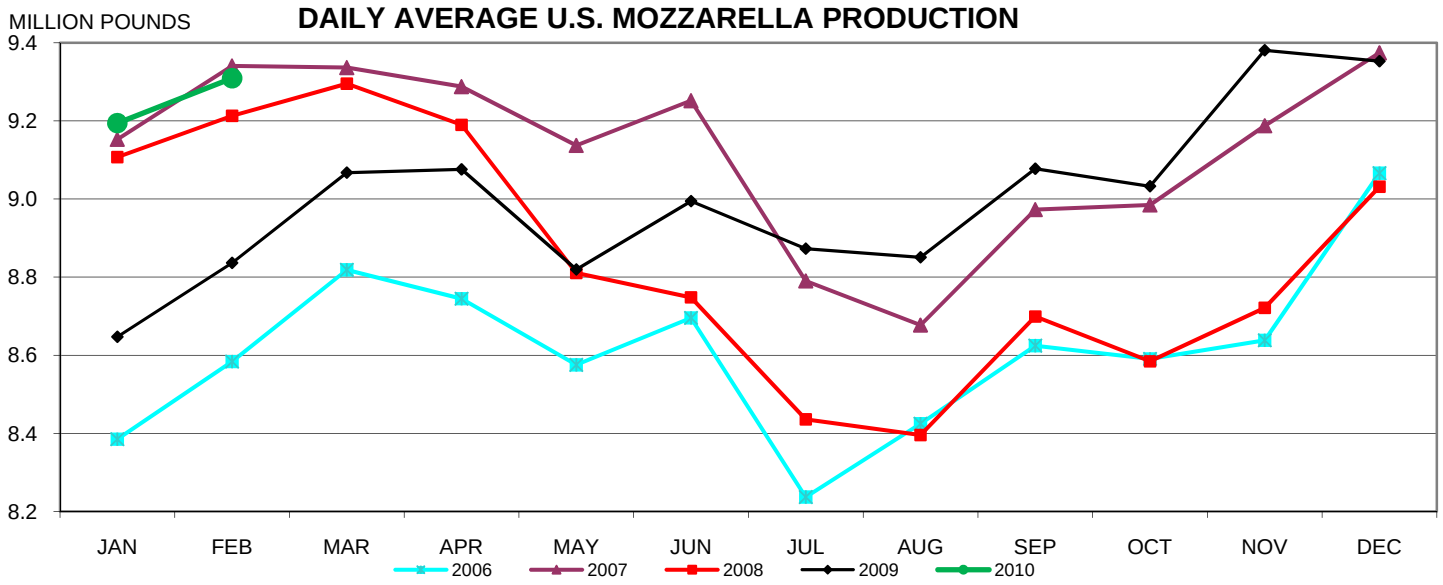
SOURCE: Monthly reports filed by milk processors subject to the provisions of the applicable Federal milk order, AMS, USDA, and *California Dairy Information Bulletin*, California Agricultural Statistics Service and Milk Stabilization Branch.

