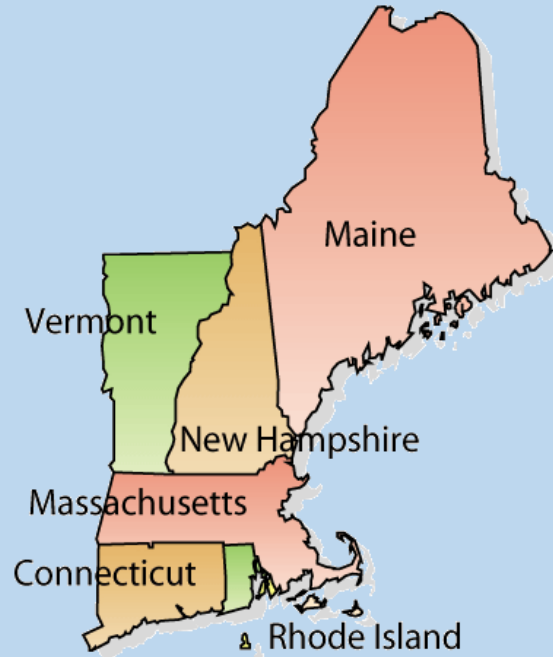


Trends and Tactics for Sustaining Dairies in New England: An Update



by Richard P. Horwitz
for the Annual Leadership Meeting of the
New England Veterinary Medical Association (NEVMA)
September 27, 2013 in Portland, Maine

