

UNITED FOR DAIRY



JANUARY 25-28

Palm Desert, California



IDFA
International
Dairy Foods Association

You Are Stewards of a Powerhouse Industry

**\$779
BILLION**

In Economic Impact

1,200+

Processing Facilities

**3
MILLION**

American Jobs

24,000+

Dairy Farms



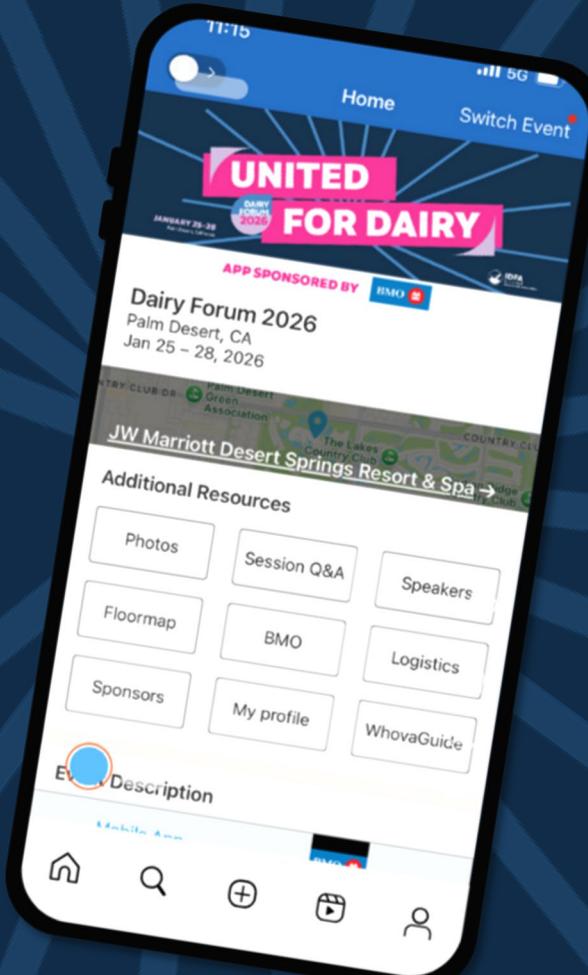
**DAIRY
FORUM
2026**



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Dairy Forum 2026 Program

- Health and Wellness
- Dairy Markets and Pricing
- Policy Environment
- Trade
- Immigration and Workforce
- Sustainability
- Leadership and Networking



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2025: One of the Greatest Years for American Dairy



\$80 Billion Retail Category

Dairy topped all other food categories



4 Years of Record Consumption

2024: 651 Pounds Per Person



\$9 Billion in Exports

Second highest year on record for value



\$11 Billion in Processing Investment

50+ projects in 20 states



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A New Era for Dairy

- Innovated product offerings
- Reclaimed relevance for dairy staples
- Expanded political footprint
- Invested capital in our farms and processing
- Dominated national nutrition conversation



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Dominated Nutrition Conversation!



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UNITED TO WIN FOR DAIRY

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WINNING IN THE AGE OF CHANGE

5 STRATEGIES

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A photograph of a woman with blonde hair tied up in a bun, wearing an orange ribbed sweater. She is smiling and holding a clear glass of milk in her left hand. In her right hand, she holds a spoon with a dollop of white yogurt on it. The background is a bright, slightly blurred indoor setting.

