

IDFA_Fluid

Current run (last updated Mar 28, 2019 8:24am)

8

Polls

28

Participants

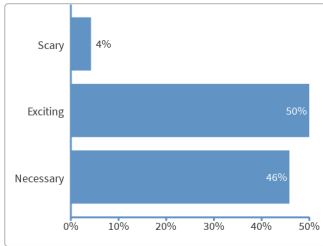
47

Average responses



Average engagement

Change is



Response options	Count	Percentage
Scary	1	4%
Exciting	12	50%
Necessary	11	46%

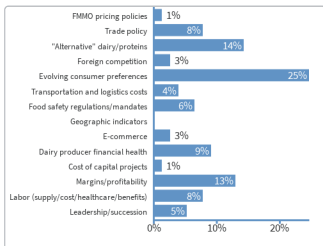


Engagement

24

Responses

What do you see as the biggest threat to your organization in the next three years? Answer up to 3x



Response options	Count	Percentage
FMMO pricing policies	1	1%
Trade policy	6	8%
"Alternative" dairy/proteins	11	14%
Foreign competition	2	3%
Evolving consumer preferences	19	25%
Transportation and logistics costs	3	4%
Food safety regulations/mandates	5	6%
Geographic indicators	0	0%
E-commerce	2	3%
Dairy producer financial health	7	9%
Cost of capital projects	1	1%
Margins/profitability	10	13%
Labor (supply/cost/healthcare/benefits)	6	8%
Leadership/succession	4	5%

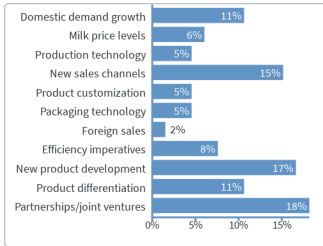


Engagement

77

Responses

What do you see as the biggest opportunity for your organization in the next three years? Answer up to 3x.



Response options	Count	Percentage
Domestic demand growth	7	11%
Milk price levels	4	6%
Production technology	3	5%
New sales channels	10	15%
Product customization	3	5%
Packaging technology	3	5%
Foreign sales	1	2%
Efficiency imperatives	5	8%
New product development	11	17%
Product differentiation	7	11%
Partnerships/joint ventures	12	18%

86% Engagement

66 Responses

Can you share one example of where you believe IDFA has particularly helped your organization in the past three years?



Responses

Export	Labeling	Trade	Farm bill	Communication of industry issues
Legislative and Regulatory contacts.	Regulation	Labeling	Milk pricing reform	
Labeling	Industry voice	Networking	Inspections	Regulatory
Regulations	Regs	REG and Labeling	Milk pricing reform	Networking
Voice of industry	International trade negotiations	Networking	Milk purchases	
Advocacy	Export	Lobbying	Labeling reg	Regs
Farm Bill	labeling			
Labeling regs				

79% Engagement

32 Responses

What is the number one reason you are a member of IDFA?



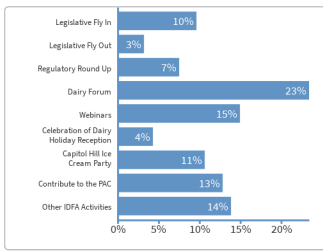
Responses

Regulatory	Networking	Information	Lobbying	Advocacy	Networking
Industry	Lobbying	For things I cannot do alone	Networking	Networking	
Support	Networking	Networking	Networking	advocacy	Support Industry
Policy and regulatory information	Industry knowledge	Access	Knowledge		
Policy	Networking	Networking	Regulatory communication	Labeling	
Advocacy	Lobbying	Networking			

82% Engagement

29 Responses

In which of the following have you participated?



Response options	Count	Percentage
Legislative Fly In	9	10%
Legislative Fly Out	3	3%
Regulatory Round Up	7	7%
Dairy Forum	22	23%
Webinars	14	15%
Celebration of Dairy Holiday Reception	4	4%
Capitol Hill Ice Cream Party	10	11%
Contribute to the PAC	12	13%
Other IDFA Activities	13	14%



94
Responses

What is the one thing that board members can do to be change agents for this industry segment?

