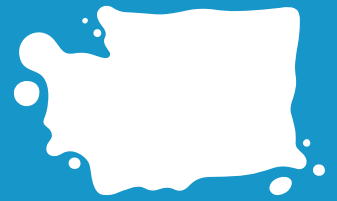


# 2023 YEAR IN REVIEW

DAIRY FARMERS OF WASHINGTON



# A LETTER FROM OUR LEADERSHIP

In 2023, the team at Dairy Farmers of Washington (DFW) advanced dairy through four new strategic pillars: reputation, sustainability, innovation, and exports. These priorities, embraced across Checkoff, underscore our commitment to driving positive impact locally, nationally, and globally. Informed by insights from our farmer leaders and grounded in market analysis, our initiatives are designed to yield tangible benefits for our dairy community.

This report highlights how we've championed dairy as a nutrient powerhouse integral to a sustainable food system with our key audiences. It also demonstrates how we've partnered with our processors and brands to deploy targeted marketing campaigns and launch consumer-centric product innovations to bolster domestic and international sales.

At DFW, we're fueled by a dynamic team dedicated to delivering results that matter to our farmers. I'm proud of the initiatives executed on your behalf in 2023, setting the stage for dairy's success in 2024 and beyond. Thank you for entrusting us as your voice in the marketplace.



Steve Seppi, Executive Director  
steve@wadairy.org

## 2023-2025 CROSS-CHECKOFF STRATEGIC PRIORITIES

REPUTATION	SUSTAINABILITY
Revitalize dairy's image and relevance as a source of human nourishment and societal and planetary health.	Demonstrate dairy as an environmental solution, supported by science and evidence, and economically beneficial for all.
INNOVATION	EXPORTS
Develop technology-powered breakthroughs through science and innovation that advance U.S. dairy's wellness and product leadership.	Ensure U.S. dairy maintains its position as a growing, reliable, and preferred supplier in key global markets.

## 2023 CROSS-CHECKOFF RESULTS

<b>5,684</b> <b>FARMERS &amp; FARM ADVISORS</b> empowered to pursue sustainability action	<b>+10.6</b> <b>AVG UPLIFT* IN PERCEPTION</b> that dairy is produced in environmentally responsible way	<b>150MM+</b> <b>LBS IMPACTED</b> through existing food service partners	<b>20</b> <b>NEW PRODUCTS</b> launched & funded by check-off	<b>\$8.11B</b> <b>2.2M MT MSE</b> U.S. Dairy Export Sales
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*\*Source: Mischief Campaign Brand Lift Study, Feb 2024*

2023 was a challenging year for our dairy farmers; milk prices regressed from where they were the year prior, due in part to a challenging export market, while input costs remained elevated. Even with significant headwinds, our farmers demonstrated their perseverance and commitment to their herds, their people, and the communities they serve. And I believe there is a bright future ahead with domestic consumption being strong over the past year and exports trending upward.

In this report, you will see the work your staff does to drive innovation and build a thriving market for our products. We have a strong board in place that is committed to maximizing your checkoff investment — if you have any questions or feedback, please reach out to me or any of our board members.



Lana Smaczarz, Board Chair  
lana@wadairy.org



# REPUTATION

We reimagined dairy within the ethos of sustainable nutrition — beneficial for consumers, communities, and the planet. Our mission: build trust, especially among younger consumers who typically skew more toward neutral or negative perceptions of dairy, by showcasing dairy's role in a responsible lifestyle. Through digital channels, we worked to change perceptions, presenting dairy as both a vital part of our diets and in sustainability. This approach resonated widely and amplified our message, as reflected in our over 225 million total impressions.




## DIGITAL MEDIA


### Media Campaigns

Our ads targeted millennial parents with nutrition messaging drawing on nostalgia with retro games and schooltime as inspiration. By leveraging MilkPEP assets, we maximized industry resources to ensure milk is both relevant and enjoyable with younger audiences. Our social campaigns and creative highlighted dairy's nutritional benefits and our industry's commitment to sustainable practices.



**63MM+** impressions

 **14.7MM+** views  
**3.9MM+** engagements




*Impressions* = number of consumers who may see content  
*Engagement* = interaction with a post (like, share, comment...)

