



USDA Foreign Agricultural Service

# GAIN Report

Global Agriculture Information Network

Template Version 2.09

Voluntary Report - Public distribution

**Date:** 3/2/2009

**GAIN Report Number:** NZ9004

## New Zealand

### Livestock and Products

### Cattle & Beef

### 2009

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**Report Highlights:**

CY 2009 total slaughter is forecast at 3.895 million head, down slightly from last year, but up from the 3.65 million head originally forecasted. The downturn in global dairy commodity prices has made dairy farming less profitable and tempered production. However, the surge in dairy production over the past several years means that beef production is increasingly derived from the dairy herd. Based on expected slaughter rates and updated estimates for average carcass weights, total CY 2009 beef production is forecast at 633 thousand metric tons (TMTs), up 33 TMTs from the initial forecast, but down slightly from last year. Exports are forecast at 525 TMTs (CWE), which is higher than originally forecast but down slightly from last year.

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Includes PSD Changes: Yes  
Includes Trade Matrix: No  
Semi-Annual Report  
Wellington [NZ1]  
[NZ]

## Table of Contents

<b>Section I</b> .....	<b>3</b>
Executive Summary .....	3
<b>Section II. Statistical Tables</b> .....	<b>4</b>
<b>Section III. Narrative on Supply and Demand, Policy and Marketing</b> .....	<b>6</b>
Cattle Slaughter .....	6
Revised Forecast for CY 2009 .....	6
Update for CY 2008 .....	6
Production .....	7
Revised Forecast for CY 2009 .....	7
Update for CY 2008 .....	7
Consumption .....	8
Exports .....	8
Revised Forecast for CY2009 .....	8
Update CY2008 .....	8
Imports .....	11
Policy .....	12
ASEAN, Australia & New Zealand FTA (AANZFTA) .....	12
US COOL Regulations .....	14
Marketing .....	14
China Red Meat Initiative .....	14
<b>Appendix I –Relevant Reports Submitted by the Agricultural Affairs Office</b> .....	<b>15</b>

## Section I.

### Executive Summary

CY 2009 total slaughter is forecast at 3.895 million head, down slightly from last year, but up from the 3.65 million head originally forecasted. The downturn in global dairy commodity prices has made dairy farming less profitable and tempered production. However, the surge in dairy production over the past several years means that beef production is increasingly derived from the dairy herd. Based on expected slaughter rates and updated estimates for average carcass weights, total CY 2009 beef production is forecast at 633 thousand metric tons (TMTs), up 33 TMTs from the initial forecast, but down slightly from last year. New Zealand beef and veal exports are forecast at 525 TMTs (CWE), which is higher than originally forecast but down slightly from last year. The upward revision is due to an increase in the cow and bobby calf slaughter and a return to more traditional animal carcass weights.

During CY 2008, New Zealand's exports to the more established markets were fairly static or declined slightly, while exports to Russia, continental Europe and the United Kingdom were up significantly. In CY 2009, New Zealand exporters are expected to increase their focus on the U.S. market. New Zealand's manufacturing beef exports to the U.S. market are forecast to increase this year by 14 to 21 TMTs (CWE) reaching 245 to 266 TMTs (CWE). The U.S. quota for New Zealand beef stands at approximately 299 TMT (CWE).

New Zealand beef exporters have benefited from the depreciation of the New Zealand dollar. After reaching a peak of just over 81 U.S. cents in February 2008 - its highest level since it was floated in 1985 - the New Zealand dollar now stands at approximately 50 U.S. cents. The New Zealand dollar has varied between 39 and 81 US cents since 2000.

After four years of negotiations, New Zealand, Australia and the Association of Southeast Asian Nations (ASEAN) signed a free trade agreement (FTA) in February 2009. The FTA will eventually eliminate tariffs on 99% of New Zealand's current exports to the four key ASEAN markets of Indonesia, Malaysia, the Philippines and Vietnam. On full implementation, this is estimated to equate to an annual duty savings of approximately NZ \$50 million based on current trade. Indonesia is New Zealand's largest beef export market among ASEAN countries.

