

2003 Accomplishments & Activities National Milk Producers Federation



Executive Summary

Here are just a few of NMPF's major accomplishments last year:

- Creating a unique new supply-and-demand balancing program, Cooperatives Working Together, to help improve low producer prices (*page 2*)
- Working to strengthen the dairy price support program by proposing changes that will prevent the farm-level price from dropping below \$9.90/cwt. (*page 2*)
- Gathering more support for legislation restricting the imports of Milk Protein Concentrate (MPC) and Casein (*page 5*)
- Developing a new dairy proteins program to encourage the production of a domestic supply of Milk Protein Concentrate (*page 5*)
- Continuing to defend the integrity of standards of identity for cheese, ice cream and yogurt (*page 4*)
- Helping to ensure that mad cow disease in the U.S. does not adversely affect dairy operators (*page 4*)
- Urging Congress to provide maximum funding for the new Johne's disease program (*page 4*)
- Seeking the best-possible treatment of the U.S. dairy production sector as the White House negotiates trade deals within the World Trade Organization, and with Australia, Chile and Central America (*page 6*)

CEO's Comments

I am never more proud of what our organization has done on behalf of America's dairy farmers than when I have the opportunity to summarize, in this newsletter, the many accomplishments we've achieved in the past year.

2003 was another busy, productive year for NMPF - as each year is, in its own unique way - and there's a great deal of ground to cover in this report. As always, I hope that the producers and cooperative employees who review our report get a better understanding of the breadth of activities in which our staff is engaged on a consistent basis.

NMPF is truly a full-service membership organization that applies its resources in many areas of critical importance to dairy producers. Just like farmers themselves, we have to earn our keep every day, in ways that you'll read about inside.

- Jerry Kozak, President and CEO



Cooperatives Working Together

The dairy price plunge that began in 2001 reached an even more perilous point in 2003, as prices fell to the lowest level since 1978. Every dairy producer across the country was under extreme financial duress, and many looked to NMPF to do something to rectify an intolerable situation.

Last July, dairy farmers took a historic step by coming together to fund a producer-led program to take control of milk pricing by managing the supply of milk and dairy products in the domestic market. The program was called Cooperatives Working Together, or CWT.



Dairymen representing 70% of the nation's production pledged to invest five cents per hundredweight to CWT so that three supply reduction programs could be initiated. CWT began to impact the market long before any actual reductions in production or supply were made. Last summer's announcement that CWT was going forward created anticipation, resulting in a surge in cheese prices that lifted farm-level prices from their record lows.

Using a combination of programs to reduce milk supplies, CWT moved forward last fall in an effort to reduce the nation's milk supply by 1.2 billion pounds, or 0.7%. By last October, CWT's Herd Retirement program removed 33,000 cows – or the equivalent of 608 million pounds. Also in October, CWT's Reduced Production Marketing program began to compensate producers for reducing their milk output over the coming 12 months by 87 million pounds. At the end of 2003, CWT's third prong, Export Assistance, began to reward bonuses for the export of up to 30 million pounds of cheese, and 10 million pounds of butter.

The combined impact of CWT's reduction efforts is expected to return an average of \$0.59 per cwt. for all producers, putting more than \$1,014,000,000 in farmers' pockets between Oct. 2003 and this September. What's more, the program helped demonstrate that farmers can help themselves by working hand in hand to solve tough economic problems.

Economic Policy

Supporting the Price Support Program

One of NMPF's biggest successes in 2002 was extending the price support program in the Farm Bill. Last year, making the program work up to its potential was major priority. As it has in previous years, NMPF aggressively fought reductions in the USDA purchase price for nonfat dry milk price through another price support tilt, and there were no such reductions in 2003. However, USDA failed to keep the market price of cheese milk from falling below support last spring, and the agency ignored NMPF's proposed solution to this problem.

