Challenging Times, Changing Markets

Northeast Milk Marketing in 2015

Report by Farm Credit East Knowledge Exchange

FARM CREDIT EAST

TABLE OF CONTENTS

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INTRODUCTION

This Farm Credit East Knowledge Exchange report examines some of the structural changes in the Northeast dairy industry that have contributed to the current situation facing the region's dairy producers. This paper is intended to provide background and insight into the current situation for producers, policymakers and other industry stakeholders.

Following the record high milk prices of 2014, a supply demand imbalance and other factors in the global dairy market in 2015 have caused prices to drop significantly. In Federal Milk Marketing Order One, under which much of the Northeast's milk is priced, the order's uniform price fell 37.3 percent from its peak in September 2014 of $26.16/cwt to $16.40/cwt in March 2015.

While dairy producers have faced price declines and volatility for decades, this year there have also been marketing disruptions. These have been caused by regional milk supplies exceeding processing capacity as well as some producers being dropped by their handlers and forced to find new markets for their milk. Other producers have been notified by their handlers that they will not commit to purchasing increased production from herd expansion.

This paper will discuss a number of factors contributing to the current situation:

1. Continued growth of milk production and the geographic shift in milk production nationally and within the region.
2. Change in the consumption patterns of dairy products in the Northeast and nationally.
3. Continued consolidation of milk producers and buyers.
4. Changes in the region's milk processing capacity.
5. Implications of market changes to the long-term success of producers.

CURRENT SITUATION

The current dairy situation in the Northeast has been well documented. While not the focal point of this paper, it is the starting point and provides the context for the analysis and discussion that follows.

- As shown in Figure 1, dairy producers received record milk prices in 2014 with a national all-milk price of $23.97/cwt. In New England, New York and New Jersey, the weighted average all-milk price was $25.58/cwt in 2014.
- U.S. milk production reached record levels of 206.0 billion pounds in 2014 continuing a trend of significant growth since 2000 when national milk production was 167.7 billion pounds, a 23 percent increase in that time period.

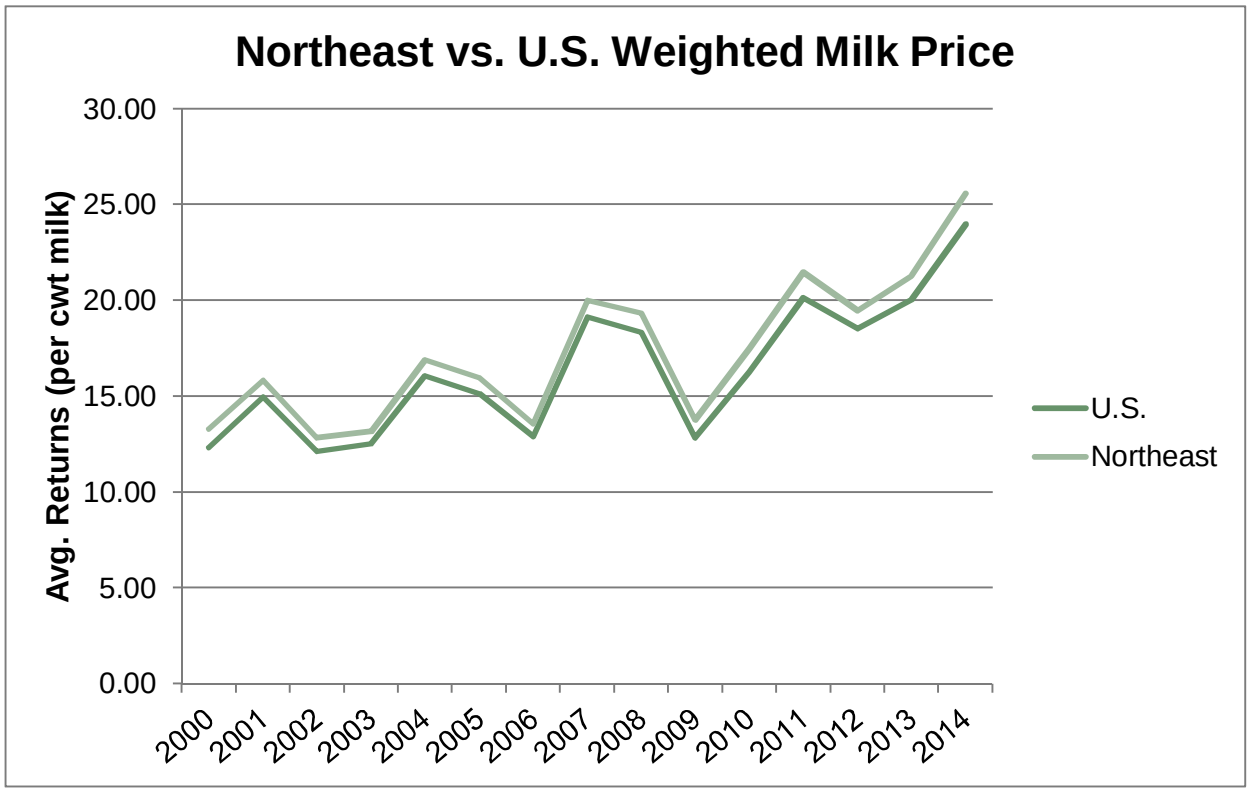

Figure 1: USDA, Milk Production, Disposition, and Income Summary, 2000-2014

Figure 2 compares that national growth with relatively flat production in New England, New York and New Jersey since 2000. It should be noted that in 2014, those eight states also experienced an increase in milk production with a record 18.0 billion pounds, a 2.0 percent increase over 2013.

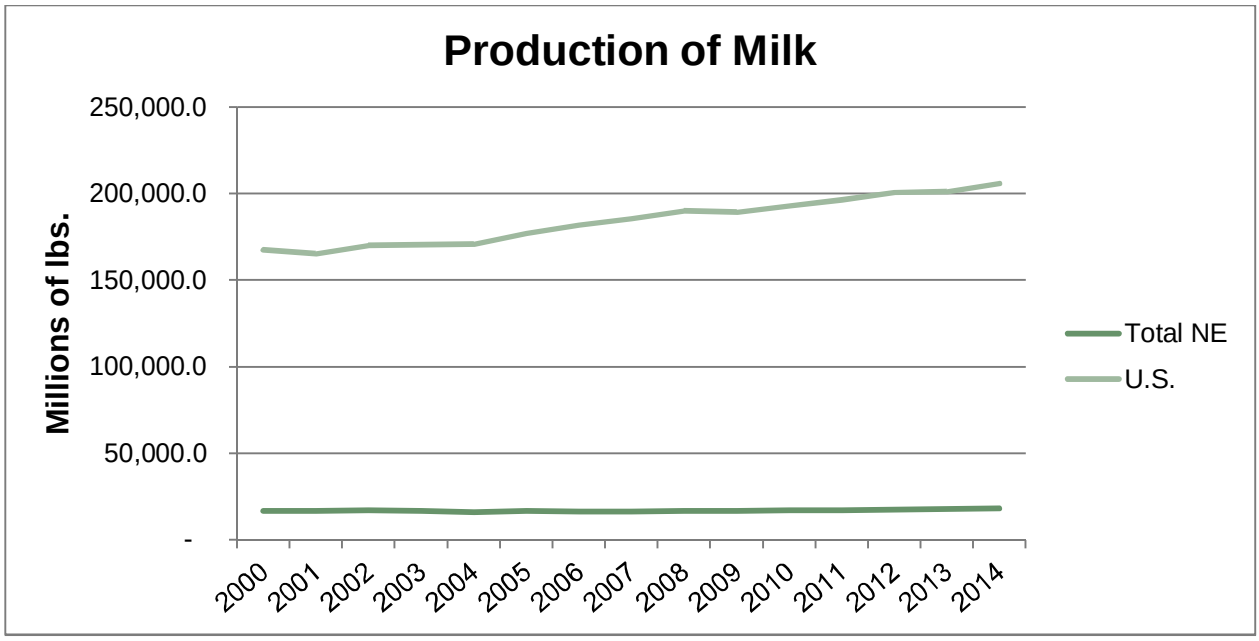

Figure 2: USDA, Milk Production, Disposition and Income Summary, 2000-2014

The strong prices in 2014 have been a factor leading to increased production nationally in 2015 with a 1.6 percent year over year increase through June. As will be discussed in the next section, however, the increase is not uniform across the country, which has implications for the Northeast when taken in combination with some of the changes in the national dairy marketplace.

