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# **An Overview of Dairy Marketing Cooperatives Operating in New York State**



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# **AN OVERVIEW OF DAIRY MARKETING COOPERATIVES OPERATING IN NEW YORK STATE\***

by

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## Abstract

Agricultural cooperatives have historically played an important role in marketing farm products produced in New York State dating back to the 1800's. Some of the first dairy marketing cooperatives organized in the U.S. were formed in New York. Many early dairy cooperatives were created to bargain for prices and terms of trade on behalf of farmer members with dairy processors. The number of dairy processing plants and firms in the U.S. and New York State have decreased significantly over the past fifty years. However, the number of New York dairy cooperatives, especially bargaining cooperatives, did not decrease at the same rate as the rest of the U.S. over the same period.

There is a wide range of types of cooperatives operating in New York performing various functions throughout the dairy value chain. Some dairy cooperatives operate at the first handler-level of the value chain as bargaining associations, while others operate further up the value chain by adding value to member milk in a number of ways. New York dairy cooperatives utilize a variety of organizational structures including: centralized, federated, marketing agency in common, strategic alliances and joint ventures both with cooperatives or other types of firms. Cooperatives can qualify for special status within the Federal Market Order system obtaining some privileges or voting rights not available to proprietary handlers.

New York State reported the highest number (65) of dairy cooperatives of any state. The average gross volume per New York dairy cooperative as well as the average gross business volume per member was relatively low compared to other major dairy states. There are a relatively larger number of small scale bargaining cooperatives headquartered in New York State.

Proximity to market; a large number of smaller volume processing plants; the previous ability of smaller bargaining cooperatives to secure beneficial terms for their members; the lack of a strong, pre-eminent dairy cooperative in the region; past Federal Market Order provisions in New York, and major cooperative financial failures were all factors that provided a climate for small bargaining cooperatives to operate in.

Ten of the top 50 dairy cooperatives in the U.S. operate in New York. Four New York cooperatives with processing operations are among the top 100 U.S. dairy processors. A number of national, international cooperatives or associations of cooperatives include or support New York cooperatives such as the National Milk Producers Federation, Cooperatives Working Together, Dairy America, and the National Council of Farmer Cooperatives.

Dairy cooperatives operating in New York State are adjusting to significant changes in the regional, national, and global markets for milk and dairy products. Since the data were collected for this report in 2003, a number of major changes have occurred in the number and scope of New York dairy cooperatives. Those developments will be reviewed in a future report.

### Keywords

Dairy marketing cooperatives, bargaining cooperatives, federated cooperatives, New York State

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A number of government agencies provided data including: the Division of New York State Dept. of Agriculture and Markets, the Federal Market Administrator for the Northeast Milk Marketing Area, and USDA, Rural Business – Cooperative Services.

Several faculty in the Department of Applied Economics and Management at Cornell University including Dr. Andrew Novakovic and Dr. Mark Stephenson along with Will Francis, Director of the Dairy Division in the New York Department of Agriculture and Markets reviewed an earlier draft of this publication and offered useful comments. Any errors remain the sole responsibility of the author.

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### Glossary of Terms

A number of terms used in the dairy industry and in the literature on cooperatives may be unfamiliar to the reader. A glossary of terms was developed and can be found at the end of the report to assist the reader in better understanding some of the terminology used. The author acknowledges several glossaries that were used to develop the one for this report including: Cornell Program on Dairy Policy and Markets and the Center for Cooperatives at the University of Wisconsin as well as definitions obtained from the New York State Dept. of Ag. and Markets, Dairy Division.

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## I. INTRODUCTION

### Background

Agricultural cooperatives have historically played a critical role in marketing farm products produced in New York State. Over the past 100 years, cooperatives have changed strategies, adopted new organizational structures, entered into joint ventures and alliances with other cooperatives or firms as well as merged operations.

Today's global and highly competitive markets create new demands on cooperatives to adjust operations, and structures, to remain competitive. Milk and dairy products are moving greater distances across the U.S. and around the world. Increasing concentration in the dairy manufacturing and food retail industries is resulting in significantly fewer buyers of milk and New York dairy products. The remaining buyers are more demanding of producers and their cooperatives as supply chains tighten and larger volumes of milk are required.

### Dynamic Situation

New York State is home to a number of very innovative dairy cooperatives as well as a very diverse set of cooperatives. There are also a number of dairy cooperatives headquartered outside New York that a critical role in marketing milk produced in New York State.

This report describes the current operations and types of dairy marketing cooperatives operating in New York State in 2003. It should be noted that today's dynamic environment is creating rapid and sometimes dramatic change in the way dairy cooperatives are structured and what functions they perform in today's dairy value chain. Any attempt at describing the current picture can quickly become out of date. However,

in order to better understand how cooperatives are changing and what the impact of these changes might be, it is useful to present an overview of current operations and structures.

#### Justification for the Study

An initial justification for this study is to address the need for an accurate baseline of data on the operations and structures of dairy marketing cooperatives operating in New York State. Given the scale and economic impact of dairy cooperatives, it is useful for both producers and manufacturers, to have better understanding of the situation and outlook for dairy cooperatives.

The project addresses several of the research priorities of the Cornell University Agricultural Experiment Station including: maintaining key market channels for value-added products as well as increasing the efficiency and value of food manufacturing and marketing for the dairy industry. The project also addresses the U.S. Department of Agriculture, CSREES Objective 1.2, “to increase the global competitiveness of U.S. agriculture”. The cooperatives included in this study do indeed operate in a global market. Some cooperatives export products while others have developed global marketing or sourcing relationships. Dairy producers in New York State and their cooperatives experience the impact of globalization every day.

#### Research Objectives

This is the first publication in a series stemming from a research project examining dairy marketing cooperatives operating in New York State. The objectives of the overall project are to:

1. Develop an up to date, database on dairy cooperatives operating in New York State.

2. Review the current role that dairy cooperative play in the New York dairy industry.
3. Examine the organizational changes taking place as dairy cooperatives adjust to today's dynamic, global marketing environment.

### Methods

The methods used to collect data reported in this publication involved contacts with various state and federal agencies and a review of relevant trade association sources and publications. A complete list of dairy cooperatives licensed to operate in New York State in 2003 was created with the assistance of the Dairy Division of the New York State Dept. of Ag. and Markets. Data on business volume and the number of members for dairy cooperatives in the U.S. and New York were provided by the USDA, RBS-Cooperative Services. Market share data on the amount of milk receipts handled by cooperatives were collected from the office of the Federal Market Order Administrator for the Northeast Federal Order 1. Industry trade associations and publications were used to develop data comparing the rankings of cooperatives operating in New York State as well as cooperatives involved in dairy processing. Historical records and maps from the New York City Dept. of Health reporting on the location of dairy plants operating in New York that were approved to market milk in New York City were utilized.

### Historical Perspective

Dairy cooperatives have played an important role in marketing New York dairy farmer's milk for over 150 years. New York State dairy producers formed some of the first cooperatives organized in the U.S. (Abrahamsen). In 1844 dairy farmers in Orange County formed the Orange County Milk Association which was organized to represent members in bargaining for prices received for their milk from cheese processors. The

Association was short-lived, because the New York City milkshed expanded beyond the local counties into surrounding states not represented by the Association. However, it laid the ground work for the later development of other milk marketing associations such the Dairymen's League.

The Dairymen's League, formed in 1907 by New York dairy farmers, was comprised of dairy producers in both New York State as well as New Jersey. The League went on to become an influential organization in the U.S. dairy industry and continues today as Dairylea Cooperative, Inc. (Eisenstadt)

Originally formed as small, bargaining cooperatives to move member milk to local plants and markets, many early cooperatives were formed in close proximity to small dairy plants. The map in Figure 1. shows the location of milk plants that shipped milk or dairy products into New York City in the years 1917 and 1928. Many of the early dairy marketing cooperatives were organized to market member milk to these local shipping plants and beyond.

Today, most of these plants no longer operate. Transportation systems, processing technologies, and markets have changed dramatically. However a number of local cooperatives that served some of these local plants have remained and were operating in 2003.



## II. COOPERATIVES OPERATING IN NEW YORK STATE

Dairy marketing cooperatives that have members in New York State include both cooperatives headquartered in the state as well as dairy cooperatives headquartered outside of New York. Data related to New York operations are more readily available for cooperatives headquartered in state.

### Dairy Cooperatives Headquartered in New York

A total of 79 agricultural marketing cooperatives of all types, with net a volume of just over \$2 billion, were headquartered in New York in 2001, (see Table 1). Sixty-four of these organizations were dairy marketing cooperatives which generated over \$1.2 billion dollars in net volume. In New York State, 6,433 dairy farmer members marketed their milk through cooperatives in 2001.

**Table 1. New York State Agricultural Marketing Cooperative Numbers and Net Business Volume, 2001<sup>1</sup>**

	Number Headquartered in State	Net Volume (\$000)
<u>Marketing Cooperatives:</u>		
Dairy	64	1,254.0
Fruit & Vegetable	9	523.6
Other Products <sup>2</sup>	6	232.3
<b>TOTAL MARKETING</b>	<b>79</b>	<b>2,009.9</b>

Source: Farmer Cooperative Statistics, 2001. RBS Service Report 61, USDA, RBS, Washington, DC, March 2003.

