



Maryland Department of Agriculture

Office of the Secretary

Larry Hogan, Governor
Boyd K. Rutherford, Lt. Governor
Joseph Bartenfelder, Secretary
Julianne A. Oberg, Deputy Secretary

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March 3, 2020

The Honorable Lawrence J. Hogan, Jr.
Governor
100 State Circle
Annapolis, MD 21401

The Honorable Adrienne A. Jones
Speaker
Maryland House of Delegates
State House, H-101
100 State Circle
Annapolis, MD 21401

The Honorable Bill Ferguson
President
Maryland Senate
State House, H-107
100 State Circle
Annapolis, MD 21401

RE: Report Required by EX ORD 01.01.2006.07 - MSAR #6029

Dear Governor Hogan, Speaker Jones and President Ferguson:

EX ORD 01.01.2006.07 states, "The [Maryland Dairy Industry Oversight and Advisory] Council shall report to the Governor by October 1 of each year with recommendations to support a coordinated State strategy for the dairy industry."

I have included the 2018 and 2019 annual reports. I hope you find the information contained in these reports useful. Should you have any questions, please do not hesitate to reach out to Cassie Shirk, Director of Legislation and Government Affairs, at cassie.shirk@maryland.gov or 410-841-5889.

Sincerely,

Joseph Bartenfelder
Secretary, Department of Agriculture



Maryland's Dairy Industry: 2019 Annual Report

Maryland Department of Agriculture

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Governor

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Members of the Dairy Advisory Council

Samuel G. Tressler III – *Chairman*, Dairy farmer, Mount Airy
Amanda Rife - Land 'O Lakes Dairy Cooperative
Louis 'Pete' DeBaugh – Dairy Farmers of America Cooperative
Jody Vona – Dairy Maid Dairy, Frederick
Joseph Milazzo – Marva Maid Dairy, Landover
Kim Young – Milk hauler, Frederick
William Chomicki – Maryland & Virginia Milk Producers Cooperative, Laurel
Marla Caplon – Montgomery County School System
Michael Haines – Dairy farmer, Taneytown
Janet Stiles Fulton – Dairy farmer, Boonsboro
Mary Creek – Dairy farmer, Hagerstown
Matt Hoff – Dairy farmer, New Windsor

Non-voting members

Delegate Jay Jacobs, Rock Hall
State Senator J.B. Jennings, Bel Air
Steve Connelly, Assistant Secretary, Maryland Department of Agriculture
Dr. Robert Peters, University of Maryland College of Agriculture and Natural Resources
Kyle Shannon, Chief, Center for Milk and Dairy Product Safety, Office of Food
Protection, Maryland Department of Health
Barbara Brookmyer, Health Officer, Frederick County Health Department

Staff

Cheryl Eichelberger, Maryland Department of Health
Mark S. Powell, Maryland Department of Agriculture

Executive Summary

This report to Governor Larry Hogan 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 (MDA), 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.

During 2019, Maryland's dairy farmers saw modest gains in the prices paid for their milk, up to \$18.67 a hundredweight vs. \$16.20 on average in 2018. Also, Governor Hogan supported the dairy industry with a cost-share program for the U.S. Department of Agriculture's (USDA) new Dairy Margin Coverage (DMC) program. The Governor included \$1.5 million in his supplemental budget to pay premium costs for Tier I production in 2019 (up to 5 million pounds of milk produced) at the \$9.50 margin coverage level. As of this writing, MDA had distributed more than \$680,000 to dairy farmers. More funds will be distributed in 2020 as producers took advantage of USDA incentives as well and committed to DMC for 5 years.

In spite of these positive developments, Maryland continued to lose dairy farms. The state lost 32 dairy farms from October 2018 to October 2019. There are now 348 dairy farming operations left. In the last decade, dairy farm numbers have fallen by 213. Broken down by county, dairy farms are located in: Baltimore, 7; Caroline, 4; Carroll, 24; Cecil 32; Charles, 1; Frederick, 60; Garrett, 49; Harford, 20; Howard, 2; Kent, 10; Montgomery, 3; Prince George's, 2; Queen Anne's, 5; St. Mary's, 13; Talbot, 5; Washington, 110; and, Worcester, 1.