In February, an NMPF survey showed strong evidence that selling to USDA under the price support program costs processors an extra 5½¢ per pound for cheese, 2¼¢ for nonfat dry

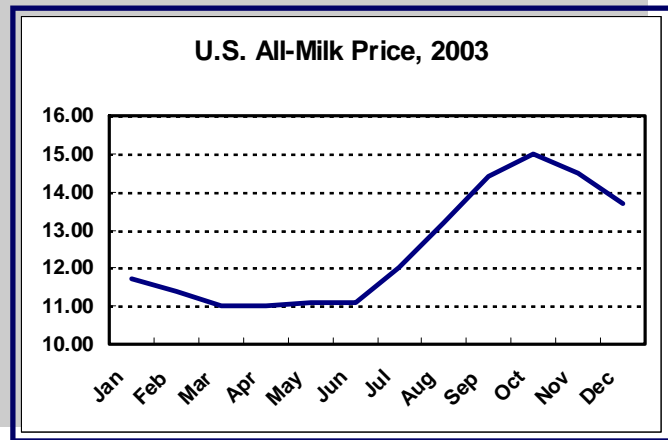
milk, and 1½¢ for butter. On this basis, NMPF proposed that USDA raise the support prices for these three products, so that plants could afford sell to the government and afford to pay the milk support price, as the program intends. USDA has been unwilling to act on this request, and it remains an NMPF priority.

The best defense against another tilt is shrinking the government's stocks of nonfat dry milk. In 2003, those stocks did decline – by 175 million pounds – for the first time in seven years. NMPF continues to support USDA programs that make good use of this powder without disturbing our dairy markets.

U.S. Dairy Proteins Program

In recognition of two intractable facts: there is a growing domestic demand for high-protein dairy products, and the buildup of USDA powder stocks is a political and economic albatross - NMPF is pushing for a new program that will address both these concerns.

Last May, NMPF submitted a proposal to USDA to create a domestic dairy proteins program, which would provide assistance to processors who create casein and high end milk protein concentrates. Although the program would need government support in its initial phase, it also should produce a net savings for USDA, by replacing nonfat dry milk purchases with assisted processing of surplus milk into protein and protein concentrates. NMPF's proposed proteins program has attracted positive interest in USDA and Congress, but no action on USDA's part. NMPF continues to pursue implementation of this program as a priority issue.



The U.S. all-milk price dropped last year to the lowest level since 1978, before staging a comeback in the last half of the year – partly due to the impact of NMPF's Cooperatives Working Together program.

Federal Milk Marketing Orders

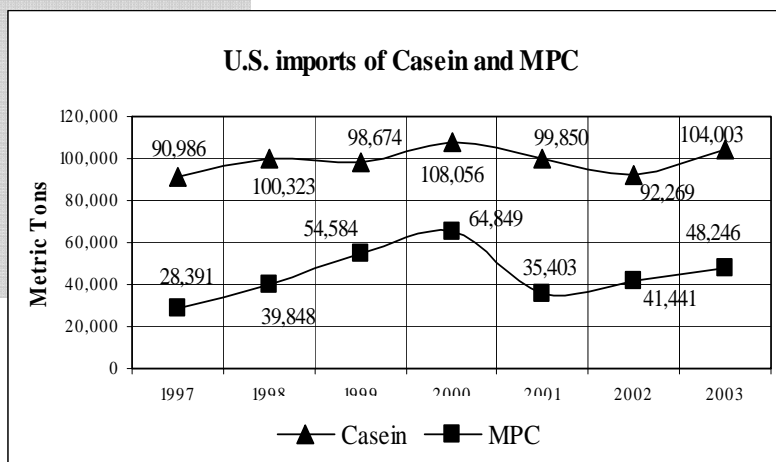
Given the importance of the Federal Milk Marketing Order system to dairy coops and producers, NMPF established a new Federal Order Working Group in 2003, which met for the first time in October. The group, made up of Federal Order experts from the staff of member cooperatives, is pursuing several action items on Federal Order issues, including determining the appropriate definition of Class I products, and speeding up the Federal Order hearing process.

Last year, NMPF offered important input for the Federal Order hearing on limiting the producer-handler exemption in two western markets. The decision expected from this hearing is likely to set an important national precedent, denying large processors the opportunity to use this exemption as a loophole to avoid making their fair contribution to market-wide pools.

Dairy Export Incentive Program

NMPF was successful in 2003, for the first time in three years, in convincing USDA to use the DEIP to export butterfat. USDA issued invitations to export a total of 10,000 metric tons (22 million lbs.) of butterfat during the 2002-2003 DEIP marketing year, and the entire quantity was exported. The U.S. is permitted to export 21,097 tons of butterfat per year, and NMPF expressed concern that the USDA should have used the entire annual allocation. This concern was amply underscored when USDA purchased 11 million pounds of butter under the price support program, which the Department should have exported under the DEIP, but which it sold back into the do-

mestic market instead, to the detriment of U.S. dairy farmers. NMPF's ongoing complaints about USDA's delay and micro-management of the DEIP program bore some fruit in 2003. The 2003-2004 DEIP allocations for nonfat dry milk and cheese were announced in two stages, compared with three stages during the prior year.



