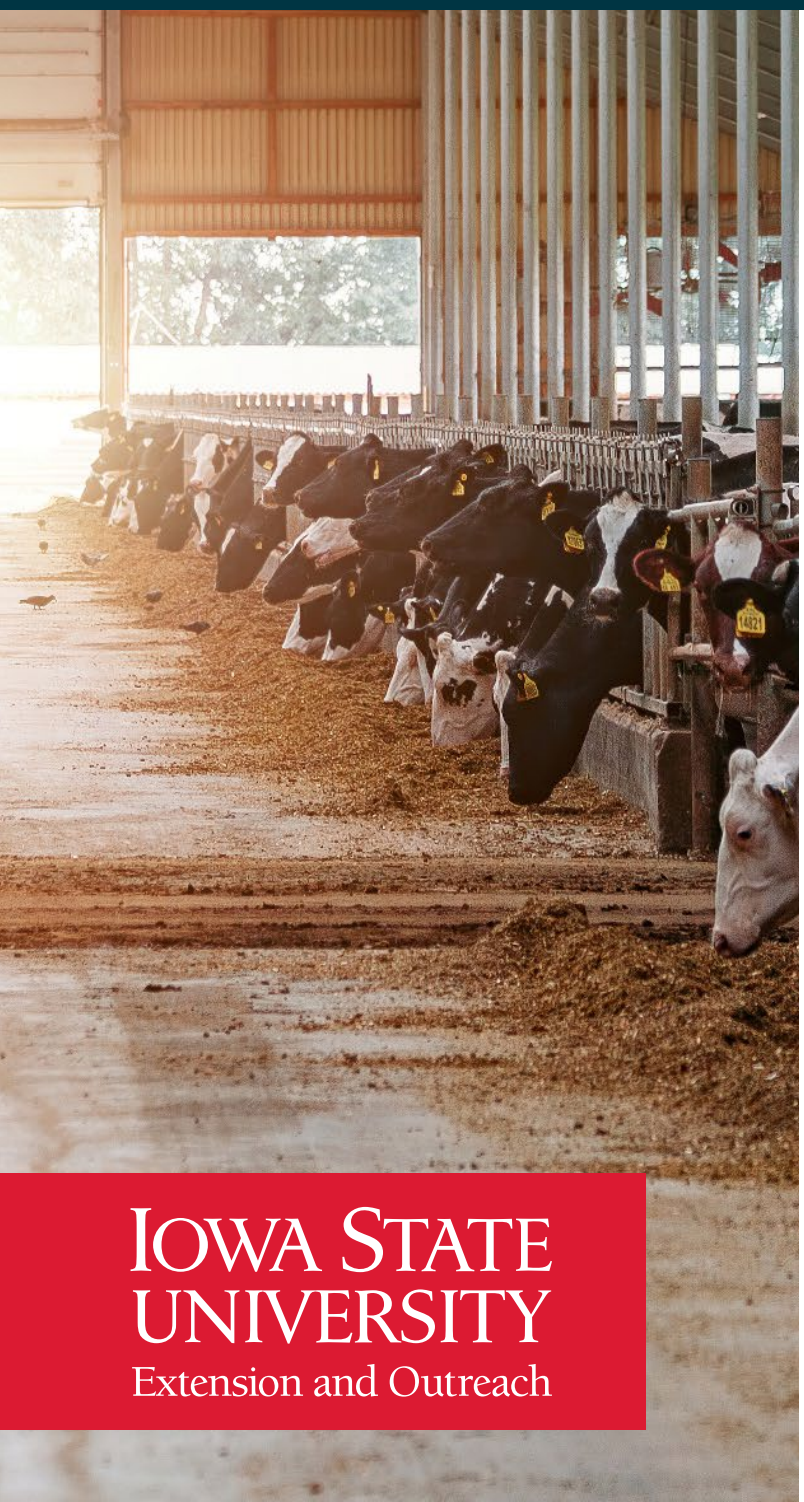
2024

Iowa Dairy Producer Survey



IOWA STATE UNIVERSITY
Extension and Outreach

In 2024, Iowa State University Extension and Outreach administered a survey to Iowa dairy producers to assess the current state of the industry, identify producer needs, and inform future educational programming. The typical Iowa dairy operation that responded to this survey milked fewer than 100 cows, was operated primarily by family labor, and was managed by a male operator with an average age of 53.5 years. The median herd size was 90 cows, although the Northwest region of the state, centered around Sioux County, averaged 1,190 cows, reflecting the substantial geographic variation in Iowa's dairy industry.

Several notable trends emerged when comparing 2024 results to the 2020 survey. Beef semen utilization increased dramatically, from 49% of herds in 2020 to 66% in 2024, reflecting broader national trends in beef-on-dairy integration. Adoption of reproductive technologies also increased, with 51% of herds now using synchronization programs and 44% using health indexes in sire selection, compared to 42% and 21% respectively in 2020. Operators are also working substantially longer hours, averaging 76 hours per week compared to 66 hours in 2020.

Milk price volatility remained the dominant financial concern, with 80% of respondents indicating it had a very great impact on their farm business. Commodity prices and milk hauling costs were also identified as high-impact issues. The labor situation facing Iowa dairy farms is challenging. Producers cited compensation, reliability, and workforce availability as primary obstacles to retaining qualified employees. Family labor remains the backbone of most operations, with nearly one-third of responding farms using no hired labor. Formalized human resources practices such as employee handbooks and scheduled training are largely absent from smaller operations, but are more common on farms with larger herds, where a higher proportion of employees speak Spanish as their primary language.

Succession and the future of the industry present a complex picture. While 86% of respondents affirmed that family-operated dairy farms are essential to the future of rural Iowa, only 54% indicated they would encourage the next generation of their family to enter dairy farming, and only 56% felt their farm was financially stable enough to support the next generation. A substantial proportion of respondents indicated plans to discontinue milking within the next 10 years, underscoring the need for succession planning resources and beginning farmer support programs.

Quality of life satisfaction improved modestly since 2020, with 70% of respondents reporting satisfaction compared to 60% four years prior. However, farmers' mental health remains a concern; 50% of respondents reported observing or personally experiencing high levels of stress, and 44% indicated that mental health has become a bigger issue in the past five years.

Introduction

In 2024, the Center for Survey Statistics and Methodology–Survey Research Services (CSSM-SRS) at Iowa State University was contracted to conduct an online/mail survey with dairy farmers in Iowa to learn about their current operations, needs, and expectations for the future. This survey was part of a research effort coordinated by Jenn Bentley, Gail Carpenter, Fred Hall, and Larry Tranel, dairy specialists with Iowa State University Extension and Outreach, who served as principal investigators on this project.

Results provide insight into the current state of the dairy industry in Iowa and will be summarized through reports for educators, industry collaborators, elected officials, and the public. This information will help educators and industry collaborators determine educational programming objectives in the short and long term. Additionally, results will help all audiences better understand the demographics of dairy farms, management practices used, and the future of the industry.

Where applicable, results from the 2024 survey are compared to the 2020 Iowa Dairy Producer Survey to highlight changes in the Iowa dairy industry over time.

Methods

The sample for this study consisted of 682 dairy cattle producers in Iowa and was provided to CSSM-SRS by the Principal Investigators. Only Grade A and B dairy cattle producers were included in the sample. Goat and sheep dairies, university-owned, and duplicate dairies with the same owners were excluded.

The survey was developed cooperatively by CSSM-SRS and the Principal Investigators and was built upon the 2012 and 2020 Dairy Producer Surveys. The 2024 survey was eight pages in length and included questions relating to farm characteristics, dairy farm management, crop management, employee and family labor, issues in the dairy industry, expected farm updates, and farm/personal demographics.

The survey was programmed using Qualtrics survey software, and printed copies of the survey were prepared by CSSM-SRS. Survey packets were assembled and mailed to 682 dairy farmers on August 1, 2024. The survey packet included a cover letter, which included a link to the online survey, a paper survey, a postage-paid return envelope, and a $2 bill to thank producers for their time. An email invitation was sent to the 162 producers for whom email addresses were available on August 7, 2024. A postcard reminder was sent to 609 non-respondents with valid addresses on August 13, 2024. A second copy of the survey was mailed to 544 non-respondents with valid addresses on August 20, 2024.