CHANGES IN PRODUCTION

Over the longer term, as dairy farmers have become more efficient, the total number of farms has decreased, with almost three million fewer dairy cows today compared to 1970, though cow numbers have held steady for the last 15 years. Except for a period from about 1965 to 1975, milk production has steadily increased to its current level of over 200 billion pounds annually.

	Total Farms	Total Cows (thousands)	Milk production per cow (lbs.)	Total Production (million lbs.)
1950	3,681,627	21,936	5,314	116,602
1959	1,836,785	17,901	6,815	121,989
1970	647,860	12,000	9,751	117,007
1980	334,180	10,799	11,891	128,406
1990	192,660	9,993	14,782	147,721
2000	105,250	9,210	18,204	167,658
2010	53,132	9,123	21,142	192,877
2014	45,344	9,257	22,258	206,046

Table 1: The Changing Landscape of U.S. Milk Production Don P. Blayney, USDA-ERS, June 2002, Hoard's Dairyman, and USDA/NASS Annual Milk Production, Disposition, and Income (PDI) and Milk Production, various years

Consistent with the structural changes in milk production nationally, Table 2 and Table 3 show the distribution of farms in the Northeast by number of cows for 2002 and 2012, respectively. The data shows that for the two time periods there were similar number of farms with fewer than 20 cows and double the number of farms with more than 500 cows. Within this ten year span, there was also a 33 percent decrease in the number of farms with between 20 and 499 cows.

Farms milk cow herd size, 2002	CT	ME	MA	NH	NJ	NY	RI	VT	Total
1 to 9	118	177	132	82	5	982	15	165	1,676
10 to 19	17	22	26	9	5	287	3	34	403
20 to 49	40	118	65	38	20	1,706	11	344	2,342
50 to 99	54	144	86	69	67	2,810	9	553	3,792
100 to 199	50	53	53	42	31	1,027	4	249	1,509
200 to 499	27	37	17	12	7	406	1	130	637
500 or more	4	5	1	3	1	170	-	33	217
Total	310	556	380	255	136	7,388	43	1,508	10,576

Table 2: Census of Agriculture, 2002

Farm milk cow herd size, 2012	CT	ME	MA	NH	NJ	NY	RI	VT	Total	% Change 2002-2012
1 to 9	111	290	133	139	38	676	15	217	1,619	-3%
10 to 19	7	47	22	12	7	438	1	30	564	40%
20 to 49	43	83	40	23	24	1,475	5	193	1,886	-19%
50 to 99	29	79	42	41	37	1,676	4	304	2,212	-42%
100 to 199	23	46	26	19	18	659	4	166	961	-36%
200 to 499	25	27	15	16	5	257	1	107	453	-29%
500 or more	5	10	-	2	1	349	-	75	442	104%
Total	243	582	278	252	130	5,530	30	1,092	8,137	-23%

Table 3: Census of Agriculture, 2012

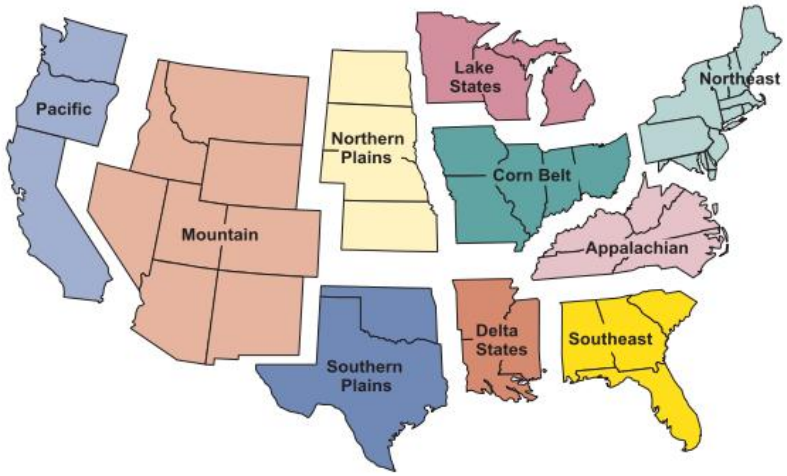

Figure 3: USDA Milk Production Regions

Concurrent with the increasing production in the U.S. there have also been shifts in regional production from the traditional dairy areas like the Northeast and the Upper Midwest to the West. Figure 3 shows the USDA's milk production regions.

Table 4 shows the national share of milk production by region. In 1980, the Northeast and Lake States produced almost half the nation's milk at 49 percent compared to 37 percent in 2014. During the same time period, the Pacific and Mountain regions' share of U.S. milk production increased from 19 to 41 percent. Since 2010, the share of national milk production between the Lake States and Northeast regions and the Pacific and Mountain regions has remained virtually unchanged.

Region's % of national milk production	1980	1990	2000	2010	2014
Northeast	20.4	18.4	17.6	14.9	14.5
Lake States	28.7	26.7	22.9	22.5	22.6
Corn Belt	12.4	11.4	9.0	8.5	8.4
Northern Plains	4.1	3.6	3.0	3.1	3.3
Appalachian	6.6	5.5	3.8	2.5	2.3
Southeast	3.5	3.3	2.8	2.1	2.2
Delta States	2.0	1.7	1.1	0.3	0.2
Southern Plains	3.7	4.6	4.2	5.1	5.3
Mountain	4.8	6.4	11.9	15.9	16.3
Pacific	13.9	18.4	23.7	25.3	25.0

Table 4: The Changing Landscape of U.S. Milk Production Don P. Blayney, USDA-ERS, June 2002 and USDA/NASS Annual Milk Production, Disposition, and Income (PDI) and Milk Production, various years.

Production growth in 2015 has shifted to the Midwest and Northeast, with the Midwest experiencing extremely strong milk production growth. Figure 4 below illustrates this shift, though it is unclear if it is a short-term anomaly or the beginning of a longer term trend.

