



# **Maryland's Dairy Industry: 2020 Annual Report**

## **Maryland Department of Agriculture**

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Secretary

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Deputy Secretary

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## **Summary**

This report to Governor Larry Hogan is an assessment of the current state of the dairy industry in Maryland as well as policy recommendations to support the sector. It represents the recommendations of a committee that includes milk processors, dairy farmers, dairy cooperative leaders, Maryland Farm Bureau members, Maryland Grange members, and consumers, as well as representatives from state and local health departments, agriculture departments, the Maryland Department of Agriculture, the General Assembly, and University of Maryland officials. The Governor's Maryland Dairy Industry Oversight and Advisory Council is charged with improving and sustaining the economic viability of Maryland's dairy industry and reporting annually to the Governor.

According to research from the University of Maryland, in 2014, farmers received all-time high prices for milk at \$25 per hundredweight (cwt.). However, since then prices have steadily declined as national supply has outpaced demand. The past five-year prices have averaged just over \$17 per cwt. Costs of production on Maryland farms are about \$19 per cwt., which does not include family living withdrawals, principal payments on loans, or major capital improvements. Dairy farmers must try to make up the difference with cull and calf sales, crop sales, federal payments and other miscellaneous income. This difficult economic situation has contributed to the decline in the number of dairy farms from 455 in 2014 to 339 this year.

### **COVID-19 and Dairy**

*The University of Maryland's Agriculture and Resource Economics faculty prepared an assessment of COVID-19 on Maryland's agriculture sector. This is the assessment of dairy completed by Dale Johnson.*

COVID-19 exacerbated the already difficult economic situation for Maryland's dairy industry. With stay-at-home orders issued across the country with business, education, and government institutions closing, there was a change in demand for types of dairy products. For example, demand for single serving milk containers consumed in schools or bulk cheese used by restaurant chains was replaced by demand for quart or gallon milk containers and smaller packaging of cheese sold in grocery stores. It takes time for highly automated processing plants to retool for the different products. During this processing transition period, processors could not handle the continuous supply of milk and some farmers were forced to dump milk, nationally. Maryland producers, by and large, fortunately did not have to resort to such activities

The price volatility of this transition period is illustrated below in the class III milk futures prices (July 2020 contract, CME Group as reported at the beginning of June). Prices plummeted in February, March, and April to below \$13 per cwt., but then rebounded in May back to over \$19 per cwt.

However, prices for later in 2020 are projected to be lower as illustrated below in the class III milk futures prices (December 2020 contract, CME Group as reported at the end of September). The December contract at the end of September was trading in the mid \$17 per cwt. range.



Farmers experienced this same volatility in their prices and in most cases, farmers were paid for dumped milk. The economics of Maryland dairy farms is illustrated in the following chart. Data from the Maryland Dairy Farm Business Analysis conducted by Dale Johnson, University of Maryland Extension is summarized to show an average income, expenses and profit for farms participating in the analysis for the years 2017-2019. The farms participating in the analysis received an average of price of \$17.75 per cwt. for milk with livestock, crop and other sales bringing total income per cwt. to \$21.80. Subtracting out average costs of \$19.28 per cwt. leaves an average profit of \$2.52 per cwt. Multiplying by 200 cwt. of milk production per cow and 120 cows per farm generates an average profit per farm of \$60,696.

**Income, expense, and profit for an average Maryland dairy farm**

	Milk Price Per cwt	Total income per cwt	Total cost per cwt	Profit per cwt	Cwt per cow	Cows per farm	Profit per farm
2017-2019	\$ 17.75	\$ 21.80	\$ 19.28	\$ 2.52	200	120	\$ 60,696
2020	\$ 18.50	\$ 22.73	\$ 19.28	\$ 3.45	200	120	\$ 82,687

2017-2019 data, Maryland Dairy Farm Business Summary, University of Maryland Extension

2020 price of \$18.50 per cwt is the projected average price for the year.

Farm profit must cover family living, debt payments, major capital improvements

All things remaining equal the next line (2020) calculates the profit per farm under a projected average price of \$18.50 for 2020. This year is projected to be better than the past three years.