<sup>1</sup> Totals may not add due to rounding.

<sup>2</sup> Includes wool, poultry, dry bean, grains, livestock, maple syrup, and miscellaneous.

### Cooperatives Headquartered Outside of New York

An additional 8 dairy cooperatives that serve New York farmers are headquartered in other states including: Vermont, Colorado, Massachusetts, Pennsylvania, Missouri, and Wisconsin. Although state level volume data are not available for cooperatives headquartered outside New York State, the total dollar volume

generated by these cooperatives exceeds that of any of the cooperatives headquartered in the state. (see Appendix A.) The volume of milk handled by the out of state cooperatives licensed to operate in New York varies greatly with some cooperatives handling very small amounts of milk.

A number of dairy cooperatives headquartered in New York State handle a significant volume of milk produced in other states in the Northeast.

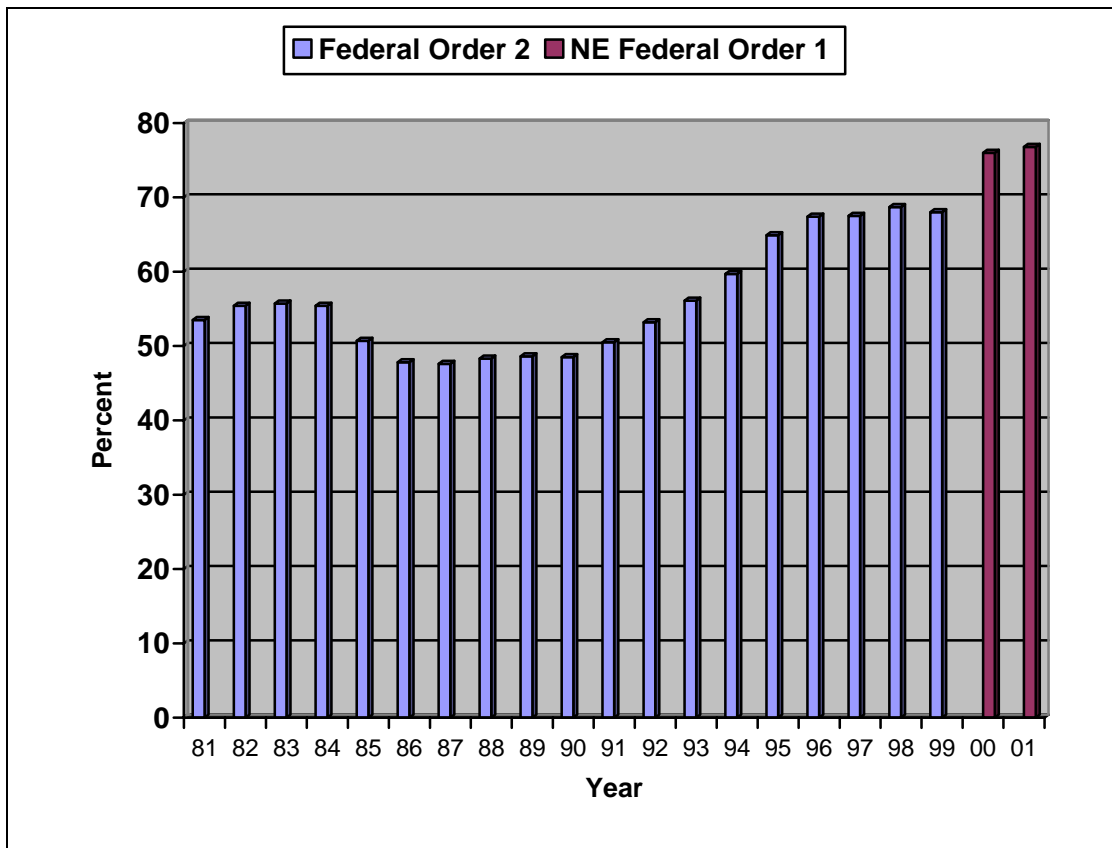
#### Cooperative Share of Producer Receipts

One gauge of the impact of dairy cooperatives in the region is the share of producer milk handled in a specific geographic area. Given that milk produced in New York State moves across the region and beyond, it is difficult to track the share of milk produced on N.Y. dairy farms that is marketed through cooperatives.

The best source of data on the market share of dairy cooperatives is the Federal Market Administrator for the Northeast Federal Market Order 1. These data report the volume and receipts for milk produced under the Federal Market Order which includes most of the milk produced in the states of New England, New York, Pennsylvania and Maryland. The share of producer receipts marketed through dairy cooperatives is presented in Figure 2.

A change in Northeast Federal Marketing Order operations occurred in the year 2000 as several Federal Orders operating in the region merged into the current Northeast Milk Marketing Order 1. The proportion of milk receipts handled by dairy cooperatives under (the old) Milk Marketing Order 2, fluctuated over a twenty-year period from 1996 to 1999 and leveled off at about 67 percent.

**Figure 2. COOPERATIVE SHARE OF PRODUCER MILK RECEIPTS  
Federal Order 2, 1981- 1999 and Northeast Federal Order 1,  
2000-2001\***



Source: Market Administrator's Office, Northeast Federal Milk Marketing Order 1.

\*The year 2001 is based on data for the first eight months of the year. Data for 2000 and 2001 represent the consolidated Federal Milk Marketing Order 1 (the result of a merger of the old Federal Orders 1, 2, and 4).

However, the cooperative share of milk receipts increased significantly to 76 percent in 2000, under the consolidated order combining former Federal Order 1 (New England), Federal Order 2 (New York-New Jersey), and Federal Order 4 (Middle Atlantic) into the new Northeast Milk Marketing Order 1. The increase in cooperative share following the consolidation of Orders was primarily the result of pre-existing higher percentages of milk being shipped to cooperatives in the former Orders 1 and 4. Those higher percentages increased the total average of milk received by cooperatives in

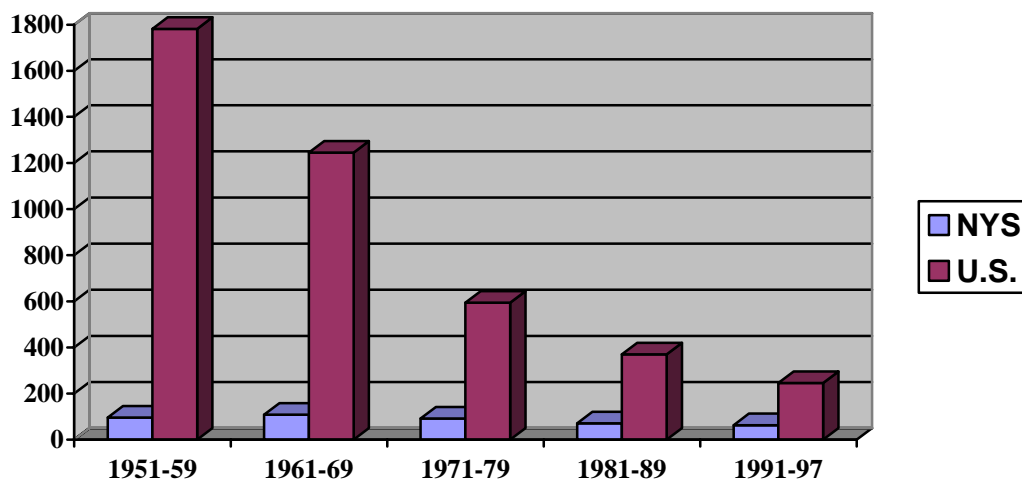


the new Order 1. The cooperative share of milk receipts for 2000 increased to over 75% from 68% in 1999 under the old Order 2.

#### New York Share of U.S. Dairy Cooperatives

New York is unique among other states with dairy marketing cooperatives in that there are a higher number of dairy cooperatives operating in the state than in any other state in the U.S. New York is also home to a very diverse set of types of dairy marketing cooperatives that operate at all levels of the dairy value chain. Dairy cooperatives operating in New York State utilize a wider variety of organizational structures than in most other states. New York also experienced a lower rate of mergers and consolidations than other states during the period 1951 to 1997 as seen in Figure 3. From 1951 to 1997,

**Figure 3. U.S. and New York Dairy Cooperatives, 1951 – 1997**



the number of dairy cooperatives in the U.S. declined from 1,800 to 221. Over that same time period, the number of dairy cooperatives in New York State declined from 96 to 64. Only 12% of the dairy cooperatives in the U.S. remain operating over this time period, while almost 67% of New York dairy cooperatives remained operating.

The number of dairy processing plants and firms decreased significantly both in the U.S. as well as New York over the past fifty years. However, the number of New York dairy cooperatives, especially bargaining cooperatives, did not decrease at the same rate as the rest of the U.S. over the same period. A number of factors allowed smaller bargaining cooperatives to operate in New York including: proximity to market; a large number of smaller volume processing plants; the ability of smaller bargaining cooperatives to secure beneficial terms for their members; the lack of a strong, pre-eminent dairy cooperative in the region during that period; past Federal Market Order provisions in New York, and major cooperative financial failures. In 2003, New York alone accounted for 64 or 32%, of all the 198 dairy cooperatives operating in the U.S.