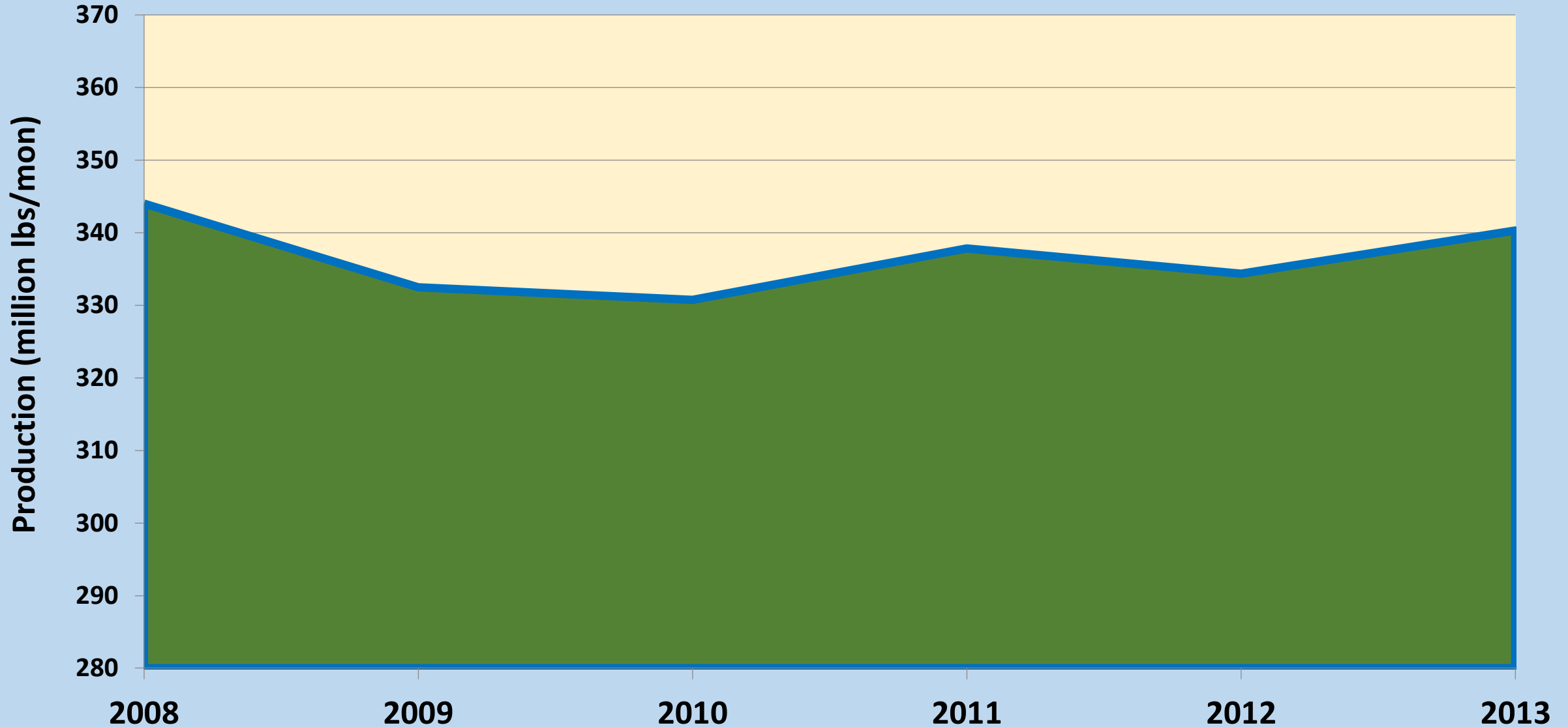
Agenda

- **Update on national SMS efforts**
- **Update overview of regional dairy industry**
 - Trends in Regional Dairy Production
 - Trends in Processing and Movement
 - Emerging Issues
- **Priorities in Old Business**
- **Suggest New Business**

Progress at the National Level

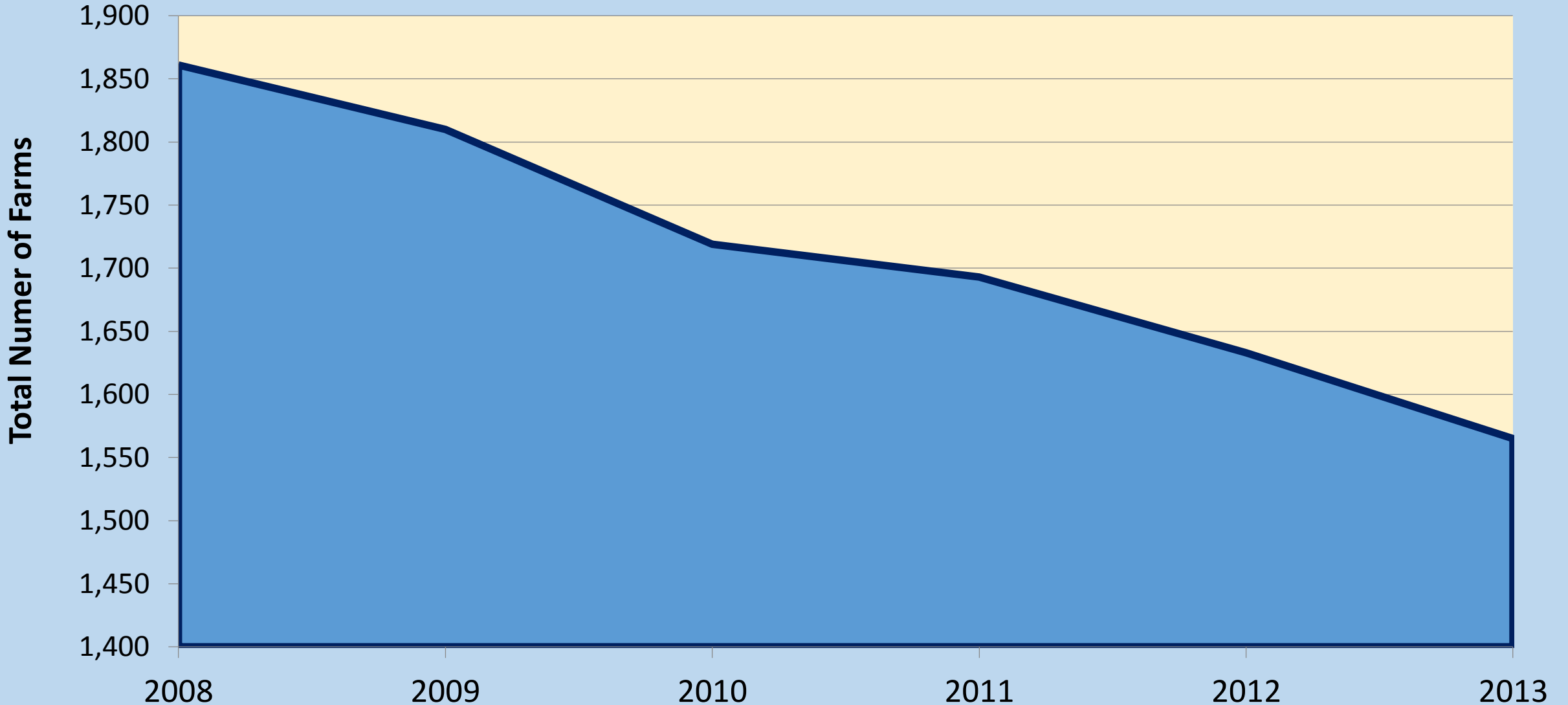
- **USDA/APHIS VS and NCAHEM survive and making progress**
- **DHS more engaged**
- **Major processors and marketing companies engaged**
- **NIAA Meeting with White Paper and FMD Symposium (Louisville, April 2013)**

