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**The 33rd Annual
SOUTH WESTERN ONTARIO
DAIRY SYMPOSIUM**



THE PROGRAM

- 9:00 a.m. Exhibits Open, Registration and Coffee
- 10:15 a.m. Welcome
- 10:20 a.m. **“Cropping Tips for Dairy”**
Peter Johnson, Agronomist, RealAgriculture.com
- 10:50 a.m. **PRODUCER PANEL:**
“Our Recipe for Success . . . with Robots”
Keith Groshek, Groshek Dairy, Amherst Junction, Wisconsin
Martin Schouten, Schouten Dairy, Richmond, Ontario
- 12:00 noon Roving Hot Lunch (featuring novel and Canadian dairy products)
- 1:30 p.m. **“Strategies to Improve Efficiency”**
Dr. Jan Hulsen, Vetvice
- 2:20 p.m. **“Challenges and Opportunities for the Canadian Dairy Industry”**
Michael Barrett, CEO, Gay Lea Foods
- 3:10 p.m. **Speak Your Mind!**
Open microphone session with DFO Chair Ralph Dietrich
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- 3:30 p.m. Adjournment
- 4:00 p.m. Exhibits Close

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CROPPING TIPS FOR DAIRY

Peter Johnson
Agronomist, Real Agriculture

There are more opportunities for dairy producers to increase profits by managing crops better than there are for cash crop producers! However, as dairy producers make their money from the barn and not so much from the field, these opportunities are not always considered. With manure and a good rotation, it is easy to forge ahead and ignore field management: but doing so leaves a great deal of profit behind.

Manure - The value of manure cannot be denied. However, for manure value to be utilized, it must be spread evenly. Despite what growers tell me, manure applications remain extremely variable. Anything growers can do to improve application uniformity will have huge positive benefits.

Manure applications significantly increase alfalfa yield and quality. Timing is critical. Alfalfa must be harvested rapidly, and manure applied immediately. The window from cutting to damage is only 4 to 5 days.

Corn Nitrogen - Manure can be a significant contributor towards meeting the nitrogen (N) needs of corn. However, manure in general, and dairy manure in particular, is not consistent in the amount of N that becomes available for corn. With the late season N application equipment now available, there are tremendous opportunities for dairy farmers to evaluate additional nitrogen needs and apply later in the season. This could easily result in savings of \$60.00/acre. While Greenseeker, drones and Yield360 all are options, the 36 ppm nitrate test threshold may well be the most promising technique. Initial N applications of about 100 lbsN/ac are made. A soil nitrate test is taken at about the 6 leaf stage of corn. If the soil test is over 36 ppm nitrate, no further N is required. If the soil nitrate test falls between 26 and 36 ppm, an additional 50N is required. Below 26 ppm, an additional 100N is needed. This evaluates manure N release for that particular growing season and targets N applications much more accurately. Crop consultants can easily provide this service if the dairy farmer does not have the time themselves.

Sulphur - Atmospheric deposition of sulphur (S) has dropped drastically over the last 25 years, from 30 pounds/acre/year to only 10 pounds/acre/year currently, and still dropping. This has resulted in sulphur once again becoming a nutrient that is deficient in many cropping situations. It is not a question of “if” S deficiency will become a problem, but a question of when.

A 4 tonne crop of alfalfa, or a 25 t crop of corn silage, both remove up to 25 lbs S/ac. Dairy manure supplies 2.5 to 5 lbs S/1000 gallons. An annual application of 5000 gal/ac dairy manure, added to current atmospheric S deposition, should supply sufficient S. However, significant S response has been seen in alfalfa on some progressive dairy farms. Growers need to monitor S levels in alfalfa: 0.25% in the top 6” at early flower is considered the critical value. There is indication that high potash applications may increase S deficiencies, and reduce rather than increase yield. While this research is not conclusive, it is worth noting. When stand longevity is poor, or where growth is inconsistent across the field, sulphur deficiency should be considered as a potential cause.

Potassium - The incidence of low potash soil tests on dairy farms has increased dramatically over the past 10 years. Forage crops remove huge amounts of potassium. Alfalfa removes 60 lbs

K₂O/tonne, corn silage ~8 lbs/t. Dairy manure supplies 25 lbs K₂O/1000 gallons. A 5 t/ac alfalfa crop needs 12,000 gal of manure to replace the K removed, 25 t corn silage requires 8000 gal. Unfertilized, these crops could reduce soil test K by 12 ppm every year. A three year alfalfa crop could (theoretically) take a soil test K from 120 (medium) to 84 (deficient).

Recent research has shown the value of maintaining base fertility levels, with 10 more bushels of both soybean and wheat when soil fertility levels are in the medium range. While this research does not include alfalfa or corn silage, it is likely that base soil fertility levels are even more important with alfalfa. Growers need to monitor potash soil tests closely, and apply to maintain base fertility of at least 120 ppm, and up to 150 ppm, for potash.

New technologies - New alfalfa varieties with novel traits will be coming onto the market in 2016. Roundup Ready stacked with the low lignin trait is definitely something growers should consider. While yield potential of the first varieties with new traits is always suspect, this new alfalfa offers some real benefits. The RR trait allows seeding after winter wheat: glyphosate can then be used to control both volunteer wheat and other weeds. This greatly improves the success rate of establishing summer seedings, which in turn means full production the next year. The low lignin trait allows harvest at a much later stage of maturity without compromising quality: full yield can be achieved with only 3 cuts, resulting in lower harvesting costs and increased stand longevity.

Leafhopper Resistance - Growers in traditional leafhopper zones **MUST** grow leafhopper resistant alfalfa. Stand longevity, yield and quality increase dramatically. Do not forget to scout stands in the year of establishment: full leafhopper resistance does not develop until the second production year. Control may be necessary in the year of establishment.

Forage Production after Cereals/Corn Silage - Research over the last 4 years shows that 2 t/ac forage dry matter is possible with cereal forage after winter wheat or corn silage. Net profitability in these trials is over \$100/acre. This represents another opportunity for dairy producers. However, potash removal must be considered if this is considered.

Brown Midrib or Leafy Corn Hybrids - Vast yield improvements have been made in silage hybrids with higher digestibility, particularly with brown midrib. However, logistics of feeding BMR corn remains a concern, and yields, while much improved, rarely will compete economically with conventional corn hybrids.

