

The background of the slide is a light gray gradient with several realistic water droplets of various sizes scattered across it. The droplets have highlights and shadows, giving them a three-dimensional appearance. The main title is centered in a large, bold, black sans-serif font.

TASK FORCE FOR THE REVITALIZATION OF VERMONT'S DAIRY INDUSTRY

INFORMATION FROM THE VERMONT AGENCY OF AGRICULTURE, FOOD
AND MARKETS

JUNE 7, 2021

INFORMATION FROM AGENCY OF AG, FOOD & MARKETS

- INTRODUCTION OF AGENCY STAFF
- INFORMATION REQUESTED BY THE TASK FORCE
- UPDATE THE TASK FORCE ON STATUS OF THE VERMONT DAIRY INDUSTRY:
 - COMPARE 2000, 2010, PRESENT
 - NUMBER OF FARMS BY FARM SIZE AND NUMBER OF FARMS
- FARMS PARTICIPATING IN THE FEDERAL ORDER AND THOSE THAT ARE NOT PARTICIPATING IN THE ORDER
 - IDENTIFY DIFFERENT NUMBERS AND TYPES OF NON-POOL PRODUCERS – RAW MILK FARMS, ON-FARM CHEESE, OTHER MANUFACTURE, AND FLUID MILK PRODUCES
- NUMBER OF COWS IN THE STATE
 - AMOUNT OF PRODUCTION, TOTAL, AVERAGE PER FARM, PER COW
 - IDENTIFY PRIMARY PLANTS WHERE MILK IS BEING SHIPPED TO OR USED IN VERMONT AS WELL AS THE MANY SMALLER PLANTS REFERRED TO IN THE DRF REPORT
 - TOTAL CAPACITY OF IN-STATE PLANTS
 - TOTAL USE OF VT RAW MILK USED BY THE PLANTS; AND
 - MUCH MILK IS BEING IMPORTED INTO VERMONT TO THESE PLANTS FROM OTHER STATES. IS THE MILK FROM OUT OF STATE JUST FROM NY OR OTHER STATES?

INFORMATION FROM AGENCY OF AG, FOOD & MARKETS

- NUMBER OF FARMS BY FARM SIZE AND NUMBER OF FARMS
- MFO PERMITS DID NOT EXIST IN 2000 – ESTIMATES OF MFO AND SFO NUMBER OF COW DAIRIES FROM USDA
- IN 2017 – CERTIFIED SFO PROGRAM BEGAN – CERTIFIED SFO 50 TO 200 COWS

	LFO – over 700	MFO – 200 – 699	SFO –under 200	Ave./year
2000	7	Permit did not exist – USDA estimate 217	Permit did not exist – USDA estimate -1,345	1,569
2010	18	148	830	996
2020	35	100	198 CSFO – 501	636

INFORMATION FROM AGENCY OF AG, FOOD & MARKETS

- FARMS PARTICIPATING IN THE FEDERAL ORDER AND THOSE THAT ARE NOT PARTICIPATING IN THE ORDER
 - IDENTIFY DIFFERENT NUMBERS AND TYPES OF NON-POOL PRODUCERS – RAW MILK FARMS, ON-FARM CHEESE, OTHER MANUFACTURE, AND FLUID MILK PRODUCES
 - SOURCES – FEDERAL MILK MARKETING ADMINISTRATION FOR ORDER #1 AND DAIRY SECTION FARM COUNT
 - AGENCY DOES NOT HAVE RECORDS FOR 2000 OR 2010 FOR THIS REQUEST RAW MILK FARMS, ON-FARM CHEESE, OTHER MANUFACTURE AND FLUID MILK
 - IN 2020 THERE WERE 71 (13 RAW MILK OR 58 ON FARM PROCESSORS)

Year	# of VT Dairy Farms Pooled in FMMO #1	# of VT Dairy Farms Dairy Section Count	Difference
2000	1,549	1,569	20
2010	978	1,037	59
2020	537	636	99

INFORMATION FROM AGENCY OF AG, FOOD & MARKETS

- NUMBER OF COWS IN THE STATE
- AMOUNT OF PRODUCTION, TOTAL, AVERAGE PER FARM, PER COW
- SOURCE USDA FOR COW NUMBERS AND MILK POUNDS
- SOURCE DAIRY SECTION COUNT FOR NUMBER OF FARM
- CALCULATION FOR MILK PER FARM, MILK PER COW AND COWS PER FARM

