

GLOBAL DAIRY SYMPOSIUM

Madison, Wisconsin, U.S.A. | October 6, 2022

Hosted by: Wisconsin Department of Agriculture, Trade and Consumer Protection





A photograph of several black and white dairy cows in a barn. They are lined up at a metal trough, eating a brown, textured feed. Each cow has a yellow ear tag with a green dot. The background is slightly blurred, showing more cows and a blue sky.

U.S DAIRY INDUSTRY OUTLOOK: FARMER PERSPECTIVE

GLOBAL DAIRY SYMPOSIUM

OCTOBER 6, 2022



USDEC CHILE FARMER MISSION

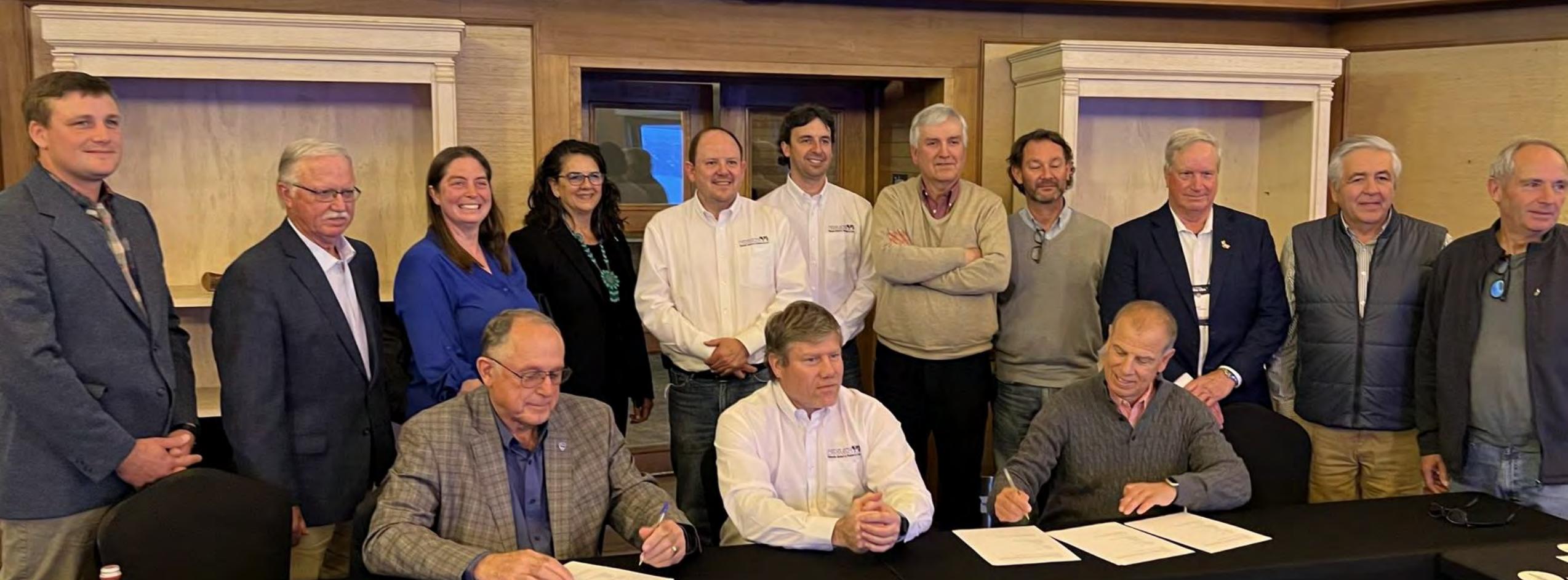
SEPTEMBER 2022



INFLUENCER EVENT

RETAIL TOUR
TRADE SHOW
COLUM
PLANT
INACP





MEMORANDUM OF UNDERSTANDING WITH CHILE

SAMA:

Proactive multilateral engagement to positively shape policies and market forces



Amplifying U.S Dairy's voice and defining benefits in global discussions and within the UN policy debate on sustainable food systems and nutrition



Harnessing international dairy orgs and other global partners to demonstrate U.S. Dairy leadership and drive positive outcomes



Building relationships with decision makers and thought leaders that will shape future policies, market forces & perception of U.S. Dairy

OPPORTUNITIES FOR U.S. DAIRY

**Increased
Cheese
Consumption**

**Growing
Demand for
Protein
Globally and
in the US**

**Lack of Milk
from Key
Competitors**

WHAT DOES THIS MEAN FOR THE U.S.?

- 🔹 **U.S. exports still the path to growth**
- 🔹 **Supply, particularly outside of the U.S., will be hard to find**
- 🔹 **Dairy fundamentals very strong for long-term demand growth**



THANK YOU

MARILYN HERSHEY





Global dairy trends and perspectives

Presented by:



Torsten Hemme

Founder and
CEO of IFCN

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GLOBAL DAIRY SYMPOSIUM

6th October 2022, World Dairy Expo; USA



Dairy world today

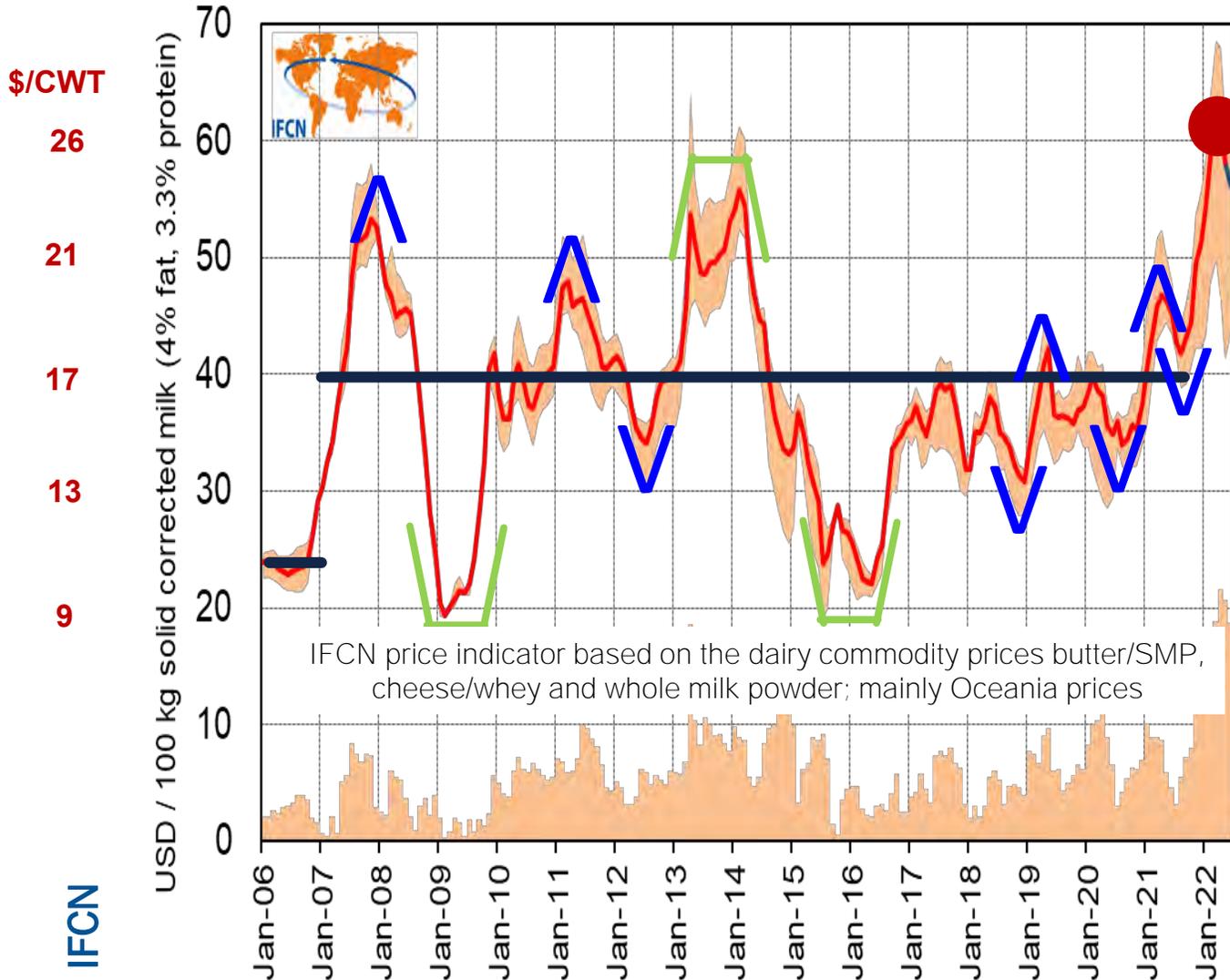
Farm economics

**Dairy
Outlook**



**Global dairy trends
and perspectives**

WORLD MILK PRICE, 2006 – SEPT 2022



Three price levels (simplified)
 until – 2006 – 25 \$/ 100 kg - **11 \$/CWT**
 2007 – 2021 – 40 \$/ 100 kg - **17 \$/CWT**
 2022 new record – > 60 \$/ 100 kg - **26 \$/CWT**

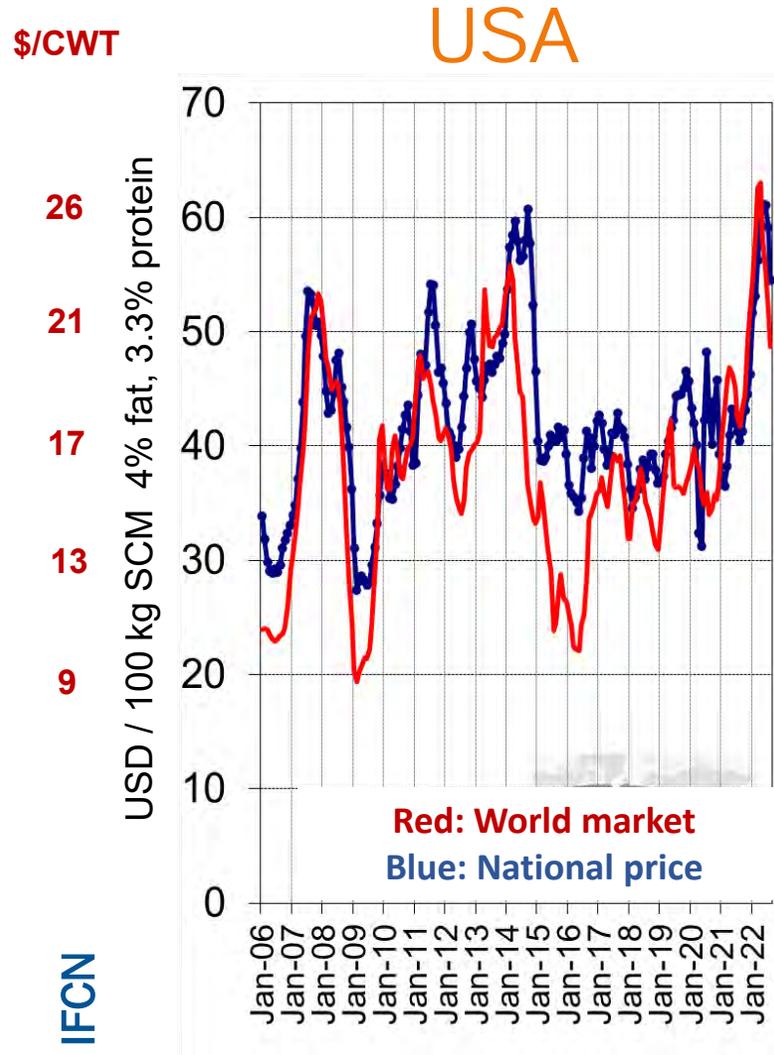
Patterns

Mostly we are in price cycles 3- 4 years
 Stability 2017 – 2021 an exception (5 years)
 More “V’s” than “U’s”

Drivers for

Prices = Milk supply and demand growth
 Volatility = Delay to react on prices change
 Cycles = Biology in the farming system