Strategy 1: **United to Win for Health**

**Dairy delivers
complete, natural,
affordable nutrition.**

Dairy: Proactive Partner in Health



Proactive
Leaders in the
Make America
Healthy Again
Movement

IDFA Healthy
School Milk
Commitment

IDFA Healthy
Dairy in Schools
Commitment

IDFA
Ice Cream
Commitment



Proactive, Industry-led Commitments

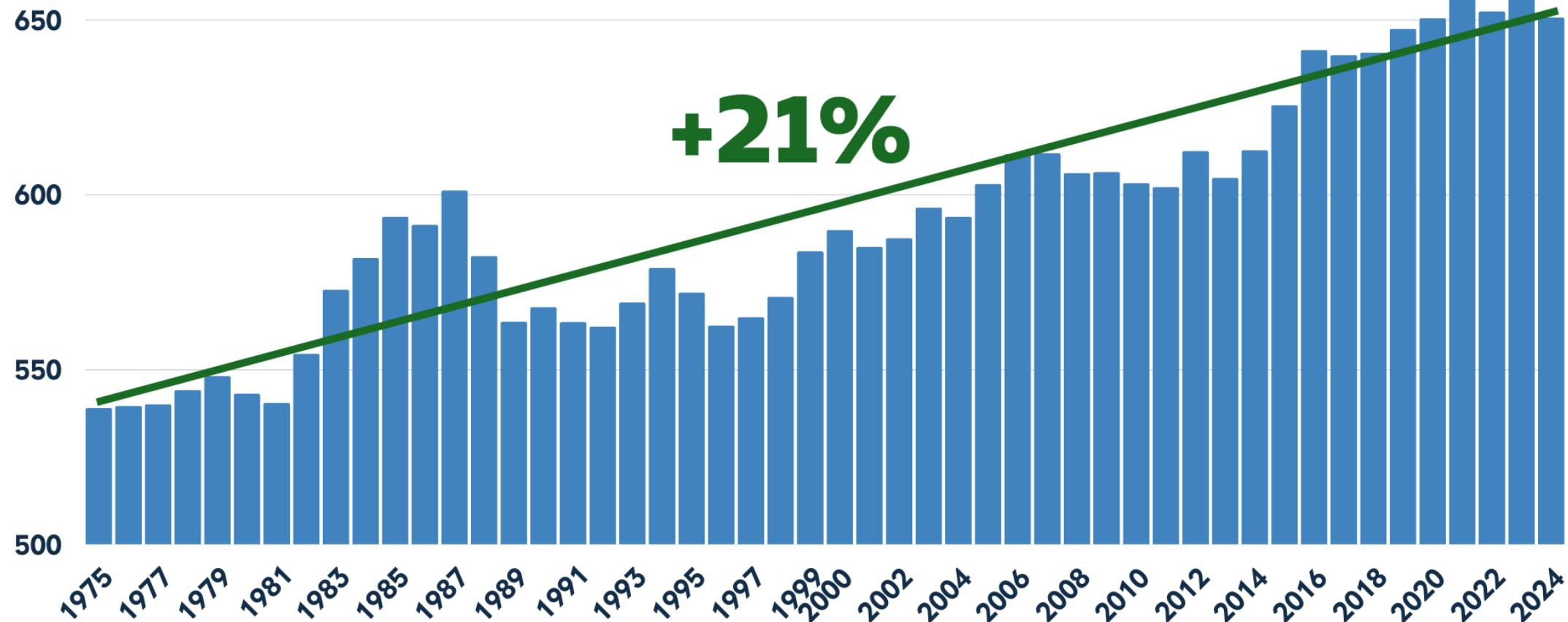


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Result 1:

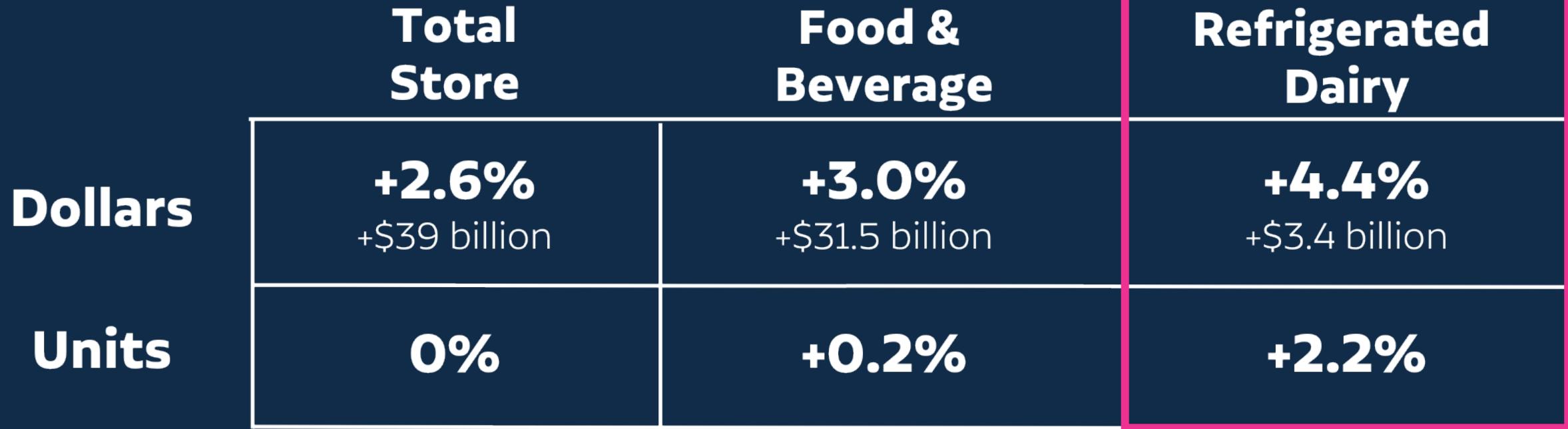