Crop Rotation - Dairy farmers have huge potential to benefit from crop rotation. Where agreements can be developed with cash crop producers, edible beans should be a common practice on dairy farms. There is huge opportunity that can benefit both sides of this arrangement. A first cut of hay could be taken, followed by the edible bean crop being grown. Alternatively, winter wheat could be sown on time, with high yield potential and more straw harvested, following an early planted edible bean crop. It is unfortunate more producers do not take advantage of this opportunity.

Summary - The potential for dairy producers to benefit from cropping options is tremendous. It is only time, and the dairy producers willingness (or lack thereof) to try new things and work with cash crop neighbours, that limits their added income from innovative cropping practices.



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Keith Groshek

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- Bought last group of cattle in 1965.
- Milked 130 cows in 85 stall stanchion until June 2014.

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CROPPING

- Irrigation
- Timely cutting/processing
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 - Inclement weather, ventilation tubes

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- Calves get milk replacer at 103 degrees.
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PRODUCER PANEL:

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Simplicity Creates Efficiency At Schouten Dairy Farms

Martin Schouten

Our farm was originally purchased in 1955 by my grandfather. At the time he was milking 16 cows and owned 100 acres. Today I farm in a four-way partnership with my dad, Arnold, and brothers, Michael and David. We are currently milking 420 cows and crop 1700 acres. Our goal is to produce milk efficiently and simply. From the rations to feed tables, repro protocols to employee management, everything is simplified.

Nutrition

On our dairy we have a different philosophy when it comes to feeding our cows. We do not grow any haylage. Our ration is made up of corn silage, canola meal, urea, straw, mineral, and robot grain. The diet is 66% forage. Not growing hay keeps the summers more flexible for family time and also allows us to grow more feed per acre. We grow 2/3 BMR corn silage and 1/3 conventional. We use BMR so that the highest quality forages can be grown. Our purchased feed costs are higher than some farms, however, total feed costs tend to be below average when true values are placed on home grown feeds. We try to feed for efficient production and not necessarily the highest. This means lower feed costs per liter of milk produced. The milking cows are fed a one group PMR plus one robot feed. All dry cows consume the same low energy high straw TMR from dry off to freshening. Feeding a high corn silage diet along with one group TMR helps to keep the feed harvesting, storage and delivery simple.

Cow Comfort

Transition cows are of the utmost importance. They are housed on a bedded pack 3 weeks pre- and post-freshening. Lame cows are also put on the pack if the issue cannot be solved by trimming and blocking. The pack allows the most awkward cows to rise and lie easily and they do not have to fit into a stall. Once the cows have transitioned they move into 1 of 4 groups with 120 waterbed freestalls, bedded liberally with manure solids. These beds are maintained twice daily. The cows stay in that group until they are ready to be dried off again. We believe it is best to minimize pen moves whenever possible.

Repro and Genetics

When it comes to reproduction, again, we think simple is best. Our voluntary waiting period is 55 days. Pedometers are used as a first detection method, but if a cow hasn't shown estrous by 70 days she is enrolled on simple Ovsynch 56. Likewise, if a cow is open at pregnancy check, she is enrolled. We run a 29% pregnancy rate.

The insemination program focuses on using the top “Robot Ready” bulls. Milk speed and milk ability have become major criteria when selecting bulls. However, we still select bulls that are positive for kilograms of fat and protein. In the heifer barn, sexed semen is used for first service

to try and create more heifer calves from the highest genetics in the herd. It also allows for better calving ease. Beef semen is used on older cows and cows that do not meet performance standards.

Business and Employee Management

Our dad looks after land improvement and running our excavator, I am the herd manager, Michael oversees the crops and feed, and David is the lead with the calves and young stock. Each of us has our area of expertise and will make day to day decisions in that area without consultation with the others. However, we all work together when discussing and coming to bigger decisions that affect the business.

We employ 3.5 full-time employees. We hold weekly meetings and have written protocols for most tasks to ensure that everyone is on the same page and understands what is expected of them while performing each task. Every job on the farm is done in-house with this labour force. All hoof trimming, inseminations, planting, spraying, combining, forage harvesting, manure application and most on-farm maintenance is done by us and our team.

Robots

The addition of the milking robots on our farm has been a success. Since implementation, we've seen increases in milk production and improved labour efficiency. Striving for high production in a robot facility is no different than a parlour system. Focusing on transition and reproduction will make any farm more profitable. Quality feeds must be harvested and lame cows must be minimized. Our goal when the facility was built was to manage similar to the parlour barn. This meant utilizing sort pens for cows that need attention from the herdsman and allowing the less skilled labour to fetch cows, maintain the freestalls and do routine robot maintenance. Cows who are sorted have access to feed, water and milking so that I can deal with them on my schedule. The greatest benefit to robotic milking is that every cow is able to be fed specifically to reach her genetic potential. It has also saved us the equivalent of 2 full-time employees.

While the milking robots have been a worthwhile investment, not all technological improvements have panned out. We installed a robotic calf feeder in 2012, but received subpar results. Pneumonia was a major issue despite installing positive pressure ventilation. We tried everything from different group sizes and ages, to all in all out, but nothing was satisfactory. This summer we shut the robot down and began mob feeding in the same pens. We saw immediate improvement and the pneumonia has been all but eliminated. The only drawback with the mob feeders has been inconsistent growth and difficulty managing individual intakes. We have since purchased individual pens and now monitor birth weights and weaning weights to ensure all calves are exceeding the goal of double birth weight at 60 day weaning. We have had death losses of less than 1% and morbidity of less than 5% in the last 6 months.

Future Goals

We will continue to buy quota to fill the current facility and would like to build a barn for far-off dry cows and heifers. Alternative expansion opportunities will likely come in the form of land and possibly diversification into other aspects of the agricultural industry.

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STRATEGIES TO IMPROVE EFFICIENCY

Jan Hulsen
Vetvice

Current Developments in the Dutch Dairy Sector

In 2015 there were 18,300 dairy farms in the Netherlands, with on average 89 dairy cows. All together they produced 12.6 billion kg of milk with 4,41% fat and 3,47% protein. This is 1 billion kg of milk more than in 2010, and 1,500 dairy farms less.