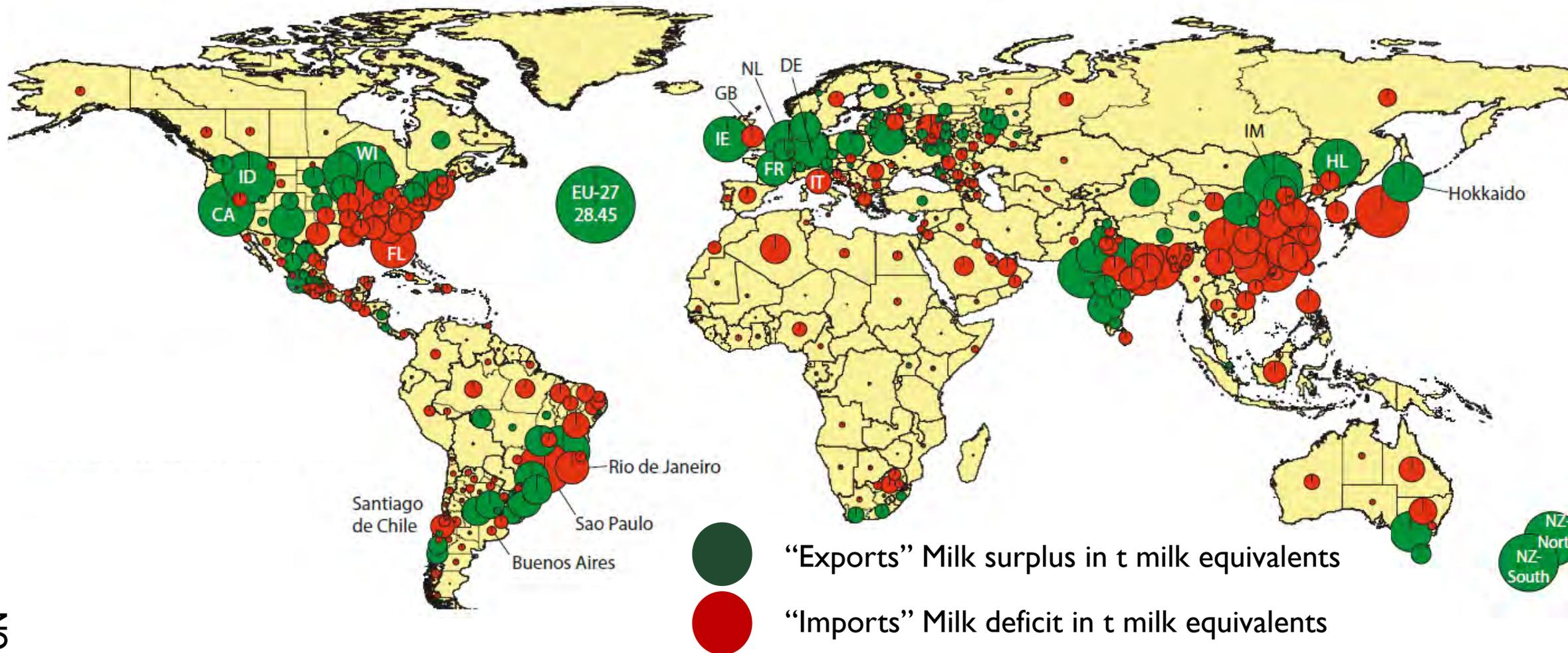
WORLD MILK PRICE DRIVES NATIONAL PRICES



Patterns

1. National prices follow the world price with a certain delay
2. Germany at 60 US\$/100 kg
France at 50 US\$ / 100 kg
3. In 2022 USA
Milk prices have increased faster than EU but prices peaked

MILK “SUPLUS & DEFICIT” 2020





IFCN
Dairy Data · Knowledge · Inspiration

DAIRY ALTERNATIVES ARE AGGRESSIVE

Superbowl 2021

30 sec slot - 5.5 mill US\$

Its like milk but
made for humans

No cows
No cows
No cows

Oatly

Dairy & the Story
Loose, Loose, Loose
(Animals, People, Planet)

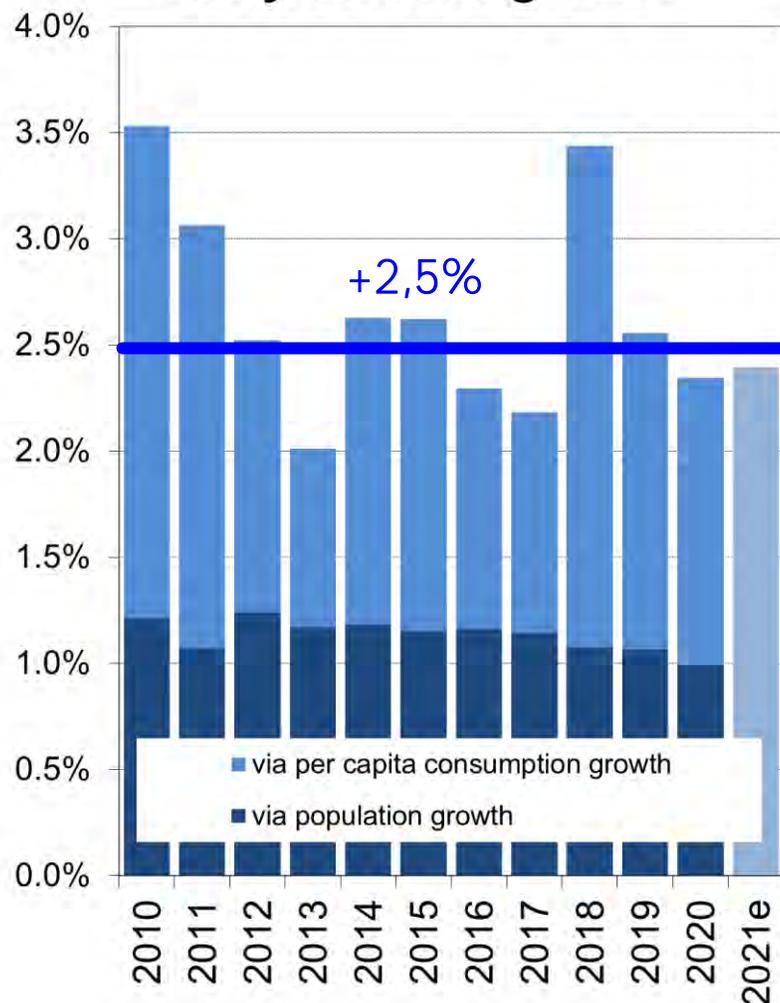


▶ ⏪ 🔊 0:26 / 0:30



GLOBAL DAIRY DEMAND DEVELOPMENTS

Dairy demand growth



IFCN data base 2022, Method milk equivalents

Stories you hear: Dairy =



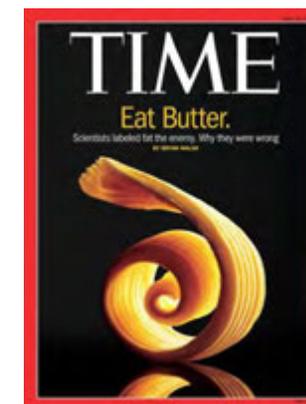
Facts tell us: Dairy =



Drivers for dairy demand

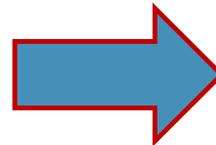
1. More People
2. More dairy / capita 2010 – 2020
 - USA + 10%;
 - EU + 8%
 - Asia > + 30%
 - Africa + 7%

10/10/2022





Dairy world today

 Farm economics

Dairy Outlook



Global dairy trends
and perspectives

IFCN DAIRY RESEARCH NETWORK

Focus on dairy farm analysis

Why?

80% costs to produce a dairy product is to produce the milk on the farm.

80% of the emissions are on farm

Dairy Farm Analysis:

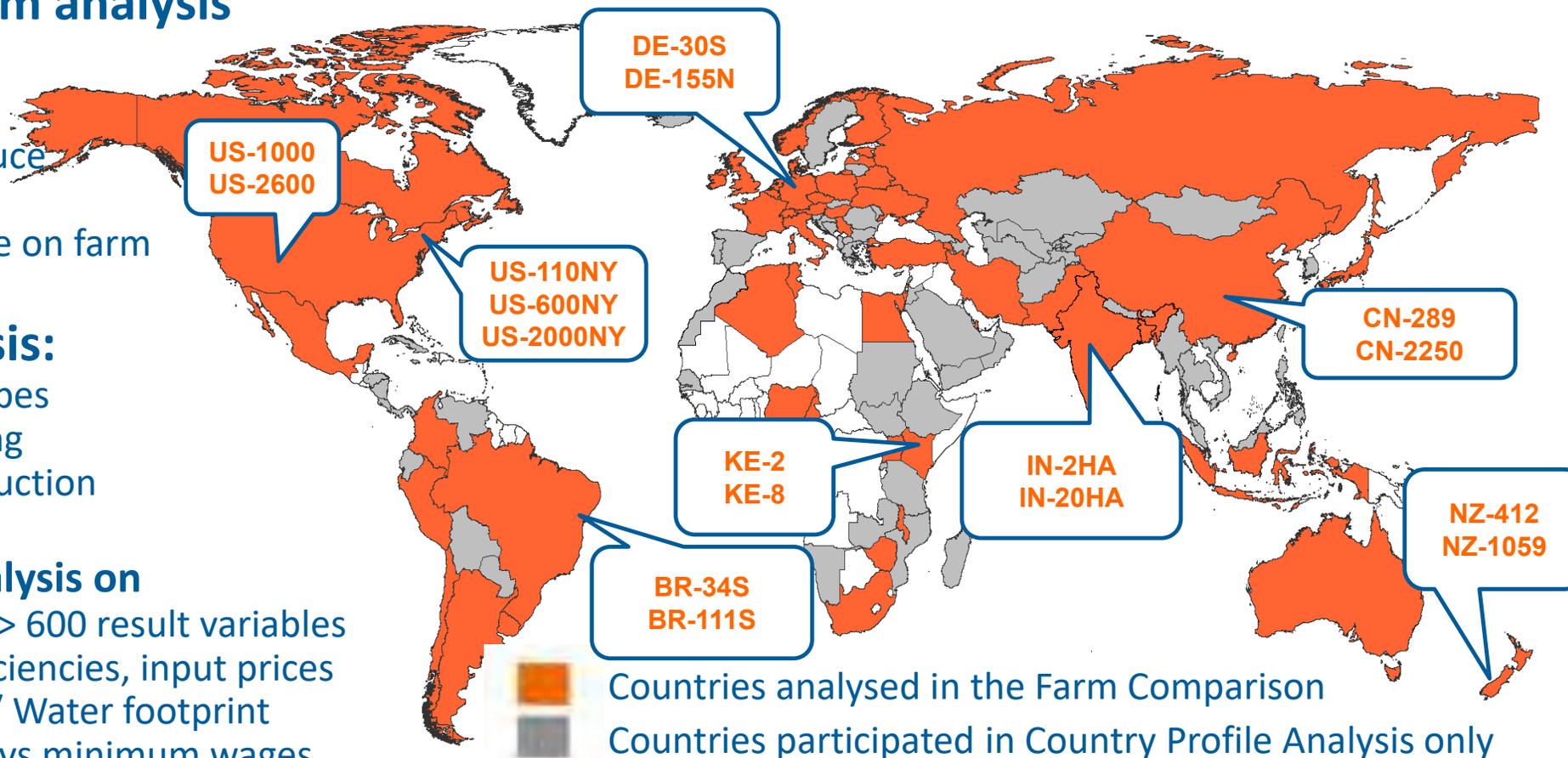
170 Farming systems/types

52 countries representing

89% of world milk production

Farm comparison analysis on

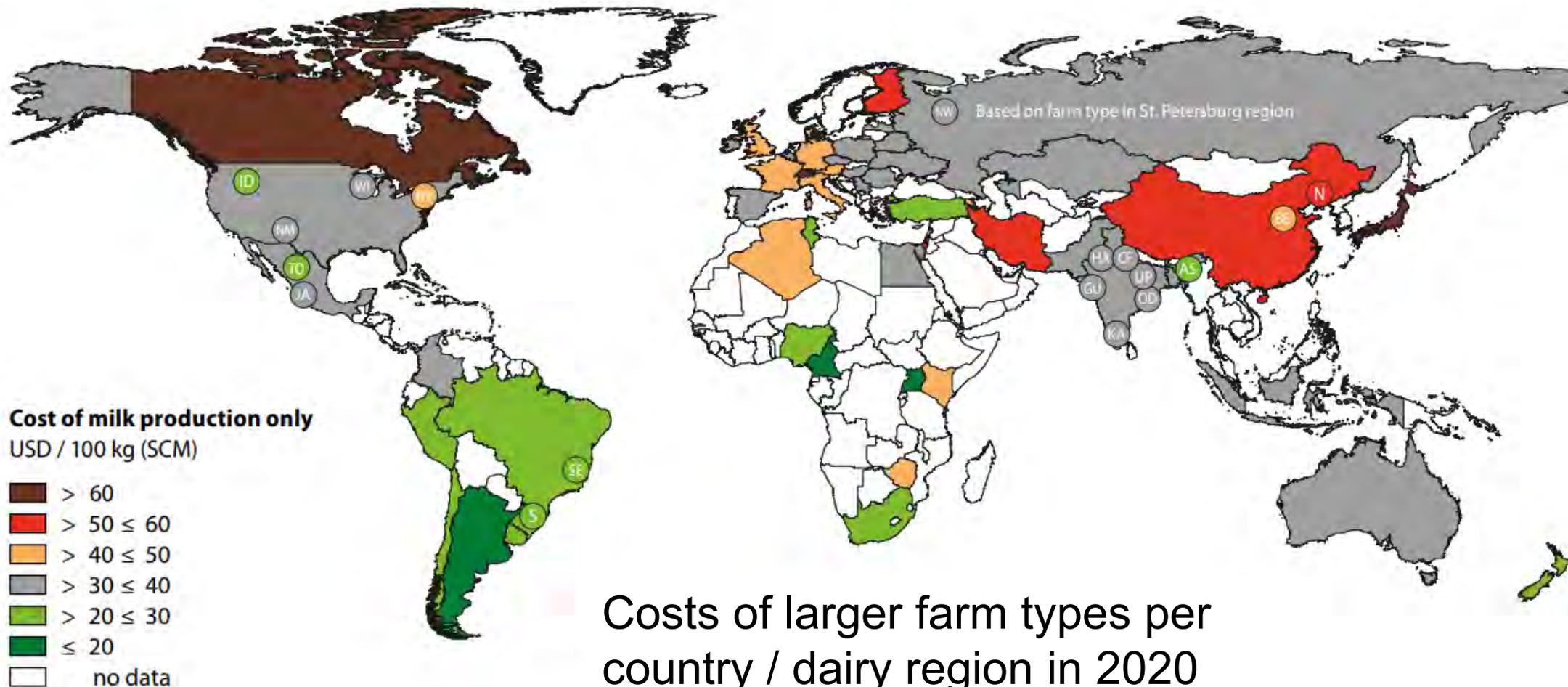
- > 300 variables/farm, > 600 result variables
- **Economics:** Costs, efficiencies, input prices
- **Environment:** Carbon / Water footprint
- **Social:** Farmer income vs minimum wages
- **Animal welfare:** Somatic cells,
- **Resilience:** Start with buffer capacity
- etc.