According to USDA, Maryland had about 44,000 dairy cows in January of 2019. That is down from 47,000 last year and 57,000 a decade ago.

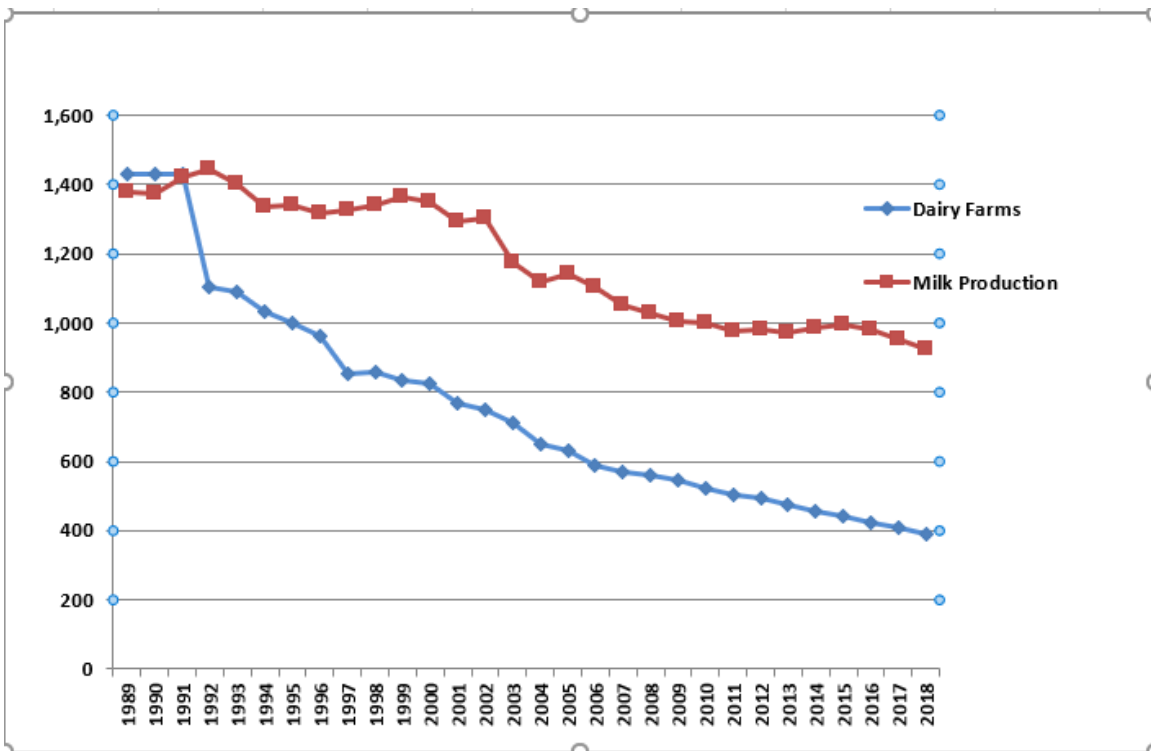
Maryland's current milk processing capacity includes 50 operations (Attachment 2). There are six large, commercial dairy processors. The rest are smaller, on-farm processors. Since June 2016, Lance Dairy Farms Coop, LLC., based in Hagerstown, Maryland, has been operating a dairy processing plant in Hancock, 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.

Attachment 1 of this report provides an economic analysis of Maryland's dairy sector by University of Maryland economist Dr. Howard Leathers and Farm Management Specialist Dale Johnson.

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. Develop risk management policy recommendations for the Maryland congressional delegation that will support the economic viability of Maryland's dairy farmers.
3. Promote the importance of the Maryland dairy industry to the general public.
4. Oppose the marketing of plant-based beverages as 'milk.'
5. Work to increase access to higher 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 yet production has been fairly stable since 2011.

2019 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:

Develop risk management policy recommendations for the Maryland congressional delegation that will support the economic viability of Maryland's dairy farmers.