The official forecasts for the long term milk price until 2024 (KWIN 2014-2015) is € 34.50 per 100 kg milk with 4,40% fat, 3,50% protein (About \$ 55.50 per hectolitre in Canadian currency). (This is excluding bonuses and dividends from co-ops, etc.) Business plans and investment plans use this figure as their standard. The “critical breakeven price” is estimated to be € 39.00 per 100 kg (LEI 2015, PPP Agro 2014), with wide variation between individual farms and farms of different sizes. Alfa Accountants recently reported € 37.00 per 100 kg for a reference group of 200 farms.

At this moment (January 2016), the guaranteed milk price of FrieslandCampina is € 29.25. It is forecasted that milk price will stay fairly stable and increase mildly in the second half of 2016 (Rabobank 2015). (Canadian equivalent would be \$47.00 per hectolitre)

FrieslandCampina is the biggest dairy co-operative in the world, located in the Netherlands where it handles the milk of more than 50% of the dairy farms. For 2014 it claims that the members received a value of €45.05 per 100 kg milk, in cash and in obligations.

On April 1 2015 the EU stopped the milk quota, so in theory every dairy farm could produce as much milk as it could sell. It was anticipated that Dutch milk production would increase by ~20%, half coming from an increase in milk production per cow and half coming from an increase in number of dairy cows. The general opinion was that some regulation would limit or control this growth: phosphate/mineral quota, animal quota or having to have a certain amount of land for every milking cow (CLM 2013). In 2015 Friesland Campina processed 6.45 more milk than in 2014. In the last few months of the year shipments increased so much that processing capacity was exceeded. Now farmers who ship no more than they did in the last two weeks of December get a 2 cent/litre premium.

Financial experts are saying that first of all dairy farms have to learn to handle volatility of the milk price, by having low costs, good technical results and enough financial buffer (savings) to bridge 1 year with a milk price that is 5-7 euro cents below the long term forecast.

Investments in expansion of barns and production facilities, including milk quota, land, etc., has increased the debt of many dairy farms to the point where some have more than €10,000 per cow or € 1 per kg annual production of debt. Banks are limiting credit and debts with suppliers are increasing.

Dutch dairy farms are having a low cash flow at this moment because of the low milk price. It is expected that farms with little or no financial buffer and a high debt will run into serious problems. Some of these are farms that have recently invested in a larger barn and other facilities, but are milking only part of the anticipated number of cows.

The biggest issue is how the national government will regulate the phosphate production of the dairy sector, and more specifically: how this will interfere with strategies for expansion of individual farms. EU legislation limits phosphate production but due to an increased number

of dairy cows, the Dutch dairy industry has exceeded this threshold. The Dutch government has announced that it will install a system with phosphate quota per farm, with 2014 as year of reference.

Antimicrobial resistance and reduction of use of antibiotics on farms

Increasing antimicrobial resistance of pathogenic bacteria in hospitals is big issue in the Netherlands. Extensive use of antibiotics in livestock is one of the causative factors for this. Together with an increasing critical position of the public towards livestock industry, this was the reason for developing and implementing a policy to reduce the use of antibiotics in the livestock industry by 70% (official target), with 2009 as reference year.

Even though use of antibiotics was low Dutch dairy farmers have made serious investments in reducing the use of antibiotics. Certain types of antibiotics are almost completely eliminated from livestock use. These “restricted types”, tend to be products such as fluoroquinolones and 3th and 4th generation cephalosporins, that are used in human medicine to treat bacterial infections that are resistant to other antibiotics. Dutch dairy farmers are working with a “farm specific veterinary practitioner”, with whom they make a contract for at least one year ahead. Almost always this is their normal private practitioner.

Together with the vet they make an annual *Farm animal health report and plan*. This report lists the health status and use of antibiotics, plus the areas where the farmer wants to improve, and it includes a specific action plan. The vet supplies each farm with a *Farm Treatment Plan*. This plan describes the treatments for all relevant health issues on a specific farm. It is also the reference for the antibiotics that the farmer can use and that he can have in storage. Total use of antibiotics is monitored on every farm with livestock, and calculated to a representative figure: Daily Day Dosages Animal (DDDA). These figures are benchmarked for individual farms and for veterinarians. When a farm or a vet has a high number of DDDAs, they have to report to the National Animal Health Medicines Authority and come up with an improvement plan (sDA; stichting Diergeneesmiddelen Autoriteit).

Cows in pasture

Giving cows access to pasture is an issue in the Netherlands, for three reasons:

1. animal welfare organisations advocate it is necessary for animal welfare;
2. dairy products are more and more marketed as “natural” and “healthy”;
3. the traditional Dutch landscape has cows in pasture, during the season.

Dairy processors have “grass milk” product lines, in which the farmers get a premium on top of the milk price for grazing their cows. FrieslandCampina pays a premium of €0.01 per kg milk to herds that graze more than 720 hours per year spread over 120 days or more, with a maximum of 10 cows per hectare (4 per acre) and starting before June 15th., or €0.0046 if 25% of the herd meets these criteria.

Strategies to Improve Efficiency with Lean Management

The concept “Lean” and closely related concepts such as “Six Sigma”, are essentially tools to increase output efficiency. The most essential aspect is that you establish a mind set in which you are always looking for improvements and improving. In this you do not do anything you do not need to do, and you make working processes very clear and simple. Everything you do not need to do or need to have, is considered “waste” or “muda”.

