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### Dairy West Statistics (as of 2017)

	Idaho	Utah	Together
Dairy Operations	457	180	637
Milk Cows	592,000	95,000	687,000
Average Herd Size	1,295	528	1,078
Milk Production (annually)	14.6 billion lbs.	2.2 billion lbs.	16.8 billion lbs.
U.S. Rank (production)	4 <sup>th</sup>	21 <sup>st</sup>	-
Processing Plants	24	12	36
Dairy Exports	\$466 million	\$64 million	\$530 million
Local Economic Impact (from exports)	\$1.24 billion	\$183 million	\$1.42 billion
Direct Jobs	8,010	9,632	17,642
Indirect Jobs (additional)	33,654	21,340	54,994
Consumer Population	1.7 million	3.1 million	4.8 million

Source: National Agricultural Statistics Service; U.S. Dairy Export Council; National Milk Producers Federation; International Dairy Foods Association.

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DAIRY TOURS

Don't just tell me.  
**SHOW ME.**

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## COMMUNITY TOURS

### PERCENTAGE OF TOUR GUESTS WHO HAVE NEVER BEEN ON A FARM

57%

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**UNIVERSITY TOURS**

**PERCENTAGE OF TOUR GUESTS**

**WHO HAVE NEVER BEEN ON A FARM**

**56%**

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**How students' perceptions changed:**

● Improved ● Unchanged ● Declined

Category	Improved	Unchanged	Declined
How dairy farmers care for their cows	60%	38%	2%
How dairy farmers care for the environment	70%	30%	0%
Quality and safety of milk products	65%	35%	0%
Overall opinion of dairy farming	71%	28%	1%

**The top items students planned to pass on:**

- How well the cows are cared for
- The cleanliness and safety precautions used
- How selfless dairy farmers are




**What was most surprising to the students?**

- How much milk is produced in a day
- The milking process
- The myths around antibiotics and hormones

*"Farms are very computerized. They use a lot of research and technology."*

*"It was a lot of education to be a farmer."*

*"A farmer's #1 goal is happy cows!"*



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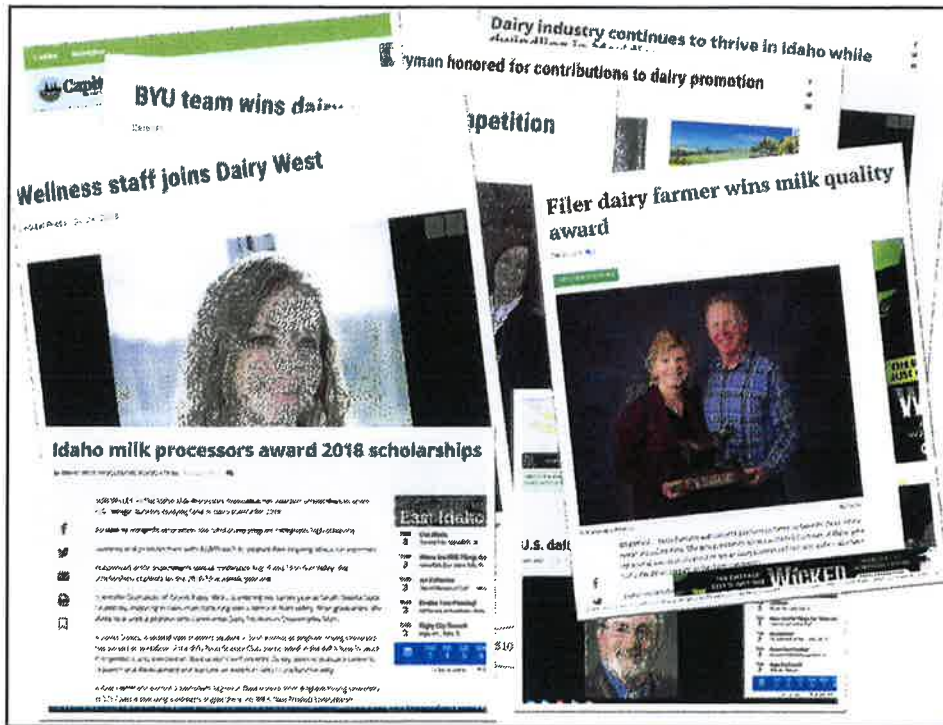
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## **MEDIA RELATIONS**

IT ONLY TAKES ONE NEGATIVE STORY TO ERASE 10 "ATTA-BOYS."