As this report is being written, the American Farm Bureau Federation and other organizations are developing financial risk management tools to better serve dairy farmers. It is important that MDA and other agriculture organizations follow and analyze these policy recommendations in order to provide insight to Maryland's congressional delegation and the federal administration where necessary.

Recommendation 3:

MDA and other state entities should promote the value and importance of the state's dairy industry to the general public.

Recommendation 4:

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

Recommendation 5:

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. Additionally, 2018 research from Tufts University and others indicate that milk fat may not increase heart disease when consumed in moderation.

Attachment 1

Dairy Situation and Outlook, October 2019

Howard Leathers
Dale Johnson
University of Maryland, College Park, MD.

This report discusses the three most important factors influencing the financial health of dairy farmers in Maryland and discusses the outlook for the upcoming year. The three factors are: (1) milk prices; (2) feed prices; and (3) the regulatory and policy environment.

Milk Prices

Over the past few years, Maryland milk prices have varied greatly – averaging almost \$25 per hundredweight (cwt.) in 2014 and falling below \$16/cwt in 2016, and then again in early 2018. The monthly low in recent years was \$15.30 in May 2016, but prices have rebounded since then. They reached about \$19.50 in January 2017, and now (in late summer and fall of 2019) are in the range of \$18.35-19.35.

The outlook for Maryland’s dairy farmers is for milk prices to rise slightly during the remainder of 2019, and then to fall back to current levels in 2020.

Maryland Milk Prices 2016 to 2019.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual
2016	16.76	16.44	15.85	15.75	15.30	15.40	16.58	17.42	17.78	17.27	18.06	19.33	17.20
2017	19.51	19.01	18.09	17.05	17.11	17.83	18.00	18.63	18.44	18.24	18.38	17.67	17.80
2018	17.18	15.60	15.88	16.22	16.44	16.65	15.85	16.45	17.05	17.75	17.35	16.75	16.20
2019	16.95	17.15	17.85	18.05	18.35	18.45	19.05	19.25	18.35	20.41	20.44	19.75	18.67
2020	18.95	18.59	18.55	18.62	18.76	18.88	19.08	19.20	19.29	19.24	19.10	18.81	18.92

Estimated Maryland Milk Prices (Jan 2016 to Sep 2019). Projected Maryland Milk prices (Oct.2019 to Dec. 2020). 2016 - 2018 annual price is not estimated or projected, but is calculated from 2016, 2017, 2018 State Agricultural Overview USDA/National Agricultural Statistics Service (NASS).

Feed Prices

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/bushel; but since August 2014, corn prices have typically been below \$4 and are currently in the \$4 range. (Flooding in late spring interfered with planting, and corn prices rose to \$4.50 in early June; however, by late August, the corn crop appeared to have been little impacted by the spring floods, and prices fell to \$3.50 before rebounding to their current level of \$4.)