Total Dairy Production in New England, 2008-13



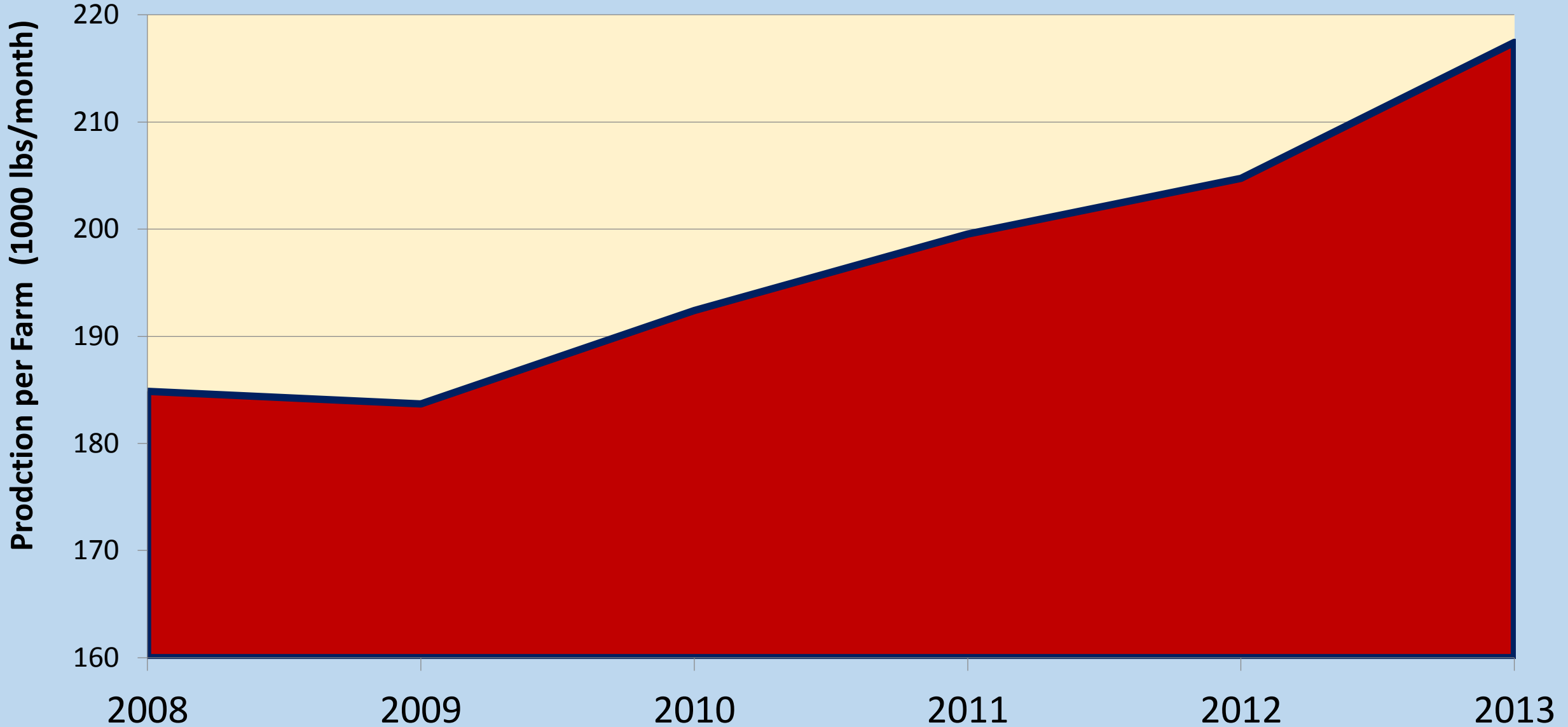
Source: NE Marketing Area, AMS, January Reports