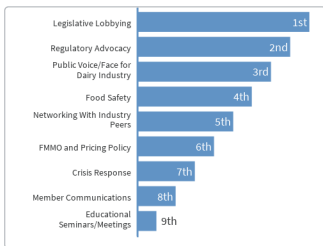


- Responses
- Advocate Collaborate
 - Be engaged; be a constant learner; be collaborative; place industry interests first
 - Collaboration Advocate for Industry Issues in our home areas.
 - Support and participate Educate Network Engaged Advocacy Fly outs
 - Engaged Collaboration Challenge the status quo Align Challenge
 - Drink more milk ! Fly-ins Be committed to be involved Be engaged
 - Be informed Engage the process Disruptive Recruit Committees
 - Be open and more collaborative Speak up New members



28
Responses

1. Where do you see IDFA as most valuable for your organization? Please rank in order of most value to least value...



Response options	Rank
Legislative Lobbying	1st
Regulatory Advocacy	2nd
Public Voice/Face for Dairy Industry	3rd
Food Safety	4th
Networking With Industry Peers	5th
FMMO and Pricing Policy	6th
Crisis Response	7th
Member Communications	8th
Educational Seminars/Meetings	9th



23
Responses

IDFA_Ice Cream

Current run (last updated Mar 28, 2019 7:58am)

8

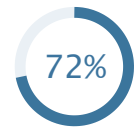
Polls

22

Participants

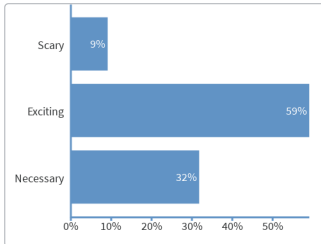
27

Average responses



Average engagement

Change is



Response options	Count	Percentage
Scary	2	9%
Exciting	13	59%
Necessary	7	32%

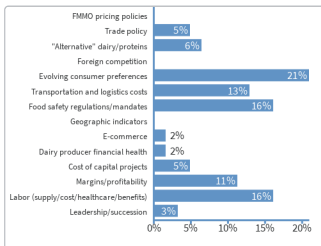


Engagement

22

Responses

What do you see as the biggest threat to your organization in the next three years? Answer up to 3x



Response options	Count	Percentage
FMMO pricing policies	0	0%
Trade policy	3	5%
"Alternative" dairy/proteins	4	6%
Foreign competition	0	0%
Evolving consumer preferences	13	21%
Transportation and logistics costs	8	13%
Food safety regulations/mandates	10	16%
Geographic indicators	0	0%
E-commerce	1	2%
Dairy producer financial health	1	2%
Cost of capital projects	3	5%
Margins/profitability	7	11%
Labor (supply/cost/healthcare/benefits)	10	16%
Leadership/succession	2	3%

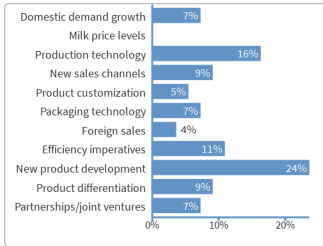


Engagement

62

Responses

What do you see as the biggest opportunity for your organization in the next three years? Answer up to 3x.

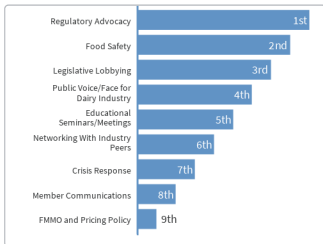


Response options	Count	Percentage
Domestic demand growth	4	7%
Milk price levels	0	0%
Production technology	9	16%
New sales channels	5	9%
Product customization	3	5%
Packaging technology	4	7%
Foreign sales	2	4%
Efficiency imperatives	6	11%
New product development	13	24%
Product differentiation	5	9%
Partnerships/joint ventures	4	7%

91% Engagement

55 Responses

1. Where do you see IDFA as most valuable for your organization? Please rank in order of most value to least value...



Response options	Rank
Regulatory Advocacy	1st
Food Safety	2nd
Legislative Lobbying	3rd
Public Voice/Face for Dairy Industry	4th
Educational Seminars/Meetings	5th
Networking With Industry Peers	6th
Crisis Response	7th
Member Communications	8th
FMMO and Pricing Policy	9th

55% Engagement

12 Responses

Can you share one example of where you believe IDFA has particularly helped your organization in the past three years?