### Influencer Program


We partnered with a wide range of influencers, from millennial moms to Gen Z's favorite gamers and makeup artists. They were encouraged to creatively highlight where local dairy comes from, its value, and fun consumption methods. Allowing influencers to craft their own narratives highlighted dairy's versatility and appeal through authentic and diverse content that resonated with their (and our) audiences.



**15** influencers

 **14MM+** impressions

**2MM** engagements



## Influencer Event

We hosted an influencer event at Werkhoven Dairy, where eight influencers dove into farm life, including the hands-on experience of bottle-feeding calves. This experience not only offered insights into animal care and sustainable farming but also helped foster a deeper appreciation for modern agriculture among influencers and their audiences. The day culminated in a cheese and wine tasting in collaboration with the Washington Wine Commission, followed by a dinner on the farm, fostering connections with local farmers and celebrating local ingredients.

 **2.5MM+** impressions | **105k+** clicks



## EXPERIENTIAL



**1.2k+**  
consumers  
attended



**+50%**  
average sales  
for processors

**500K+** impressions through paid ads

## Whatcom this Whey Dairy Tours

In the second year celebrating National Dairy Month with Whatcom County dairy tours, we introduced more sales elements directly on the farms and hosted visitors from as far as Canada and Denmark. Attendees met with local cheesemakers, dairy farmers, and processors, gaining insights through educational tours covering topics from cow care to innovative and responsible farming practices.

## Ag Day at Washington State University

At the WSU vs. OSU football game in Pullman, we celebrated Washington agriculture with the Beef Commission, highlighting local dairy and beef production. A big thanks to Beecher's Handmade Cheese for their flagship cheddar donation, and to dairy farmer Dan DeRuyter for grilling hundreds of cheeseburgers for the fans. It was a great day of sports, community, and Washington agriculture pride.



cheeseburgers served to  
**250+** consumers



# PARTNERSHIPS

## Washington Interscholastic Activities Association



Continuing our partnership with the WIAA, we directly engage student-athletes and coaches, highlighting chocolate milk as the ultimate refuel beverage. Event activations, such as at state cross-country, complement our efforts to share engaging content and provide valuable nutrition resources, like our sports nutrition manual. We're also able to provide sports nutrition education to coaches across WA through coaches' school. Through these initiatives, we're able to showcase the significance of dairy in promoting an active lifestyle, in line with WIAA's mission to enrich student lives through sports.



student athletes refueled with **12K+ BOTTLES** of chocolate milk

**3MM** digital impressions

reached →

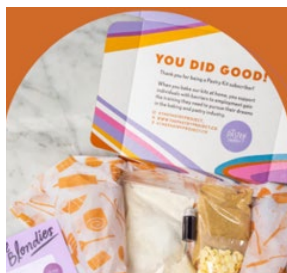
**4k**

coaches' school attendees with sports nutrition information

## The Pastry Project



Our collaboration with The Pastry Project supports free baking training for members of the community with barriers to employment and provides product coupons for local dairy products to over 600 kit subscribers, incorporating our dairy messaging. On National Ice Cream Day, we delighted the first 100 visitors with complimentary cones at their soft-serve window, adorned with recycled Darigold milk jugs decorated by Bellevue Boys and Girls Club.



**600+** monthly kit subscribers

## Tom's Turkey Drive



Tom's Turkey Drive with 2nd Harvest enabled the distribution of 6,800 Thanksgiving meals across Spokane, Mid-Columbia, and Yakima Valley. Instead of a single-day event, meals were given out over several days by 24 partner food banks, closer to homes. Each box included Darigold milk, with dairy farmers Stephanie and Derek Littrel enhancing our reach through media appearances on KREM 2 News at Starbucks and Rosauer's locations.



**6.8k+** 1/2 GALLONS of Darigold milk donated

digital content reach over **210k+**

**32k+** article reads

## PacificSource Partnership



In collaboration with the Oregon Dairy Council (ODC) and Dairy West, we've joined forces with PacificSource, a major health plan provider serving over 500,000 members across Oregon, Washington, Idaho, and Montana. Our objective is to integrate dairy education into PacificSource's existing program for children and families, aiming to educate pediatricians and parents about the nutritional benefits of dairy. We'll provide valuable content for their online hub, helping foster a deeper understanding of dairy's role in a healthy diet. This partnership has played a crucial role in our planning process, and we're anticipating its launch in January 2024.