Year	USDA Cow #	USDA Total Milk – lb.	Dairy Section # of Farms	Milk/farm ave.	Milk/cow ave.	Cow/farm
2000	159,417	2,788,000,000	1,569	1,776,928	17,489	102
2010	136,667	2,520,000,000	1,037	2,430,087	18,439	132
2020	119,667	2,602,000,000	636	7,168,044	21,474	188

• INFORMATION FROM AGENCY OF AG, FOOD & MARKETS

- VERMONT PROCESSING FACILITIES BY SIZE
- PROCESSING POUNDS PER DAY AS INDICATED BY HANDLERS LICENSE APPLICATION

Processor	500 lbs or less	500 - 10,000 lbs	10,000 - 50,000 lbs	50,000 - 100,000 lbs	100,000 - 500,000 lbs	Over 500,000 lbs
# of processors	82	42	11	3	4	6

INFORMATION FROM AGENCY OF AG, FOOD & MARKETS

- VERMONT PROCESSORS – LESS THAN 500 POUNDS PER DAY

AHFC, LLC	LARSON CREAMERY, LLC
ALPINE GLO FARM, LLC.	LAZY LADY FARM, LLC.
ANIMAL FARM	LIVE WATER DAIRY
ARK OF SAFETY LLC D/B/A SWEET COW YOGURT	LONDONDERRY FARM LLC
BARN FIRST CREAMERY	LONDONDERRY VILLAGE MARKET, LLC
BERLE FARM	LULU HARMACK, LLC
BERWAY FARM PARTNERSHIP DBA BERWAY FARM CREAMERY	MAPLEBROOK MOZZARELLA LLC MAPLEBROOK ON THE MOVE, DBA MAPLEBROOK FARM
BIG CONES, LLC	MILLER MILK LLC
BIG PICTURE FARM	MO SE FARM
BONNIEVIEW FARM	NORTHWOODS CREAMERY
CATE HILL ORCHARD	NORTHERN SPY FARM
CELLARS AT JASPER HILL	ONE DROP, LLC.
CHAMBERS FARM LLC	ORB WEAVER CREAMERY LLC
CHAMPLAIN VALLEY CREAMERY, LTD	PAISLEY SCOOPS
CHILL	PLYMOUTH ARTISAN CHEESE, LLC
COBB HILL CHEESE, LLP	PUMPKIN VILLAGE FOODS, LLC.
CREEK VALLEY FARM LLC	RAY OF SUNSHINE BAKERY
CROOKED MILE CHEESE	RICHMOND MARKET BEVERAGE
CVD INC	ROBERTSHAW FARM
DAIRY ON THE MOOVE	ROISIN DUBH FARM DBA BLACK ROSE CREAMERY
DOES LEAP FARM	SAGE FARM, LLC

INFORMATION FROM AGENCY OF AG, FOOD & MARKETS

- VERMONT PROCESSORS – 500 POUNDS OR LESS - CONTINUED

DOLCETTI	SCOUT & CO.
FARM & WILDERNESS FOUNDATION	SCOUT'S HONOR CREAMERY LLC
FAT SHEEP FARM & CABINS LLC	SHELBURNE MARKET
FOOD CONNECTS	SHELBURNE SUGARWORKS LLC
FREEDOM FOODS	SPOONWOOD CABIN, LLC.
FRIENDS OF HILDENE, INC.	STICKY FINGERS BAKERY
FWR DBA GRASSROOTS VERMONT	STONY POND FARM
GAMMEL GARDEN	SUNSET ROCK FARM
GREEN MOUNTAIN BLUE CHEESE	SWEET DOE DAIRY LLC
HAPPY BIRD POULTRY FARM, LLC.	THE DAIRY STOP
HIGH POND GOAT FARM	THREE SHEPHERDS FARM
HILLSIDE CREAMERY	VERMONT PATIENTS ALLIANCE
HONIG DAIRY GOAT FARM LLC DBA DOVER HILL CREAMERY	VERMONT SHEPHERD
ICE HOUSE FARM	VILLAGE MARKET OF WATERBURY
JERICO MARKET	VILLA VILLEKULA FARM LLC
JERSEY GIRLS DAIRY	WALLINGFORD LOCKER
JOHNSON STERLING MARKET	WOODCOCK FARM CHEESE CO.,INC.
JULIANA DANYEW	YOGURT CITY – MIDDLEBURY
KARIM FARM & CREAMERY	YOGURT CITY OF MAPLE TREE, INC.
KIDDER'S SMOKE AND CURE	KISS THE COW FARM