MPC and casein imports continued to flow unabated into the U.S. dairy market in 2003, reaching their third-highest volume ever, following a downturn earlier in the decade. NMPF continues to push for legislation in Congress that would impose tariffs on imports of these dairy protein products that dampen producer prices.

Product Standards and Food Safety

National Conference on Interstate Milk Shipments

The National Conference on Interstate Milk Shipments (NCIMS) met last year to address the 150 proposals submitted to revise the *Pasteurized Milk Ordinance* (PMO) and its related documents. NMPF staff attended the conference to advocate positions of interest to dairy cooperatives and their producer members.

Several positive proposals of significance were passed. One allows automatic milk systems on farms. Another was for a pilot program that will allow states to contract with a third party to conduct NCIMS work for foreign facilities. This proposal is intended to require foreign firms to meet the same requirements as U.S. firms before Grade "A" products can be shipped into the U.S. After a state has implemented this program, they should be better able to keep illegally imported products from entering the U.S. A significant proposal NMPF lobbied to terminate was a proposal to lower the regulatory limit for somatic cells in the PMO to 400,000. This proposal failed, and the current regulatory limit of 750,000 remains in place.



Food Security

As a result of the Public Health Security and Bioterrorism Preparedness and Response Act of 2002, the FDA established several new rules to further help protect the nation's food supply. The first rule requires food facilities to go through a one-time registration process with FDA. A food facility is defined as an operation that manufactures/processes, packs, or holds food, including dairy products. This does not include farms.

The second rule requires that FDA receive prior notice of food imported into the U.S. The purpose of this is to allow FDA to review the information and determine whether to inspect the imported food. While the Customs and Border Protection Bureau already is provided with this information, the addition of having FDA review the notice of imports will help strengthen food security.

Farm Security

NMPF continues to work with regulatory agencies at the Federal and State levels to protect the U.S. food supply from intentional contamination. NMPF, in cooperation with the International Dairy Foods Association (IDFA), developed voluntary guidelines to help producers increase security on their farm. The *Voluntary Guidelines for Security of Raw Milk at the Farm* document is intended to help prevent safe milk from being unnecessarily destroyed. These guidelines focus on areas where raw milk is stored on the farm

when the dairyman or their employees are not present at the facility. These guidelines serve as a companion to the previously released *Voluntary Guidelines for Sealing Raw Milk Tankers*.

Dairy Product Standards

A number of petitions have been sent to FDA to change the standards of identity for dairy products. NMPF has analyzed petitions to change cheese standards, the yogurt standards of identity, and the standard of identity for ice cream. In each case, NMPF has sent letters to FDA objecting to any of the changes that would adversely impact either dairy producers or dairy product quality. As a result of NMPF's objections, the FDA has not made any changes to current dairy product standards of identity.

International Dairy Standards

NMPF continued to work within the Codex Alimentarius Commission (CAC) and its Committees, as well as with the

International Dairy Federation, to ensure that no international standards are adopted that would adversely impact U.S. dairy exports and to make sure that no imported products are given preferential treatment at the expense of domestic producers.

Last year, the Codex Alimentarius Commission (CAC) accepted as final regulations a number of international dairy product standards that had been approved by the Codex Committee on Milk and Milk Products. These include: establishing a class name for "milk protein" with a minimum level of 50% milk protein as well as final standards for Creams, Prepared Creams, Fermented Milks, and Whey Powders.

If not handled properly, changes in Codex rules will create future Technical Barriers to Trade for the U.S. dairy industry.



Animal Health and Care

Bovine Spongiform Encephalopathy (BSE)

The cattle industry was stunned in 2003 by the discovery of two Canadian cows with BSE, or mad cow disease, including one that was discovered after leaving a dairy in Mabton, WA.

The first case, diagnosed last May in a beef animal in Alberta, led to the closing of the U.S. border to Canadian beef and live cattle exports. NMPF worked last year to ensure that all the necessary precautions were taken prior to the reopening of the border to live cattle imports, such as dairy heifers. To date, the border remains closed to cattle, eliminating a significant source of new dairy replacements.

In response to the single case of BSE in Washington State announced three days before Christmas, NMPF staff worked with USDA, FDA, and state agencies to ensure all relevant information was provided to the investigators. In addition, NMPF worked as part of a crisis management team (consisting of NMPF, DMI, USDEC and IDFA) to minimize any impact on dairy products. NMPF also is addressing the various changes to existing rules regarding nonambulatory animals, food ingredients, and feed ingredients.

