



Idaho Dairy Industry Overview

Agricultural Air Quality Task Force
April 30, 2014



Idaho Dairy Operation by Size

Numbers provided by ISDA – January 2014



TOTAL DAIRY OPERATIONS: 526

MILK COWS IN IDAHO: 541,587

Idaho Dairy Industry

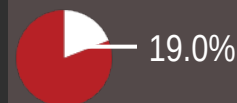
January 2014



TREASURE VALLEY

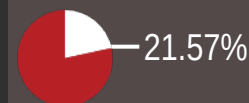
DAIRIES

100



COWS

118,307



AVERAGE COWS / DAIRY

1,183

MAGIC VALLEY

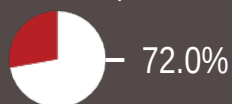
DAIRIES

304



COWS

396,545



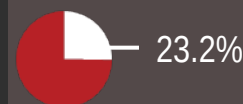
AVERAGE COWS / DAIRY

1,284

EASTERN IDAHO

DAIRIES

122



COWS

33,098

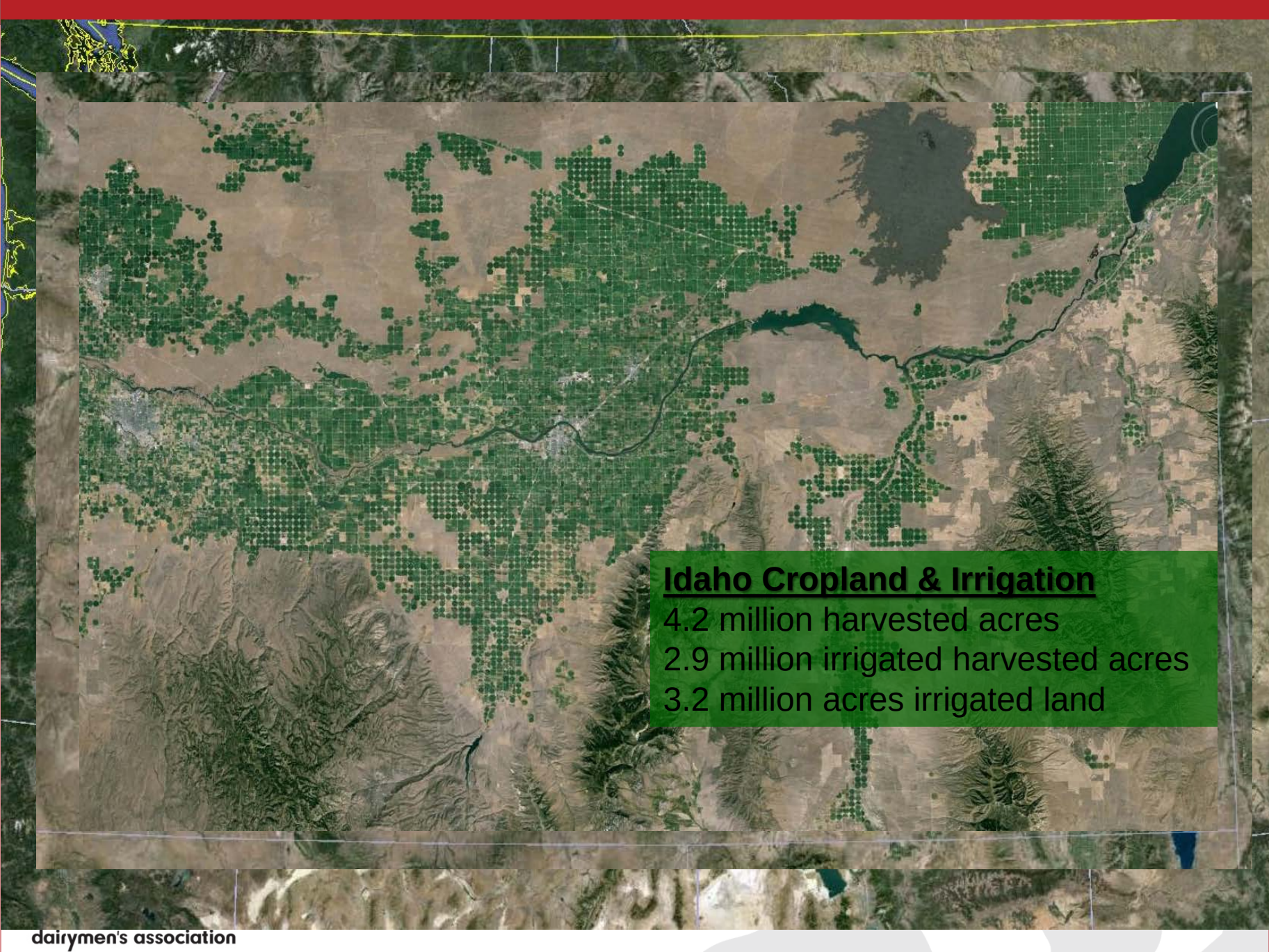


AVERAGE COWS / DAIRY

271

Aerial of a Western Style Open Lot Dairy



An aerial photograph of Idaho with a semi-transparent map overlay. The map uses a grid of green squares to represent cropland and irrigation. The squares are concentrated in the central and northern parts of the state, particularly along river valleys and in the Snake River Plain. The background shows the natural terrain, including mountains in the south and west, and the Snake River flowing through the center. A large reservoir is visible in the northeast.