## Section II. Statistical Tables

New Zealand Animal Numbers, Cattle	2007			2008			2009			Units
	Market Year Begin: Jan 2007			Market Year Begin: Jan 2008			Market Year Begin: Jan 2009			
	Off. Data	Post Est.	New Post Data	Off. Data	Post Est.	New Post Data	Off. Data	Post Est.	New Post Data	
Total Cattle Beg. Stks	9,610	9,610	9,610	9,730	9,730	9,730	9,833	9,833	9,777	(1000 HEAD)
Dairy Cows Beg. Stks	4,163	4,163	4,163	4,280	4,280	4,280	4,400	4,400	4400	(1000 HEAD)
Beef Cows Beg. Stocks	1,270	1,270	1,270	1,200	1,200	1,200	1,130	1,130	1130	(1000 HEAD)
Production (Calf Crop)	4,192	4,192	4,192	4,296	4,296	4,446	4,350	4,350	4500	(1000 HEAD)
Intra-EU Imports	0	0	0	0	0		0	0		(1000 HEAD)
Other Imports	0	0	0	0	0		0	0		(1000 HEAD)
Total Imports	0	0	0	0	0		0	0	0	(1000 HEAD)
Total Supply	13,802	13,802	13,802	14,026	14,026	14,176	14,183	14,183	14277	(1000 HEAD)
Intra EU Exports	0	0	0	0	0		0	0		(1000 HEAD)
Other Exports	28	28	28	18	18	17	18	18	15	(1000 HEAD)
Total Exports	28	28	28	18	18	17	18	18	15	(1000 HEAD)
Cow Slaughter	635	635	635	640	640	701	700	700	775	(1000 HEAD)
Calf Slaughter	1,343	1,343	1,338	1,350	1,350	1488	1,450	1,450	1550	(1000 HEAD)
Other Slaughter	1,591	1,591	1,589	1,685	1,685	1718	1,500	1,500	1570	(1000 HEAD)
Total Slaughter	3,569	3,569	3,562	3,675	3,675	3907	3,650	3,650	3895	(1000 HEAD)
Loss	475	475	482	500	500	475	482	482	475	(1000 HEAD)
Ending Inventories	9,730	9,730	9,730	9,833	9,833	9777	10,033	10,033	9892	(1000 HEAD)
Total Distribution	13,802	13,802	13,802	14,026	14,026	14176	14,183	14,183	14277	(1000 HEAD)
CY Imp. from U.S.	0	0		0	0		0	0		(1000 HEAD)
CY. Exp. to U.S.	0	0		0	0		0	0		(1000 HEAD)

New Zealand Meat, Beef and Veal	2007			2008			2009			Units
	Market Year Begin: Jan 2007			Market Year Begin: Jan 2008			Market Year Begin: Jan 2009			
	Off. Data	Post Est.	New Post Data	Off. Data	Post Est.	New Post Data	Off. Data	Post Est.	New Post Data	
Slaughter (Ref.)	3,569	4,050	3562	3,675	3,675	3907	3,650	3,650	3,895	(1000 HD)
Beginning Stocks	0	0	0	0	0	0	0	0	0	(1000 MT CWE)
Production	607	730	607	618	618	644	600	600	633	(1000 MT CWE)
Intra-EU Imports	0	0		0	0		0			(1000 MT CWE)
Other Imports	12	10	12	12	12	12	12	12	12	(1000 MT CWE)
Total Imports	12	10	12	12	12	12	12	12	12	(1000 MT CWE)
Total Supply	619	740	619	630	630	656	612	612	645	(1000 MT CWE)
Intra EU Exports	0	0		0	0		0			(1000 MT CWE)
Other Exports	496	620	496	515	515	533	497	497	525	(1000 MT CWE)
Total Exports	496	620	496	515	515	533	497	497	525	(1000 MT CWE)
Human Dom. Consum.	123	120	123	115	115	123	115	115	120	(1000 MT CWE)
Other Use, Losses	0	0		0	0		0	0	0	(1000 MT CWE)
Total Dom. Consum.	123	120	123	115	115	123	115	115	120	(1000 MT CWE)
Ending Stocks	0	0		0	0	0	0	0	0	(1000 MT CWE)
Total Distribution	619	740	619	630	630	656	612	612	645	(1000 MT CWE)
CY Imp. from U.S.	0	0	0	0	0		0	0	0	(1000 MT CWE)
CY. Exp. to U.S.	238	295	238	235	235	251	245	245	266	(1000 MT CWE)

## Section III. Narrative on Supply and Demand, Policy and Marketing

### Cattle Slaughter

#### Revised Forecast for CY 2009

CY 2009 total slaughter is forecast at 3.895 million head, down slightly from last year, but up from the 3.65 million head originally forecasted.

The downturn in global dairy commodity prices has made dairy farming less profitable, which has tempered production. Conversions from sheep and beef farms to dairy farms have slowed, as has the tendency to increase stocking rates. However, the previously planned dairy conversions that are still taking place in 2009 will need to be stocked and a small amount of herd rebuilding is expected in the beef cow sector. In light of these factors, Post is forecasting cow slaughter at 775,000 head, which is up from the previous estimate but still on the low end of what would be expected. (Note: Since 1986, the dairy cow herd has grown at 2% per annum. Assuming a total cow herd of 5.6 million head growing between 1 and 2% a year, between 775,000 and 850,000 cows would be culled each year.) Weekly figures published by the Ministry of Agriculture and Forestry (MAF) indicate that the cow slaughter rate for the first 19 weeks of the 2008/09 season (October 1/September 30) is 45% ahead of the previous year.

Post is revising the calf kill forecast upward to 1.55 million head, or 100,000 head higher than the previous forecast. It is unlikely that there will be demand to rear the calves generated by dairy farming for either dairy or beef herd replacements.

Post is forecasting other cattle slaughter during CY 2009 at 1.57 million head, an 8.6% drop from last year but up from the 1.5 million head originally forecast. This estimate is in line with forecasts provided by Meat and Wool New Zealand, which has access to survey data regarding on-farm livestock numbers and farmer intentions.

