The Market Administrator's

BULLETIN

CALIFORNIA MARKETING AREA

Peter Fredericks, Market Administrator

July 2025 Federal Order No. 51

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July Pool Price Calculation

The July 2025 Statistical Uniform Price (SUP) for the California Marketing Area decreased by $0.13 per hundredweight (cwt) from last month to $18.80 per cwt for milk delivered to plants located in Los Angeles County, California, the pricing point for the California Federal Marketing Order. The SUP is announced at 3.5 percent butterfat, 2.99 percent protein, and 5.69 percent other solids. When reported at the average tests of pooled milk (4.11 percent butterfat, 3.32 percent protein, and 5.78 percent other solids), the July SUP was $21.16 per cwt, $0.31 lower than June. The July Producer Price Differential (PPD) in Los Angeles County was $1.48 per cwt, $1.37 higher than the month prior.

Product Prices Effect

Most product prices in the National Dairy Product Sales Report increased into July with the butter price increasing by the largest margin of 9 cents to $2.5753 per pound. The nonfat dry milk and dry whey prices similarly increased by 3 and 2 cents to $1.2783 and $0.5670 per pound, respectively. The cheese price was the only price to decrease in July, dropping by 17 cents to $1.7634 per pound.

Component prices experienced mostly upward movement in the month of July. The butterfat price increased by the largest margin of roughly 11 cents to $2.8435 per pound. The other solids and nonfat solids price both increased slightly by 2 cents each to $0.3092 and $1.0286 per pound, respectively. The protein price experienced the only decline of the month decreasing 66 cents to $1.8730 per pound.

Similarly to the product and component prices, three of the four Class prices increased compared to last month. The Class I price increased by the largest margin, rising $1.56 to $21.62 per cwt. The Class II price rose by 88 cents to $19.31 per wt. The Class III price had the largest decrease of $1.50 to $17.32 per cwt. Lastly, the Class IV price increased by 59 cents to $18.89 per cwt.

Selected Statistics

The July 2025 protein price of $1.8730 per cwt, dropped to its lowest level since 2024. For a second year in a row, Class I utilization in July has increased year-over-year on a daily average basis by 0.72 percent. The July 2025 Class II utilization was 117.2 million pounds, a volume not experienced in July since 2020.❖

Pool Summary

- A total of 835 producers were pooled with an average daily delivery per producer of 73,161 pounds, a decrease of 21.81 percent from June.
- Pooled milk receipts totaled 1.9 billion pounds, a decrease of 20.58 percent on an average daily basis.
- Class I usage (milk for bottling) accounted for 19.4 percent of total pooled milk receipts.
- The average butterfat test of producer receipts was 4.11 percent.
- The average true protein test of producer receipts was 3.31 percent.
- The average other solids test of producer receipts was 5.78 percent.❖

Class Utilization

Pooled Milk	Percent	Pounds
Class I	19.4	368,142,134
Class II	6.2	117,239,120
Class III	66.1	1,251,527,582
Class IV	8.3	156,868,110
Total Pooled Milk		1,893,776,946

Producer Component Prices

	2025	2024
	$/lb	
Protein Price	1.8730	3.5720
Butterfat Price	2.8435	1.9466
Other Solids Price	0.3092	0.2571

Class Price Factors

	2025	2024
	$/cwt	
Class I	21.62	23.21
Class I ESL Adj	1.14	N/A
Class II	19.31	21.82
Class III	17.32	19.79
Class IV	18.89	21.31

Milk Marketings by County December 2024

Every May and December, the Central Milk Market Administrator, Federal Order (FO) 32, publishes maps of total milk marketings collected by FO offices. FO marketings included in these maps represent approximately 86 percent of the total pounds of milk produced in the U.S. in December 2024. This map and others pertaining to December 2024 milk marketings can be found in the FO 32 June 2025 *Bulletin* and the 2019 maps can be found in the June 2020 *Bulletin*. To access those bulletins visit www.fmmacentral.com/monthly_news_letter.html.

In December 2024, 1,280 counties marketed 100 percent of all FO milk in the U.S., as shown in the map below. FO marketings in December 2024 totaled approximately 16.1 billion pounds of milk, roughly 2.9 percent lower than the 16.6 billion pounds reported in December 2019. Milk marketings remained highly concentrated, with 55 counties accounting for 50 percent of the December 2024 FO total, compared to 58 counties in December 2019. The 55 counties that marketed half of the FO total in December 2024 represented 4.3 percent of the 1,280 counties with milk marketings.

