



OHIO'S DAIRY COMMUNITY



Scott Higgins
CEO & President

DAIRY STATISTICS

	UNITED STATES	OHIO
Dairy Farms	34,100 dairy farms	1,750 dairy farms
Dairy Cows	9.3 million	252,000
Total Milk Production	25.3 billion gallons	628 million gallons
Average Herd Size	272 cows	144 cows
Economic Impact	\$619 billion	\$23.8 billion
Jobs Created	3 million	115,000

OHIO'S NATIONAL RANKINGS

1st in Swiss cheese production

2nd in lowfat cottage cheese production

4th in hard ice cream production

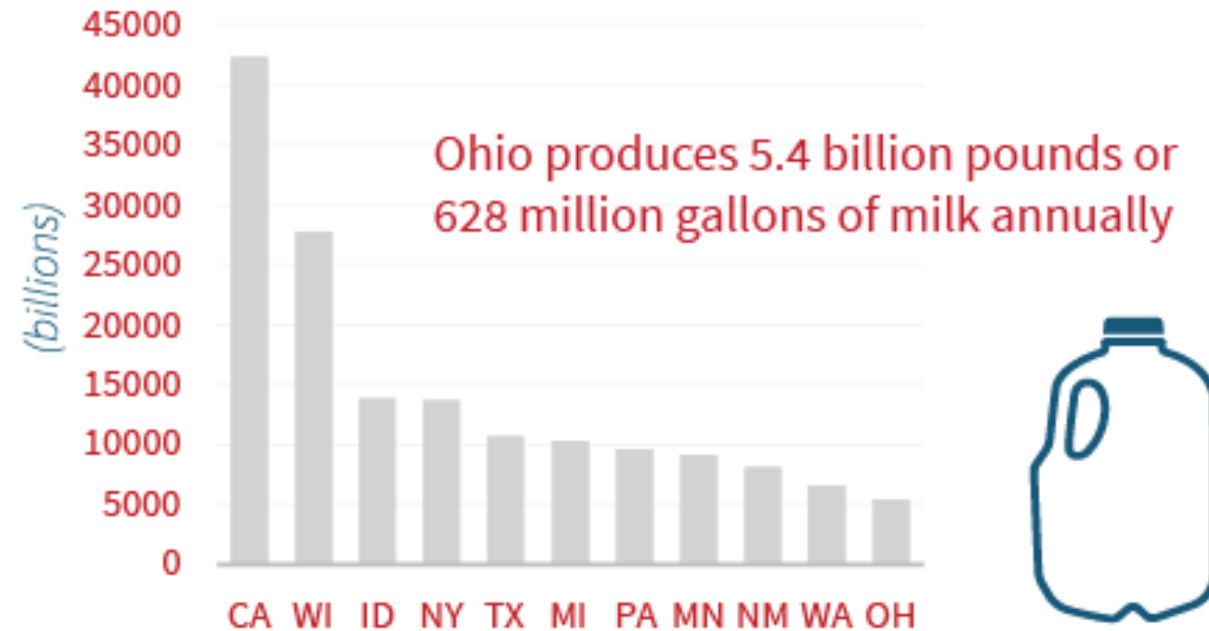
5th in total number of dairy manufacturing plants

10th in all cheese production

11th in milk production

11th in number of dairy cows

OHIO RANKS 11TH IN MILK PRODUCTION



TOP 10 DAIRY COUNTIES IN OHIO

COUNTY	# FARMS	# COWS	Avg. SIZE
• Wayne	217	31,500	145
• Mercer	75	17,600	235
• Holmes	265	17,500	66
• Paulding	10	8,900	890
• Tuscarawas	50	8,500	170
• Stark	46	8,200	178
• Columbiana	62	8,000	129
• Darke	33	8,000	242
• Williams	3	N/A	N/A
• Shelby	33	7,200	218

