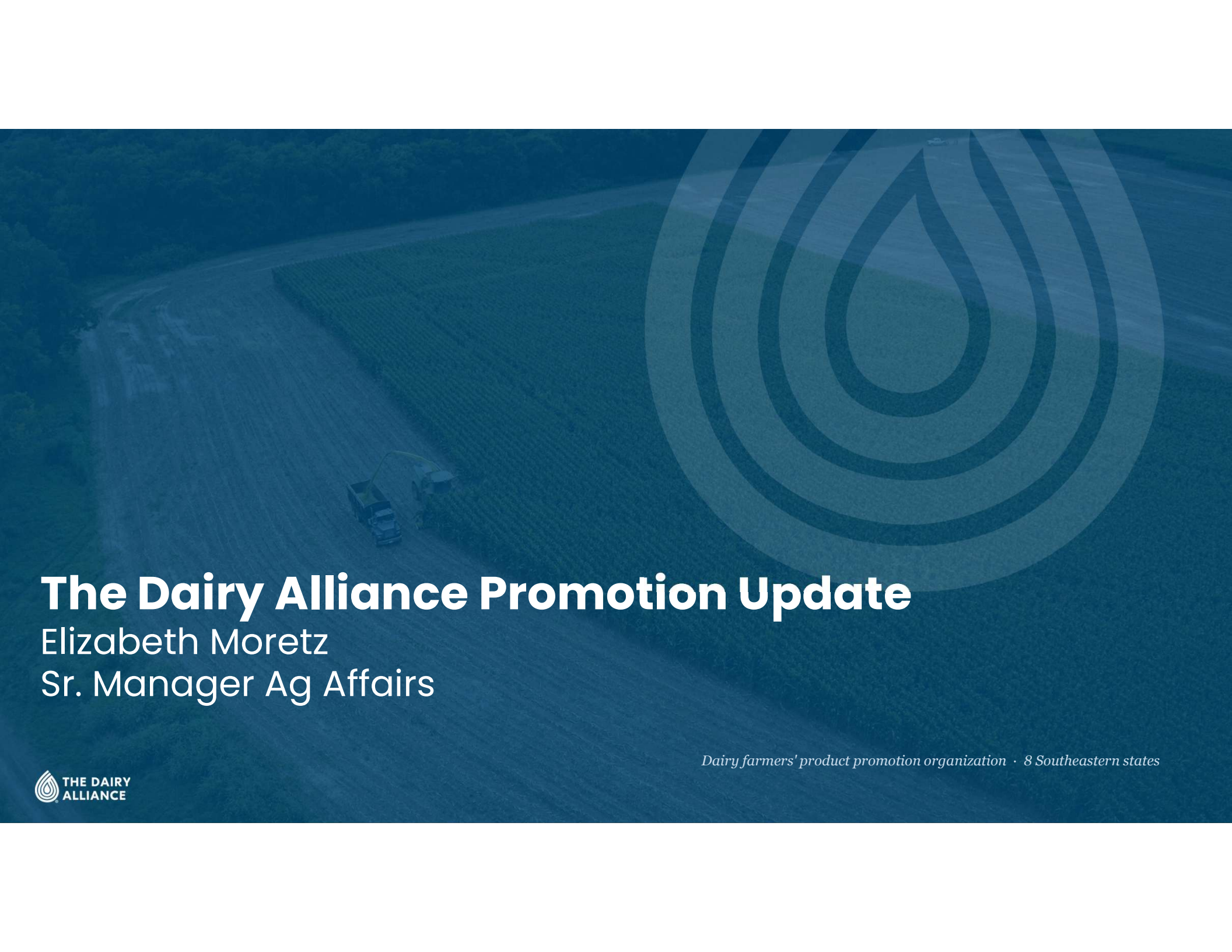


An aerial photograph of a dairy farm, showing a large blue teardrop-shaped graphic overlay on the right side. The teardrop contains concentric circles, resembling a target or a stylized drop. In the lower-left area of the teardrop, there is a small illustration of a blue truck and a green tractor. The background of the slide is a dark blue aerial view of a farm with fields and trees.