Number of Dairy Farms in New England, 2008-13



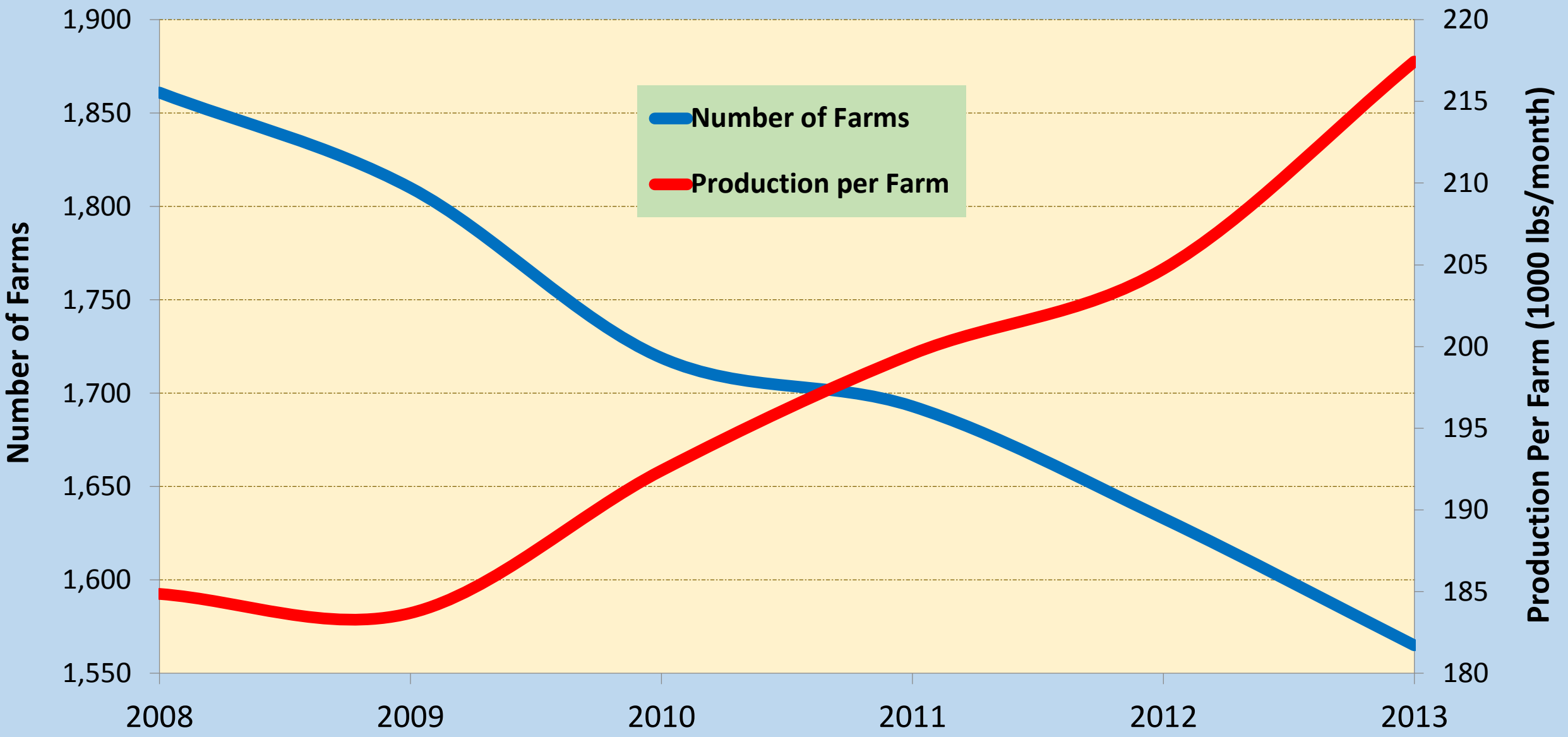
Source: NE Marketing Area, AMS, January Reports