DAIRY TRENDS

- **Number of dairy farms continues to decline**
 - 650,000 farms in 1970 to 38,000 in 2018
- **Number of cows per farm continues to grow**
- **Fewer cows in Ohio**
 - 446,000 in 1970 vs 252,000 in 2019
- **Focus on efficiency & environmental stewardship**
- **Robotic milking technology in Ohio**
 - 2016: 37 farms
 - 2020: 61 farms with 199 robots

DAIRY CHALLENGES

- **Dairy farm economics**
- **Myths and misinformation**
- **Anti-agriculture groups**
- **Environment and water quality regulations**
- **Dairy labeling**

VISION

U.S. Dairy as an Environmental Solution

GOALS

By 2050, U.S. dairy collectively commits to:

BECOME CARBON
NEUTRAL OR BETTER

OPTIMIZE WATER USE WHILE
MAXIMIZING RECYCLING

IMPROVE WATER QUALITY
BY OPTIMIZING UTILIZATION
OF MANURE AND NUTRIENTS

OVERARCHING
STRATEGY

U.S. Dairy Net Zero Initiative (NZI)

KNOCKING DOWN BARRIERS TO ACHIEVE NET ZERO GHG AND SIGNIFICANT IMPROVEMENTS IN WATER FROM FIELD TO FARM GATE

WORKSTREAMS

GROUNDWORK

Foundational work on environmental and economic analysis, research and measurement to inform decisions, update models and advance outcomes for farms

DAIRY SCALE FOR GOOD (DS4G)

Expedited economic and environmental projects on a small set of pilot farms to prove the business case, decrease capital cost and create additional revenue streams as a catalyst for solutions on all farms

COLLECTIVE IMPACT

Collaborative action to stimulate greater access to technical, financial and educational support and motivate the adoption of environmental practices across farms of all sizes, regions and designs



and member constituents

DAIRY LABELING

The Issue

Imitation dairy foods, like those made from soy, almond or other non-dairy ingredients, are being labeled as dairy foods.

The Concerns

- FDA labeling regulations are not being enforced
- Misappropriation of milk's "health halo"
- Misleading the public

73%

of consumers believed that almond-based drinks had as much or more protein per serving than milk, even though milk has eight times as much protein.*

53%

said they believed that plant-based food manufacturers labeled their products "milk" because their nutritional value is similar. It isn't, and manufacturers know the value is less.

68%

of consumers who solely purchase plant-based beverages strongly or somewhat agreed that those drinks have the same nutritional content as dairy milk.

DAIRY LABELING

The Goals

- FDA to enforce the current standards of identity for dairy foods.
- FDA to not allow imitation dairy foods to bear the names of traditional or standardized dairy foods.

#GOTREALMILK
It's time for FDA to get real about enforcing milk labeling laws.

U.S. Canada U.K.

