Maryland's Dairy Industry: 2024 Annual Report

From

The Maryland Dairy Industry Oversight and Advisory Council

October 1, 2024

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Summary

This report to Governor Wes Moore is an assessment of the current state of the dairy industry in Maryland as well as policy recommendations to support the sector. It represents the recommendations of a committee that includes milk processors, dairy farmers, dairy cooperative leaders, Maryland Farm Bureau members, Maryland Grange members, and consumers, as well as representatives from state and local health departments, the Maryland Department of Agriculture (MDA), the General Assembly, and University of Maryland officials.

The Governor's Maryland Dairy Industry Oversight and Advisory Council (Council) is charged with improving and sustaining the economic viability of Maryland's dairy industry and reporting annually to the Governor.

Dairy production is a crucial part of Maryland agriculture, providing fresh milk to processors in the state and beyond. It is particularly important in central and western Maryland counties where it is concentrated because it is a value-added product that utilizes hay, corn silage, grain, and soybean oil meal, thus increasing the importance of field crops. In 2023, Maryland dairy farms reported sales of $183.7 million. According to the University of Maryland, dairy farming requires about 200,000 acres of cropland to generate feed for the 40,000 milk cows and replacement heifers. It is unlikely that the demise of the dairy industry would be offset by other value-added agricultural enterprises and would result in a loss of agriculture in general and the associated jobs and economy.

Maryland had no cases of HPAI in dairy cattle, milk prices up, feed costs down

Maryland did not have any cases of Highly Pathogenic Avian Influenza (HPAI) H5N1 in dairy herds in 2024. However, the outbreak which began in March is now in 14 states as of this writing. HPAI spread to dairy cattle put the state's dairy sector on alert. The Maryland Department of Agriculture and the Maryland Health Department held a series of calls with the Dairy Advisory Council, veterinarians and dairy cooperatives to communicate on the issue and take precautionary measures to stop its spread. In April, MDA issued orders restricting the movement of dairy cattle into the state from states with cases of HPAI in cow herds.

The dairy economy in the state improved somewhat in 2024. As one measure, the U.S. Department of Agriculture (USDA)'s dairy risk management program (Dairy Margin Coverage) had payouts of $323,169 in 2024. In 2023, a period of significant financial stress, Maryland dairy farmers received $11.4 million, or $64,000 per enrolled dairy farm on average from DMC.

Number of Maryland dairy farms falls to 287; 505 a decade ago

The number of Maryland dairy farms continues to fall. As of the writing of this report in September 2024, the Maryland Department of Health (MDH) regulates 287 dairy farms in the state, down from 297 last year. A decade ago, there were 505 dairy farms. St. Mary's

gained a dairy farm. Washington County lost five. Broken down by county, the number of dairy farms is:

Baltimore County - 7
Caroline County - 4
Carroll County - 20
Cecil County - 29
Charles County - 3
Frederick County - 45
Garrett County - 37
Harford County - 12
Howard County - 2
Kent County - 7
Montgomery County - 3
Prince George's County - 2
Queen Anne's County - 4
St. Mary's County - 16
Talbot County - 3
Washington County - 93

Maryland's current milk processing capacity includes 44 operations (Attachment 2). There are seven large, commercial dairy processors. The rest are smaller, on-farm processors. Processors in the state annually process more than 10 billion pounds of milk, according to MDH and the Federal Milk Market Order. More than 40,000 loads of milk are hauled from farms throughout the Mid-Atlantic to Maryland processors each year. Final products of all types are shipped throughout the nation and the world from Maryland. One plant, Nestle Dreyer's Ice Cream in Laurel, is among the largest ice cream factories in the world.

Recommendations to Governor Moore and the General Assembly:

The Advisory Council recommends that Governor Wes Moore, the General Assembly, and relevant state agencies:

1. Continue to prohibit the sale of raw milk for human consumption in Maryland.
2. Promote the importance of the Maryland dairy industry to the public.
3. Oppose the marketing of plant-based beverages as 'milk.'
4. Encourage the use of flavored and full-fat milk in schools.
5. Support value-added agriculture by simplifying and reducing environmental regulatory impediments at the state and county levels.