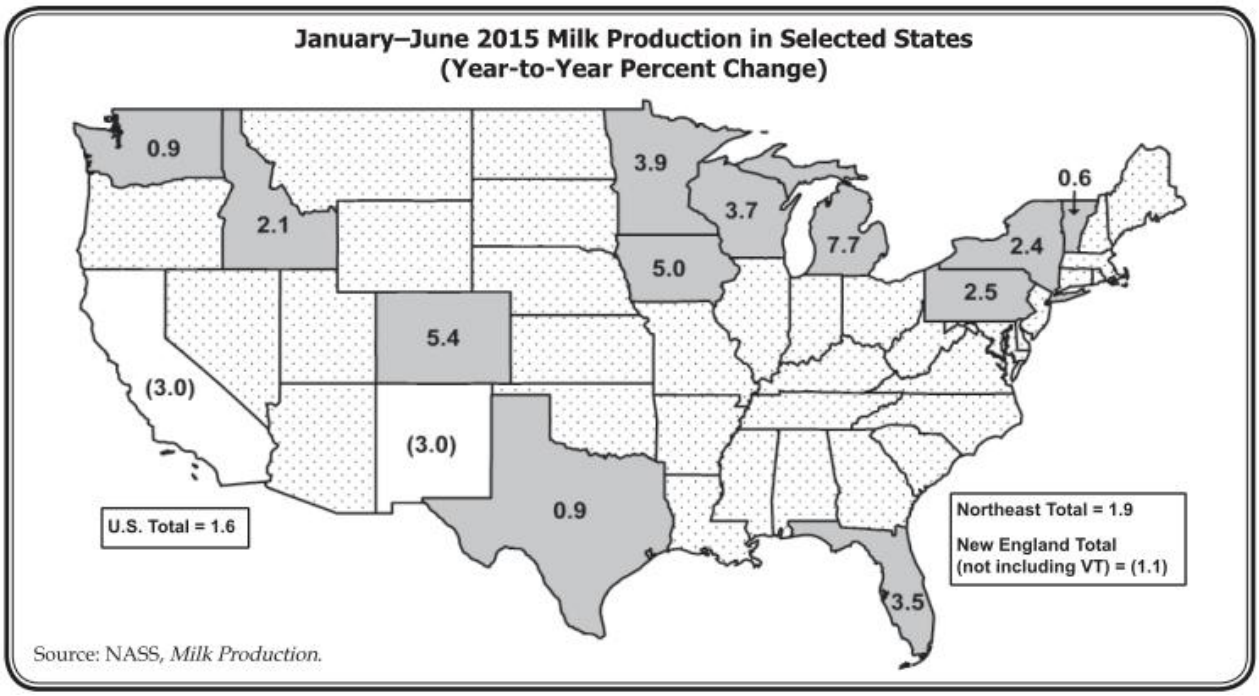

Figure 4: The Market Administrator's Bulletin – Northeast Marketing Area – Federal Order 1, July 2015

For thirty years, a majority of the growth of U.S. milk production has been outside the Northeast. The geographic shift in U.S. milk production has lessened since 2010, and to some extent reversed, at least in the short-term, year to date in 2015. The significant year over year increase in Upper Midwest milk production has meant that region has faced its own processing capacity issues this year.

Within the Northeast there has also been a shift in milk production from East to West. Figure 5, prepared by the Federal Milk Marketing Order One staff, shows that in the last decade, milk production has declined in some parts of New York while production has increased in Northern and Western counties, with some exceptions. Overall milk production in New York has increased from 12.178 billion pounds in 2005 to 13.733 billion pounds in 2014, a 12.8 percent increase during that time period.

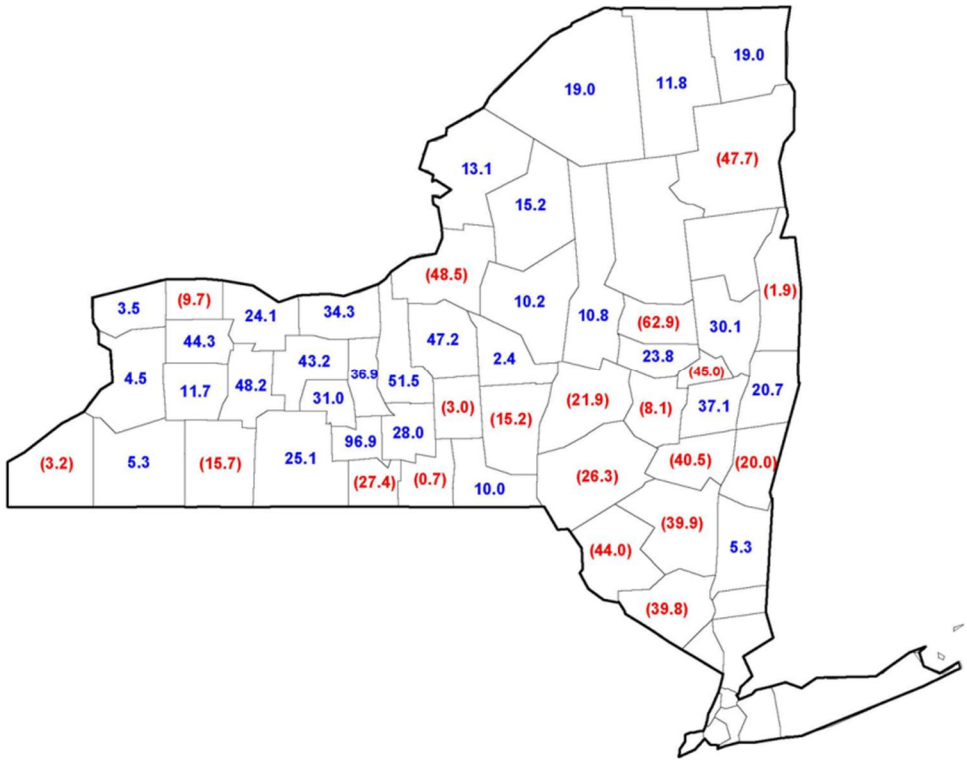

Figure 5: Change in producer receipts by New York counties, Percent Change 2005 to 2014.
Prepared by Federal Order 1 staff, 2015

Figure 6 shows the decline in production in counties across New England with more than twice as many counties experiencing a decline in production than ones experiencing an increase. Overall, milk production in the New England states declined from 4.231 billion pounds in 2005 to 4.181 billion pounds in 2014, a 1.2 percent decrease over the nine year period.

These are percentage changes, so in counties with low total production, the percentages may be heavily influenced by production changes for a relatively few number of farms. Figure 6 illustrates the point that with some exceptions, production in many counties throughout New England has declined in the last decade.

Production has been flat or declining in New England and while it is growing in New York, production has shifted west within the state.

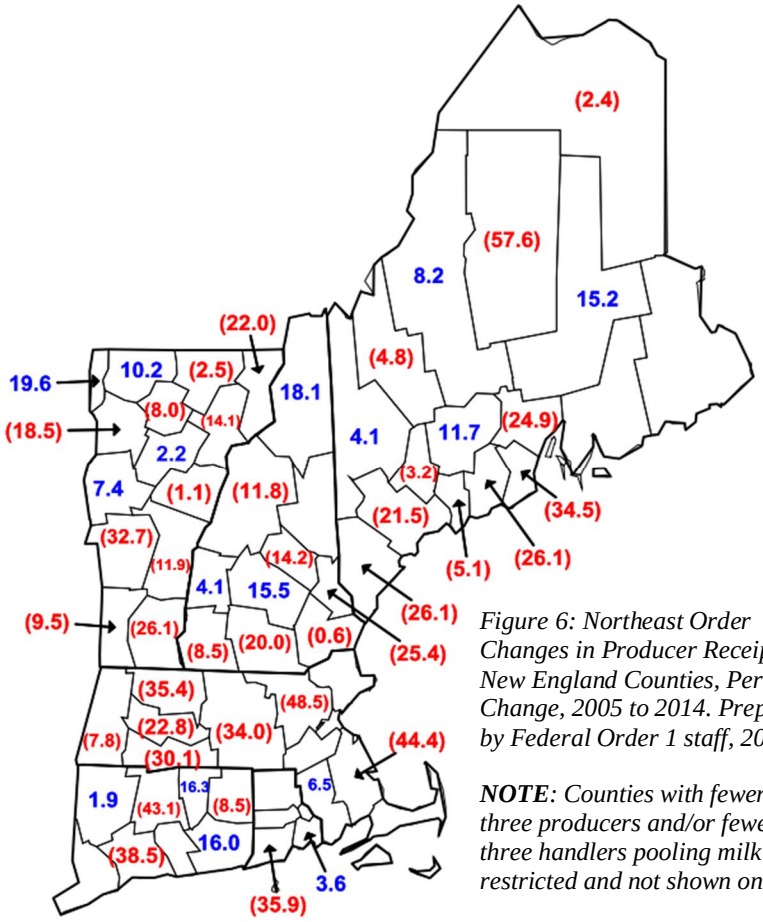

Figure 6: Northeast Order Changes in Producer Receipts by New England Counties, Percent Change, 2005 to 2014. Prepared by Federal Order 1 staff, 2015

***NOTE**: Counties with fewer than three producers and/or fewer than three handlers pooling milk are restricted and not shown on map.*

The impact of this intraregional shift in production has implications for the economics of transporting and pricing milk and the regional processing landscape. Before discussing the processing landscape, however, it is important to consider changing milk consumption patterns which have had a major impact on the processing sector.