### III. TYPES OF MARKETING FUNCTIONS

There are a number of approaches to describing the various types of cooperatives that operate in New York. Cooperatives can be categorized by functional characteristics such as: their role in the dairy value chain, services performed in marketing member milk, or by the services and/or products offered to members. Cooperatives can also be categorized by their organizational structures. This report will present both approaches to assist the reader in better understanding the roles that various types of cooperatives in New York State play in the market and how they are structured.

## Types of Marketing Cooperatives

Cooperatives perform a wide range of functions in serving members and marketing their milk. Cooperatives can operate at various levels of the dairy value chain. Some cooperatives operate at the first handler level of the value chain by bargaining for prices or terms of trade on behalf of members. Other cooperatives operate further up the value chain by adding value to member milk in various ways. The following discussion describes the various levels that cooperatives operate within the dairy value chain.

New York State is home to a very diverse set of dairy cooperatives in regard to the marketing functions performed on behalf of members throughout the dairy value chain. The majority of New York cooperatives operate at the first level of the dairy value chain and sell their member's milk to firms that operate further up the chain. A number of cooperatives operate further up the value chain or engage in significant business activities aimed at providing products and services to members.

Cooperatives serving New York producers can be grouped into the following categories, by marketing function: bargaining, bargaining and collecting, bargaining with member supplies and services, operating with member supplies and services, operating cooperatives that produce branded products, and/or engage in export activities.

## Bargaining Cooperatives

Bargaining cooperatives function at the first level of the milk value chain by acting as an agent on behalf of farmer members. Bargaining cooperatives can engage in a range of activities associated with marketing member milk such as: negotiating prices paid by processors, coordinating the collection or hauling of milk, negotiating terms of trade and scheduling delivery of milk to customers. Figure 4 describes the role of

bargaining cooperatives in marketing member milk. Some cooperatives simply operate at the first handler level and are not involved in any marketing activities beyond negotiating a price for member milk and may not be responsible for hauling milk to customer plants. Bargaining cooperatives that are responsible for collecting member milk are involved in further link in the value chain milk assembly or hauling.

**Figure 4. The Role of Bargaining Cooperatives in the Dairy Value Chain**

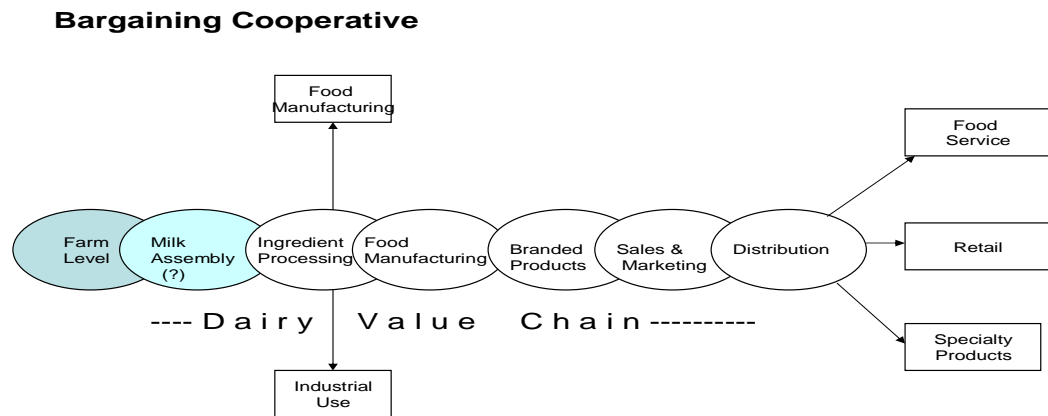
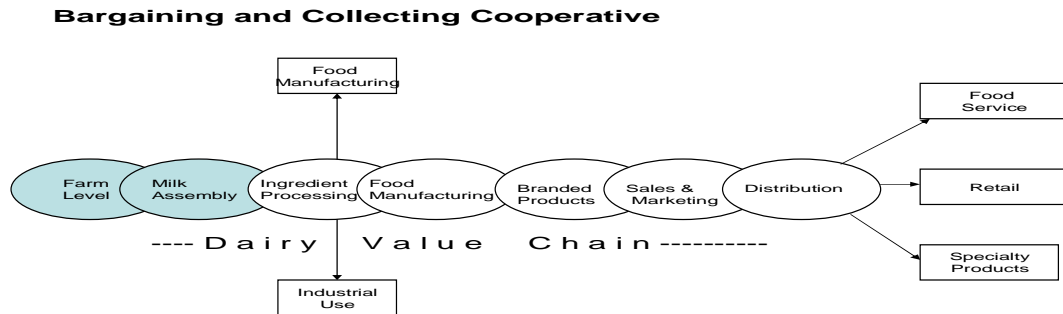


Figure 5 describes the functions of a bargaining and collecting cooperative. Along with negotiating prices and term of trade, this type of cooperative is responsible for hauling member milk to market. Some cooperatives may own or lease their own fleet of trucks to accomplish this and others enter into contractual arrangements with milk hauling firms.

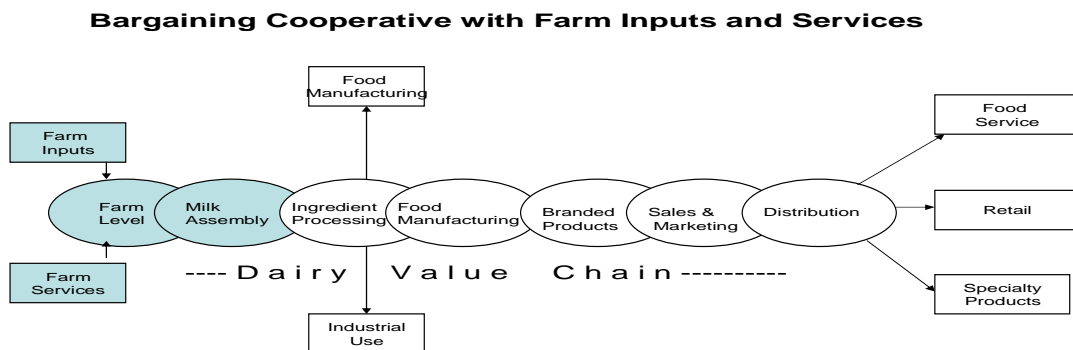
**Figure 5. The Role of Bargaining and Collecting Cooperatives in the Dairy Value Chain**



### Services and Bargaining Cooperatives

Other types bargaining cooperatives offer products and services to members. In some cases the revenues generated through these operations can account for significant income for these cooperatives. Figure 6 describes the operations of a service and supply bargaining cooperative.

**Figure 6. The Role of a Service and Input Bargaining Cooperative in the Dairy Value Chain**



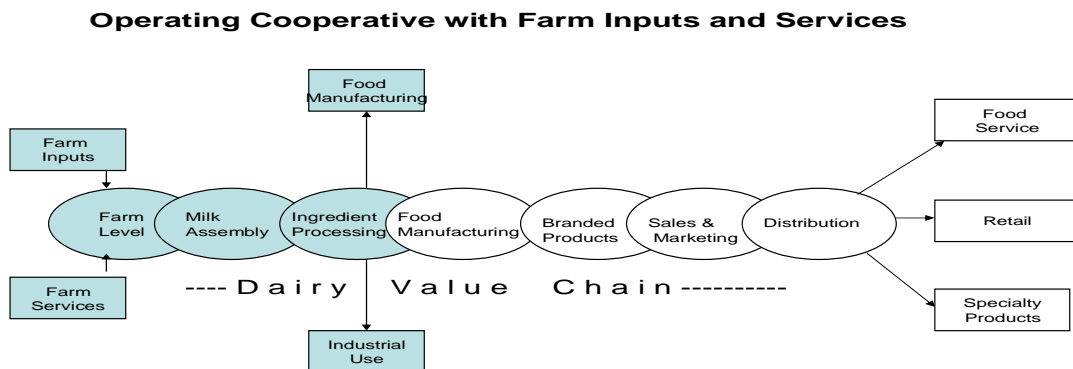
As the business volume of the service side of a cooperative grows, the marketing side of the cooperative may contribute less to total revenues. Adding value to member's milk may be of less strategic importance than developing products and service aimed at

improving member profitability. Adding new members may expand the customer base for the services side of the cooperative operations. Some bargaining-services cooperatives develop alliances or affiliations with other cooperatives to expand their market for services.

### Operating Cooperatives

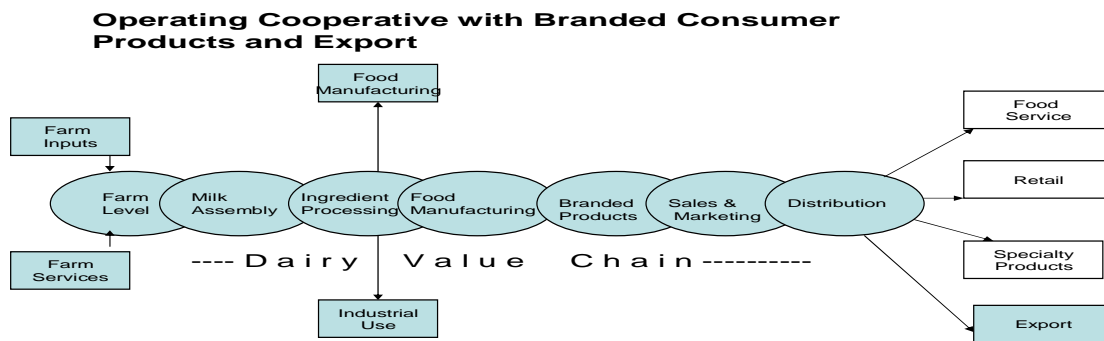
Operating cooperatives may manufacture finished, branded consumer products such as cheese, soft products or fluid milk as well as manufacture ingredients for firms that further process or market dairy products. Some operating cooperatives produce ingredients for customers that further manufacture dairy products that are ready for consumption by consumers (Figure 7). Ingredients can include a range of products such as cream, ice cream mixes, dry milk products. These operating cooperatives may also be

**Figure 7. Operating Cooperative Producing Ingredients and Offering Inputs and Services to Members**



involved in selling products, inputs, or services to members. They might be involved in not only the domestic market but also international sales. These types of cooperatives may be involved in marketing and distributing products through the entire dairy value chain, see Figure 8.