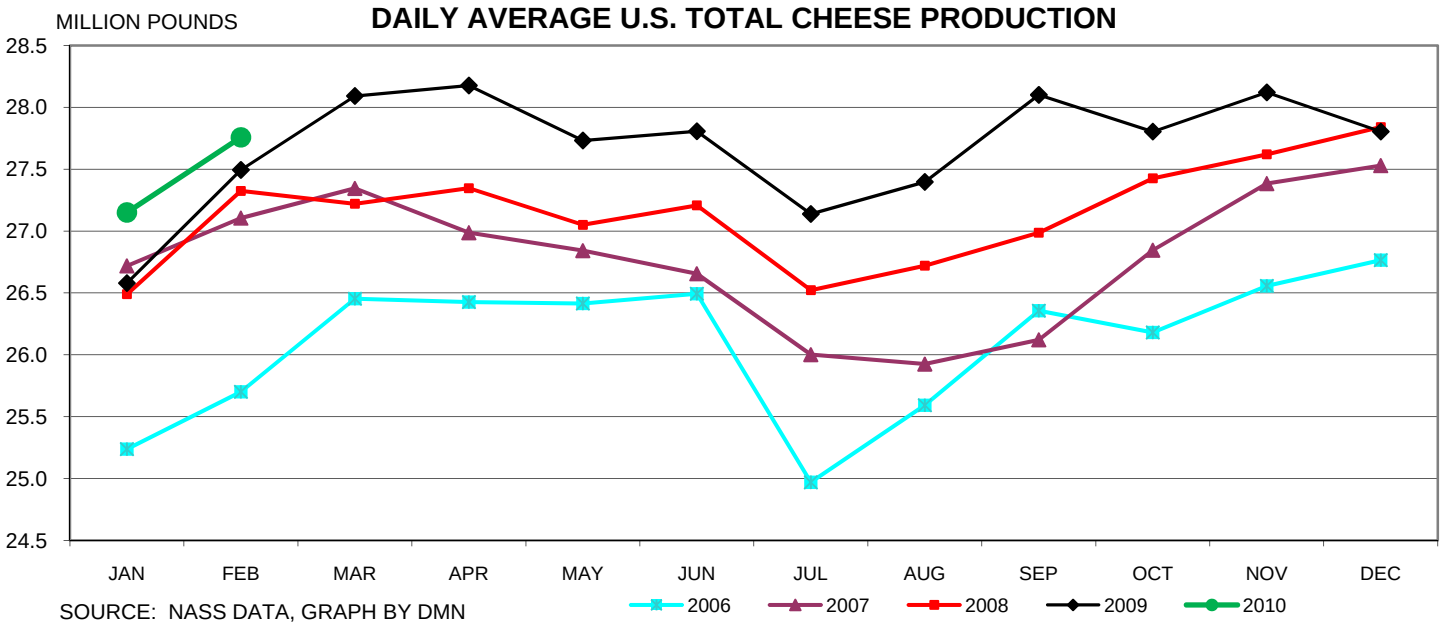




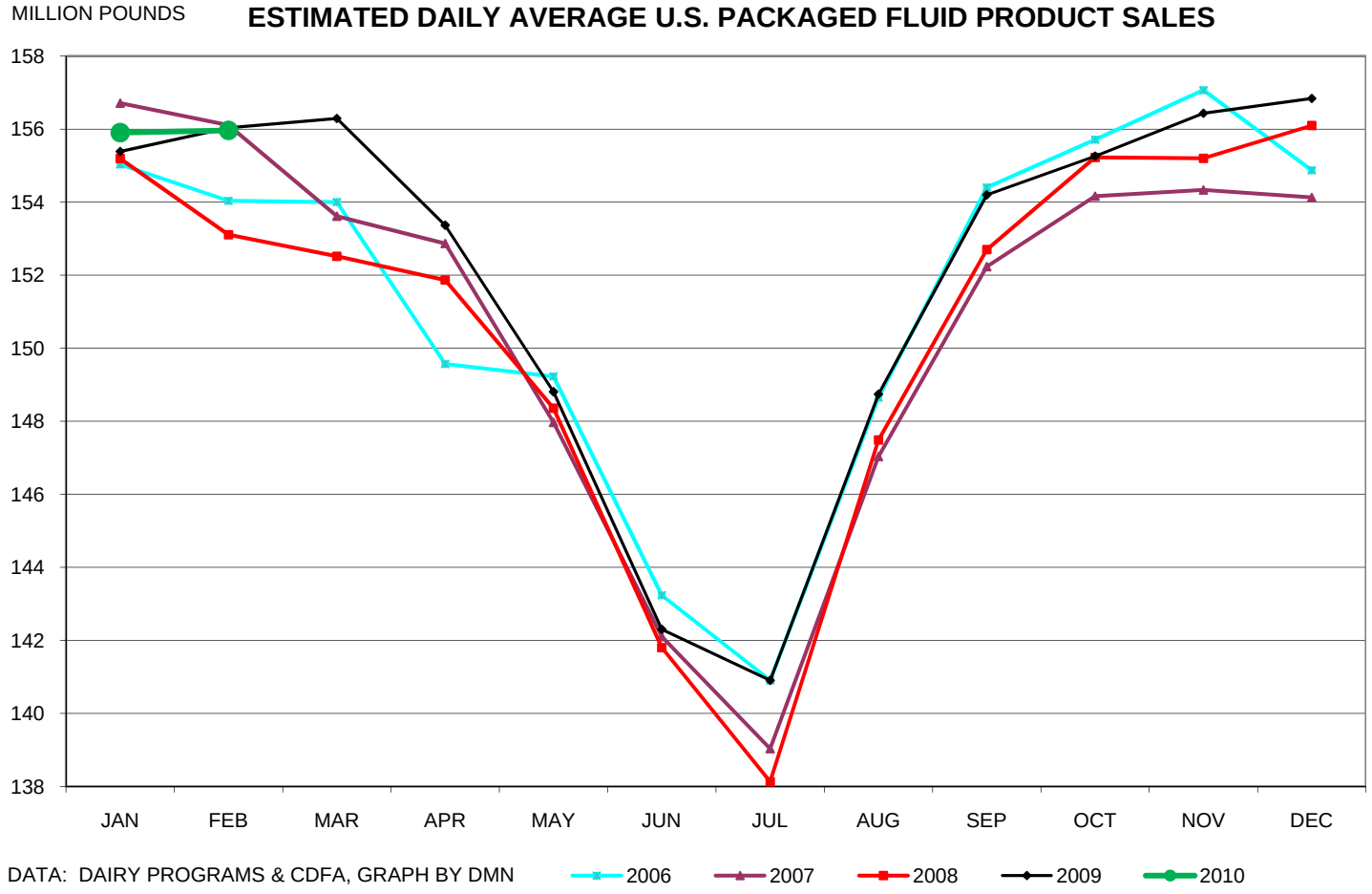
Class I base price does not include applicable Class I differential