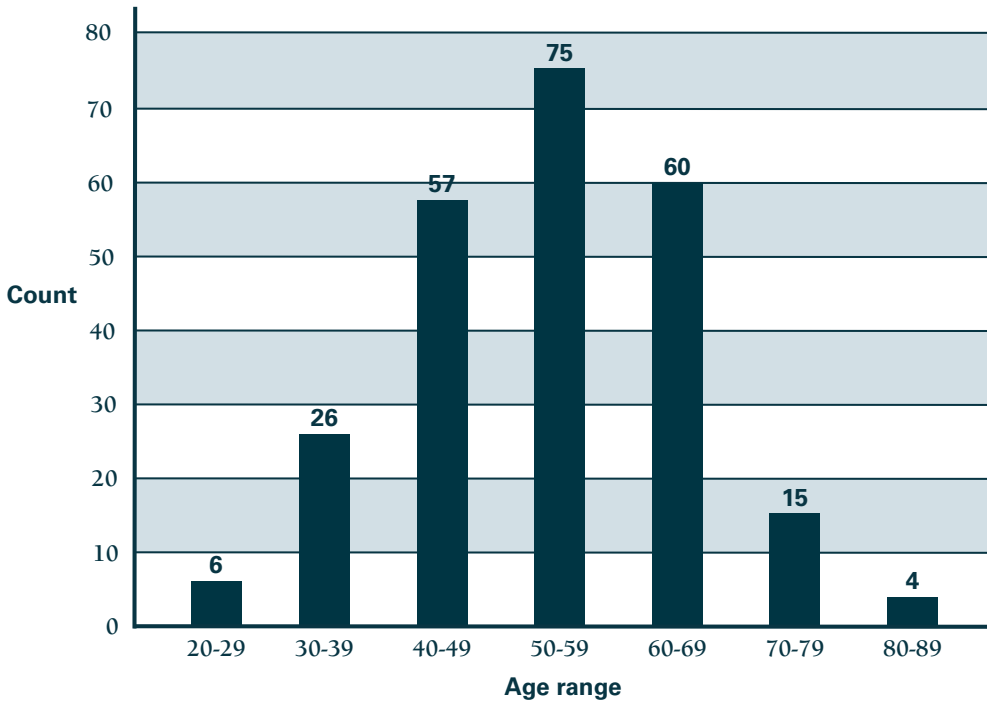
Throughout the data collection period, CSSM-SRS staff monitored and recorded the receipt of 250 completed surveys. Completed surveys were coded and data were entered into the Qualtrics survey instrument. Eleven survey packets or postcards were returned by the United States Postal Service because there was no mail receptacle, or the forwarding order had expired. Two people contacted CSSM-SRS to refuse to complete the survey. Three dairy producers were found to be ineligible. One was deceased, and the other two sold their cows. There was no response from the 416 remaining dairy producers in the sample.

Results

Demographics and Farm Characteristics

The average age of respondents was 53.5 years of age, and 31% of respondents were between 50-59 years of age (**Figure 1**). Twenty-three percent of respondents were between 40-49, and 25% were between 60-69. This is very similar to the average age and distribution in the 2020 survey.

Figure 1. Reported age of respondents.



Ninety-two percent of respondents were male, compared to 99% who completed the 2020 survey. Women were more represented in the 2024 survey than in the 2020 survey, at 8% of responses. 97% of respondents identified as White/Caucasian.

Sixty-five percent of respondents indicated that neither they nor their spouse (if married) worked any regular off-farm job in 2024 (n = 243 respondents). Twenty-three percent indicated that either they or their spouse worked full-time off-farm, and 12% indicated that either they or their spouse worked part-time off-farm.

Response rate by county is reported in **Table 1** for the top 10 responding counties. Dubuque County represented the highest number of responses at 8.8% of responding dairies, followed by Delaware and Winneshiek at 7.6% of responses each. Dubuque was also the highest reporting county in 2024, with 25 farms and 11% of responses. When summarized by the United States Department of Agriculture (USDA) Ag District 1, the Northeast district had the highest number of responses at 131 farms (**Table 2**). For the purposes of reporting, districts with one or two farms reporting were consolidated into "Other." These regions included West Central, Southwest, and South-Central Iowa. The Northwest district, containing Sioux County, had the greatest average herd size at 1,190 cows (n = 21), and the Southeast district had the smallest average herd size at 76 cows (n = 27). The Southeast district contains Washington County, where Kalona, Iowa, is located, with a high number of Amish producers.

Table 1. Response rate by county for the top 10 responding counties.

County	Count	Percent	Farms 2020	Percent
Dubuque	22	8.8	25	11.0
Delaware	19	7.6	19	8.3
Winneshiek	19	7.6	12	5.3
Howard	17	6.8	10	4.4
Johnson	15	6.0	16	7.0
Floyd	14	5.6	13	5.7
Clayton	14	5.6	18	7.9
Fayette	13	5.2	12	5.3
Allamakee	11	4.4	9	3.9
Davis	10	4.0	-	-

Table 2. Number of responses by state region as defined by the USDA.

Region	Number of farms	Average herd size
Northeast	131	179
East Central	34	252
North Central	32	111
Southeast	27	76
Northwest	21	1,190
Other	5	824

Table 3. Distribution of respondents by herd size (milking and dry cows).

Herd size	Farms	Percent
Less than 50	39	16
50 to100	96	40
101 to250	69	29
251 to 500	20	8
501 to 1,000	5	2
More than 1,000	13	5
Total	242	100

Herd Size and Structure

The average reported herd size (milking and dry cows) for respondents (n = 242) was 270.2 cows, and the median herd size was 90 cows, with 56% of respondents milking under 100 cows (**Table 3**). This was similar to 2020, when 20% of farms that responded were under 50 head, 37% were 50-100 head, and 29% were between 100-250 cows.

When divided into agricultural statistics districts per the National Agricultural Statistics Service (NASS), the region with the most responses was the Northeast, with 131 farms responding and an average herd size of 179 cows (**Table 2**). The region with the largest average herd size was the Northwest, with 21 farms, but an average herd size of 1,190 milking and dry cows. Thus, while the Northwest region had fewer responses, it represented a greater number of cows.

Only three Grade B producers completed the survey; the remaining were Grade A.

Map and County Listing
nass.usda.gov/Statistics_by_State/Iowa/Publications/Crop_Report/IA_Ag_Districts_Map.pdf

Facilities – Milking Systems

Respondents were asked to indicate which milking systems they used on their dairies (**Table 4**). In total, 247 respondents completed the question, and 21 respondents indicated more than one milking system. Reflecting the skew in respondents towards smaller dairies, the most common reported milking system was tie-stall or stanchion (n = 86, 35% of respondents), followed by parallel parlor (n = 59, 24% of respondents). The average herd size for respondents who milk in tie-stalls or stanchions was 61 cows, and the average herd size for respondents who milk in parallel parlors was 577 cows. The milking system with the highest average herd size was rotary parlors, with an average herd size of 3,590 cows. This is consistent with responses from the 2020 survey.

Approximately 9% of respondents milked using either a retrofit robotic milking system or a new robotic milking system (**Table 4**). This is similar to respondents to the 2020 survey. The average herd size for respondents milking in retrofit or new robotic milking systems was 240 and 234 cows, respectively.

Table 4. Responses to "Which of the following milking systems do you use?"

Milking system	*n*	Percent of total	Average herd size
Tie-stall/Stanchion	86	35	61
Flat parlor	8	3	66
Step-up parlor	10	4	94
Swing parlor	16	6	168
Herringbone parlor	31	13	183
Parallel parlor	59	24	577
Para-bone parlor	28	11	133
Carousel/rotary parlor	6	2	3590
Robotic milking system-retrofit	11	4	240
Robotic milking system-new	13	5	234
Total responses	**247**		

Respondents were allowed to select more than one response; thus, the percent of total sums to over 100%.

Facilities – Housing and Bedding

Respondents were asked about housing options for lactating cows and were able to select as many as applied from a list of options (n = 250 responses). The most common housing type for lactating cows was free stalls, with 62% of responses, followed by tie-stall/stanchion at 31.2% of responses (**Table 5**). The same question was asked for dry cows (n = 246 responses; **Table 6**). The most common response was bedded pack (54.9%), followed by "other, such as pasture or dry lot" (47.2%).

Table 5. Responses to "Which of the following housing systems do you use for lactating cows?"

Housing system	*n*	Percent of responses
Tie-stall/Stanchion	78	31.2
Free stall	155	62
Bedded pack	40	16
Loafing shed	22	8.8
Other, such as pasture or dry lot	55	22

Respondents were allowed to select more than one response; thus, the percent of total sums to over 100%.

Table 6. Responses to "Which of the following housing systems do you use for dry cows?"

Housing system	*n*	Percent of responses
Tie-stall/Stanchion	5	2.0
Free stall	71	28.9
Bedded pack	135	54.9
Loafing shed	68	27.6
Other, such as pasture or dry lot	116	47.2

Respondents were allowed to select more than one response; thus, the percent of total sums to over 100%.

Respondents were asked to select which bedding they use on their milking herd (n = 246 responses; **Table 7**). The most common response was sand (38.2%), followed by sawdust (28%) and mattress (25.6%). "Other" was selected by 22% of respondents. When asked to specify, common responses to other bedding materials used included straw and cornstalks.

Table 7. Responses to "What type of bedding do you use for your milking herd?"

Bedding type	*n*	Percent of responses
Sand	94	38.2
Manure solids	9	3.7
Water beds	17	6.9
Mattress	63	25.6
Bedding pack	47	19.1
Sawdust	69	28.0
Other	54	22.0

Respondents were allowed to select more than one response; thus, the percent of total sums to over 100%.

Grazing Practices

Respondents were asked if they use management-intensive grazing for their milking herd (n = 247 responses) or heifers (n = 243 responses). Twenty-four percent of respondents indicated they utilize management-intensive grazing for their milking herd. The average herd size for these respondents was 66 cows, compared to an average herd size of 339 cows for respondents who do not use management-intensive grazing for their milking herd.

Similarly, 23% of respondents indicated they use management-intensive grazing for their heifers with an average herd size of 79 cows. Respondents who indicated they do not use management-intensive grazing for their heifers averaged 339 cows in their milking herd.