CHANGES IN CONSUMPTION

Just as important to the changes in the production sector are the changes in consumption. Per capita fluid (or beverage) milk consumption, Class I[1] in the Federal Milk Marketing Order classification, has declined steadily since World War II and the rate of decline has accelerated in the last decade. Refer to Figure 7 on the following page.

[1] **Class I:** milk, concentrated fluid, fluid milk products, cultured or flavored milk drinks, and eggnog sold in the marketing area.
Class II: Milk used to produce fluid cream (and packaged ending inventory), cottage cheese, frozen desserts, yogurt, sour and aerated cream, custards, puddings, pancake mixes, infant and dietary formulas, candy, soup, bakery products, bulk fluid milk and cream products disposed of to a commercial food processing establishment, & bulk concentrated fluid milk used in a Class II product.
Class III: Milk used to produce cheese (other than cottage), plastic cream, anhydrous milkfat, butter oil, evaporated or sweetened condensed milk, shrinkage, and bulk concentrated fluid milk used in a Class III product.
Class IV: Milk used to produce butter, any milk product in dried form, and bulk concentrated fluid milk used in a Class IV product.

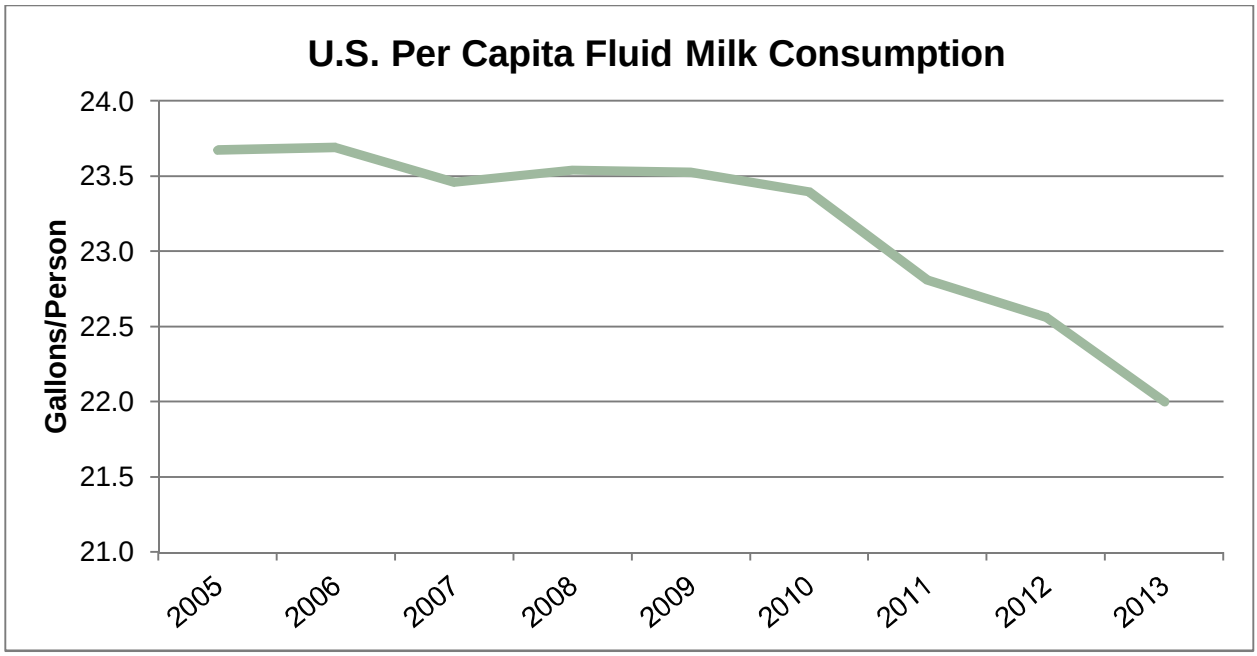

Figure 7: U.S. Per capita Fluid Milk Consumption, USDA, NASS 2005-2013

Even though population growth offsets the declining per capita consumption to some extent, overall Class I use has declined while overall milk production and dairy consumption have increased. This trend is true nationally though the following charts focus on the situation in the Northeast.

Northeast Class Utilization		
Pooled Milk	**Percent**	**Pounds**
Class I	31.3	710,346,357
Class II	25.4	576,268,391
Class III	24.3	552,568,303
Class IV	19.0	432,407,347
Total Pooled Milk		2,271,590,398

Table 5: June 2015 class utilization taken from The Market Administrator's Bulletin – Northeast Marketing Area – Federal Order 1, July 2015

The decline in Class I is one of the key factors in the current situation. As shown in the following two graphics, Class I use has declined on both a percentage and a total volume basis. On a percentage basis, the decline is more pronounced as the overall usage of other classes of milk has increased over the same time period.

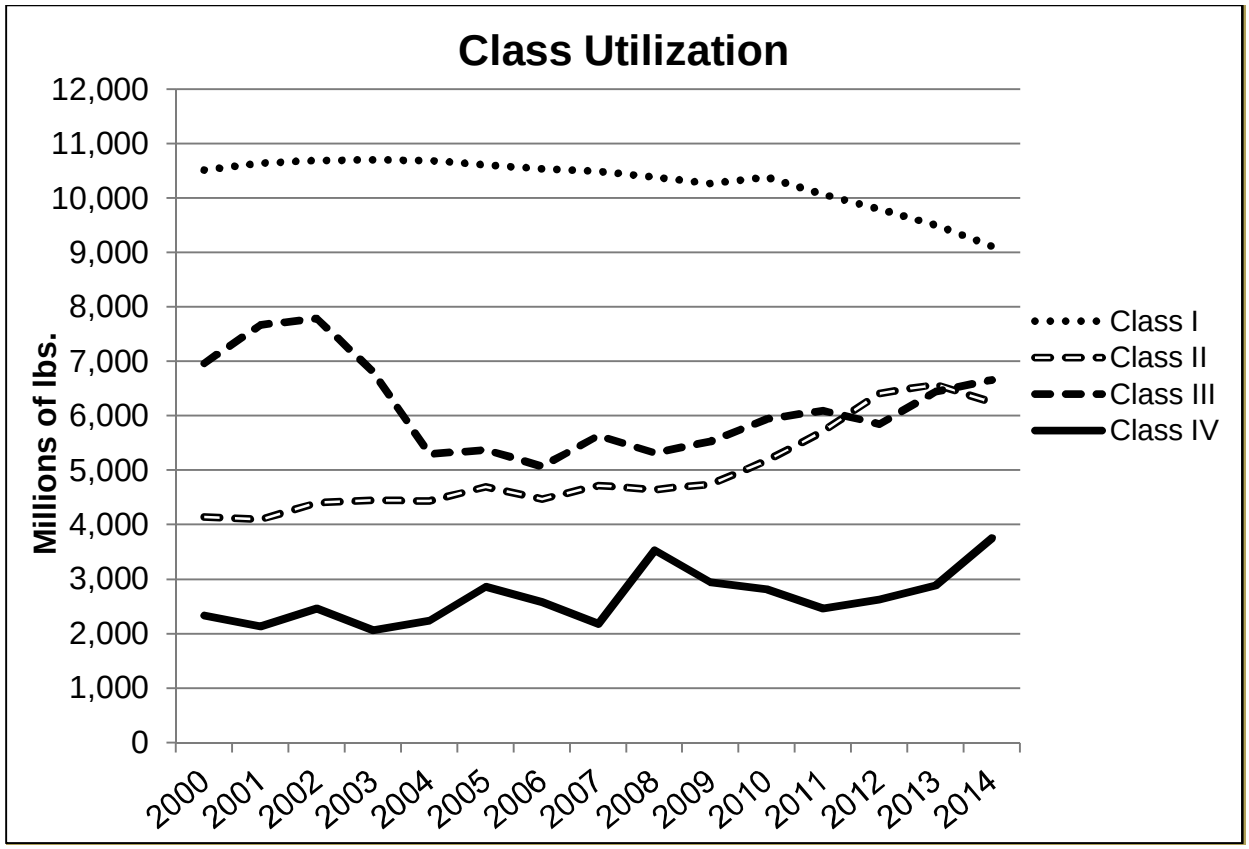

Figure 8: Northeast Marketing Area Statistical Handbook January 2000- present, Federal Order 1, July 2015

Over the last fifteen years, Figure 8 shows the trend of class utilization with Class I use declining while Classes II and IV have increased.