Some examples:

- If you don't measure it you can't manage it, so measure continuously and strive for improvement in heifer growth rates, feed efficiency, feed losses during harvest and storage etc.
- quality control after a product is finished is not necessary when you deliver good work including quality control during the production process. A short calving interval is information that you already know when you have your transition and breeding management monitored and well managed. Focus on that. The same goes for weight and age of heifers at first calving, (focus on monitoring growth). Measuring outcomes means you are too late, measure performance and progress instead and you will be able to respond to changes quickly.
- data is essential to be effective, but too much data is waste. So don't collect data that you do not need. Do you need to type classify cows for sire selection? Do you need to measure colostrum quality when you feed fresh colostrum? If yes, always or under what circumstances?
- straight lines through the barn with no obstacles, so you make tasks like feeding and dressing stalls easy and efficient.
- make simple and efficient tasks: do not combine milking with other chores like cow pushing and feeding. Switching from one chore to the other takes a lot of time, and doing two different things more or less at the same time reduces the quality of both chores.
- Managing time is a particularly weak area on many farms. Parkinson's law says that work expands to fill the available time. So work at eliminating waste of time activities and make sure the right tools are in the right place to do the job with minimal walking and backtracking etc.
- Instil the same attitude in employees, and set up protocols and structures that reward getting done early with training and skills development to discover and use unused talents. Never punish efficiency with fewer hours and less pay.
- think ahead and manage ahead. Cow comfort is essential for milk production and longevity. Sand bedding provides good comfort and can be managed relatively simple.
- You need to clean individual housing for young calves, when you do it the same day as the calf leaves the housing, the effect on reduction of infection pressure is the highest, so you will have less calf health problems.
- clean and structured storage. Feed storage, material storage, drug storage, machine storage, tools storage. Cleaning up loose silage before it spoils takes the same amount of time as doing it the next day, but it has a more valuable result. Is your workshop an open, organized space?
- check flows when you construct working places including cow barns: cow flow, manure flow, feed flow, people (work) flow, materials flow, information flow.

Lean needs clear targets, a clear organisation, direct feedback and real actions. Often this is called "good leadership" and "management by example".

People that are not very conceptual will easily call Lean "common sense". They have a good point, but a better name would be: "structured common sense".

First thing is that you know that there is a very strong and effective concept called Lean, that provides foot holds, approaches and insights that have proven to increase efficiency and product quality. So you open your mind for continuously improving. And the second thing is:

use the structures. No doubt in your environment there are lists, checks, tools and people that can help you in becoming more lean.

Lean originates from production industries. It started in Japan, where Toyota is the most famous example of a company implementing Lean management and Lean thinking. When North American automobile factories in the 1970's and 1980's were producing cars as they were always producing cars, Toyota was constantly re-thinking and improving their complete production lines including the logistics of supplies. Toyota ended up being the World's biggest automobile maker, and in the meantime it has built an immensely strong reputation for quality of their automobiles.



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todd.pemberton@td.com



Rob Musselman
Account Manager
Oxford, Waterloo and East Perth
226-921-4629
rob.musselman@td.com



Ed Fabian
Relationship Manager
Brant and South Waterloo
519-755-7900
edward.fabian@td.com



CHALLENGES AND OPPORTUNITIES FOR THE CANADIAN DAIRY INDUSTRY

Michael Barrett

CEO

Gay Lea Foods Co-operative

(NOTE - Michael Barrett has not provided a written summary of his presentation.)

The information below is summarized from Dairy Farmers of Ontario CEO Peter Gould's presentation to the "50th" Annual General Meeting on January 13, 2016. It is intended to provide background information on the ingredient strategy, and other marketing and trade issues.

Let me begin by saying 2015 was a great year, full of events, full of developments, full of challenges. One of my conclusions is that we could be at one of the best times in the history of the dairy industry in Canada. That is saying a lot! But before getting too excited, the future, including the immediate future, is not without challenges, big challenges. There are many times, many situations when we don't always make the best decision ... but we can get by and sometimes quite nicely with the second or even third best decision. For some of the issues we are facing, we either get it "right" or I'm afraid we'll have more trouble than we'll know how to handle.

For those of you who recall, the theme of my presentation two years ago was "when you come to the fork in the road, take it." Normally, the big issue in the Canadian dairy industry is **just making a decision**. The system is so well constructed that "doing nothing is the problem" and making a decision is the solution.

In retrospect, I could not have been more wrong! "Doing nothing" is still the problem. However, with the types of challenges the industry is facing, if we don't get it "right" ... well frankly I don't like thinking about the consequences.

The dairy industry in Ontario and Canada is facing unprecedented challenges and we'd better get it right. These include: plant capacity; the need for new investment in processing infrastructure; ingredient pricing; and meeting consumer demand for butterfat and butter.

We are not at the fork in the road, we are at a crossroad and the direction we take **will make all the difference!**

1. SPRING MILK

2015 was a good year ... quota increases; a 7% increase in milk quota, the conversion of non-saleable to saleable. The quota increases reflected a general increase in the demand for butterfat led by growth in demand for butter and fluid creams, in particular.

All that led to the unpleasant discovery in late April, or early May, last spring, that we didn't have enough processing capacity to handle the milk that was being produced on farms ... that didn't mean fluid plants or yogurt plants couldn't handle more milk and possibly some cheese plants ... or that we couldn't produce more butter. The limiting factor was drying capacity, the ability to convert skim milk into skim milk powder. This was not just an Ontario situation ... it was national ... the same situation across Canada.

Having too much milk isn't unusual, it happens every year between Christmas and New Year for about two weeks, then it goes back to normal. Well in the spring of 2015, the abnormal becomes normal. So what is always a difficult two-week period at Christmas became a three-month event ... trying to find a home for milk, to keep trucks moving, able to get back to pick up the next day's milk, helping / working together with other provinces.

... but we needed the butterfat! Demand for butterfat was and continues to grow. **Our collective ability to service the market is limited.**

Another thing we learned was that the dryers, virtually all the skim milk powder dryers in Canada, not just Ontario but the entire country ... there are two exceptions are **rapidly approaching the end of their useful life**. What does that mean ... it means the next step is not refurbishment, it is "decommissioning".

There are several realities:

- the loss of any one dryer will be a huge issue ... for the whole country – regardless of where it is located. Dryer capacity ranges from 50 million to 200 million litres. If a dryer is decommissioned, it means no home for that volume of skim milk, skim milk disposal or quota reductions for an indefinite period.
- it takes, in practical terms, three years from the day a decision is made to milk being delivered to a new ingredient facility
- it is **totally irrational to replace existing capacity with equivalent capacity!**
- new ingredient plants have to be able to meet both current and future growth for at least the next 15 to 20 years
- they need to have the technology to make the products the market demands

Each day that delays these decisions from being made increases the risk ... but delay seems to be an industry characteristic, **even a strength**, e.g. that appears to be what we are good at!

It is not a question of if a dryer or dryers will fail; it's a question of when ... WE ARE LVIING ON BORROWED TIME!!