#### Update for CY 2008

According to the Ministry of Agriculture and Forestry (MAF) and Statistics New Zealand, the total slaughter for CY 2008 was 3.91 million head, which is 6% higher than our previous estimate of 3.68 million head.

Cow slaughter was 701,000 head in CY 2008, up 9.5% from our previous estimate of 640,000 head. The larger than expected increase in cow kill is primarily attributable to tight pasture supplies during the spring of 2008 (August – October) – a legacy from the drought earlier in the year. Also, some farmers took the opportunity to cull cows while prices were relatively high.

CY 2008 calf slaughter was 1.49 million head, a 10% increase over the previous estimate. The difference is attributable to a combination of factors, including fewer calves being reared for both dairy and beef herds, and an overall increase in the total number of cows calving (approximately 130,000 head).

Post has revised the CY 2008 other slaughter figure to 1.72 million head, up from the 1.69 million head in our August 2008 report. Again, the lingering effects of the drought forced farmers to sell livestock because of low pasture supplies. In addition, high slaughter prices

during the August to October 2008 period encouraged farmers to sell any cattle that could be sold as prime.

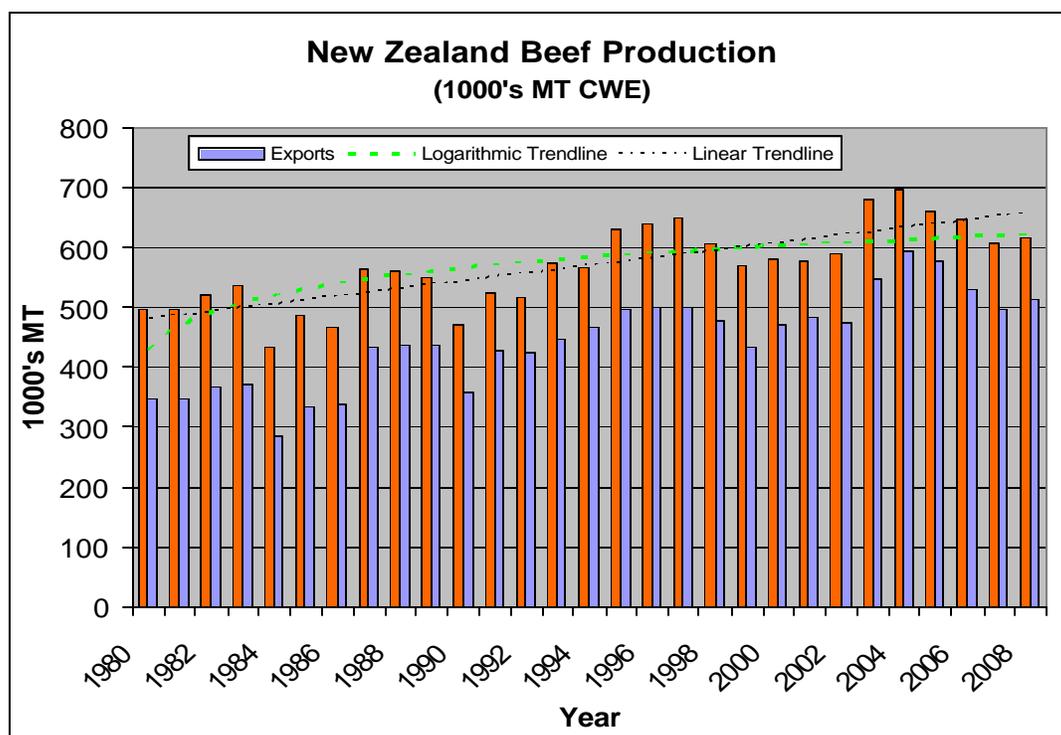
## Production

### Revised Forecast for CY 2009

Based on expected slaughter rates and updated estimates for average carcass weights, total beef production is forecast at 633 thousand metric tons (TMTs), up 33 TMTs from the initial forecast. Historically, average cow slaughter weight drops when a higher proportion of dairy cows are killed. In view of this, post is using a figure of 199 kilograms per cow, down from the 203 to 204 kilograms used over the past two years. Based on historical averages, calf slaughter weight is estimated at 16.9 kilograms. For other adult cattle, post is using a figure of 288 kilograms for the average carcass weight. Average weights fell to 277 kilograms in 2008, down from a long-term average in the range of 286 to 288 kilograms. However, improved pasture conditions and lower stocking rates suggest a return to 288 kilograms.

### Update for CY 2008

As a result of the higher than expected slaughter rate, total beef production reached 644 TMTs (CWE) as compared to a previous estimate of 618 TMTs (CWE). After hovering between 286 and 288 kilograms from 2005 to 2007, average slaughter weights for other adult cattle fell to 277 kilograms - a direct consequence of the drought.



Source: FAS PSD Data

## Consumption

At 123 TMTs (CWE), beef consumption held up better than expected during CY 2008. Post expects domestic consumption to fall slightly in CY 2009, but by less than originally forecast. The revised forecast is 120 TMTs (CWE), which is a 2.5% decline from the previous year.