As shown in Table 6, the average percent utilization of the pool for milk going to Class IV (butter, nonfat dry milk and related products) is about double what it was 14 years ago, increasing from 9.7 to 19.0 percent. Class I has declined from 43.9 percent in 2000 to 31.3 percent of total utilization in June 2015.

Total Utilization: Federal Order 1			
Millions of pounds	**2000**	**2014**	**Percent Change**
Class I	10,513.1	9,122.9	-13%
Class II	4,146.9	6,247.0	51%
Class III	6,963.4	6,659.1	-4%
Class IV	2,333.5	3,764.1	61%
Total	23,956.9	25,793.1	

Table 6: Northeast Marketing Area Statistical Handbook January 2000- present, Federal Order 1, July 2015

One implication in this shift is that milk is being priced in lower value classes (Class I is almost always the highest) as shown in Table 7. The table shows that as Class I utilization declines, the value of the Class I differential (the higher price paid for Class I milk over other classes) per cwt of milk produced has declined, and made up a much smaller percentage of the order's uniform price in 2014 compared to 2006.

	Class I Differential Value	Class I Differential Value per cwt of producer milk	Average Uniform Price per cwt	Differential Value as a Percent of Uniform Price
2006	$309,571,087	$1.36	$13.53	10.1%
2014	$265,339,245	$1.03	$24.28	4.2%

Table 7: Class I Utilization, Prepared by Federal Order 1 staff, 2015

As shown in Figure 9, the growth in Class IV in the Northeast has corresponded with a rise in dairy exports nationally, as nonfat dry milk is one of the U.S. dairy industry's primary export products. This is not to say that all of the increased production of Class IV products in the Northeast has been exported. Given the prices for these products reflect international markets, however, the growth in export markets has been an important factor in Class IV product prices. This market has not been as robust in 2015, which has been influenced by a number of factors, including a strong dollar, which has made U.S. dairy products relatively more expensive this year. It should be noted that the last significant milk price decline in 2009 also corresponded with a decline in U.S. dairy exports.

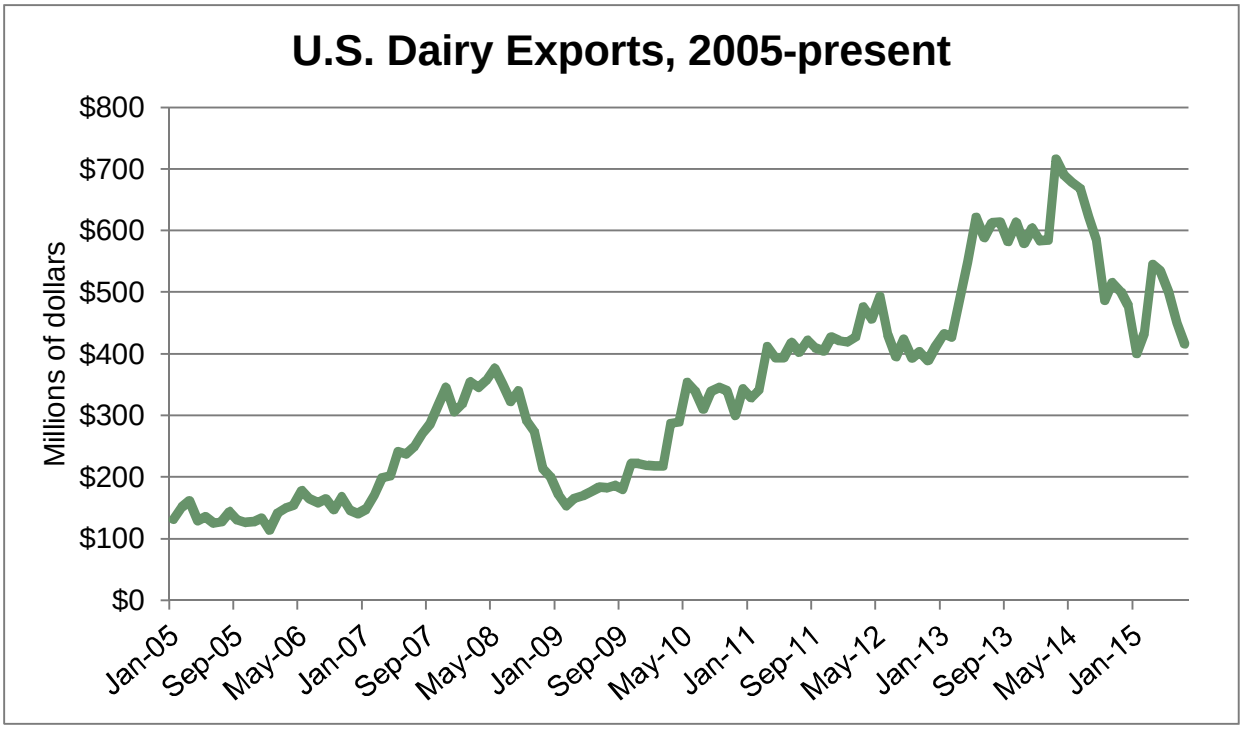

Figure 9:U.S. USDA Foreign Agricultural Service, Dairy Exports. 2005 - 2015

The decline in fluid milk sales has had a significant impact on milk marketing in the region. On a positive note, growth in other dairy products, most notably yogurt, has offset some of the declines, though some yogurt production has shifted out of the region in the last two years as evidenced by 2014 and year to date 2015 Class II usage, which are about 5 percent below the comparable periods in 2013. The decline of Class I use in the region, however, may be the largest influence on the current situation.

CONSOLIDATION AMONG PRODUCERS AND MILK BUYERS

Another potential factor in the current situation is not just how much milk is being produced, but who is producing it and who is purchasing it.

On the producer side, consolidation of dairy farms is well documented. In 2000, the Northeast Milk Marketing Order was formed as the consolidation of the New England, New York - New Jersey and Middle Atlantic orders. Since its formation, the number of producers supplying the order has declined from 18,009 in 2000 to 11,241 in June 2015, a 38 percent decrease.

Also well documented is the increase in production per farm, as evidenced by the daily deliveries per farm (DDP) in states across the Northeast shown in Figure 10.