**Figure 8. Operating Cooperative Manufacturing Consumer Products with Export Sales**



### Export Cooperative Sales

Several manufacturing cooperatives that handle NY producer milk belong to Dairy America, a National dairy cooperative that exports bulk, dry milk products to customers around the world on behalf of members. Members of Dairy America include: Agri-Mark, Inc.; California Dairies; Land O'Lakes; Maryland & Virginia Milk Producers Assn.; O-AT-KA Milk Products, Inc.; and United Dairymen of Arizona. Dairy America is also involved in a joint venture with Fonterra, a New Zealand based dairy cooperative, For more information see web site listing in Appendix B.

### Balancing Milk Supply

It is in the economic interests of both producers and processing firms in a given geographic area or Market Order to have a current or daily supply of milk available to

closely meet the current demand for milk. Cooperatives often perform a “balancing” function on behalf of members and other firms in a market to help improve market conditions on behalf of farmer-members by moving surplus milk to other customers or for use in storable manufactured products.

Balancing the day to day and/or seasonal fluctuation in the supply and demand for milk typically refers to supplying the fluid processing needs of processors that may be heavy during mid-week and when schools are in session but lighter during weekends and holidays when schools are out or plants are not operating, (Novakovic et al.). Dairy farm milk production tends to vary seasonally counter cyclical to demand or daily consumption. Thus marketing cooperatives often serve the function of balancing the market by moving milk in and out of various manufacturing uses as demands of processors require and as milk supply varies or by owning and operating manufacturing plants that utilize surplus milk.

Dairy cooperatives often bear the costs associated with balancing as a service to members. Non-member farmers or firms that operate in that market could benefit as well resulting in a “free rider” problem for cooperatives. The free-rider issue, simply put, can arise when participants in a given market receive economic benefits from an effort that they do not financially support. Hence the term “free rider”. This situation has been studied by Sexton, Staatz and Vitaliano and others.



### Summary of Functional Types

There are an assortment of types of cooperatives functioning at various levels of the dairy value chain including: bargaining, bargaining-collecting, operating, manufacturing producing ingredients and/or consumer products. Member-service, dairy cooperatives can provide a wide range of services to members generating significant revenues over and above milk sales. Several processing cooperatives operating in New York have joined cooperatives formed to export dairy products and entered into joint ventures with dairy cooperatives outside the U.S.

### IV. TYPES OF ORGANIZATIONAL STRUCTURES

New York cooperatives have developed a variety of organizational structures both for internal governance purposes as well as to define relationships to other cooperatives or business entities. Cooperatives in the state utilize various organizational structures including: centralized and federated cooperative structures, marketing agencies in common, joint ventures, and affiliations. Indeed, new organizational structures are evolving to adjust to today's dynamic market. This section will describe these types of organizational structures.

#### Affiliated Cooperatives

A number of dairy cooperatives in New York have entered into an affiliated relationship. Affiliate cooperatives can be a direct member cooperative of a group or a federation of cooperatives with representation rights in the parent cooperative. Or an affiliated cooperative may have a marketing contract with another cooperative but does not have representation rights in the parent cooperative, (NYS Ag. & Mkts.). Under provisions of previous Federal Order 2, affiliated cooperatives could qualify for

“cooperative service payments” generated through the operations of the parent cooperative. Service payments were paid out of the Federal Order pool to parent cooperatives (and passed through to their affiliated cooperatives) that maintained and provided balancing services that benefited firms participating in the pool. Payments were made on a per hundred weight basis for the total volume of milk marketed.

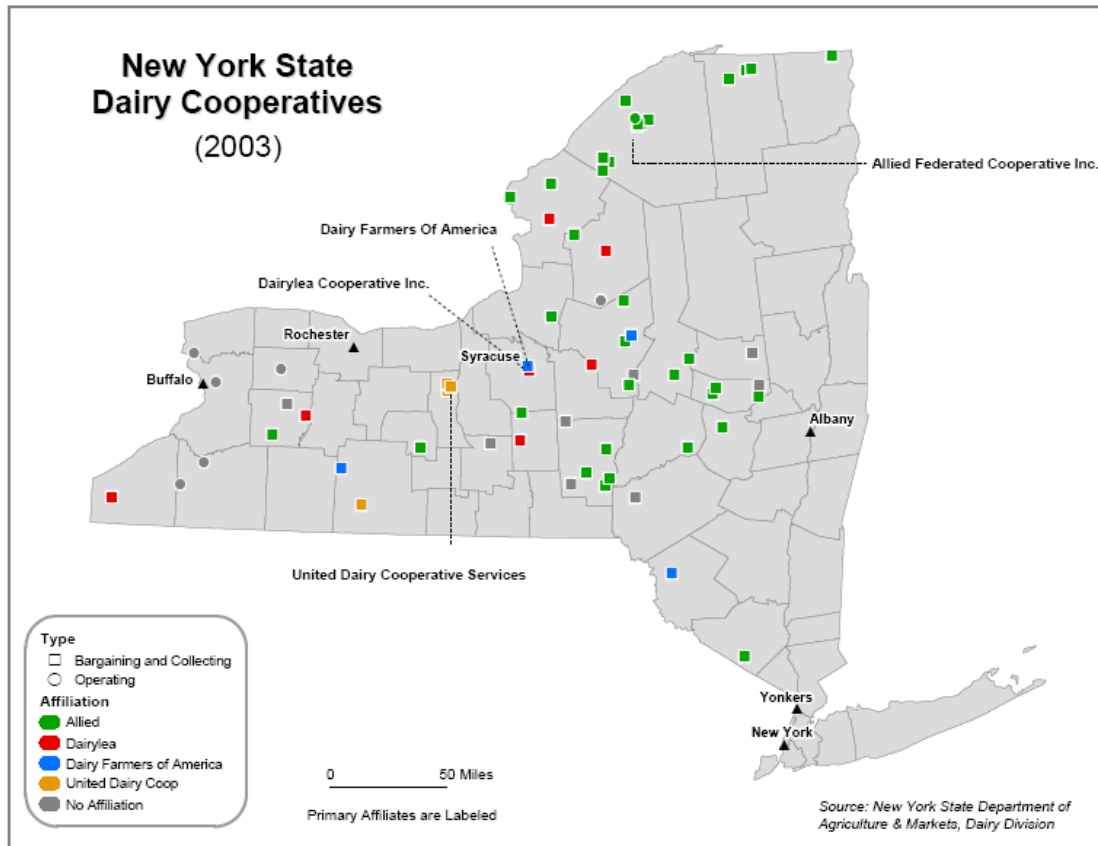
In 2003, there were a total of 65 dairy cooperatives headquartered in New York State including 45 cooperatives affiliated to four parent cooperatives, (see Table 2). Figure 9 presents the location and affiliation of cooperatives headquartered in New York State. The parent and affiliated cooperatives are color coded. Affiliating with another cooperative may allow that cooperative to be eligible for services offered by the parent cooperative. Affiliations may allow a smaller cooperative to partake in the larger parent cooperative marketing efforts, yet maintain their independent status.

**Table 2. New York Affiliated Dairy Cooperatives, 2003**

	<u>Number of Cooperatives</u>
<u>Parent Cooperatives:</u>	
Allied Federated Cooperative	33
Dairylea Cooperative	6
United Cooperative Dairy Services	3
Dairy Farmers of America	3
<b>TOTAL AFFILIATES</b>	<b>45</b>
Parent cooperatives	4
Non-affiliated cooperatives	16
<b>TOTAL COOPERATIVES</b>	<b>65</b>

Source: New York State Dept. of Ag. and Markets, Dairy Cooperative Directory, 2004

**Figure 9. Map of New York State Dairy Cooperatives with Affiliates**



The number of cooperatives that operate independently with no affiliation to other cooperatives are shown in Figure 9 as a neutral gray tone. The open spaces with no cooperatives on the top and lower right hand side of the map are mountainous areas of the Adirondacks and Catskills

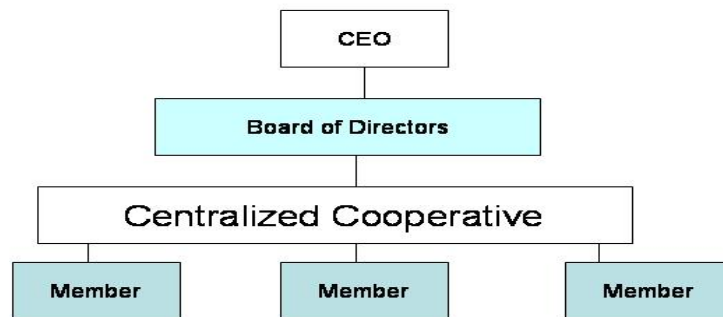
### Membership Structures

Membership structures can be broken down into two types; centralized and federated cooperatives. Each of these structures will be described and examples of New York cooperatives will be offered for each type.