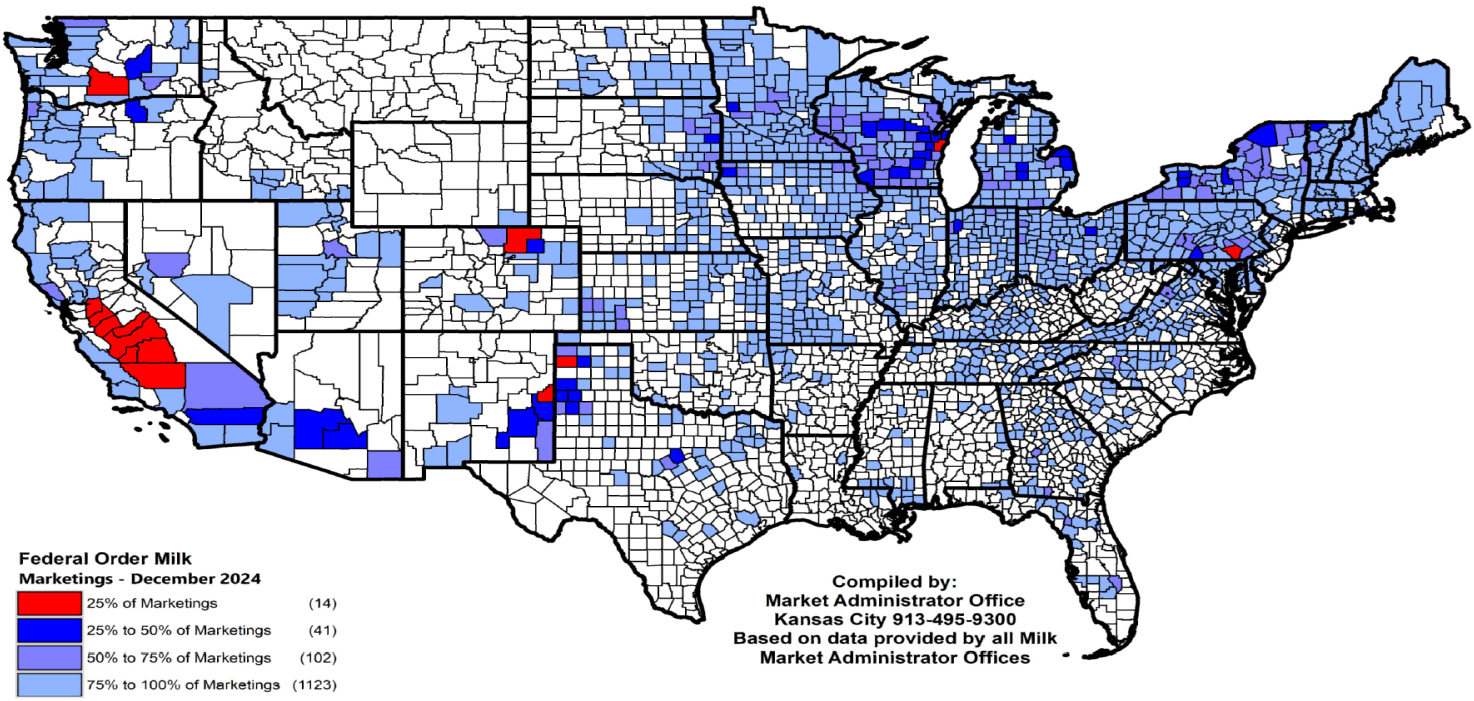
Marketings from 468 counties increased between December 2019 and December 2024. Roughly 8.5 billion pounds of milk were marketed from these counties in December 2024, representing about 53 percent of the national total. Thirty-eight of the counties with increased marketings recorded gains of more than 10 million pounds. 812 counties representing 7.64 billion pounds of milk, showed declines in FO milk marketings during this same period.

Top 14 Counties

Of those 1,280 counties, 14 accounted for 25 percent of national marketings for the month, the same as in December 2019. In terms of volume, these counties marketed 4.07 billion pounds of milk, about 153 million pounds less than in December 2019. Eight of the top 14 countie are from California. These eight counties marketed 2.9 billion pounds in December 2024, or 18 percent of all FO marketings. This compares to roughly 2.96 billion pounds, or 17.86 percent of the FO total, in December 2019.