Responses

Food safety	Representation	Labeling	Advocate	Regulatory	Advocacy	
Regulatory	Advocacy	Food safety	Legislative	Advice	Networking	Safety
Regulatory	"Food safety"	Knowledge	Trade	Regulatory	waste	
Regulatory	Education	Industry Consultant	Support	Safety		

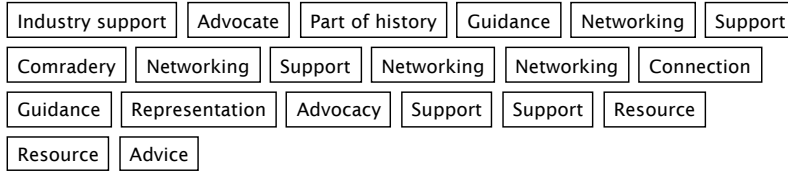
77% Engagement

24 Responses

What is the number one reason you are a member of IDFA?



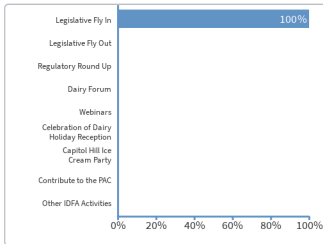
Responses



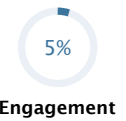
Engagement

20 Responses

In which of the following have you participated?



Response options	Count	Percentage
Legislative Fly In	1	100%
Legislative Fly Out	0	0%
Regulatory Round Up	0	0%
Dairy Forum	0	0%
Webinars	0	0%
Celebration of Dairy Holiday Reception	0	0%
Capitol Hill Ice Cream Party	0	0%
Contribute to the PAC	0	0%
Other IDFA Activities	0	0%



Engagement

1 Response

What is the one thing that board members can do to be change agents for this industry segment?



Responses



Engagement

18 Responses

IDFA_Cheese

Current run (last updated Mar 28, 2019 7:59am)

7

Polls

38

Participants

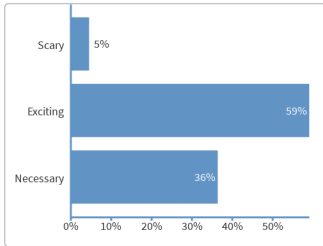
44

Average responses



Average engagement

Change is



Response options	Count	Percentage
Scary	1	5%
Exciting	13	59%
Necessary	8	36%

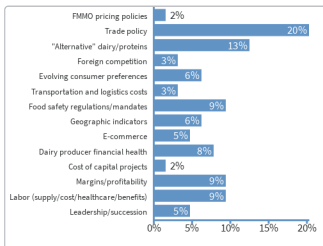


Engagement

22

Responses

What do you see as the biggest threat to your organization in the next three years? Answer up to 3x



Response options	Count	Percentage
FMMO pricing policies	1	2%
Trade policy	13	20%
"Alternative" dairy/proteins	8	13%
Foreign competition	2	3%
Evolving consumer preferences	4	6%
Transportation and logistics costs	2	3%
Food safety regulations/mandates	6	9%
Geographic indicators	4	6%
E-commerce	3	5%
Dairy producer financial health	5	8%
Cost of capital projects	1	2%
Margins/profitability	6	9%
Labor (supply/cost/healthcare/benefits)	6	9%
Leadership/succession	3	5%

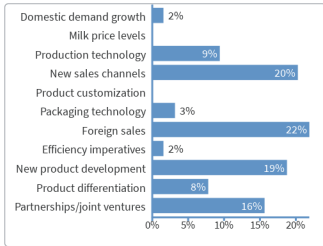


Engagement

64

Responses

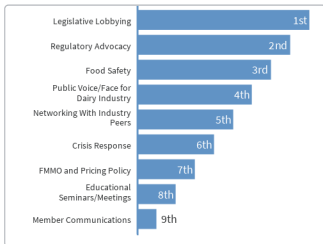
What do you see as the biggest opportunity for your organization in the next three years? Answer up to 3x.