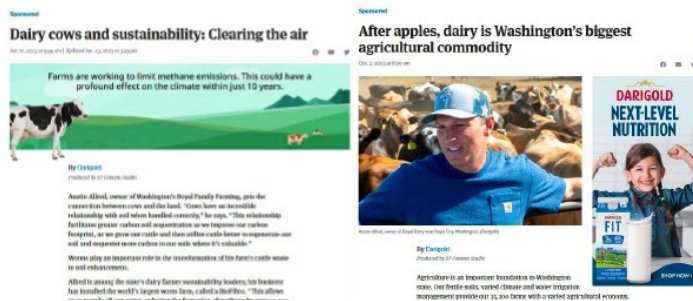


# MEDIA

## Seattle Times Partnership



DFW and Darigold teamed up with the Seattle Times to spotlight the significance of dairy farming in our state. The first piece showcased key sustainability initiatives, such as methane reduction, underscoring their environmental importance. A second article looked at dairy's role in Washington's economy and its connection to local communities. By amplifying farmers' voices, these features not only showcased their unwavering dedication but also cast a spotlight on their substantial impact. These articles highlight a unified effort towards sustainable farming and celebrate the contribution of dairy to the region.



**21.4MM+** digital impressions  
**43k+** digital article reads

## Earned Media

### National Dairy Month

In promotion of the Whatcom this Whey Dairy Tours, FOX 13 Good Day Seattle broadcast live from Twin Brook Creamery for 2 segments to discuss the farm tour along with cow care and sustainability. The in-studio segment and Studio Live show had local cheesemakers Daniel and Nidia Wavrin showcasing their locally made cheese and promoting the event for consumers to visit to learn more. FOX 13 is rated as the #1 morning news in our local market.

### National Ice Cream Day with The Pastry Project

FOX 13 hosted Heather Hodge, co-founder of the Pastry Project, in studio to talk about their organization and how they are supporting their community while promoting celebrating National Ice Cream Day with DFW. The anchors raved about how delicious the soft serve was, highlighting the success of our event and the undeniable appeal of dairy.

## Local Lens

Partnering with KING 5's Local Lens, we brought attention to local events bridging dairy farmers and local food scenes. Through our Whatcom this Whey dairy tours, host Kelly Hanson looked into the farms and creameries featured on the tours. We also highlighted how cows and by-products energized Elysian's Great Pumpkin Beer Fest and Pumpkin Weigh-off, working closely with Kranick Dairy from Enumclaw. This collaboration underscored the practice of upcycling by-products and utilizing manure and fertilizer to help grow giant pumpkins.



**59k** views on YouTube | average view duration over **3** minutes



## Earthworms and Sustainability

KAPP-TV in Yakima featured a news segment and story about local dairy farmer Austin Allred's innovative use of earthworms to enhance sustainability on his farm. The report highlighted vermifiltration, a technique where earthworms aid in waste management and soil health and demonstrated its impact on modern dairy farming practices.

### Earthworms and cattle, how one Washington dairy is boosting sustainability with cattle wastewater

Feb 9, 2023 (Updated Feb 9, 2023)



ROYAL CITY Wash. -- Expansive views and farm land soon as far as the human eye can see in Royal City, Washington.

## SUSTAINABLE NUTRITION RESOURCES

### Department of Health (DOH) Watch Me Grow Program

We continue to distribute our brochures on milk's benefits and dairy's role in childhood development in English and Spanish. In 2023, we added an incremental brochure to the Watch Me Grow program expanding our dairy messaging reach to parents across Washington. The new brochure pictured below includes sustainability messaging and allows us to reach households with children aged 5.5 years. Our three mailers are sent to new parents and partners through the DOH Watch Me Grow program, helping prepare for well-child visits. We continue to offer our infant feeding guide, aligned with the latest Dietary Guidelines for Americans, featuring dairy-friendly meal ideas for little ones aged 6 to 23 months.

**Nutrients Help Me Grow!**

- Brain:** Helps support my brain power.
- Teeth:** Helps keep my teeth strong and healthy.
- Muscles:** Helps keep my muscles strong and healthy.
- Bones:** Helps keep my bones strong and healthy.
- Skin:** Zinc helps keep my skin healthy.
- Eyes:** Vitamin A helps keep my eyes healthy.
- Immune System:** Vitamin D helps keep my immune system healthy.
- Heart:** Potassium helps keep my heart healthy.
- Energy:** B vitamins help keep my energy levels up.
- Stomach:** Calcium helps keep my stomach healthy.
- Bones:** Calcium helps keep my bones strong and healthy.