**Impact of Government Programs on Dairy Revenue**

In response to the COVID-19 pandemic and shocks caused by it to agricultural markets, the U.S. Congress passed the *Coronavirus Aid, Relief, and Economic Security Act* (CARES Act) that included \$9.5 billion to support agricultural producers impacted by COVID-19, and replenished borrowing authority to the Commodity Credit Corporation (CCC) by \$14 billion. On April 17, 2020, the U.S. Department of Agriculture (USDA) announced the Coronavirus Food Assistance Program (CFAP) that included \$3 billion for direct food purchases and distributions through local and regional distributors and \$16 billion in direct support of agricultural producers, including dairy producers. *Maryland dairy farmers received \$10.869 million from CFAP as of September 28, 2020.* CFAP2 rolled out on September 11, 2020 and includes dairy support.

Maryland dairy producers also have support through the 2018 Farm Bill. The new Dairy Margin Coverage (DMC) program is a USDA-Farm Service Agency insurance program for farmers. DMC continues to offer protection to dairy producers when the difference between the all-milk price and the average feed price (the margin) falls below a specific dollar amount selected by the producer. In 2019, Governor Hogan put \$1.5 million in state funds to assist Maryland dairies in participating in the DMC program. With this assistance, currently, 72% of Maryland’s dairies are enrolled in the DMC program. *Maryland dairy farmers received \$2.7 million from DMC in 2019. As of September 15, 2020, Maryland dairy farmers had received more than \$2.8 million in 2020.*

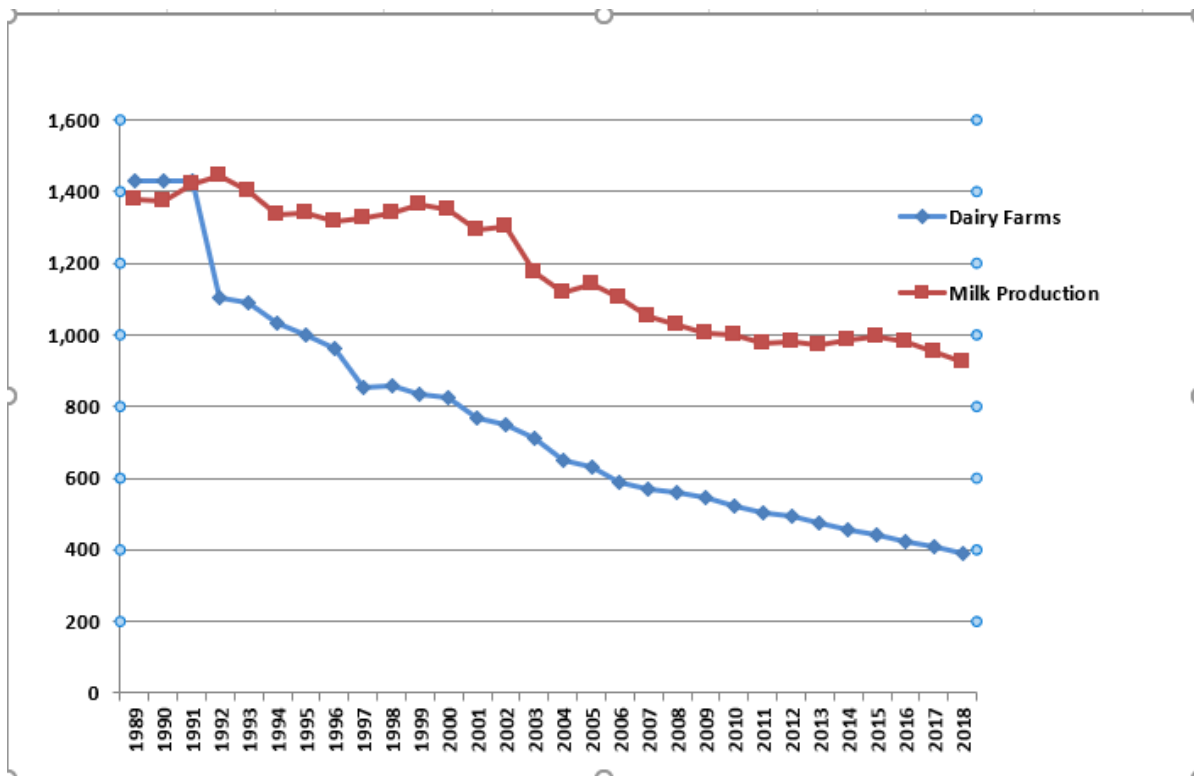
Maryland’s current milk processing capacity includes 41 operations (Attachment 2). There are six large, commercial dairy processors. The rest are smaller, on-farm processors. Since June 2016, Lance Dairy Farms Coop, LLC, based in Hagerstown, Maryland, has been operating a dairy processing plant in Hancock, which is producing cheese, pasteurized condensed milk and cream. Processors in the state annually process more than 10 billion pounds of milk, according to the Maryland Department of Health (MDH) and the Federal Milk Market Order. More than 40,000 loads of milk are hauled from farms throughout the mid-Atlantic to Maryland processors each year. Final products of all types are shipped throughout the nation and the world from Maryland. One plant, Nestle Dreyer's Ice Cream in Laurel, is among the largest ice cream