INFORMATION FROM AGENCY OF AG, FOOD & MARKETS

- VERMONT PROCESSORS – 500 TO 10,000 POUNDS PER DAY

BEN AND JERRYS- ST.ALBANS	MOUNTAIN MOZZARELLA DBA MAPLEBROOK FARM 2ND LOCATION
BEN AND JERRY'S-WATERBURY	MT MANSFIELD CREAMERY
BILLINGS FARM & MUSEUM	NEIGHBORLY FARMS OF VERMONT LLC
BLUE LEDGE FARM	NORTH MEADOW FARM LLC
BOSTON POST DAIRY, LLC	NORWICH FARM CREAMERY, LLC.
BOUSQUET SMOKE HOUSE LLC	PARISH HILL CREAMERY
BRIDGMAN HILL FARM	PLOUGHGATE CREAMERY
BUTTERWORKS FARM	RHINO FOODS, INC
CELLARS AT JASPER HILL -VENTURE CENTER	ROGERS FARMSTEAD
CONSIDER BARDWELL FARM	SHADAGEE FARM
CRAWFORD FAMILY FARM, LLC	SHELBURNE FARMS, INC
CRESCENT CREAMERY, INC.	SPRAGUE'S DAIRY, INC.
CROWLEY CHEESE, LLC	STRAFFORD ORGANIC CREAMERY
DAKIN FARM, INC.	SWEET ROWEN FARM
GRAFTON VILLAGE CHEESE CO.-BRATTLEBORO	THE PUTNEY SCHOOL
FAIRY TALE FARM	THE VERMONT GELATO CO.
FAT TOAD FARM	TWIG FARM
JACQUES AND ROBERTA ROYER	VERMONT FARMSTEAD CHEESE CO. -WINDSOR
JASPER HILL FARM	VERMONT'S ORIGINAL ICE CREAM, INC.
KINGDOM CREAMERY OF VERMONT, LLC.	VON TRAPP FARMSTEAD
MANSFIELD DAIRY INC.	WEST RIVER CREAMERY

INFORMATION FROM AGENCY OF AG, FOOD & MARKETS

- VERMONT PROCESSORS – 10,000 TO 50,000 POUNDS PER DAY

BRIDPORT CREAMERY, LLC

FIVE GENERATION FARMSTEAD CREAMERY LLC

GRAFTON VILLAGE CHEESE CO. - GRAFTON

GREEN MOUNTAIN ORGANIC CREAMERY

MOUNTAIN MOZZARELLA, LLC. DBA MAPLEBROOK FARM

OAK KNOLL DAIRY, LLC

PBM NUTRITIONALS, LLC, A PERRIGO COMPANY

SCHOLTEN FAMILY FARM

SPRING BROOK FARM CHEESE LLC

VERMONT CREAMERY

VERMONT FARMSTEAD CHEESE CO.

INFORMATION FROM AGENCY OF AG, FOOD & MARKETS

- VERMONT PROCESSORS – 50,000 TO 100,000 POUNDS PER DAY

HP HOOD, LLC.

MONUMENT FARMS, INC.

MOUNTAIN MILK, INC.

INFORMATION FROM AGENCY OF AG, FOOD & MARKETS

- VERMONT PROCESSORS – 100,000 TO 500,000 POUNDS PER DAY

AGRI-MARK, INC. - DISTRIBUTION CENTER

CABOT CREAMERY/ AGRI-MARK FARRELL STORAGE

COMMONWEALTH DAIRY, LLC.

HP HOOD-BOOTH BROTHERS

INFORMATION FROM AGENCY OF AG, FOOD & MARKETS

- VERMONT PROCESSORS – OVER 500,000 POUNDS PER DAY

AGRI-MARK, INC.

CABOT CREAMERY, INC/AGRIMARK CABOT

CABOT CREAMERY/AGRIMARK MIDDLEBURY

FRANKLIN FOODS, INC.

LAND O' LAKES, INC.

DFA - ST. ALBANS -PLANT

INFORMATION FROM AGENCY OF AG, FOOD & MARKETS

- VERMONT MILK DIRECT FROM THE FARM TO PROCESSOR – DOES NOT INCLUDE CREAM, SKIM MILK AND OR CONDENSED SKIM MILK – BY STATE – SPRING DATA FOR 2006, 207, 2016, 2017 AND 2020