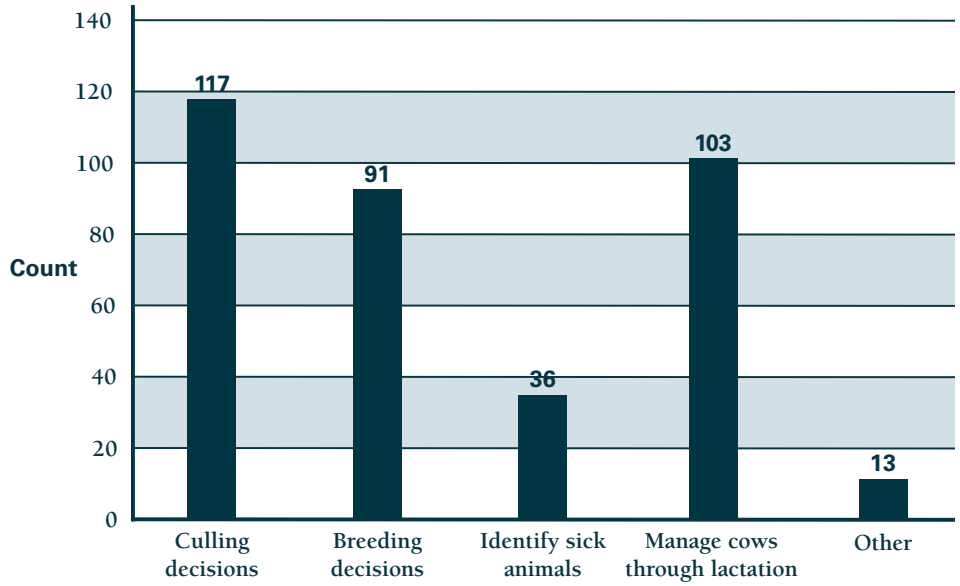
Respondents who practice management-intensive grazing were more highly represented in the 2024 survey compared to 2020, when 14% and 16% reported using management-intensive grazing for their milking cows and heifers, respectively. This practice seems to be more commonly used by small dairies.

Records and Breeding

Fifty-four percent of respondents indicated that they are on test with an established dairy records processing facility (n = 248 total respondents). This is up from 49% in 2020. As shown in **Figure 2**, respondents commonly indicated using test-day records for culling decisions (n = 117) and managing cows through lactation (n = 103). Other reasons indicated were breeding decisions (n = 91) and identifying sick animals (n = 36). Seven of the 13 respondents who indicated "other" for the question of how they use their test-day records reported that they use these records to identify cows with high somatic cell counts.

Respondents were asked whether they used certain breeding practices, and their responses are presented in **Table 8** including reproductive strategies and breeding strategies. The most commonly selected practices were "use of a synchronization program for reproduction" at 51% (n = 121 indicated "yes") and "use of health indexes in sire selection" at 44% (n = 104 indicated "yes"). This is an increase from 2020, when 42% of respondents indicated they use a synchronization program and 21% reported using health indexes for sire selection. Additionally, a higher proportion of farms indicated using heat detection aids such as chalk (32% vs. 22% in 2020), heat detection technology such as collars (28% vs. 20% in 2020), genomic testing (15% vs. 11% in 2020), or A2A2 as part of sire selection (31% vs. 16% in 2020).

Figure 2. Reported use of test-day records for respondents on test with an established dairy records processing facility.



Beef semen utilization on dairy farms has increased in recent years, and this is reflected in the responses to this survey. Use of beef semen increased from 49% of respondent herds in 2020 to 66% in 2024 (n = 247 total respondents). Respondents who use beef semen reported using it on 37.5% of their milking cows and 30.2% of their heifers, on average. The proportion of respondents using sexed semen also increased since 2020, with 51% reporting using it in 2024 compared to 40% in 2020. Respondents who use sexed semen reported using it on 36.4% of their milking cows and 56.8% of their heifers, on average.

Table 8. Breeding management practices/technologies.

Management practices	Count	Percent of farms
Use heat detection aids such as patch, chalk, etc.	76	32
Use a synchronization program for reproduction	121	51
Use heat detection aids that use technology such as movement collars or tags	67	28
Test animals using genomics	37	15
Include A2A2 as part of genetic selection	74	31
Use health indexes in sire selection	104	44



Major concerns when choosing a beef sire are reported in **Figure 3** (n = 157). When asked to indicate their major concern when choosing beef sires, the most common responses were calving ease (30%) and conception rate (25%). 56% of respondents indicated they market their beef-on-dairy cross calves at birth **(Figure 4**). Nearly a quarter of respondents (23%) indicated that they finish out their crosses.

The major story over the four years since data were last collected in this survey is the explosion in the use of beef semen in dairy systems. This is consistent with trends in both the beef and dairy industries.

Figure 3. Number of respondents that reported a major concern when choosing a beef sire.

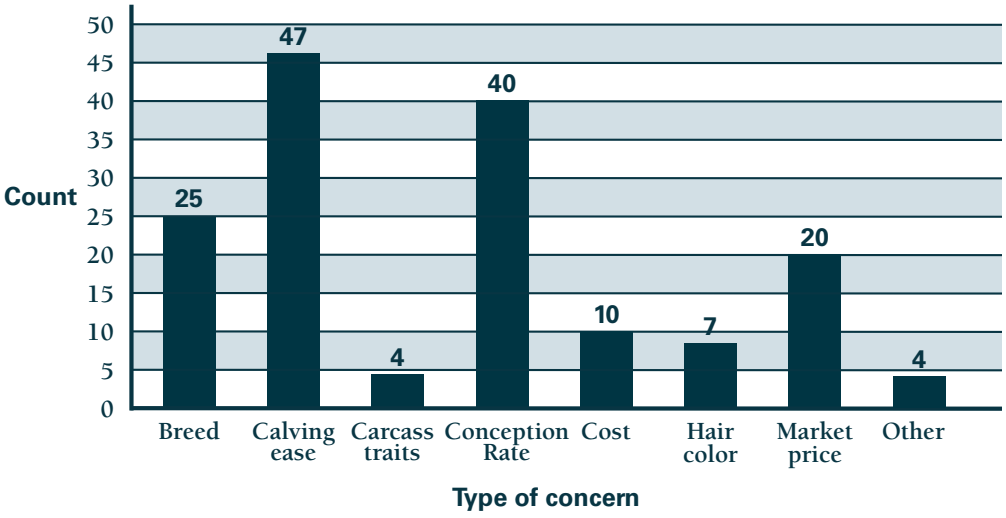


Figure 4. Responses to the question "When do you market your beef-on-dairy calves?"

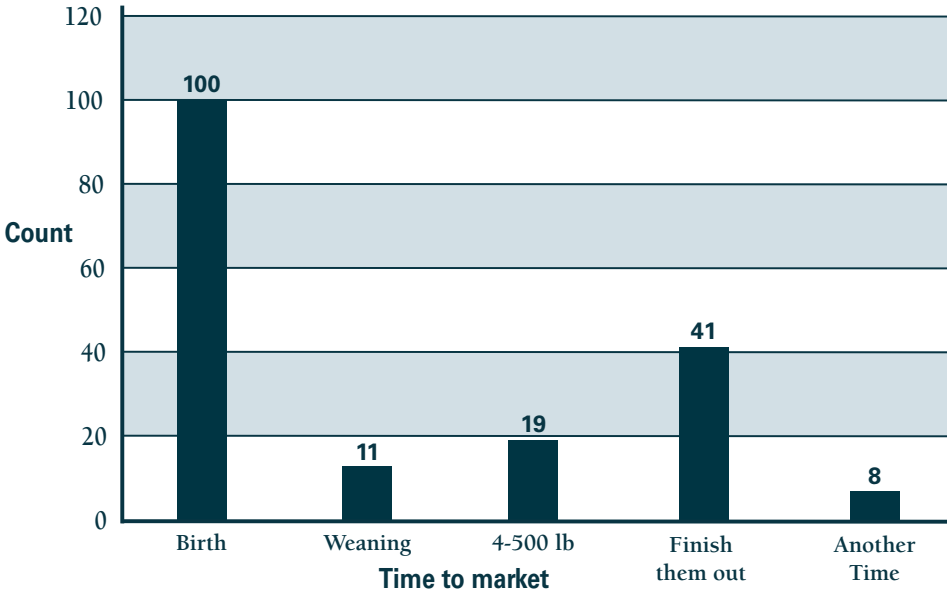


Table 9. Dairy management practices/technologies.

Management practices	Count	Percent of farms
Milk cows 3 times a day	40	17
Milk fresh cows more frequently than the rest of the herd	17	7
Haul your own milk to the processor	4	2
Use an automatic calf-feeding system	11	5
Contract feed through a co-op or supplier	87	37
Use precision farming techniques such as GIS or GPS	82	34

Management Practices

Respondents were asked to indicate whether they did or did not use strategies from a list of management practices. These are reported in **Table 9**. From the provided list, the most common were "contract feed through a co-op or supplier" at 37% (n = 87 indicated "yes") and "use precision farming technologies such as GIS or GPS" at 34% (n = 82 indicated "yes"). These are both up slightly from 2020, when 32% of respondents indicated that they contract feed through a co-op or supplier, and 26% indicated that they use precision farming techniques such as GIS or GPS. The number of farms milking cows three times daily was not meaningfully different from 2020, when 16% indicated that they milk three times daily, compared to 17% in the current survey. Additionally, milking fresh cows more frequently than the rest of the herd was unchanged at 7%. In the current year, 5% indicated they feed calves through an automated system compared to 7% in 2020. Four farms indicated that they haul milk to a processor in the current survey, compared to two farms in 2020, but these four farms are a smaller percentage of respondents. Overall, the changes in these management practices between 2020 and 2024 do not indicate dramatic shifts.