Consumption Continues to Set Records

Dairy products: U.S. Per Capita Consumption (pounds, milk-fat basis)



Dairy Is Driving Growth

% Change vs. Year Ago



Result 2:
Largest Retail Food Category
\$80 Billion

Source: Dairy Management, Inc.
and Circana MULO+



Result 3:
**Dietary Guidelines
Recommends Dairy
At All Fat Levels**

**Dietary
Guidelines
For Americans**



USDA

**Protein, Dairy,
& Healthy Fats**





Result 4:

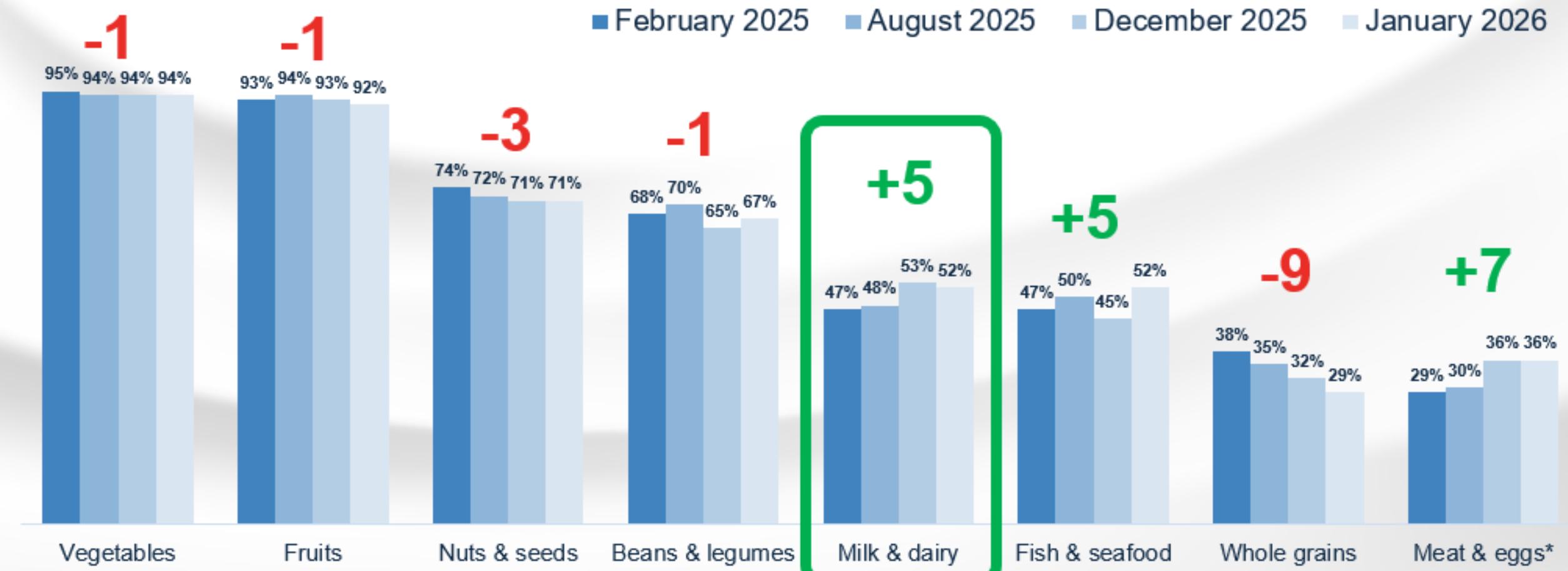
**Congress Passed the
Whole Milk for Healthy Kids Act!**