The Dairy Alliance Promotion Update

Elizabeth Moretz

Sr. Manager Ag Affairs



Dairy farmers' product promotion organization · 8 Southeastern states

WHO WE ARE

Our Mission & Funding



WHO WE REPRESENT

The Dairy Alliance is the dairy farmers' product promotion organization representing over 1,010 dairy farm families across 8 Southeastern states.



HOW WE'RE FUNDED

Funded through the federal checkoff by dairy farmers in Southeastern states — and by farmers in other states whose milk is marketed in our region.

Champion dairy demand and elevate dairy's image across the Southeast.

State and Regional

CHECKOFF ORGANIZATIONS



WHO WE ARE

About The Dairy Alliance Region

8

Southeastern states

57.7M

Regional population

~20%

of U.S. dairy consumed here

6.3%

Pop. growth since 2020

Demographics & Production

- 38% of consumers are people of color (21.9M)
- 21% of the population is Gen Z (12.1M)
- Four states rank in the U.S. top 10 for population growth
- 70–80% of milk processed in the region is Class 1
- Regional milk production is under 5% of the U.S. total
- Top milk-producing states: Georgia, Virginia, North Carolina



The Dairy Alliance region · 8 Southeastern states

2025 DAIRY FACTS

Southeast



The **TOTAL** amount of milk produced in 2024 equaled **667 million gallons**



Southeast is home to about **271,800 dairy cows** — producing an average of — **7.68 gallons of milk per day.**



Southeast has **1,065 dairy farms** and a typical dairy farm has a herd of about **334 milking cows.**

The average value of a day's milk per cow was about **\$15**

In 2024, a dairy cow in Southeast cost about **\$2,091.**



The most consumed dairy product in Southeast is **cheese** followed closely by ice cream.



**MAKING
EVERY
DROP
COUNT**



THE DAIRY
ALLIANCE

*All facts are based on 2023 USDA and NASS Data
*Compiled by UGA CAES Department of Agricultural and Applied Economics

National Averages (2024)

- 226 billion lbs (28B gallons)
- 9.3 million cows
- 7.7 gallons of milk/day
- ~25,000 total farms, ~300 herd size



THE DAIRY
ALLIANCE

Our Population is Greater Than Some Countries



Countries	Population
Germany	84,000,000
Thailand	72,000,000
United Kingdom	70,000,000
France	67,000,000
South Africa	65,000,000
Italy	59,000,000
The Dairy Alliance	57,000,000
South Korea	52,000,000
Spain	48,000,000
Argentina	46,000,000
Canada	40,000,000

**Projecting + 1.4 Million each
year over the next 3 years**

WHO WE ARE

What is The Dairy Alliance?



Established 1971

Originally managed 25 separate promotion organizations across 4 states, known as the **Southeast United Dairy Industry Association (SUDIA)**.



8 State ADAs

Manages dairy checkoff programs on behalf of 8 state **American Dairy Association** boards across the Southeast.



1 Office · 35 Staff

Headquartered in **Atlanta** with 35 full-time staff — more than half working from home offices across the 8-state region.

WHO WE ARE

Leadership



Farrah Newberry

CHIEF EXECUTIVE OFFICER

Leads The Dairy Alliance's staff and regional checkoff strategy across the 8-state Southeast.



Michael Ferguson

BOARD PRESIDENT

Mississippi dairy farmer. Leads the Board of Directors in setting policy, strategy, and financial oversight.