factories in the world.

The Advisory Council recommends that Governor Larry Hogan, the General Assembly and relevant state agencies:

1. Continue to prohibit the sale of raw milk for human consumption in Maryland.
2. Promote the importance of the Maryland dairy industry to the general public.
3. Oppose the marketing of plant-based beverages as ‘milk.’
4. Encourage the use of flavored and full fat milk in schools.

*Number of Maryland Dairy Farms, Production of Milk in State*



The number of dairy farms in Maryland has continuously declined since 1992; there are now 339. Milk production has been a steady decline as well, though not as severe as productivity of existing dairy farms has made up some of the difference. In 2010, milk production in the state was more than a million pounds. In 2019 it was 840,000 pounds.

## Recommendations

### Recommendation 1:

**The Governor and the General Assembly should continue to prohibit the sale of raw milk directly to Maryland consumers for human consumption.**

The Council is certain that the health risks associated with raw milk consumption are based on well-documented, sound science, and repeats its recommendation against allowing the sale of raw milk directly to consumers for public consumption. Pathogens in milk can cause very serious, sometimes life-altering conditions, and sometimes even death.

The only method proven to be reliable in reducing the level of pathogens in milk and milk products is proper pasteurization. Should raw milk be allowed for sale directly to the consumer, MDH anticipates an increase in the number of milk-related outbreaks and will likely incur more costs and require additional staffing for the routine regulation of raw milk as well as in the investigation and control of these outbreaks.

**Recommendation 2:**

**Maryland Department of Agriculture (MDA) and other state entities should promote the value and importance of the state’s dairy industry to the general public.**

MDA’s Marketing program should continue to work with Maryland Public Television’s Maryland Farm & Harvest to encourage episodes on the dairy industry. Also, the state’s Farm to School program should continue to celebrate dairy farming with the state’s school children.

**Recommendation 3:**

**MDA should work with the U.S. Food and Drug Administration (FDA) to ensure that plant-based beverages are not marketed as milk.**

FDA has been reviewing this issue since 2018. In a letter in response to a letter from the National Association of the State Departments of Agriculture in October 2020, FDA said *“FDA has completed its review of the approximately 13,000 comments we received in response to the September 2018 notice. We are now reviewing the data, research, and information provided in those comments to provide clarity around the labeling of plant-based dairy alternatives, a priority for the FDA. FDA is also considering citizen petitions it has received related to this issue. We also note that there are First Amendment considerations that must be taken into account when providing clarity around the use of names of dairy foods in the names of plant-based dairy alternatives.”*

**Recommendation 4:**

**The State of Maryland should work to increase access to higher fat milk in schools, as higher fat milk is better tasting and more likely to be consumed by children.**

Research published in February 2020 in the academic journal, *The American Journal of Clinical Nutrition*, concludes “Observational research suggests that high cow milk fat intake is associated with lower childhood adiposity. International guidelines that recommend reduced fat milk for children may not lower the risk of childhood obesity.”  
[doi.org/10.1093/ajcn/nqz276](https://doi.org/10.1093/ajcn/nqz276)

Attachment 1

**Maryland Dairy Economics**

Dale M. Johnson

Department of Agricultural and Resource Economics, University of Maryland

Dairy production is a significant agriculture enterprise in Maryland generating average farm gate milk revenues of ~\$160,000,000 annually over the past five years. The relative importance of the dairy industry can be seen when comparing it to the revenues of other Maryland agricultural industries - beef cattle <\$85,000,000, fruits & vegetable <\$60,000,000, and hogs >\$8,000,000 (USDA National Agricultural Statistics Service).