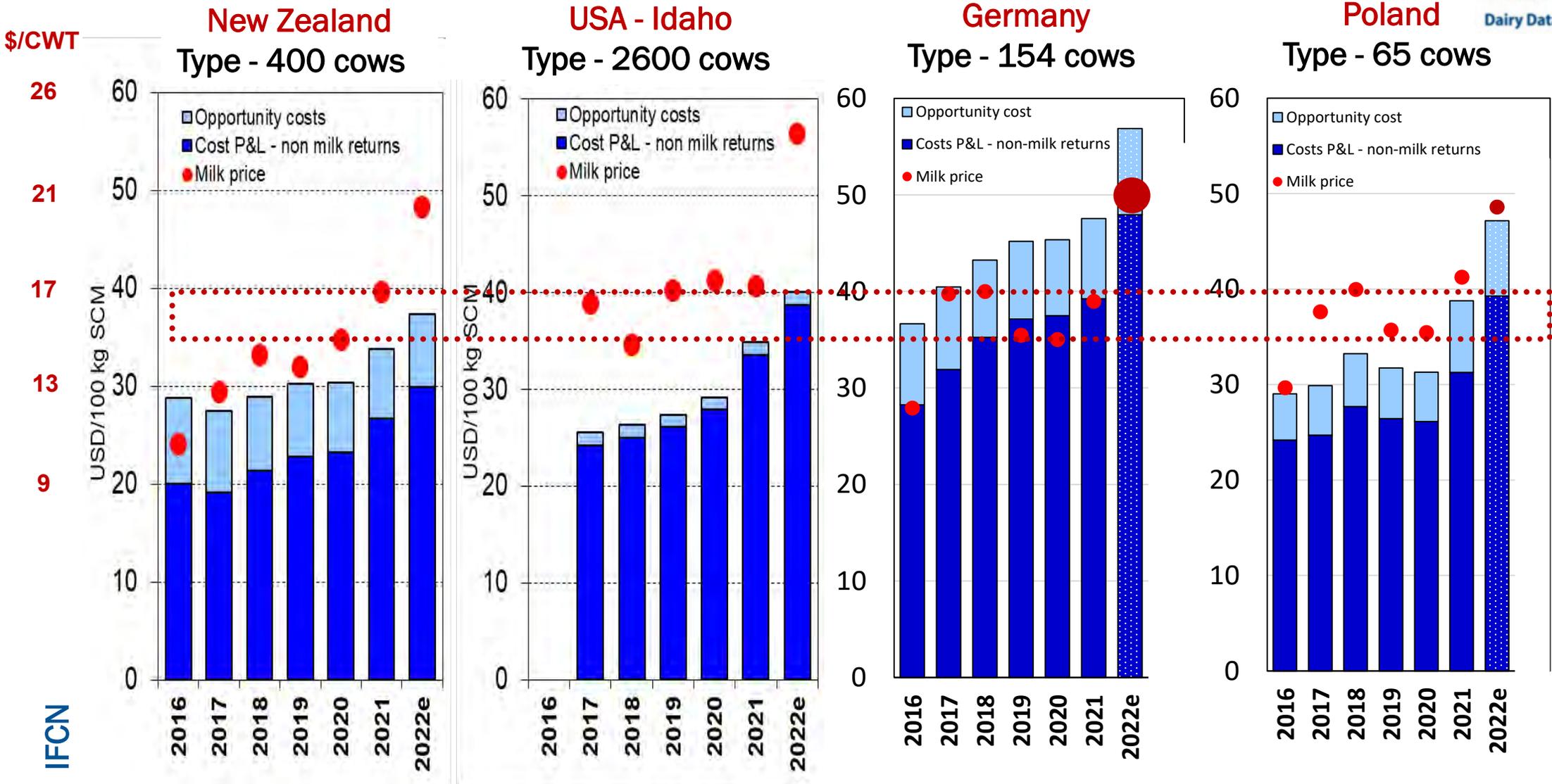
Examples of typical farm types
NZ-412 means a 412 cows farm in New Zealand



COST OF MILK PRODUCTION 2020



COSTS OF MILK PRODUCTION COSTS NZ, USA; EU

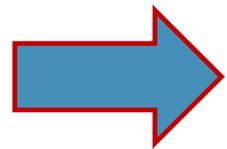


New world prices level
Old world prices level



Dairy world today

Farm economics



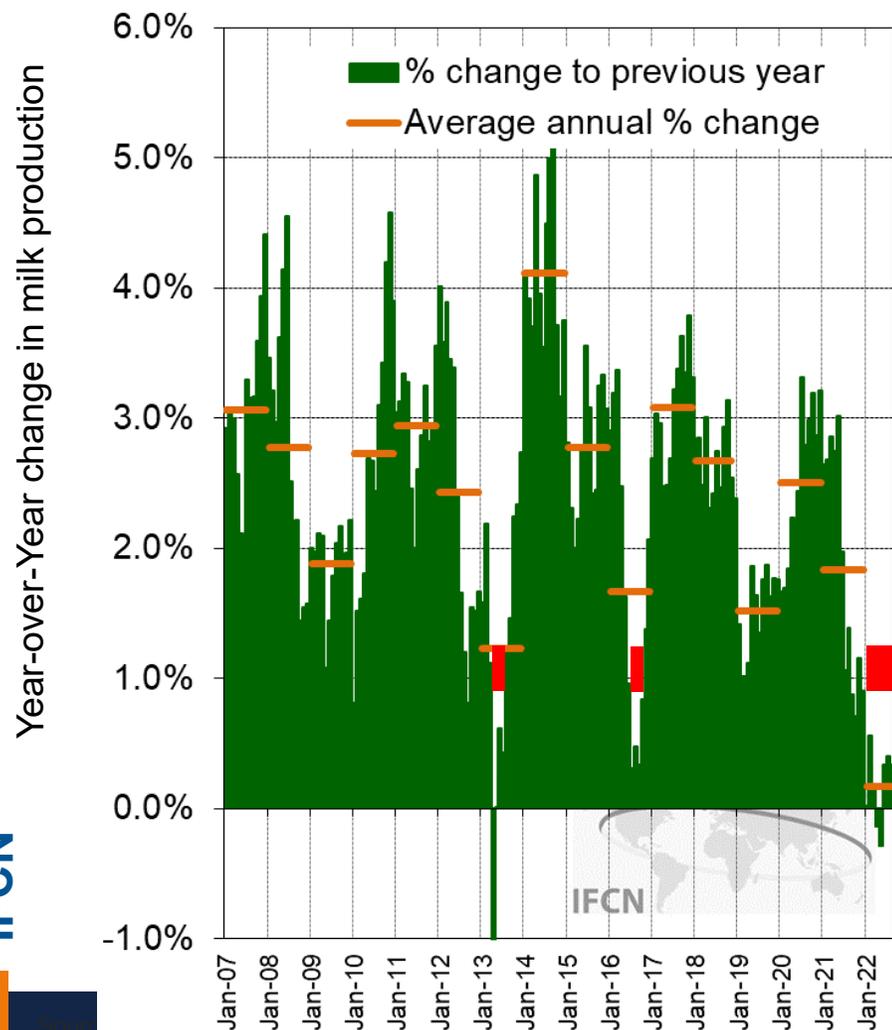
Dairy Outlook
2023



Global dairy trends
and perspectives

IFCN IS MEASURING MILK SUPPLY GROWTH IN REAL TIME FOR 65 COUNTRIES

Change in world* milk production on a monthly basis



IFCN has the world most solid milk supply data

Monthly data standardised for

Fat/protein content, leap year

Real time estimates done + validated

IFCN provides this as monthly data service

Old normal

Good years + 2,5-3%; bad years 1,5%

3-4 month times with very low growth

Current situation

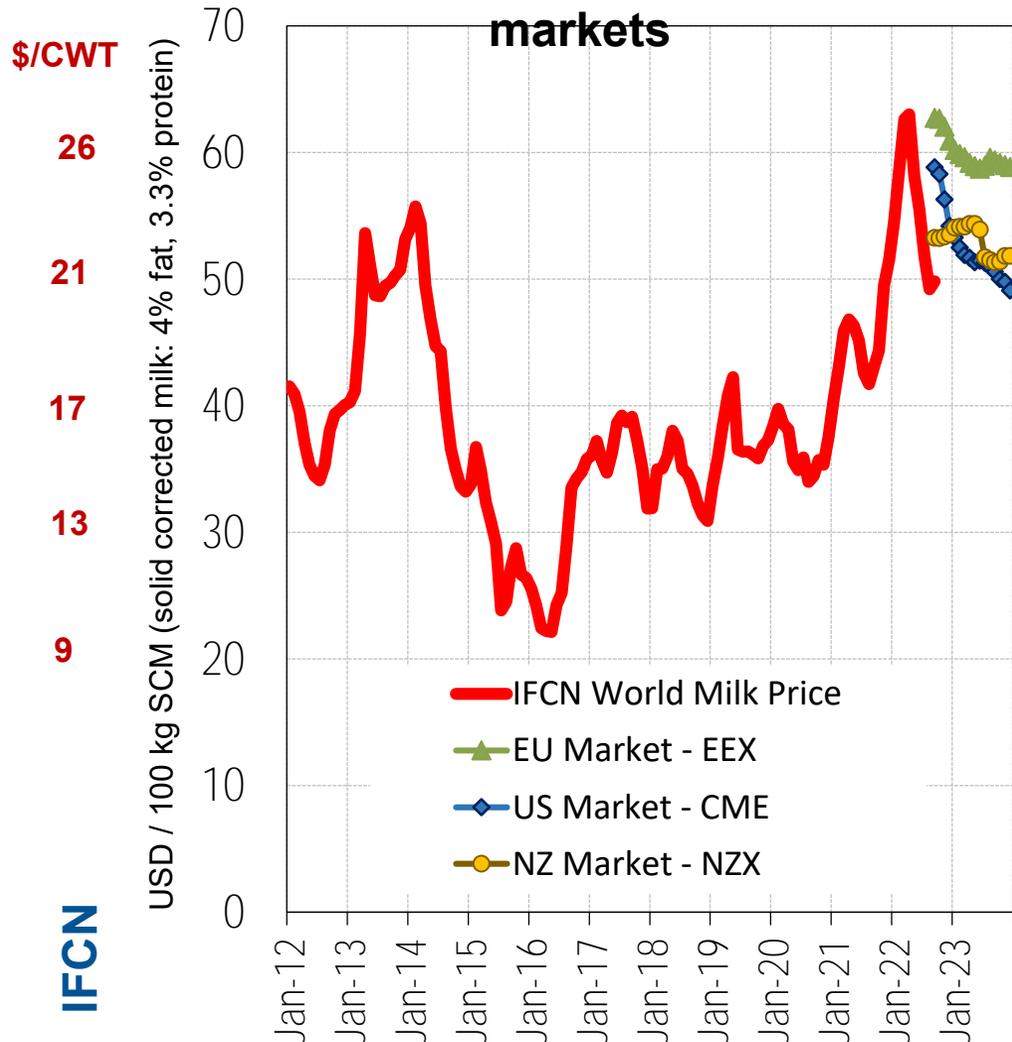
Milk production -0- 0,2% growth in 2022%

> 8 month with very low growth

once we exclude IN/Pk since 14 month no growth!!