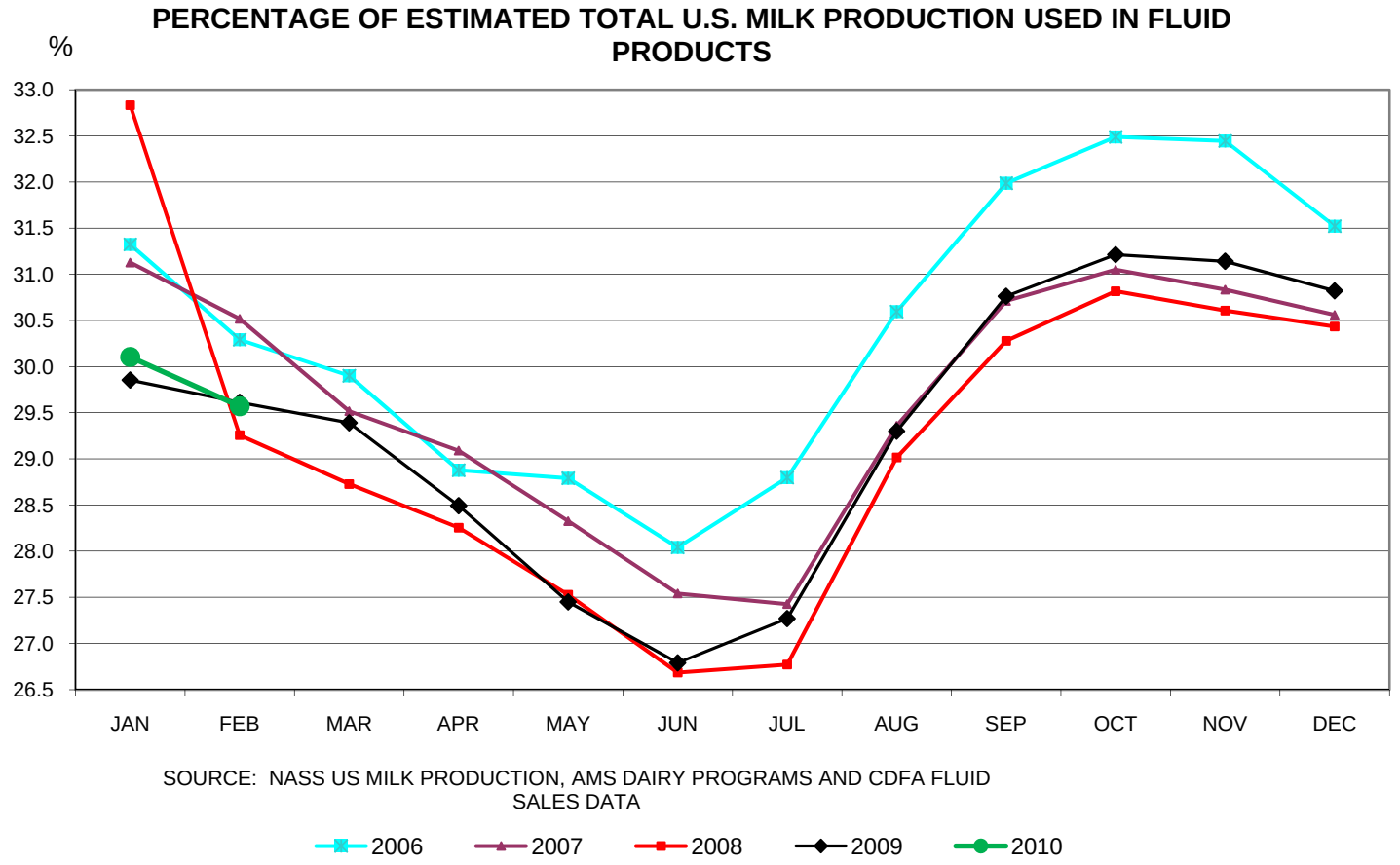






SOURCE: NASS DATA, GRAPH BY DMN


MILLION POUNDS
ESTIMATED DAILY AVERAGE U.S. PACKAGED FLUID PRODUCT SALES
158
156
154
152
150
148
146
144
142
140
138
JAN
FEB
MAR
APR
MAY
JUN
JUL
AUG
SEP
OCT
NOV
DEC
DATA: DAIRY PROGRAMS & CDFA, GRAPH BY DMN
2006
2007
2008
2009
2010


PERCENTAGE OF ESTIMATED TOTAL U.S. MILK PRODUCTION USED IN FLUID PRODUCTS
%
33.0
32.5
32.0
31.5
31.0
30.5
30.0
29.5
29.0
28.5
28.0
27.5
27.0
26.5
JAN
FEB
MAR
APR
MAY
JUN
JUL
AUG
SEP
OCT
NOV
DEC
SOURCE: NASS US MILK PRODUCTION, AMS DAIRY PROGRAMS AND CDFA FLUID SALES DATA
2006
2007
2008
2009
2010

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