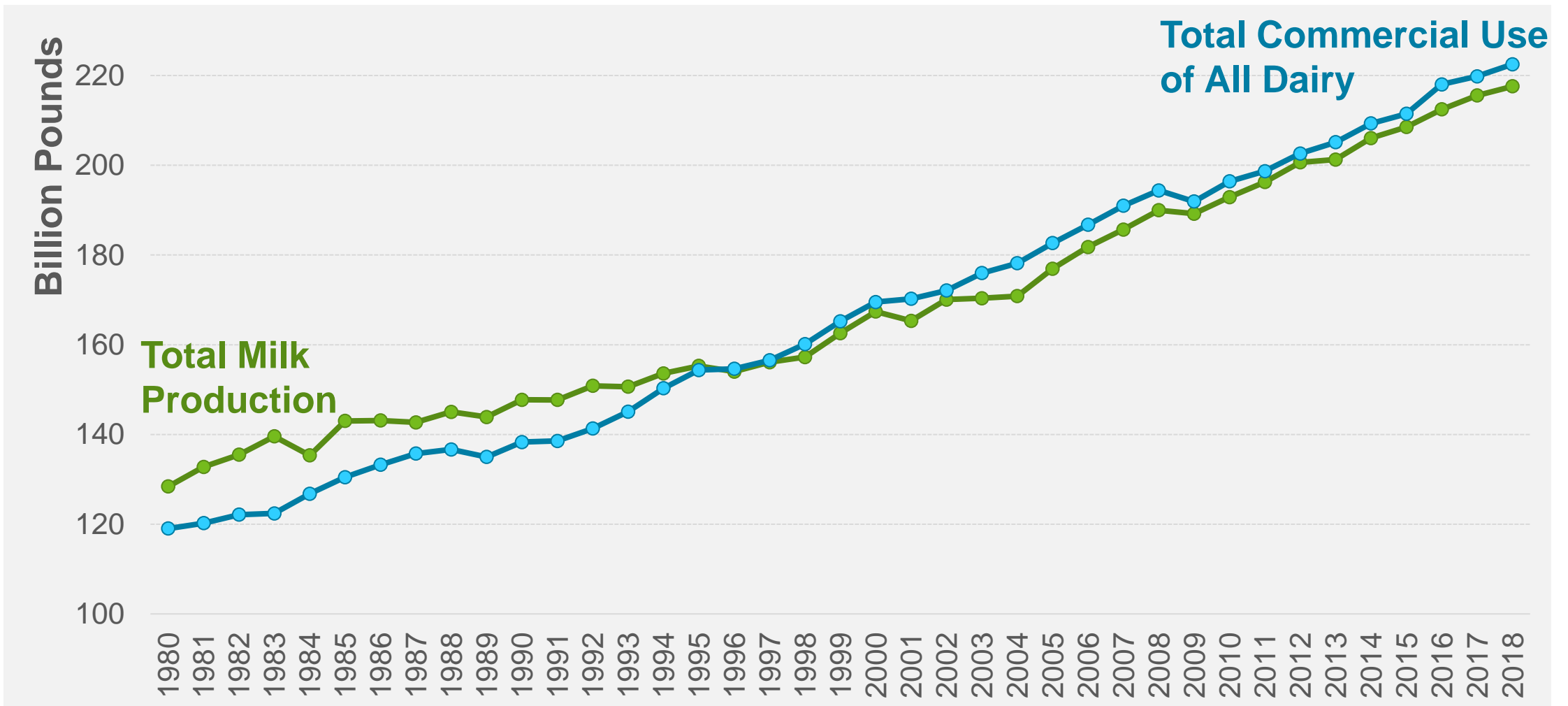


The image shows three cartons of Almond Breeze. The U.S. carton is labeled 'Almond Breeze ALMONDMILK' with 'ALMONDMILK' circled in red. The Canada carton is labeled 'Almond Breeze' and 'VANILLA VANILLE'. The U.K. carton is labeled 'Almond Breeze' and 'VANILLA FLAVOUR'. A speech bubble with the text 'They don't "got" milk!' has red arrows pointing to the 'Almond Breeze' brand name on the Canadian and U.K. cartons.

They don't "got" milk!