Idaho Cropland & Irrigation

4.2 million harvested acres

2.9 million irrigated harvested acres

3.2 million acres irrigated land

Idaho Processing

January 2014

MAGIC VALLEY

Glanbia Foods, Richfield
Glanbia Foods, Gooding
Glandia Foods, Twin Falls
Jerome Cheese, Jerome
Darigold, Jerome
Idaho Milk Products, Jerome
Cloverleaf Creamery, Buhl
Chobani, Twin Falls
Gossner Foods, Heyburn
High Desert Milk, Burley
Brewster Cheese, Rupert
Stoker Wholesale, Burley
Commercial Creamery, Jerome
Ballard Cheese, Gooding

TREASURE VALLEY

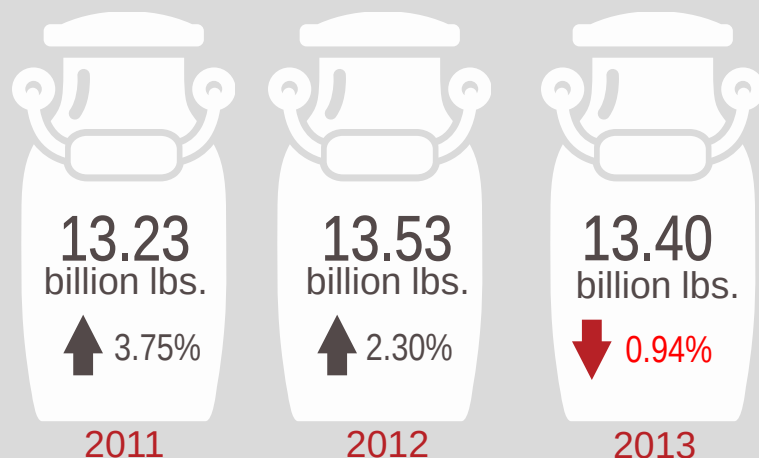
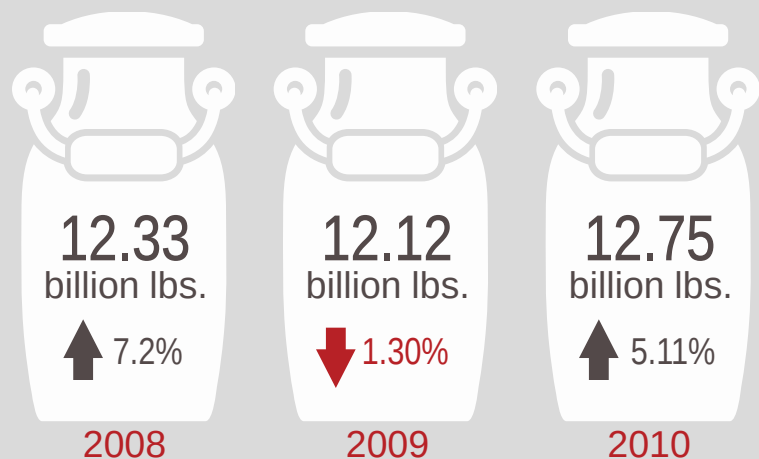
Sorrento Lactalis, Nampa
Darigold, Caldwell
Darigold, Boise
MeadowGold, Boise
Marathon Cheese, Mountain Home

EASTERN IDAHO

Reed's Dairy, Idaho Falls
Glanbia Blackfoot Cheese Division,
Blackfoot
Nelson Ricks Cheese, Rexburg