Recommendation 1:

The Governor and the General Assembly should continue to prohibit the sale of raw milk directly to Maryland consumers for human consumption.

The Council is certain that the health risks associated with raw milk consumption are based on well-documented, sound science, and repeats its recommendation against allowing the sale of raw milk directly to consumers for public consumption. Pathogens in milk can cause very serious, sometimes life-altering conditions, and sometimes even death.

The only method proven to be reliable in reducing the level of pathogens in milk and milk products is proper pasteurization. Should raw milk be allowed for sale directly to the

consumer, MDH anticipates an increase in the number of milk-related outbreaks and will likely incur more costs and require additional staffing for the routine regulation of raw milk as well as in the investigation and control of these outbreaks.

Recommendation 2:

MDA and other state entities should promote the value and importance of the state's dairy industry to the public.

MDA's Marketing program should continue to work with Maryland Public Television's Maryland Farm & Harvest to encourage episodes on the dairy industry. Also, the state's Farm to School program should continue to celebrate dairy farming with the state's school children. Additionally, the Maryland Agricultural Education Foundation should be supported in its mission to explain agriculture to educators and school children.

Recommendation 3:

MDA should encourage the U.S. Food and Drug Administration (FDA) to ensure that plant-based beverages are not marketed as milk.

In February 2023, the FDA issued draft guidance, Attachment 3, that notes that common or usual names of plant-based beverages, such as "soy milk" and "almond milk," have been established by common usage. It also includes the FDA's draft recommendation for plant-based products that are labeled with the term "milk" in their names, such as "soy milk" or "almond milk," and that have a nutrient composition that is different than milk, include a voluntary nutrient statement that conveys how the product compares with milk.

Federal legislation, the 2023 Pride Act is currently offered as a bi-partisan attempt to prevent the marketing of plant-based beverages as milk. It is recommended that the state's leadership support this congressional legislation.

Recommendation 4:

The State of Maryland should work to increase access to flavored and full-fat milk in schools, as flavored and full fat milk is more likely to be consumed by children.

Research published in February 2020 in the academic journal, *The American Journal of Clinical Nutrition*, concludes "Observational research suggests that high cow milk fat intake is associated with lower childhood adiposity. International guidelines that recommend reduced fat milk for children may not lower the risk of childhood obesity." doi.org/10.1093/ajcn/nqz276

Recommendation 5:

The State of Maryland should support value-added agriculture by simplifying and reducing environmental regulatory impediments at the state and county levels.

Maryland dairy farmers may seek to add value to their farming operations beyond the production of milk. This is an important opportunity that should be supported by the State. For example, some farms may provide boarding for show cattle, pursue cheese or ice cream production, or wish to sell directly to consumers. All of these are viable options that should be supported.

Attachment 1

Maryland Dairy Economics

Table 1. Maryland Agriculture Enterprise Value of Production Measured in Millions of Dollars.

Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Broilers	990	931	885	1,001	971	891	669	913	1,487	1,249
Corn grain	285	242	246	282	228	318	373	475	423	356
Soybeans	228	188	199	232	199	175	254	365	298	272
Dairy milk production	246	173	156	169	149	153	152	157	214	185
Beef cattle	104	99	82	63	72	96	67	87	93	96
Hay	91	93	93	78	91	80	68	67	71	89
Wheat	86	79	67	60	62	61	62	93	105	84
Egg production	71	99	31	44	61	33	40	37	93	104
Hogs	10	7	6	6	7	6	6	8	8	7

Dale M. Johnson
September 2024
Department of Agricultural and Resource Economics, University of Maryland

Introduction

Dairy production is a significant agriculture enterprise in Maryland generating an annual average gross milk income of approximately $175 million over the ten years 2014-2023. The relative importance of the dairy industry can be seen when comparing it to the value of production of other Maryland agricultural enterprises in Table 1.