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Elevating Dairy's Image

Consumer perception of dairy increased 5%!





Promoting Dairy's Nutritional Value

Regulatory frameworks should focus on nutrient profiles and not level of processing

- “Ultra-Processed Foods”
- Front-of-Package Nutrition Labeling

We must be
United to Win on Health



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Strategy 2: **United to Win for Growth**

We must be united
in our ambition to
seek and secure
new markets

Historic Capital Investment From Farm Genetics to Facility Expansion

Transition from volume-driven to value-driven



Genetics



**Precision
Breeding**



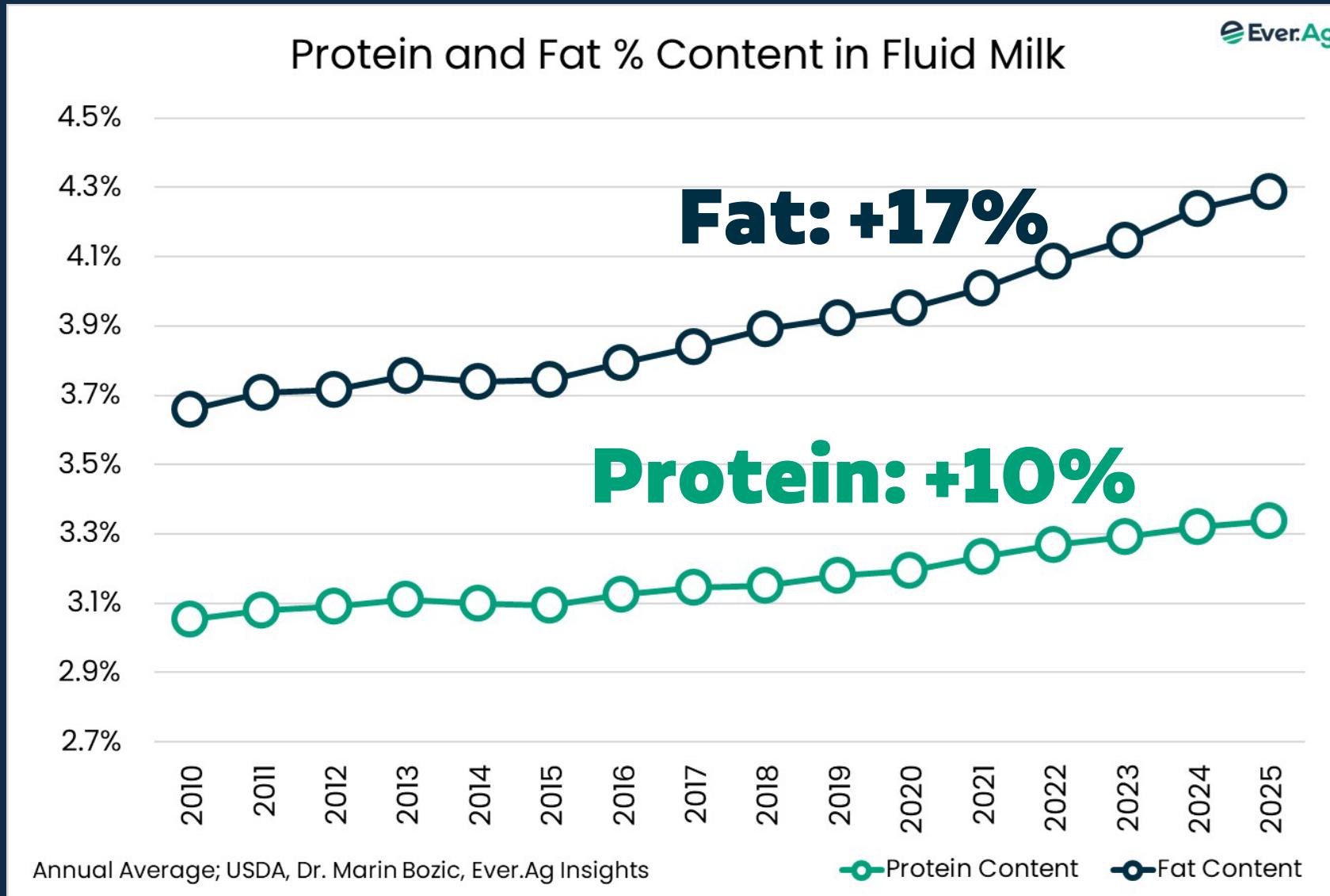
**Advanced
Nutrition
Interventions**

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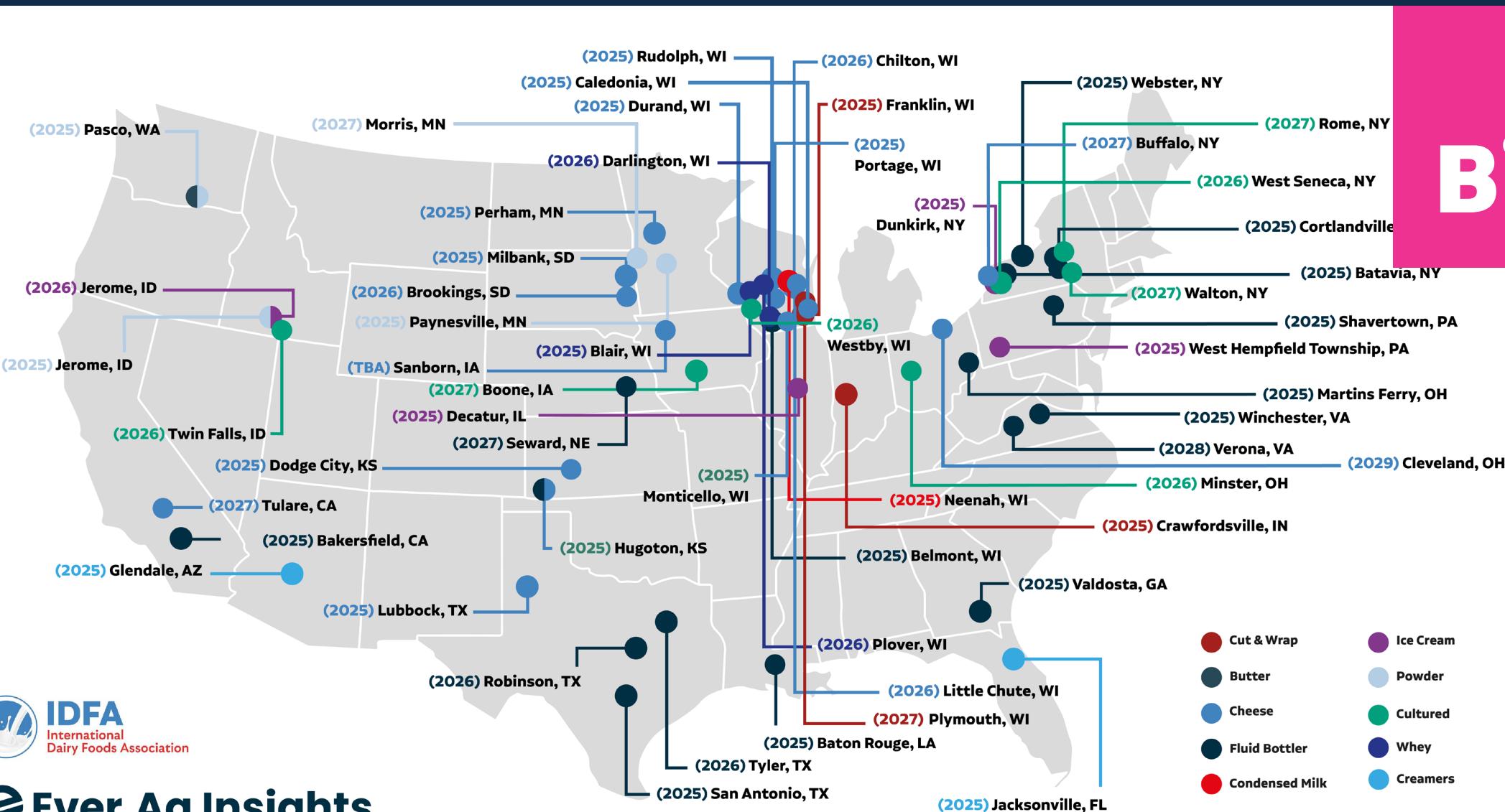
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High-Quality, Component-Rich Milk

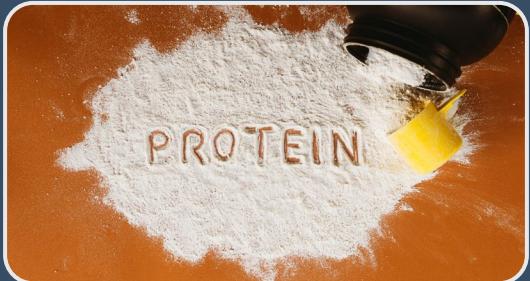


**Enables
Specialized
Ingredients**

Historic Capital Investment in Plants



Growth: Four Market Fundamentals



1.

High-Protein
Leadership

2.

Culturally-
Appealing
Products

3.