Dairy production is particularly important in central and western Maryland counties where it is concentrated because it is a value-added product that utilizes hay, corn silage and grain, and soybean oil meal, thus increasing the importance of field crops that generate open space. It requires about 200,000 acres of cropland to generate feed for the >40,000 milk cows and replacement heifers. It is unlikely that the demise of the dairy industry would be offset by other value-added agricultural enterprises and would result in a loss of agriculture in general and the associated jobs and economy. However, dairy production is contracting. Since 2014, about 125 of the 455 dairy farms (27%) have ceased operation.

**Milk Prices**

The main reason for the loss of dairy farms is that farm gate milk prices have plummeted from a high of \$25.00 per cwt. (2014) to below \$20.00 per cwt. every year since then as national supply has outpaced demand. Since 2014 the average price of milk has been \$17.49. Costs of production on Maryland farms are about \$19 per cwt. (Johnson, University of Maryland), which does not include family living withdrawals, principal payments on loans, or major capital improvements. Dairy farmers must try to make up the difference with cull and calf sales, crop sales, federal payments and other miscellaneous income.

It is even more revealing to look at milk prices since 2010. The graph and chart below show average milk prices per cwt. for Virginia, Pennsylvania, and Maryland since 2010.

2014-2020 Dairy statistics

Year	2014	2015	2016	2017	2018	2019	2020 projected
Number of Dairy farms	455	443	424	411	381	348	330
Cows per farm	110	111	113	117	118	121	121
Total number of cows	50,000	49,000	48,000	48,000	45,000	42,000	40,000
Lbs of milk sold per cow	19,680	20,000	19,854	19,750	20,378	20,000	20,500
Pounds of milk sold	984,000,000	980,000,000	953,000,000	948,000,000	917,000,000	840,000,000	820,000,000
Average price of milk/cwt	\$ 25.00	\$ 17.60	\$ 16.40	\$ 17.80	\$ 16.20	\$ 18.40	18.50
Value of milk sold	\$ 246,250,000	\$ 172,656,000	\$ 156,456,000	\$ 168,922,000	\$ 148,716,000	\$ 154,560,000	\$ 151,700,000

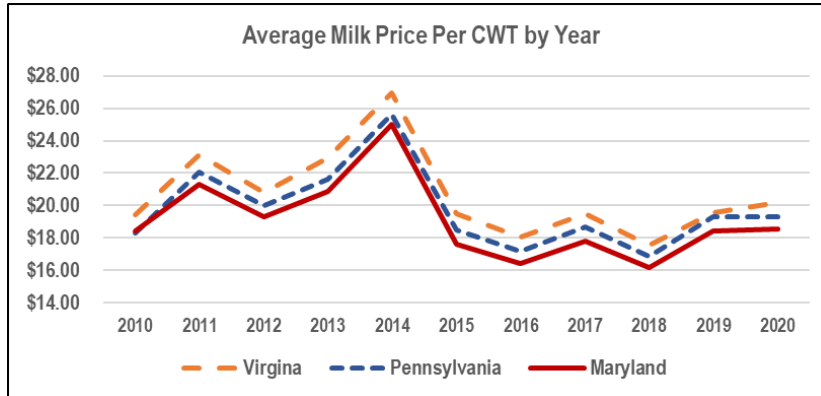
USDA National Agricultural Statistics Service, Maryland Department of Agriculture



**Average Milk Price Per CWT by Year**

State/Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Average
Virginia	\$ 19.43	\$ 23.10	\$ 20.83	\$ 22.93	\$ 26.97	\$ 19.46	\$ 18.03	\$ 19.46	\$ 17.57	\$ 19.58	\$ 20.18	\$ 20.69
Pennsylvania	\$ 18.28	\$ 22.09	\$ 20.01	\$ 21.63	\$ 25.62	\$ 18.48	\$ 17.16	\$ 18.66	\$ 16.87	\$ 19.28	\$ 19.28	\$ 19.76
Maryland	\$ 18.40	\$ 21.30	\$ 19.30	\$ 20.90	\$ 25.00	\$ 17.60	\$ 16.40	\$ 17.80	\$ 16.20	\$ 18.40	\$ 18.52	\$ 19.07

USDA National Agricultural Statistics Service, Maryland Department of Agriculture



Below are three observations about the Maryland price of milk.