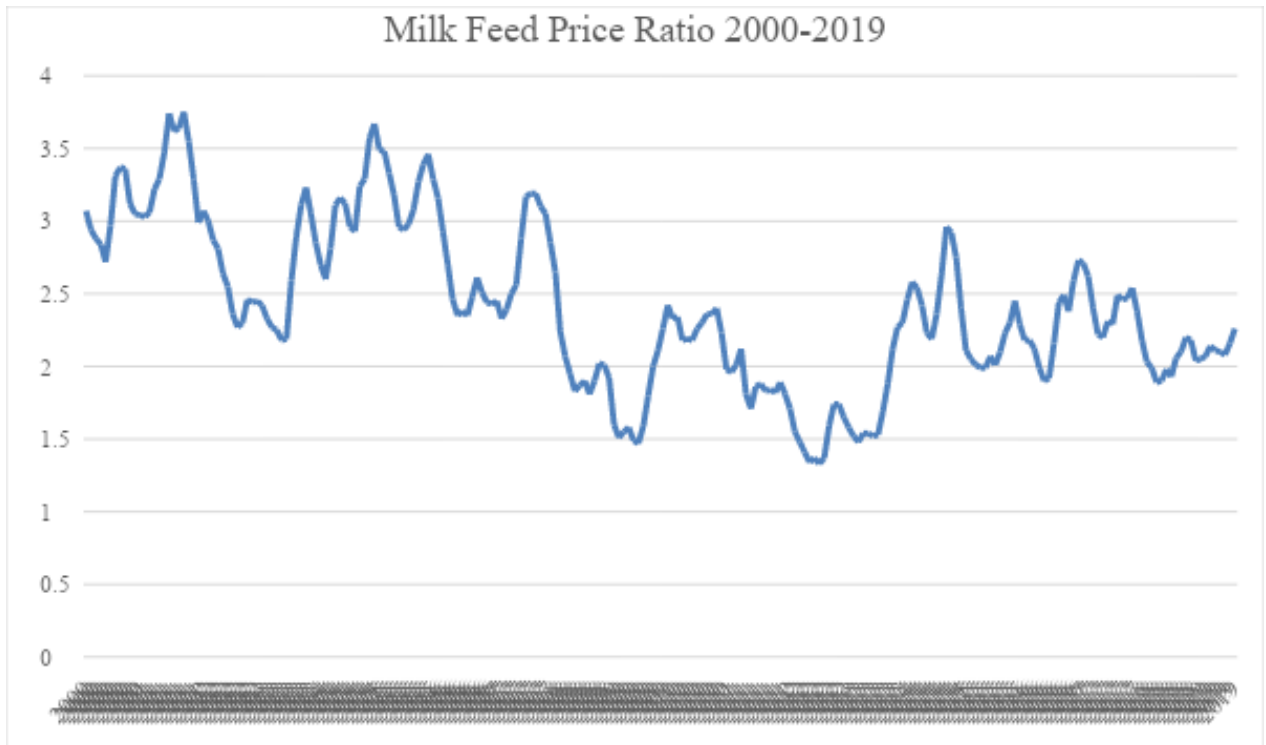
Soybean prices show patterns like corn prices. In the high price 2011-13 period, soybean prices averaged \$13.52; since January 2015, soybean prices have (with only a few monthly exceptions) been below \$10. Over the past year soybean prices have usually fluctuated in the \$8.75-\$9.25 range, though they did drop briefly below \$8 in May of 2019, based on fears of a trade war.

Futures market prices in fall 2019 reflect the opinion of market traders that corn prices will rise modestly throughout the next year – in the \$4-\$4.20 in 2020. Soybean futures show a similar pattern – rising to mid-\$9 range during 2020. Therefore, the modest increases in milk price expected during 2020 are expected to be offset by higher feed prices.

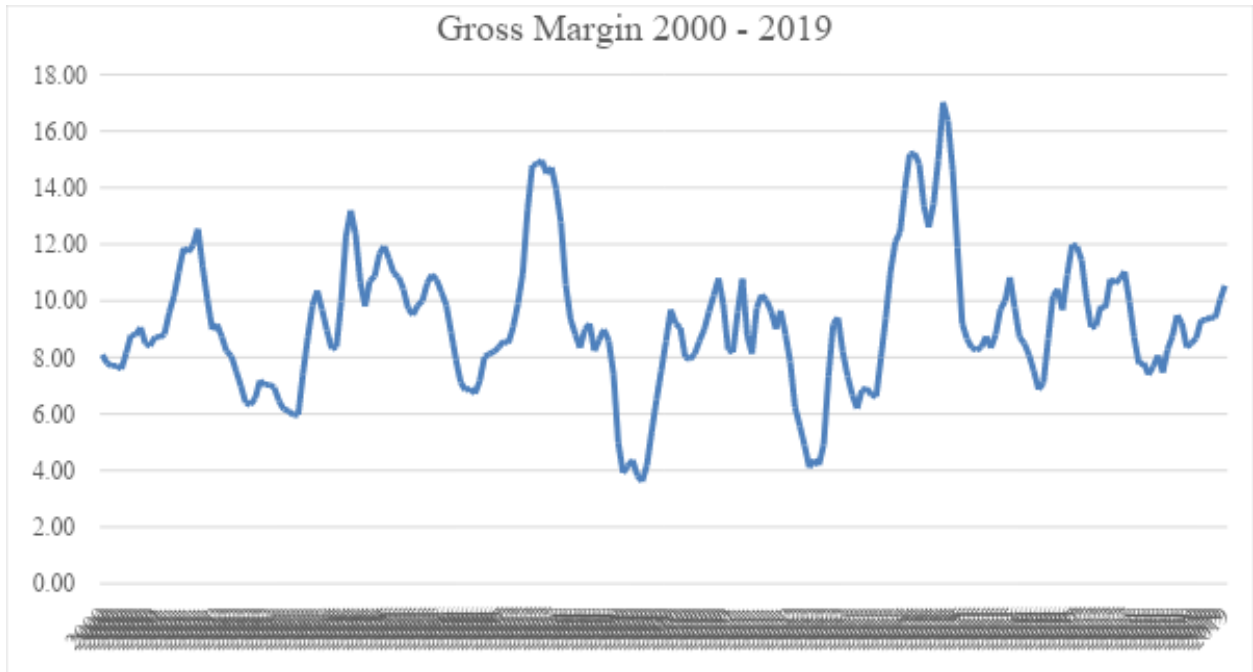
Milk-Feed Price Ratio and “Gross Margin”