**From the Farm to My Table**

**Compost & Feed:** Farmers use compost to enrich their soil and feed crops. This helps them grow healthy food for people.

**Recycle & Compost:** Recycling waste at home helps protect the environment.

**Grocery Store:** Once food is ready to go, it's in the grocery store for purchase.

**Table:** Eating healthy foods helps my brain.

**You can help too!** Don't let your food go to waste! Compost your own or use a community composting center. The trash should go to a recycling center.

**100k+ WA parents reached through pediatric care specialist program**

## SCHOOLS & UNIVERSITY CONNECTIONS

### Dairy in the Classroom

#### STEM Curriculum



In collaboration with ODC, DFW offered STEM immersive experiences for educators, emphasizing dairy's role in health, sustainability, and local economies. New learning materials were developed that aligned with Next Generation Science Standards to empower educators to integrate dairy topics into classrooms. During a pilot session in August 2023, 18 educators visited PNW dairy farms and processors, where they received valuable support for integrating dairy-related lessons into their classrooms. Plans are underway for continued exchange of materials and immersive experiences throughout 2024.



18 educators participated in pilot



## Wheat Week Integration

In collaboration with Wheat Week, DFW is integrating dairy education into lesson plans, impacting an average of 20,000 4th and 5th graders annually. DFW has actively worked to incorporate dairy education into the curriculum for this academic year and engaged with educators to plan more immersive experiences focused on dairy in the Spring. This ongoing effort marks just the beginning of our commitment to making the inaugural year of this program a success.

## Adopt a Cow

Entering its third year, our Adopt a Cow program continues to connect students with the world of dairy farming. This year, we partnered with the Baginski family, who dairy in Othello, and offered students an educational experience that goes beyond the classroom and allows them to gain valuable insights into cow care, milk production, and sustainable farming practices.

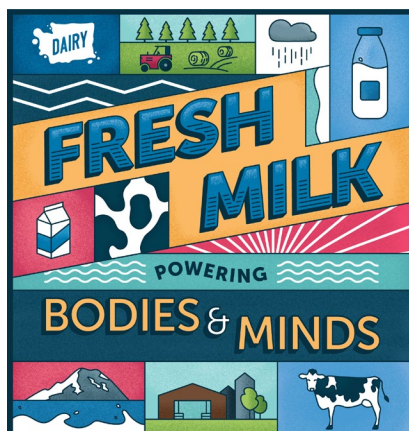


445 WA classrooms | 10.5k+ WA students

## Dairy in the Cafeteria

## K-12 Start Strong Grants

The Start Strong grant program has made big strides, awarding grants to 18 districts and impacting 72 schools, resulting in an average 13% increase in breakfast participation. In a major initiative, we collaborated with Seattle Public Schools, equipping them with new milk coolers adorned with dairy messaging, enhancing the visibility and appeal of dairy.



grants awarded to:

{ 72 schools }  
{ 18 districts }

breakfast participation  
**+13%**  
on average

## University Connections

## Fellow Program



Our commitment to showcasing dairy's role in sports nutrition and refueling extends to our digital presence and in-person activations. Through our Central Washington University (CWU) Athletics fellow program, we've amplified our message across digital platforms, reaching student-athletes, coaches, and educators. Building on that success, we're expanding the program to include a second student from University of Washington (UW) as a fellow.



reached →

**300+**

student athletes, parents and coaches through HS team talks and nutrition consults

**27k+**  
impressions

**37**  
sports nutrition social posts

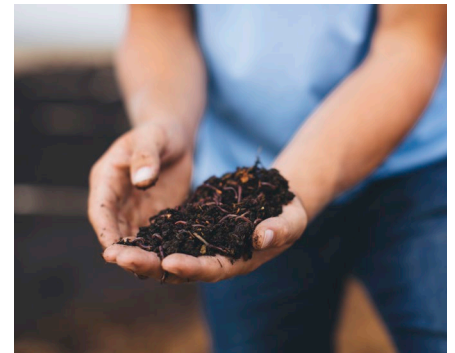


# SUSTAINABILITY

Sustainability is an issue that is increasingly top of mind for consumers and we are focused on solidifying dairy's position as an environmental solution. We recognize the critical role dairy plays in our communities and the environment, and we are committed to ensuring its long-term viability. From innovative research projects exploring the environmental benefits of dairy manure management to building a sustainability collaborative in our own backyard, we're actively shaping the future of sustainable dairy farming. Our farm tours, participation in thought leadership, and educational webinars further underscore our dedication to fostering sustainable practices and sharing knowledge within our industry.