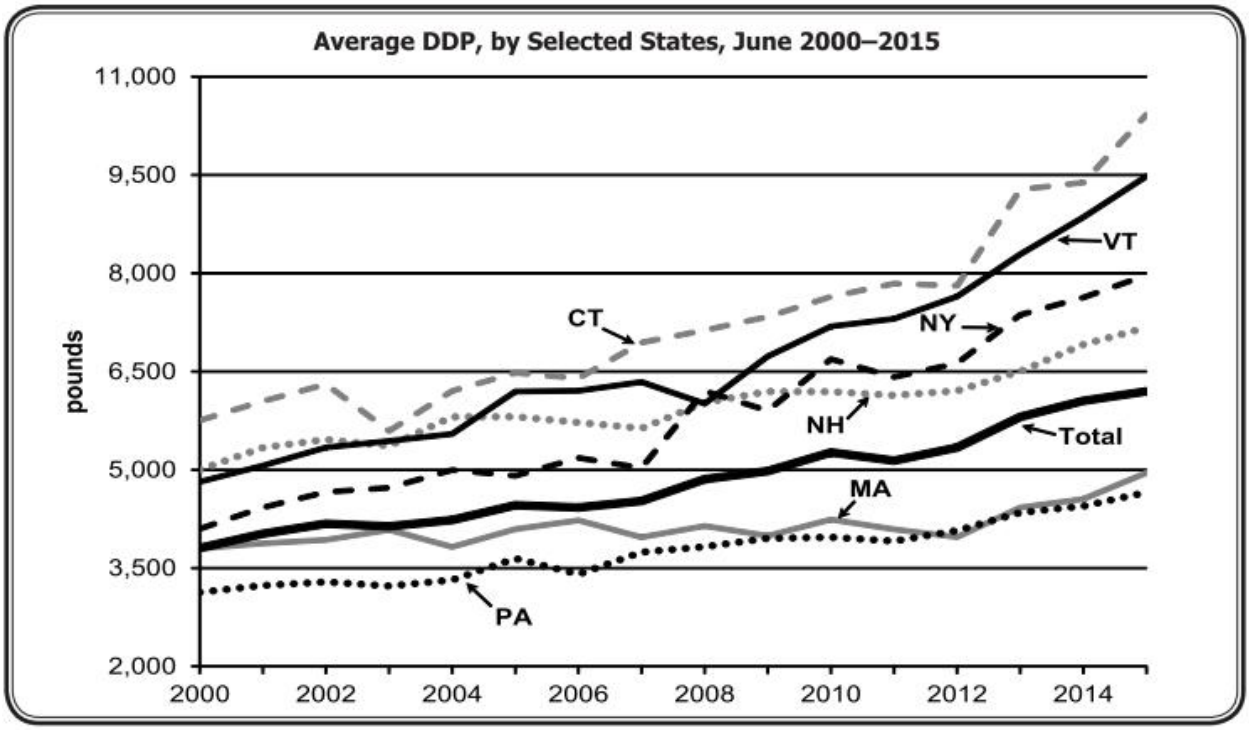

Figure 10: Average DDP, The Market Administrator's Bulletin – Northeast Marketing Area – Federal Order 1, July 2015

How producers market milk has also changed since the merger of the orders in 2000. In 2000, 26 percent of the milk marketed in the orders was by non-cooperatives, but in 2014, this amount was down to 17 percent. So while there are still a significant number of "independent" producers, there are fewer than in 2000. Many of those that remain have a dedicated supply relationship with a particular handler. As many of these handlers are fluid processors, to the extent their markets are shrinking, they may not need as many farms to supply them.

As shown in the Appendix, there were about 40 percent fewer cooperative associations operating in the Northeast in 2014 compared to 2000.

More milk is coming from a fewer number of producers, while there are fewer cooperative associations and in essence fewer marketing options for producers as some cooperatives are not currently taking on new members. While there are still a significant number of independent producers, the same is true for them in terms of fewer options for marketing their milk.

CHANGES IN REGION'S PROCESSING CAPACITY

Along with the consolidation of producers and buyers, there have also been significant changes in the processing sector.

The changes in consumers' milk consumption patterns have been a contributor to the changes in the processing landscape, particularly the decline in the number of Class I fluid plants, though industry consolidation may have played a role as well.

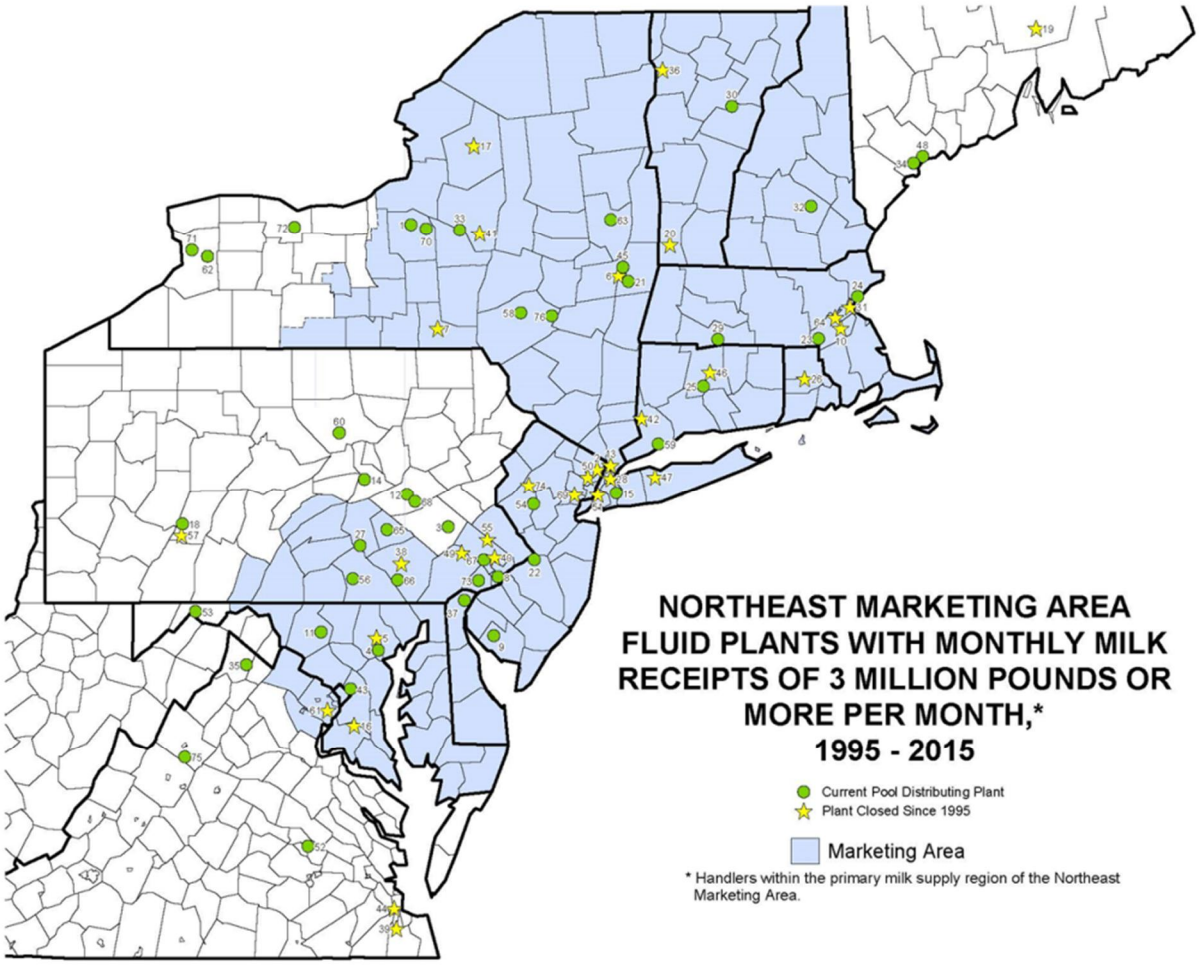

Figure 11: Northeast Marketing Area, 1995-2015. ***Note****: Handlers within the primary milk supply region of the Northeast Marketing Area. Prepared by Federal Order one staff, 2015.*

In the last 20 years, the number of plants in the Northeast has decreased by approximately 41 percent. The green circles in Figure 11 represent the current pool distributing plants still left within the Northeast while the yellow stars represent the plants closed since 1995.