Digestive
Health

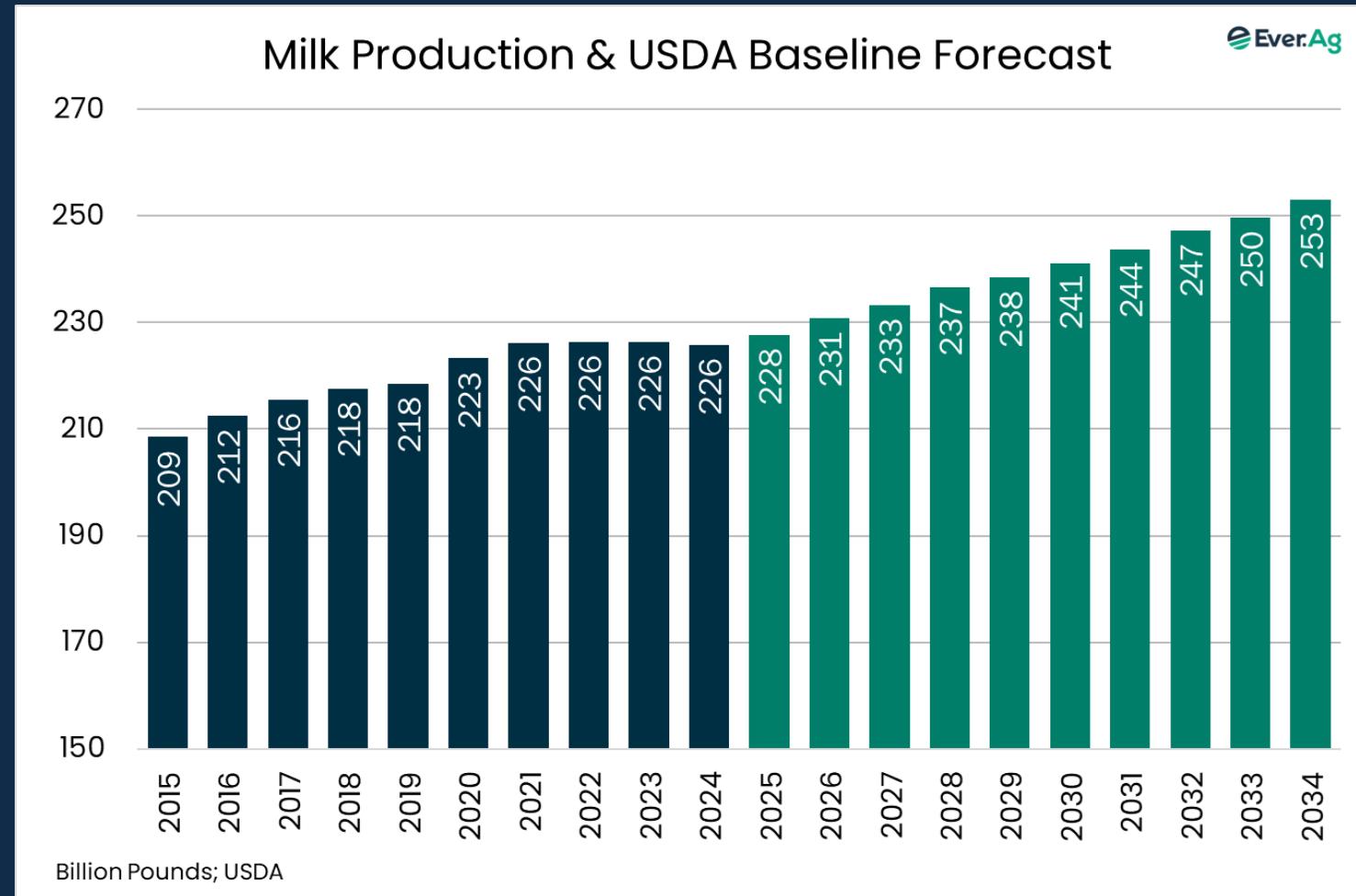
4.

Sustainability

New Export Markets Required

**27 billion lbs. more
milk by 2034**

- **77% for domestic use**
- **23% for export (skim-solids basis)**
 - **Up from 20% today**



Export Destinations for U.S. Dairy, 2020-2024



Export Growth and Diversification





Next Steps on Trade

- Correct and preserve USMCA
- Finalize current trade deals
- Expand into emerging and new markets
- Allocate capital toward facilities producing specialized, high-value, and shelf-stable products



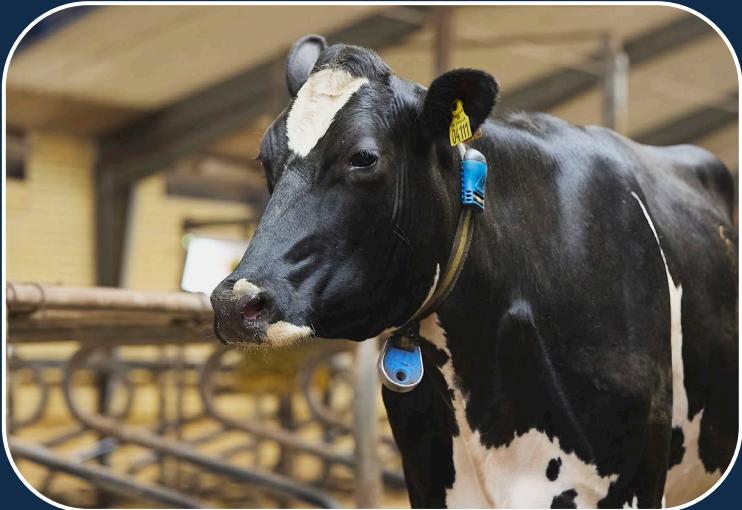
Strategy 3: **United to Win for Technological Innovation**

Innovation is the catalyst that transforms challenge into opportunity.



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Technological Revolution Begins on the Farm



Smart Collars



Robotic Milkers



AI-Driven Herd Management

**High-tech = More Attractive
To The Next Generation**



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Technology Enhances Sustainability Efforts

We are uniting the supply chain around:



**2050
Commitments**



**Dairy Methane
Action Alliance**



**Processing
Efficiency**

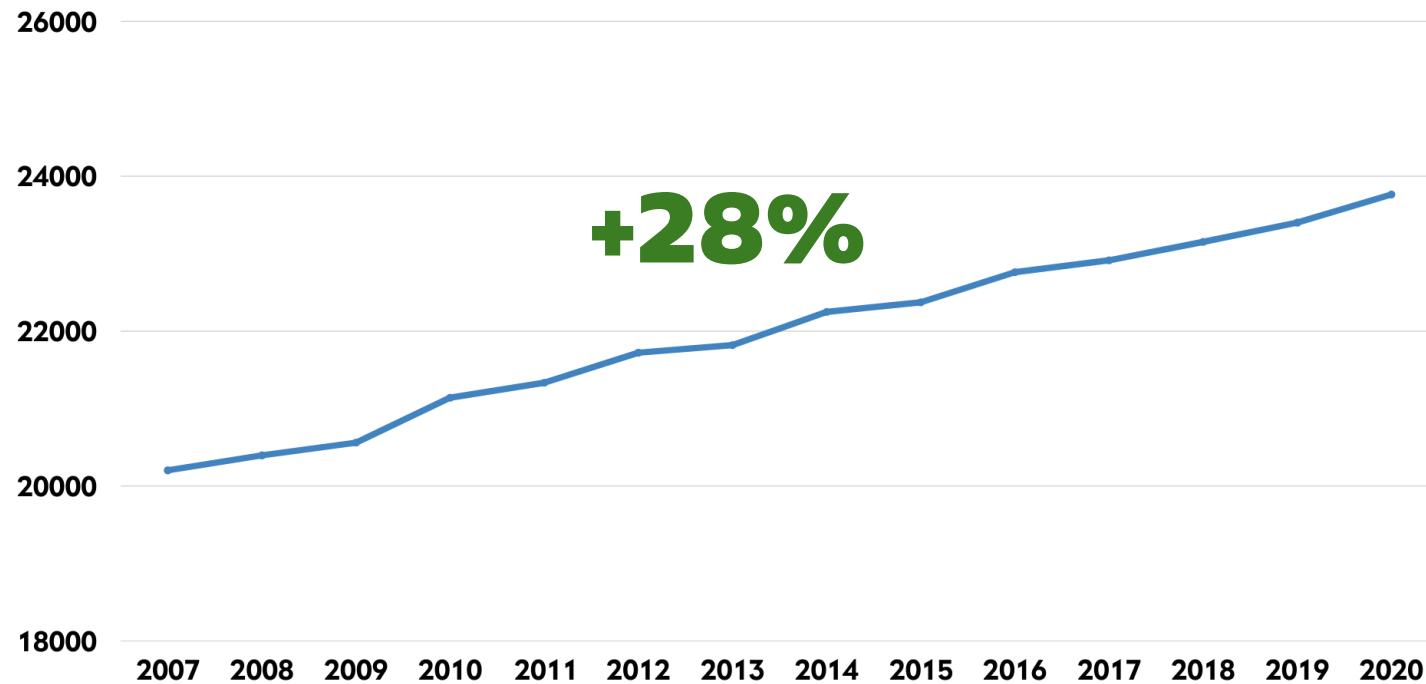


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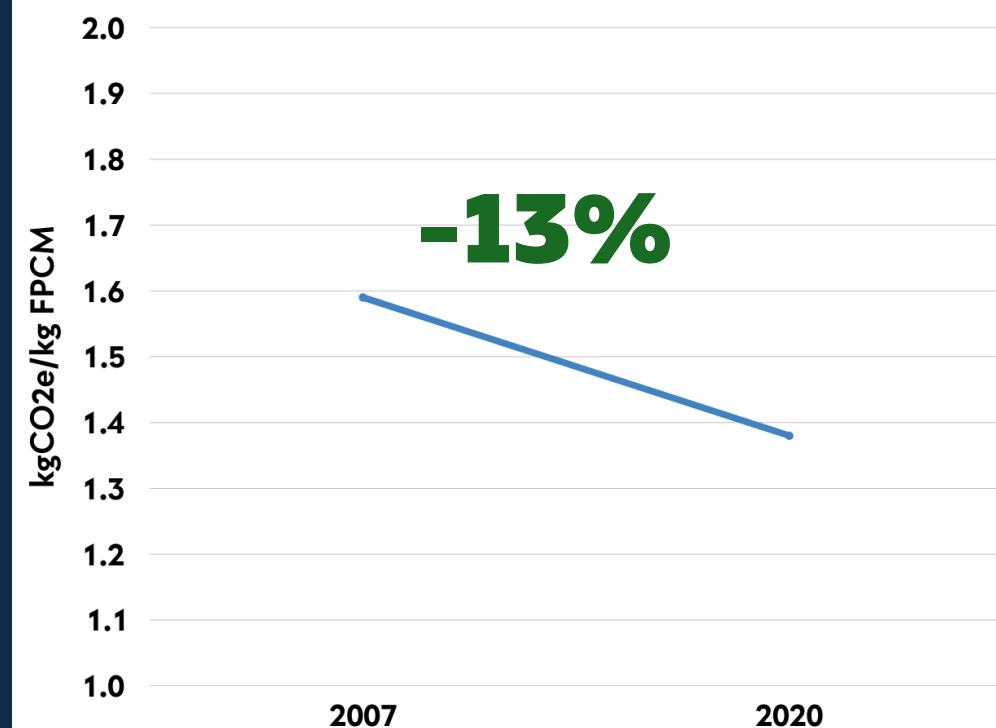
Sustainability is Efficiency

Between 2007 to 2020, U.S. milk production increased 28%
while GHG emissions per unit of milk declined 13%

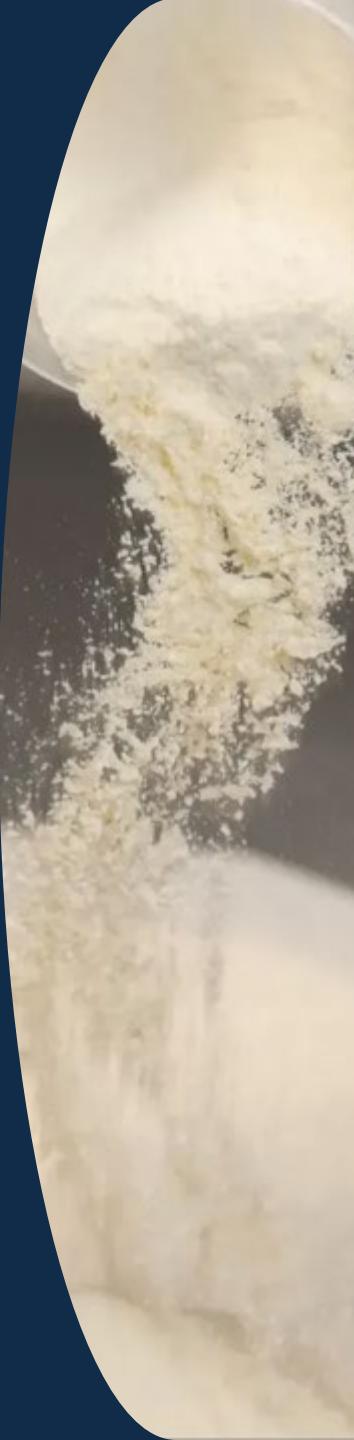
Milk Per Cow, U.S., Annual, Pounds



U.S. Milk Emissions Intensity



India needs 61 million cows to produce the 226 billion pounds of milk that the U.S. produces with 9 million cows.