2. WHERE IS ALL THE DEMAND COMING FROM

Our history, for most of the last 50 years, is one of an assault on animal fat and butterfat. We've seen declining per capita consumption of butter, we've seen fluid milks progressively transition from whole to 2% to 1% to skim, the introduction and growth of low-fat, no-fat yogurt ... while at the same time some other dairy product markets have been relatively immune, e.g. cream cheese.

In 2012, for the first time in 40 years, butter consumption did not decline. In fact, it increased a little in 2013, a lot in 2014 and probably a lot in 2015. At the same time, we are seeing a reversal in fluid milk consumption with growth in 2% and whole milk. While there is still significant growth in no-fat yogurt, there is more yogurt with normal and even high BF levels. Another factor is increased use of imported protein to make cheese. **Whereas fluid milk and cheese used to be sources of BF to make butter, more milk is needed to make the same amount of butter let alone meet growth in demand.**

There has been a lot of work / reviews done that demonstrates that the research done in the '60s never indicated a link between butterfat and serum cholesterol and butterfat and coronary heart disease.

In 2014, TIME Magazine published a cover article, "EAT BUTTER", that captured and popularized **what many consumers already know and were acting on**. It shows the power of the internet and social media. The message wasn't necessarily that BF is healthy but it clearly was don't avoid butter / butterfat. I say "Game on!". If we can produce and process the milk, the growth potential is there.

At the same time, consumers were more and more aware of labels ... they want a simple and natural ingredient deck ... there is no comparison between a real dairy product and those industrial, manufactured products that masquerade as substitutes.

Consumers are way ahead ... institutions and health professionals have not caught up, although they are probably getting closer but it doesn't matter. Consumers are playing a much more direct role in managing their own health and dairy, whether it's for the fat, the protein or both, is the beneficiary.

3. THE TRANS PACIFIC PARTNERSHIP (TPP)

The TPP was agreed to on October 5, 2015. I'm not going to get into any of the details but I'll make a number of observations.

Was it a good deal or a bad deal? My personal view is if there had to be a deal, it is a pretty good deal ... but there are others who take the opposite view ... and irrespective of whether it was good or bad, they have their reasons for that contrary position. Could it have been worse? Yes, a whole lot! At one level the US is trying to right what they consider failures in CUSTA and NAFTA. Our friends from NZ, despite all the issues they are facing in the dairy sector, are philosophically committed to deregulating the Canadian dairy market.

Two years ago, I said that, in the end, **the Americans will be our best friends ... and that largely proved to be true.** In fact, I think it was Japan who was our biggest ally. The US wanted significant access to Japan for beef, rice, dairy and other agriculture products. I believe Japan was prepared to open their market ... but, only if the US reciprocated. In the end, the US was not prepared to offer significant access ... not a surprise. Their method and objective is to gain access to other markets without giving up access. The Japanese were strong enough to counter the US.

Having said that, I want to acknowledge the significant work done by Canada's negotiators. While at one level access is estimated to be 3.5% of the market, some again for their own reasons, like to round that to potentially 4.0%. The deal is structured in a way, unlike CETA, where some of the access may not materialize. In other words, there is not a requirement to fill the TRQ. That probably suits the interests of the Americans and Japanese, unlike European countries that want to make sure their cheese is exported to Canada. I think Canada's team of negotiators did a terrific job and should be recognized for their efforts.

There is more good news ...

It became apparent that dairy was not holding up the TPP. There were much bigger issues, car parts, pharmaceuticals. If you think of the negative press we endured for almost two years, it became apparent there were other and bigger issues at play in the TPP. That negative press has virtually disappeared.

The other thing that happened is that ordinary Canadians started to think about where their milk and dairy products came from ... and they trust milk produced in Canada.

The other and biggest piece of good news is that the TPP was "the last trade negotiation with countries that have a significant interest in increased access to the Canadian dairy market". And no, there is not a re-negotiation provision in the TPP ... as some have suggested.

That means that for the first time since 1984, over 31 years, there is not the threat of a serious challenge to orderly marketing in Canada hanging over our heads and **none on the horizon for the foreseeable future!** It means that producers can invest, and plan for the next generation in a way they haven't been able to for over a generation.

Growth + no trade threat = opportunity

I'd like to say we are on the eve of a "golden era" in the Canadian dairy industry ...

But not so quick ... there are a couple of **defining issues** that have to be managed first ... and, will we be held back by our old nemesis, ineffective decision-making at the national level, small 'p' political interest; provincialism and people who prefer a bad outcome "with solidarity" to a good outcome, **as long as we have someone to blame!**

PART III – HOW DID WE GET INTO THIS PREDICAMENT?

Let me begin with a quote: "Time and patience are the two greatest forces".

This was recently shared with the DFO Executive by a prominent national producer leader.

The inference is that if we wait long enough, if we are patient ... good things will happen, "we'll", presumably will get a better result.

As I've thought about the quote, what keeps coming back in my mind is the question "**can we be clever but not smart?**"

1. So where are we?

- high and rising levels of imported proteins
- skim milk powder dryers that are at capacity (seasonally)
- dryers from coast-to-coast that "will fail"
- three years from the day a decision is made to a new ingredient plant processing milk
- significant and on-going growth in demand for BF
- the inability to supply current demand, let alone growth
- an unwillingness to implement short-term measures to address demand
- an ever increasing quantity of skim solids ending up as animal feed
- limited, if any, ability to increase quota for the indefinite future!

The seeds of today's issues were sewn in the early days of the current DOHA round of WTO negotiations.