Risk Management and Marketing

Respondents were asked if they use any risk management tools. Of the 231 responses to this question, 53% indicated "yes." The most commonly used tool was Dairy Margin Coverage (DMC), with 112 responses, followed by Dairy Gross Revenue Protection with 42 responses. Twenty-two individuals indicated that they use milk contracts, and nine indicated they use Livestock Gross Margin for Dairy Cattle (LGM). Respondents could select more than one option for these tools. Only two people selected "Other."

Changes to Federal Milk Marketing Orders were announced in 2024 and implemented in 2025. Respondents were asked if they believe the revisions would be a benefit to dairy producers. Sixty percent of respondents indicated they did not believe the revisions would be a benefit to dairy producers (n = 150 total respondents).

One hundred fifty-five respondents indicated that they market their milk through a dairy farmer cooperative. Sixty-five individuals indicated that they market through an independent processor, and 24 said that they market through an organic dairy cooperative, or about 10% of respondents.
Six individuals reported that they perform their own on-farm processing and marketing. Respondents could select more than one method of milk marketing.

Services and Veterinary

Respondents were asked to answer the question "Who does the following services?" They were given nine options for services, and for each, they could select whether they were performed by a licensed veterinarian, the herd owner, on-farm employees, or a non-veterinarian off-farm contractor. Respondents could select all that apply, and results are presented in **Table 10**.

Table 10. Responses to the question "Who does the following services? (Select all that apply)"

Type of service	Licensed veterinarian	Herd owner	On-farm employees	Non-veterinarian contract (off-farm)
Care for sick animals	131	214	63	0
Emergency care	190	139	30	0
Herd health	178	115	27	1
Employee training	11	155	25	3
Herd advisory	50	130	12	57
Nutrition assistance	12	68	10	170
Embryo transfer	29	11	1	30
Hoof trimming	10	52	13	161
Euthanasia	52	178	24	5

Care of sick animals was most commonly performed by the herd owner (n = 214), followed by a licensed veterinarian (n = 131). Emergency care and herd health were most commonly performed by a veterinarian (n = 190 and 178, respectively), followed by the herd owner (n = 139 and 115, respectively). Employee training and herd advisory were most commonly performed by the herd owner (n = 155 and 130, respectively). The second-most common response for employee training was on-farm employees (n = 25), and the second-most common response for herd advisory was a veterinarian (n = 50). The most common response for nutrition assistance was a non-veterinarian off-farm contract (n = 170), followed by the herd owner (n = 68). Only 71 respondents reported embryo transfer for this question, with 30 of these using a non-veterinarian off-farm contract and 29 using a licensed veterinarian. Hoof trimming was most commonly performed by a non-veterinarian off-farm contract (n = 161), followed by the herd owner (n = 52). Euthanasia was predominantly performed by the herd owner (n = 178), followed by a licensed veterinarian (n = 52).

Custom Field Operations

When asked if they provided any custom field operations in the previous year to other farmers, 23% indicated "yes" (n = 55 respondents). Common custom services provided include hay operations, planting, chopping, harvesting, or combining (**Table 11**). Other common services provided included spraying and manure handling. This is similar to 2020, when 23% of respondents indicated they provided custom field operations to farmers.

When asked which custom field operations they utilized, the most common response was fertilizer application (n = 100), followed by corn silage chopping (n = 93) and hay baling (n = 91).

Crop and Land Management

Acreage data was analyzed among respondents who reported operating at least some owned or rented farmland (n = 235 respondents). Averages for owned and rented acres were calculated among those who reported a value for each respective variable. Acreage is reported in **Table 12**.

Employees and Labor

One hundred eighteen respondents completed the question "What are the biggest challenges you face when trying to keep a qualified employee?" Common themes included compensation, work schedule, finding workers, turnover as young workers move on to other careers, and reliability of available labor. Approximately 30% of respondents who answered the question indicated they did not utilize hired labor.

Table 12. Reported acreage used by crop or product.

Product/crop	Average acres	Responses
Total owned	337.6	234
Total rented	300.3	234
Corn grain	159.6	209
Corn silage	338.1	219
Hay or haylage	100.5	213
Small grains	25.1	137
Soybeans	97.7	159
Cover crops	113.1	153
Cover crops for forage	42.6	136
Productive pasture	33.0	163
Other	17.7	67

Table 11. Responses to "Last year, did you provide any custom field operations to other farmers?"

Field operation	*n*	Percent of responses
Hay Operations, including wrapping	22	29%
Chopping/harvesting/combining	24	31 %
Planting	15	15 %
Other	16	21 %

When asked how many hours per week respondents work on the farm on average, two respondents indicated "every day" or "full time" without providing the number of hours. Six respondents indicated they worked "24/7." One person was removed because their hours reported were mathematically impossible. A midpoint was coded for respondents who provided a range of hours worked. Of the remaining respondents (n = 207), reported hours/week ranged from 8 to 125 hours (**Figure 5**). The average number of hours worked was 76 hours/week, and the median was 80 hours/week. In 2020, the average reported hours worked per week was 66 hours.

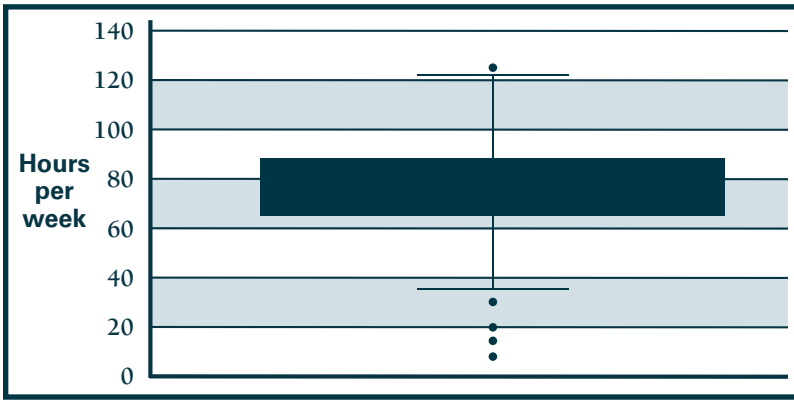


Figure 5. Average hours worked per week reported by respondents.

Respondents were asked how many employees and family members worked on their dairy farms in 2023, as well as the average number of hours worked per week per person (**Tables 13A and 13B**). One respondent was removed from the number of family members working full-time due to being an extreme outlier. Two responses were excluded from family member hours worked because of mathematically impossible working hours. For family member hours, one respondent indicated they work "full time" or "every day" without indicating the number of hours worked, and one respondent indicated that they work "24/7." It does appear that there were some errors, and it was likely that the questions were misunderstood by some respondents.

Table 13A. Number of family member employees and their reported hours, working on the farm.

	Full time		Part time	
	Number of workers	Hours reported	Number of workers	Hours reported
n	166.0	141.0	149.0	130.0
Average	2.3	61.3	1.9	22.4
Median	2.0	60.0	2.0	20.0
Maximum	13.0	126.0	5.0	115.0
Minimum	1.0	4.0	1.0	1.0

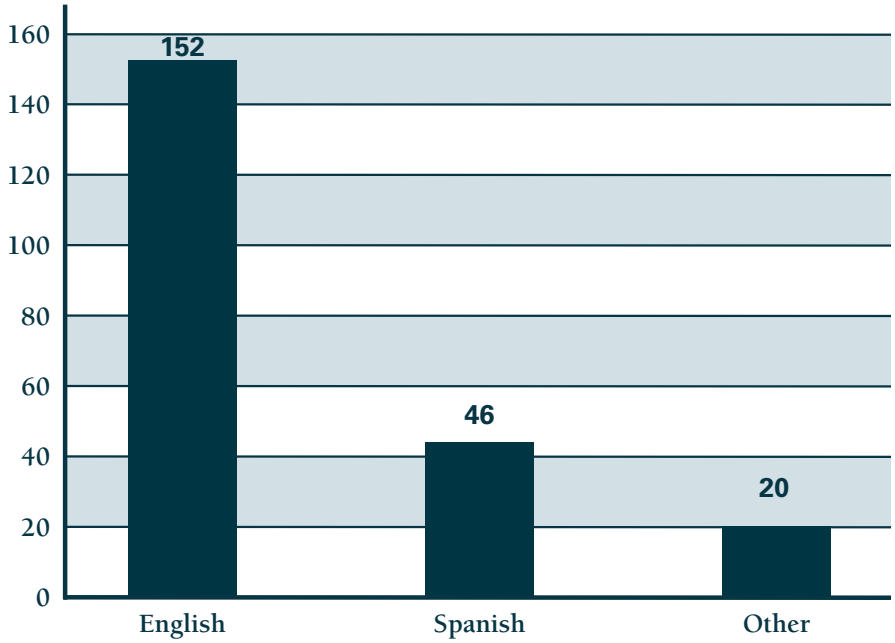
Table 13B. Number of non-family member employees and their reported hours, working on the farm.