PARTNERSHIPS

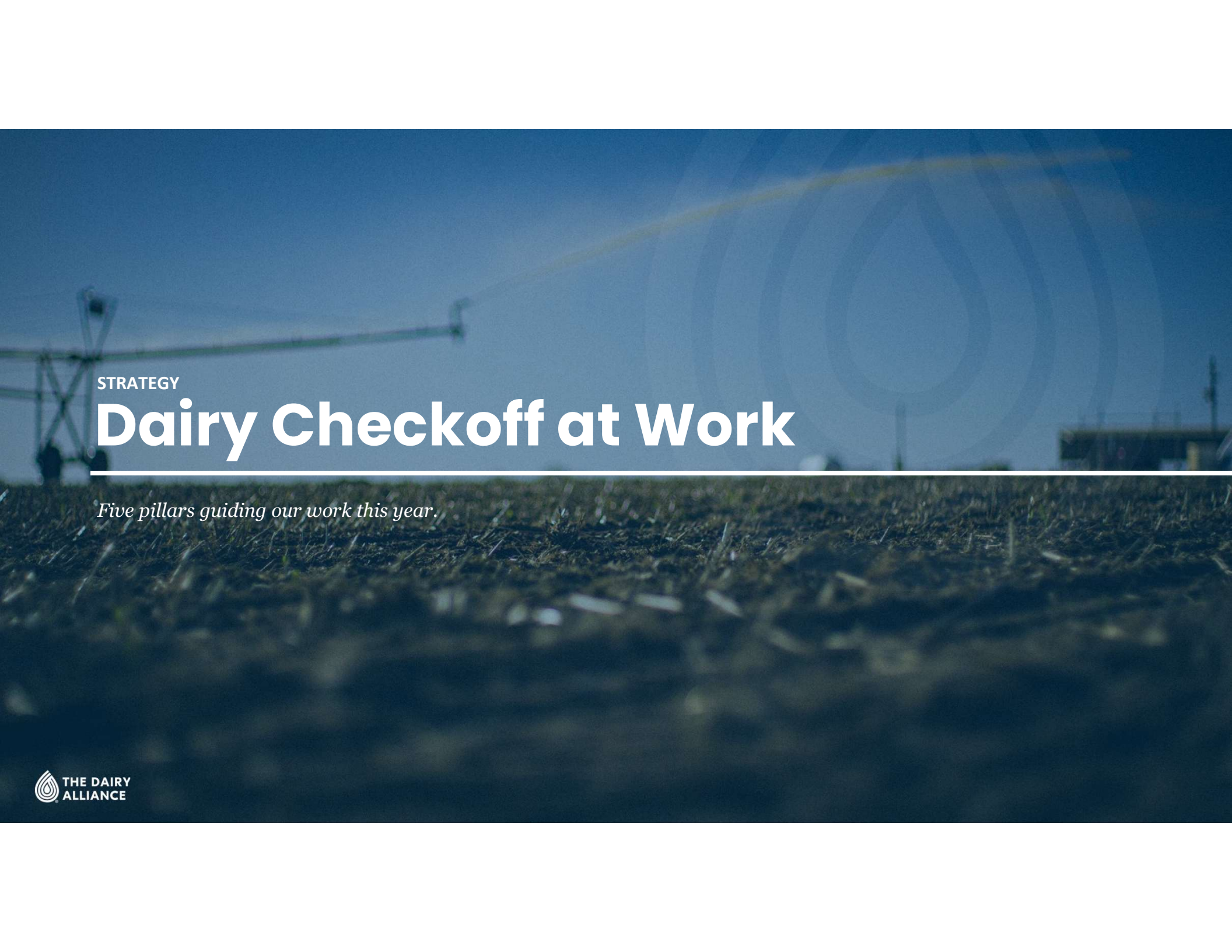
Policy & State Trade Partners

The Dairy Alliance works alongside state agriculture organizations across the Southeast to advance dairy.



We also work with state *Farm Bureaus, Cooperative Extension, and Departments of Agriculture.*





STRATEGY

Dairy Checkoff at Work

Five pillars guiding our work this year.



Growth

Protect and grow milk volume by promoting dairy's health & wellness benefits and driving dairy menu innovation.



Reputation

Improve perception of dairy & dairy farming with an emphasis on nutrition and sustainability.



Innovation

Develop science & innovations that advance U.S. dairy's wellness and product leadership.



Sustainability

Strengthen the competitive edge of Southeast dairy farmers by encouraging climate-smart practices.



Investors

Cultivate impactful relationships with farmers that foster increased support of the checkoff.

GROWTH

Protect and grow milk volume by promoting dairy's health and wellness benefits and driving dairy centric menu innovation.