### Centralized Cooperatives

A centralized cooperative is an organization in which farmer-members belong directly to the cooperative (Figure 10). The governance and management of this type of cooperative are centralized as well. An example of this type of cooperative operating in New York State would be Upstate Farms Cooperative.

**Figure 10. Organizational Structure of a Centralized Cooperative**



In centralized cooperatives, there is a direct line of management control of cooperative operations. There may be delegate bodies elected by members that would comprise an additional layer of member representation below the board of directors.

### Federated Cooperatives

Federated cooperatives are composed of local cooperatives that individual farmer-members belong to. Local cooperatives would be governed by an elected board of directors and may employ local managers. The members of a federated cooperative are not individual farmers but local cooperatives. The federated cooperative would be governed by an overall board of directors that is typically comprised of directors of local

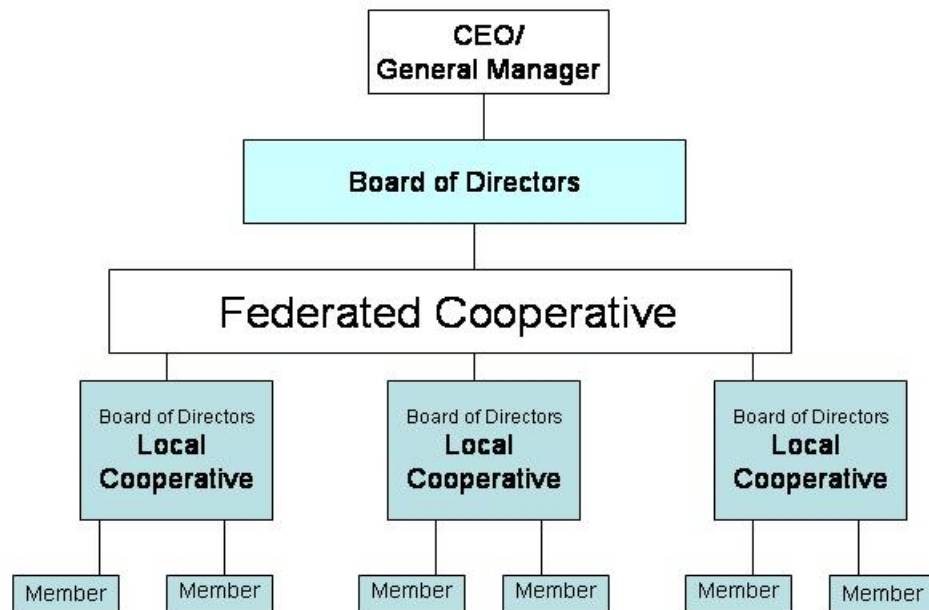
cooperatives or in some cases, local managers as well (Figure 11). Allied Federated Cooperatives was an example of a federated cooperative. It was dissolved in 2006.

### Joint Ventures

Joint ventures comprise another type of organizational arrangement utilized by New York State cooperatives. Joint ventures might involve two or more cooperatives investing in and/or operating a business venture, or the joint venture might be between cooperatives and other types of firms (Figure 12).

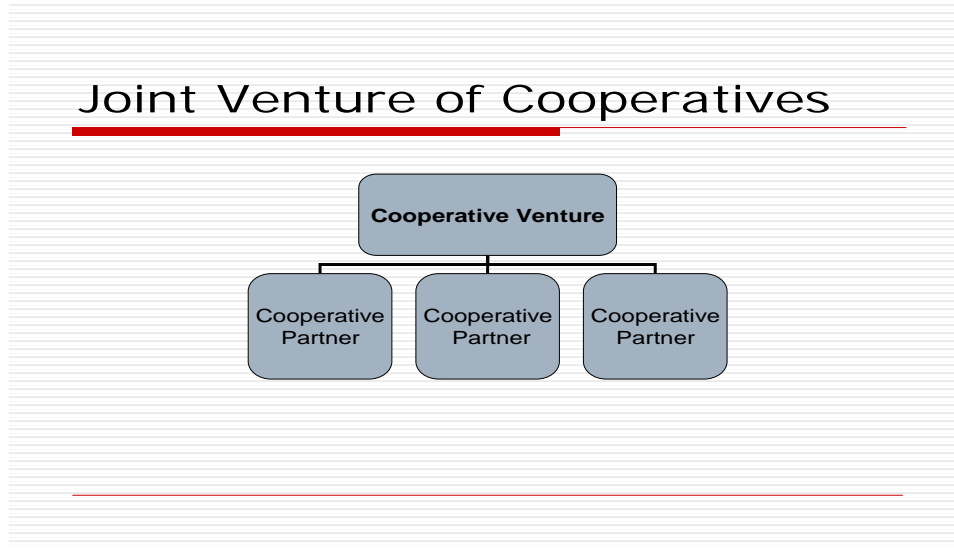
The venture may have its own governing body to provide oversight for the joint venture on behalf of the collaborating firms. An example of a long standing joint venture

**Figure 11. Organizational Structure of a Federated Cooperative**



of cooperatives would be O-AT-KA Milk Products. For more information see website listing in Appendix B.

**Figure 12. Organizational Structure of Joint Venture of Cooperatives**

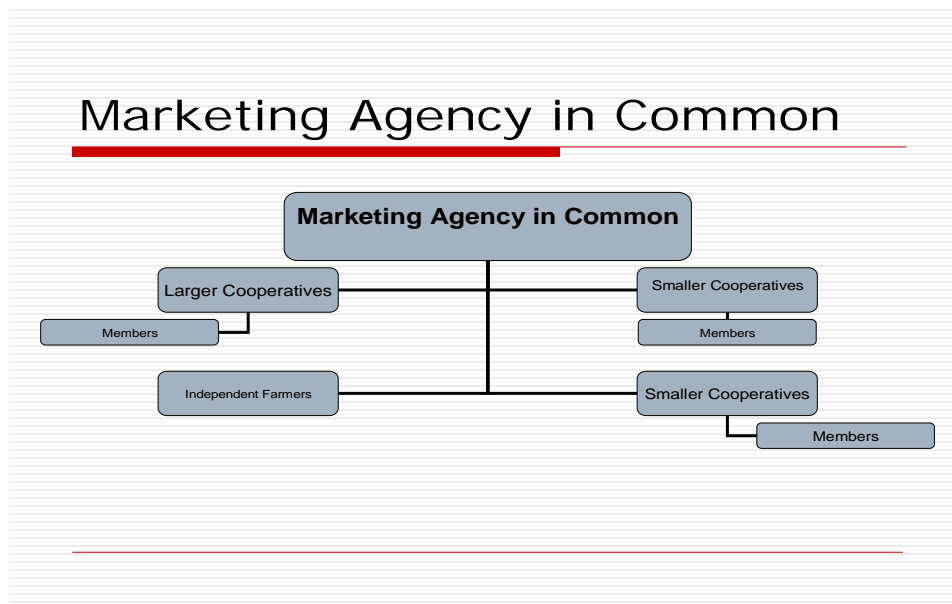


The O-AT-KA Milk Products Cooperative joint venture involves the ownership and operation of a diversified milk processing plant in Western New York.

#### Marketing Agency in Common

A marketing agency in common is an organization that acts as an agent on behalf of cooperatives and/or individual, non-member producers (Figure 13). The agency negotiates prices and terms of trade on behalf of the entities that agree to commit their milk to be marketed through the agency. The agency may or may not take title to the milk or market under a brand name. The agency provides a “common sales desk” for the entities involved. An example of a marketing agency in common would be Dairy Marketing Services, DMS. More information can be found on DMS on their web site (see Appendix B.)

**Figure 13. Organizational Structure of a Marketing Agency in Common**



### Role of Cooperatives in Market Orders

Dairy cooperatives can play a unique role compared to other types of firms within a given Market Order. Dairy cooperatives in New York State operate in both State and Federal market orders.

Federal Milk Marketing Orders regulate the movement and marketing of fluid milk marketed within the geographic area of the Order. Dairy cooperatives that qualify are entitled to a special status within an Order that results in obtaining some privileges not available to proprietary handlers (Jabcoison and Cropp). These privileges can include:

1. The ability to block vote for its members.
2. To blend or pool proceeds from the sale of member milk.
3. Collect proceeds from the sale of member milk.

4. Perform marketing services for members that are exempt from market services charged to non-members
5. Move or direct milk in a manner not permitted proprietary handlers.

In order to qualify for these privileges a cooperative must meet the following conditions:

1. It must be an association of agricultural producers.
2. It must be engaged in marketing milk.
3. It must be operated for the mutual benefit of its members.
4. Its operations must be controlled by its members.
5. The value of non-member business must be less than the value of member business.

