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# 2013 Annual Review

Global Dairy Platform



GLOBAL DAIRY PLATFORM



Our continued success depends on **constant challenge** and input from our members, seeking new opportunities and focus.

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## **From the Executive Director**

Global Dairy Platform's mission statement is "to align and support the dairy industry to promote sustainable dairy nutrition." To deliver on this ambitious ideal, GDP focuses on fostering global collaboration and bringing together the collective thoughts of our membership. This report shares some of the many things GDP and its workgroups are doing to ensure that key influencers - health professionals, regulators, policymakers and world bodies - understand the vital role dairy plays in diets around the world.

Since its emergence eight years ago, GDP has remained focused on its goals and has logged some notable achievements along the way. However, the core challenge remains clear: stay close to the rapidly evolving edge of opportunity. GDP, and the dairy sector, cannot be frozen in time. Even as the WHOLE story of dairy is coming to life, the sector must actively work on shaping its future, lest someone else does it for us.

Over the past year, GDP has been laying the groundwork for where the sector is going, the opportunities it will own and the value it creates. For example, GDP formed a Communications Collaborative to keep sector communicators in tune with opportunities to share and create common resources. This is core to the sector moving from telling its story to owning its story.

Likewise, GDP's leadership within the Global Dairy Agenda for Action in creating a Dairy Sustainability Framework (DSF) emphasizes the belief that long-range goals are fueled by today's decisions and actions. As such, the DSF serves as a strategic guide for setting an international leadership position to communicate the sector's ongoing progress.

GDP's base continues to be science and research on how dairy's naturally nutrient-rich composition has a positive impact on health, development and performance. The perception of dairy overall is becoming a more balanced one. There are, however, key challenges to overcome and benefits to clarify as dairy seeks to become more involved in the global nutrition agenda.

On a final note, Sarah Kennedy, Managing Director of Fonterra Nutrition, retired as a GDP board member in 2013, and Jacqueline Chow, Managing Director of Global Brands and Nutrition for Fonterra, joined the board. As always, we thank our members and our governance groups for their support and continuing involvement as we move forward in service of GDP's vital mission.

A handwritten signature in black ink that reads "Donald Moore". The signature is written in a cursive, slightly slanted style.