For other product manufacturing plants, there have not been as many closures and some new manufacturing capacity has come on line in Vermont and New York. In Figure 12, the green circles represent current non-pool manufacturing plants. Plants closed since 2000 are represented by yellow stars and the red circles indicate plants opened after 2000.

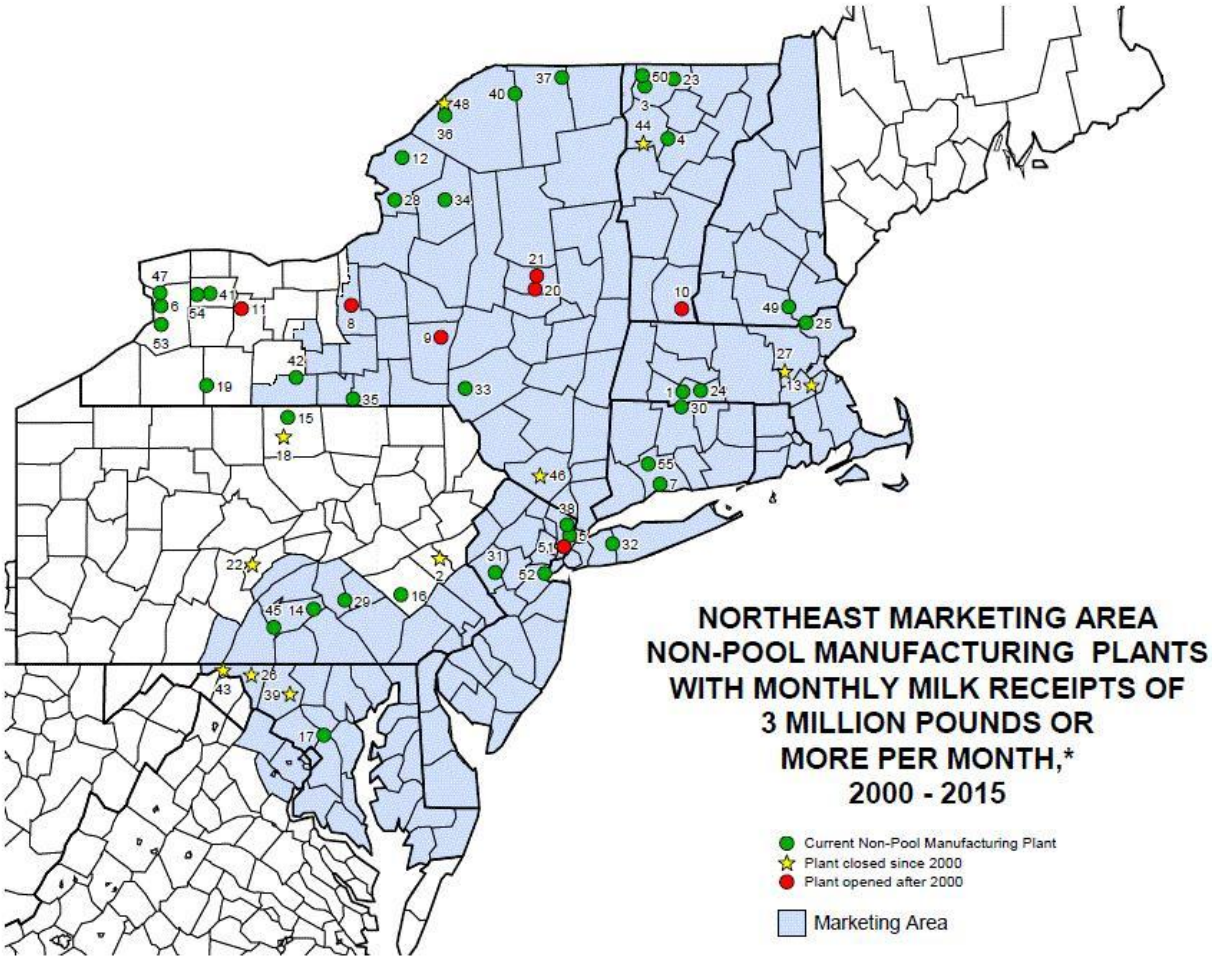

Figure 12: Northeast Marketing Area, 2000-2015. Prepared by Federal Order one staff, 2015

There have been a number of fluid plants that have closed in recent decades, reflecting consolidation and consumer demand; however there may be excess capacity in those plants that remain. Milk that would have been processed at those plants must now be processed at other plants in the region and at times this year has exceeded their capacity.

CONCLUSION

The first half of 2015 has been a challenge in the Northeast dairy industry as the region coped with more milk than it could process, farms faced a huge price drop, and for some, a loss of the market for their milk. A number of interacting variables, including changes in the industry structure have contributed to the current situation.

Along with the changes in industry structure have been significant changes in dairy policy over the last twenty years. Specific to New England was the Northeast Interstate Dairy Compact which operated from 1997 to 2001 and was followed by the national MILC direct payment program which was authorized in the 2002 Farm Bill and was in place until 2014.

The Federal Dairy Price Support program had been in place for decades but was discontinued in the 2014 Farm Bill and replaced with new Margin Protection Program, a type of margin insurance. It is unclear what the impact of the federal programs has been on the structure of the dairy industry and equally uncertain what the discontinuation of existing programs and impact of the new Margin Protection Program will be going forward.

From an administrative standpoint, the Federal Milk Marketing Order program and Federal Order One which covers the Northeast have implemented a number of temporary measures this year in response to the market situation, including special provisions related to the pooling of dumped milk that couldn't be processed so that it didn't need to be transported to a plant to be dumped, but could be disposed of on the farm.

In addition, the order had reduced the required shipping percentage requirements earlier in the year and had recently approved a reduction in the required shipping percentage for Fall 2015 in recognition of the declining Class I demand and availability of milk for fluid usage. While this adjustment is made in response to the current situation, it is possible that the underlying "shipping requirement" itself may have the effect of limiting marketing opportunities for producers and smaller cooperatives.

The shipping requirement provision of the order states that year around, a certain percentage of the volume that a cooperative or handler pools (10 percent increasing to 20 percent for the fall, though it has been adjusted to 15 percent each of the last three years) must be supplied to a Class I plant. A handler or cooperative must have access to a Class I pool bottling plant in order to remain qualified to be part of the pool so its producers can share in the higher price paid for the Class I milk. With fewer Class I plants, shrinking Class I demand, and the fact that some plants have full supply contracts with cooperatives, it has become difficult from some handlers to meet the order's shipping requirements.

In our discussion with knowledgeable experts in dairy marketing, there was no indication that there is a major paradigm shift in which individual farmers are now at greater risk in maintaining a secure market. While we understand their views, we believe that changing markets and

policies are such that ensuring a secure market is an increasingly important priority for all producers.

THE KEY ISSUES

As cooperatives, proprietary handlers and producers seek to manage the current supply demand situation in the Northeast, we believe these are some of the key issues at the root of the milk marketing situation in 2015:

1. Milk production nationally continues to grow. Recent years have seen a slowdown of the westward geographic shift in production nationally with a reversal year to date in 2015 although it is not clear if this is a temporary shift or the beginning of a longer term trend.

   At times this year milk production in the Northeast has exceeded the capacity of plants with markets for their end products. This raises questions going forward about the region's processing capacity if Northeast milk production continues to increase.

2. Consumers are shifting away from Class I (fluid milk) to other dairy products. Given the population centers in the Northeast, Class I has historically been an important market for the Northeast dairy industry and the effects of its continued decline are being felt this year and are likely to have a significant impact going forward.

3. There has been a consolidation of milk production and purchasing in the Northeast so farmers have fewer options for marketing their milk. While producer and processer consolidation has resulted in transportation and production efficiencies, some operations, both large and small, may face a greater challenge of finding a new buyer in an oversupplied market. Ensuring a long-term market for their milk is of increasing concern for dairy farmers and will require increased focus by producers in the future, especially those contemplating expansion.