- there was a lot of talk about the phase-out and elimination of export subsidies in 2003/04
- many expected a WTO agreement in Hong Kong in 2005 ... it didn't happen but was seen as a temporary set-back
- one result, in Canada, was the creation of the Dairy Industry Working Group (DIWG) in March 2006, producers, processors and government. Another issue, at the time → "0" tariff on MPI, a decision of the CITT
- 10 months later, the last meeting was held in January 2007 ... the objectives of the DIWG had essentially been "an ingredient strategy"
- no ingredient strategy but, as a result, the Minister ordered the creation of national cheese standards, and two years later the federal government created a TRQ and tariff for MPI
- Note that: neither has inhibited the flow of imported MPI
- FAILURE NUMBER ONE!
- Five years later in 2012, the Dairy Industry Producer Processor Dialogue (DIPPD) was formed, also with a view to implementing an ingredient strategy ... DPAC CEOs + DFC Executive, facilitated by AAFC
- within eight months that effort collapsed too
- FAILURE NUMBER TWO
- could the people involved have understood the consequences of not achieving an outcome?
- was failure ever an option?
- failure is 'acceptable' in a culture where you don't own the problem and are comfortable as long as there is someone to blame
- has the situation gotten worse since 2012 ... **immeasurably!**
- the situation has deteriorated to the point where we are dealing with different and bigger problems, much bigger!
- Is it fair to call the DIWG and DIPPD failures ... maybe not at the time, but in retrospect absolutely
- ... so attempt NUMBER THREE ... the P10 Negotiating Committee ... it's hard to say exactly when it started, we'll say it was initiated in the spring of 2014, it has already lasted longer than the previous two attempts

The provinces insisted that on the producer side, representation was from the provinces, an important distinction, Chairs and GMs. Negotiations continue ... discussions are "focused". I'll leave it at that.

2. DFO INGREDIENT STRATEGY

- on October 13, 2015, Dairy Farmers of Ontario announced that it was proceeding to implement an ingredient strategy in early 2016 if an agreement could not be reached at the national level by the end of 2015
- there are two key elements ... an ingredient class and a competitive price for skim solids
- there were / are two key strategic objectives whether that's at the national or provincial level ... maintain current producer income and get a commitment from Ontario's butter / powder processors to make the investments needed to sustain the industry. If that's not part of the outcome, we haven't done our job, at all!
- necessary investment means ... new ingredient plants ... using the latest technology ... to make products demanded by the market and built to a scale sufficient to meet current demand but also growth for the next 15 to 20 years
- the Board "saw" the future and determined **"Doing nothing was not an option!"**
- The magnitude and seriousness of today's problem is far greater than in 2006 and even 2012. I would argue that things are infinitely worse in 2015 compared to 2012 and that we have run out of time. We had a grace period of 11 years. Well, it just ended.
- I will share with you that "every other province" in the country and your national organization, DFC, has formally asked the Ontario Farm Products Marketing Commission to NOT grant DFO's request for the establishment of a new ingredient class!!
- I have no idea how the Commission will respond
- However, I do not believe any of the provinces have adequately thought about what happens if the Commission actually respects their requests!
- So if we revisit the quote "time and patience are the greatest forces", you tell me can you ever run out of time and patience?

PART IV – LEADERSHIP

- I just want to make a few comments on leadership. Two years ago I bought a book at the airport on "Leadership". I haven't even read the jacket yet, I'm relying on just carrying it around with me, for now.
- ... but I see leadership in real life ... I see it in action
- Leadership is that combination of having a vision, commitment and courage ... and knowing that you can't answer all the unknowns but you can answer enough to take a degree of risk to move forward
- Last year, I said "we know what needs to be done ... we'll see if we have the courage to do it"
- Well now we know!

- I want to share a personal observation ... **this version of the DFO Board is the best I've worked with in my 35 years**
- That doesn't mean we haven't had great Board Members, great Chairs and great leadership over our 50 years ... without a doubt we have
- Ralph keeps asking me to "quantify" what makes this Board so good ... not an easy thing to do
- But I think it comes down to a common sense of purpose, the ability to focus without being distracted and a deep commitment to making this industry great for current producers and future generations!!

PART V – MY VISION

As I near the end of my career ... and I want to thank the producers of Ontario, the Board(s) and the staff at DFO for all the support I've enjoyed over the years ... I want to share my vision of what a successful future looks like for the industry.

"It's a future where producers can plan and invest with confidence, where there is enough growth in the market so that when one producer expands it's not at the expense of another producer exiting the industry. When we achieve that, we'll know we have been successful."

PART VI – CONCLUSION

I started out by asking if anyone could see the future ... and if you could, what responsibility do you have?

The future could not be more clear, the outcomes could not be more clear, the choices could not be more clear.

Let's review the conditions:

- high and rising levels of imported protein
- dryers that are at capacity
- the inability to service current demand for butter and butterfat
- limited, at best, ability to issue more quota
- disposing of significant quantities of skim milk
- skim milk powder dryers that are at or approaching the end of their useful life ... we are living on borrowed time
- a compelling need to invest in infrastructure

The “**only**” solution that works is one that creates an environment that results in investments in infrastructure ... and sufficient capacity to meet market demand and produce the products demanded for the next 15 – 20 years.

There was a point when we did have time, regardless of whether you start the clock in 2003 or 2005 or 2006 or even 2012.

Did we use that time wisely? Probably not!

I think a reasonable person would conclude “we have run out of time”. If that’s the case, then what do we need to do? The answer is simple, “smarten up” and do it quickly.

There are three pre-conditions to secure the investments that are needed. That was true 12 years ago. It remains true today. They are:

- an ingredient class
- a competitive price
- and a growth strategy

I don’t want to say it’s not complicated ... it does require decisions, compromise and unanimity.

But without those three elements, we will continue our march to what I’ll call “a very unpleasant destination”.

There is also a widely held view in the country that governments will help less if industry is solving its own problems. First, it is absolutely not true ... that is exactly what governments want. Second, what would be so wrong if it was true ... that we actually did solve our problems?

All that, when I started out by saying we could at the beginning of a very positive, very productive period in the Canadian dairy industry ... full of opportunities and growth potential.

As you know, the DFO Board has taken the position “Doing nothing is not an option” ... and they have acted.

I’ll conclude by asking the question again “Can we be too clever but not smart enough?”

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FOOD FROM OUR FARMS AND FOOD FOR THOUGHT ABOUT MARKETING

2016 marks our 12th year with dairy products selected to help us “learn from lunch”. While many of our products are a continuation of themes we have looked at in the past, some are completely new. The products so graciously provided by your industry partners in the processing sector offer not just “food” but also “food for thought”. It is our hope that these products and the information presented about them will increase awareness and stimulate new interest among producers in the marketing side of the industry. We salute these products and the companies behind them as opportunities to expand markets, add value and strengthen the industry.