WORLD MILK PRICE OUTLOOK 2023

IFCN World Milk Price Indicator and dairy future



Scenario 1

World milk price will decline from peak levels but stay at high levels – a level shift like 2007 is possible

Scenario 2

**=> Rollercoaster times like 2007-2010 2013-2016
2023 lower prices towards 30 US\$/ 100 kg milk
2024 price recovery**

Future market prices taken from 1st September 2022

EEX = European Energy Exchange

CME = Chicago Mercantile Exchange

NZX = New Zealand Stock Exchange



Dairy world today

Farm economics

Dairy Outlook
2030



Global dairy trends
and perspectives



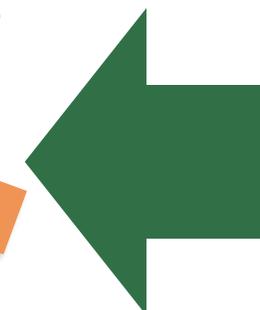
KEY DRIVERS AND FOUR SCENARIOS

+ DEMAND Strong preferences for dairy products

IFCN SCENARIO

INCOME RESTRICTED

PRO DAIRY
DEMAND / SUPPLY GROWTH
LIKE 2010 - 2020



+ POLICY & ECONOMICS

„STAGNATION
OR SHRINKING ?“

RICH AND PICKY

- DEMAND More dairy-free diets (+ less food waste)

THE DAIRY WORLD IN 2030 VS 2020



8.6 billion people
+11%, + 0.9 bn

+21% more milk
produced and consumed
(+192 mill t milk SCM = 2x USA today)



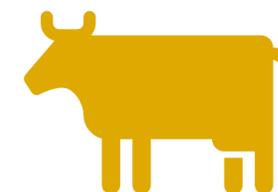
2.2 kg CO₂ eq. /kg milk
-13%, -0.3 kg CO₂ eq. / milk



131 kg “milk” consumed
+8.8%, +11 kg ME/capita



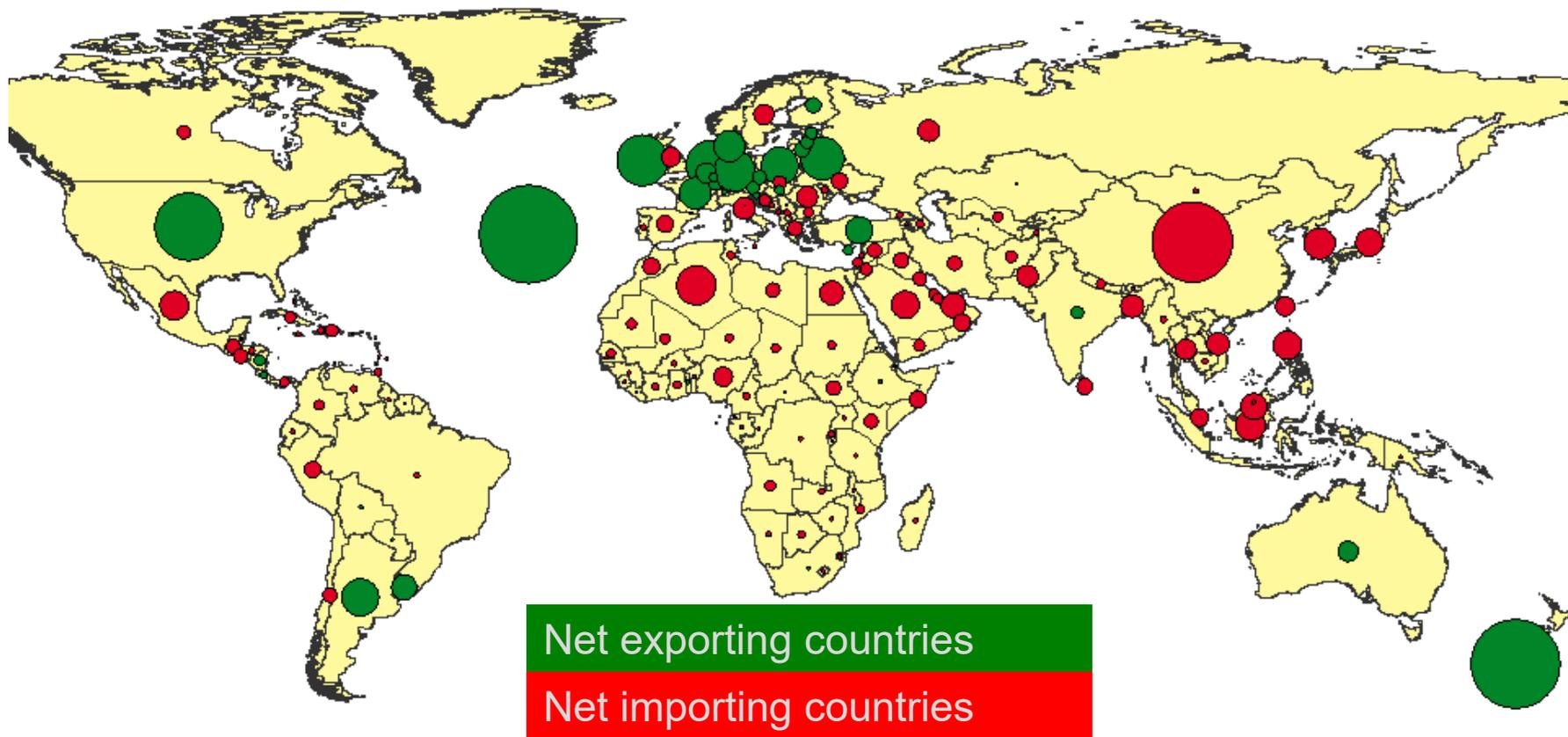
81 mill t ME traded*
+22%, +15 mill t ME



351 mill dairy “cows”
-3.7%, -14 mill heads

* excl. EU-intra trade

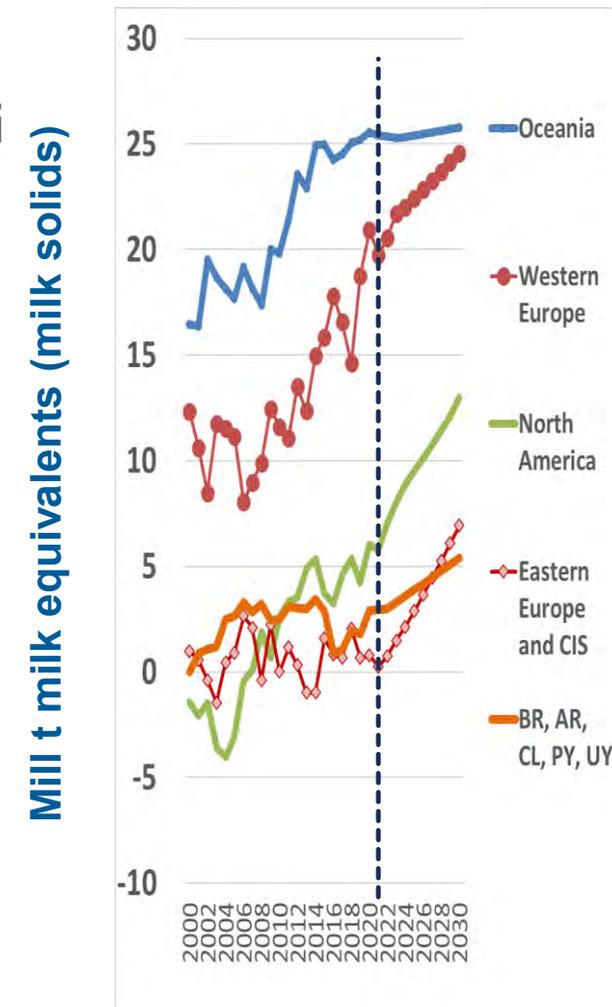
DAIRY SURPLUS / DEFICIT IN 2030



Bullet size = Milk surplus or deficit in milk equivalents

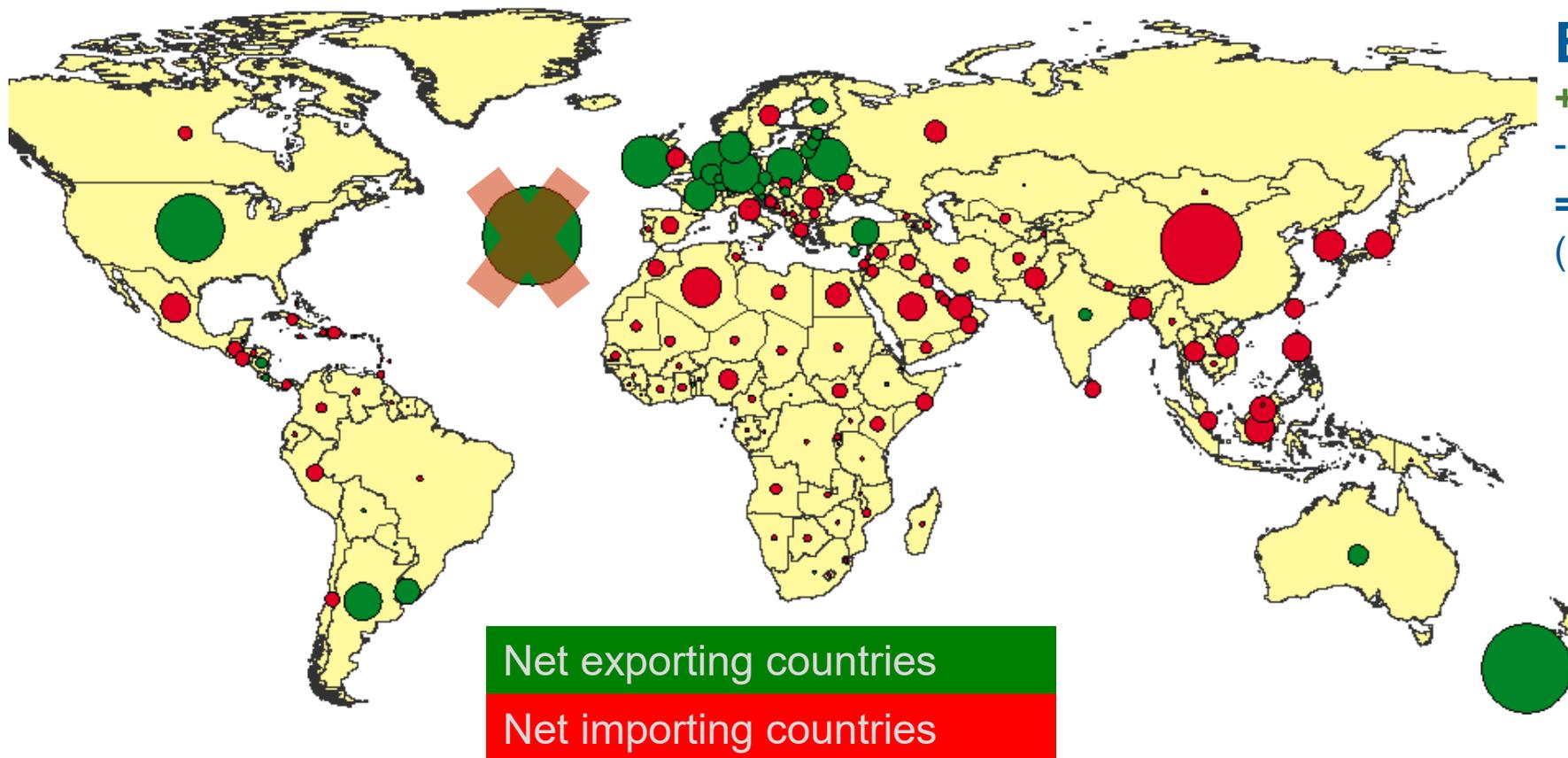
10/10/2022

Key dairy exporting regions



DAIRY GAME CHANGERS & IMPACTS

MAP: BASELINE MILK SURPLUS/DEFICIT 2030 IN PRO DAIRY SCENARIO



Net exporting countries
Net importing countries

Bullet size = Milk surplus or deficit in milk equivalents

EU IFCN outlook 2030

+0,5% / year more milk
-1% cows, +1,5% yields

=> + 6 mill t dairy exports
(Supply + 9millt; demand + 3 mill t)

EU Scenario 2

-1% / year less milk
=> dairy exports = 0 in 2030
> 20 mill t less supply
=> + world price + x%

Other scenario

- NZ policy impact – x% milk
- India milk supply growth ?
- Climate disasters
(California, Australia?)

-

SUMMARY



Look at the facts not “rumors”

People still love dairy, and demand is growing



Dairy Outlook 2023: We live in bizarre time 2022

2023 two scenarios possible & a new price level



Dairy Outlook 2030: Dairy demand growth 2* the US milk today

A golden area? But - is US- Dairy ready for this?

Will it be competitive; take social responsibility, etc.





Global dairy trends and perspectives

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GLOBAL DAIRY SYMPOSIUM

6th October 2022, World Dairy Expo; USA

View from the cheese aisle

Why buy U.S.?

Sheryl Meshke
AMPI Co-President and CEO

October 7, 2022







Membership and Manufacturing Area

- B Blair
- F Freeman
- H Hoven
- JF Jim Falls
- NU New Ulm
- PV Paynesville
- PO Portage
- S Sanborn

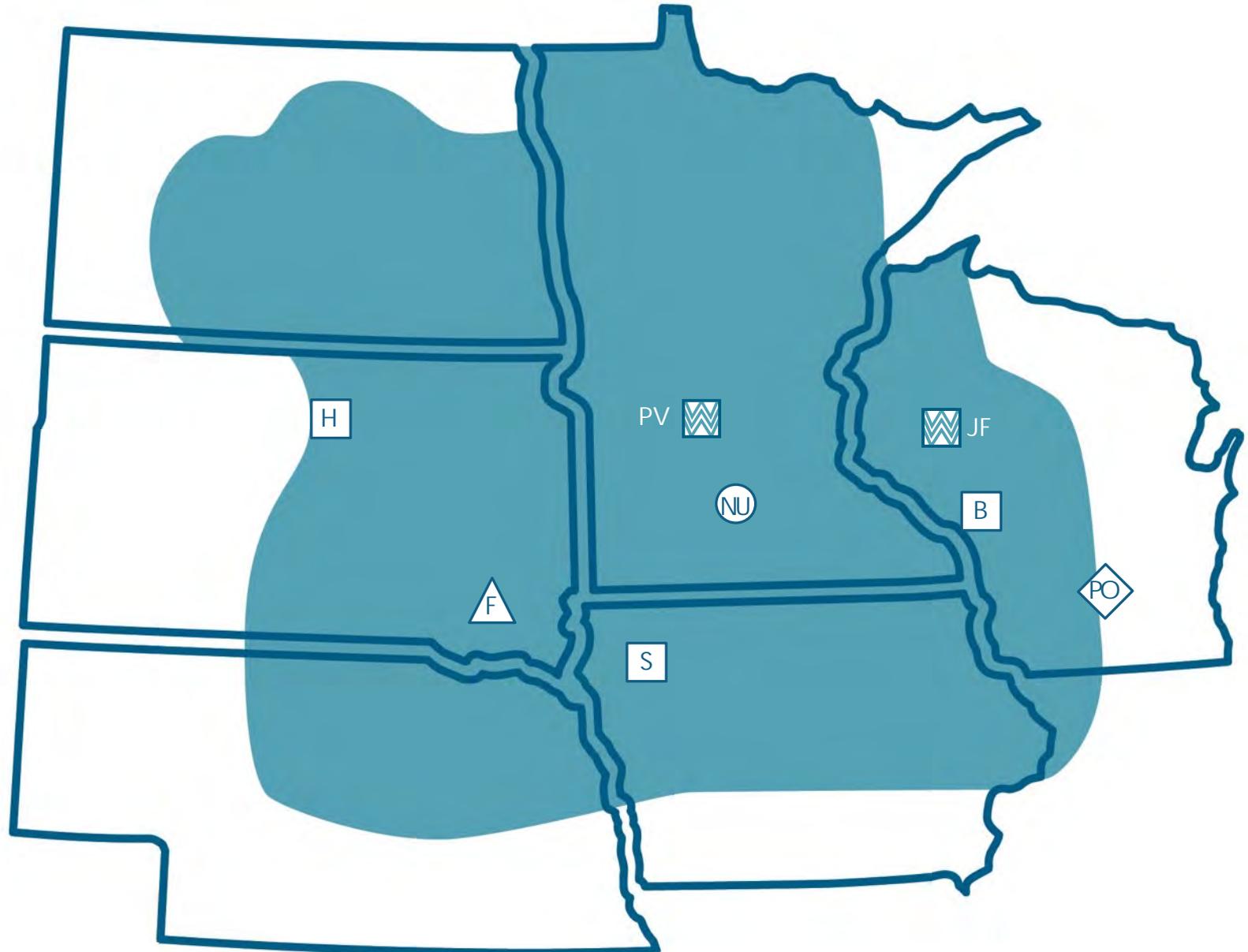
□ Cheese – Manufacturing

▨ Whey Drying

◇ Cheese –
Consumer Packaging

△ Nonfat Dry Milk

○ Butter –
Consumer Packaging





AMPI VISION

WE MAKE
**THE DAIRY
PRODUCTS**
THAT MAKE
THE BRAND.