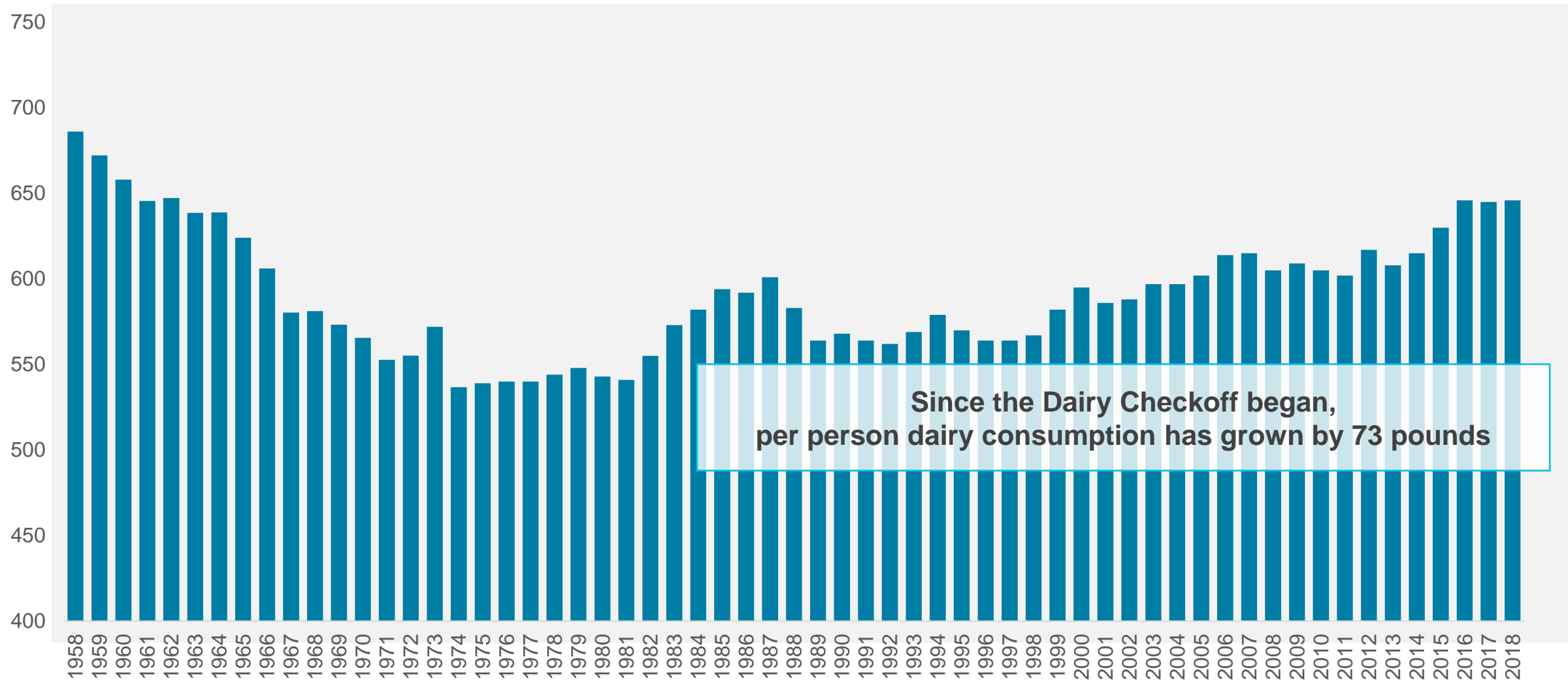
Regulations in Canada and the United Kingdom don't allow the use of "milk" as a name for Almond Breeze, the same brand sold in the United States as "almondmilk."

MILK PRODUCTION VS COMMERCIAL DISAPPEARANCE



Source: USDA ERS; Commercial use of milk in all dairy products on a milk equivalent, milkfat basis, includes exports

U.S. DAIRY CONSUMPTION PER CAPITA

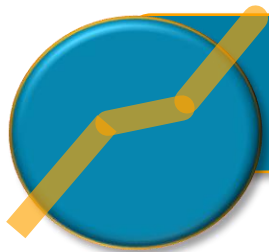


Source: USDA ERS Dairy Data 1975-2018; USDA ERS Food Availability 1958-1974

Note: To account for milk that is used in all dairy products, individual product quantities are converted to a milk equivalent based on their milkfat content and then aggregated

This measure is a proxy for consumption as it is based on product available to be consumed

DAIRY: A POWERFUL CATEGORY



GROWTH

25 Years

of Per Capita
Growth

2.5% Growth

through August 2019



SALES

\$100+ Billion

Retail Sales



PENETRATION

98% Cheese

94% Milk

86% Ice Cream

83% Yogurt

74% Butter

DAIRY PRODUCT PER CAPITA CONSUMPTION



BUTTER

2018: 5.7 lbs
Highest amount
in 50 years



ICE CREAM

2018: 18.3 lbs
Down from
19 lbs in 2017



YOGURT

2018: 13.4 lbs
Dip of -2.6%
from 2017
*Yogurt is a small part
of milk utilization*