Table 1 analyzes the 14 counties that marketed 25 percent of the FO total in both December 2019 and December 2024 as shown on the map on page 2. Merced County experienced the largest growth in milk marketings, increasing by 24.1 percent from December 2019 to December 2024. Merced County's marketings increased from 419.3 million to 520.6 million pounds. Additionally, Merced County's December 2024 contribution to the FO total was 3.23 percent, compared to 2.53 percent in 2019. Tulare County's milk marketings totaled 870.9 million

1,280 Counties Marketed 100% of All Federal Order Milk During December 2024



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Milk Marketings by County December 2024 *(continued from page 2)*

14 Counties Marketed 25% of All Federal Order Milk During December 2024

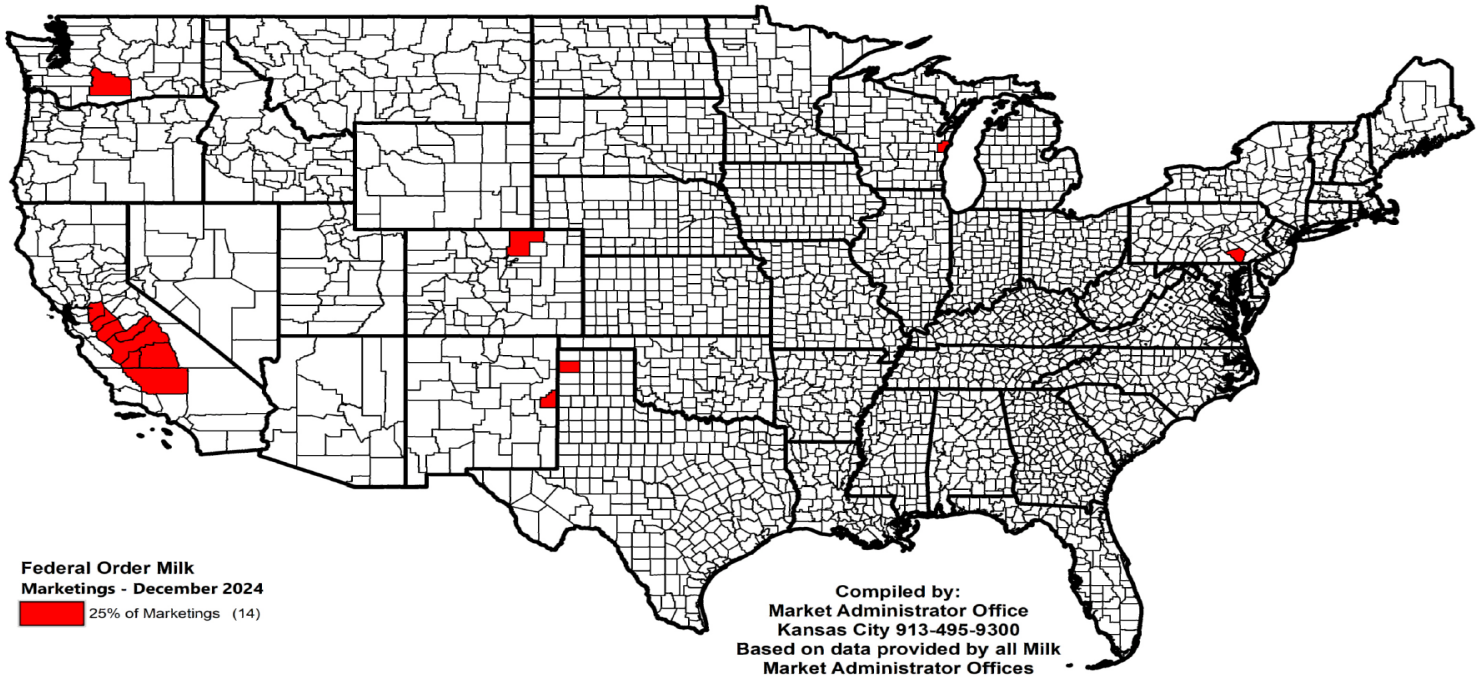

Table 1: Fourteen Counties Marketed 25% of the Federal Order Milk during December 2019 and 2024