Two commonly used measures of economic health of the dairy industry reflect both milk prices and feed prices, as measured by a formula that estimates the feed costs (corn, soy, and hay) associated with producing 100 pounds of milk. The two measures combine these prices in different ways. These two measures are the “milk-feed price ratio” and the “gross margin”.

The “milk-feed price ratio” (as the name suggests) is calculated as the milk price divided by the feed price. A high ratio means that milk prices are high relative to feed prices, and therefore times are “good” for dairy farmers. A low ratio means times are “bad.” For decades, the milk-price ratio was above 2; however, in the 2008-2013 period, the ratio frequently fell below 2. It did rise to nearly 3 in the “glory year” of 2014 when the milk price reached \$25.



The “gross margin” is calculated as the milk price minus the dairy feed ration price. This measure has become a more popular way of looking at dairy farmer financial health. A “crop insurance” policy has been developed that allows dairy farmers to insure against a level of gross margin; and the 2014 Farm Bill introduced a new dairy subsidy program (the Dairy Margin Protection Program, or MPP) that makes subsidy payments based on the extent to which gross margins fall below specified levels. Of course, the two measures (milk price ratio and gross margin) are built upon the same fundamental price measures, so they will show the same general pattern, though not the exact same values.



During the “hard times” of May-July 2012 one measure of the gross margin (all milk price minus 16% feed ration price per cwt of milk produced) was in the low \$4 range. During the “strong price” period of 2014, the gross margin averaged in the reached a high of \$17. Since 2015 the gross margin has been in the \$7-\$12 range, hovering at \$8 for most of 2018, and rising to \$10 during 2019.

As described above, looking forward to the upcoming year, we anticipate that dairy margins facing farmers will remain at current levels. Futures markets predict that the 2020 average milk price will be up about \$0.30 over the 2019 average. Feed prices are expected to show modest increases over the coming year. Therefore, the prospect for dairy margins is that they will be in the \$8-\$10 every month over the 2019-2020 period.

Regulatory and Policy Impacts on Dairy Farmers

The financial health of dairy farmers is also affected by actions and decisions of the government.

At the federal level, the 2014 Farm Bill adopted a radical change in the programs intended to help dairy farmers. The principal new program in that bill (the MPP) promised payments to dairy farmers when gross margins fall below \$4. However, as the above discussion notes, gross margins haven’t been below \$4 very often. (Farmers were given the option of “buying up” to higher guaranteed margins, in \$0.50 increments up to \$8, but this required premium payments, and in 2017, only four Maryland farmers opted for a buy-up, and the highest buy-up was at the \$6.50 trigger level.)