1. The highest Maryland price per cwt. (\$18.40) of the recent five years (2015-2019), is the same as the lowest Maryland price per cwt. (\$18.40) of the previous five years (2010-2014).
2. The average Maryland price over this time period is \$1.62 per cwt. below Virginia price and \$0.69 per cwt. below the Pennsylvania price.
3. The Maryland annual price of milk will not go above \$20.00 per cwt. in for the foreseeable future.

**Land Prices**

Other economics work to the detriment of Maryland dairy farms. The average price of farmland and buildings in Maryland is much higher than the average price of land and buildings in Pennsylvania and Virginia as seen below.

**Price of land including buildings**

Maryland	\$8,080 per acre
Pennsylvania	\$6,600 per acre
Virginia	\$4,620 per acre

USDA National Agricultural Statistics Service

While higher land values increase a farm owner's net worth and provide more collateral to borrow against, it makes it more difficult to buy additional land to expand operations. It also makes it almost impossible for young farmers to get into dairying since a dairy operation cannot economically justify those land values inflated from development encroachment.

### **Feed Prices**

Low feed prices have benefited Maryland dairy farms the past few years. During the 2008-2014 period, analysts of the dairy farm sector began to put more and more attention on the threat of high feed costs. Dairy subsidy programs, which for decades had operated with the intention of keeping milk prices high, were modified to make payments based on a combination of relatively low milk prices and relatively high feed prices.

However, since 2014, feed costs have been relatively low and stable. In the years 2011-13, corn prices averaged \$6.28 per bushel; but since August 2014, corn prices have typically been below \$4.50, and are currently in the \$4 range.

Soybean prices show patterns like corn prices. In the high price 2011-13 period, soybean prices averaged \$13.52; since January 2015, soybean prices have (with only a few monthly exceptions) been below \$10. Over the past year, soybean prices plummeted to the low \$8 per bushel range but have since rebounded to the \$10 per bushel range.

Futures market prices in fall 2020 reflect the opinion of market traders that corn prices will remain in the high \$3 range and soybean prices will remain in the mid-\$9 range through 2021.

### **Farm Level Economics**

Since 1994, Dale Johnson has collected farm level data on income and expenses from Maryland dairy farmers. This is done through farm visits so that Johnson does not have to take possession of confidential, personal, tax, and accounting information. This typically occurs during March to May after taxes have been filed and before farmers begin work in the fields. This year, COVID-19 prevented these visits and analysis will resume in 2021. Consequently, the following analysis has not been updated with 2019 data.

The table below illustrates the income, expenses, and profit per cwt. of milk produced by 24 dairy farms (17 non-organic and seven organic) for the years

2016-2018. The average cost of production for non-organic farms for the years 2016-2018 is \$19.33 per cwt. (line 19). This does not include operator and family labor (family living) and debt principal payments. The average milk price per cwt. for the same time period is \$17.40 (Line 4). This is \$1.93 below the cost of production. While farmers have cattle sales and other income that help return a profit, the profit is inadequate for many farms. For example, the average profit is \$68,821 (line 21). Out of this profit, farmers must extract family living (often more than one family) and debt principal payments (land, equipment, livestock, and operating debt) which often results in a negative cash flow. There is a wide variability in farm financial performance and some farms are worse off than others. The third column under non-organic farms shows that the least profitable nine non-organic farms have a higher cost of production (Line 19, \$19.89/cwt.) than average and lower income than average (line 7, \$20.68/cwt.). They barely break even (line 20 and 21, \$0.79/cwt. or \$9,065/farm) before family living and debt principal payments are extracted.