High-Quality Protein Campaign
75M total impressions



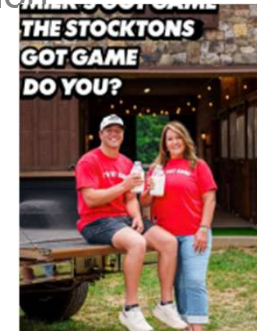
Lactose-Free Campaign
106M total impressions



Multicultural Dairy Holiday Traditions Campaign
22M total impressions



Instacart Holiday Campaign
22% of consumers back to the milk segment
4.1M lbs. of Milk Sold
1.8M total impressions



Milk's Got Game®
343M total impressions



Tik Tok Recipes
1.7M total views



GROWTH

Protect and grow milk volume by promoting dairy's health and wellness benefits and driving dairy centric menu innovation



**Milk's Got
Game 2025
Results:**

**343M
Impressions!!**





Virginia High School League Partnership 2025/26 State Championship Events



Outdoor Track
Championships



Football
Championships



Basketball
Championships

Generated
19.7 million
PR
impressions
and counting!

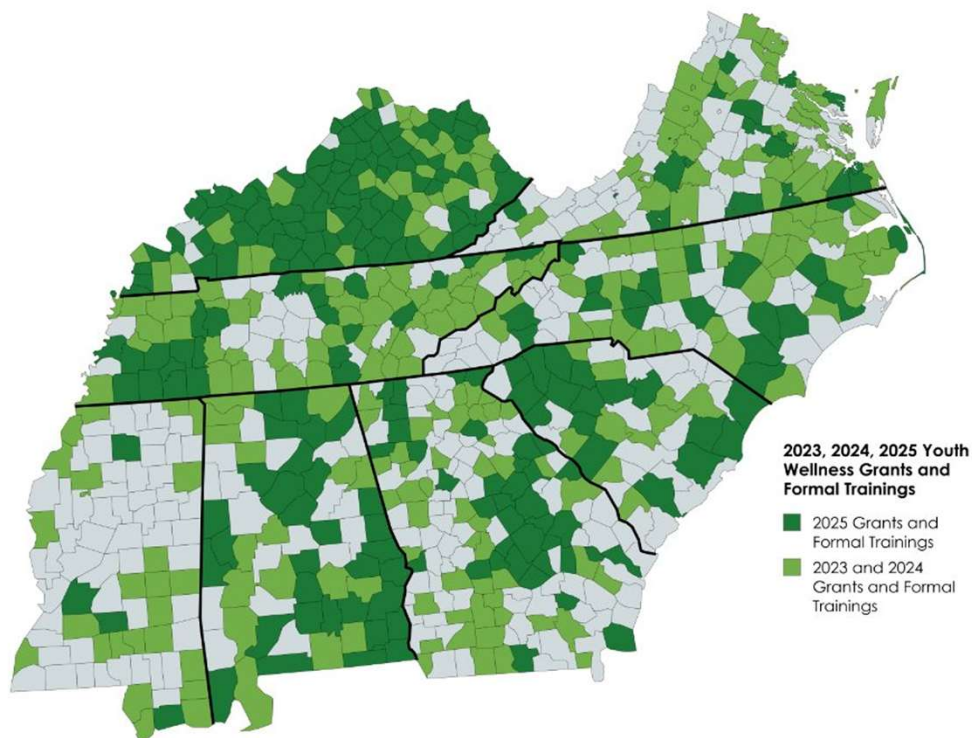
Distributed
more than
1,200 pints of
Maola
chocolate
milk to
student-
athletes!



GROWTH

Improving the school milk experience for students

- Moo Brew^(TM)
 - Smoothies
 - Strive for 35
 - Milk Dispensers
-
- 404 grants awarded
 - 555 districts engaged





Moo Brew



Smoothies

Slide 16

MP1 plug partners that funded milk dispensers
Mekenzie Panhans, 2026-02-20T18:28:08.846

GROWTH

Improving the school milk experience for students

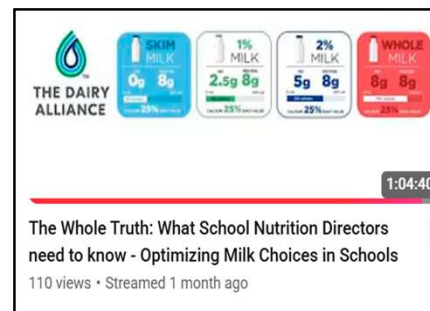
Milk Dispensers placed in 222 schools in 94 districts across the Southeast



Partner Organizations:

Tennessee Dept of Ag; Virginia State Dairymen's Association; Georgia Agricultural Commodity Commission;
Georgia Milk Producers and The Dairy Alliance Dairy Optimization Grants





Regional Whole Milk
Education Webinar



Milk dispenser equipment grants
awarded to schools across
10 school divisions this year.