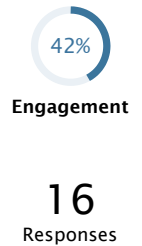
Response options	Count	Percentage
Domestic demand growth	1	2%
Milk price levels	0	0%
Production technology	6	9%
New sales channels	13	20%
Product customization	0	0%
Packaging technology	2	3%
Foreign sales	14	22%
Efficiency imperatives	1	2%
New product development	12	19%
Product differentiation	5	8%
Partnerships/joint ventures	10	16%



1. Where do you see IDFA as most valuable for your organization? Please rank in order of most value to least value...



Response options	Rank
Legislative Lobbying	1st
Regulatory Advocacy	2nd
Food Safety	3rd
Public Voice/Face for Dairy Industry	4th
Networking With Industry Peers	5th
Crisis Response	6th
FMMO and Pricing Policy	7th
Educational Seminars/Meetings	7th
Member Communications	9th



Can you share one example of where you believe IDFA has particularly helped your organization in the past three years?



Responses

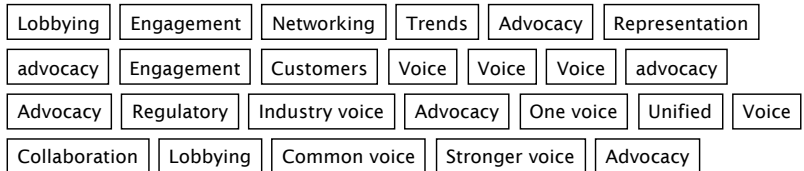
Regulatory	connected	Networking	Advocacy	Together	Unified messaging
Trade	Regulatory	Lobbying	Industry voice	Networking	Networking
Lobbying	Unified voice	Regulatory	Lobbying	Regulatory advocacy	
"facetime" with key govt officials	Lobbying	Trade	United	Regulations	
Voice	Lobbying				



What is the number one reason you are a member of IDFA?



Responses

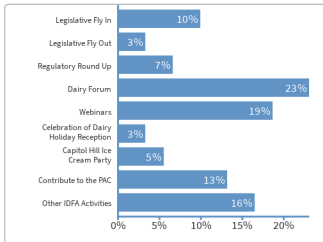


Engagement

25

Responses

In which of the following have you participated?



Response options	Count	Percentage
Legislative Fly In	9	10%
Legislative Fly Out	3	3%
Regulatory Round Up	6	7%
Dairy Forum	21	23%
Webinars	17	19%
Celebration of Dairy Holiday Reception	3	3%
Capitol Hill Ice Cream Party	5	5%
Contribute to the PAC	12	13%
Other IDFA Activities	15	16%



Engagement

91

Responses

IDFA_Yogurt

Current run (last updated Mar 28, 2019 8:00am)

7

Polls

15

Participants

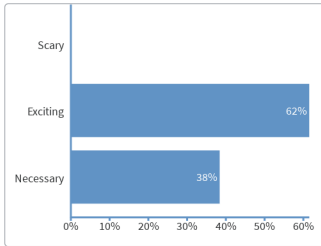
17

Average responses



Average engagement

Change is



Response options	Count	Percentage
Scary	0	0%
Exciting	8	62%
Necessary	5	38%

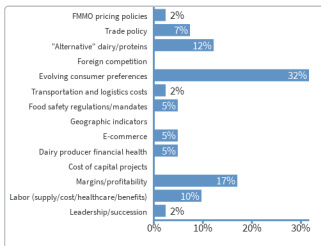


Engagement

13

Responses

What do you see as the biggest threat to your organization in the next three years? Answer up to 3x