We welcome **Gay Lea** CEO Michael Barrett to our podium and we salute the co-op for all they do to build markets and shape the future. New processing capacity is the front page story, but new products like **Nordica Smooth Cottage Cheese** a unique single serve product that comes in three exotic flavours, vanilla bean, salted caramel and lemon, is also pretty exciting news. They have also provided **Nothing but Cheese** a shelf stable, single serve snack that takes convenience to a new level, and it is “blue cow” all Canadian as well. Gay Lea is also growing market share for producer members through acquisitions. Ivanhoe Cheese in 2008, and Salerno Cheese and Hewitt’s Dairy in 2014 have diversified and strengthened the co-op and that is good for the industry. We thank **Scotiabank** for sponsoring our milk purchase again this year and we chose to buy Gay Lea and indirectly from its Ontario dairy farmer members.

Canadian cheese makers are stepping onto the world stage and doing so with great success. At the 2015 World Cheese Awards 332 cheeses from around the world were awarded prizes including 30 from Canada!! So it seems that nearly 10% of the best cheeses in the world are made right here in Canada. We invited some of the winners to donate samples to our selection of “**World Class Canadian Cheeses**” and 5 have provided products. Local cheese maker **Mountainoak Cheese** was among the big winners with a Gold award for their **Mountainoak Premium Farmstead Gouda Gold**..... and **Bright Cheese and Butter Company** won silver for their **Old Cheddar** and bronze for **Asiago**. Family owned **Quality Cheese** in Vaughn won with four cheeses including their **Triple Cream Brie** and **Bella Casara Ricotta**. Since Ricotta is not a cheese you serve on a cheese board, today’s lunch features Lemon Thyme Ricotta Chicken made with gold award Bella Casara. Our bigger processors have world class products as well, as demonstrated by **Agropur**’s silver award **Oka** and gold award **Champfleury**. Last but by no means least, **Saputo** graces our table with **Météorite** (gold award) from **La Maison Alexis de Portneuf** and **La Tentation de Laurier** (bronze) from **La Fromagerie DuVillage 1860**, two highly regarded artisan cheese establishments they own in Quebec, where small scale cheese making is a long established tradition. As a reminder that cows are not the only milk producers, Saputo also contributed **Paillot de Chèvre** a silver award ripened goat cheese also from **Portneuf**, and Cantonniere from **DuVillage**. **Saputo** won gold in the whey based ricotta class with **Ricotta Di Campagna** so we will try to find a way to sample and compare with Bella Casara.

Artisan cheese continues to grow in Ontario, and a big story locally this year is the opening of **Stonetown Cheese** near St. Marys in November, 2015. For Hans and Jolanda Weber, the dream has become reality, and we thank them for their donation of **Wildwood, Grand Trunk** and

Homecoming, the three Swiss style cheeses produced at their St. Marys farm. Artisan cheeses made locally by family dairies in South Western Ontario stimulate the growing consumer interest in high end dairy products and add value as well as growing markets.

Local is by no means limited to cheese, as the sisters at **Shaw's Ice Cream** can verify. This Canadian family owned and operated plant and store is located on Highway 4 en route to Port Stanley and Lake Erie beaches. Shaw's Ice Cream has been a family favourite since 1948. They have maintained a legacy of creating the highest quality ice cream, using only the best ingredients starting with 100% Canadian cream. Their family recipe brings you the classic taste that you remember from years past, full of tradition and simply the great taste you love.

Eight and ten years ago we featured **Saputo's Milk2Go** as a new product with great flavours, suitable for vending and out of home consumption, in an attractive round container that fits in automobile cup holders. Convenience, out of home consumption and variety were all market demands emerging then and these demands continue today. We salute Saputo for their continued market development with two new approaches for Milk2Go. Along with the traditional flavours, they have added adult focused sophisticated new ones like **iced coffee** and **iced chai tea latte**. In recognition of the growing sports "post workout supplement" market, they also introduced **Milk2Go Sport** with 26 grams of milk protein in a convenient liquid form. The growing reputation of dairy as the sports beverage of choice should serve us well with health conscious consumers.

These processors are adding new dimensions to our dairy industry and reconnecting the consuming public with the dairy farm in ways that will help us move towards greater sustainability. Our supply management system depends on the support of government and ultimately on the support of the public and consumers. Whether it's local, health, convenience or gourmet, each of these products represents an opportunity taken, that can help us form bonds with consumers that will foster trust and empathy, and build relationships and markets for all Ontario dairy products.

Though not a dairy product, roasted soys have become a valued ration ingredient for cows and a great local snack for people as well. Thanks to **Blythe Brae Farms** for supplying these for our enjoyment.

Marketing is everyone's business . . . and we hope that we have stimulated your appetite, both for these innovative dairy products themselves and for the cooperative marketing approaches that our industry needs to expand the marketplace. We also hope that after the meeting you will make a point of buying and enjoying these products at home as well, in the interest of a bigger and stronger Canadian dairy industry.

Jack Rodenburg, on behalf of the Planning Committee.

**Thank you to all of our food sponsors
and to all innovators in the dairy sector
that are growing markets and building
relationships.**





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Nordica Smooth comes in 100g cups, making it a convenient, light snack to enjoy anytime day or night. With 25% more protein than leading Greek yogurts and a source of calcium, it is the sweeter way to replenish your body after a workout. And for those who hate cottage cheese, consider this your fresh slate.

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Mountainoak Cheese Ltd

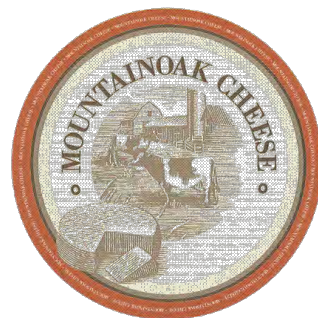
3165 Huron Road, New Hamburg, Ontario, N3A 3C3

Telephone: 519.662.4967

On-farm Store Hours, Fri. and Sat. 9 a.m. to 5 p.m.



Mountainoak Cheese is the culmination of a lifelong dream for Adam and Hannie van Bergeijk, and for their customers, it is a love affair with superb-quality artisan Farmstead Gouda cheeses. The van Bergeijks have more than 30 years experience as cheese makers and are both graduates of the cheese maker's school in Gouda, Holland, a centre of cheese making expertise for over three hundred years. In Holland,



they operated a small on-farm cheese plant and their prize winning cheeses were popular with local consumers. Adam and Hannie emigrated to Canada in 1996 and focused on dairy farming with their two sons. But their love for cheese making continued to call them and Mountainoak Cheese opened its state of the art processing plant in September 2012. Using their traditional Dutch recipes, they make superb quality farmstead cheese, and offer interesting variations on spiced Gouda, using traditional cumin as well as black pepper, mustard seed, nettles and even gourmet black truffles. The state of the art cheese plant is unique because it uses fresh uncooled milk straight from the cows for maximum freshness. And with no cooling and no transport, Mountainoak Cheese has the smallest possible environmental footprint.