As the 2018 Farm Bill process got underway in 2017, it was widely believed that the 2014 Farm Bill dairy provisions had not worked as well as anticipated to help dairy

farmers. That was addressed with the passage of the Bipartisan Budget Act in February 2018, and the 2018 Farm Bill.

The general structure of dairy program (called the Dairy Margin Coverage program) under the 2018 Farm Bill is similar in structure to the MPP authorized by the 2014 Farm Bill. As a reminder, that structure is this:

- A price-feed cost margin is calculated by subtracting the cost of feed needed to produce a hundredweight of milk from the price of a hundredweight of milk.
- When the margin falls below a fixed level (sometimes referred to as the “insured margin”, farmers collect a payment.
- The basic level of insured margin is \$4, but farmers are permitted to “buy-up” raising the insured margin level, by paying a premium for higher coverage (in 50 cent increments up to \$9.50).
- The premium structure has two “tiers” – the cost of insuring the first 5 million pounds of milk (per year) -- Tier I -- is lower than the cost of insuring pounds above the 5-million-pound level -- Tier II.

During 2019, the margins calculated for this program have ranged from \$7.71 (in January) to \$9.85 (in August). Farmers who elected to “buy up” to the maximum coverage have received modest payments under the program in 2019. Overall, Maryland farmers have received \$2.6 million in program payments during 2019, averaging about \$0.35 per cwt. at a time when milk prices are in the \$17-20 range.

Fewer dairy farms in Maryland

The trend toward fewer dairy farms in the state continues. The Maryland Department of Health measure of farms licensed to sell milk has fallen by 51%, from 710 in 2003 to 348 in October 2019. Over the same period, milk production has dropped by about 30%. The forces behind these trends – increasing output per cow (37% from 2003-2019) and increasing cows per farm (17% from 2003-2019) – will probably continue for the foreseeable future. Although there is no reliable data on the age of dairy farmers, there is concern in some quarters that the decline in number of dairy farms may accelerate as baby boomers reach retirement age.

The reduction in numbers of farms comes primarily from consolidation of existing herd. Since 2003, farm numbers have dropped more than half of the initial level; but milk production has only dropped by 30% – to 70% of initial level. The decline in the number of Maryland dairy farms is likely to continue at about the same rate over the next year, about 20-30 farms exiting the industry.

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

Year	Number of dairy farms in Maryland	Number of dairy cows in Maryland	Maryland cows per farm	Maryland milk production (mill. pounds)	Maryland milk pounds/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	43,000 (est.)	126	910 (est.)	21,000 (est.)

Source: Farm numbers -- Maryland Department of Health
 Number of cows, milk production -- Milk Cows and Production reports, National Agricultural Statistics Service

Almost two-thirds of the 348 dairy farms are in three counties: Washington, Frederick and Garrett.

Baltimore	7
Caroline	4
Carroll	24
Cecil	32
Charles	1
Frederick	60
Garrett	49
Harford	20
Howard	2
Kent	10
Montgomery	3
Prince George's	2
Queen Anne's	5
Saint Mary's	13
Talbot	5
Washington	110
Worcester	1

Farm Level Economics

The table below illustrates the income, expenses, and profit per hundred pounds (cwt) of milk produced by 24 dairy farms (17 non-organic and seven organic) for the years 2016-2018 surveyed by Dale Johnson, University of Maryland. 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, which help return a profit, this 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 (Lines 20 and 21, \$0.79/cwt or \$9,065/farm) before family living and debt principal payments are extracted.

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, the organic farms were like the eight most profitable non-organic farms when the number of cows is taken into consideration. The profit per farm for organic farms is about half of those eight non-organic farms, but the number of cows per organic farm is also about half of the number of cows of those eight non-organic farms.

Organic farms are also feeling the pressure of changing economics. In 2019, the price of organic milk decreased to the high \$20s to low \$30s per cwt for many organic farmers. 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.