THAT'S WHY WE PUT MORE  
ATTA-BOYS IN  
THE BANK.

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## HEALTH & WELLNESS

<div style="background-color: #3498db; padding: 10px; color: white;"> <p><b>SPORTS NUTRITION</b></p> <p>IHSAA/UHSAA Refuel/Replenish              School Athletic Relationships              Sports Symposium              University Sports              FUTP60 (Grow Sports Nutrition)</p> </div>	<div style="background-color: #27ae60; padding: 10px; color: white;"> <p><b>FARM TO TABLE</b></p> <p>Farm to School              School Foodservice              Culinary Strategy              Ag Partners (FFA, AITC, 4H)</p> </div>
<div style="background-color: #2980b9; padding: 10px; color: white;"> <p><b>YOUTH WELLNESS</b></p> <p>FUTP60              School Leader Relationships              AHFK/HEAL              School Teachers Relationships              Curriculum</p> </div>	<div style="background-color: #f39c12; padding: 10px; color: white;"> <p><b>HEALTH PROFESSIONALS</b></p> <p>Continuing Education Events              Medical Prof Relationships              University Nutrition Progs              Public Health</p> </div>

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## INNOVATION PARTNERSHIPS

ATTRACTING NEW PROCESSORS

WORKING WITH RESTAURANTS AND FOOD SERVICE

SUPPORTING COMMERCIAL PARTNERS WITH INFORMATION AND RESOURCES

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### Select USA Conference (June 2018)

- Dairy West
- IDA
- Dept of Commerce
- SEIDO
- Governor's Office



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**Smoky Mountain Pizza**

- Monthly dairy promotions
- Dairy usage up 2.1% annually
- Supporting Dairy West events with over \$14k in product



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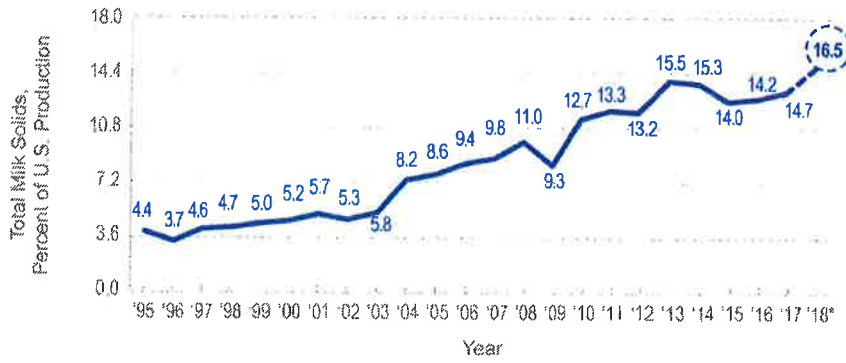
**Trade Missions with ISDA and USDEC**



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## Exports as a Percent of Production



\*Through the first four months of 2018 Source, U.S. Dairy Export Council, USDA.