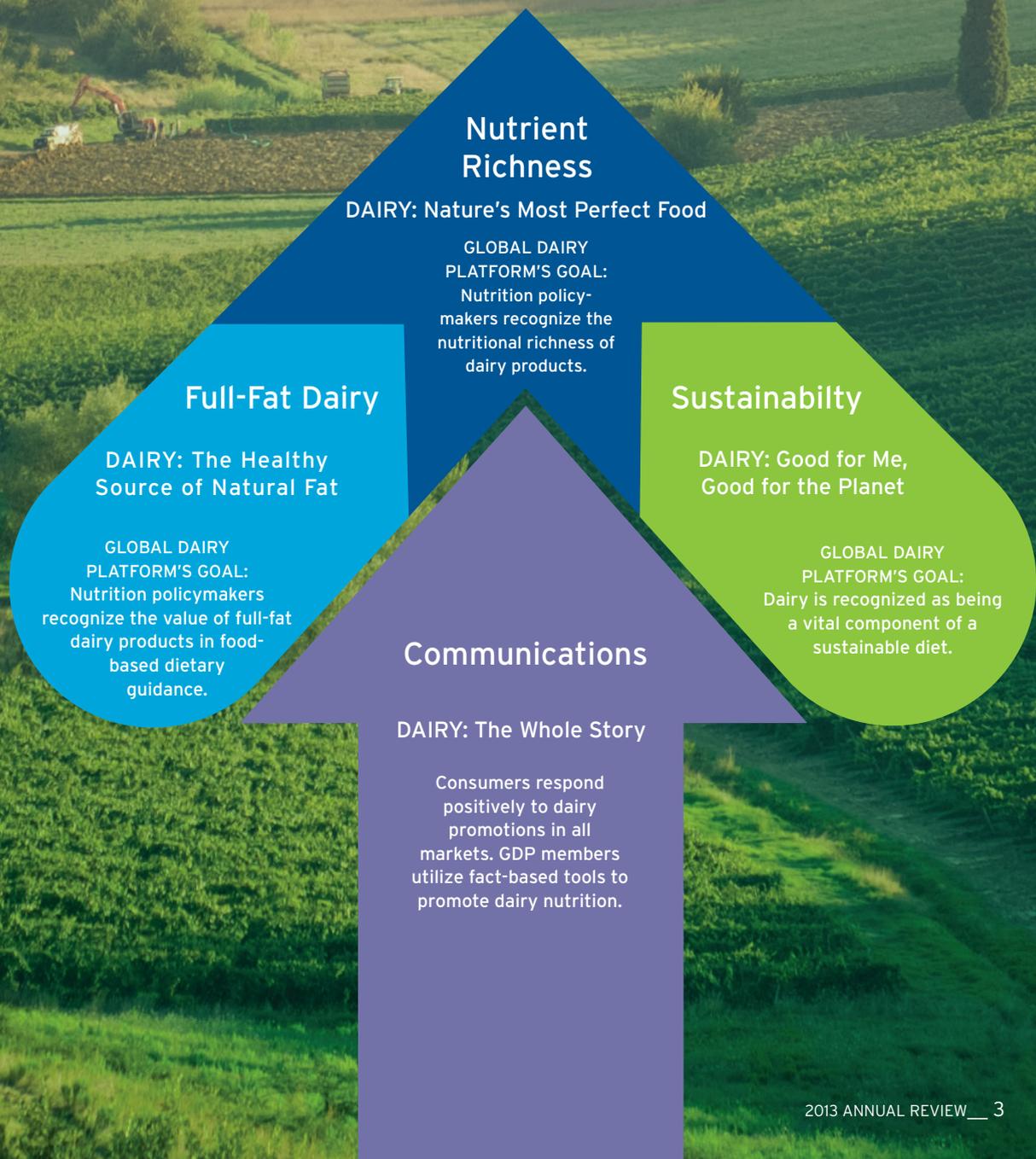
Donald Moore, Executive Director

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**Our Vision:** Consumers value milk and dairy products as naturally nutritious, enjoyable and an essential part of a healthy diet.

**Our Mission:** To align and support the dairy industry to promote sustainable dairy nutrition.

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GDP's role isn't just to facilitate specific work programs; it is to **work collaboratively** with a variety of organizations to strengthen the dairy sector.

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As global leaders consider the many diverse issues surrounding the **development of sustainable diets**, it is crucial to show dairy as a nutritious food that is produced efficiently and sustainably.

## Resource Efficient Nutrition

The global challenges of nutritional security, sustainability and chronic disease continue to shape the 21st century. Studies are increasingly linking many of today's chronic non-communicable diseases - cardiovascular disease, chronic respiratory diseases, cancers, diabetes - to overconsumption and poor dietary choices. Discussions, forums and whitepapers abound on how to achieve sustainable food systems and reduce environmental footprints, but many lack sufficient data or research to support the validity or practicality of any recommendations.

The challenge of how to feed a projected 9.6 billion people in 2050 is not just about affordable caloric intake but also diet quality. It is crucial then for key influencers to understand how dairy's nutrient-rich package provides not just basic nutrition, but better nutrition - and how better nutrition means a healthier population.

An emerging global driver is a proposed change to the way in which protein quality is measured. It is likely that the 21st century will see new dietary guidance for protein based on optimal, rather than minimal, requirements. This provides an opportunity to demonstrate dairy's versatility as a quality protein source and as a complement to other food staples. Creating a collective position and common language to educate policymakers and others will



be key to building understanding of dairy's role in a diverse and balanced diet.

Similarly, providing clarity on how dairy manages its relationship with the environment is critical to it being viewed as a valued contributor to sustainable diets. The “sustainability of dairy” is interpreted in many different ways by different groups - with many perceiving dairy foods as having a disproportionate impact on the environment.

With the 2013 launch of the Dairy Sustainability Framework, organizations are now being encouraged to endorse the framework and add their activities to the catalog of global dairy sustainability activities. This process will ensure that dairy is communicating its strong history of principles and tools to improve sustainability in a way that provides a robust response to the challenges the dairy sector faces globally.