## Exports

### Revised Forecast for CY2009

Post has revised the CY 2009 forecast for total beef and veal exports upward to 525 TMTs (CWE) from our previous estimate of 497 TMTs (CWE). The upward revision is due to an increase in the cow and bobby calf slaughter and a return to more traditional animal carcass weights.

Over time, the increase in dairy cow slaughter will alter the composition of New Zealand beef production toward more manufacturing beef, which suggests that New Zealand exporters will increase their focus on the U.S. market. Manufacturing beef exports to the U.S. market in CY 2009 are forecast to increase by 14 to 21 TMTs (CWE) reaching 245 to 266 TMTs (CWE). The U.S. quota for New Zealand beef stands at approximately 299 TMT (CWE).

While New Zealand exporters have established a niche market in South Korea for grass-fed beef, the overall tide of Korean consumer sentiment for beef consumption appears to be falling. Trade contacts expect exports to Korea to drop in CY 2009 but those with established customers are expected to maintain export volumes. The extent of the drop in exports will be determined by prices. Some companies are reportedly already stemming production of the boned cuts popular in South Korea as the margins are too slim and it's more profitable to divert product to other markets. While South Korea is still New Zealand's second largest destination by volume, exports have not returned to the peak level of 51 TMTs reached in 2004.

Because New Zealand is forecast to produce 4-5% less prime beef in CY 2009, New Zealand exports to some of the higher value export destinations, will likely fall.

### Update CY2008

Total beef exports for CY 2008 were 533 TMT (CWE), which surpassed post's August estimate by 18 TMT. The lingering effects of last year's drought, combined with rapidly falling dairy commodity prices, contributed to a larger than expected cow kill during the last quarter of CY 2008. This, coupled with extra bobby calves killed, account for most of the increase in exports.

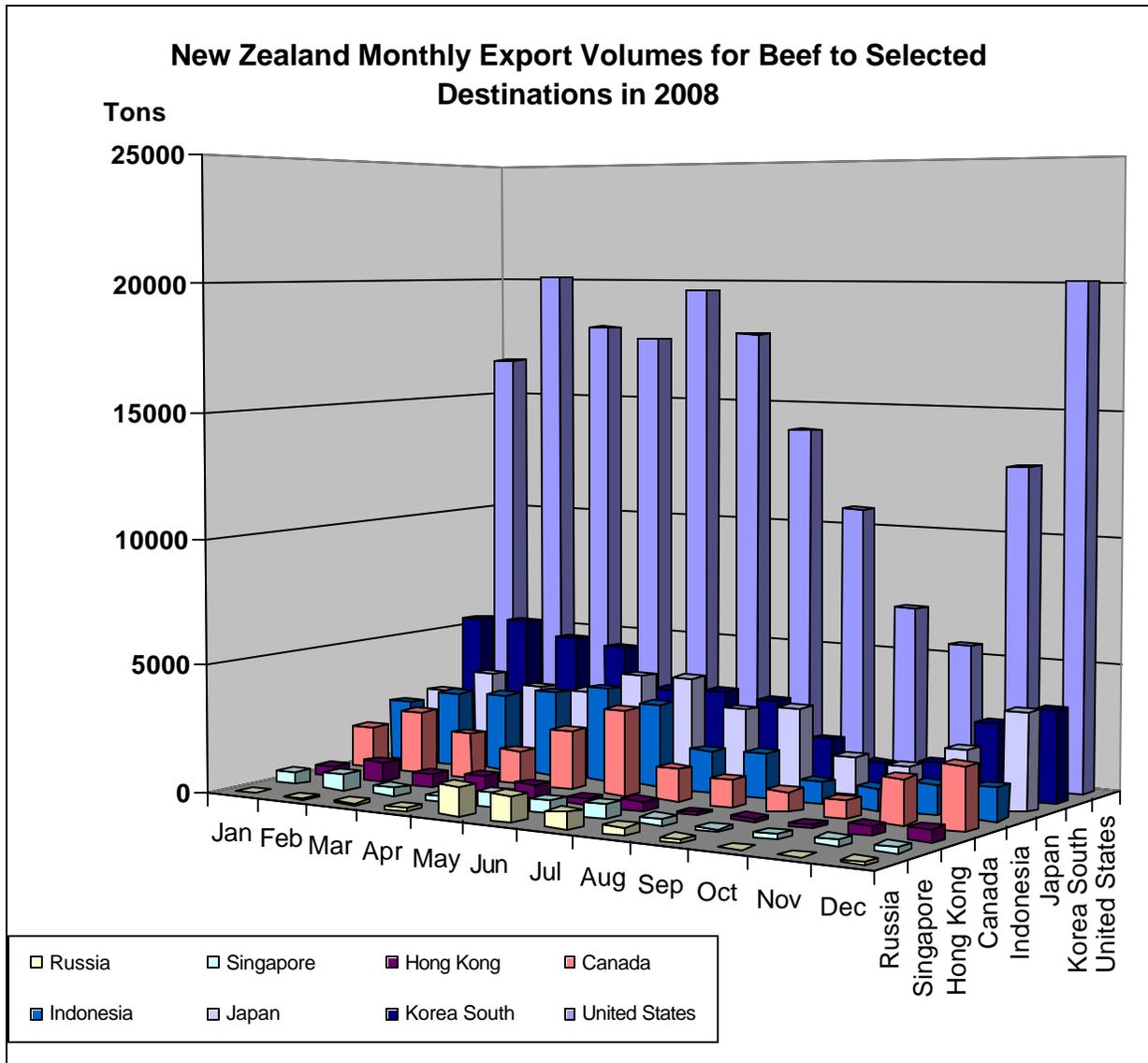
Exports to the United States reached 251 TMT (CWE) in CY 2008 reversing a prolonged downward trend. The extra production that came on stream during the latter part of CY 2008 was primarily 90% chemical lean cow meat or bobby calf veal. This, combined with record high U.S. prices during the 2<sup>nd</sup> and 3<sup>rd</sup> quarters of CY 2008 for manufacturing beef, meant that most of New Zealand's increased production went to the U.S. market. With the exception of Indonesia, some manufacturing product was diverted from the lower margin Asian markets to the United States. Indonesia is New Zealand's fourth largest market and continues to be a growth market for lower value cuts.