Spring											
State	2006 pounds	2006 Percent	2007 pounds	2007 percent	2016 pounds	2016 percent	2017 pounds	2017 percent	2020 pounds	2020 percent	
CT	8,622,758	4.02%	6,313,743	2.93%	11,734,360	5.34%	7,872,333	3.16%	7,025,709	3.19%	
MA	62,041,625	28.90%	67,823,265	31.48%	47,420,057	21.56%	60,248,868	24.18%	49,889,604	22.62%	
ME	2,379,786	1.11%	1,551,526	0.72%	0	0.00%	0	0.00%	0	0.00%	
NH	5,223,869	2.43%	11,343,122	5.26%	11,718,784	5.33%	14,278,710	5.73%	14,255,535	6.46%	
NY	6,145,393	2.86%	10,216,394	4.74%	14,222,826	6.47%	14,493,040	5.82%	5,605,816	2.54%	
RI	126,031	0.06%	61,424	0.03%	0	0.00%	0	0.00%	0	0.00%	
VT	130,131,688	60.62%	126,406,486	58.66%	134,743,543	61.27%	152,161,759	61.07%	135,863,740	61.60%	
NJ	0	0.00%	0	0.00%	0	0.00%	0	0.00%	24,317	0.01%	
dump	0	0.00%	167,137	0.08%	87,160	0.04%	118,343	0.05%	7,893,522	3.58%	
	214,671,150	100.00%	215,478,606	100.00%	219,926,730	100.00%	249,173,053	100.00%	220,558,243	100.00%	

INFORMATION FROM AGENCY OF AG, FOOD & MARKETS

- VERMONT MILK DIRECT FROM THE FARM TO PROCESSOR – BY POTENTIAL PRODUCT – SPRING
2006, 2007, 2016, 2017 AND 2020 – NOT EXCLUSIVE TO INSTATE PROCESSORS

Spring	2006		2007		2016		2017		2020	
TOTAL BY PRODUCT	2006 pounds	Percent	2007 pounds	percent	2016 pounds	percent	2017 pounds	percent	2020 pounds	percent
butter/powder	6,883,709	3.21%	4,754,602	2.21%	7,835,823	3.56%	8,919,439	3.58%	13,067,646	5.92%
cheese	44,945,970	20.94%	58,716,549	27.25%	38,135,557	17.34%	53,083,994	21.30%	48,069,800	21.79%
cheese and cultured	30,747,078	14.32%	20,215,537	9.38%	33,562,151	15.26%	29,542,953	11.86%	24,014,495	10.89%
cream cheese	0	0.00%	0	0.00%	4,242,221	1.93%	5,208,464	2.09%	2,299,576	1.04%
fluid	78,869,429	36.74%	94,419,364	43.82%	76,176,572	34.64%	82,684,082	33.18%	64,700,696	29.33%
ice cream	2,772,669	1.29%	101,231	0.05%		0.00%	19,417	0.01%	705,644	0.32%
skim, skim condense. Cream	48,083,573	22.40%	42,603,286	19.77%	44,633,046	20.29%	49,659,052	19.93%	46,441,765	21.06%
yogurt	2,368,722	1.10%	2,905,391	1.35%	15,250,455	6.93%	19,937,309	8.00%	13,365,099	6.06%
dumped	0	0.00%	167,137	0.08%	87,160	0.04%	118,343	0.05%	7,893,522	3.58%
total	214,671,150	100.00%	215,478,607	100.00%	219,922,985	100.00%	249,173,053	100.00%	220,558,243	100.00%
# of companies represented	25		29		23		28		26	

INFORMATION FROM AGENCY OF AG, FOOD & MARKETS

- HOW MUCH MILK IS BEING IMPORTED INTO VERMONT TO THESE PLANTS FROM OTHER STATES. IS THE MILK FROM OUT OF STATE JUST FROM NY OR OTHER STATES?
- AGENCY OF AGRICULTURE DOES NOT HAVE ACCESS TO THIS DATA.

STRATEGIES TO SUPPORT THE DAIRY SECTOR

- DECREASE COST OF PRODUCTION
 - CLEVELAND FARM (80 COW CONVENTIONAL) SAVED \$34,000 IN FEED COSTS OVER 25 WEEKS BY TRANSITIONING TO INTENSIVELY-MANAGED GRAZING
- INCREASE VALUE OF MILK PRODUCED
 - ALL CO-OPS PAY MORE FOR QUALITY AND HIGHER COMPONENTS
 - CONVENTIONAL FARMS WHO SHIP DIRECTLY TO A CHEESEMAKER REPORT AN AVERAGE PAY POINT OF \$30 PER HUNDREDWEIGHT
- BUILD CONSUMPTION AND CONSUMER PREFERENCES
 - SMALL PROJECTS CAN INCREASE BRAND VALUE EXPONENTIALLY – INCREASING SALES AND CONSUMER CONNECTION TO PRODUCTS

INFORMATION FROM AGENCY OF AG, FOOD & MARKETS

- QUESTIONS AND ANSWERS