Dairy Output Per Farm in New England, 2008-13



Source: NE Marketing Area, AMS, January Reports

Fewer, Larger Dairy Farms in New England, 2008-2013



Source: NE Marketing Area, AMS, January Reports

Farm Trends

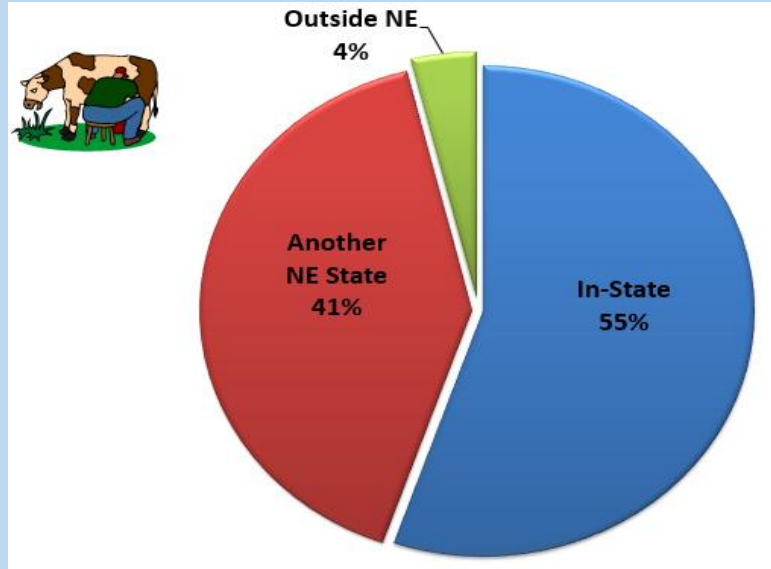
Over the past five years New England dairy farms:

- Have declined in number.
16% fewer farms
- Have increased in size.
18% more milk production per farm
- Together, produce about the same amount of milk.

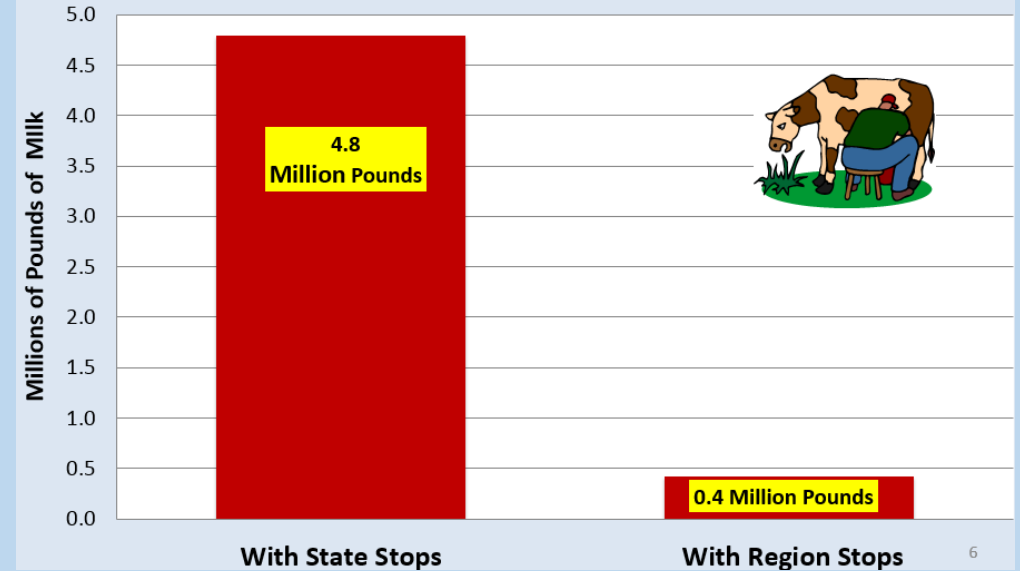
Source: USDA Agricultural Marketing Service, Northeast Marketing Area – Federal Order 1
Market Administrator's Monthly Statistical Reports, 2008-13.