Dairy Academy featuring Smart Swaps Recipes

Dairy-centered recipes district-wide across
31 schools for National School Breakfast Week



1st Udderly Cold Portable Units
in VA debut at UVA



REPUTATION

Improve perception of dairy & dairy farming through thought leader engagement with an emphasis on nutrition and sustainability



5 live Virtual Farm Tours (VFTs) across GA, TN, AL, NC, and VA in 2025

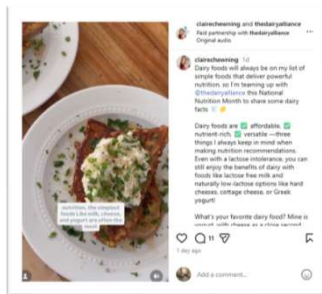
- Engaged mostly science teachers, providing dairy-focused, STEM-aligned classroom resources.
- **Achieved a 10.26% average increase in trust** across four trust-related questions
- Participants entered with positive views and left highly motivated to share the dairy story

"I loved the sustainability connection to the industry as a whole."

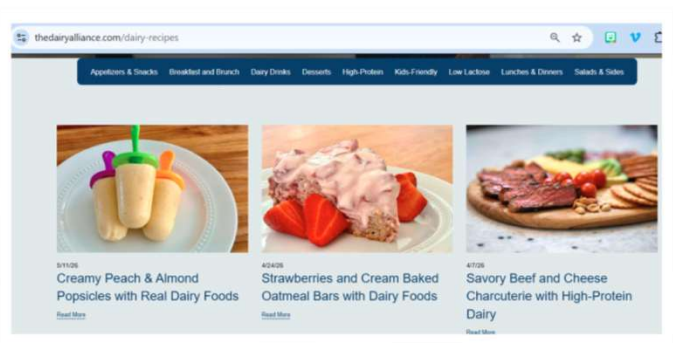
—NC Virtual Farm Tour Participant

Adopt a Cow: Registration now open!
Reached over 555,000 students





Virginia Academy of
Nutrition and Dietetics
Exhibit & speaker
sponsorship with sports
nutrition expert Marie
Spano



VA dairy advocate,
Claire Chewning, RD, released 4 social
posts sharing dairy key messages and
added 4 fluid milk-based recipes to our
collection

Richmond TV Segment co-sponsored
with Virginia Beef, highlighting dairy as
an affordable source of high-quality
protein. Led by Dairy Advocate Caroline
Thomason, RD



UVA Pediatrics Conference exhibit
& break sponsorship



Virginia Beach Shamrock Marathon

Engaged with **24,000 participants** through a multi-day activation at the Sport & Fitness Expo and Shamrock Marathon

- Sports nutrition education; dairy promo items
 - **3.4 million organic social media impressions**
 - **5.1 million Meta ad impressions**
 - **5.6 million PR impressions, with a PR value of \$130,288 AVE.**

In partnership with **PET Dairy**, The Dairy Alliance reintroduced chocolate milk at the finish line for the first time in four years.



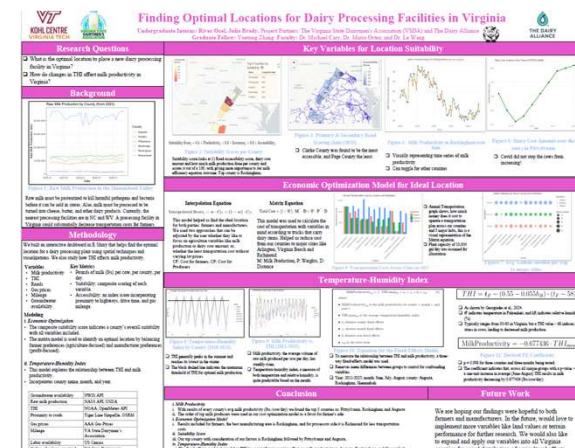
INNOVATION

Develop Science and Innovations That Advance U.S. Dairy's Wellness and Product Leadership



Southeast Dairy Foods Research Center

- Fluid milk revitalization-school milk
- Role of on-farm/virtual farm tours on consumer perceptions
 - Resulting in NCSU mobile dairy museum
- Consumer drivers of purchase
 - RTD coffee beverages
 - Differing temperature treatments