Dairy production is particularly important in central and western Maryland counties where it is concentrated because it is a value-added product that utilizes corn grain/silage, soybean meal, and hay. This increases the importance of those field crops that generate open space. It requires about 200,000 acres of cropland to generate feed for the ~40,000 milk cows and replacement heifers. It is unlikely that the demise of the dairy industry would be offset by other value-added agricultural enterprises and would result in a loss of agriculture diversity and the associated jobs and economy. However, dairy production is contracting. Since 2014, about 155 of the 455 dairy farms (34 percent) have ceased

operation. Table 2. details the statistics of the Maryland dairy industry. Some of the cows from these farms are picked up by other Maryland farms as the average size of farm has gone from 110 cows to 133 cows. But the number of cows over this time period has declined from 50,000 to 40,000. The gross income from milk is highly variable because the wide swing in milk prices from $16.20 per hundredweight to $25.60 per hundredweight.

Long term decline of dairy farms

There has been a long-term decline in the number of Maryland dairy farms as seen in figure 1.

Figure 1. Number of Maryland Dairy Farms by Year

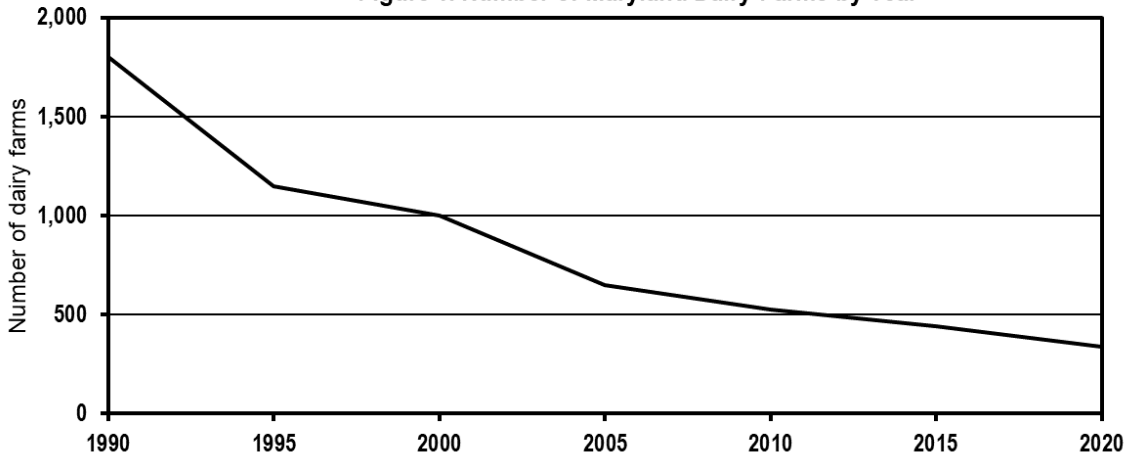


Table 2. 2014-2023 Dairy statistics

Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Number or Dairy farms	455	443	424	411	381	348	339	325	310	300
Cows per farm	110	111	113	117	118	124	124	125	132	133
Total number of cows	50,000	49,000	48,000	48,000	45,000	43,000	42,000	42,000	41,000	40,000
Total lbs milk per cow	19,820	20,143	20,021	19,917	20,556	19,535	20,976	20,857	20,537	21,150
Total lbs milk production	991,000,000	987,000,000	961,000,000	956,000,000	925,000,000	840,000,000	881,000,000	876,000,000	842,000,000	846,000,000
Lbs fed to calves	600,000	6,000,000	7,000,000	7,000,000	7,000,000	7,000,000	7,000,000	7,000,000	7,000,000	7,000,000
Milk home consumption	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Pounds of milk sold	984,000,000	980,000,000	953,000,000	948,000,000	917,000,000	832,000,000	873,000,000	868,000,000	834,000,000	838,000,000
Prices received/cwt (1)	$25.00	$17.60	$16.40	$17.80	$16.20	$18.40	$17.40	$18.10	$25.60	$21.90
Gross income (2)	$246,250,000	$172,656,000	$156,456,000	$168,922,000	$148,716,000	$153,272,000	$152,076,000	$157,289,000	$213,760,000	$183,741,000
Value of milk produced (3)	$247,750,000	$173,712,000	$157,604,000	$170,168,000	$149,850,000	$154,560,000	$153,294,000	$158,556,000	$215,552,000	$185,274,000

USDA National Agricultural Statistics Service, Maryland Department of Agriculture

(1) Prices received for all milk sold wholesale per cwt.