4. The decline in Class I consumption has necessitated the region's milk to be processed into other products. A number of fluid plants have closed, and those that remain likely have excess capacity, but given the current consumption trends, it is not the kind of capacity required to process the region's milk supply as it continues to grow.

OUTLOOK

In essence the processing capacity in the Northeast may not match the market's current demands. With stable, but not robust demand for Class II (yogurt) and Class III (cheese), it has meant that milk has had to be absorbed by plants that can make other dairy products which can be stored. Class IV plants have been challenged to process the excess production and even so, may have marketing challenges for their products.

In the long-term, the Northeast dairy industry has many strengths such as access to markets, infrastructure and strong and innovative producers. Likewise, the long-term outlook for the U.S. dairy industry is positive as consumers across the globe increase consumption of dairy products.

In the short-term, there may be some challenges in the region such as balancing regional production growth with the current processing infrastructure given the current market trends.

NORTHEAST COOPERATIVES

Cooperatives Marketing in the Northeast as of December 31, 2000

Addison Cooperative Milk Producers Association Inc.
Agri-Mark, Inc.
Best Milk Producers Cooperative, Inc.*
Boonville Farms Cooperative, Inc.
Burke Milk Producers Co-operative Inc.
Butternut Farms Organic Coop Inc.*
Butternut Milk Group Cooperative, Inc.
Canajoharie Co-operative Milk Producers, Inc.
Canton Producers Cooperative, Inc.
Cape Vincent Milk Producers Cooperative, Inc.
Cedarville Milk Producers Cooperative, Inc.
Champlain Milk Producers Cooperative, Inc.
Chateaugay Cooperative Marketing Association, Inc.
Conesus Milk Producers Co-operative Association, Inc.
Cooperative Milk Producers Association
Cortland Bulk Milk Producers Co-operative Inc.
Coventry Producers' Cooperative, Inc.
Cumberland Valley Milk Producers Association
Dairy Farmers of America, Inc.
Dairylea Cooperative Inc.
Deer River Bulk Co-op, Inc.
Down State Milk Producers Cooperative Inc.
Empire-Keystone Milk Producers Cooperative, Inc.
Farmer Friendly Coop. Inc.*
Fingerlakes Milk Cooperative Inc.*
Georgetown-Sheds Milk Producers Cooperative, Inc.
Glen Milk Producers Cooperative, Inc.
Gouverneur Cooperative Dairymen, Inc.
H. P. Farmers Cooperative, Inc.
Independent Dairymen's Cooperative Association, Inc.
Interstate Bulk Milk Producers Co-operative, Inc.
Jefferson Bulk Milk Co-op Inc.
Jersey County Cooperative Inc.*
Kirkland Milk Producers Cooperative, Inc.
Konhokton Milk Producers Cooperative Association, Inc.
Lanco Dairy Farms Co-Op
Land O'Lakes, Inc.
Liberty Valley Cooperative Milk Producers Association
Lisbon Producers Cooperative, Inc.
Lowville Producers Dairy Cooperative, Inc.
Magic Valley Quality Milk Producers, Inc.
Malone Milk Producers Cooperative, Inc.
Marble City Bulk Milk Co-op. Inc.
Maryland and Virginia Milk Producers Cooperative, Inc.
Massachusetts Cooperative Milk Producers Federation, Inc.
Middlebury Cooperative Milk Producers Association
Mohawk High Protein Co-operative
Mohawk Valley Cooperative, Inc.
Mount Joy Farmers Cooperative Association, Inc.
National Farmers Organization
Niagara Milk Cooperative, Inc.
North Lawrence Milk Producers Cooperative Association, Inc.
North Penn Bulk Milk Producers Cooperative, Inc.
Northern New York Bulk Milk Producers Cooperative, Inc.
Northern Tier Farmers Union Milk Producers*
Oneida-Lewis Milk Producers Cooperative, Inc.
Oneida-Madison Milk Producers Cooperative Association, Inc.
Otselic Valley Milk Producers Co-operative Association, Inc.
Owasco Valley Milk Producers Cooperative, Inc.
Port Allegany Cooperative Milk Producers Assocation
Preble Milk Cooperative Association, Inc.
Producers' Co-operative, Inc.
Progressive Dairymen's Cooperative, Inc.
Rock Royal Cooperative, Inc.
Rockdale Producers Cooperative Association, Inc.
Scenic Mountain Milk Producers Cooperative Inc.
Schenevus-Elk Creek Producers Co-op., Inc.
Schoharie County Cooperative Dairies, Inc.
Seaway Bulk Milk Producers Coop. Inc.
South New Berlin Milk Cooperative, Inc.
Southern Tier Independent Milk Producers Co-op, Inc.
St. Albans Cooperative Creamery, Inc.
St. Lawrence Valley Bulk Milk Producers Co-operative, Inc.
Steamburg Milk Producers Cooperative, Inc.
Sullivan County Co-operative Dairy Association, Inc.
Syracuse Dairy Farmers Cooperative, Inc.
Tioga Valley Cooperative Bulk Milk Producers Assocation
Tughill Milk Producers Co-operative, Inc.
United North Country Bargaining Co-op, Inc.
Upstate Milk Cooperatives, Inc.
Westco Milk Producers Cooperative

* Cooperative does not have a USDA Capper-Volstead voting determination.

Cooperatives Marketing in the Northeast as of December 31, 2014

Addison Cooperative Milk Producers Association Inc.
Agri-Mark, Inc.
Boonville Farms Cooperative, Inc.
Butternut Farms Organic Coop Inc.
Cooperative Milk Producers Association
Cooperative Regions of Organic Producer Pools
Cortland Bulk Milk Producers Cooperative Inc.
Cumberland Valley Milk Producers
Dairy Farmers of America, Inc.
Down State Milk Producers Cooperative, Inc.
Empire-Keystone Milk Producers Cooperative, Inc.
Fingerlakes Milk Cooperative Inc.
Foremost Farms USA, Cooperative
H. P. Farmers Cooperative, Inc.
Jefferson Bulk Milk Co-op Inc.
Konhokton Milk Producers Co-operative, Inc.
Lancaster Organic Farmers Co-op
Lanco Dairy Farms Co-op
Land O'Lakes, Inc.
Liberty Valley Cooperative Milk Producers Association
Little Falls Milk Cooperative, Inc.
Lowville Producers Dairy Cooperative, Inc.
Maryland and Virginia Milk Producers Cooperative Association, Inc.
Massachusetts Cooperative Milk Producers Federation, Inc.
Michigan Milk Producers Association
Middlebury Cooperative Milk Producers Association, Inc.
Mohawk Valley Cooperative, Inc.
Mount Joy Farmers Co-operative Association
National Farmers Organization, Inc.
North Penn Bulk Milk Producers Cooperative, Inc.
Oneida-Lewis Milk Producers Cooperative, Inc.
Oneida-Madison Milk Producers Co-operative Association, Inc.
Organic Dairy Farmers Cooperative, Inc.
Port Allegany Cooperative Milk Producers Association
Preble Milk Cooperative Association, Inc.
Producers' Co-operative, Inc.
Progressive Dairymen's Cooperative, Inc.
Scenic Mountain Milk Producers Cooperative Inc.
Schenevus-Elk Creek Producers Co-op., Inc.
Schoharie County Cooperative Dairies, Inc.
South New Berlin Milk Cooperative, Inc.
St. Albans Co-operative Creamery, Inc.
Steamburg Milk Producers Cooperative, Inc.
Sullivan County Co-operative Dairy Association, Inc.
Tioga Valley Cooperative Bulk Milk Producers Association
United North Country Bargaining Coop, Inc.
Upstate Niagara Cooperative, Inc.
Westco Milk Producers Cooperative
White Eagle Cooperative Association