FLUID MILK

2018: 146 lbs
Down from
150 lbs in 2017



CHEESE

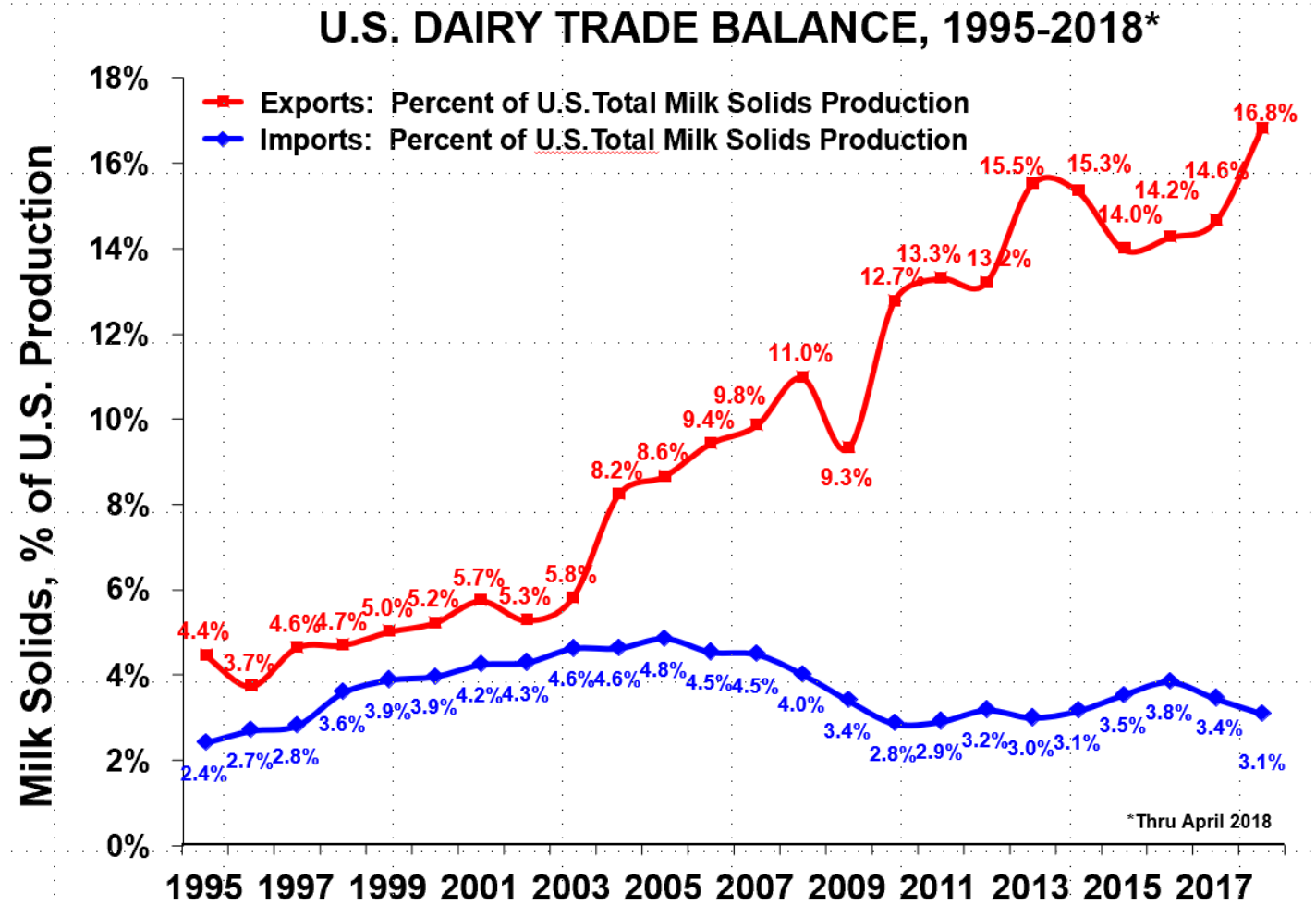
2018: 37.9 lbs
Highest amount ever

EXPORTS & INTERNATIONAL PARTNERSHIPS



U.S. Dairy
Export Council®

Ingredients | Products | Global Markets



Power of Partnerships

Coalition Partnerships

Targeted Partnerships

More Sales
More Trust

Industry-wide Partnerships



Ingredients | Products | Global Markets



GLOBAL DAIRY PLATFORM

National Dairy
Foods Research
Centers



300+ Companies

YOUTH WELLNESS



— BUILT WITH —
**CHOCOLATE
MILK**



SOCIAL MEDIA & CONSUMER CONFIDENCE



ADA Mideast @adamideast · Apr 3

There's a lot you may not know (but should) about non-dairy milks like soy, almond and coconut.



Decoding the Dairy Case

There's something for everyone in the dairy case, but having so many options can be overwhelming. See how cow's milk stacks up against "milk" alternatives like soy, almond, rice and coconut beverages.



American Dairy Association Mideast

Published by Allison Ryan [?] · March 10 at 8:53am · 🌐