Bright Cheese & Butter was established in 1874 by a group of local farmers who realized they had a surplus of milk each month from their livestock. Since then, not much has changed. By the turn of the twentieth century, cheddar had become Canada's second largest export and there were 1,242 cheddar factories in Ontario alone. Bright Cheese is the oldest remaining of these cheddar factories and we haven't even moved... We're in our original location from 1874!

To this day, we are still providing quality dairy to the Ontario region. We are well known for our all natural, naturally-aged cheese made with 100% local milk. Our cheeses are made the old-fashioned way with customer service at its finest. Bottom line, you've never tasted cheese this pure, and the proof is in the product. We can't wait to serve you and your family!



Quality Cheese Inc. is a manufacturer, distributor and retailer of Italian specialty cheese and cheese snack products including Bella Casara.. Incorporated in 1988, the company produces a large selection of specialty cheese for the retail and food service sectors.

Winner of numerous awards, Quality Cheese is widely recognized for its innovative product development, particularly an Italian soft blue cheese, and other soft cheeses.

Located in a 20,000-square-foot facility in the City of Vaughan, Quality Cheese is equipped with state-of -art equipment and their production facility can be viewed from the retail store.

The Current management team at Quality Cheese represents the fourth generation in a family tradition of cheese-making. The company's president, Almerigo Borgo Sr. emigrated from Italy more than 45 years ago and his legacy is being carried on by his sons, including Bill Borgo, a certified Cheesemaker.



It was in 1893, in an abbey protected by two mountains, that a small group of monks created OKA, one of Quebec's very first fine cheeses. Its secret? The know-how and patience of the Trappist monks, who baptized each cheese in a special wash that gave OKA its unforgettable taste and unique aroma.

Today, this Quebec tradition continues to be crafted in the very same cellars of the Cistercian Abbey. The cheese makers at Agropur religiously follow the ancestral recipe and prepare OKA with the same care in order to bring you this authentic Quebec cheese - part of our heritage for over 110 years. OKA, Quebec's original treasure since 1893.

Champfleury is a unique washed-rind soft cheese. It boasts a creamy and unctuous texture enveloped in a coppery orange rind that has a pronounced bouquet and an irresistible fruity flavour. It is a truly exceptional cheese.

The poppies featured on the packaging, are a link to the poppy field that each year grace the French countryside and a reminder of the French (Normandie) inspiration for this fine cheese.





Météorite from La Maison Alexis de Portneuf is a mellow, creamy, blue-veined, ash covered surface ripened cheese That has a delicate blue taste. Its creamy and supple texture is unique.

From Fromagerie Du Village , La Tentation du Laurier is a lactic cheese whipped with fresh pasteurized cream. A soft cheese with a washed rind. When young it has a creamy texture like that of whipped cream with a fresh cream flavour and a slightly acidic aftertaste. It ripens from the exterior towards the interior. The whipped texture becomes smooth and spreadable when it reaches its peak, bringing out the pronounced butter flavor. Give in to its luscious sensuality and the exquisite flavour of fresh cream.



Long ago, straw was used to transport goods. A single straw was inserted into the centre of the goat cheese in order to transport it within the province without damaging it. The paillot was created to pay tribute to our ingenious ancestors, who did everything possible to protect the quality of the fruit of their labour. This flavourful goat cheese from Alexis dePortneuf won a silver award at the 2015 World Cheese Awards

Cantonier is an uncooked, semi-soft, surface-ripened pressed cheese with a washed rind. It distinguishes itself with an effervescent flavour reminiscent of fruity cream and fresh apples. Though not entered in the World Competition in 2015, it has won numerous other awards for Fromagerie DuVillage 1860



In Italian, ricotta means "cooked twice". The Ricotta has a fresh spreadable texture with a light milky flavour. High in protein and calcium but low in fat, Ricotta is a very versatile. Saputo offers two types of Ricotta: Saputo Ricotta Fiorella made from 100% whole milk and Ricotta di Campagna made from whey.



Shaw's Ice Cream was established in 1948 by Carl Shaw and his family. Since this time, our operation has maintained a long tradition of producing fine quality ice cream. What's the secret to making such great tasting ice cream you ask? Well it's no secret at all, we simply use only the best ingredients and of course real Canadian cream! We take time in

sourcing the purest flavourings, fruits, and dairy ingredients to bring to you what we consider the world's best ice cream!

Shaw's is currently operated by sisters Kristine, Kelly and Kim. We are often found in our production room carefully making our famous products, or on the delivery truck or serving up splits in our dairy bar. We love our ice cream so much we eat as much as we can and whatever is left over we sell to you! So come experience the tradition and "Taste the Difference" while visiting our dairy bars where you can choose from over 41 different flavours made directly at our St. Thomas location. Enjoy our old fashioned milk shakes, coolers, sundaes or floats. There's something here for everyone! We even custom create Ice Cream cakes to suite any Occasion!



Milk2Go Sport is a high-protein flavoured milk beverage made from fresh skim milk. It contains 26 gm of protein to stimulate muscle repair after a work out, and is tastier and more convenient than powder based products. It also dulls hunger and could assist people trying to lose weight.

Original Milk2Go also comes in ten great flavours including new iced chai tea latte, and iced coffee





SWISS TRADITION, LOCALLY PRODUCED, FROM FARM TO TABLE.



Our commitment to produce high quality cheese is reflected in the care we give to our Holstein cows. They live in a clean and comfortable free stall barn and enjoy feed of the best quality. The fresh milk our cows produce is processed into a handcrafted, farmstead cheese. In order to obtain a great taste, the milk is unpasteurized and has no additives. This ensures the cheese is pure and natural.

5021 Perth Line 8, St. Mary's Ontario, TEL: 519.229.6856, EMAIL: info@stonetowncheese.com

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