Response options	Count	Percentage
FMMO pricing policies	1	2%
Trade policy	3	7%
"Alternative" dairy/proteins	5	12%
Foreign competition	0	0%
Evolving consumer preferences	13	32%
Transportation and logistics costs	1	2%
Food safety regulations/mandates	2	5%
Geographic indicators	0	0%
E-commerce	2	5%
Dairy producer financial health	2	5%
Cost of capital projects	0	0%
Margins/profitability	7	17%
Labor (supply/cost/healthcare/benefits)	4	10%
Leadership/succession	1	2%

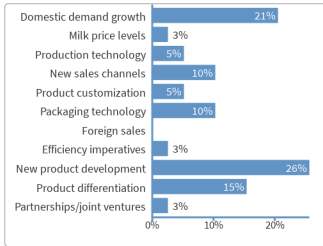


Engagement

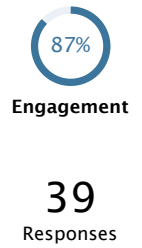
41

Responses

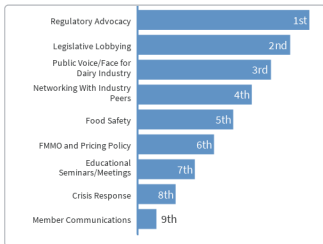
What do you see as the biggest opportunity for your organization in the next three years? Answer up to 3x.



Response options	Count	Percentage
Domestic demand growth	8	21%
Milk price levels	1	3%
Production technology	2	5%
New sales channels	4	10%
Product customization	2	5%
Packaging technology	4	10%
Foreign sales	0	0%
Efficiency imperatives	1	3%
New product development	10	26%
Product differentiation	6	15%
Partnerships/joint ventures	1	3%



1. Where do you see IDFA as most valuable for your organization? Please rank in order of most value to least value...



Response options	Rank
Regulatory Advocacy	1st
Legislative Lobbying	2nd
Public Voice/Face for Dairy Industry	3rd
Networking With Industry Peers	4th
Food Safety	5th
FMMO and Pricing Policy	6th
Educational Seminars/Meetings	6th
Crisis Response	8th
Member Communications	9th

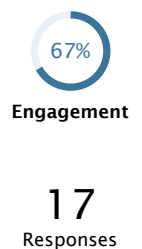


Can you share one example of where you believe IDFA has particularly helped your organization in the past three years?



Responses

Advocacy	Regulatory	labeling	International trade	Networking	networking	
Labeling	Networking	Advocacy	Labeling	Regulatory	Networking	NCIMS
Trends	Labeling	Regulatory	Yogurt SOI			



What is the one thing that board members can do to be change agents for this industry segment?



Responses



Engagement

0

Responses

In which of the following have you participated?



Response options

Count

Percentage

Legislative Fly In

0

0%

Legislative Fly Out

0

0%

Regulatory Round Up

0

0%

Dairy Forum

0

0%

Webinars

0

0%

Celebration of Dairy Holiday Reception

0

0%

Capitol Hill Ice Cream Party

0

0%

Contribute to the PAC

0

0%

Other IDFA Activities

0

0%



Engagement

0

Responses

IDFA_Ingredients

Current run (last updated Mar 28, 2019 8:01am)

7

Polls

18

Participants

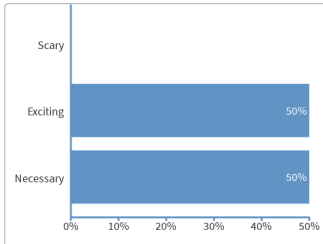
38

Average responses



Average engagement

Change is



Response options

Scary

Exciting

Necessary

Count

0

8

8

Percentage

0%

50%

50%

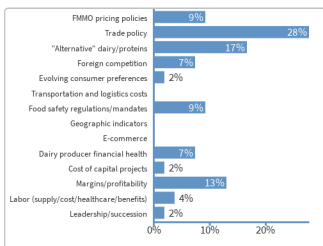


Engagement

16

Responses

What do you see as the biggest threat to your organization in the next three years? Answer up to 3x