## Resource Efficient Nutrition Highlights

### Include:

#### **Dairy Sustainability Framework**

Led by the Global Dairy Agenda for Action, the Dairy Sustainability Framework (DSF) is a program for aligning and connecting sustainability initiatives to demonstrate leadership and progress. The DSF contains a sustainability vision and a series of eleven overarching sustainability issues, along with a catalog of current initiatives placed within a continuous improvement spectrum. The framework provides the sector and third parties (NGOs, retailers, etc.) confidence, reliability and comparability in understanding sustainability within the dairy sector.

#### **Collaborative Research**

GDP serves as the secretariat to the Dairy Research Consortium, an alliance among six leading dairy sector associations that collaborates on pre-competitive research into the nutritional and health benefits of dairy. In October 2013, the DRC participated in a Dairy Research Institute hosted roundtable on the beneficial health outcomes related to the consumption of full-fat dairy

products to guide research that can influence dietary guidance.

#### **Cheese in Healthy Diets Studies**

GDP and other sector partners are supporting several ongoing studies to verify that cheese can be included in healthy diets. The first systematic look at the effects of fat content of cheese or its maturation on blood lipids is the focus of a series of University of Copenhagen projects through a collaboration of seven multinational funders. GDP has also initiated with other partners a Wageningen University meta-analysis of completed human clinical studies to evaluate the effects of cheese consumption on blood cholesterol levels.

#### **Dairy's Health Benefits Data**

GDP members now have access to the Dairy Research Evidence Library (DREL), a database of published studies that evaluated the effects of dairy product consumption on selected health outcomes. The DREL consists of results extracted from clinical trials and prospective cohort (observational) studies and provides a single repository of research on these outcomes. Topics completed to date showcase the body of evidence that exists for the health effects of dairy product consumption on cardiovascular disease and diabetes.

**Protein Quality** GDP has been active on several fronts with the aim of positioning dairy as a higher quality source of protein, including leading the promotion of the FAO Expert Consultation on Protein Quality findings through collaboratively developed messaging and press releases. Longer-term strategies include engaging regulatory and world bodies on making protein quality a part of nutritional policy, supporting the research required to implement the Digestible Indispensable Amino Acid Score (DIAAS) method and developing a report on the potential of DIAAS adoption for the sector.

#### **Dairy's Nutrient-Rich Package**

GDP, in collaboration with seven other dairy partners, sponsored a symposium session at the IUNS 20th International Congress of Nutrition (ICN) to highlight the beneficial health effects of nutrient-rich dairy products. The ICN presented a unique opportunity to inform global opinion leaders within the nutrition community about research indicating that diets with dairy, including whole milk and cheese, contribute to weight management, muscle maintenance and lower risk of cardiovascular disease and type 2 diabetes.



This year's work has set us on a course that **serves our membership sector** ever more effectively.

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The immediacy of the **global communication environment** is driving collaborative efforts to tell the WHOLE story of dairy in feeding the world and delivering superior nutrition sustainably.

## **The Whole Story Comes to Life**

In today's communication environment, the way customers learn about and discuss dairy products has changed drastically. No longer is the communication one-way, broadcast or somehow sent to a passive audience. For anyone wishing to promote their views about dairy - fact-based or opinion - the internet is just a click away. With new challenges to address on a daily basis, it is now more important than ever to leverage the industry's efforts to promote dairy's WHOLE Story.

Producing nutritious food efficiently, safely and sustainably, while bringing enjoyment to billions of people each day, is the heart of the WHOLE story. For both developed and developing countries, generations of responsible land stewardship provide the infrastructure and capacity to sustain and revitalize rural communities. Now and in the future, dairy's lifeforce and goodness play a key role in bringing society, sustainability and world nutrition together.

While connecting audiences to the benefits of dairy and the valuable role it plays in delivering superior nutrition sustainably is a priority, the common story the sector tells about itself will help consumers connect with dairy at an emotional level. In this sense, the GDP Communications Collaborative goal of

creating and sharing relevant and common messaging is very important. The essence of this strategy is to deliver consistent, valuable information to consumers that will build trust and engagement. That creates the basis for belief, adoption and maintained usage of dairy.