(2) Includes value of milk used for home consumption

(3) includes value of milk fed to calves

This trend mirrors the decline in the number of dairy farms in the United States. Table 3 shows the number of dairy farms declining from a total of 155,339 in 1992 to 24,082 in 2022, as reported in the USDA Census of Agriculture. Most of the farms exiting were small farms with less than 200 cows. As small farms go out of business, the cows are absorbed by large farms which can be seen in Table 4. In 1992, 68.4 percent of the cows resided on farms with less than 200 cows. In 2022, 64.8 percent of the cows resided on farms with 1,000 cows or more.

The main reason for this shift in milk production from small farms to large farms lies in increased profitability on large farms. Figure 2 illustrates the net return by herd size from 2005-2018. In only two of the years (2007 & 2014) did farms with less than 500 cows break even. These are average returns in each herd size. There is variability within the herd sizes, so some farms within a herd size have higher net returns than other farms within the herd size. Some small farms may consistently show profits from efficient production, while most small farms generate losses, which are reflected in the loss of small farms as shown above. The decline of dairy farms in Maryland is largely due to the size structure.

Table 3. United States
Number of Dairy Farms by Herd Size

Herd size	1992	2022
1-199	148,993	16,960
200-499	4,652	3,671
500-999	1,130	1,438
>999	564	2,013
Total	155,339	24,082