Idaho Milk Production

Numbers provided by IDPC



Idaho Growth 1998 – 2008

BSU Study by Dr. Holly and Dr. Church

PRODUCTION	U.S.	IDAHO
	+48%	+533%
	+147%	+633%

Jobs Created by Dairy

2008 BSU Study

DAIRY FARMS	MANUFACTURING	SECONDARY & INDUCED EMPLOYMENT	TOTAL
8,300	2,371	22,406	33,077

2012 Crop & Livestock Cash Receipts

Crops \$3.4 billion, up 5%

Potatoes: ↑4%

- Production up 12%, prices down 9%

Barley: ↑32%

- Production up 15%, prices up 23%

Wheat: ↑4%

- Production down 15%, prices up 8%

Dry Beans: ↑27%

- Production up 61%, prices up 27%

Greenhouse/Nursery: Unchanged

Hay: ↓12%

- Production down 4%, prices same

Onions: ↓7%

- Production down 16%, prices up 12%

Sugarbeets: ↓10%

- Production up 7%, prices down 15%

Livestock \$4.3 billion, up 8%

Cattle & Calves: ↑25%

- Inventories up 5%
- Prices averaged 19% higher

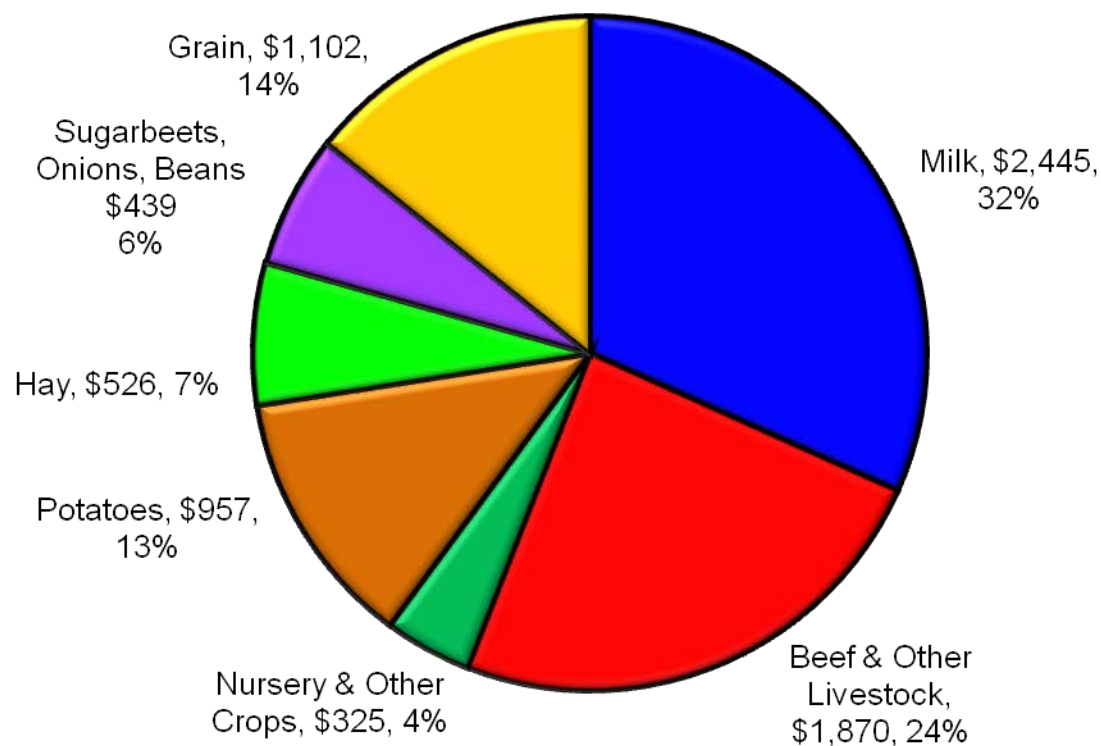
Milk: Unchanged

- Production up 2%
- Prices down 2%

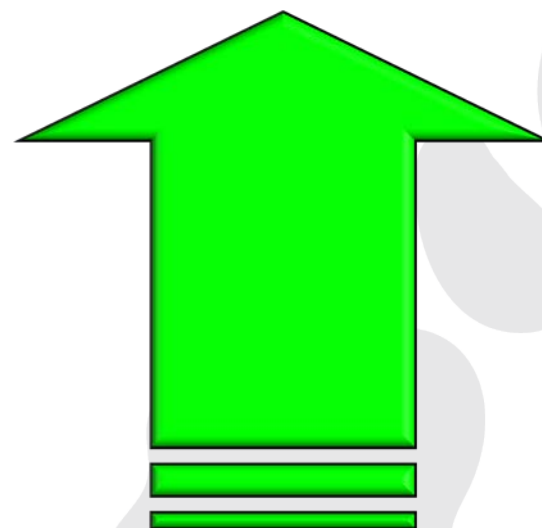


Record High Cash Receipts

Idaho Cash Receipts, 2012



\$7.7 billion, 2012



\$7.4 billion, 2011

IDA's Commitment to Education & Research

Our #1 Investment from 2007-2013

- Dairy Production Research - \$503,930
- Dairy Education - \$390,479
- Environmental Research - \$975,685
- Total Research & Education - \$1,870,094
- Idaho National Center for Livestock & Environmental Studies (INCLES) – IDA has committed \$3 million
- Youth Programs - \$174,396
 - FFA - \$62,423
 - 4H - \$75,473
 - College Scholarships - \$36,500

IDA's #2 Expense from 2007-2013

- Legal Fees \$1,484,672
- Key Legal Engagements
 - CERCLA/EPCRA
 - Permit to Construct – Ammonia Rules
 - Methanol Emissions
 - Citizen suit against 5 Yakima Dairies

IDA's Views on the Clear Air Act

- Agriculture was intended to be exempt from the Clear Air Act
- If regulation is unavoidable; Idaho ammonia regulations provide a good template
 - Negotiated process
 - Regulatory agency
 - Industry
 - Citizen group(s)
 - Economical – for both industry and consumers
 - Flexible
 - Produces compliance results, thus environmental protection
- Data used to base regulations needs to be **scientifically** accurate and peer reviewed by unbiased parties (i.e. Universities & ARS)
- The entire production system needs to be considered
- If regulations are required for CAFO's, all agriculture should have same regulations