But getting the message right isn't enough. It is critical to get ahead of consumer expectations and gain an understanding of how global trends affect dairy's role in food and nutrition security. To this end, GDP and the International Milk Promotions Group are working together to develop a structured way for the sector to identify future pre-competitive opportunities and stimulate collaboration. The outcome will keep the dairy sector on the cutting edge of delivering solutions to pressing global nutritional challenges.



# Communication

## Highlights

### Include:

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#### The WHOLE Story Comes to Life

The GDP Communications Collaborative is creating structure to communicate the sector's most compelling stories and facts in a clear and consistent way. Early 2014 will see the delivery of an initial online portal that will contain support resources such as infographics, fact sheets, key messages, multimedia content and case studies.

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#### The Future of Dairy Marketing

GDP and the International Milk Promotions Group co-hosted the 4th Annual Global Dairy Marketing Conference, designed to offer a platform for the development of pre-competitive dairy marketing research and strategies. Attended by more than 45 dairy marketers, the group is now working to map future scenarios to identify collaboration opportunities.

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#### Positioning Dairy and Saturated Fat

The fourth edition of the GDP publication *Current Evidence about Dairy, Saturated Fat and Cardiovascular Disease* has been updated to reflect the most significant new evidence about the effects of dairy fat. Results consistently show that full-fat dairy products do not contribute to cardiovascular disease with emerging data suggesting reduced risk for certain chronic diseases. An additional desk-side reference tool of key messages allows dairy researchers/scientists and marketers to quickly access and present consistent data points and messaging when they are working with decision-makers.

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#### Resource Efficient Nutrition

GDP published the perspective paper, *Enhancing Nutritional Security: How Dairy Optimizes Natural Resources* to demonstrate the unique value cows add to the ecosystem. Milk production is highly efficient in terms of resource use, yet dairy foods are perceived as having a disproportionate impact on the environment. This paper explains how, as ruminants, dairy cows efficiently contribute to the food

supply by converting low-quality inputs into nutrient-rich products.

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#### Sustainable Nutrition

With the understanding of what constitutes sustainable diets continually evolving, GDP is leading an ongoing series of quarterly dairy nutrition and sustainability webinars to discuss the latest research and activities taking place within the global dairy sector aimed at linking nutrition and the many facets of sustainability. Participants also share updates on events and new publications that are building the science base.

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#### Nutrient Contribution of Whole Foods

GDP published the perspective paper, *How Global Nutrition Policy Impacts the Food Business*. The paper proposes dairy leaders encourage a focus on whole foods rather than nutrient avoidance in the decision criteria for foods and nutrition policy. It also promotes working with government, NGOs, public health and healthcare entities to advance dialogue and new thinking.

**Governance Groups** Global Dairy Platform's Board of Directors and Operational Committee provide strategic oversight of GDP's activities.

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**Peder Tuborgh**

Chairman of the GDP Board  
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Deputy Chairman of the GDP Board and  
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Senior Vice President of Strategy and  
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Managing Director,  
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President, International Dairy Federation

**Jerry Kaminski**

Executive Vice President and Chief  
Operating Officer for Global Dairy Foods,  
Land O'Lakes, Inc.

**Thierry Philardeau**

Head of Dairy Strategic Business Unit,  
Nestec Ltd.

**Frank van Ooijen**

Director of Sustainability and Corporate  
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Royal FrieslandCampina N.V.

**Communication and Scientific Advisory**

**Board** Advising GDP's leadership is the CSAB that consists of world-renowned nutritional health scientists, regulatory affairs and communication experts.

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**Professor Arne Vernon Astrup**

Head of Department, Faculty of Nutrition,  
Exercise and Sports Science, University of  
Copenhagen

**Dr. Rob Beudeker**

Vice President Innovation, Human Nutrition  
and Health, DSM Nutritional Products

**Jean-Marc Delort**

Vice President, Head of R&D, Dairy Strategic  
Business Unit, Nestec Ltd.