2016-2018 Average of Maryland Dairy Farms Income, Expenses, and Profit per CWT		Non-Organic Farms			Organic 7 Farms
		Total 17 Farms	High 8 Farms	Low 9 farms	
1	Average number of cows	147	167	152	77
2	CWT of milk sold per cow	207	208	235	78
3	<b>Farm income</b>				
4	Milk sales	17.40	17.43	17.37	36.25
5	Cattle sales	1.33	1.21	1.50	5.20
6	Other income	2.92	3.66	1.81	3.87
7	Total income	21.66	22.30	20.68	45.32
8	<b>Farm expenses</b>				
9	Feed purchased	5.46	4.96	6.21	7.08
10	Seed, fertilizer, chemicals	1.92	2.22	1.47	2.42
11	Depreciation and repairs	2.91	2.96	2.84	7.60
12	Labor	0.89	1.00	0.71	1.68
13	Medical and breeding	0.87	0.79	1.00	0.59
14	Car, Truck, Fuel, Hauling	1.85	1.88	1.81	1.85
15	Rent	0.95	0.85	1.10	1.94
16	Interest	0.84	0.84	0.84	1.42
17	Custom hire	1.33	1.20	1.54	1.87
18	Other expenses	2.31	2.27	2.37	5.99
19	Total Expenses	19.33	18.97	19.89	32.44
20	Profit per CWT	2.32	3.33	0.79	12.04
21	Net profit per farm	68,821	144,801	9,065	65,585

The economics of organic farms are very different. Organic farms tend to be smaller (line 1, 77 cows compared to 147). The production per cow is lower (line 2, 78 cwt./cow compared to 207 cwt./cow) because of several factors, including cattle breed and feeding systems that rely primarily on pasture. Milk price is higher (line 4, \$36.25/cwt. compared to \$17.40/cwt.). Costs are also higher (line 19, \$32.44/cwt. compared to 19.33/cwt.). Profit per cwt. is higher (line 20, \$12.04/cwt. compared to \$2.32/cwt.). During this period the seven organic farms did better than the average non-organic farms. In comparing profit per farm, the organic farms were similar to the eight most profitable non-organic farms when the number of cows is taken into consideration.

However, organic farms are also feeling the pressure of changing economics. In 2019 and 2020, the price of organic milk decreased to the high \$20s or low \$30s per cwt. Some organic cooperatives have also limited the amount of milk they pay the organic price on and have limited the number of new farms that they will take on. Organic production is not an option for most dairy farms.

## Dairy Statistics

**Maryland Dairy Farm Numbers, Cow numbers, and Milk Production.**

Year	Number of dairy farms	Number of dairy cows	Cows per farm	Milk production (mill. lbs)	Milk pounds per cow
2003	710	77,000	108	1,177	15,286
2004	667	73,000	109	1,116	15,288
2005	649	71,000	109	1,143	16,099
2006	631	64,000	101	1,106	17,781
2007	582	58,000	100	1,051	18,121
2008	561	56,000	100	1,029	18,375
2009	555	54,000	97	1,004	18,255
2010	524	53,000	101	1,001	18,537
2011	505	52,000	103	970	18,654
2012	496	51,000	103	979	19,196
2013	482	50,000	104	972	19,440
2014	455	50,000	110	987	19,740
2015	443	49,000	111	983	20,061
2016	424	48,000	113	957	19,938
2017	411	48,000	117	953	19,854
2018	381	45,000	118	925	20,556
2019	348	42,000	121	840	20,000
2020	330 est.	40,000 est.	121 est.	820 est.	20,500 est.

USDA National Agricultural Statistics Service

## **Dairy Processing**

There are six large scale dairy processors in Maryland processing almost 10 billion pounds of milk annually from farms in Maryland and the surrounding the mid-Atlantic region. Dairy products from these processing plants are consumed in Maryland and exported nationally and internationally. There are also 44 farms involved in on-farm processing primarily for local sales.

Dairy processors have also faced difficult economic conditions as there is consolidation in the food processing sector and large retail grocery chains opening their own processing plants to supply dairy products for their stores.