Animal Identification

NMPF serves on the United States Animal Identification Plan (USAIP) Steering Committee that is facilitating the advancement of this uniform national animal identification plan. The USAIP is being developed to facilitate more complete and timely tracking of animals within 48 hours of any animal health-related emergency. The Steering Committee met throughout last year and has developed a working document for review by the entire livestock industry. The intent is to develop the capability for the government to monitor all animal movements without requiring information utilized for making herd management decisions.

Animal Welfare

NMPF continued to work with the Milk and Beef Dairy Quality

Assurance Center to distribute the *Caring for Dairy Animals*

Technical Reference Guide, the animal welfare guidelines for dairy producers. Last year, the Food Marketing Institute (FMI) and the National Council of Chain Restaurants (NCCR) developed the Animal Welfare Audit Program (AWAP) as the next step to verifying animal care. NMPF was opposed to their program and met several times with FMI and NCCR to express our concerns about the AWAP system. Because of objections from NMPF and other livestock groups, the push for on-farm audits has lessened. However, some food companies are beginning to ask their suppliers to verify on-farm animal care. NMPF continues to support the concept of voluntary audit programs as these voluntary programs will be the most feasible for dairy producers.

Johne's Disease Control

NMPF worked with Congress to authorize in the 2002 Farm Bill a five-year Bovine Johne's Disease Control Program, beginning in FY 2003. NMPF also sought increases in funding for this new national Johne's program to \$20.4 million and \$21.3 million, in the House and Senate, respectively. NMPF has worked with USDA-APHIS to utilize funding provided in 2003 to begin implementation of the National Johne's Control Program.

NMPF also worked with the U.S. Animal Health Association and the National Johne's Working Group on refinements to the "Uniform Program Standards for the Voluntary Bovine Johne's Disease Control Program." These minimum standards were released by USDA in April of 2002, and continue to serve as the basic standards which states use to administer the new Johne's disease control program.

NMPF also continues to encourage USDA to place a high priority on Johne's disease research. Through the USDA Competitive Grants Program, a genome research project has enabled the University of Minnesota to recently announce the ability to sequence the genome of *Mycobacterium paratuberculosis*, the bacteria that causes Johne's disease. The results of this gene sequencing breakthrough will enable researchers to develop more sensitive early detection diagnostics and more effective prevention and treatment regimes to control Johne's disease.

Foot-and-Mouth Disease (FMD)

Working through the FMD Dairy Research Working Group and in cooperation with USDA and FDA, the Federation is developing guidelines for addressing an outbreak of FMD in the U.S. Pasteurization studies have been initiated by USDA at its foreign animal disease laboratory in Plum Island, New York, to determine the time and temperature conditions that will destroy FMD virus in milk taken directly from FMD infected animals. The FMD Working Group is also overseeing efforts at ARS to vali-

date the use of advanced detection technologies to be able to rapidly detect FMD virus in milk and milk products.

Regional Dairy Quality Management Alliance

NMPF is addressing a number of animal health and well-being related issues, including improvement of dairy beef safety and quality, through a pilot project in the Northeast and Mid-Atlantic region. Ten states have signed a Memorandum of Understanding to commit educational, training and laboratory assistance to producers who voluntarily sign contracts with the State to develop a Herd Health Plan. Uniform BMP's are being developed through an Oversight Committee following the direction provided by the New York State Cattle Health Assurance Program.

Funding from the Agriculture Research Service of USDA has been obtained to initiate two on-farm epidemiological studies of biosecurity, biocontainment, food safety, and animal health. The purpose of these 5-year studies is to scientifically support recommended best management practices.

Environment

EQIP Program

The Natural Resources Conservation Service (NRCS) of the USDA issued its final rule for the Environmental Quality Incentives Program (EQIP) last year. NMPF submitted comments during the rulemaking process. The final rule had some changes that make the program more accessible for dairy producers. In part because of NMPF's work with Congress, funding for EQIP greatly increased from \$400 million per year in FY 2002, to \$1.3 billion per year in FY 2007. There were problems with the number of requests exceeding the available funds; however, USDA later reallocated an additional \$36 million from the Farm Bill to be used specifically for the EQIP. NMPF continues to work with NRCS to ensure that the money stays committed to the program.