We believe what we're made of is as important as what we make.
Our core values – **commitment to quality, responsibility to others and determination to succeed** – guide us in all we do.



View from the cheese aisle

Why buy U.S.?

1. Availability
2. Reliability
3. Responsibility

View from the cheese aisle

Why buy U.S.?

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FHA 05 TO 08
FOOD & BEVERAGE SEP 2022
SINGAPORE EXPO



Do you have enough milk
to make the cheese?

YES



Global Milk Production

In Billion Pounds



	2021 Total Milk Production	YOY Change 9-Year Avg.	YOY Change 3-Year Avg.
European Union	314	3.8	1.0
United States	166	2.7	2.3
New Zealand	47.6	0.3	-0.3
Australia	18.9	-0.1	0.0





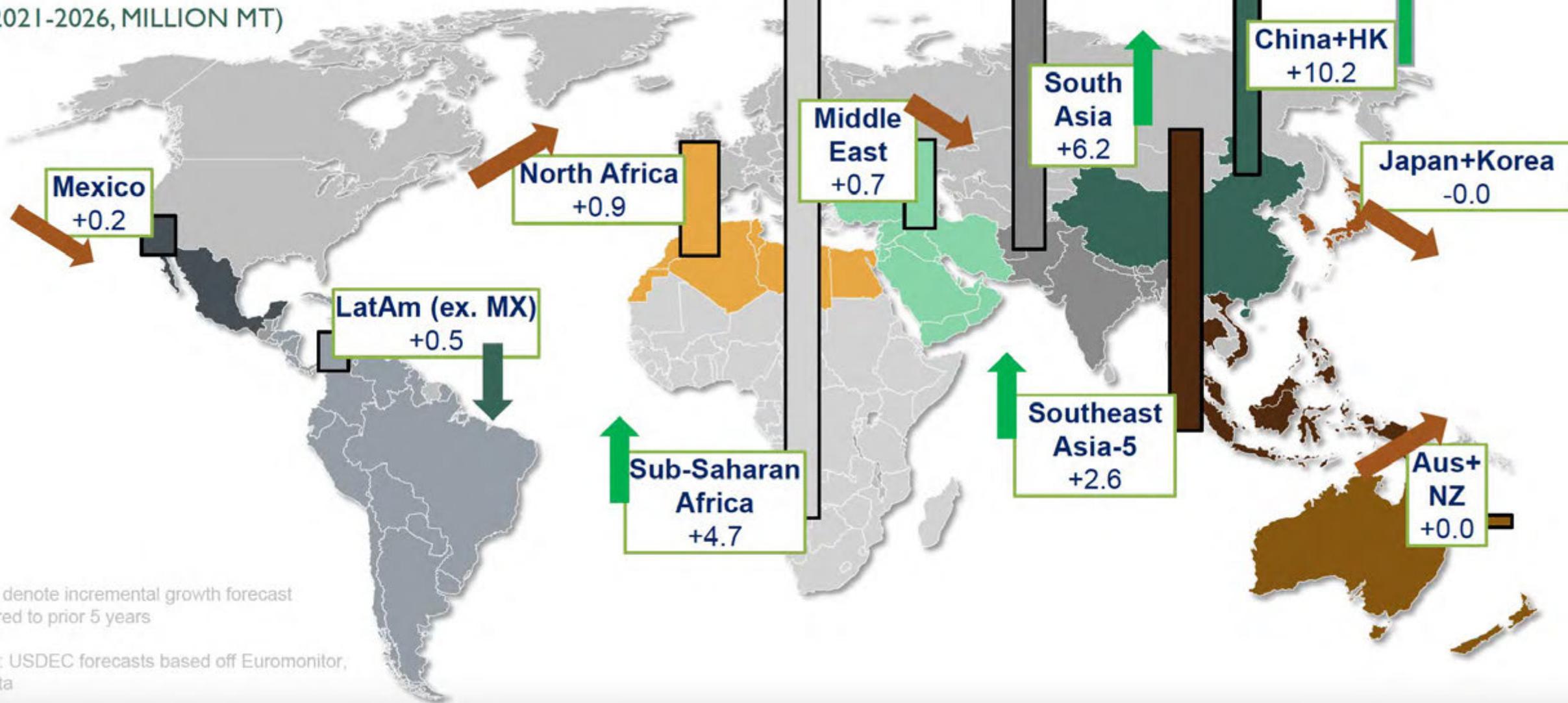
View from the cheese aisle

Why buy U.S.?

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FORECAST: PROTEIN CONSUMPTION GROWTH

(2021-2026, MILLION MT)



Arrows denote incremental growth forecast compared to prior 5 years

Source: USDEC forecasts based off Euromonitor, IMF data



China







View from the cheese aisle

Why buy U.S.?

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The logo features a stylized green square divided into four quadrants by two overlapping white arcs. The top-left and bottom-left quadrants are a darker shade of green, while the top-right and bottom-right are a lighter shade.

U.S. Dairy
STEWARDSHIP
COMMITMENT
Innovation Center for U.S. Dairy



Responsibly Produced



Nourishing Communities



Continuous Improvement



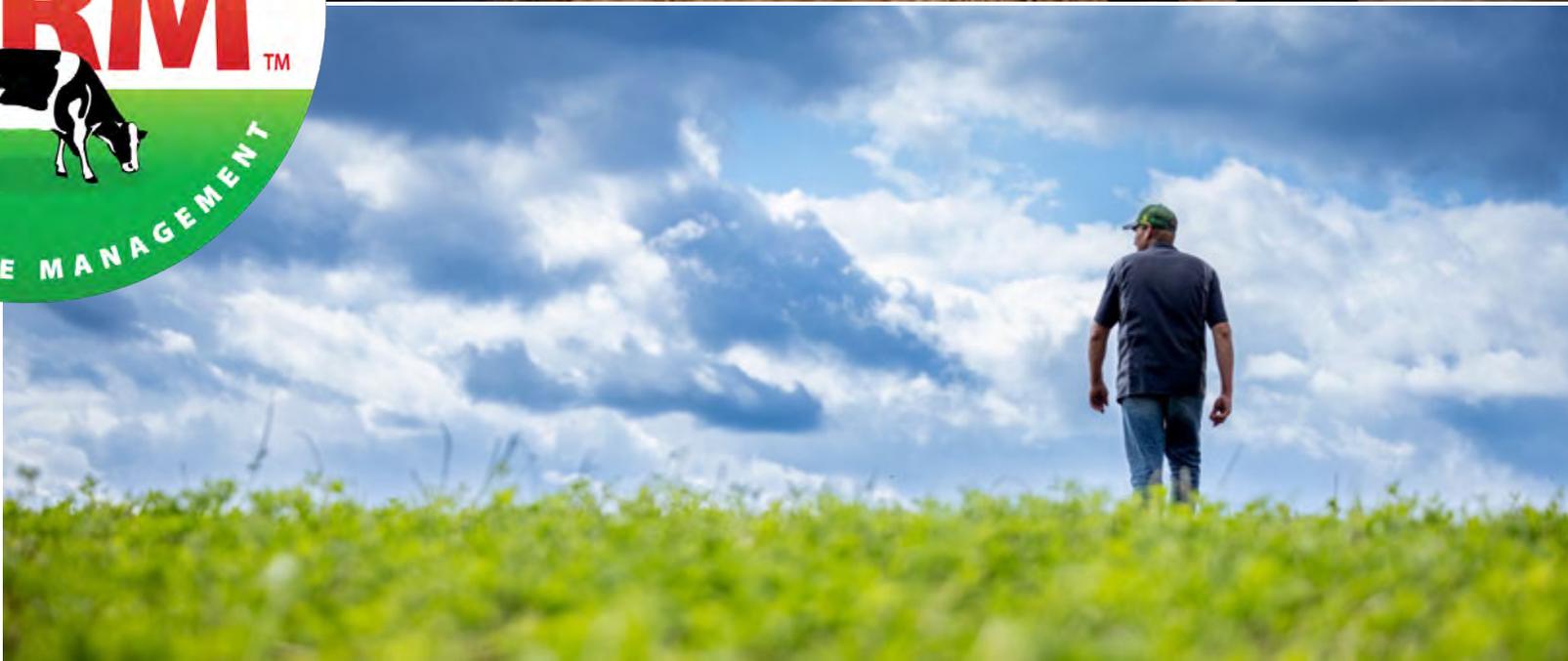


Co-op Crafted
with care



2021 AMPI Stewardship Report





ENVIRONMENTAL STEWARDSHIP

Quantifies a dairy farm's GHG + energy use footprints and assesses use of nutrient management plans

2,600+ assessments completed to-date

41 participating organizations representing **80%** of milk supply

Strong science with periodic updates

Resources for **continuous improvement**

Enables supply chain **reporting and collaboration**

Footprint (lb. CO2e / lb. FPCM") broken down by category



On-Site Enteric



On-Site Energy Use



On-Site Manure



Feed Production





**U.S. Dairy
Sustainability Awards**
Innovation Center for U.S. Dairy®



View from the cheese aisle

Why buy U.S.?

1. Availability

2. Reliability

3. Responsibility

View from the cheese aisle

Why buy U.S.?

Sheryl Meshke
AMPI Co-President and CEO

October 7, 2022





**GLOBAL
DAIRY
FARMERS**

**Dairy farming in Europe; balance
between business model and
sustainability**

www.globaldairyfarmers.com

president@globaldairyfarmers.com



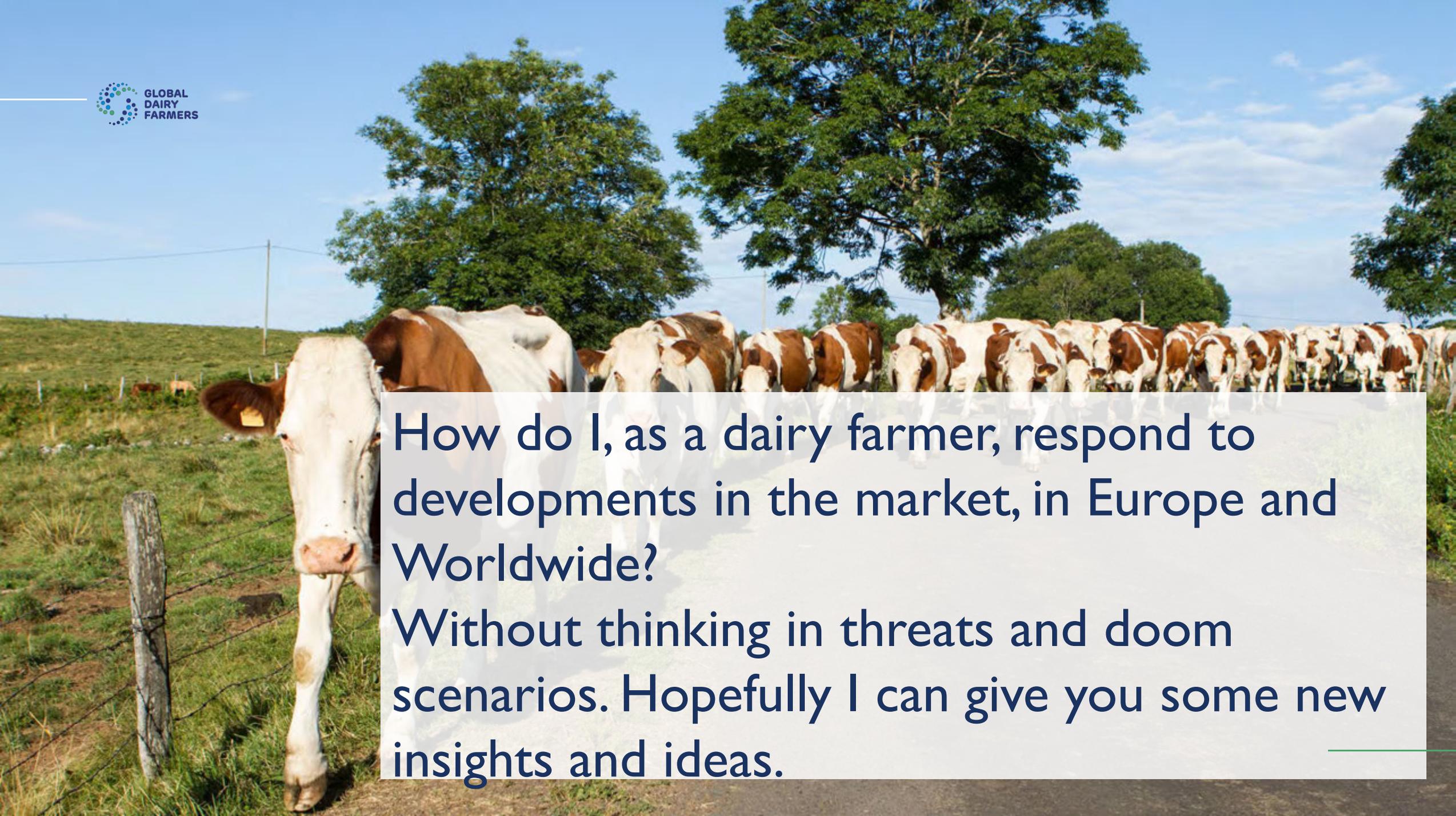
Global Farmer
Network



WHAT'S HAPPENING IN THE WORLD AND WHAT IS THE IMPACT ON THE DAIRY BUSINESS AND OUR FARM?

