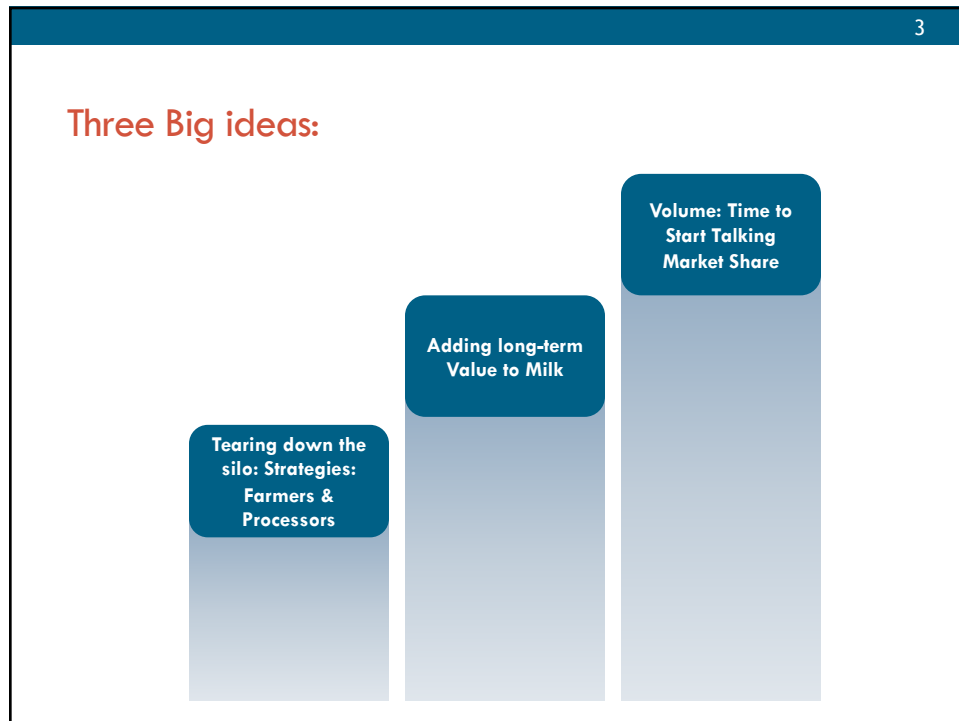


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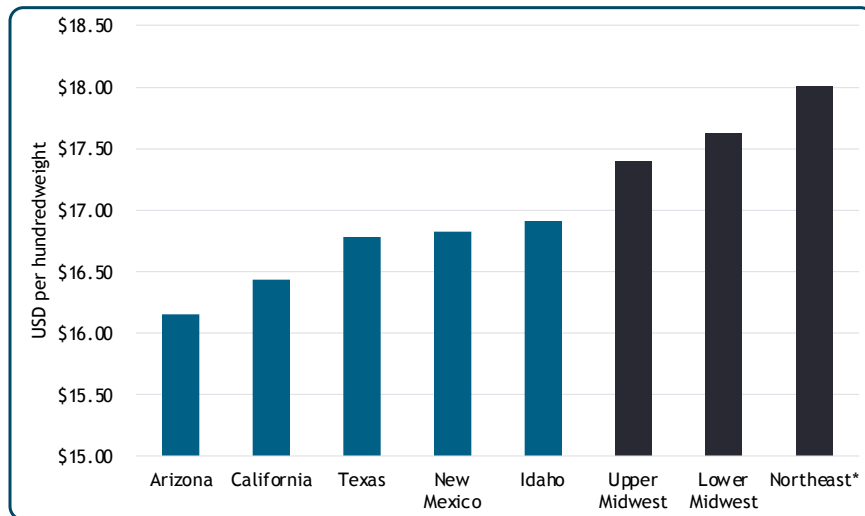
**BIG IDEA 1: TEARING DOWN THE SILO.**

**SHARING STRATEGIES: FARMERS & PROCESSORS**

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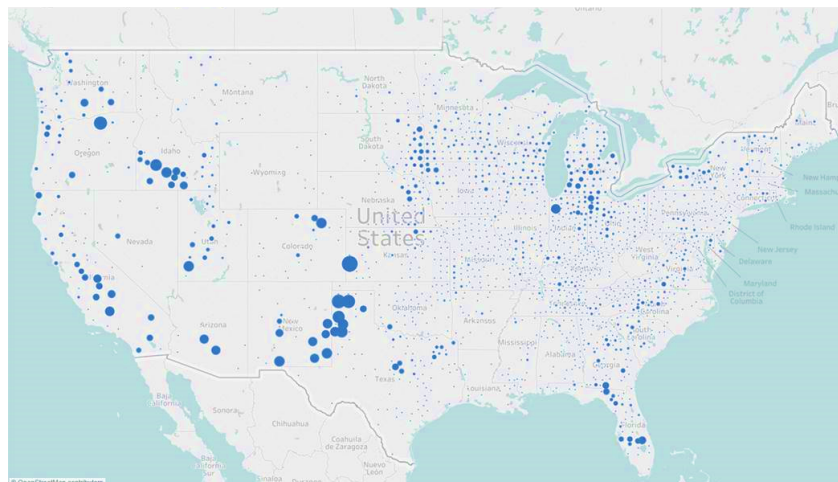
## Average Cost of Production



Sources: Genske, Mulder & Company, Dehm Associates

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## Average Size Farm by County



Source: 2017 Agricultural Census, Dairy & Food Market Analyst Estimates

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## BIG IDEA 2: ADDING LONG-TERM VALUE TO MILK

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What does pursuing “value” actually look like





## OTHER WAYS OF PURSUING VALUE

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### Increasing the value of cull cows

Rich, intense steaks from older, 'mature' cows

L.A. Times : 05 April 2019



"WEIRD, WE ONLY EAT YOUNG ANGUS, THAT'S SO BORING, IT'S LIKE ONLY EVER HAVING ONE TYPE OF WINE OR BEER." -GEMGO

Sources: Los Angeles Times, Holstein Association USA, GEMGO

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## List of emerging consumer issues in the U.S.