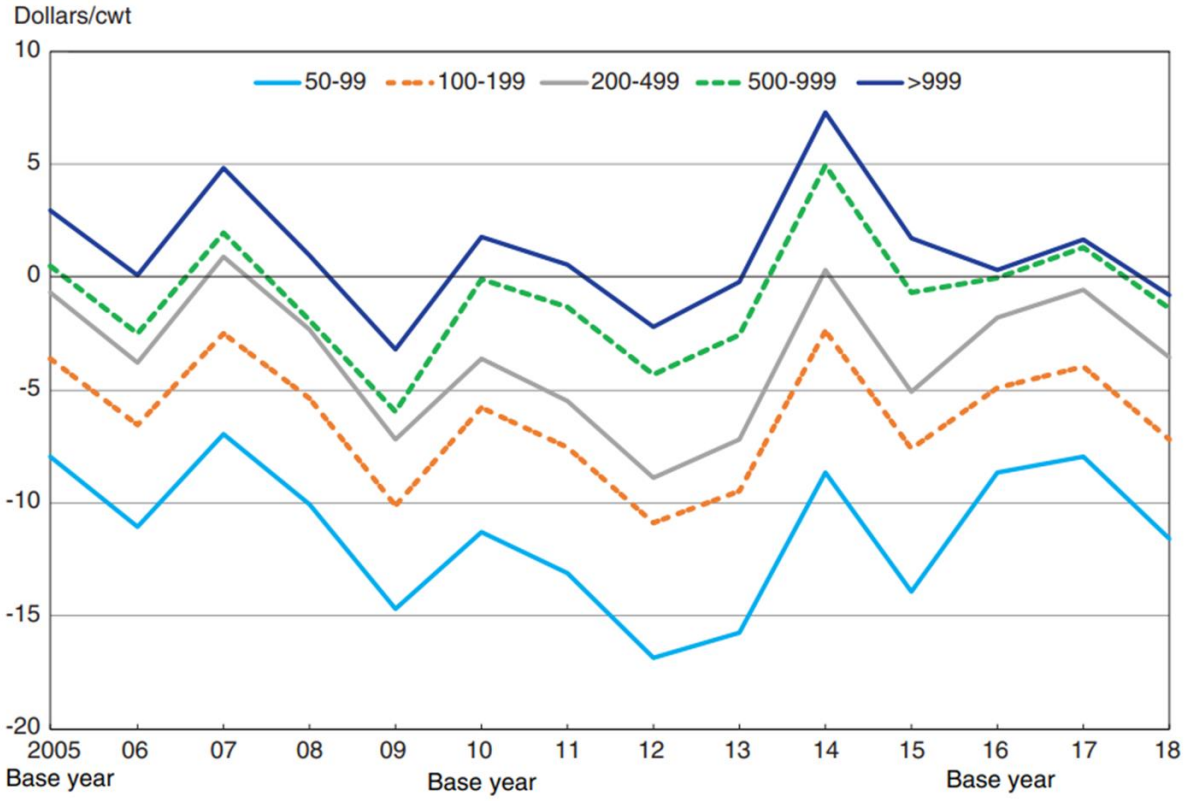
Source: USDA Census of Agriculture

Table 4. United States
Percent of cow inventory

Herd size	1992	2022
1-199	68.4	12.6
200-499	13.7	12.3
500-999	8.0	10.3
>999	9.9	64.8
Total	100	100

Figure 2.

Net returns by herd size, 2005-2018



Consolidation in U.S. Dairy Farming, James M. MacDonald, Jonathan Law, and Roberto Mosheim, USDA ERS

Milk prices

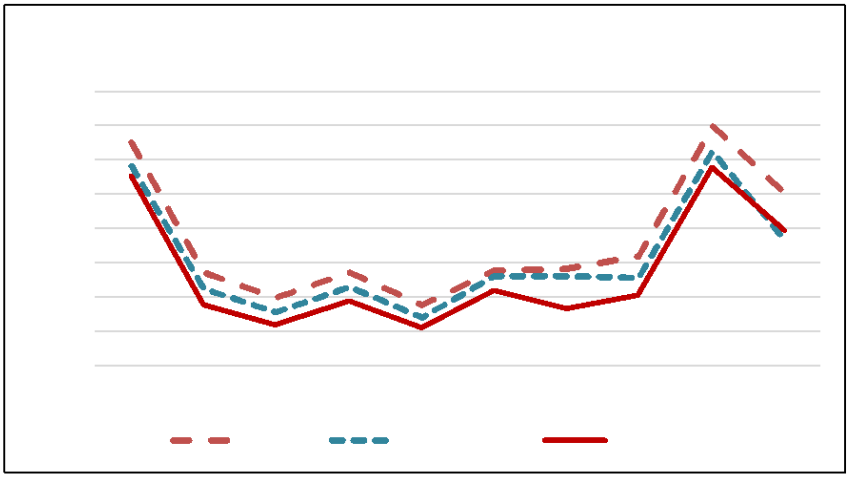
Variable milk prices put considerable pressures on dairy farms. Disregarding the high milk price years of 2014 and 2022 (see table 1), the average price over the remaining eight years is $17.97 as national supply has outpaced demand. Costs of production on Maryland farms are about $20 per cwt (Johnson, University of Maryland) which does not include family living withdrawals, principal payments on loans, or major capital improvements. Dairy farmers must try to make up the difference with cull and calf sales, crop sales, federal payments, and other miscellaneous income.

It is even more revealing to look at regional milk prices. Table 5 and its associated graph show average milk prices per hundredweight for Virginia, Pennsylvania, and Maryland from 2014-2023. The average Maryland price over this period is $1.89 per cwt below Virginia price and $0.80 per hundredweight below the Pennsylvania price. Milk pricing structures in Virginia and Pennsylvania have given dairy farmers in those states an advantage over Maryland farmers.