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Vice President of Regulatory and  
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**Professor Frans J. Kok**

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President, Dairy Research Institute

**Professor Tom AB Sanders**

Head of the Diabetes and Nutritional  
Sciences Research Division, Kings College  
London

**Jörg Seifert**

Technical Director, International Dairy  
Federation

**Global Dairy Platform  
Leadership Team**

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**Donald Moore**

Executive Director

**Dr. Cindy Schweitzer**

Technical Director

**Jerreau Beaudoin**

Communications Director

**Kathy Laning**

Office Manager

## Global Dairy Platform Members

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### Commercial Members

Arla Foods amba, Denmark  
Binggrae Co., Ltd., South Korea  
China Mengniu Dairy Company, China  
Clover Industries Ltd., South Africa  
Dairy Farmers of America, United States  
Dairylea Cooperative Inc., United States  
DMK Deutsches Milchkontor, Germany  
Dairy Partners Americas, Brazil  
Fonterra Co-operative Group Limited,  
New Zealand  
Glanbia Nutritionals, United States  
Irish Dairy Board, Ireland  
Land O' Lakes, Inc., United States  
Maryland & Virginia Milk Producers Coop,  
United States  
Megmilk Snow Brand Co., Ltd, Japan  
Meiji Company Limited, Japan  
Morinaga Milk Industry Co., Ltd, Japan  
Murray Goulburn Co-Operative Co. Limited/  
MG Nutritionals, Australia  
Nestec Ltd., Switzerland  
Royal FrieslandCampina N.V.,  
The Netherlands  
Saputo Inc., Canada  
St. Albans Cooperative Creamery Inc.,  
United States  
Swiss Valley Farms, United States  
TINE SA, Norway  
United Dairymen of Arizona, United States

### Associate Members

CoBank, United States  
NIZO food research, The Netherlands  
Royal DSM N.V, The Netherlands  
Tetra Laval International S.A., Switzerland

### Non-Profit Members

American Dairy Products Institute,  
United States  
Australian Dairy Products Federation,  
Australia  
Belgian Dairy Federation, Belgium  
British Cheese Board/Dairy UK,  
United Kingdom  
California Dairy Research Foundation,  
United States  
Dairy Australia, Australia  
Dairy Company Associations of  
New Zealand, New Zealand  
Dairy Connect, Australia  
Dairy Council of California, United States  
Dairy Council Northern Ireland,  
United Kingdom  
Dairy Farmers of Canada, Canada  
Dairy Industry Association of Australia,  
Australia  
Dairy Innovation Australia, Australia  
Dairy Management Inc., United States  
Dairy Nutrition Council, Finland  
Dairy Processors Association of Canada,  
Canada  
Dairy Research Institute, United States  
Dairy UK, United Kingdom  
DairyCo, United Kingdom  
Danish Dairy Board, Denmark  
Dutch Dairy Association, The Netherlands  
Eastern and Southern Africa Dairy  
Association, Kenya  
Embrapa Dairy Cattle, Brazil  
European Dairy Association, Belgium  
Gardiner Foundation, Australia  
International Dairy Federation, Belgium

International Dairy Foods Association,  
United States  
Irish Co-operative Organisation Society,  
Ireland  
Israel Dairy Board, Israel  
Japanese Dairy Industry Association, Japan  
Korea Dairy Committee, South Korea  
Korea Dairy Industries Association,  
South Korea  
Korean Society of Dairy Science and  
Technology, South Korea  
Milk Marketing (NSW) Pty. Ltd., Australia  
Milk Producers Organisation, South Africa  
MilkPEP, United States  
National Dairy Council, Ireland  
National Milk Producers Federation,  
United States  
Norwegian Dairy Council, Norway  
Pan-American Dairy Federation, Uruguay  
Polish Chamber of Milk, Poland  
South African Milk Processors Organisation,  
South Africa  
Swedish Dairy Association, Sweden  
Swiss Milk Producers, Switzerland  
The Dairy Council, United Kingdom  
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GLOBAL DAIRY PLATFORM leads the development of a collaborative, unified approach on common sector issues and the nurturing of innovative research so that consumers value milk and dairy products as naturally nutritious, enjoyable and an essential part of a healthy diet. Our membership of CEOs, executives and researchers from corporations, communication and scientific bodies work in partnership to align and support the dairy sector in the promotion of sustainable dairy nutrition.



**GLOBAL DAIRY PLATFORM**