Dairy Cow Power and Decarbonization

Biodigesters

- 350+ active dairy bio-digestion projects
- Renewable Natural Gas (RNG) for states with Low Carbon Fuel Standard (LCFS) policies

Byproducts

- Milk permeate could be a choice biofuel feedstocks

In the Plant: Resilience and Radical Transparency



**AI-Powered
Predictive
Maintenance**

**Protection
Against
Cyber Threats**

Food Ag ISAC
An IT ISAC Community

**IDFA Dairy Technology
and Innovation Network**



**Unparalleled
Food Safety and
Traceability**

In the Product: Precision Nutrition

Enabled by:



AI-Driven R&D Platforms



Personalized Microbiome Analysis



Wearable Sensors



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In the Market: Delivering for the Consumer

We need to:

- Understand consumer demands and trends through social listening
- Partner with retail and foodservice for POS data
- Use digital channels and apps to place dairy at center of personalized wellness



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Strategy 4: **United to Win for Our People and Communities**

**U.S. dairy is building a
reputation as one of
the best sectors to
work.**



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Workforce Challenges



Slowing Labor Force Growth

U.S. born labor force will shrink due to aging workforce and low birth rate



Manufacturing Skills Gap

1.9 million manufacturing jobs (50%) unfilled by 2033 due to skills gap



Immigration Reform Needed

U.S. dairy needs year-round access for farms and processors

Dairy's Appeal

- High-tech and data-driven
- Essential to feeding the world
- Critical to the rural economy
- Focused on addressing climate change



We must highlight dairy as
The Most Attractive Place to Work



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Investing in Workforce Development

We attract talent and skilled employees through:



**Comprehensive
Training Programs**



**Competitive
Compensation**



**Supportive Work
Environments**



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IDFA Is Leading This Charge



**NextGen Leadership
Program
Cohort 7**

**Women in Dairy
1,250 Members**

**Rapid Response
Advocates for Dairy
(RRAD) Group**



**Food Safety
Education Portal**

SafelceCream.org

United for Food Safety

Amplifying Our Community and Social Impact



1,000,000 meals to food-insecure families!



Amplifying Our Community and Social Impact

Across IDFA Member Companies





Strategy 5: **United to Win for Advocacy**

Supportive policy is critical to defending and expanding our market.



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Healthy School Milk Commitment

- 37 school milk processors met Commitment
- No more than 10g added sugar by 2025/26
- Added sugar now at 7.2 grams – a 60% reduction

You Saved Flavored Milk in Schools!



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Healthy Dairy in Schools Commitment

- 54 processors pledged to eliminate certified artificial colors in school milk, yogurt and cheese by 2026/27



“Our dairy processors who will stand up and say, even though it’s probably not great for our bottom line, we are in on ‘Making America Healthy Again.’”

~ ***Brooke Rollins, U.S. Secretary of Agriculture***



IDFA Ice Cream Commitment

- 44 U.S. ice cream companies pledged to eliminate certified artificial colors by Dec. 31, 2027
- Represents more than 90% of ice cream sold in the U.S.
- 11,000 news media mentions, reaching 1.45 billion people