## RESEARCH

We supported research for two projects on dairy waste management, crucial for farmers. One, led by Prof. Earl Creech at Utah State University, studied worm castings' impact on corn growth and soil health, aiding crop yield and soil quality enhancement. The other, by USDA ARS, measured methane emissions from dairy farm manure, informing strategies to reduce greenhouse gases and enhance farm sustainability. These initiatives aim to make dairy farming more sustainable, directly benefiting farmers and their practices.



## COMMUNICATION

### WA Sustainability Webinars

Three focused webinars for Washington State's dairy farmers were conducted, featuring experts like Nicole Ayache (NMPF), Austin Allred (Royal Dairy), and others. Covered topics ranged from the economic benefits of cap and trade to the technicalities of carbon offsets and innovative sustainability technologies. Recordings of all sessions were shared with participants and continue to live in a YouTube playlist accessible to farmers that fosters both environmental and economic growth in dairy farming.

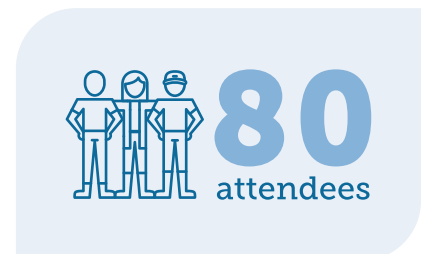


The graphic features a dark blue background. At the top left is a white outline of the state of Washington with the word "DAIRY" in a white, distressed font. To its right is a green silhouette of the state of Washington containing a white icon of a cow and a white icon of a building. Below these icons, the text "WA Sustainability Webinar Series" is written in white. Underneath, a list of three topics is shown in white: "Carbon Accounting & Carbon Markets", "Cap & Trade Program in WA", and "Environmental Footprint & Profitability". At the bottom, a light blue rounded rectangle contains the text "90+ views of recorded webinars" in dark blue.

## PARTNERSHIPS

### Pacific Northwest Partnership

Engaged with industry partners, DFW remains active in the Pacific Northwest Partnership (PNWP), dedicated to reducing the environmental impact of dairy operations in line with the industry's 2050 Net Zero Initiative. Twice-yearly meetings bring together across the dairy supply chain including farmers, processors, and customers to promote sustainability. The 2023 meetings in Tillamook and Salt Lake City featured direct discussions with key customers like Danone and Nestlé.



The graphic shows three stylized human figures in white outlines standing side-by-side. To their right is a large, light blue number "80" with the word "attendees" in a smaller, dark blue font below it. The entire graphic is set against a light blue rounded rectangle.

## WA Sustainable Dairy Collaborative

DFW, in collaboration with the WA Dairy Federation and Darigold, launched the WA Sustainable Dairy Collaborative to benefit all dairy producers in Washington. The goal is to promote the adoption of on-farm practices and technologies that reduce carbon emissions and improve sustainability, enhancing the competitiveness and viability of the industry in our state. Initial focus areas include establishing funding mechanisms, identifying, and supporting on-farm projects, educating farmers about sustainability, and showcasing achievements to consumers and customers.



# \$46.5MM

in funding secured through partnership 

State: **\$30MM**

Federal: **\$16.5MM**

## THOUGHT LEADERSHIP ENGAGEMENT

### NW Bioenergy Summit

DFW highlighted the dairy industry's critical role in global sustainability, emphasizing the principles of agricultural symbiosis and the creation of value from waste. The summit spotlighted dairy's significance reflecting its impact on environmental and social spheres.

over  $\frac{1}{3}$  of sessions featured dairy

**200** delegates

### WA-Denmark Ag Symbiosis Tour

The tour in Denmark offered insights into industrial symbiosis, demonstrating how interconnected industries can bolster the agriculture sector's value, efficiency, and resilience. This model of circular economy, which turns waste into value, aligns with DFW's efforts to enhance the WA dairy industry's performance and sustainability.