Table 5. Average Milk Price Per CWT by Year

State/Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Average
Virgina	$26.97	$19.46	$18.03	$19.46	$17.57	$19.60	$19.70	$20.40	$28.00	$24.10	$ 21.33
Pennsylvania	$25.62	$18.48	$17.16	$18.66	$16.87	$19.28	$19.28	$19.10	$26.50	$21.40	$ 20.24
Maryland	$25.00	$17.60	$16.40	$17.80	$16.20	$18.40	$17.40	$18.10	$25.60	$21.90	$ 19.44

USDA National Agricultural Statistics Service



Feed prices

Feed is one of the main costs of producing milk, whether it is the opportunity cost of farm-produced feeds or the actual costs of purchasing feed. Table 6 shows the national average prices for the two main ingredients in dairy feed concentrates, corn and soybeans. Except for the marketing years of 21/22 and 22/23, corn and soybean prices have been favorable for dairy farmers. Analysts of the dairy farm sector began to place more attention on the threat of high feed costs. Dairy subsidy programs, which for decades had operated with the intention of keeping milk prices high, were modified to

Table 6. Average Corn and Soybean Price by Marketing Year

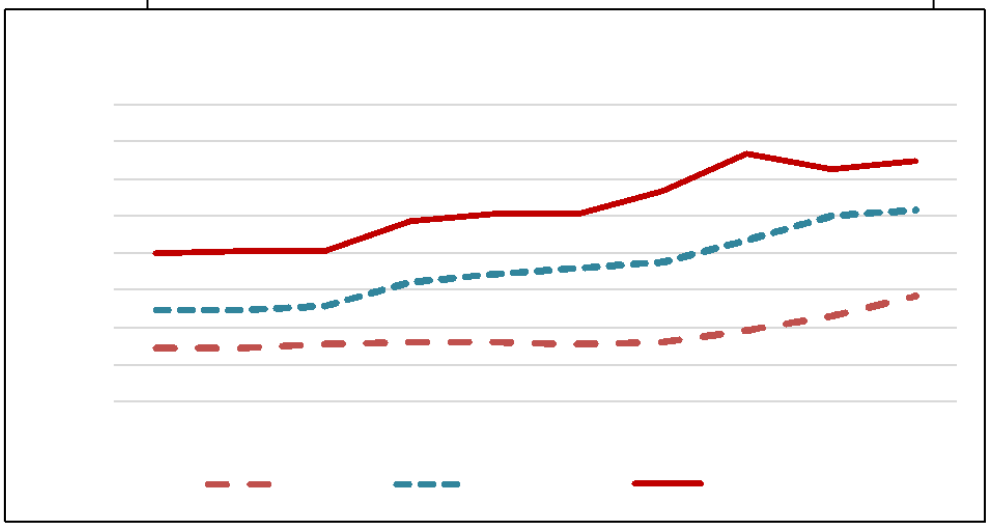
Marketing year*	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	Average
Corn	$3.61	$3.36	$3.36	$3.61	$3.56	$4.53	$6.00	$6.54	$4.75	$4.10	$4.34
Soybeans	$8.95	$9.47	$9.33	$8.48	$8.57	$10.80	$13.30	$14.20	$12.65	$10.80	$10.66

USDA World Agriculture Demand and Supply Estimates *Marketing year is September 1 - August 31

Table 7. Price of land including buildings per acre for Maryland, Pennsylvania, and Virginia

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Average
Virginia		4,440	4,470	4,590	4,620	4,620	4,550	4,600	4,950	5,300	5,850	4,799
Pennsylvania	5600	5,500	5,500	5,600	6,250	6,470	6,600	6,800	7,350	8,020	8,160	6,625
Maryland	6900	7,000	7,060	7,060	7,860	8,060	8,080	8,670	9,700	9,260	9,470	8,222

USDA National Agricultural Statistics Service



make payments based on a combination of relatively low milk prices and relatively high feed prices.

Land Prices

Other economics work to the detriment of Maryland dairy farms. The price of farmland and buildings in Maryland is much higher than in Pennsylvania and Virginia as illustrated in Table 7 and its associated graph. While higher land values increase a farm owner's net worth and provide more collateral to borrow against, it makes it more difficult to buy additional land to expand operations. It also makes it almost impossible for young farmers to get into dairy farming since a dairy operation cannot economically justify those land values inflated from development encroachment in a rapidly urbanizing state.

Other obstacles facing Maryland dairy farms

Other obstacles confront Maryland dairy farms, including the following:

- Competition from broiler production on the Eastern Shore.
- Fractured land from topography & development.
- Dwindling agriculture and dairy industry infrastructure.