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ELEVATING DAIRY IN THE EYES OF POLICYMAKERS



Leveraged Goodwill for Policy Success



**Whole Milk for
Healthy Kids
Act**



**Dietary
Guidelines for
Americans**



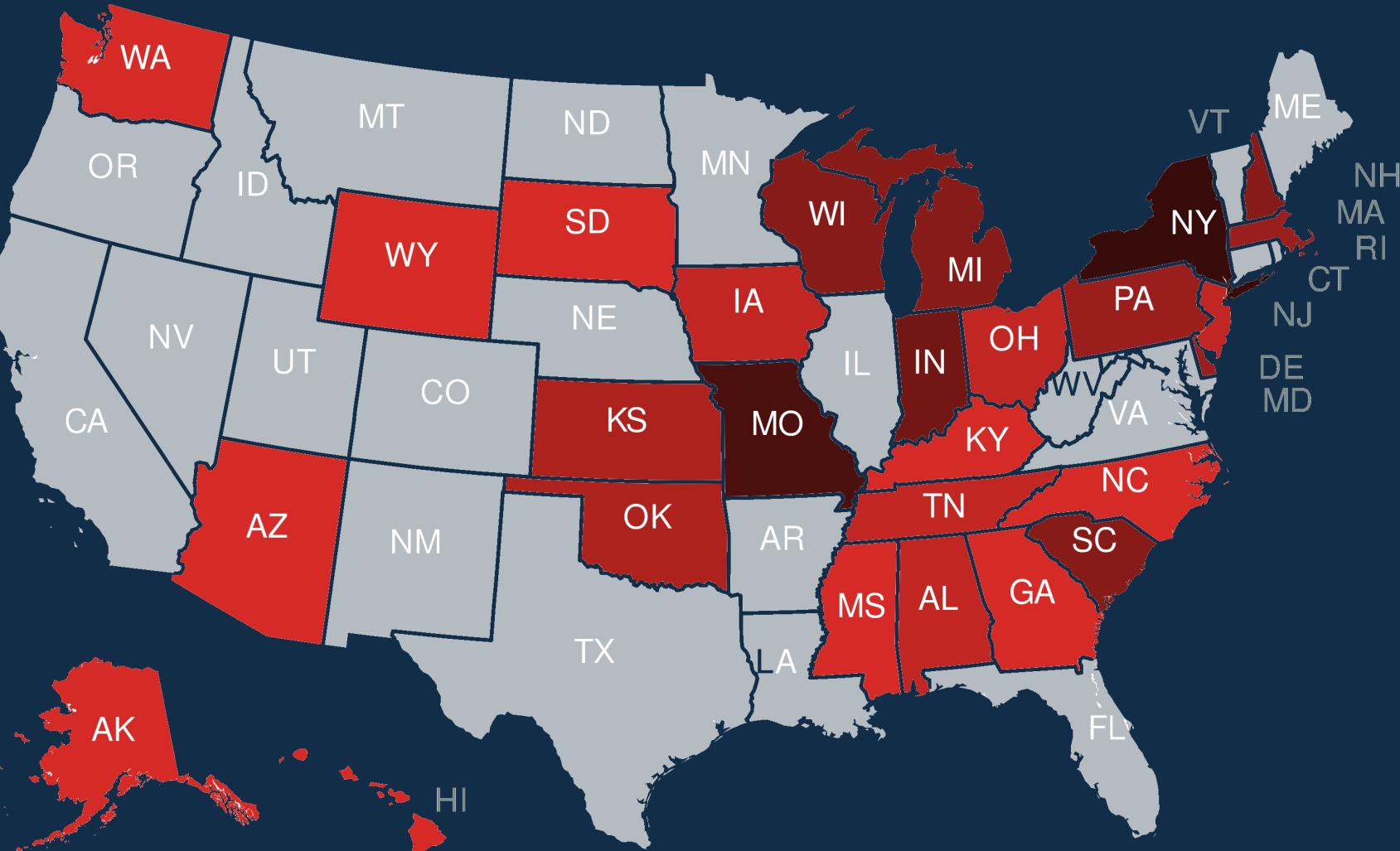
**Restored WIC
Dairy Benefits**



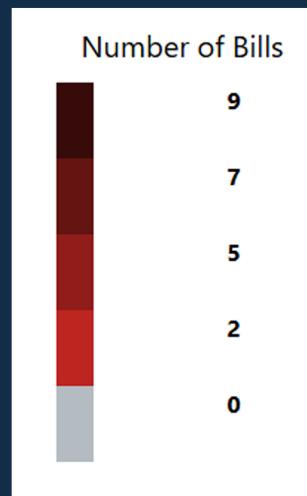
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Defending our Market

“Ultra-Processed Foods” and SNAP Waivers



>80 Food Policy Bills Filed In 2026



Winning in State Legislatures



**Your Local
Voices &
Relationships**

**Digital Tracking
and Timely
Engagement**

**Uniting Across
Dairy Supply
Chain**



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Influencing Policy

IDFA empowers you and your teams through:

Grassroots Action



IDFA digital tools and communities like NextGen, Women in Dairy

Political Affairs



Fly-ins, fly-outs
IDFA PAC

Honoring Supporters



Recognition for dairy champions

Advocacy Toolkits



Messaging
Data (e.g. Dairy Delivers)

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We need everyone engaged—from the
executive suite to the plant floor!



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5 Strategies to Win

Winning with Growth

Expand existing markets and secure new markets

Winning with Technological Innovation

Embrace technology and innovation

Winning with People & Communities

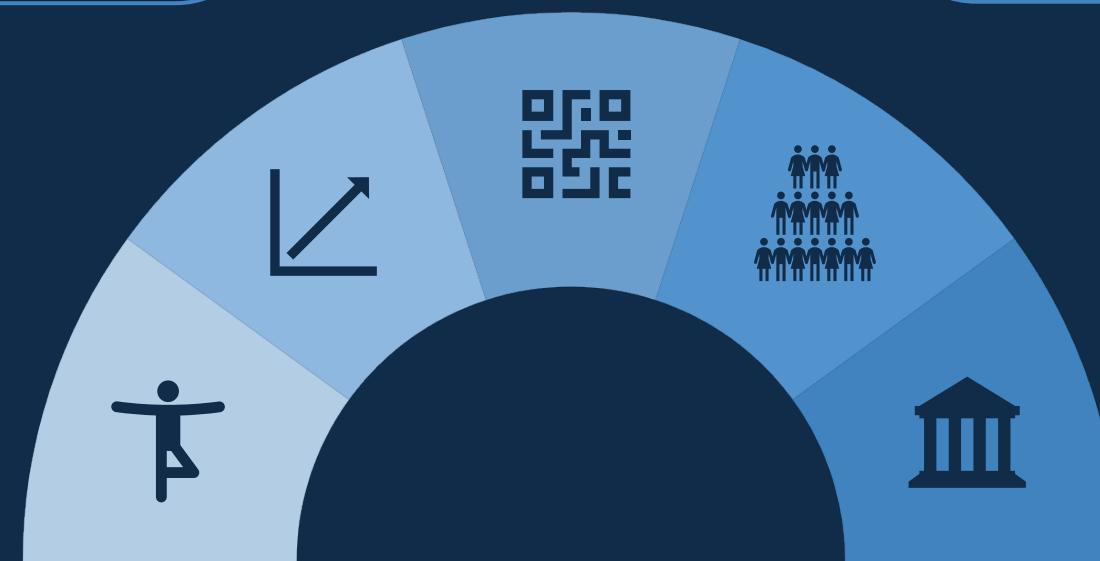
Make dairy the best place to work

Winning with Health

Amplify dairy's health halo

Winning with Advocacy

Speak with one collective voice



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THANK YOU!



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