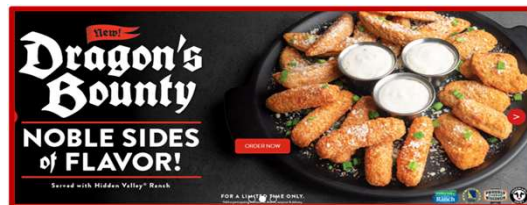
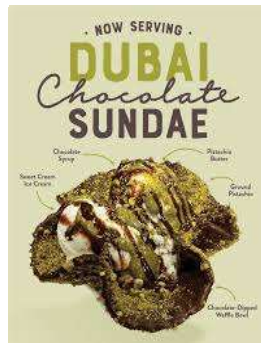


INNOVATION

Develop Science and Innovations That Advance U.S. Dairy's Wellness and Product Leadership

Business Development: Driving Dairy Growth Through Menu Innovation

2025



2026



Got Clean Water Campaign

Leveraging private and public funding sources to assist farmers in adopting BMPs (Maola; Alliance for the Chesapeake Bay; Sustainable Chesapeake; TDA; ADANE)

Campaign runs April-June (Earth Month, National Dairy Month)

Paid ads on social, boosted by Maola, PR, in-person activations; integration into Year of the Woman Farmer

Results:

- 1.2M reached, 4,600 engaged
- 53 media pick-ups, reached 20M

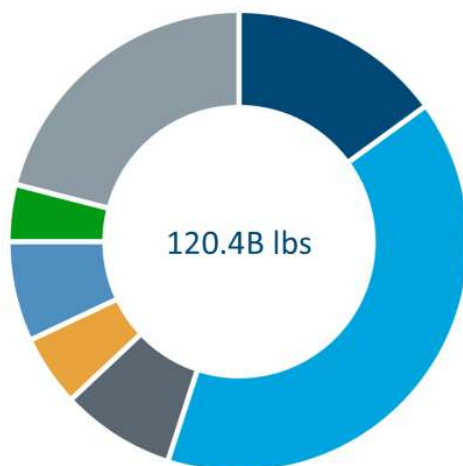


INDUSTRY CONTEXT

Commercial Dairy Usage Has Grown

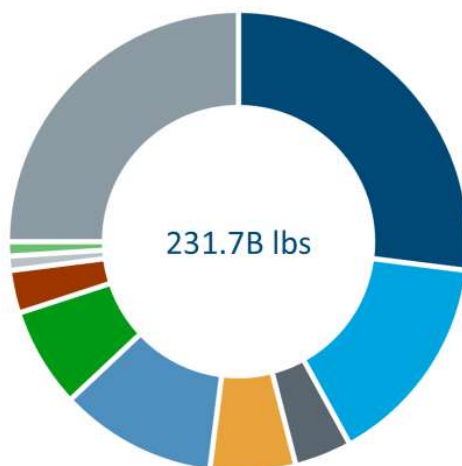
Total use has nearly doubled since 1983 (+92%) — and the product mix has shifted toward cheese.

1983: 120.4B lbs



Cheese 15% → 27% · Fluid milk 40% → 15%

2025: 231.7B lbs



	1983	2025
Cheese	15%	27%
Fluid milk	40%	15%
FZ products	8%	4%
Butter	5%	6%
Dry whey	7%	11%
Dry milk	4%	7%
Yogurt	—	3%
Sour cream	—	1%
Cottage cheese	—	1%
Other	21%	25%

Your Checkoff is Building Trust & Driving Sales

Partnerships

\$7.87
RETURN
On Each
\$1 Spent

Your checkoff team collaborates with leading restaurant partners, including Domino's, McDonald's and Taco Bell, to innovate and highlight dairy across menus, driving sales nationwide.

Whole Fat Science

\$34.68
RETURN
On Each
\$1 Spent

More than 80 checkoff-funded studies on whole milk and whole milk dairy foods over the past two decades have helped educate consumers on the health benefits and nutritional value of full-fat dairy.