The United States continues to be the single largest market for New Zealand beef exports accounting for 47% of the total in CY 2008. On a regional basis, the Pacific Rim continues to be the top market for New Zealand beef exports accounting for 90% of total exports.

New Zealand Beef Exports								
Destination Country	Unit: Metric Tons						% trend p.a	% of Total in 2008
	2003	2004	2005	2006	2007	2008		
United States	222113	212431	203484	187974	170043	179623	-5.0%	47.2%
Korea South	27625	50951	45822	45629	41129	39915	3.5%	10.5%
Japan	20915	38146	42591	40212	36071	35266	7.1%	9.3%
Indonesia	9015	12421	14177	19188	25506	26281	25.0%	6.9%
Canada	41718	29494	29823	24706	25679	21054	-10.9%	5.5%
Taiwan	22221	30372	29440	22762	20641	19273	-5.9%	5.1%
Philippines	2580	4426	3025	2486	3665	7970	15.0%	2.1%
Hong Kong	3009	2843	2427	2615	3026	4707	7.4%	1.2%
French Polynesia	5563	5812	5481	4716	4110	4578	-6.0%	1.2%
Singapore	2318	2491	2206	2460	3203	4422	12.4%	1.2%
<i>Sub-Total top 10 in 2008</i>	<i>357077</i>	<i>389387</i>	<i>378476</i>	<i>352748</i>	<i>333073</i>	<i>343089</i>	<i>-2.1%</i>	<i>90%</i>
Russia	38	28	63	554	184	3820	141.6%	1.0%
United Kingdom	630	329	309	1087	973	3711	46.6%	1.0%
Australia	2942	5287	6819	4950	3451	3085	-3.8%	0.8%
Malaysia	6878	7738	6624	0	288	1730	-54.9%	0.5%
United Arab Emirates	886	1162	1023	1208	1321	1656	11.1%	0.4%
Italy	89	38	57	121	120	1650	71.1%	0.4%
Germany	151	118	138	144	260	1604	50.2%	0.4%
Trinidad & Tobago	1488	296	152	422	123	1292	-6.4%	0.3%
Mexico	6667	5794	6543	3823	1948	1228	-29.6%	0.3%
Spain	97	67	227	212	145	1122	51.3%	0.3%
<i>Sub-Total top 20 in 2008</i>	<i>376943</i>	<i>410244</i>	<i>400431</i>	<i>365269</i>	<i>341886</i>	<i>363987</i>	<i>-2.3%</i>	<i>96%</i>
Rest of the World	14483	13925	11883	13410	12531	16720	1.5%	4.4%
Total Beef Exports	391428	424171	412314	378677	354420	380713	-2.2%	100%

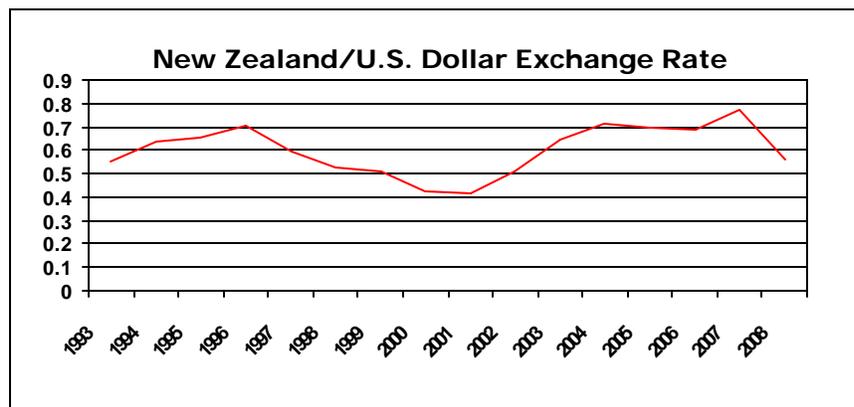
Source: Global Trade Atlas

During CY 2008, New Zealand's exports to the more established markets were static or declined slightly, while exports to Russia, continental Europe and the United Kingdom were up significantly. These markets reportedly offered prices well above world prices and were an outlet for prime beef exports that previously would have been destined for Asian and U.S. customers. New Zealand exporters also benefited from the EU restrictions on Brazilian beef. However, New Zealand's exports to the EU market are limited by the number of cattle available produced without Hormone Growth Promotant (HGP).