Dairy farming is challenging but also very rewarding. Ohio dairy farmer Roger Broering says that the work ethic his four children learn from helping on the family's farm will help them in everything they do. <http://bit.ly/2CabAzv>



ADA Mideast @adamideast · Mar 24

Awesome win for the 2018 @OHSAA Sports Division IV state champs! Now it's time for @MarionLocalBB to Fuel Up with Chocolate Milk!



American Dairy Association Mideast

Published by Hana Biellauskas [?] · March 30 at 4:04pm · 🌐

Use leftover Easter eggs to make Broccoli Cheddar Egg Cups for a high-protein, freezer-friendly breakfast all week. <http://bit.ly/2aPC4JR>





TM

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60+ Videos on Drink-Milk.com

ABOUT ADA MIDEAST FOR FARMERS BLOG f i p t

DAIRY FARMING ▾ DAIRY FOODS ▾ DAIRY NUTRITION ▾ DAIRY IN SCHOOLS ▾

Meet Paul Keener: Building a Dairy Farm
Ohio dairy farmer shares how he built his dairy farm from scratch.

What Do Cows Eat?
Dairy farmers and nutritionists work together to provide cows with a well-balanced diet.

3 EASY GREEK YOGURT DIPS
Try these easy Greek yogurt dips the next time you're craving a healthy snack!

EASY CHEESE PAIRINGS
Check out these easy cheese pairing ideas to make your own cheese plate at home!