- And....where, how and who will produce this milk?
- My perspective:
- Dairy farming in the Netherlands for many generations. Look to the market and as a dairy farmer!!





How do I, as a dairy farmer, respond to developments in the market, in Europe and Worldwide?

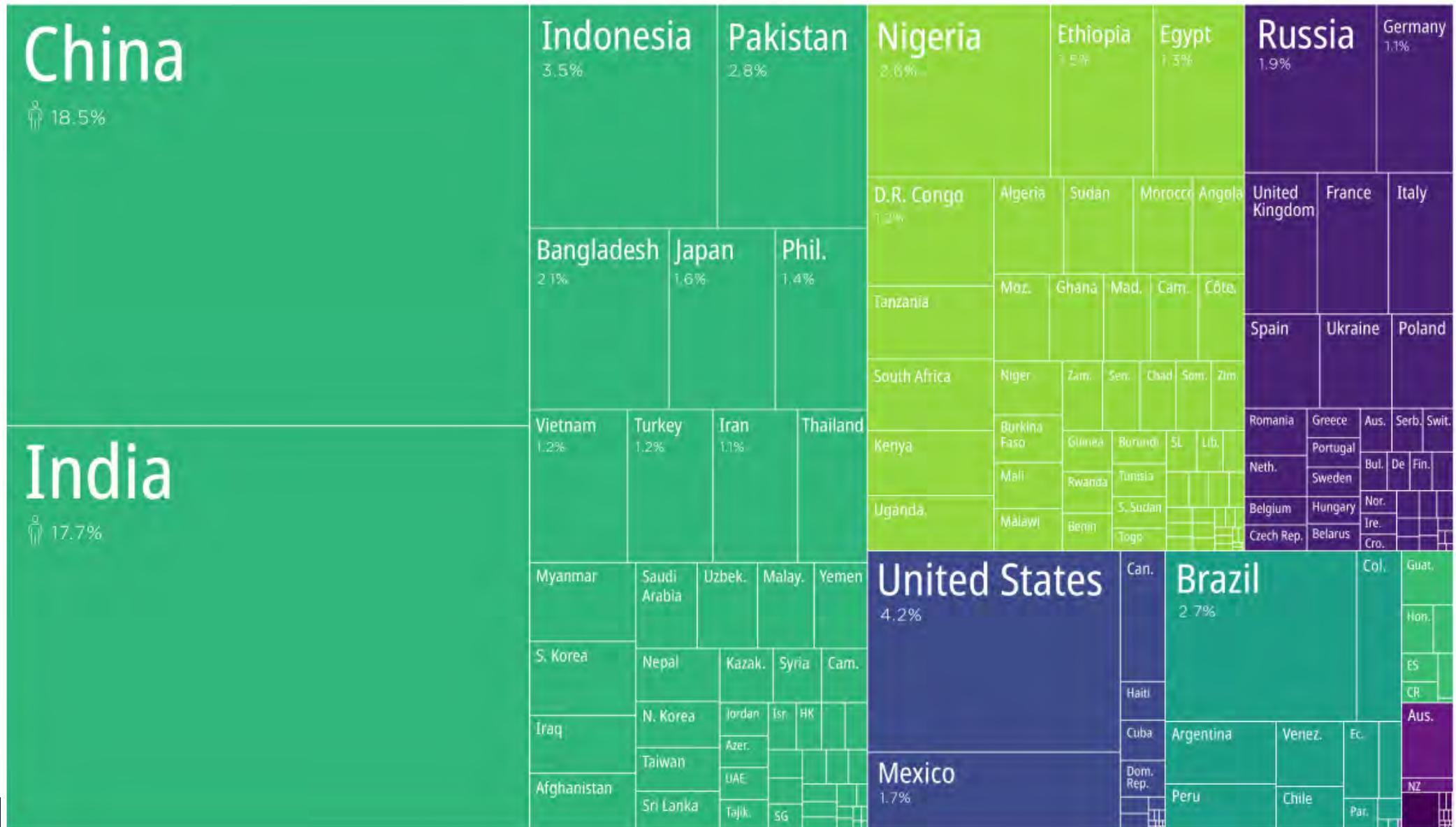
Without thinking in threats and doom scenarios. Hopefully I can give you some new insights and ideas.

MAIN QUESTIONS/TOPICS: #DAIRY

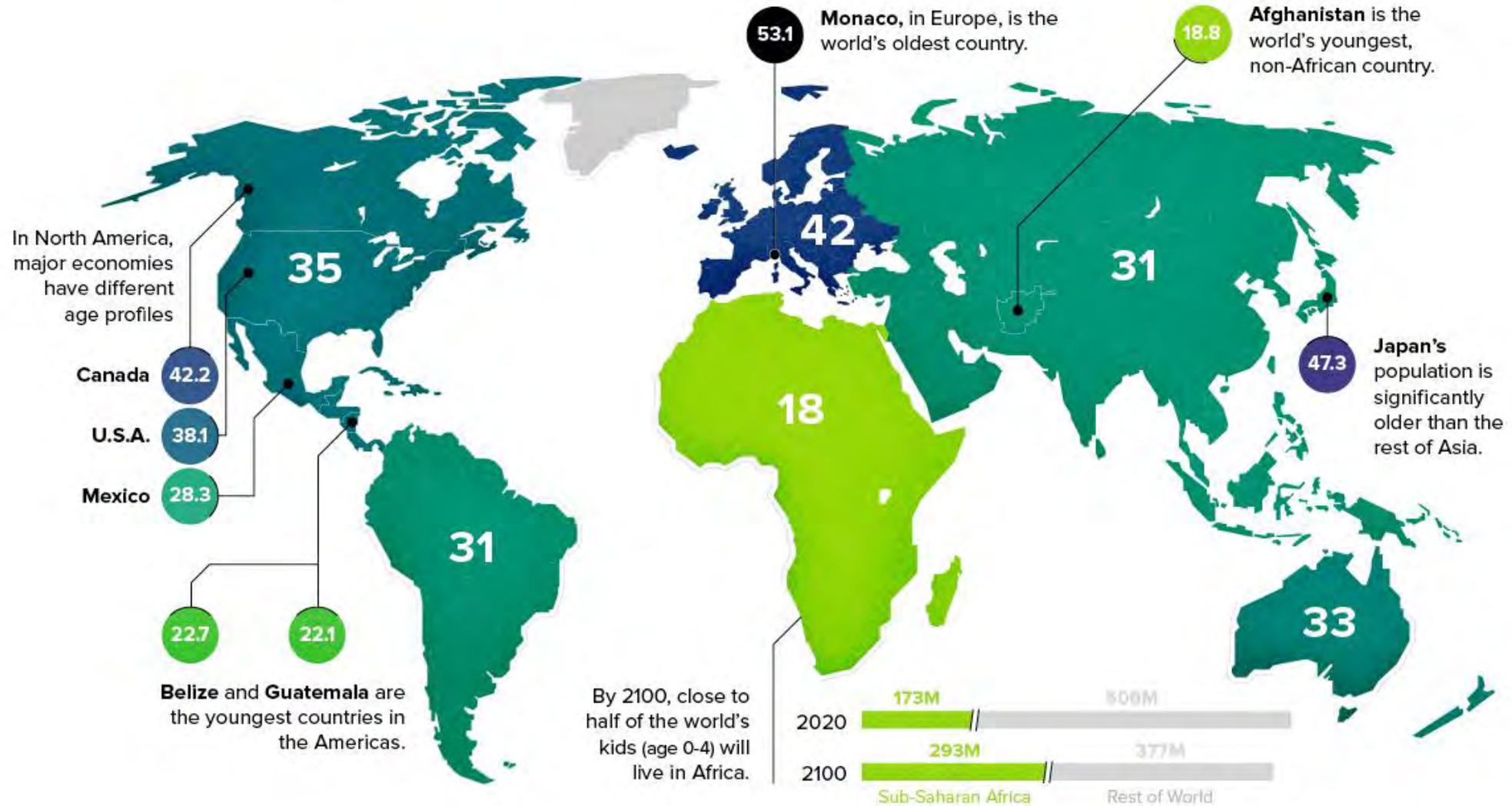
- Dairy consumption; trends, products(new), per capita
- Population growth; where, impact
- Production dairy/milk; where, how and by whom + **BUSINESS MODEL!!!**
- Climate change
- Sustainability
- Technology/innovations



VISUALIZING THE MOST POPULOUS COUNTRIES IN THE WORLD



MEDIAN AGE





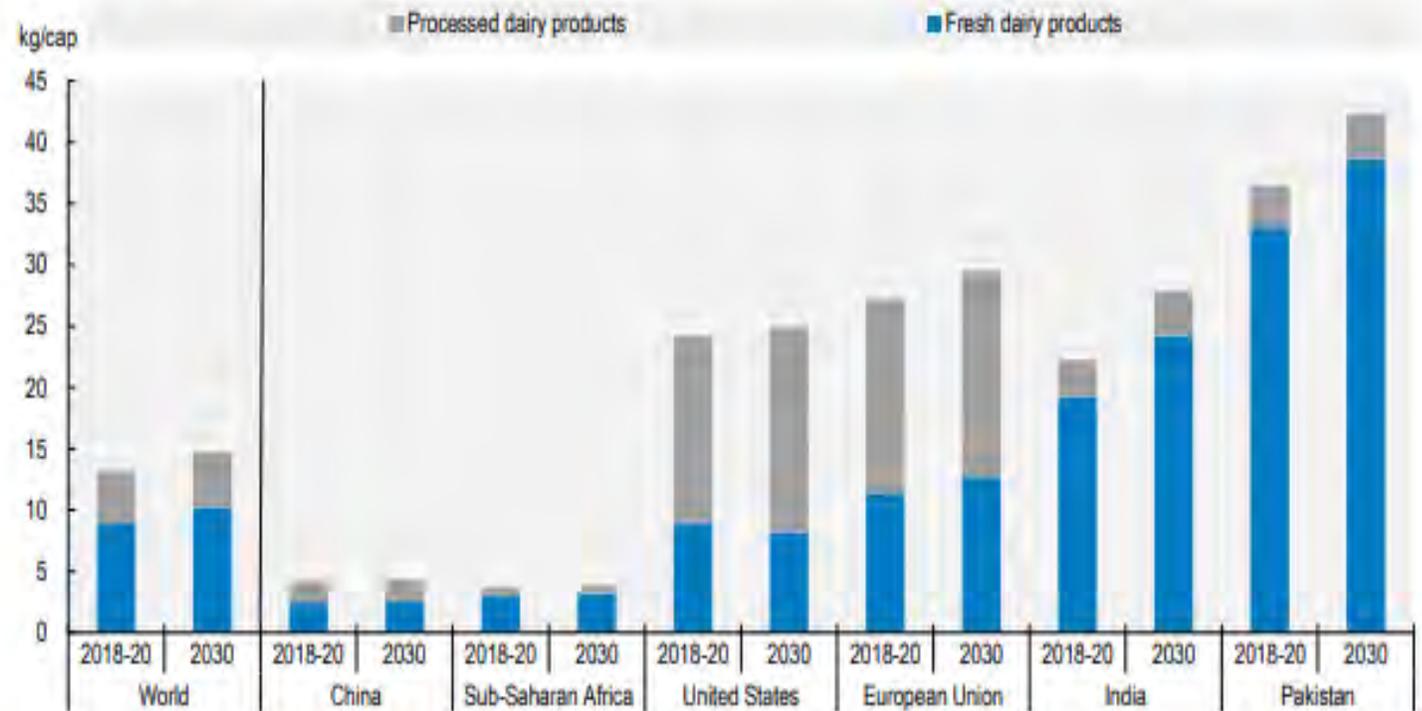
2017			2030			2050		
Rank	Country	Population	Rank	Country	Population	Rank	Country	Population
1	China	1 410	1	India	1 513	1	India	1 659
2	India	1 339	2	China	1 441	2	China	1 364
3	United States of America	324	3	United States of America	355	3	Nigeria	411
4	Indonesia	264	4	Indonesia	296	4	United States of America	390
5	Brazil	209	5	Nigeria	264	5	Indonesia	322
6	Pakistan	197	6	Pakistan	244	6	Pakistan	307
7	Nigeria	191	7	Brazil	225	7	Brazil	233
8	Bangladesh	165	8	Bangladesh	186	8	Bangladesh	202
9	Russian Federation	144	9	Mexico	148	9	Dem. Rep. of the Congo	197
10	Mexico	129	10	Russian Federation	141	10	Ethiopia	191
11	Japan	127	11	Ethiopia	140	11	Mexico	164
12	Ethiopia	105	12	Philippines	125	12	Egypt	153
13	Philippines	105	13	Japan	122	13	Philippines	151
			14	Democratic Republic of the Congo	120	14	United Republic of Tanzania	138
			15	Egypt	120	15	Russian Federation	133
			16	Viet Nam	106	16	Viet Nam	115
						17	Japan	109
						18	Uganda	106

- Strong population growth in Africa/Asia
- EU-27 2021 450 million population, little increase to 2050
- Nigeria, Indonesia, Pakistan, Ethiopia; upcoming world powers

PER CAPITA CONSUMPTION, NOW AND IN 2030.