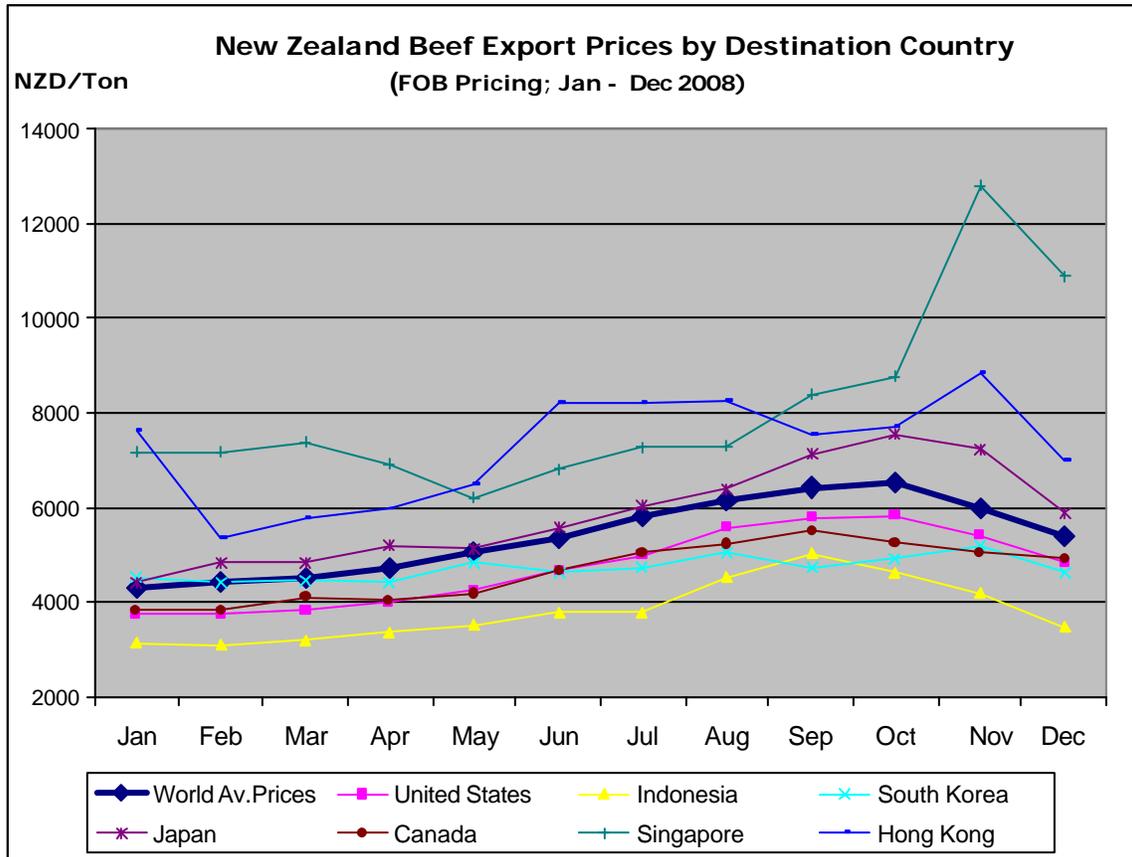


Source: Global Trade Atlas

After a long period of a strong New Zealand dollar, which eroded export returns, the Kiwi dollar depreciated significantly in CY 2008.



The chart below shows the uptick in prices during the 2<sup>nd</sup> and 3<sup>rd</sup> quarters of 2008, which was helped by the depreciation of the New Zealand dollar against the U.S. dollar. However, in spite of the weaker NZ dollar, prices trended downward during the last quarter of CY 2008.



Source: Global Trade Atlas

## Imports

New Zealand beef and veal imports are fairly constant 12 TMT (CWE). Australia is the largest supplier.

## Policy

### ASEAN, Australia & New Zealand FTA (AANZFTA)

After four years of negotiations, New Zealand, Australia and the Association of Southeast Asian Nations (ASEAN) signed an FTA in February 2009. The FTA will eventually eliminate tariffs on 99% of New Zealand's current exports to the four key ASEAN markets of Indonesia, Malaysia, the Philippines and Vietnam. On full implementation, this is estimated to equate to an annual duty savings of approximately NZ \$50 million based on current trade.