	Full time		Part time	
	Number of workers	Hours reported	Number of workers	Hours reported
n	56.0	52.0	79.0	71.0
Average	7.5	53.8	2.9	20.4
Median	3.0	51.0	2.0	16.0
Maximum	56.0	90.0	14.0	110.0
Minimum	1.0	20.0	1.0	3.0

For example, the minimum average hours worked per week reported for full-time family members was reported as "four," which is not full-time. Similarly, the maximum number of hours worked on average per week for part-time family members was "115," which is not part-time. Despite these outliers, average and median hours worked per week for both full-time and part-time family members was similar. The median number of hours worked by full-time family members was 60 hours/week, and for part-time family members, it was 20 hours/week. Only 56 respondents reported hiring non-family employees full-time, and 79 reported using part-time employees. Of the 79 that hired part-time employees, 30 of these also had full-time hired labor.

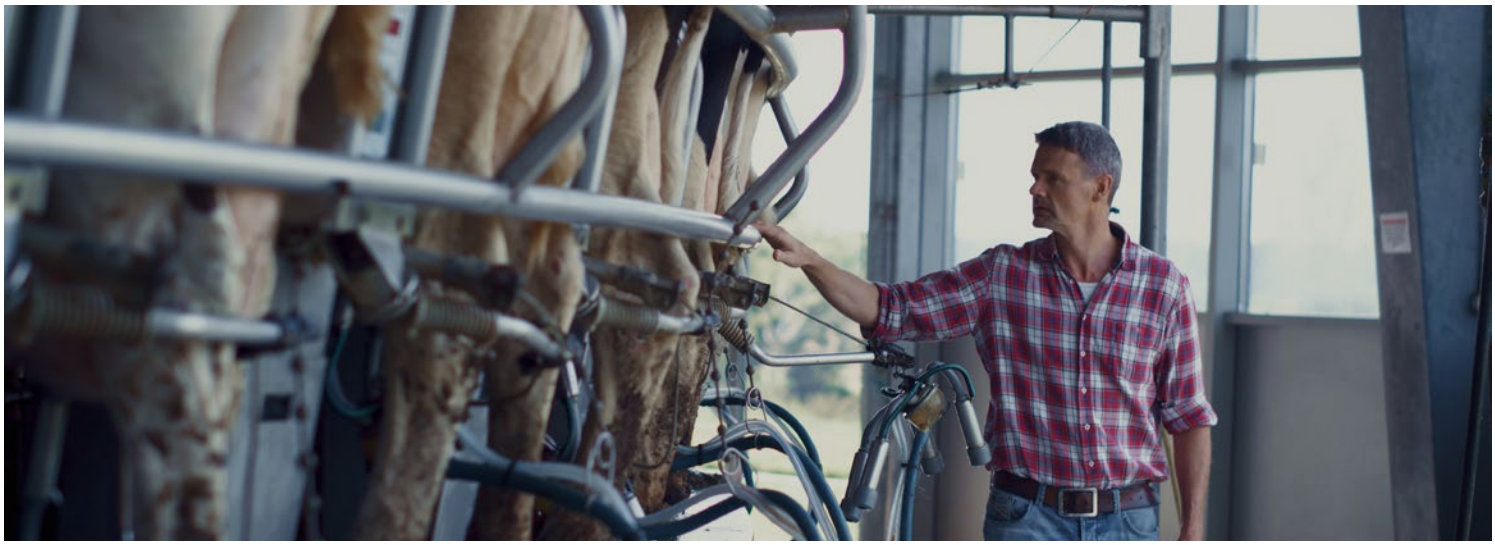
The reported native language of employees was predominantly English in this data set (**Figure 6**), with 152 respondents reporting English-speaking employees and 46 reporting Spanish-speaking employees. Most of these (n = 37) had both English- and Spanish-speaking employees.

Figure 6. Number of farms reporting their employees speak English, Spanish, or "other."



Twenty respondents reported "other" for the language spoken by their employees; the most common other language reported was Pennsylvania Dutch (n = 10). There is a distinctive difference in herd size between these groups. The average herd size for respondents who reported English-speaking employees was 328 cows, while the average herd size for respondents who reported Spanish-speaking employees was 992 cows. Herds that indicated "other" for the native language of their employees averaged 58 cows.

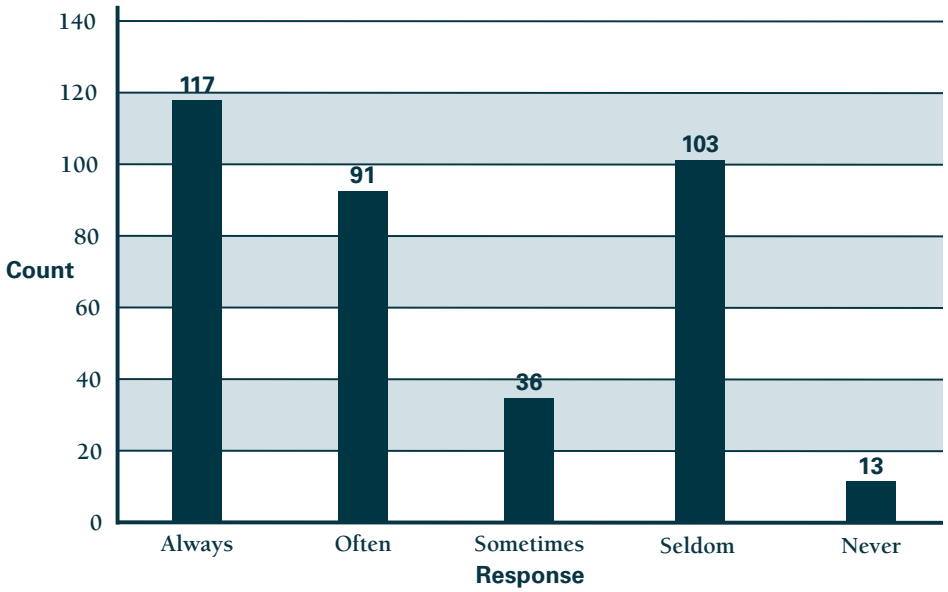




The question "How often do you communicate with your non-English speaking employees in their native language?" was answered by 102 respondents; however, 40 of these respondents indicated they only had English-speaking employees. Therefore, these responses were removed. Of the remaining 62 responses, there was very little agreement on how often they spoke to their employees in their native language, ranging from 18% reporting "seldom" to 23% reporting "often" (**Figure 7**).

Only 17% of respondents indicated having an employee handbook with written protocols beyond what is required for the FARM program (n = 202). Again, this seems to be driven largely by herd size, as respondents who indicated "yes" had an average of 790 cows compared to 215 cows for respondents who did not provide an employee handbook. Of these, 53% reported that their handbook is updated yearly, while 18% and 29% reported that they update it more than once a year or less than once a year, respectively. No respondents indicated that they never update the employee handbook. Thirty-three respondents indicated their handbook is available in English, and 13 indicated it was available in Spanish. Respondents could select all that apply, and 12 respondents indicated they have a handbook available in both English and Spanish.

Figure 7. Responses to "How often do you communicate with your non-English speaking employees in their native language?"



When asked whether respondents had regularly scheduled employee training, the trends were similar. Seventeen percent of respondents indicated that they had regularly scheduled employee training (n = 187 respondents), with the average herd size of respondents who have employee training being 1,090 cows compared to an average of 183 cows for herds who do not have regularly scheduled training. Of the herds that offered employee training, 39% indicated that they have training semi-annually, while 29% indicated that they have it monthly, and another 29% indicated that they hold it annually. Twenty-four respondents indicated they have training in English, and 17 indicated they have training in Spanish. Respondents could select more than one option for language, and 10 respondents indicated they offer training in both English and Spanish.

Iowa dairy farmers are working longer hours (76 hours/week, up from 66 in 2020), with a labor situation characterized by difficulty finding and retaining employees, inability to pay competitive wages, and heavy reliance on family labor. Nearly one-third of operations that responded to this survey use no hired labor at all, likely a result of a respondent skew towards smaller operations. For those who do hire, formalized employee management practices (handbooks, training) are more common in larger operations.

Industry Attitudes

Respondents were asked to what degree they agreed with a series of statements regarding the current dairy industry,

The Statements asked were:

A. **A revised visa policy would make it easier to find Farm laborers.**

B. **The national immigration policy should be changes to allow a pathway for citizenship.**

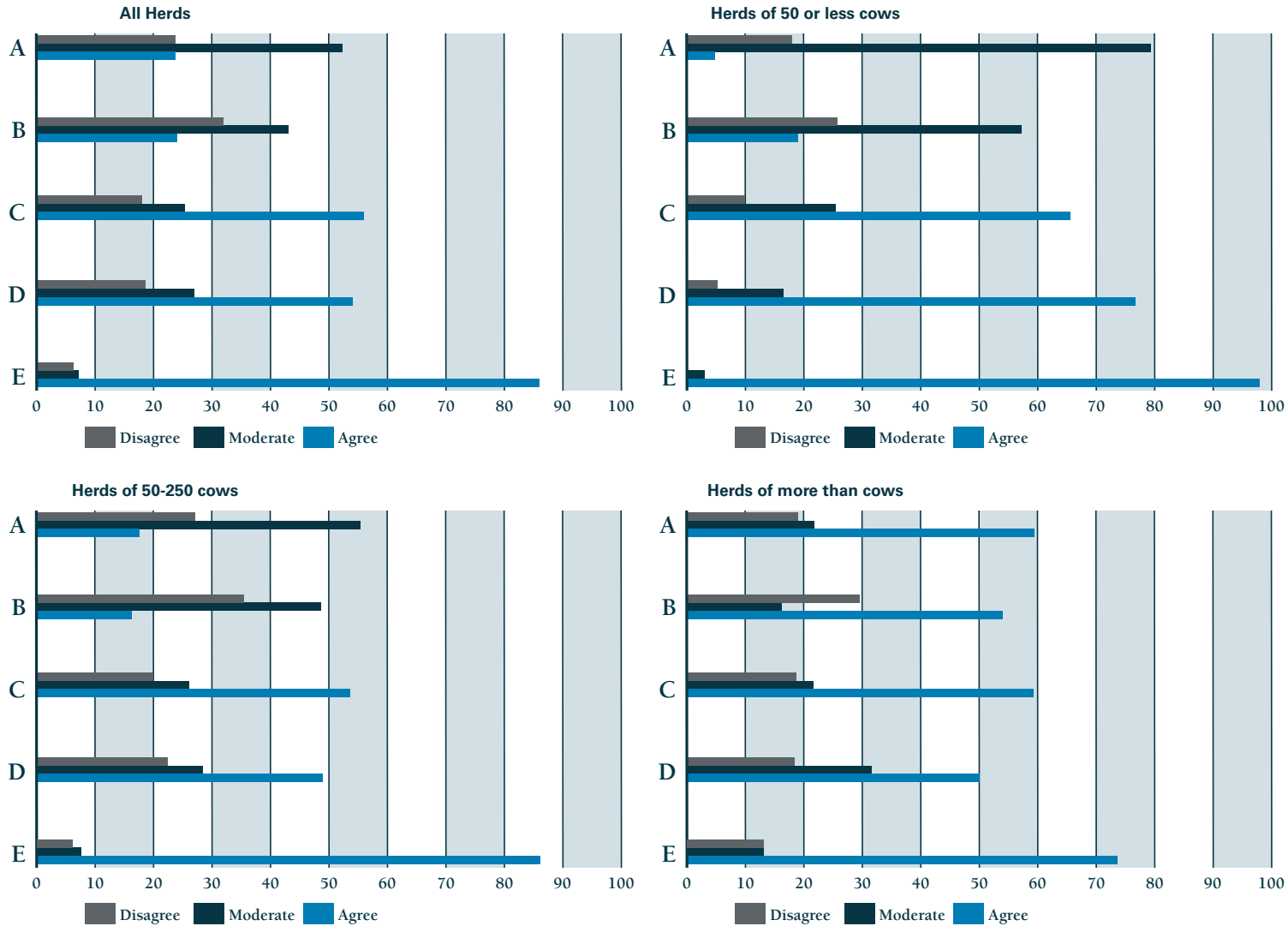
C. **My farm is financially stable enough to support the next generation.**

D. **I would encourage the next generation of my family to become dairy farmers.**

E. **Family-operated dairy farms are essential to the future of rural Iowa.**

Across all herd sizes, the majority of respondents agreed or strongly agreed with the statement that "family-operated dairy farms are essential to the future of rural Iowa" (n = 195, 86% of respondents). However, only about half of respondents (54%) agreed or strongly agreed that "I would encourage the next generation of my family to become dairy farmers" (n = 124), and 56% agreed or strongly agreed that "my farm is financially stable enough to support the next generation" (n = 129). There were differences in the response to this question by farm size. For herds milking fewer than 50 cows, 97% agreed that family-operated dairies are essential to the future of rural Iowa (n = 35), while 86% (n = 126) of those with herds between 50-250 and 74% (n = 28) of herds over 250 cows agreed with this statement. Additionally, those with herds milking fewer than 50 cows were more likely to encourage the next generation of their family to become dairy farmers at 78% of respondents (n = 29), while only about half of those with herds from 50-250 or over 250 cows agreed (49% and 50%, respectively). (**Figure 8**).

Figure 8. Percent of respondents who agreed or disagreed with statements regarding the current dairy industry, overall and by herd size.



Regarding visa and immigration policy, respondents were even further split according to farm size. When asked their level of agreement with the statement "the national immigration policy should be changed to allow a pathway for citizenship," 43% of respondents across all farms were neutral (n = 89), while 24% either agreed or strongly agreed (n = 50) and 32% either disagreed or strongly disagreed (n = 66). However, 19% of those with herds under 50 cows (n = 6) and 16% of herds from 50-250 cows (n = 21) agreed with this statement, compared to 54% of herds over 250 cows (n = 20). When asked whether they agreed with the statement "a revised visa policy would make it easier to find farm laborers," about half of all farms (52%; n = 103) were neutral, while those who agreed and disagreed were evenly split at 24% (n = 47). When analyzed by farm size, the majority of those with herds with less than 50 cows were neutral at 79% (n = 23), while 17% disagreed (n = 5) and only one person agreed. For those from herds with 50-250 cows, 55% were neutral (n = 69), while 18% agreed (n = 22) and 27% disagreed (n = 34). However, for those with herds over 250 cows, 59% agreed that a revised visa policy would make it easier to find farm laborers (n = 22), while 22% were neutral (n = 8) and 19% disagreed (n = 7).

There are a few notable differences from the 2020 survey. The proportion of dairies with more than 250 cows who agreed with the statement that "the national immigration policy should be changed to allow a pathway for citizenship" was less than 10% in 2020, compared to 54% in 2024, and the proportion of dairies this size that agreed with the statement that "a revised visa policy would make it easier to find farm laborers" nearly doubled.

Respondents answered questions pertaining to the impact of current issues on their farm business. Milk price volatility was identified as a high-impact issue for dairy producers and their farm business, with 185 respondents (80%) indicating that it had a very great impact. Other top impact issues included commodity prices and milk hauling costs (n = 105 responses each indicating "very great impact").

This is consistent with the 2020 survey, when producers indicated that milk price volatility and commodity prices were high-impact issues. Producer price differentials were listed as a third high-impact area in 2020. In 2024, 76 respondents listed this as having a very great impact and 58 respondents listed it as having a great impact. Highly pathogenic avian influenza (HPAI) was listed as an option in the 2024 survey, but not the 2020 survey. Producers indicated that this did not have a great impact on their farm business, with 123 respondents (54%) indicating that HPAI had no impact on their business. Immigration policies were also listed as an area with no impact on the business (n = 126), consistent with 2020. Both of these areas may be skewed because of the high proportion of small dairies that completed the survey. As in 2020, somatic cell count limits were also an area with limited impact (n = 81 responses indicating "no impact"). Milk base limits were listed as an area of low impact in 2020, but in 2024, producers were more evenly split between no or low impact (n = 90) and great or very great impact (n = 85).



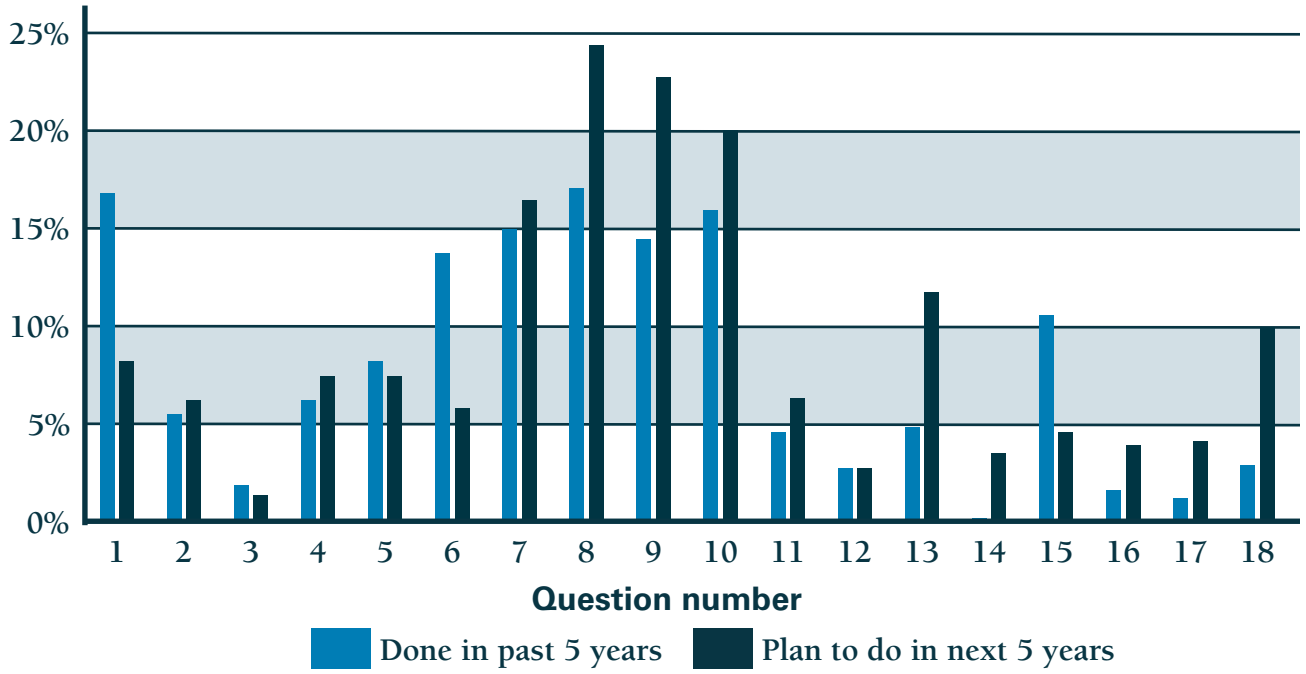
Future Plans and Updates

Respondents were asked to select from a list of 18 potential updates and indicate whether they had made these changes in the past years, whether they planned to in the next five years, or neither of these. They also had the option to select "Do something else," and indicate the change they would make. Of the 13 people who selected that they might do something else in the next five years, six of them indicated that they may exit the industry or retire.