**25** WA leaders

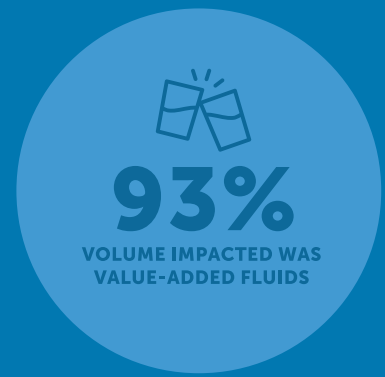
visited **12** Danish food and beverage sectors

met with **15** experts



# INNOVATION

Our Innovation strategy is the cornerstone of our approach to driving incremental sales and fostering commercialization. Through strategic partnerships, category promotions, and targeted marketing initiatives across key sales channels, we aim to amplify the impact of dairy in the marketplace. In 2023 alone, these concerted efforts contributed to significant dairy sales growth, totaling over 11.6 million lbs impacted.



## CHANNEL SALES

### Ecommerce

#### Instacart Campaigns

Our Instacart campaigns are a continued partnership with ODNF focused on promoting and driving sales for dairy products from the PNW region. In 2023, we expanded to include butter and artisan cheese promotions in addition to our fluid milk campaigns. Each campaign highlighted seasonally relevant creative throughout the year.



bring the coffee shop home  
with milk from northwest family farms

2.3MM impressions | \$5.05 ROAS

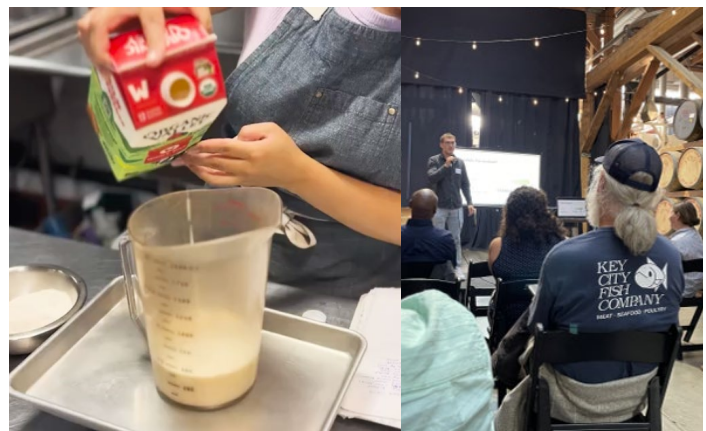
direct sales from campaign:

\$17k cheese	\$332k milk	\$143k butter
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### Foodservice

#### Seattle Restaurant Week

The Seattle Restaurant Week *Producer x Chef Networking Event* offered a platform for industry networking, featuring a curated cheese table from the Washington State Cheese Association. An in-house social media video spotlighted the use of Darigold butter and Organic Valley whole milk at Bakescapade, a small, local pop-up business. As a result, these efforts collectively generated 35 leads from Seattle-based restaurants looking to collaborate with local dairy producers and the video was reshared to Seattle Restaurant Week's social media channels.



## Home Delivery

### Eggnog Nation



In 2023, we celebrated our 10th year of the Eggnog Nation sponsorship with Smith Brothers. Teaming up with Mixologist Mark Sassi, we boosted awareness for Eggnog Nation with holiday cocktail and mocktail recipes featuring Smith Brothers eggnog. This collaboration, featured on FOX 13 morning news – Good Day Seattle, alongside Mark Coleman from Food Lifeline supported a successful promotion driving sales for Smith Brothers eggnog as well as a matched donation of milk to Food Lifeline.

**13.7k+**  
quarts of eggnog sold



**7.3k** 1/2 gallons  
of 2% milk donated



## PARTNERSHIPS



### Domestic Fluid Milk Partnership

#### Coffee Campaign

Expanding on our successful coffee campaign in 2022, our 2023 partnership with Darigold and DMI focused on expanding creative assets and innovation in the rapidly growing creamer category. Real dairy creamer stands out as the perfect complement to coffee.