County	Dec 2024 Marketings	Dec 2024 % of FO Total	Dec 2019 Marketings	Dec 2019 % of FO Total	Percent Change in Marketings
	Lbs	%	Lbs	%	%
Tulare, CA	870,887,984	5.40	881,552,788	5.31	-1.21
Merced, CA	520,596,989	3.23	419,362,556	2.53	24.14
Kings, CA	356,011,639	2.21	390,979,952	2.35	-8.94
Kern, CA	325,454,099	2.02	343,846,745	2.07	-5.35
Stanislaus, CA	286,330,465	1.78	316,865,626	1.91	-9.64
Weld, CO	288,076,623	1.79	256,786,530	1.55	12.19
Fresno, CA	215,488,252	1.34	248,315,097	1.50	-13.22
Yakima, WA	210,213,640	1.30	225,755,132	1.36	-6.88
Maricopa, AZ*	-	-	221,889,167	1.34	-
Hartley, TX	181,463,752	1.13	193,563,650	1.17	-6.25
San Joaquin, CA	166,232,378	1.03	193,538,050	1.17	-14.11
Lancaster, PA	187,234,989	1.16	192,590,240	1.16	-2.78
Madera, CA	154,900,490	0.96	169,773,966	1.02	-8.76
Curry, NM	163,549,870	1.01	168,565,460	1.02	-2.98
Manitowoc, WI**	143,975,414	0.89	-	-	-
14 County Total	**4,070,416,584**	**25.25**	**4,223,384,959**	**25.46**	
FO Total	**16,129,790,834**		**16,606,428,113**		

*Did not make it onto the top 14 list in December 2024

**Did not make it onto the top 14 list in December 2019

pounds in December 2024, down slightly from 881.5 million pounds in December 2019. However, Tulare's share of the FO total increased to 5.4 percent in December 2024, up from 5.31 percent in 2019. Despite this decrease in volume, Tulare County remains the largest milk-marketing county in the U.S., with production levels significantly higher than any other county. San Joaquin and Fresno Counties observed the largest declines in milk marketings from December 2019 to December 2024, at 13.2 percent and 14.1 percent, respectively.

Weld County in Colorado was the other county to experience an increase in milk marketing, showing a rise from 256.8 million pounds in December 2019 to 288.1 million pounds in December 2024, an increase of 12.2 percent. Maricopa County in Arizona, previously ninth of the top 14 in December 2019, had fewer milk marketings in December 2024, ultimately ranking outside of the top 14. In December 2024, Manitowoc County in Wisconsin had enough milk marketings to make the top 14 with roughly 144 million pounds. The remaining counties each experienced declines in milk marketings, ranging from 1.2 and 9.6 percent during the period. For more maps on the December 2024 milk marketings, please see the FO 32 June 2025 *Bulletin* at www.fmmacentral.com/monthly_news_letter.html.❖

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Computation of Producer Price Differential and Statistical Uniform Price*

	Product Pounds	Price per cwt./lb.	Component Value	Total Value
Class I— Skim	358,681,250	$12.46	$44,691,683.75	
Butterfat	9,460,884	2.7422	25,943,636.10	
Less: Location Adjustment to Handlers			(1,056,125.51)	$69,579,194.34
Class II— Butterfat	14,654,983	2.8505	41,774,029.05	
Nonfat Solids	9,670,894	1.0744	10,390,408.51	52,164,437.56
Class III— Butterfat	42,916,522	2.8435	122,033,130.29	
Protein	42,182,744	1.8730	79,008,279.52	
Other Solids	72,848,003	0.3092	22,524,602.53	223,566,012.34
Class IV— Butterfat	10,730,483	2.8435	30,512,128.42	
Nonfat Solids	13,804,389	1.0286	14,199,194.52	44,711,322.94
Total Classified Value		*Total value of milk in the pool* →		**$390,020,967.18**
Add: Value for 60 (f) through 60(j)				798,266.19
Other Source Receipts	68,685			
Total Pool Value				**$390,819,233.37**
Less: Value of Producer Butterfat	77,762,872	2.8435	(221,118,726.56)	
Value of Producer Protein	62,826,733	1.8730	(117,674,470.94)	
Value of Producer Other Solids	109,392,361	0.3092	(33,824,118.01)	(372,617,315.51)
Total PPD Value Before Adjustments		*Total Class III value of producer components*		**$18,201,917.86**
Add: Location Adjustment to Producers				9,572,293.64
One-half Unobligated Balance—Producer Settlement Fund				1,082,536.78
Less: Producer Settlement Fund—Reserve				(827,832.88)
Total Pool Milk & PPD Value	1,893,845,631			**$28,028,915.40**
Producer Price Differential		**$ 1.48**		
Statistical Uniform Price		**$ 18.80**		

Value from which PPD per hundredweight is calculated

* Price at 3.5 percent butterfat, 2.99 percent protein, and 5.69 percent other solids.