The Philippines will eliminate tariffs on key beef exports by 2012 and, as this was a sensitive tariff item for Indonesia, between 2010 and 2020. (See table below.) Vietnam will eliminate beef tariffs by 2018. Tariffs on sheep meat will be eliminated in 2010 for the Philippines and 2016 for Vietnam.

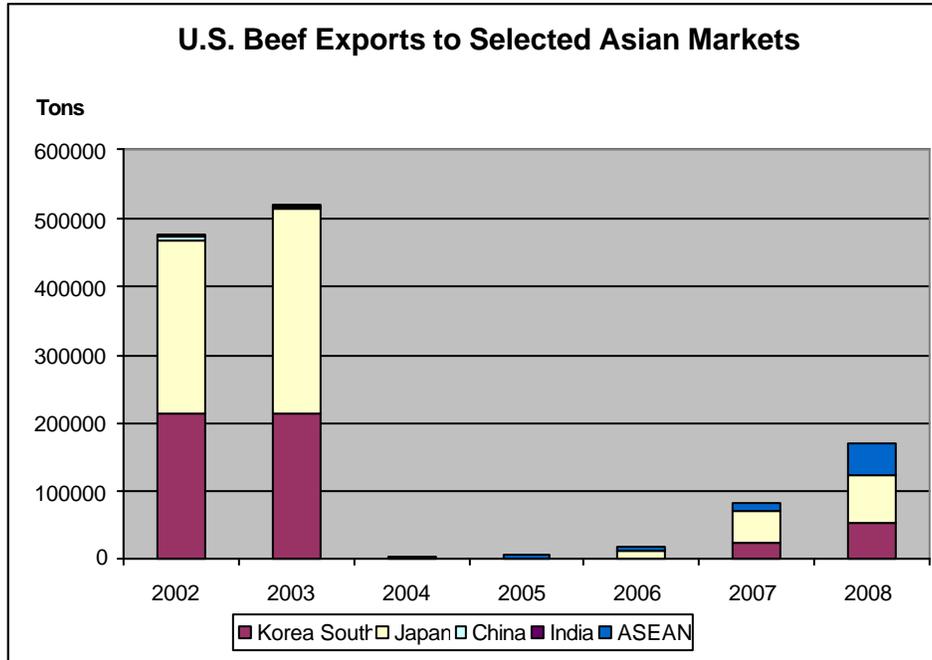
The agreement does not contain any specific agricultural safeguards.

Selected Tariff Rate Schedules for Beef						
Country	Indonesia					Vietnam
HS Code	0201.10, 0201.20	0201.30	0202.10	0202.20	0202.30	0201, 0202
Description	Meat; of bovine animals, carcasses and half carcasses, fresh or chilled: Carcasses and half carcasses	Meat; of bovine animals, boneless cuts, fresh or chilled: Boneless	Meat; of bovine animals, carcasses and half carcasses, frozen: Carcasses and half carcasses	Meat; of bovine animals, cuts with bone in (excluding carcasses and half carcasses), frozen: Other cuts with bone in	Meat; of bovine animals, boneless cuts, frozen: Boneless	Meat; of bovine animals, carcasses and half-carcasses, fresh, chilled or frozen
Base Rate	5	5	5	5	5	20
2009	5	5	5	U	5	20
2010	free	5	free	U	5	15
2011	free	5	free	U	5	15
2012	free	5	free	U	5	10
2013	free	5	free	U	5	10
2014	free	5	free	U	5	7
2015	free	5	free	U	5	7
2016	free	5	free	U	5	5
2017	free	5	free	U	5	5
2018	free	5	free	U	5	free
2019	free	5	free	U	5	free
2020	free	free	free	U	free	free
2021	free	free	free	U	free	free
2022	free	free	free	U	free	free
2023	free	free	free	U	free	free
2024	free	free	free	U	free	free
2025	free	free	free	U	free	free
End Date	2010	2020	2010	NA	2020	2018

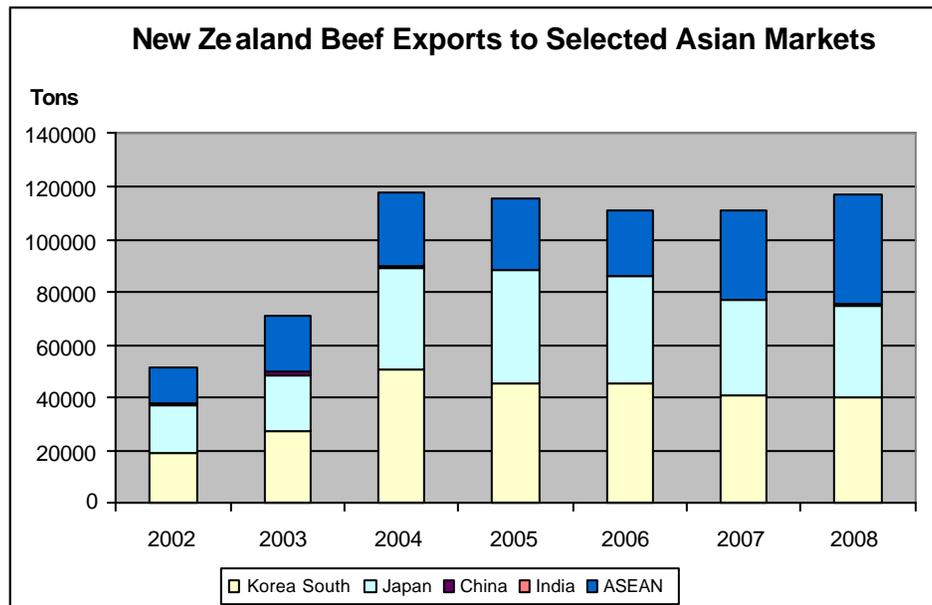
Note: U means there are no tariff commitments under AANZFTA for this particular line.