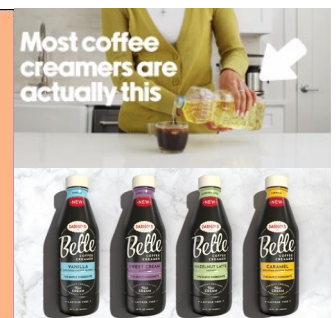
**87MM**  
impressions

**76k**  
units sold 

#### Innovation Development: Belle Coffee Creamers



Through our collaboration, Darigold successfully launched four new premium, real-dairy creamers in January 2024. These products meet consumer demands for simplicity, elevated natural flavors, and lactose-free options, showcasing Darigold's commitment to pushing the boundaries of dairy innovation.





# EXPORTS

Our focus on exports aims to establish a sustainable dairy export business by driving sales of value-added dairy products in key international markets. In 2023, we leveraged industry funding to support a Canada cheese program and drove sales opportunities for value-added fluid exports through our international partnership with Darigold and DMI.

## INDUSTRY COLLABORATION

### Canada Cheese Program

Through the Canada Cheese Program, we assisted six artisan cheesemakers from Washington in promoting their products at trade events in Western Canada, thanks to WUSATA funding. This initiative yielded incremental sales opportunities with various wholesalers and retailers in Victoria and Vancouver, B.C.



6 Washington cheesemakers featured 📺

2 trade events



## PARTNERSHIPS

### International Value-Added Fluid Milk Export Development

Year one of our international partnership was focused on accelerating customer engagement and consumer research for key markets to develop opportunities for value-added fluid export. In addition to three new bodies of consumer research, the team developed engagements with wholesale partners and successfully exported a seasonal offering of eggnog contributing to fluid sales volume in 2023.



# 2023 NATIONAL CHECKOFF HIGHLIGHTS

## REPUTATION



**Dairy Influencers Dream Team**  
**36MM+ impressions** on TikTok  
 beating the goal by 26%

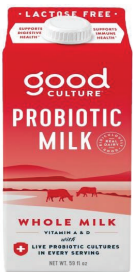


**Telling US Dairy's Story**  
**28% increase**  
 in USdairy.com web traffic  
 with nearly **5MM visitors**



**Nutrition Partners**  
 Engaged with  
**70k+ health professionals**  
 garnering **7.2MM+ impressions**  
 through the Mayo Clinic Partnership

## INNOVATION



**Partnerships**  
 Partnered with leaders in  
 Foodservice, Domestic, & Fluid Milk  
 to bring disruptive new products  
 & marketing programs

Launched **10+ new products**



**Nutrition Science**  
**150+ new claims**  
 developed for research  
 validation in 2024

## SUSTAINABILITY



**Advancing Farmer Support**  
 Launched a regional pilot program &  
 online education to enhance farm  
 advisors' capacity in aiding farmers  
 with sustainability planning & decisions

### Strengthening Research & Proof

Initiated **8 new research projects and collaborations**, including the Greener Cattle Initiative and Dairy Soil and Water Regeneration program, focusing on soil health and its impact on greenhouse gas reduction and water quality

### Building Partnerships for Environmental Progress



Secured **\$10MM+** in commitments to support environmental research & action, fostering relationships with partners to back dairy's environmental journey

## EXPORTS



**Food Service Partnership**  
 Pizza Hut Indonesia reached  
**1.7MM consumers**  
 with US cheese messaging  
 through the new incorporation of  
 USDEC "Made with US Cheese" logo

QuartzaPizza drove **8.6% increase in sales**  
 during the promotion, selling over  
**219,529 lbs of cheese in 5 weeks**

### International Enterprise Team

Formed a cross-functional team, including DMI, USDEC, and State/Regional staff to identify growth opportunities for U.S. dairy exports