NRCS National Animal Agriculture Conservation Framework

NMPF, along with other livestock organizations and the USDA, began an initiative to create a National Animal Agriculture Conservation Framework. The document is intended to provide producers with explanations of the possible options to help them foster environmental stewardship. The document is also meant to show NRCS' commitment to ensuring livestock producers receive assistance to improve their operations' environmental practices, while maintaining an economically viable operation.

Trade

NMPF's major accomplishments in 2003 included a concerted effort to educate Congress and the Administration about the dairy industry's trade policy principles, as well as intense efforts to ensure that agreements – bilateral and multilateral – were negotiated in our industry's best interests. This was possible due to a high level of cooperation with the U.S. Dairy Export Council and active involvement by NMPF members.

Milk Protein Concentrate (MPC) Legislation

NMPF aggressively pursued two MPC bills in Congress: one in the House, H.R. 1160, and an identical bill in the Senate, S. 560. Both bills would simply apply the same tariff rate quotas currently assessed on related dairy products (such as skim milk powder) to MPC and casein used in the food and animal feed industries. NMPF staff has worked with members of Congress to develop legislation that is WTO-consistent to curb future additional imports and continues to work with key members of the Senate and the House to move this legislation to a floor vote.

In addition to broadening the support of these bills, NMPF has actively participated in the ongoing investigation by the U.S. International Trade Commission on the conditions of competition for milk protein products in the U.S. market. The investigation was requested by the Senate Finance Committee last May in order to help clarify the need for the dairy tariff legislation.

MPC Customs Petition

In response to the lack of standards for Milk Protein Concentrates and the circumvention of our tariffs, NMPF pursued efforts through the U.S. Customs Service to close the MPC enforcement loophole. In April 2003, the Customs Service rejected NMPF's petition under Section 516 of the U.S. Tariff Code to modify the tariff classification of certain MPCs. As a result, NMPF has initiated a legal challenge to the U.S. Customs Service ruling in the International Court of Law.



Canadian Dairy Exports

After a six-year process of challenging Canada's dairy export scheme in the World Trade Organization, subsidized Canadian exports into the United States came to a halt last year (although a few non-quota holding milk producers in Canada have made attempts to continue to export to the U.S.). In order to avoid any potential exports by non-quota holders, NMPF contacted the Ontario Agricultural Minister, who declared shortly thereafter that all production and exports by non-quota holders should cease as of November 30, 2003. NMPF continues to communicate with members concerning instances of perceived violations by Canada of the WTO ruling.

Import Promotion Assessment

NMPF has worked closely with the Administration since the determination by USTR that the 2002 Farm Bill assessing the domestic dairy check-off on imported products is not currently WTO-compliant. NMPF has worked with USTR and USDA to develop an acceptable remedy. NMPF continues to lobby Congress to achieve this goal so the assessment can be properly applied to dairy imports, which currently derive the benefits of the check-off program without bearing any of its costs.

Trade Adjustment Assistance (TAA)

NMPF aggressively pursued available options to help alleviate the burden on U.S. producers of additional imports by petitioning for Trade Adjustment Assistance (TAA) on behalf of dairy producers in several states. The Trade Act of 2002 established the TAA for Farmers program, which began last year. TAA provides for USDA to give technical assistance and cash benefits to eligible farmers if increased imports have contributed importantly to a price decline of more than 20 percent. NMPF's petition clearly demonstrated how increased levels of imports have contributed significantly to lower producer prices. We are currently awaiting a response from USDA about the approval of NMPF's petition.

Australian Free Trade Agreement

One topic of considerable focus was the Free Trade Agreement between the U.S. and Australia. NMPF has pursued multiple avenues to convey its strong opposition to this agreement to Congress and the Administration. NMPF testified at an International Trade Commission hearing in January about the damage this agreement could cause. We also spoke before the U.S. Trade Representative's staff about the potential job loss impact of the FTA. NMPF sent a letter to every member of Congress last year explaining the harm the dairy industry is posed to suffer, and affirming that this FTA would offer no net benefit to U.S. agriculture.

World Trade Organization negotiations

To ensure that Congress was aware of the dairy industry's position, NMPF testified before the House Agriculture Committee regarding the WTO and other trade agreements. NMPF also embarked on a Congressional education program to inform our representatives about the need for balanced trade and not unilateral disarmament.

Through intensive lobbying efforts throughout the negotiating process, NMPF was successful in ensuring that the U.S. government's WTO proposal is consistent with the U.S. dairy industry's priorities. These include the elimination of export subsidies, harmonization of over-quota tariffs while maintaining tariff-rate quotas, and while maintaining the ability to support producers, seeking the removal of existing disparities in domestic supports.