## Attachment 2

### Maryland Dairy Processors

ASTI ICE LLC	1752A APPLETON ROAD	ELKTON
BROOMS BLOOM DAIRY	1616 S FOUNTAIN GREEN RD	BEL AIR
BUTLER MANUFACTURING LLC	10711 RED RUN BLVD STE 113	OWINGS MILLS
CHESAPEAKE BAY DAIRY	4111 WHITESBURG RD	POCOMOKE
CLEAR SPRING CREAMERY	14322 ST PAUL RD	CLEAR SPRING
CLOVERLAND FARMS DAIRY	2701 LOCH RAVEN RD	BALTIMORE
CLOVER HILL DAIRY	27925 WOODBURN HILL RD	MECHANICSVILLE
CROSSROAD COMPANY LLC	208 S PULASKI ST	BALTIMORE
DAIRY MAID DAIRY LLC	259 E 7th ST	FREDERICK
DELITEFUL DAIRY	16230 LONG DELITE LN	WILLIAMSPORT
DUMSERS DAIRYLAND INC	501 S PHILADELPHIA AVE	OCEAN CITY
FRUMEX PALETAS	5921 MORAVIA PARK DRIVE, UNIT C-4	BALTIMORE
GEMMA GELATO	1088 TAFT ST	ROCKVILLE
ISLAND CREAMERY BERLIN	120 N MAIN ST	BERLIN
ITABERCO INC	1900 BAYARD ST STE 110	BALTIMORE
ITALIAN KITCHEN LTD	4521 KENILWORTH AVE	BLADENSBURG
KEYES CREAMERY	3712 ALDINO RD	ABERDEEN

KILBY CREAM	785 FIRETOWER RD	COLORA
LAKESIDE CREAMERY	20282 GARRET HWY	OAKLAND
LANCO DAIRY FARMS COOP LLC	14738 WARFORDSBURG ROAD	HANCOCK
MANY SWEETS LLC	1900 BAYARD ST	BALTIMORE
MARVA MAID / MAOLA LANDOVER	1805 SOUTH CLUB DR	LANDOVER
MARYLAND & VIRGINIA MILK PRODUCERS	8321 LEISHEAR RD	LAUREL
MISTY MEADOW FARM CREAMERY	14325 MISTY MEADOW RD	SMITHBURG
MOBY DICK HOUSE OF KABOB	3329 75TH AVE	HYATTSVILLE
NESTLE DREYERS ICE CREAM CO	9090 WHISKEY BOTTOM RD	LAUREL
NICE FARMS CREAMERY	25786 AUCTION ROAD	FEDERALSBURG
NORWOOD ICE CREAM & CANDY CO	7556 MAIN ST	SYKESVILLE
POTOMAC FARMS DAIRY	PO BOX 2189	CUMBERLAND
POTOMAC ICE CREAM LLC	19209 M CHENNAULT WAY	GAITHERSBURG
PRIGEL FAMILY CREAMERY	4851 LONG GREEN RD	GLEN ARM
QUEEN CITY CREAMERY & DELI LLC	108 HARRISON ST	CUMBERLAND
SACRED MOUNTAIN LLC DBA MOORENKO'S ICE CREAM	8810 BROOKVILLE ROAD	SILVER SPRING
SAPUTO DAIRY FOODS USA LLC	2711 N HASKELL AVE STE 3700	DALLAS
SCOTTISH HIGHLAND CREAMERY	314 TILGHMAN ST	OXFORD

SOUTH MOUNTAIN CREAMERY	8305 BOLIVAR RD	MIDDLETOWN
TAHARKA BROTHERS	3515A CLIPPER MILL RD	BALTIMORE
THE CHARMERY ICE CREAM	1700 W 41ST ST #400	BALTIMORE
THE SCOTTISH HIGHLAND CREAMERY	102-104 S MORRIS ST	OXFORD
TITO'S ICE CREAM	5351 46TH AVE	HYATTSVILLE
TOTALLY COOL INC	36-40 GWYNNS MILL CT	OWINGS MILLS
WOODBOURNE CREAMERY	28600 RIDGE RD	MOUNT AIRY
YORK CASTLE ICE CREAM CO INC	6771 MID CITIES AVE	BELTSVILLE