- Regulations.
- Good alternative jobs for successive generations.

Farm Level Economics

From 1994 -2021, Dale Johnson collected farm-level data on income and expenses from Maryland dairy farmers. This was done through farm visits so that Johnson did not have to take possession of confidential, personal, tax, and accounting information. This typically occurred from March to May after taxes had been filed and before farmers began work in the fields.

The table below illustrates the income, expenses, and profit per hundred pounds (CWT) of milk produced by 25 dairy farms (18 non-organic and 7 organic) for the years 2018-2020. The average cost of production for non-organic farms for the years 2018-2020 is $20.41 per cwt (line 19). This does not include operator & family labor (family living) and debt principal payments. The average milk price per cwt for the same time period is $17.46 (line 4). This is $2.95 below the cost of production. While farmers have cattle sales and other income which help return a profit, the profit is inadequate for many farms. For example, the average total profit per farm is $56,809 (line 21). Out of this profit, farmers must extract family living (often more than one family) and debt principal payments (land, equipment, livestock, and operating debt), which often results in a negative cash flow. There is a wide variability in farm financial performance, and some farms are worse off than others. The third column under non-organic farms shows that the least profitable nine non-organic farms have a higher cost of production of $21.15/CWT (line 19) than average and lower income than an average of $21.84/CWT (line 7). They barely break even at $0.70/CWT (line 20) or $15,755/farm (line 21) before family living and debt principal payments are extracted.

The economics of organic farms are very different. Organic farms tend to be smaller at 86 cows compared to 134 (line 1). The production per cow is lower at 90 CWT/cow compared to 207 CWT/cow (line 2) because of several factors, including cattle breed and feeding systems that rely primarily on pasture. Milk price is higher at $33.80/CWT compared to $17.46/CWT (line 4). Costs are also higher at $31.69/CWT compared to 20.41/CWT (line 19). Profit per CWT is higher at $9.48/CWT compared to $2.05/CWT (line 20). During this period, the seven organic farms did much better than the average non-organic farms. In comparing profit per farm, the organic farms' average profit per farm of $75,777 was much higher than the average profit for non-organ farms of $56,809 (line 21). However, organic production is not an option for most dairy farms. Most organic cooperatives do not take on new farms. Some organic cooperatives have limited the amount of milk they pay the organic price on.

	2018-2020 Average of Maryland Dairy Farms	Conventional (Non-Organic) Farms			Organic
	Income, Expenses, and Profit per CWT	Total 18 Farms	High 9 Farms	Low 9 farms	7 Farms
1	Average number of cows	134	158	112	86
2	CWT of milk sold per cow	207	212	201	90
3	**Farm income**				
4	Milk sales	17.46	17.84	16.97	33.80
5	Cattle sales	1.23	1.11	1.39	3.56
6	Other income	3.77	3.99	3.49	4.12
7	Total income	22.46	22.94	21.84	41.48
8	**Farm expenses**				
9	Feed purchased	5.81	5.58	6.12	10.40
10	Seed, fertilizer, chemicals	2.17	2.32	1.96	2.02
11	Depreciation and repairs	3.17	3.39	2.88	6.40
12	Labor	0.84	0.80	0.89	0.62
13	Medical and breeding	0.92	0.75	1.14	0.51
14	Car, Truck, Fuel, Hauling	1.92	1.95	1.88	2.29
15	Rent	1.01	0.98	1.05	1.62
16	Interest	0.75	0.62	0.93	1.10
17	Custom hire	1.32	1.15	1.55	1.90
18	Other expenses	2.49	2.31	2.73	4.83
19	Total Expenses	20.41	19.85	21.15	31.69
20	Profit per CWT	2.05	3.08	0.70	9.79
21	Net profit per farm	56,809	102,996	15,755	75,777