The 18 options that producers could select are shown in Figure 9 and listed as follows:

1. Build or retrofit milking facility
2. Install robotic milking system
3. Install TRANS Iowa low-cost milking parlor
4. Add automation to existing milking system
5. Update or add milk meters
6. Update or add RFID for cow identification
7. Update dairy housing facility
8. Update heifer facilities
9. Upgrade transition/dry cow facilities
10. Upgrade feed storage
11. Implement feed management software
12. Install automatic calf feeders
13. Build new calf barn for group housing
14. Install a methane digester
15. Bring visitors to your dairy farm with agritourism
16. Begin or increase on farm milk bottling
17. Sell branded beef through retail markets
18. Do something else

Figure 9. Percent of respondents who will be making a change in the next five years or have made a change in the past five years, as selected from a list of options.



The most commonly selected update was "update heifer facilities," with 40% of respondents indicating that they either had updated in the past five years or would update in the next five years. Seventeen percent indicated they had updated their heifer facilities, consistent with 2020 responses, when 21% indicated that they planned to update their heifer facilities. Thirty-seven percent and 36% indicated that they either had or would update their transition cow facilities or their feed storage, respectively. Again, this is consistent with 2020 responses. That year, 23% indicated they would update their transition cow facilities within the next 10 years, and 21% indicated that they would update their feed storage in the next 10 years. The least commonly selected item in 2024 was "install a methane digester," with no one indicating they had installed one in the past five years and 3% indicating they may install one in the next five years.

Beginning Farmer Programs

Respondents were asked about their support of a variety of strategies to support beginning farmers (**Figure 10**).

The six questions asked were:

1. Would you consider leasing your dairy facilities or cows to a beginning dairy producer?
2. Would you consider selling your dairy facilities or cows to a beginning dairy producer?
3. Would you consider becoming a mentor or partner with a beginning dairy producer?
4. Should low-cost loans be made available to beginning dairy producers?
5. Should monetary support be provided to mentors or partners who are working with beginning dairy producers?
6. Should more educational meetings designed for beginning dairy producers be made available?

Popular strategies for supporting beginning farmers included low-cost loans for beginning farmers (n = 154) and monetary support for mentors or partners who are working with beginning farmers (n = 96).

Exit Strategies

Respondents were asked to select from a series of six options and whether they planned to do them in the next five years, 5-10 years, or not within the next 10 years (**Figure 11**).

The six options were:

1. Discontinue milking but continue farming
2. Discontinue milking and rent out the land
3. Sell the dairy operation as a dairy business
4. Retire and get out of farming altogether
5. Transfer ownership of your dairy business to a family member
6. Will you do anything else

Figure 10. Responses to a question asking about options for beginning farmers.

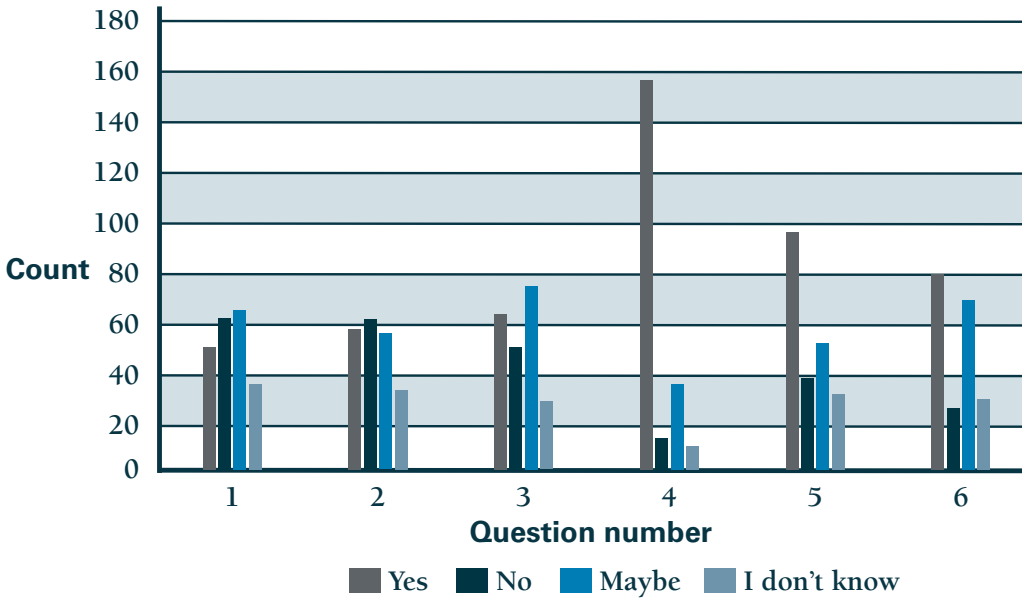
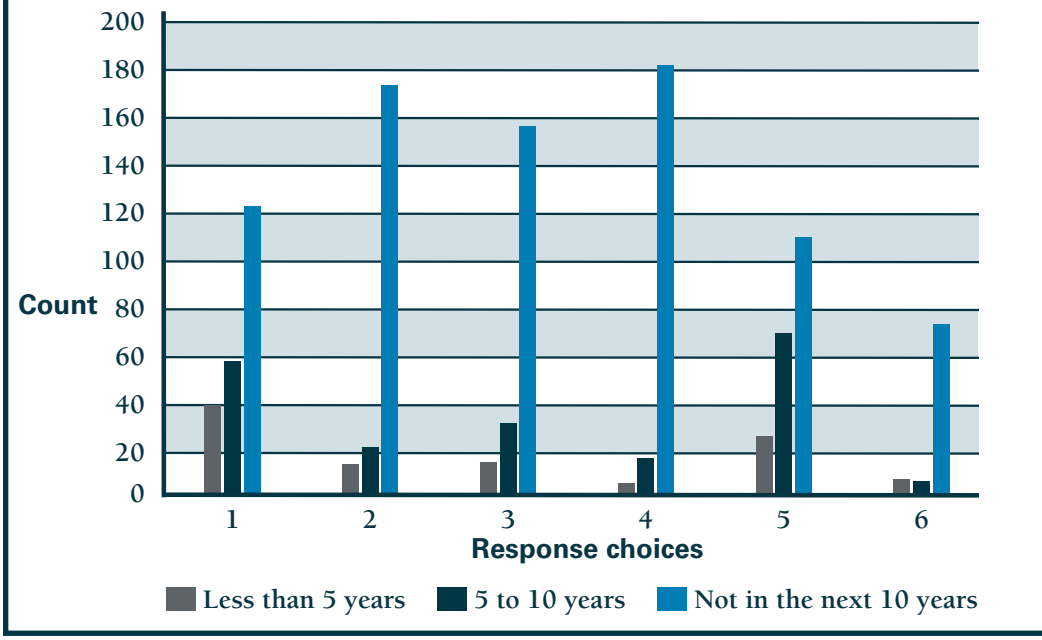
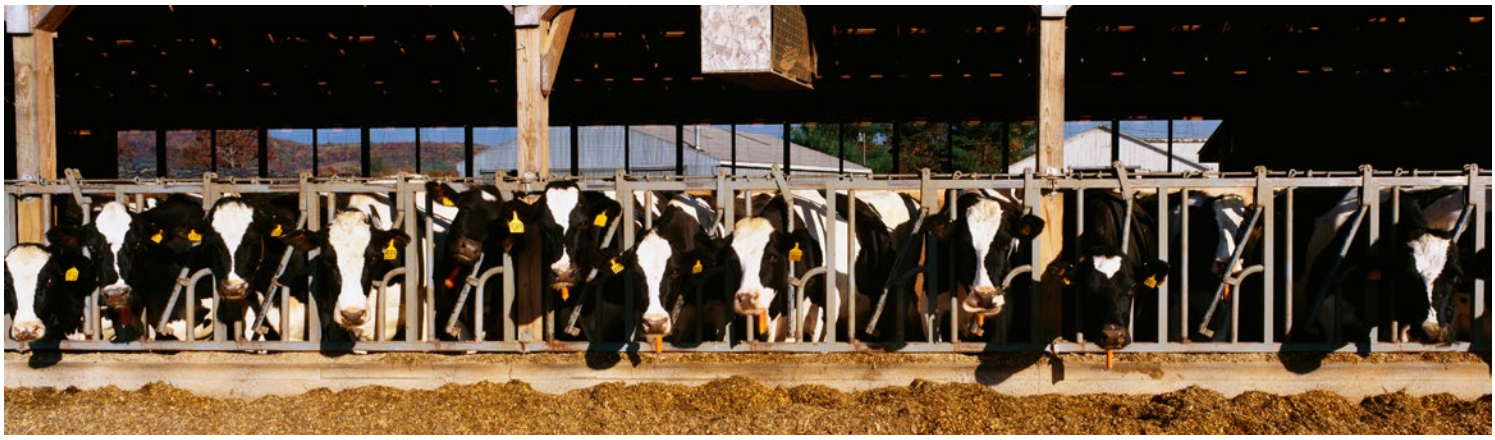


Figure 11. Responses to "Do you expect to make any of the following changes?" Respondents were allowed to select whether they would make the change in less than five years, in 5-10 years, or not within the next 10 years.