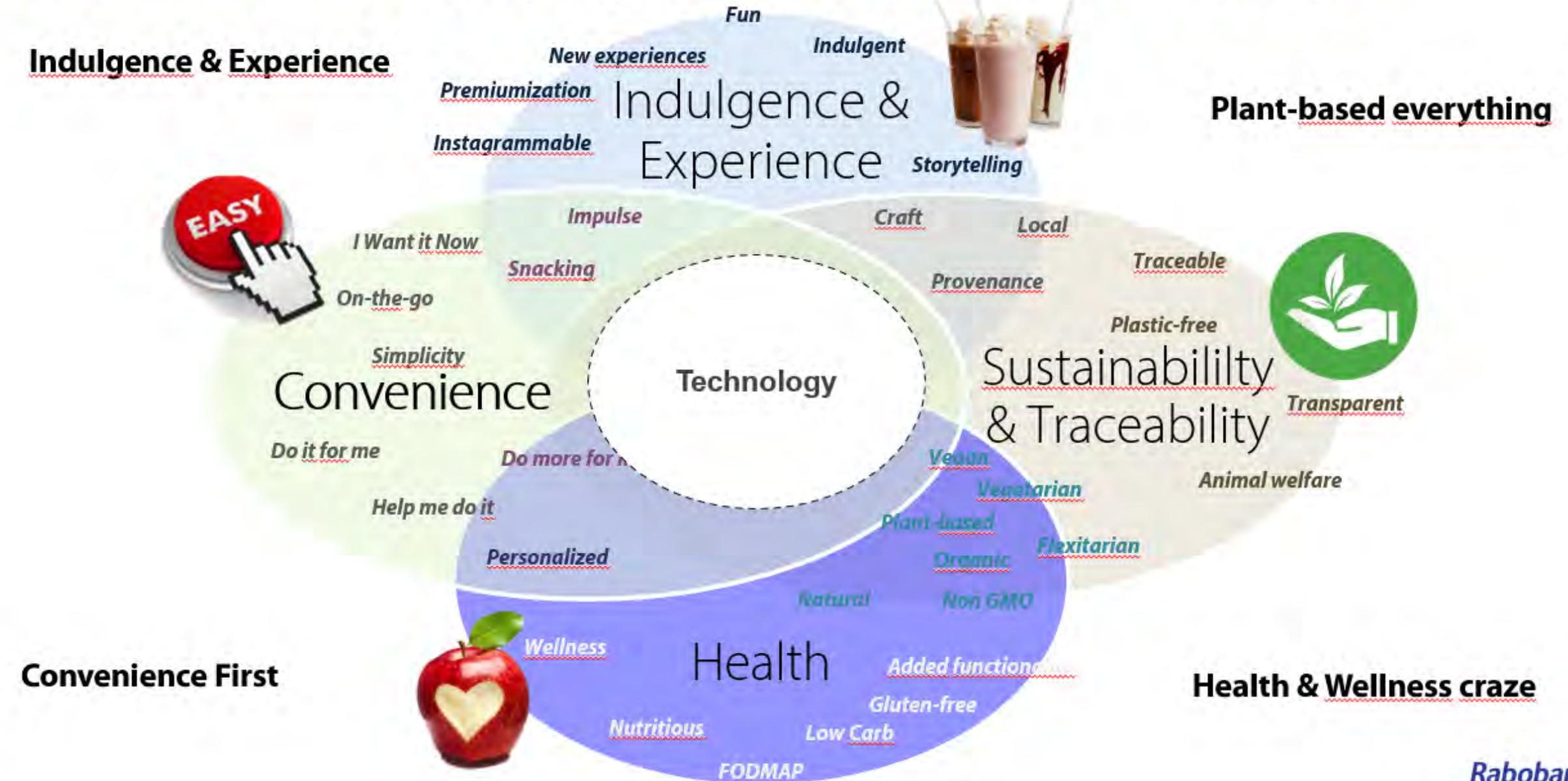
Figure 7.1. Per capita consumption of processed and fresh dairy products in milk solids



Note: Milk solids are calculated by adding the amount of fat and non-fat solids for each product; Processed dairy products include butter, cheese, skim milk powder and whole milk powder.

Source: OECD/FAO (2021), "OECD-FAO Agricultural Outlook OECD Agriculture statistics (database)", <http://dx.doi.org/10.1787/agr-outl-data-en>.

Consumer Trends Shaping Current and Future Demand



ACROSS EVERY DAIRY COMMUNITY.
THROUGHOUT EVERY CONTINENT.
WE ARE TAKING ACTION.

BE PART OF PATHWAYS TO DAIRY NET ZERO.

Your guide to the initiative



TOGETHER WE CAN RAISE DAIRY'S AMBITION AND ACCELERATE CLIMATE ACTION

The global dairy community is coming together to help reduce the sector's impact on the planet.

THE NEED FOR DAIRY IS GREATER THAN EVER

30% Increase in milk production
in 10 years to meet growing
nutrition demands¹

Efficiency improvements mean that producing
a glass of milk now results in:

11% Less greenhouse
gas emissions¹

**BUT DAIRY, LIKE ALL SECTORS, KNOWS
THERE IS MORE WORK TO DO...**

CHINA & INDIA

• Home / Business / Industries

Pandemic gives boost to dairy consumption

By ZHU WENQIAN | chinadaily.com.cn | Updated: 2021-05-27 13:34



THE INDIAN
MILK MARKET:
Health and ethical
claims offer strong
opportunities to milk
market potential



SOURCE: MINTEL



Milk products are displayed at an exhibition in Shanghai. [Photo by Wang Zhuangfei/China Daily]

DAIRYMEN INSIGHT AND ANALYSIS



Watch: Gen Z experts explain why young people are wary of dairy and how to fix it

20 November 2020 | By The Grocer

Gen Z just isn't buying milk, with some people even calling evil, so for this year's Dairymen creative challenge, we tasked creative agency Zak with breathing new life into the white stuff



Creative Challenge: can milk be futureproofed?

20 November 2020 | By Megan Tatum

Gen Z just isn't buying milk, with some even calling it evil. So we tasked creative agency Zak to come up with a brand that breathes new life into the white stuff



SUSTAINABILITY AND ENVIRONMENT

Animal Rebellion's anti-dairy tantrums won't be as effective as a reasoned argument

By [Joanna Blythman](#), food journalist and author of *Swallow This* | 28 September 2022

Making your voice heard is a civil right, but protests won't stop people drinking milk, says Joanna Blythman



CONCLUSIONS # QUESTIONS



Milkproduction
must increase
worldwide

Large market
companies like
Nestlé, Unilever
go “sustainable”

Climate
change/sustainab
lity topics

Impact
Technology/Inno
vations

- Who will deliver milk/dairy to Asia/Africa?
 - Europe: high added value, cheese, sustainable (Netherlands, Ireland) Growth in volume?
 - Oceania: close to markets, no growth in New Zealand, milkpowder
 - USA: '21 17% of total production, future?



KEY MESSAGES



Agriculture → significant part of the solution of today's planetary challenges.



Farmers → can achieve this if they are willing and able to transform, linked to professionalism, also smaller farms



Farmers income, the Business Model, is critical for transition. Direct or indirect, meaning through cooperatives or combination coops/private companies



Possible → Dairy Net Zero? Regenerative? Profitable?



Global growth outlook is still strong



Classic dairy scene in The Netherlands

HOW TO FEED THE WORLD?

- Responsibility EU/Netherlands!!!
- Perfect climate conditions for agriculture.
- Strong processing industry/ infrastructure
- Well educated farmers.
- Life space, environment + “make nature” vs agriculture
- Sentiment society, how to manage?



ECONOMY & SUSTAINABILITY



1.6 m
cows



Dairy product
export

Export value

€ 8 bn

62%
of dairy farms
save energy by utilizing
the natural heat
from milk



43%
less antibiotic
use in 2020
compared
to 2009



Dairy's
contribution
to the Dutch trade
balance

7%



35%
Domestic
market



Outside of the EU
1. China
2. United States
3. United Kingdom



EU market
1. Germany
2. Belgium
3. France



51
dairy factories



47,000
employment
in dairy farming
and dairy industry (fte)