Attachment 2

Maryland Dairy Processors

County	Entity Name	City	Large	On-Farm	
BaltCity	ATWATER'S	BALTIMORE			
Prince Georges	BIONATFOODS	BELTSVILLE			
Harford	BROOMS BLOOM DAIRY	BEL AIR		X	
Harford	BROOMS BLOOM DAIRY - FD PROCESSING	BEL AIR		X	
Garrett	CASSELMAN CREAMERY	GRANTSVILLE			
Talbot	CHAPELS COUNTRY CREAMERY	EASTON		X	
Washington	CHEESE GOATEES	HAGERSTOWN		X	
Worcester	CHESAPEAKE BAY DAIRY	POCOMOKE			
Washington	CLEAR SPRING CREAMERY	CLEAR SPRING			X
Saint Marys	CLOVER HILL DAIRY	MECHANICSVILLE			
Baltimore City	CLOVERLAND FARMS DAIRY	BALTIMORE	X		
Frederick	DAIRY MAID DAIRY LLC	FREDERICK	X		

Washington	DELITEFUL DAIRY	WILLIAMSPORT				X
Howard	DREYERS GRAND ICE CREAM	LAUREL	X			
Worcester	DUMSERS DAIRYLAND INC	OCEAN CITY				
Garrett	FIREFLY FARMS INC	ACCIDENT				
Baltimore City	FRUMEX PALETAS LLC	BALTIMORE				
Montgomery	GEMMA GELATO	ROCKVILLE				
Frederick	GLAMOURVIEW CREAMERY	Walkersville			X	
Baltimore City	GOOD KARMA CREAMERY	BALTIMORE				
Garrett	HIGH COUNTRY FARM PRODUCTIONS LLC	GRANTSVILLE				
Worcester	ISLAND CREAMERY BERLIN	BERLIN				
Prince Georges	ITALIAN KITCHEN LTD	BLADENSBURG				
Harford	KEYES CREAMERY	ABERDEEN				
Garrett	LAKESIDE CREAMERY	OAKLAND				
Washington	LANCO DAIRY FARMS COOP LLC	HANCOCK	X			

Prince Georges	MARVA MAID / MAOLA LANDOVER	LANDOVER	X			
Howard	MARYLAND & VIRGINIA MILK PRODUCERS	LAUREL	X			
Allegany	MEADOW MOUNTAIN NUTRITIONAL INC	FROSTBURG				
Washington	MISTY MEADOW FARM CREAMERY	SMITHSBURG			X	
Prince Georges	MOBY DICK HOUSE OF KABOB	HYATTSVILLE				
Caroline	NICE FARMS CREAMERY	FEDERALSBURG				X
Anne Arundel	OLMO BROS NURSERY & FARM	ANNAPOLIS				
Prince Georges	P A BOWEN FARMSTEAD LLC	BRANDYWINE			X	
Baltimore	PITANGO PLANT	GLEN ARM				
Worcester	POPCE'S HOMEMADE ICE CREAM	OCEAN PINES				
MoCo	POTOMAC ICE CREAM LLC	GAITHERSBURG				
Baltimore	PRIGEL FAMILY CREAMERY	GLEN ARM				
Allegany	QUEEN CITY CREAMERY PRODUCTION	CUMBERLAND				

MoCo	SACRED MOUNTAIN LLC DBA MOORENKO'S ICE CREAM	SILVER SPRING				
Frederick	SAPUTO CHEESE USA	FREDERICK	X			
Frederick	SOUTH MOUNTAIN CREAMERY	MIDDLETOWN		X		
Baltimore City	TAHARKA BROTHERS	BALTIMORE				
Baltimore City	THE CHARMERY ICE CREAM	BALTIMORE				
Talbot	THE SCOTTISH HIGHLAND CREAMERY	OXFORD				
Prince Georges	TITO'S ICE CREAM	HYATTSVILLE				
Baltimore	TOTALLY COOL INC	OWINGS MILLS				
Carroll	WHISPERING BREEZE FARM CREAMERY	TANEYTOWN				X
MoCo	WOODBOURNE CREAMERY	MOUNT AIRY				X
Prince Georges	YORK CASTLE ICE CREAM CO INC	BELTSVILLE				