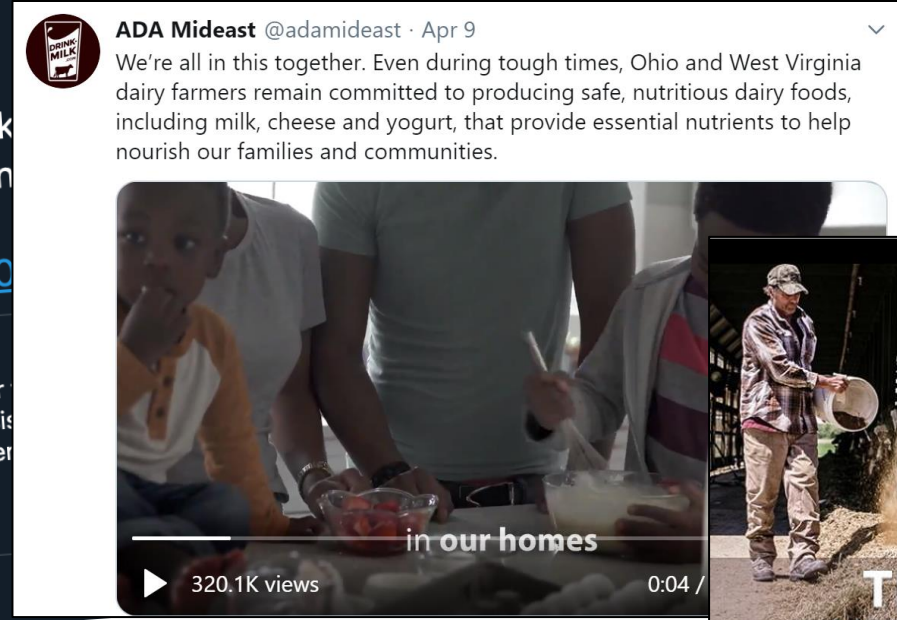
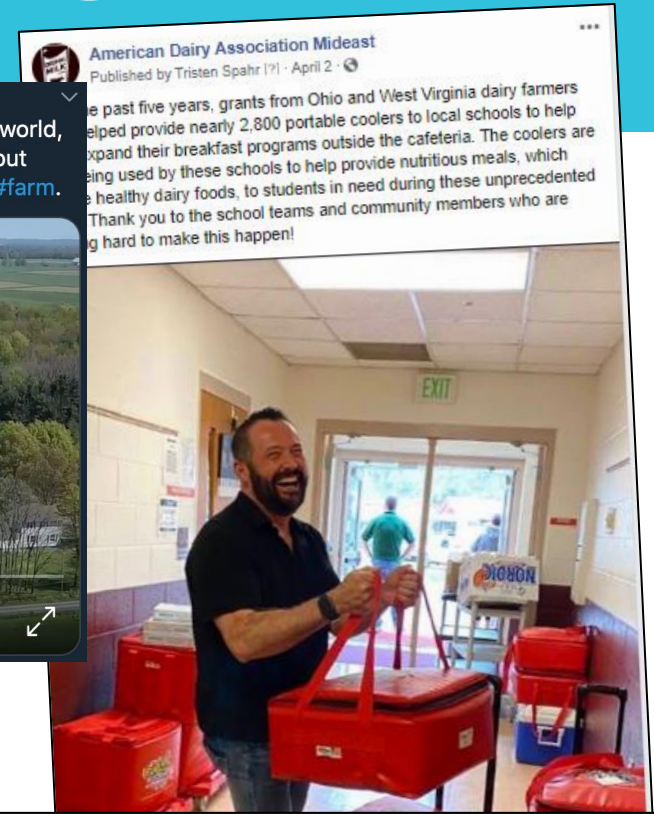
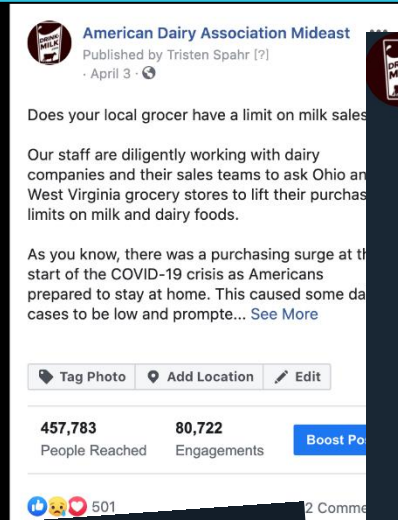
Because That's What Families Do
Ohio and West Virginia dairy farmers continue to work hard to keep our families nourished.

Milk: Trusted by Athletes
Throughout her lifetime, U.S. Olympian Emily Infeld has trusted real milk to fuel her journey.

U.S. Olympian Emily Infeld Runs on Milk
U.S. Olympian and Cleveland native Emily Infeld runs on milk to fuel her training routine.

Milk has the Nutrition Athletes Need
With 9 essential nutrients and 8 grams of protein, milk fuels U.S. Olympian Emily Infeld's training.

DAIRY'S ESSENTIAL ROLE





**We're all in
this together.**

*Dairy farmers continue
to work hard to keep
our families nourished.*







THANK YOU



Scott Higgins
CEO & President