Source: <http://www.asean.fta.govt.nz/tariff-finder>

Among ASEAN countries, Indonesia is the top destination for New Zealand beef exports. In CY 2008, New Zealand beef exports to Indonesia were 26,281 tons (PWE) compared to just 266 tons for Vietnam. By contract, Vietnam is the major ASEAN destination for the United States taking 39,654 tons (PWE) in CY 2008 compared to just 305 tons (PWE) for Indonesia. The reduction in tariff rates will likely encourage increased exports from New Zealand to the Vietnamese market.



Source: Global Trade Atlas



Source: Global Trade Atlas

## US COOL Regulations

According to industry contacts, the logistical effects and compliance costs associated with the new U.S. Country of Origin Labeling Regulations (see [www.ams.usda.gov/cool](http://www.ams.usda.gov/cool)) shouldn't be too significant. Most of New Zealand's exports to the U.S. market are manufacturing beef, which is further processed in the United States and used by the hotel/restaurant sector. However, New Zealand exporters are still trying to understand exactly what the regulations will require. Generally, it is felt that, while the effect is likely to be minimal, it will not be positive. One exporter noted it will become another device which importers will use to try to drive prices down.

## Marketing

### China Red Meat Initiative

In early February 2009, Meat and Wool New Zealand, an industry association representing producers, joined with three meat exporters - Alliance Group Ltd., Anzco Foods Ltd., and Silver Fern Farms Ltd. - to identify opportunities for New Zealand red meat in China's "super premium" food sector. According to Meat and Wool New Zealand, China has been a significant market, particularly for lower value sheep meat items, but there has not been a collective approach to develop the high-value segment of the market. Based on market research carried out last year by the group, New Zealand's recently signed FTA with China could provide new export opportunities for meat companies. Market entry strategies are expected to be developed by the end of May 2009. The project is partly funded by Trade and Enterprise New Zealand, a government entity, with the remainder coming from Meat and Wool New Zealand and the meat exporters themselves.

New Zealand's former Prime Minister Helen Clark and Chinese Premier Wen Jiabao signed a bilateral free trade agreement (FTA) in Beijing on April 7, 2008. The FTA is comprehensive covering goods, services and investment, and provides for the elimination over time of tariffs on 96% of New Zealand's exports to China. On full implementation, this will equate to an annual duty savings of NZ \$115.5 million. In addition to the FTA, a binding Memorandum of Understanding on Labor was signed with the intention of encouraging dialogue and promoting sound labor policies and practices. A binding agreement on environmental cooperation was also signed with the aim of encouraging sound environmental practices and improving the capacity of each country to address environmental matters through cooperation and dialogue.

China is New Zealand's fourth largest export market. Major exports to China are dairy products, wood and wood pulp, wool, fish, meat and aluminum. Preliminary estimates put the value of the FTA to New Zealand exporters at between NZ \$180 million and NZ \$280 million a year. New Zealand goods now face average tariffs of about 9.5% on entering China – but in the case of agricultural imports, the average tariff is more than 15%. (China currently imposes tariffs of 10% on milk powder, 15% on butter, cheese and yoghurt, 12% on beef, 12% to 20% on sheep meat, and up to 20% on kiwifruit.) The FTA calls for a fairly rapid phase-out of tariffs. On entry into force (which was October 2008), duties on products that currently face tariffs of 5% or less will be eliminated. By 2012, duties in the range of 6-20% will be phased out and, by 2013; duties greater than 20% will be phased out. Remaining tariffs, including those assessed on "sensitive" agriculture products, will be phased out by January 1, 2019.

## Appendix I –Relevant Reports Submitted by the Agricultural Affairs Office

Relevant Reports Submitted by the Agricultural Affairs Office		
NZ8006	Livestock and Products March 2008 Update	March 27, 2008
NZ8007	New Zealand Announces FTA with China	April 17, 2008
NZ8009	Dairy Semi-Annual	May 16, 2008
NZ 8020	Livestock Annual	September 3, 2008
NZ8021	Animal Cloning in NZ	September 2, 2008
NZ 8022	Report on ASEAN Meeting	September 2, 2008
NZ 8026	Dairy Industry Report	October 28, 2008
NZ9002	Dairy Industry Voluntary Report	February 10, 2009