Dairy cooperatives play a key role in shaping the operation of Market Orders in a number of ways. Cooperatives are authorized to represent the collective interests of their members through block voting on Order issues that may arise. Cooperatives have an interested party status in calling for hearings to consider changing provisions of the Order or providing testimony at such hearings. A cooperative or group of cooperatives that account for a major share of milk marketed could notify USDA that it no longer supports an Order with a vote of no confidence. Cooperatives assist in implementing provisions of various Orders such as seasonal pricing or call provisions requiring the shipment of milk to specific types of plants.

## V. POSITION AMONG U.S. DAIRY COOPERATIVES

Dairy cooperatives operate across the United States in each of the major milk producing states. This section of the report compares New York State data on dairy cooperatives with data from other selected dairy states.

### New York Compared to Other Dairy States

The number of dairy New York cooperatives, member numbers and gross business volume are compared to similar data from selected states. New York State had



the highest number of dairy cooperatives (67) of any state in the U.S. in 1999, as noted in Table 3. The New York figures of gross business volume per cooperative at \$29 million, as well as the gross business volume per member at \$298,000, are relatively low in comparison to the other selected states. It should be noted that although there were 65 dairy marketing cooperatives headquartered in New York State, only four or five dairy cooperatives accounted for a major share of total business volume. Many smaller bargaining cooperatives either affiliated with major dairy cooperatives or marketed their milk through a federated cooperative system.

Proximity to market; the previous ability of smaller bargaining cooperatives to secure beneficial terms for their members, a large number of smaller volume processing plants, the lack of a strong, pre-eminent dairy cooperative; previous Federal Market Order provisions in New York; and past cooperative failures were all factors that created a favorable economic environment for small bargaining cooperatives.

However, the relatively large number of small bargaining cooperatives in New York can create a fragmented marketing position for dairy producers, especially as the number of dairy plants and firms purchasing milk continued to decline in New York and across the U.S.

In 1999, the eight dairy cooperatives with 1,215 members generated a total of \$2.4 billion in gross business volume. The 67 dairy cooperatives in New York with 6,433 members generated a total of \$1.9 billion (see Table 3).

New York State reported 30 percent of all U.S. dairy cooperatives and seven percent of members, accounting for seven percent of the total dairy cooperative business volume (see Table 4). California reported four percent of U.S. dairy cooperatives and

one percent of all members, accounting for eight percent of total U.S. dairy cooperative volume.

Table 3. DAIRY MARKETING COOPERATIVES, MEMBERS, AND BUSINESS VOLUME FOR SELECTED STATES, 1999					
<i>State</i>	<i>Number of Dairy Cooperatives</i>	<i>Volume per Cooperative (million dollars)</i>	<i>Number of Members</i>	<i>Volume per Member (000 dollars)</i>	<i>Total Gross Business Volume (billion dollars)</i>
California	8	299	1,215	1,968	2.4
Illinois	4	389	2,609	597	1.6
Iowa	8	185	4,717	314	1.5
Minnesota	35	101	17,097	207	3.5
<b>New York</b>	<b>67</b>	<b>29</b>	<b>6,433</b>	<b>298</b>	<b>1.9</b>
Pennsylvania	19	21	2,612	160	.4
Wisconsin	30	200	25,266	238	6.0
U.S.	221	128	90,675	314	28.5

Source: Farmer Cooperative Statistics, 1999, RBS Service Report 59, USDA, RBS, Washington, DC, 2000

Table 4. SHARE OF U.S. DAIRY COOPERATIVES, MEMBERS, AND BUSINESS VOLUME FOR SELECTED STATES, 1999			
<i>State</i>	<i>% Share of Cooperatives</i>	<i>% Share of Members</i>	<i>% Share of Volume</i>
California	4	1	8
Illinois	2	3	5
Iowa	4	5	5
Minnesota	16	19	12
<b>New York</b>	<b>30</b>	<b>7</b>	<b>7</b>
Pennsylvania	9	3	1
Wisconsin	14	28	21

Source: Farmer Cooperative Statistics, 1999, RBS Service Report 59, USDA, RBS, Washington, DC, 2000

NYS compared: number, coop/member, coop/sales

## Top U.S. Dairy Cooperatives

*Hoard's Dairyman* magazine conducts an annual survey of U.S. dairy cooperatives to collect data on the volume of milk marketed and the number of members to determine the "Top 50" dairy cooperatives in the nation. Table 5 summarizes the results of the 2004 survey. There is a wide range of volume and number of members. In 2003, ten out of the top 50 U.S. dairy cooperatives operated in New York State and six out of the top fifty U.S. dairy cooperatives were headquartered in New York State. Dairy Marketing Services, DMS which is headquartered in New York State markets a significant volume of milk on behalf of a number of cooperatives headquartered both inside and outside of New York State.

**Table 5. Top 50 U.S. Dairy Cooperatives with New York Members, 2003**

<b>Name</b>	<b>Rank</b>	<b>Member Milk (Billion Lbs.)</b>	<b>Members</b>	<b>Headquarters</b>
Dairy Farmers of America	1	35.80	13,445	Kansas City, Mo.
Dairylea Cooperative Inc.	6	5.50	2,467	Syracuse, N.Y.
Agri-Mark Inc.	15	2.38	1,363	Lawrence, Mass.
Allied Federated Cooperatives	17	1.59	1,772	Canton, N.Y.
St. Albans Cooperative Creamery	24	1.12	532	St. Albans Vt.
Upstate Farmers Cooperative	27	0.98	304	Buffalo, N.Y.
Mount Joy Farmers Cooperative	32	0.53	309	Mount Joy, Pa
Niagara Milk Cooperative Inc.	35	0.47	174	Barker, N.Y.
Conesus Milk Producers Cooperative Inc.	37	0.42	110	Perry, N.Y.
Lowville Producers Dairy Cooperative Inc	41	0.27	190	Lowville, N.Y.

SOURCE: *Hoard's Dairyman*, October 2004  
Ranking N.Y. Dairy Processing Operations

A number of operating cooperatives that have New York members are ranked among the top 100 dairy processors in the United States. Table 6. lists those cooperatives, products, sales for 2004 and U.S. rankings. There is a wide range of sales for this group from \$2.3 billion to \$160 million.

**Table 6. Rankings of Operating Cooperatives with New York Members: Top 100 U.S. Dairy Processors, 2004**

<b>Rank</b>	<b>Cooperative</b>	<b>Products</b>	<b>2004 Dairy Sales (in millions)</b>
6	Dairy Farmers of America	Dairy beverages, cheese, cream, soft products, butter, dried whey, nonfat dry milk	\$2,300
27	Agri-Mark, Inc.	Butter, condensed milk, cheese, soft products, whey protein concentrate, lactoferrin, skim milk, powder and whey permeate	\$760
49	Upstate Farms Cooperative	Milk, Drinks, soft products, ice cream mixes, creams	\$260
60	O-AT-KA Milk Products	Sterile canned and bottled milk based products, butter, non-fat dry milk, nutritional beverages, milk-based distilled spirits	\$160

Source: DairyField, June 2005

## VI. NATIONAL AND INTERNATIONAL ORGANIZATIONS

Dairy cooperatives operating in New York utilize a number of U.S. and international organizations attempting to advance the economic interests of farmer members. This section describes some of those organizations.

### U.S. Associations

National organizations of dairy cooperatives have been established to perform various functions including: having an impact on the total the supply of milk in the U.S., supporting the promotion of dairy products, being engaged in government affairs, funding

new product research and development, as well as coordinating and promoting the export of U.S. dairy products. Various cooperatives that operate in New York State belong to or participate in the operations of some of these U.S. organizations.

#### Cooperatives Working Together, CWT

In 2002, a majority of cooperatives in the Northeast joined other dairy cooperatives across the U.S. in an initiative called “Cooperative Working Together”, (CWT). The goal of CWT is to create a producer driven supply management program in the U.S. to address nationwide supply and demand imbalances. Participating cooperatives agreed to initially contribute five cents per hundred weight (now ten cents/cwt) of milk handled to fund the initial efforts to increase exports of U.S. dairy products and decrease the supply of milk. For more information visit the CWT web site at <http://www.cwt.coop>.

#### National Milk Producers Federation

The National Milk Producers Federation (NMPF) provides a forum through which dairy farmers and their cooperatives formulate policy on national issues that effect milk production and marketing. For more information visit the web site at <http://www.nmpf.org>.

#### National Council of Farmer Cooperatives

The National Council of Farmer Cooperatives is a nationwide association of cooperative businesses owned and controlled by farmers. Its membership includes about 80 major farmer marketing, supply, and credit cooperatives, plus 31 state councils of cooperatives. For more information visit the web site at <http://www.ncfc.org>.

### Dairy Management Inc.<sup>TM</sup>

Dairy Management Inc.<sup>TM</sup> (DMI) is the domestic and international planning and management organization that builds demand for dairy products on behalf of America's 70,000-plus dairy producers. DMI and international, state and regional organizations manage the American Dairy Association®, the National Dairy Council® and the U.S. Dairy Export Council®.

DMI works with state and regional dairy promotion organizations to ensure the future success of dairy by integrating marketing, promotion, advertising, public relations, nutrition education, and nutrition, product and technology research programs.

DMI administers the dairy check-off program that funds programs to help increase demand for and sales of U.S. dairy products and ingredients, dairy producers get a long-term value for their investment by helping to increase consumption and build loyalty for dairy products.