Response options

FMMO pricing policies

Trade policy

"Alternative" dairy/proteins

Foreign competition

Evolving consumer preferences

Transportation and logistics costs

Food safety regulations/mandates

Geographic indicators

E-commerce

Dairy producer financial health

Cost of capital projects

Margins/profitability

Labor (supply/cost/healthcare/benefits)

Leadership/succession

Count

5

15

9

4

1

0

5

0

0

4

1

7

2

1

Percentage

9%

28%

17%

7%

2%

0%

9%

0%

0%

7%

2%

13%

4%

2%

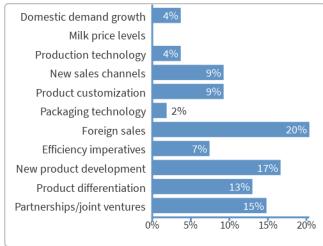


Engagement

54

Responses

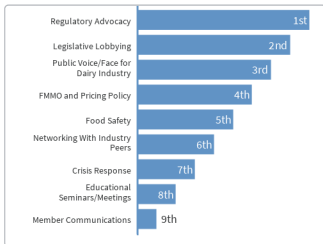
What do you see as the biggest opportunity for your organization in the next three years? Answer up to 3x.



Response options	Count	Percentage
Domestic demand growth	2	4%
Milk price levels	0	0%
Production technology	2	4%
New sales channels	5	9%
Product customization	5	9%
Packaging technology	1	2%
Foreign sales	11	20%
Efficiency imperatives	4	7%
New product development	9	17%
Product differentiation	7	13%
Partnerships/joint ventures	8	15%

100% Engagement
54 Responses

1. Where do you see IDFA as most valuable for your organization? Please rank in order of most value to least value...



Response options	Rank
Regulatory Advocacy	1st
Legislative Lobbying	2nd
Public Voice/Face for Dairy Industry	3rd
FMMO and Pricing Policy	4th
Food Safety	5th
Networking With Industry Peers	6th
Crisis Response	7th
Educational Seminars/Meetings	8th
Member Communications	9th

100% Engagement
18 Responses

Can you share one example of where you believe IDFA has particularly helped your organization in the past three years?

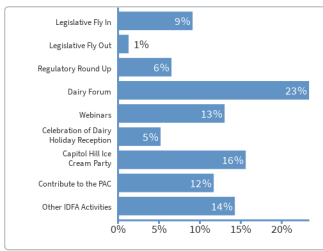


Responses

Consolidation	Lobbying	Industry alignment	advocacy	Networking	Trade
Collective dairy voice	As a lobbying entity	Regulatory	Trade advocacy		
Advocacy	lobbying	Crisis response	Networking	USMCA-lobbying	
Regulatory	Labelling	Networking	Regulatory	Voice	Networking
Labeling	Lobbying	Lobbying			

100% Engagement
24 Responses

In which of the following have you participated?



Response options	Count	Percentage
Legislative Fly In	7	9%
Legislative Fly Out	1	1%
Regulatory Round Up	5	6%
Dairy Forum	18	23%
Webinars	10	13%
Celebration of Dairy Holiday Reception	4	5%
Capitol Hill Ice Cream Party	12	16%
Contribute to the PAC	9	12%
Other IDFA Activities	11	14%

100%
Engagement

77
Responses

What is the one thing that board members can do to be change agents for this industry segment?



Responses

Trade focus	Passion	Participate	Develop strategic plan for ingredient segment
Be active engaged participant	Involvement	Challenge paradigms	Committees
Focus efforts	Participate	Ensure level playing field on trade	Promote
Advocate	Engage	Participate	Voice
Participate	participate	Participate	Recruit
		Participate	Involvement

100%
Engagement

21
Responses