Snapshot of Risks in Regional vs. State Control

Market for NE producers

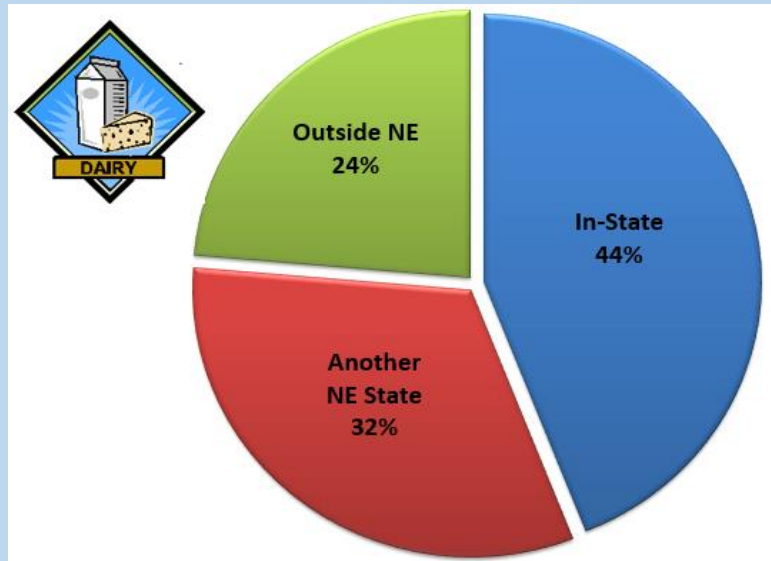


Potential waste generated on farms per day

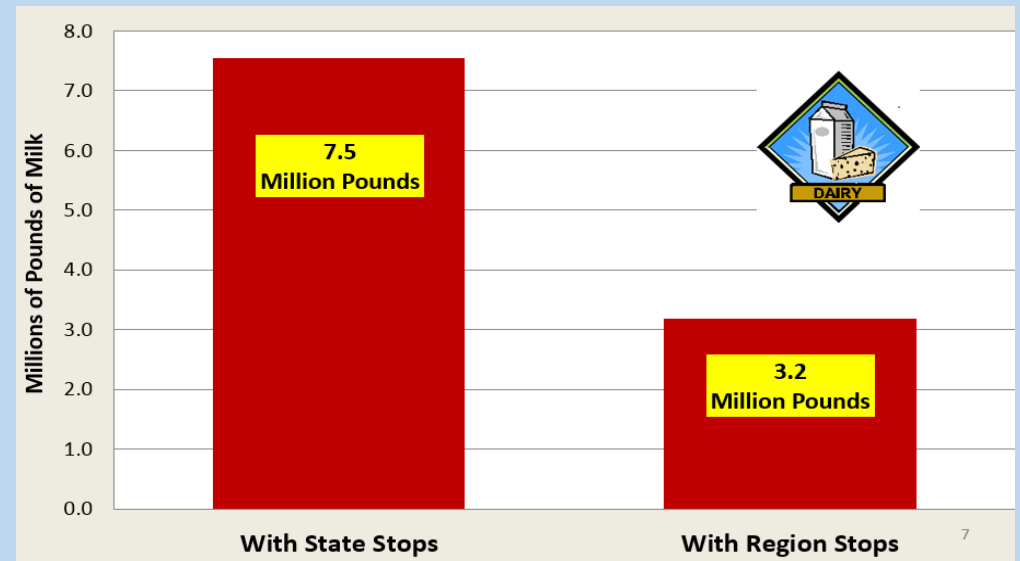


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Supply for NE processors

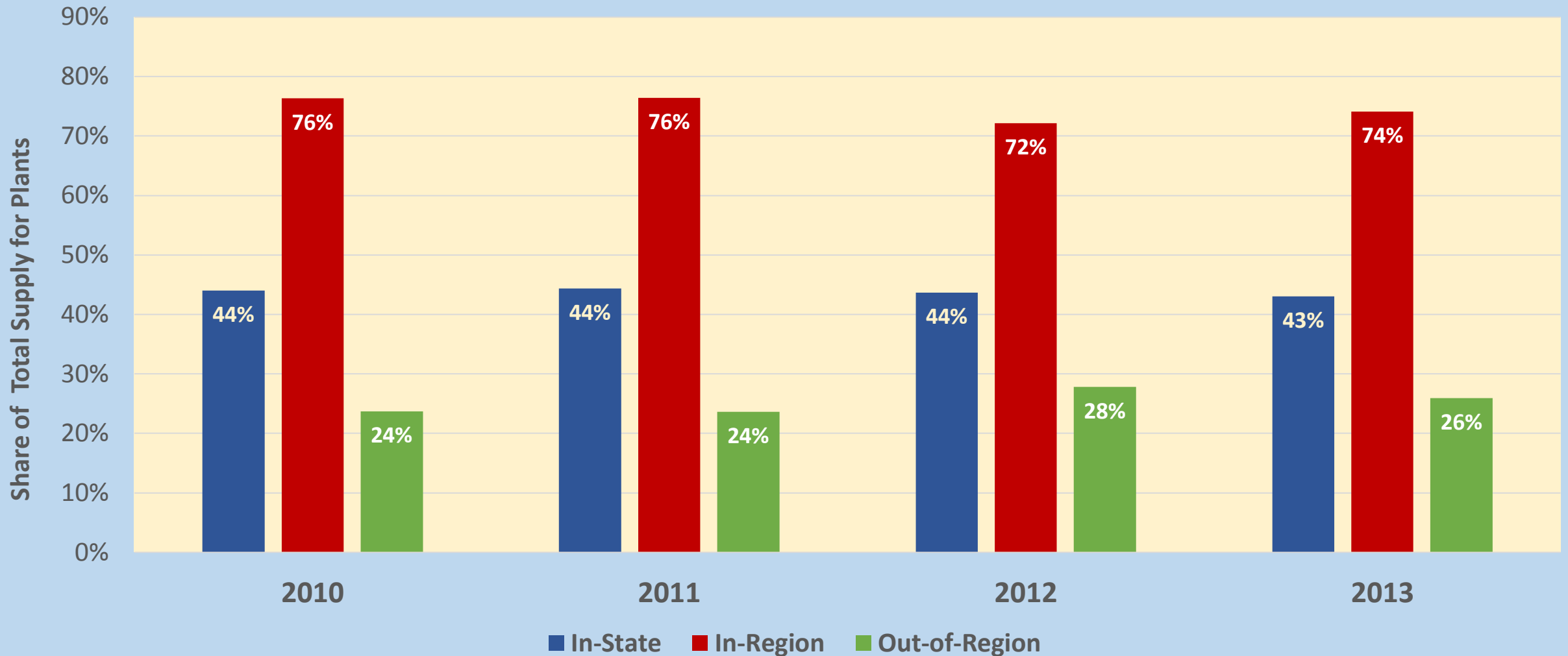


Potential daily supply loss for processors



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Supply for Regional Plants, 2010-2013



Work-in-Progress

- **Gaps identifiable in updated, higher resolution data**
 - **More specific impacts of inter-regional traffic**
 - **Dairy business NOT regulated by AMS**
- **Better analysis of range of C&D options**
- **Implications of better testing capability**
- **Implications of better vaccination capability**

NESAASA Priorities? – Readiness Review

- **Visit farms and enter data on Producers**
 - Delete dead or mistaken records
 - Improve Coverage
 - Institutionalize regular oversight by dairy or milk regulators
- **Survey Processors (mail out)**
- **Survey Haulers (mail out)**

Progress in Preparing to Permit Farm Pickup

	Number of Farms Surveyed so far (as of 9-9-2013)	Total # of Producers (NESAASA database)	% of <u>NESAASA</u> Count Surveyed So far	Total # of Producers (AMS database 1-2013)	% of <u>AMS</u> Count Surveyed So far
Connecticut	48	139	35%	117	41%
Maine	248	307	81%	294	84%
Massachusetts	118	170	69%	129	91%
New Hampshire	87	131	66%	114	76%
Rhode Island	18	18	100%	13	100%
Vermont	378	1065	35%	898	42%
New England	897	1830	49%	1565	57%

NESAASA Priorities? – Outreach Options

- **Maintain commitment in State government**
- **Engage producers**
- **Engage haulers**
- **Engage processors**
- **Engage New York producers and/or haulers**

Comments, Questions or Suggestions?



COASTAL
INSTITUTE

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