Fluid Milk Innovation

\$6.39
RETURN
On Each
\$1 Spent

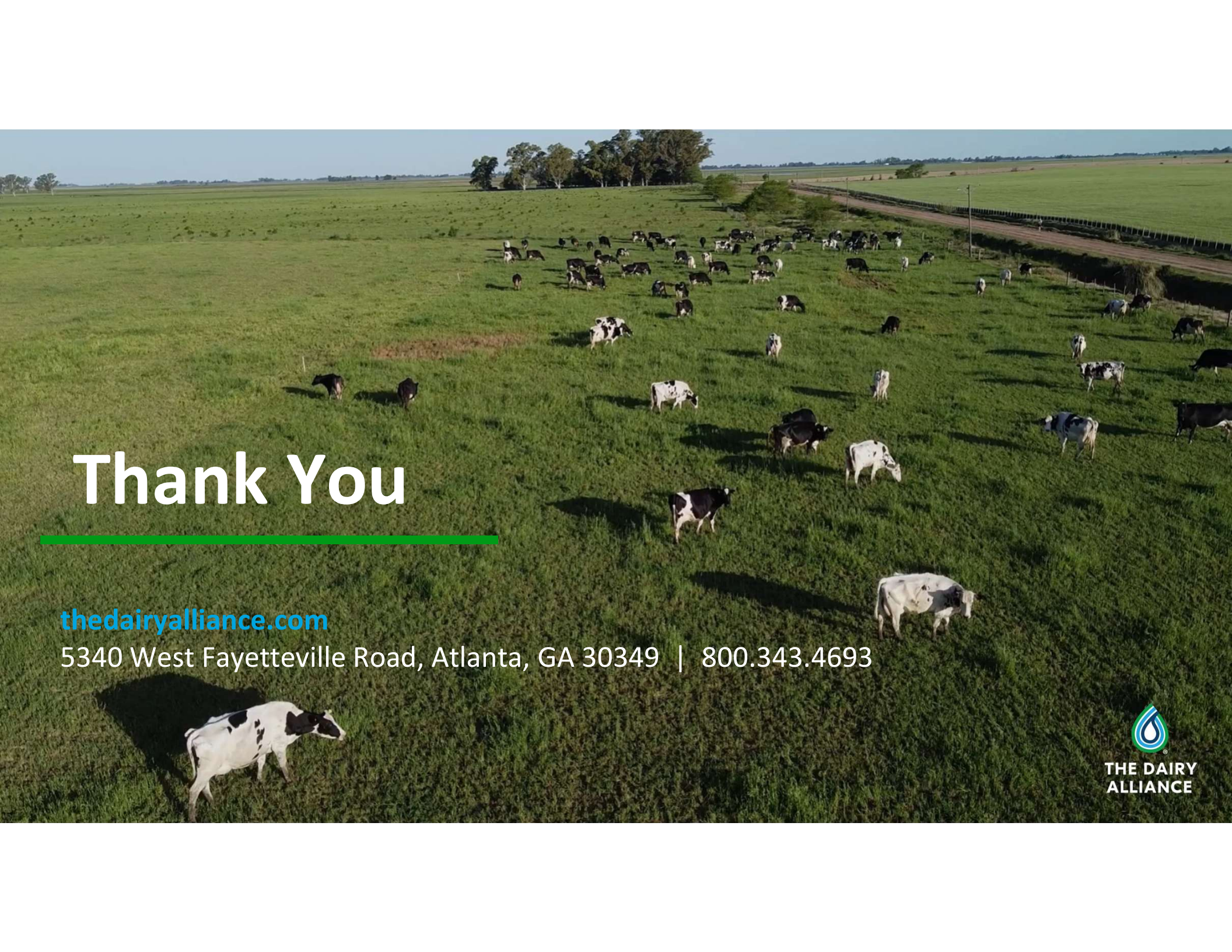
Checkoff-funded research is helping drive milk innovation such as ultra-filtered, lactose-free, reduced-sugar and high-protein options that consumers are seeking.

Exports

\$9.30
RETURN
On Each
\$1 Spent

Since U.S. Dairy Export Council was formed by checkoff in 1995, exports have grown tenfold to represent 17% of domestic milk production and position U.S. dairy as a major global player.

ROI shown as return-to-\$1. Areas analyzed on available data; timeframes and data sets vary by area.



Thank You

thedairyalliance.com

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THE DAIRY
ALLIANCE