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RESTRUCTURING AMERICA'S DAIRY FARMS*

JOHN A. CROSS

ABSTRACT. As the number of American dairy farms rapidly declines, the character and spatial distribution of the remaining farms is undergoing fundamental change. Concentrating on an examination of both the smallest commercial farms (with 10–49 cows) and the largest dairy operations (with at least 500 cows), this study shows that megadairies are spreading from California into Idaho and America's traditional dairy belt, while Amish farmers are growing in prominence among those milking fewer than fifty cows. Although the greatest proportional declines in dairy farms have been among the smaller operations, average farm size throughout much of the nation remains well below 100 cows. Within a decade Amish farmers may operate one-fifth of the nation's dairy farms as they expand across the traditional dairy belt, and 500-cow dairies in the Midwest will outnumber those in California. *Keywords:* agricultural change, Amish, dairy farms, megadairies, United States.

The number of farms with milk cows in the United States has been declining steadily. Between 1992 and 2002, for example, it fell by 40.8 percent (calculated from U.S. Census Bureau 1994 and NASS 2004). During that decade production shifted from the traditional leading dairy states of Wisconsin and Minnesota toward Arizona, California, New Mexico, and Idaho. Maps in the *Agricultural Atlas of the United States* portray the distribution of milk cows, their change in inventory from 1997 to 2002, and the dispersal of 200-plus-cow dairy farms, but they fail to depict many of the changes in the nation's dairying (NASS 2005b). This article examines the change in dairying at the county level between 1992 and 2002 by analyzing data from the last three censuses of agriculture (U.S. Census Bureau 1994, 1999; NASS 2004)—in particular, data for farms of various sizes—and projects future changes by drawing on a recent survey of agricultural officials in the nation's leading milk-producing counties.¹

Census-enumerated dairy farms have decreased nationally for all sizes of operation except herds of 500 or more cows. These large operations grew from 1.9 to 3.2 percent of all farms with milk cows since 1997, and they had 41 percent of all milk cows in 2002. Those dairy operations with 200–499 cows declined by 335 farms between 1997 and 2002 to 4,546 operations, yet the total number of cows fell by only

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✪ DR. CROSS is a professor of geography at the University of Wisconsin–Oshkosh, Oshkosh, Wisconsin 54901.