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## U.S. Exports as a Percent of Production

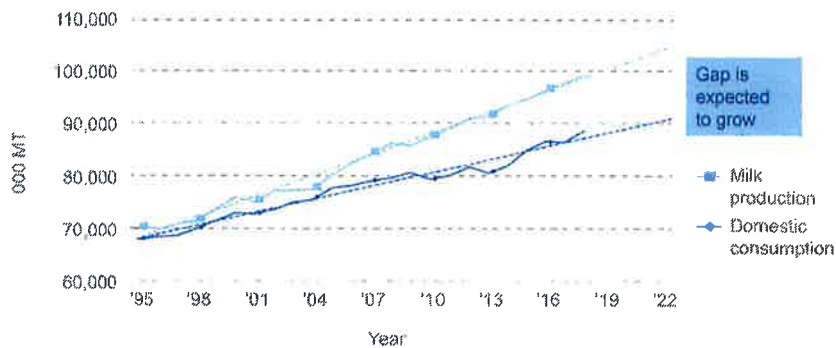
	2017	2018 thru Oct
<b>Whey Protein</b>	66%	72%
<b>NDM/SMP</b>	57%	70%
<b>Dry whey</b>	45%	49%
<b>Cheese</b>	5.9%	6.0%
<b>Butterfat</b>	3.3%	3.2%

Source: USDEC, USDA, U.S. Bureau of Census

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# The Next 5% is Vital to Our Future

## U.S. Milk Production and Domestic Consumption



Source: USDEC, USDA

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Exports can close the gap— 95% of our customers live outside of the US.



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### 2019 KEY AREAS OF FOCUS

CONTINUE TO WORK TO ATTRACT MORE PROCESSING AND INTERNATIONAL OPPORTUNITIES

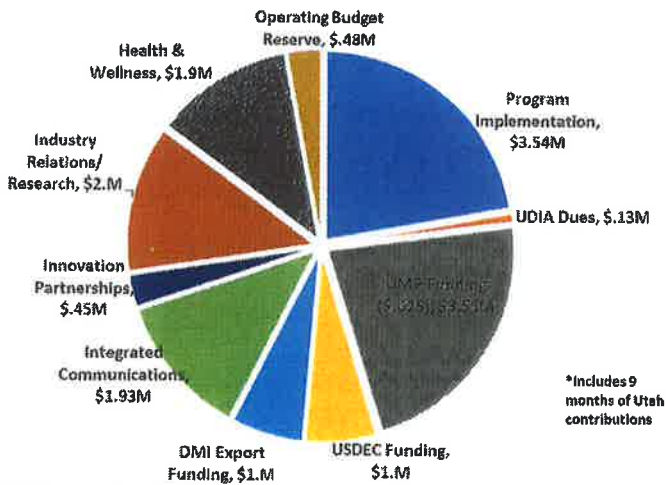
EXPANSION OF ZOOM TOURS FOR SCHOOLS  
(BRINGING THE FARM TO THE SCHOOLS)

MORE WORK WITH HEALTH PROFESSIONALS AND MEDICAL STUDENTS TO REINFORCE THE IMPORTANCE OF DAIRY IN THE DIET

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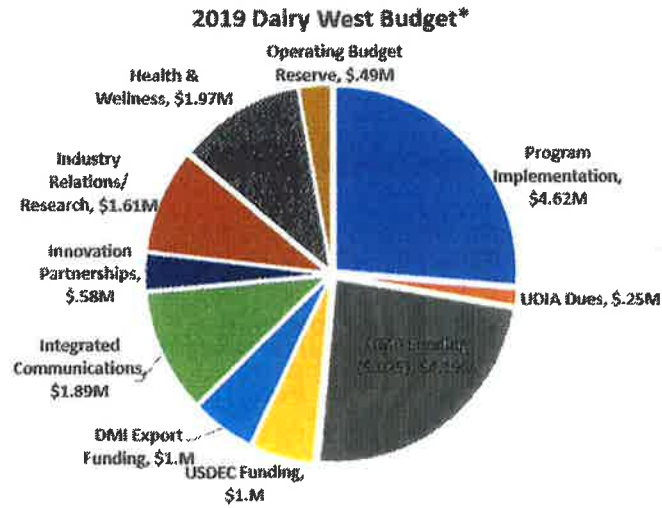
### Financial Reports

2018 Dairy West Budget\*



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## Financial Reports



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**THANK YOU!**

**KARIANNE FALLOW**

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DAIRY FARMERS OF IDAHO & UTAH

**dairy west**<sup>®</sup>

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