### Animal Care:

- Polled Genetics
- Pain Mitigation/Management
- Housing (tie stalls)
- Cow-Calf Separation
- Animal Abuse

### Antibiotic Use

- Reduction of Use
- Antibiotic Resistance
- Responsible Use

### Environment:

- Tracking of Greenhouse Gas Emissions
- Water Conservation
- Nutrient Management

### Workforce Development:

- Training and Supervision
- Management
- Labor
- Employee Deaths

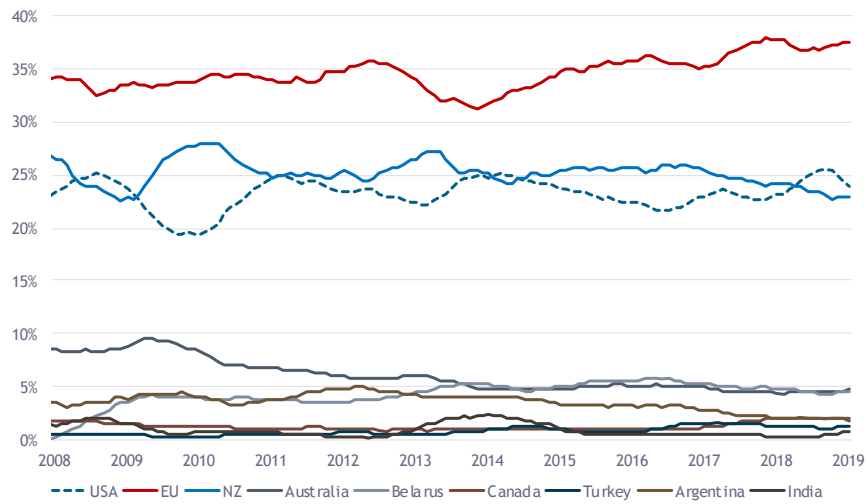
Source: National Milk Producers Federation

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**PURSuing VOLUME:  
TIME TO START TALKING ABOUT  
MARKET SHARE AND STOP  
TALKING ABOUT PERCENTAGE  
EXPORTED**

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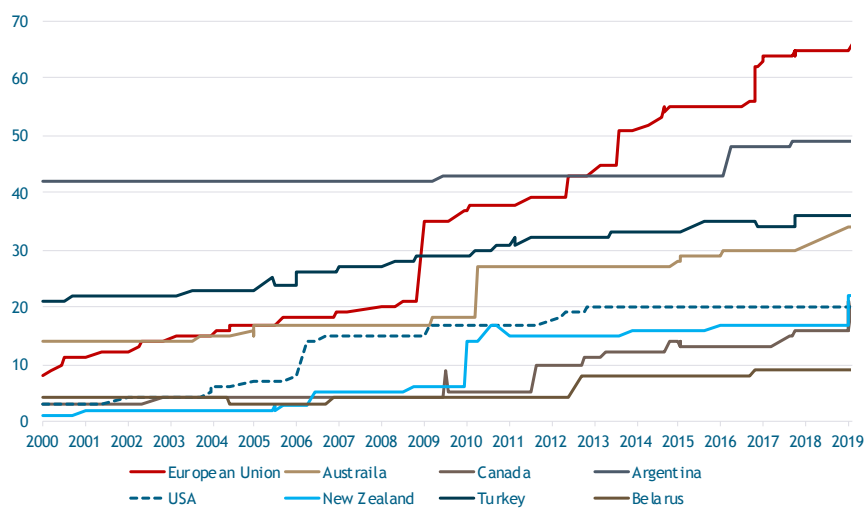
## Share of globally traded non-fat dairy solids



Source: GTIS, Dairy & Food Market Analyst

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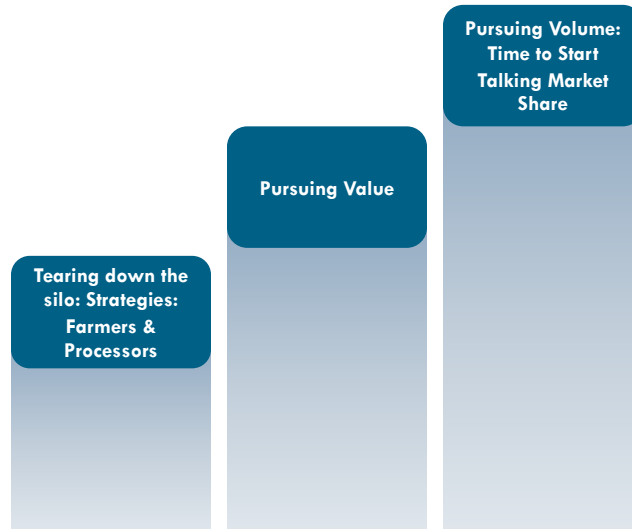
## Number of Trade Agreements (with other countries)



Sources: World Trade Organization, Dairy & Food Market Analyst

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### Three Big ideas:



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Thank you!

By Matt Gould, Dairy & Food Market Analyst

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