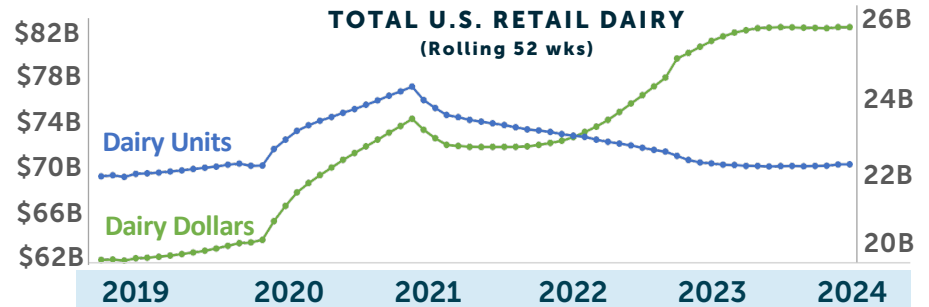
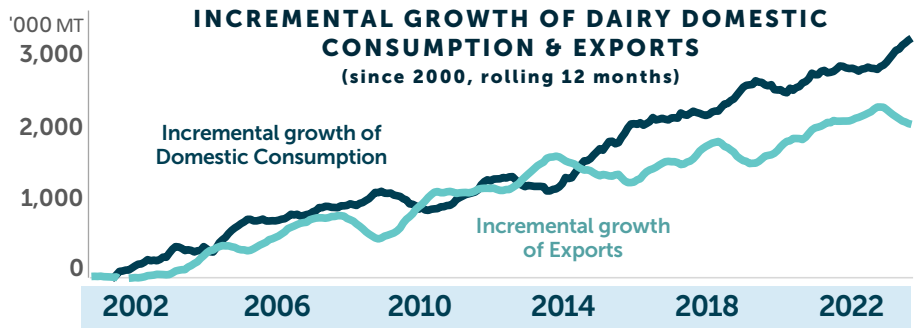


Conducted fluid milk opportunity landscape assessment to explore potential partnership or in-market pilot opportunities in 2024



# INDUSTRY OVERVIEW

U.S. consumers spent more on dairy products in 2023 but purchased slightly fewer units as inflation has held back consumer demand. This impact is calming, but still causing some softness, dairy price inflation remains higher than many other categories. On a volume basis, yogurt, butter, whipping cream, cottage cheese and crema recorded growth for the full year. Cottage cheese sales soared in 2023 driven by social media. Recipes featuring cottage cheese as an ingredient in unexpected treats/dishes went viral, pulling in younger adult consumers. Total fluid milk category volume continues to trend down driven by declines in conventional gallon sizes. The bright spot in fluid milk is the value-added segment which continues to drive growth and expand share.



## WASHINGTON FLUID DAIRY SALES

### FLUID MILK

**61.7MM Gallons**

**-3.9%**  
vs 2022



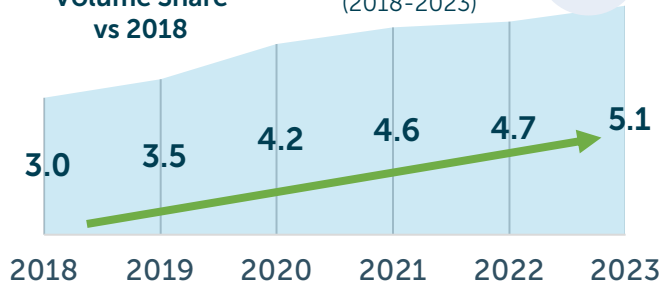
### LACTOSE-FREE & REDUCED VOL.

(Million Gallons)

**2x**  
Volume Share  
vs 2018

**5-year CAGR**  
(2018-2023)

**13.4%**  
Volume



### SUBCATEGORIES



Coffee Creamer continues to drive growth

**+8%**  
Volume

**+17%**  
Dollars



Plant Based Alternatives continue to decline

**-6.3%**  
Volume

## WASHINGTON CONSUMER STUDY

In partnership with DMI and Kantar, we issue an annual consumer survey that allows us to track consumer perception of dairy and help strategically focus our programs and messaging. Overall, consumers in Washington have similar perceptions and trust of dairy industry vs national counterparts but have increased consumption and generational variances around trust.

### Dairy Consumption is High

**44%**

Consume Milk Daily

**+8pts**

vs National

**+5pts**

vs National

**38%**

Consume Cheese Daily

**41%**

Consume Butter Daily

**+7pts**

vs National

### Consumer Trust is High in Households with Children



Millennials

Parents in Washington have higher complete trust of the dairy industry. Millennial parents are especially positive.



HH with Children  
**+10pts vs National**



Gen Z



Generation X

While consumption is high, Gen Z and Gen X have lower levels of agreement with dairy attributes including cow care and responsible production

# DAIRY FARMERS OF WASHINGTON BOARD & STAFF



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