### U.S. Dairy Export Council

The U.S. Dairy Export Council is a non-profit independent membership organization that represents the interests of U.S. milk producers, dairy cooperatives, proprietary processors, export traders and industry suppliers.

Created and staffed by Dairy Management Inc.<sup>TM</sup> (DMI), the farmer-funded marketing, promotion and research organization, USDEC is a comprehensive resource for U.S. dairy exporters and is uniquely positioned in that its membership includes both processors and producers.

## International Cooperatives

In today's global market there are a number of dairy cooperatives headquartered around the world that interact with New York cooperatives in a number of ways. Some of these cooperatives include: Fonterra headquartered in New Zealand, Campina headquartered in the Netherlands, Glanbia headquartered in Ireland and Kerry Group headquartered in Ireland. Some of these international cooperatives are involved in joint ventures with cooperatives that operate in New York or have subsidiaries that operate plants in New York State. More information can be obtained from the respective web sites of these organizations. (see Appendix B.)

## VII. SUMMARY

Agricultural cooperatives have historically played an important role in marketing farm products produced in New York State. Some of the first dairy marketing cooperatives organized in the U.S. were formed in New York.

Dairy marketing cooperatives play an important role in the New York State, U.S. and global dairy industry. Cooperatives operate at various levels of the dairy value chain and have developed a variety of organizational structures to compete effectively. The increasing scale and widening scope of dairy marketing cooperatives are having a greater impact on both farmer members as well as the industry at large.

There is a wide range of types of cooperatives operating in New York performing various functions throughout the dairy value chain. Some dairy cooperatives operate at the first handler-level of the value chain as bargaining associations, or others operate further up the value chain by adding value to member milk in a number of ways. New York dairy cooperatives utilize a variety of organizational structures including:

centralized, federated, marketing agency in common, strategic alliances and joint ventures both with cooperatives or other types of firms. Cooperatives can qualify for special status within the Federal Market Order system obtaining some privileges or voting rights not available to proprietary handlers. Dairy cooperatives play a unique role within the Federal Milk Market Order system.

Indeed, new organizational structures are evolving to adjust to today's dynamic market. A number of national, international cooperatives or associations of cooperatives include or support New York cooperatives such as the National Milk Producers Federation, Cooperatives Working Together, Dairy America, and the National Council of Farmer Cooperatives.

Dairy cooperatives operating in New York State are adjusting to significant changes in the regional, national, and global markets for milk and dairy products. Since the data were collected for this report in 2003, a number of major changes have occurred in the number and scope of New York dairy cooperatives. These more recent developments are beyond the scope of this report. But the database for dairy cooperatives operating in New York State in 2003 generated in this report can provide a useful benchmark for future research.



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## **Glossary of Dairy Marketing Cooperative Terms**

**Affiliation** – Is either: (1) a direct member cooperative of a group or federation of cooperatives with representation rights in the parent cooperative or (2) a cooperative which has a marketing contract with another cooperative but does not have representation rights in the parent cooperative. [NYS Ag. & Mkts.]

**Assembly** - In general usage this may refer to the procurement of raw materials or inputs by a business. In dairy markets it refers specifically to the transportation of milk to processing plants. Sometimes a distinction is made between farm milk pickup and over-the-road or long-haul assembly.

**Balancing** – Refers to the act of “balancing” the day to day and/or seasonal fluctuation in the supply and demand for milk. Typically refers to supplying the bottling needs of processors that may be heavy during mid-week and when schools are in session but lighter during weekends and holidays. At the same time farms produce milk every day that tends to vary seasonally in nature in contrast to demand. Thus marketing cooperatives often serve the function of balancing the market by moving milk in and out of manufacturing uses as demands of fluid bottlers dictate and as milk supply varies.

**Bargaining Agency** - Generally, this could refer to any bargaining cooperative; however, the term is specifically codified in New York’s Rogers-Allen Law of 1937. This law enables producer cooperatives to form producer bargaining agencies and milk dealers to form distributor bargaining agencies. The agencies thus formed are given certain specified powers relative to the establishment and operation of a New York state marketing order.

**Bargaining Cooperative** - Association of producers whose major function is to negotiate prices and provide buyers for the milk produced by members. If the association operates manufacturing or processing facilities at all, this activity is usually a minor part of the business

**Collective Bargaining** - Negotiation between employer and labor representatives regarding wages, hours and working conditions. In the dairy industry, bargaining may take place between cooperative and dealer representatives, as well as between union and plant management.

**Cooperative Federation** - An organization of separate cooperatives into an umbrella organization, where each cooperative is autonomous in most of its affairs. A cooperative of cooperatives. Cooperatives may federate to enhance price bargaining power, gain marketing efficiencies, or for political purposes

**Depooling** - A handler (cooperative or proprietary) of milk that changes the regulatory status of producers from "pool" producers to "non-pool" producers for the month. Under this status, the handler is no longer responsible to the market order pool for minimum class price obligations. It happens most often when prices for manufacturing milk are

rapidly increasing such that the manufacturing class price may be higher than the market order blend price, making it advantageous for the handler to “depool” producers rather than pay equalization into the market pool.

**Federal Milk Marketing Order (FMMO)** - A legal document which spells out the terms under which federal regulated handlers purchase milk from dairy farmers. The legal basis for federal orders is the Agricultural Marketing Agreement Act of 1937, as amended.

**Marketing Order** - Set of regulations governing the pricing of the milk for a specific marketing area. The regulations are created under the authority of the federal or state agriculture departments, or both jointly but are issued only at the request of dairy farmers. A marketing order regulates milk handlers; it does not regulate farmers. A marketing order sets minimum prices to be paid for milk and establishes rules to determine which handlers are regulated and whose milk is priced and in what way. It does not set resale prices for dairy products.

**Milkshed** - Area wherein the producers are located who supply the plants regulated under a given marketing order. The term can also apply to the milk supply of a single plant.

**Operating Cooperative** - Association of milk producers who own and operate milk manufacturing and processing facilities and market the dairy products for its members. An operating cooperative might also sell portions of its milk supply to other handlers.

**Pooling, Cooperative** - Method of calculating prices received by members of a specific cooperative. If its bylaws so permit, a cooperative may base the price it pays to members on the revenue obtained from sales less adjustments for operating expenses and reserves. As a result, the pooled price received by members of a cooperative may not necessarily correspond to the blend price announced under any given marketing order. Marketing orders do not interfere with the right of cooperatives to distribute returns to producers in accordance to membership contracts. In all other regards, cooperatives operating pool plants have the same obligations as proprietary handlers.

**Supply Management** - Variety of plans which attempt to keep milk production either nationally or in a specific market from exceeding commercial market needs. Can be used as an alternative to low prices as a way to control production in periods of surplus or as a long-term approach to pricing.

Appendix A. List of New York dairy cooperatives licensed to operate in 2003

Source: New York State Department of Ag. & Markets, Dairy Division

<b>Cooperative</b>	<b>Town</b>	<b>State</b>	<b>Operating Bargaining</b>	<b>Affiliation</b>
ALLIED FEDERATED COOPERATIVE INC.	CANTON	NY	O	PA-A
BOONVILLE FARMS COOPERATIVE INC.	BOONVILLE	NY	B/O	A
BURKE MILK PRODUCERS COOPERATIVE INC.	MALONE	NY	B/O	A
BUTTERNUT FARMS ORGANIC COOP	CANTON	NY	B/O	A
CANAJOHARIE COOP MILK PRODUCERS INC.	PALATINE BRIDGE	NY	B/O	A
CANTON PRODUCERS COOPERATIVE INC.	CANTON	NY	B/O	A
CAPE VINCENT MILK PRODUCERS COOP INC	CAPE VINCENT	NY		A
CEDARVILLE MILK PROD COOPERATIVE INC.	CASSVILLE	NY	B/O	A
CHAMPLAIN MILK PRODUCERS COOP. INC.	CHAMPLAIN	NY	B/O	A
DEER RIVER BULK COOPERATIVE INC.	COPENHAGEN	NY	B/O	A
DOWNSTATE MILK PRODUCERS COOP INC.	WARWICK	NY	B/O	A
FARMERS FRIENDLY COOPERATIVE INC	STITTVILLE	NY	B/O	A
FINGER LAKES MILK COOPERATIVE INC	DUNDEE	NY	B/O	A
GOUVERNEUR COOPERATIVE DAIRYMEN INC.	GOUVERNEUR	NY	B/O	A
LISBON PRODUCERS COOPERATIVE INC	LISBON	NY	B/O	A
LITTLE FALLS MILK PRODUCERS COOP INC.	MOHAWK	NY	B/O	A
MALONE MILK PRODUCERS COOPERATIVE INC.	BURKE	NY	B/O	A
MARBLE CITY BULK MILK COOPERATIVE INC	GOUVERNEUR	NY	B/O	A
MOHAWK HIGH PROTEIN COOPERATIVE INC.	CANAJOHARIE	NY	B/O	
MOHAWK VALLEY COOPERATIVE INC.	AMSTERDAM	NY	B/O	A
N. LAWRENCE MILK PRODUCERS COOP ASSN INC.	NORTH BAGOR	NY	B/O	A
N. NEW YORK BULK MILK PRODUCERS COOP INC.	CANTON	NY	B/O	A
PREBLE MILK COOPERATIVE ASSN. INC	PREBLE	NY	B/O	A
PRODUCERS COOPERATIVE INC	DOLGEVILLE	NY	B/O	A
QUALITY MILK PRODUCERS INC	BAINBRIDGE	NY		A
ROCKDALE PRODUCERS COOP ASSN INC.	BAINBRIDGE	NY	B/O	A
ST. LAWRENCE VALLEY BULK MILK PRODUCERS COOP INC.	GOUVERNEUR	NY	B/O	A
SCHENEVUS-ELK CREEK MILK PRODUCERS COOP INC	SCHENEVUS	NY	B/O	A
SCHOHARIE COUNTY COOPERATIVES DAIRIES INC.	COBLESKILL	NY	B/O	A
SEAWAY BULK MILK PRODUCERS COOP INC.	CANTON	NY	B	A
SOUTH NEW BERLIN MILK COOPERATIVE INC.	NORWICH	NY	B/O	A
SOUTHERN TIER INDEPENDENT MILK PRODUCERS COOP INC	OXFORD	NY	B/O	A
TUGHILL MILK PRODUCERS COOPERATIVE INC.	WILLIAMSTOWN	NY	B/O	A
UNITED NORTH COUNTRY BARGAINING COOP INC.	LAFARGEVILLE	NY	B/O	A
WESTCO MILK PRODUCERS COOPERATIVE INC.	WEST HILL	NY	B/O	A
CONESUS MILK PROD COOPERATIVE ASSN. INC	PERRY	NY	B/O	D
CORTLAND BULK MILK PRODUCERS COOPERATIVE INC.	CORTLAND	NY	B/O	D
DAIRYLEA COOPERATIVE INC.	SYRACUSE	NY	B/O	PA-D
JEFFERSON BULK MILK COOPERATIVE INC.	WATERTOWN	NY	B/O	D