Foreign Market Access

In cooperation with the U.S. Dairy Export Council, NMPF applied pressure to foreign governments as well as U.S. regulatory staff to resolve regulatory issues hindering U.S. exports.

In addition, NMPF closely monitored events in the European Union (EU) to ensure that the EU's enlargement by 10 members in the spring of 2004 does not adversely impact market access for US exports. This effort will continue



Political Action Committee



NMPF PAC activity picked up in 2003, as we added several individual contributors from among NMPF board, staff, and member cooperative's staff, and producers. This enabled the PAC to slightly increase its contributions to candidates, both Senatorial and in the House of Representatives as they geared up for 2004 elections. While, there were no House or Senate elections in the "off-election year", 2004 promises to be a very busy one from a political perspective.

The entire House stands for election, approximately one third of the Senate is up for election, and the Presidential race is already well underway. The PAC will try to repeat its excellent winning percentage history.

The political arm of the NMPF will be just as important as ever, with a host of challenges facing the dairy producer community. We strive to build relationships on Capitol Hill that will enable dairy producers and cooperatives to have their voices and concerns heard.

Annual Meeting

The 2003 NMPF Annual Meeting was held in New Orleans, Louisiana November 2 - 5. This year brought industry influentials from all over the country to see how policy and promotion work together. The theme of the meeting was Our Industry, Our Future. The issues focused on keeping the momentum of the industry headed in the right direction. The meeting kicked off with speaker Archie Manning, NFL Legend, who spoke about building a winning team. It set the tone for a positive forum where policy and promotion continually work together.

Other meeting highlights included:

- Election of Chairman Charles Beckendorf following the stepping down of Tom Camerlo, after serving 18 years as NMPF Chairman
- Update on CWT program activities
- YC Leadership Development Program with 110 men and women involved this past year



Jerry Kozak was auctioned off as a farm hand to raise money for the NMPF scholarship fund. Paul Rovey won the bid and helped NMPF in raising over \$10,000 at this year's meeting.

Young Cooperators Program

The YC Program has always been a very important program within NMPF. Each year, young men and women come together from across the country to make friends, improve their leadership skills, and learn about the role NMPF plays in the dairy industry. NMPF hosts two events for this group, one during the summer board meeting, and one during the annual meeting.



Darren Turley asks a question during the Town Hall session with NMPF staff at the annual meeting. Darren and his wife Deanna will serve as the 2004 YC Chaircouple. They are DFA members from Dublin, Texas.

Last July, 55 YC's met in Washington, DC for the annual leadership forum. They sat in on the NMPF board meeting and planned the YC portion of the annual meeting in November. They also had an overview of how each department of NMPF benefits their industry. They applied this information and

were able to lobby on Capitol Hill. They spoke to their congressmen and women about the important issues and established themselves as dairy contacts in their home districts.

At the Annual meeting, the 108 YCs in attendance focused on improving their communications skills. Joan Horbiak gave a dynamite presentation that worked with and encouraged the YC's to improved their understanding of the media and the importance of delivering a clear, compelling message. This training gave the YC's the tools to become spokespersons for the dairy industry in their community and around the country. The YC's were also given another opportunity to speak with the NMPF staff during a town hall meeting. They were also given the opportunity to partake in various aspects of the NMPF/DMI joint annual meeting. By learning how policy and promotion work together, the YC's gained a better understanding of the the full circle of players in the industry. We plan on continuing and strengthening this program in 2004 to provide the YC's with leadership development.

Dairy G.R.E.A.T

The Dairy GREAT program has proved to be a successful tool in helping dairy farmers communicate with their elected officials about important legislative issues. This system allows our members to write to their Congressmen, or the President himself. It is also an excellent tool for members to learn more about the legislation important to the dairy industry.

The number of participants in this program has grown steadily in the past year and our use has



grown by leaps and bounds. A few cooperatives have links from their website to the Dairy GREAT website. In the coming years we hope to double this number. Check for a great spot on your website to include our logo and link to the Dairy GREAT homepage.

It is easy to sign up to receive our updates by going to the website, either click on the icon at the NMPF homepage or simply go directly to the website at capwiz.com/nmpf/.



Vision:

The Federation uses its unique resources to harness the ever-changing political and marketing environments to enhance and promote the economic well-being of dairy producers and their cooperatives through coordinated industry efforts.

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