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	Farm income				
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	Farm expenses				
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

Attachment 2

Maryland Dairy Processors

ASTI ICE LLC	1752A APPLETON ROAD	ELKTON
ATWATER'S	2905 WHITTINGTON AVE	BALTIMORE
BROOMS BLOOM DAIRY	1616 S FOUNTAIN GREEN RD	BEL AIR
BUTLER MANUFACTURING LLC	3150 BALTIMORE BLVD	FINKSBURG
CHAPELS COUNTRY CREAMERY	10380 CHAPEL RD	EASTON
CHERRY GLEN FARM INC	16120 BARNESVILLE ROAD	BOYDS
CHESAPEAKE BAY DAIRY	4111 WHITESBURG RD	POCOMOKE
CLEAR SPRING CREAMERY	14322 ST PAUL RD	CLEAR SPRING
CLOVER HILL DAIRY	27925 WOODBURN HILL RD	MECHANICSV
CLOVERLAND FARMS DAIRY	2701 LOCH RAVEN RD	BALTIMORE
CROSSROAD COMPANY LLC	208 S PULASKI ST	BALTIMORE
DAIRY MAID DAIRY LLC	259 E 7TH ST	FREDERICK
DELITEFUL DAIRY	16230 LONG DELITE LANE	WILLIAMSPORT
DUMSERS DAIRYLAND INC	501 S PHILADELPHIA AVE	OCEAN CITY
FIREFLY FARMS INC	107 S MAIN ST	ACCIDENT
FIRENZES GELATERIA	25 MARKET SPACE	ANNAPOLIS
FRUMEX PALETAS	5921 MORAVIA PARK DRIVE, UNIT C-4	BALTIMORE
HIGH COUNTRY CREAMERY AND MARKET LLC	97 LOCKER LN	GRANTSVILLE
ITABERCO INC	1900 BAYARD ST STE 110	BALTIMORE
ITALIAN KITCHEN LTD	4521 KENILWORTH AVE	BLADENSBURG
KEYES CREAMERY	3712 ALDINO RD	ABERDEEN
KILBY CREAM LLC	785 FIRETOWER RD	COLORA
LAKESIDE CREAMERY	20282 GARRET HWY	OAKLAND
LANCO DAIRY FARMS COOP LLC	14738 WARFORDSBURG ROAD	HANCOCK
MANY SWEETS INC	1900 BAYARD ST STE 160	BALTIMORE
MARVA MAID LANDOVER	1805 SOUTH CLUB DR	LANDOVER
MARYLAND & VIRGINIA MILK PRODUCERS	8321 LEISHEAR RD	LAUREL
MEADOW MOUNTAIN NUTRITIONAL INC	14500 NATIONAL PIKE	FROSTBURG
MISTY MEADOW FARM CREAMERY	14325 MISTY MEADOW RD	SMITHSBURG
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
OLMO BROS NURSERY & FARM	1704 OLD GENERALS HWY	ANNAPOLIS

ONE ROOF LLC	2905 WHITTINGTON AVE	BALTIMORE
POTOMAC FARMS DAIRY	RACE ST & W IND	CUMBERLAND
POTOMAC ICE CREAM LLC	19209 M CHENNAULT WAY	GAITHERSBRG
PRIGEL FAMILY CREAMERY	4852 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 SPRNG
SAPUTO DAIRY FOODS USA LLC	428 EAST PATRICK STREET	FREDERICK
SCOTTISH HIGHLAND CREAMERY	314 TILGHMAN ST	OXFORD
SHEPHERDS MANOR CREAMERY LLC	1126 SLINGLUFF RD	NEW WINDSOR
SOUTH MOUNTAIN CREAMERY	8305 BOLIVAR RD	MIDDLETOWN
TAHARKA BROTHERS	3515A CLIPPER MILL RD	BALTIMORE
THE CHARMERY ICE CREAM	1700 W 41ST ST #400	BALTIMORE
TITO'S ICE CREAM	5351 46TH AVE	HYATTSVILLE
TOTALLY COOL INC	36-40 GWYNNNS MILL CT	OWINGS MILLS
WOODBOURNE CREAMERY AT ROCK HILL ORCHARD	28600 RIDGE RD	MOUNT AIRY
YORK CASTLE ICE CREAM CO INC	6771 MID CITIES AVE	BELTSVILLE