A total of 60.5% of respondents indicated they would discontinue milking in the next five or 10 years, with 44.5% indicating they would discontinue milking but continue farming, and 15.9% indicating they would discontinue milking and rent the land out. Within the next five or 10 years, 47.6% of respondents indicated they would transfer ownership of their family business to a family member. For those who indicated they would discontinue milking but continue farming, the most common response to what they would raise was crops (n = 69), followed by beef (n = 60). Others indicated they would custom-raise heifers (n = 14) or raise other livestock (n = 15).

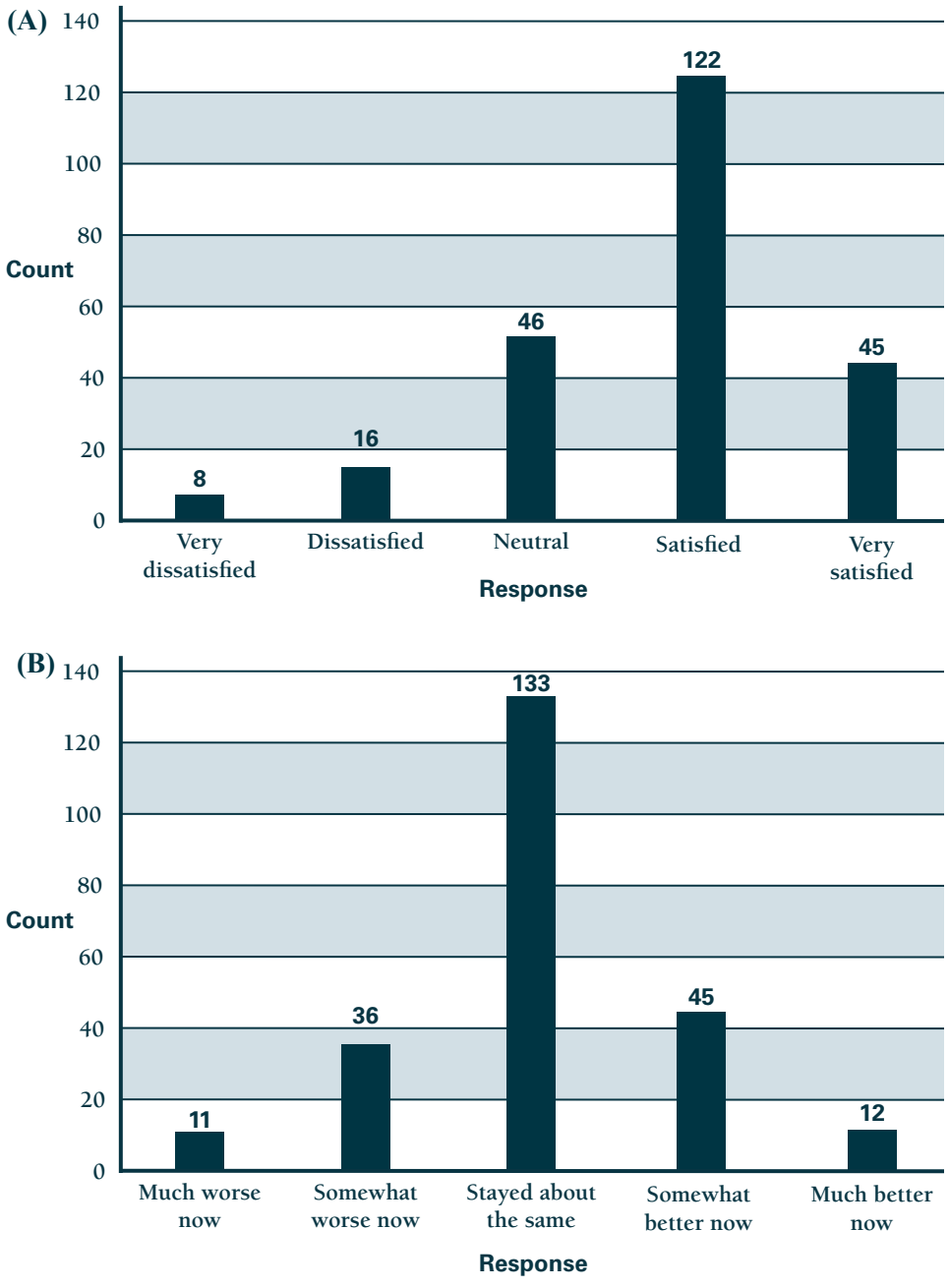


Quality of Life and Mental Health

Respondents overwhelmingly reported that they were satisfied or very satisfied with their quality of life, with 51% reporting that they were satisfied with their family's current quality of life and 19% reporting that they were very satisfied (n = 237 responses; **Figure 12**). Thus, in 2024, 70% of respondents indicated that they were satisfied or very satisfied with their quality of life, compared to 60% in 2020. Most respondents indicated their family's quality of life had stayed about the same during the past five years (56%), with 19% reporting that it had improved somewhat and 5% indicating that it was much improved. Fifteen percent and 5% reported that their family's quality of life was somewhat worse or much worse, respectively. In 2020, 19% reported that their quality of life had improved, and 23% reported that it was somewhat worse.

Fifty percent of respondents indicated they had seen indications of high personal stress in the farmers in their area or had experienced it themselves (n = 225 respondents). Of those who indicated they had seen signs of high personal stress, 28% indicated there had been an instance that had prompted them to take some action or intervention. While the proportion of respondents who reported seeing or experiencing high levels of personal stress was similar to 2020 (54% in 2020), the proportion of respondents who reported acting or intervening doubled from 14% in 2020 to 28% in 2024.

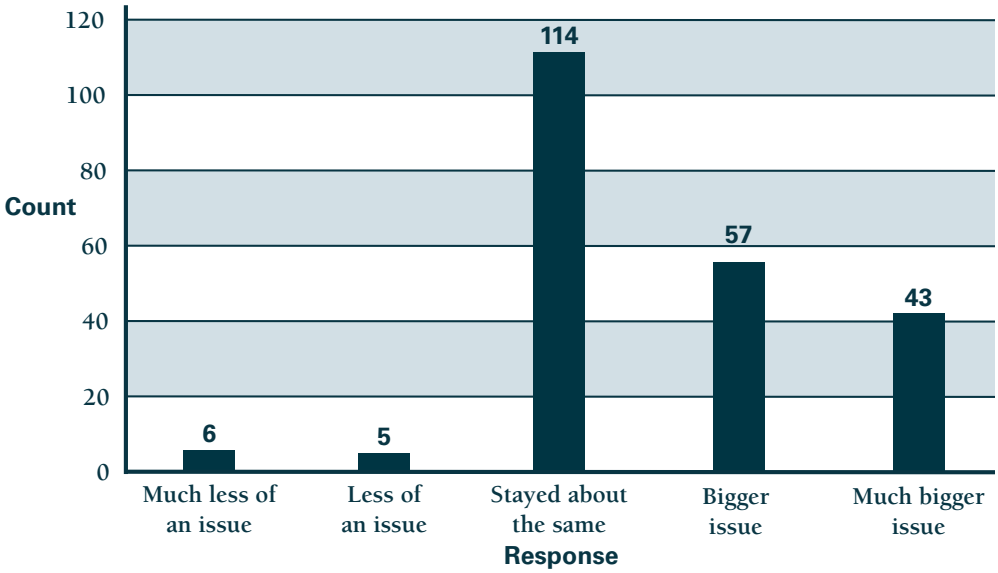
Figure 12. Respondent rating of current satisfaction with their quality of life (A) and self-reported change in quality of life during the past five years (B).



Respondents were asked to respond to the question, "How much of an issue has farmers' mental health become in the past five years?" About half (51%) responded that it had stayed about the same, while 44% indicated that it had become a bigger or much bigger issue (n = 225 respondents; **Figure 13**).

Overall, despite 50% indicating that they had seen evidence of high personal stress in others or themselves, only 10% were dissatisfied or very dissatisfied with their quality of life. A growing proportion indicated that they were prompted to intervene when they saw evidence of high personal stress in others or themselves.

Figure 13. Responses to the question "How much of an issue has farmers' mental health become in the past five years?



Summary

The most dramatic change documented in this survey is the widespread adoption of beef-on-dairy programs. Two-thirds of responding herds now use beef semen, up from half in 2020, reflecting a fundamental shift in how Iowa dairy producers manage calf value and herd genetics. Adoption of other reproductive and management technologies also increased, suggesting a gradual but ongoing modernization of the industry even as structural challenges persist.

Financial volatility continues to define the operating environment for Iowa dairy producers. Milk price volatility, commodity costs, and hauling expenses are the top-rated impacts on farm businesses, and a majority of producers do not view recent federal milk marketing policy changes as favorable. Over half of producers use risk management tools, but significant price uncertainty remains a persistent feature of the industry.

Workforce and labor challenges have intensified. Operators are working longer hours than in 2020, and the difficulty of finding, retaining, and adequately compensating qualified employees was a prominent theme in open-ended responses. The relationship between herd size and workforce complexity is clear: larger operations are more likely to employ non-English-speaking workers, maintain formal HR infrastructure, and report that immigration and visa policy affects their business. Smaller operations rely almost entirely on family labor and have minimal formal employment practices.

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