84%
of farms practice
grazing

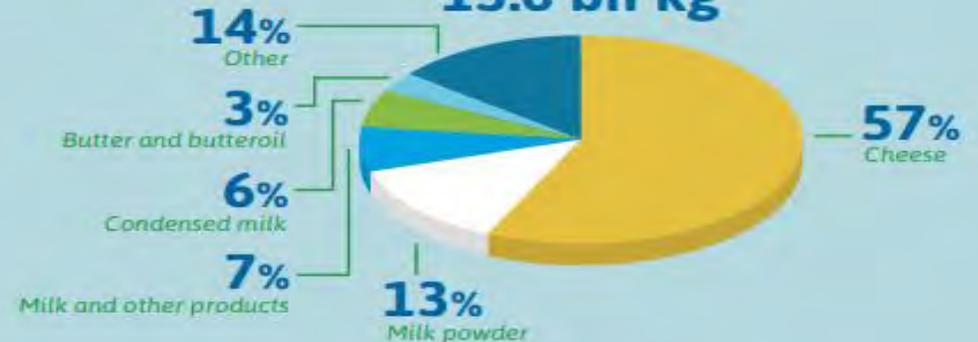


36%
have solar panels

100%
use responsible soy



Milk supply
13.6 bn kg

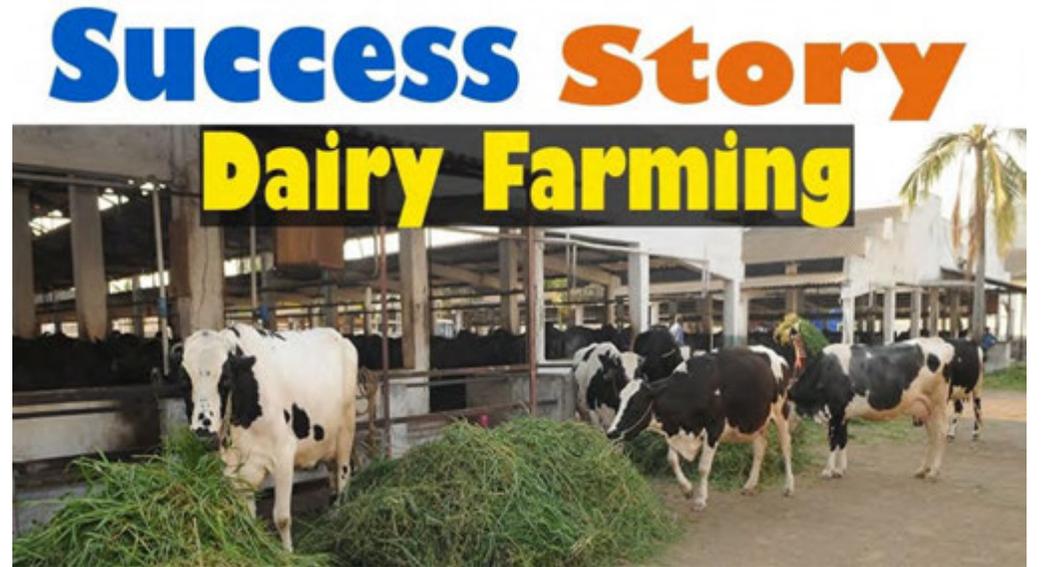


FUTURE DAIRY FARMERS

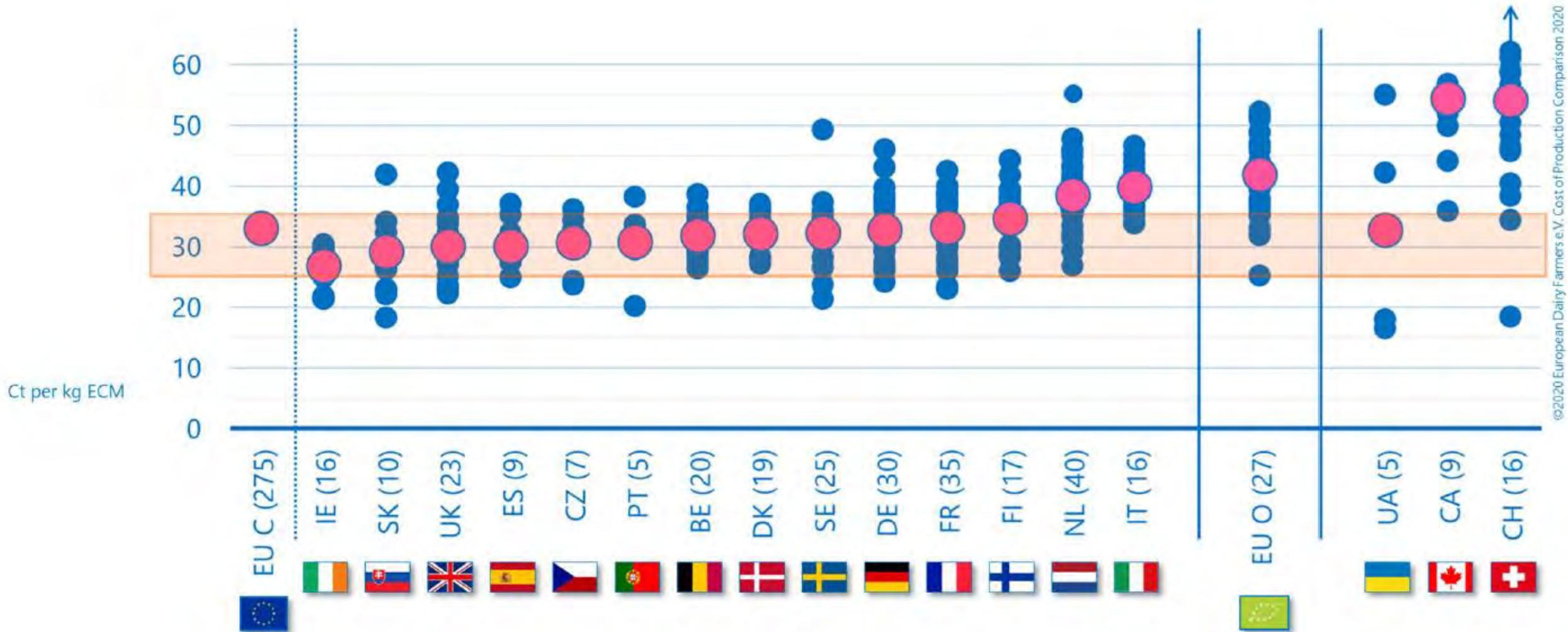


BUSINESS MODEL

- Top 25% of region, country
- Open for transition/innovation
- Top technical results, top management
- Top quality milk, animals, crops, forage
- Vision, strategy
- Future ready, profitable, sustainable
- Margins.....small...



Only few Dutch farms have a low *Break-Even*



©2020 European Dairy Farmers e.V. Cost of Production Comparison 2020

Break-Even, median

Break-Even, all subsidies and public payments factored in a non-milk return, range, 1 dot = 1 farm

TOP 25 % DAIRIES CALIFORNIA USA

- Top 25 % dairies California USA
- 2021
- 2663 cows average, yearly production → 34.7 million kg milk per year
- Average production 36 kg per day, 3.95 fat, 3.26 protein
- Small margins, losses → Top 25%

INCOME:			
	PER CWT	ECM CWT	PER COW
Milk	\$ 17.76	\$ 16.33	\$ 4,375
Risk management	0.05	0.04	11
Calves and heifers	0.24	0.22	60
Patronage dividend	0.24	0.22	59
Agricultural program payments	0.24	0.22	60
Other	0.23	0.21	57
Total income	18.76	17.24	4,622
EXPENSES:			
Feed:			
Hay, silage and farming	3.98	3.66	981
Grain	8.70	8.00	2,143
Less cost of feeding heifers	(2.41)	(2.22)	(594)
Total feed	10.27	9.44	2,530
Herd replacement cost:			
Depreciation - dairy cows	0.85	0.78	209
Loss on sale of cows	0.54	0.50	134
Total herd replacement cost	1.39	1.28	343
Other operating expenses:			
Interest and rent	0.76	0.70	186
Labor	1.50	1.38	370
Depreciation - other	0.46	0.43	114
Milk hauling	0.43	0.40	106
Industry assessments	0.20	0.18	49
Supplies	0.57	0.52	140
Manure management and environmental costs	0.05	0.04	11
Repairs and maintenance	0.56	0.52	139
Utilities	0.33	0.31	82
Taxes and licenses	0.21	0.20	53
Insurance	0.22	0.20	53
Fuel and oil	0.17	0.16	42
Professional services	0.06	0.06	16
Employee benefits	0.06	0.06	15
Veterinary and breeding	0.34	0.31	84
Testing and trimming	0.07	0.07	18
Hauling livestock	0.03	0.02	7
Miscellaneous	0.01	0.01	3
Less cost of raising heifers	(0.45)	(0.41)	(110)
Total other expenses	5.58	5.16	1,378
Total expenses	17.24	15.88	4,251
Net income before debt and draws	1.52	1.36	371
Current debt repayment and owners' draws	1.68	1.55	415
Net (loss) after debt and draws	\$ (0.16)	\$ (0.19)	\$ (44)
AVERAGE DAIRY STATISTICAL DATA:			
Average number of milking cows	2,663		
Average daily pounds per milking cow	79		
Average daily EC pounds per milking cow	86		
Average butterfat test	3.95 %		
Average protein test	3.26 %		
Average other solids test	5.78 %		
Herd turnover rate	42 %		
Net mailbox price	\$ 17.13		





Hunsingo Dairy



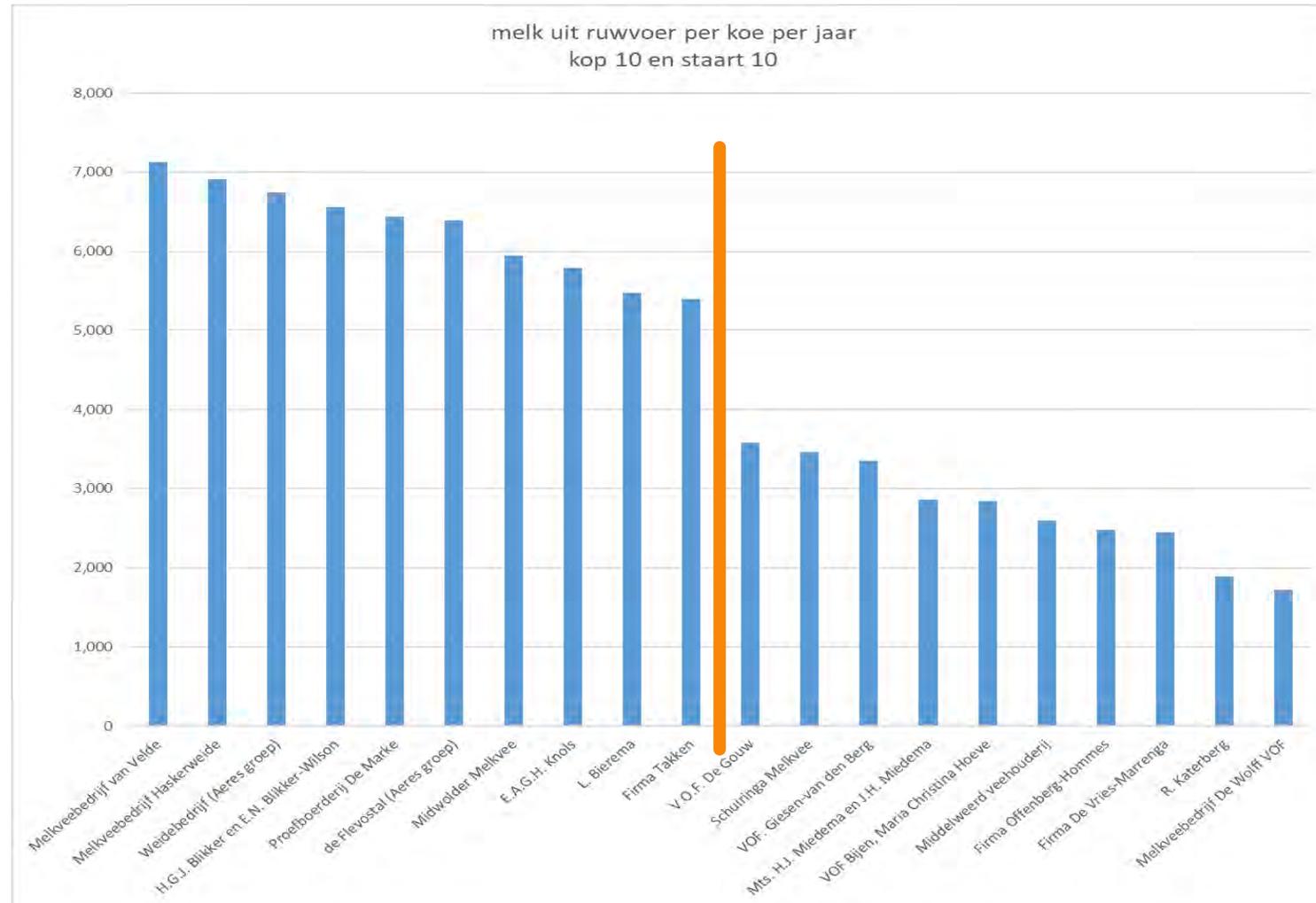


HUNSSINGO DAIRY

- Focus:
 - Fertility (healthy cows)
 - Young stock (future)
 - Roughage/forage (basis)
 - grass; grass to glass, storage CO₂, biodiversity, growing protein, circularity
 - Fine tuning manure management → NIR, new vision, new data
 - Maize for the perfect combination with top quality grass, more efficient use in the cow, less emission of ammonia
 - Innovations, fodder beets, grass/lucerne mixes, high N efficient grasses.



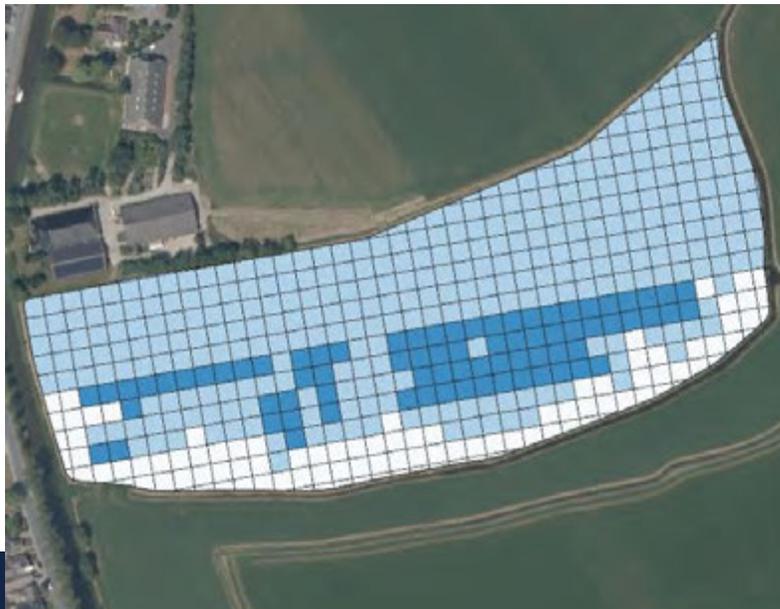
MELK UIT RUWVOER: KOP EN STAART (EDFDATA)



- OBV 450 VEM PER
KG MELK UIT
KRACHTVOER
- CORRECTIE
GEMAAKT VOOR
JV-BEZETTING

OPTIMIZING N- FERTILIZATION

- Farm quota
- Right distribution per field
- Right distribution over the season



MY FARMERS CONCLUSIONS

- Less emissions; ammonia, methane, nitrous oxide
- Maize/grass (young grass) ammonia emission/methane emission lower
- Higher feed efficiency
- Lower inputs
- Maximum utilization of inputs



Hunsingo Dairy



FUTURE.....SHORT TERM

- Healthy animals, crossbreeds.
- More milk out of roughage
- Reduce use of artificial fertilizer in the future, new technologies with manure
- Stable use of concentrate.
- High yields, fits in this region
- Better varieties of grass, maize,better silage and fresh products.
- Close cooperation with crop farmers.
- Now 68% protein own production, 75% coming years.....and more.
- “New” crops, 5-year experience with fodder beets and lucerne....beans, peas
- To work with same data from land, as we work with the cows/precision farming



Hunsingo Dairy



FUTURE.....LONG TERM

- Next generation is coming
- Telling our story
- Valorisation; market/consumer is always right
 - Non GMO/grazing...+3...longevity, antibiotic free, quality, cowfomfort...+2
 -
- Energy producer
- Manure → LelySphere, Nitrogen cracker,...
- Development; growth in size, processing, second location
- Climate neutral.





IT'S TIME TO COOPERATE, IT INSPIRES ME TO MEET ALL THE DAIRYMAN AND PEOPLE WHO ARE ACTIVE IN THE DAIRY INDUSTRY THE LAST DAYS.



CLIMATE

How dairy farmers are cashing in on California's push for cleaner fuel

February 10, 2022 · 5:07 AM ET

Heard on Morning Edition



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THANK YOU

LET'S CONNECT

GLOBAL DAIRY FARMERS





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GLOBAL DAIRY SYMPOSIUM

Madison, Wisconsin, U.S.A. | October 6, 2022

Hosted by: Wisconsin Department of Agriculture, Trade and Consumer Protection