LOWVILLE PRODUCERS DAIRY COOPERATIVE INC.	LOWVILLE	NY	B/O	D
ONEIDA-MADISON PRODUCERS COOPERATIVE INC.	SHERRILL	NY	B/O	D
WESTERN TIER MILK PRODUCERS COOP INC.	SHERMAN	NY	B/O	D
DAIRY FARMERS OF AMERICA, INC.	SYRACUSE	NY	B/O	PA-DFA
H P FARMERS COOPERATIVE INC.	HOLLAND PATENT	NY	B/O	DFA
KONHOKTON MILK PRODUCERS COOPERATIVE ASSN INC.	ARKPORT	NY	B/O	DFA
SULLIVAN COUNTY COOPERATIVE DAIRY ASSN INC.	JEFFERSONVILLE	NY	B/O	DFA
CONVENTRY PRODUCERS COOPERATIVE INC.	GREENE	NY	B/O	
EQUITY MILK COOPERATIVE INC.	WARSAW	NY	B/O	
GEORGETOWN SHED MILK PROD COOP INC.	DERUYTER	NY	B/O	
GLEN MILK PROD COOP INC.	MAYFIELD	NY	B/O	
INTERSTATE BULK MILK PROD COOP INC.	AMSTERDAM	NY	B	
KIRKLAND MILK PROD COOP ASS INC.	SAUQUOIT	NY	B/O	
NIAGRA MILK COOPERATIVE INC.	NIAGRA FALLS	NY	O	
O-AT-KA MILK PRODUCTS COOP INC.	BATAVIA	NY	O	
ONEIDA LEWIS MILK PRODUCERS COOP INC.	WEST LEYDEN	NY	O	
OWASCO VALLEY MILK PRODUCERS COOP INC.	GROTON	NY	B/O	
ROCK ROYAL COOPERATIVE INC.	SIDNEY CENTER	NY	B/O	
STEAMBURG MILK PRODUCERS COOP ASSOCIATION INC.	OTTO	NY	O	
UPSTATE FARMS COOPERATIVE INC.	BUFFALO	NY	O	
VALLEY VIEW CHEESE COOPERATIVE ASSOCIATION	CONEWANGO VALLEY	NY	O	
ADDISON MILK PRODUCERS COOP ASSN. INC.	JASPER	NY	B/O	UD
PROGRESSIVE DAIRYMAN'S COOP INC.	SENECA FALLS	NY	B/O	UD
SCENIC MTN MILK PRODUCERS COOPERATIVE	SENECA FALLS	NY	B/O	UD
UNITED DAIRY COOPERATIVE SERVICES INC.	SENECA FALLS	NY	B/O	PA-UD

Cooperatives Headquartered Outside of State of Licensed by New York State

Agri-Mark	Methuen, MA
CROPP - Organic Valley	LaFarge, WI
Dairy Farmers of America	Kansas City, MO
Empire-Keystone Milk Producers Coop. Inc.	Waverly, PA
Farmers Union Milk Producers Assn.	Denver, CO
Land-O-Lakes Inc.	St. Paul, MN
Middlebury Coop. Milk Prod. Assn.	Middlebury, PA
National Farmers Organization	Ames, IA
St. Albans Cooperative Creamery	St. Albans, VT

## Appendix B. Cooperative and Association Websites

<b>Cooperative</b>	<b>Web Address</b>
Agri-Mark Inc	<a href="http://www.agrimark.net">http://www.agrimark.net</a>
Dairylea	<a href="http://www.dairylea.com/default.htm">http://www.dairylea.com/default.htm</a>
Dairy Marketing Services	<a href="http://www.dairymarketingservices.com">http://www.dairymarketingservices.com</a>
Dairy Farmers of America	<a href="http://www.dfamilk.com">http://www.dfamilk.com</a>
O-AT-KA	<a href="http://www.oatkamilk.com">http://www.oatkamilk.com</a>
CROPP - Organic Valley	<a href="http://www.organicvalley.com">http://www.organicvalley.com</a>
Upstate Farms Cooperative	<a href="http://www.upstatefarms.com">http://www.upstatefarms.com</a>
Allied Federated Cooperative	<a href="http://alliedcoop.com/">http://alliedcoop.com/</a>
Jefferson Bulk Milk Cooperative Inc.	<a href="http://www.jeffersonbulkmlk.com/">http://www.jeffersonbulkmlk.com/</a>
St. Albans Cooperative Creamery	<a href="http://www.stalbanscooperative.com">www.stalbanscooperative.com</a>
National Farmers Organization	<a href="http://www.nfo.org">www.nfo.org</a>
<u>Export Cooperative:</u> Dairy America	<a href="http://www.dairyamerica.com/">http://www.dairyamerica.com/</a>
<u>International Cooperatives:</u> Fonterra Glanbia Kerry Foods Campina	<a href="http://www.fonterra.com">http://www.fonterra.com</a> <a href="http://www.glanbia.com">http://www.glanbia.com</a> <a href="http://www.kerrygroup.com">http://www.kerrygroup.com</a> <a href="http://www.campina.com">http://www.campina.com</a>
<u>Associations:</u> Nat. Milk Producers Assn. Cooperatives Working Together National Council of Farmer Cooperatives Milk Promotion	<a href="http://www.nmpf.org">http://www.nmpf.org</a> <a href="http://www.cwt.coop">http://www.cwt.coop</a> <a href="http://www.ncfc.org">http://www.ncfc.org</a> <a href="http://www.dairycheckoff.com">http://www.dairycheckoff.com</a>

## OTHER A.E.M. EXTENSION BULLETINS

EB No	Title	Fee (if applicable)	Author(s)
2007-02	Selected Economic Aspects of Water Quality Trading: A Primer and Interpretive Literature Review		Boisvert, R., Poe, G. and Y. Sado
2007-01	Smart Marketing: A Compilation of Smart Marketing Articles, January 2004 - October 2006		W. Uva
2006-20	New York Economic Handbook 2007	(\$7.00)	Extension Staff
2006-19	Lake Erie Grape Farm Cost Survey, 2001-2005		Shaffer, B. and G. White
2006-18	Dairy Farm Business Summary, New York Dairy Farm Renters, 2005	(\$16.00)	Knoblauch, W. and L. Putnam
2006-17	Farm Family Transitions	(\$15.00)	Richards, S. and G. Conneman
2006-16	Estate Planning for Farm Families	(\$15.00)	Richards, S.
2006-15	Income Tax Management and Reporting For Small Businesses and Farms: 2006 Reference Manual for Regional Schools	(\$20.00)	Cuykendall, C., Bouchard, G. and J. Bennett
2006-14	Health Care Planning for Farm Families	(\$15.00)	Richards, S. and L. Shipman
2006-13	Dairy Farm Business Summary, Central Valleys Region, 2005	(\$12.00)	Knoblauch, W., Karszes, J., Radick, C., Allhusen, G. and L. Putnam
2006-12	Dairy Farm Business Summary, Northern New York Region, 2005	(\$12.00)	Knoblauch, W., Putnam, L., Karszes, J., Murray, P., Vokey, F., Ames, M., Van Loo, W., Deming, A., Tillinghast, C. and J. Viveiros
2006-11	Fruit Farm Business Summary, Lake Ontario Region, 2005		White, G., DeMarree, A. and J. Byma
2006-10	The Organic Decision: Transitioning Toward Organic Dairy Production	(\$15.00)	Richard S. and S. Bulkley

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