



GLOBAL DAIRY PLATFORM

DAIRY. EVERYDAY. AROUND THE WORLD.

GLOBAL DAIRY PLATFORM | 2017 ANNUAL REVIEW



Global Dairy Platform's membership of dairy companies, associations, scientific bodies and other partners collaborate pre-competitively to **promote** the necessary intake of nutrient-rich dairy products, **build** evidence on dairy's role in the diet, and **show** the sector's commitment to responsible food production. Together, we aim to demonstrate dairy's contribution to **global food systems, healthy diets** and **sustainable livelihoods**.

Global Dairy Platform (GDP), throughout its eleven-year history, has led dairy's collaborative efforts to encourage the appropriate intake of nutrient-rich dairy foods and demonstrate the sector's role in sustainable agriculture. These are important goals in every country and market around the world. They are also core to meeting the needs outlined by the United Nations Agenda 2030 and its 17 Sustainable Development Goals (SDGs).

Over the last 18 months, GDP has been engaging with leaders and influencers to highlight the sector's impact on global health and development challenges. The architects of the SDGs are counting on the private sector to drive success. What is increasingly evident is that the dairy sector can answer the call with bold leadership and solutions.

First, the dairy sector has a prominent seat at the table with the right stakeholders. Dairy is an engine of inclusive economic and social development in many countries and its work inherently involves many different stakeholders from world bodies and non-governmental organizations to national governments and small villages.

Accordingly, the dairy sector looks to add its expertise, research, and perspective to the clash of ideas needed to solve these complex, global issues. It's an important role. Due to a sense of urgency for action now, there will be a desire to make quick judgments – even without supporting data. Now is the time to encourage a process that ensures policy decisions are based on well-designed, evidence-based research.

The dairy sector is a powerful driver for implementing solutions that will improve health, livelihoods, and sustainable food production. The world needs business, and specifically agricultural sectors such as dairy, to bring innovation and resources for nutritional security, as well as economic and social development.

On a final note, I want to acknowledge the leadership of Rick Smith, CEO of Dairy Farmers of America, whose term as GDP Board Chair is ending in late 2017. During his tenure GDP sharpened its focus toward the dairy sector being a leader in addressing world nutrition and health issues. This has led to increased visibility for the sector, particularly in dialogue within the United Nations and a strong foundation for incoming Chair Theo Spierings, Chief Executive Officer of Fonterra, to build on.



Donald Moore, Executive Director

Dairy. Everyday. Around the World.

The dairy sector has the unique ability to bring the essentials for a better life to individuals, families, and communities all over the world. It not only makes a remarkable impact on livelihoods today; it's building solutions needed to dramatically transform people's lives.

The role dairy has in sustainable agricultural production is one that is at the core of stronger, healthier, more dynamic communities. It's more than just producing nutritious food. Economic growth springs from activities that support more than one billion people. Families find daily nourishing strength and positive health. Family farmers care responsibly for livestock and make their land better for the next generation. All of which leads to the delight of good food being shared at the table.

What makes dairy farming truly relevant, however, is its ability to create a powerful, positive change that transforms livelihoods. It generates a stable source of year-round cash flow and affordability for the basic necessities of life. Women are empowered and children go to school. It raises living standards and lifts people and communities out of poverty.

As a power source of nutrients, dairy is recognized as one of the basic building blocks of sustainable diets in most countries. It delivers the basic nutrition necessary for people to thrive. Children receive adequate nutrition for learning and achieving their potential. Older adults preserve lean body mass for strength and mobility. That leads to a healthier population and more stable communities.

All these things make up the thread that is the sector's commitment to a future where every person has access to the essentials they need for a better life. **And it's why good things happen every day around the world because of dairy.**

Simple Facts about the Dairy Sector

The dairy sector is a large, transformative global force that has a far-reaching impact on economies, societies, and individuals.



ONE BILLION PEOPLE

have livelihoods supported by the dairy sector



600 MILLION PEOPLE

live on 133 million dairy farms around the world



NEARLY 10% PERCENT

of the world population directly depends on dairy farming



816 MILLION TONS

of milk are produced by the dairy sector annually



AMONG THE TOP FIVE:

Milk ranking as an agricultural commodity in both quantity and value terms



44.44 LITERS OF LIQUID

dairy products are consumed per capita worldwide

Dairy and the SDGs: Seeing the connections, not just the dots

The Sustainable Development Goals (SDGs) present a historic opportunity for the dairy sector to engage more deeply as a strong and positive influence on society.

In September 2015, world leaders adopted Agenda 2030 and committed to 17 SDGs to eradicate poverty, fuel inclusive growth, and protect the environment. For the dairy sector specifically, the SDGs provide a new and exciting opportunity to demonstrate how it will be a leader in delivering the goals and how it's uniquely positioned to do so.

There is a real opportunity to strengthen the understanding of the role dairy farmers play in sustainable agricultural production and to show how women, who make up a significant portion of the world's livestock keepers, play critical roles in food systems.

The SDGs also provide a global stage to encourage the appropriate intake of nutrient-rich dairy foods for healthy diets and bring evidenced-based research on how dairy products help specific populations such as children, young women, and the elderly.

With regard to environmental impacts, the SDGs create a platform where we can highlight our sustainability improvements and efforts to minimize environmental degradation and reduce greenhouse gas emissions.

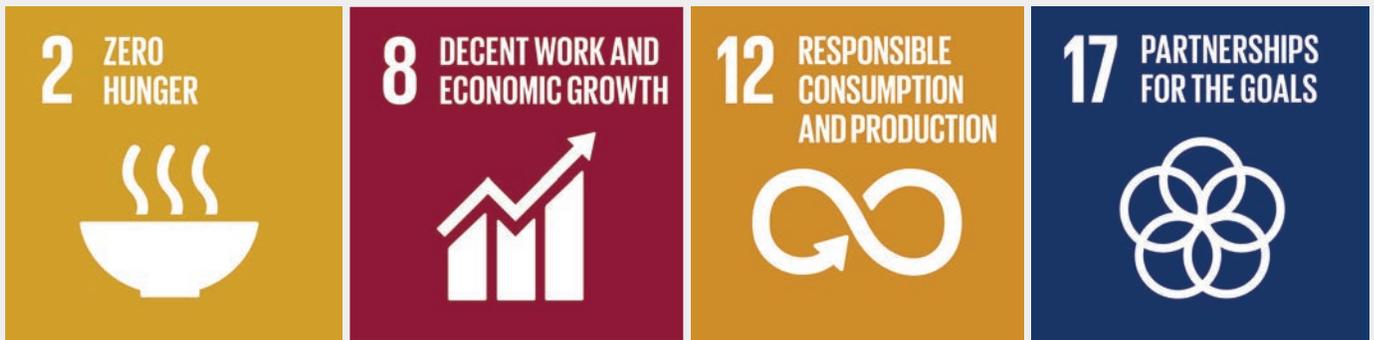
The dairy sector has tremendous ability to bring the SDGs to life. The dairy sector's engagement around the SDGs is a pathway to fostering partnerships, sustaining the benefits of agriculture, and strengthening the contribution of the sector to sustainable food security and nutrition.

How dairy maps to the sustainable development goals

The dairy sector is working towards the advancement of all of the SDGs in a focused manner. The SDGs are founded on the principle that they are “integrated and indivisible” – progress in one area is dependent upon progress in many others. Translating this idea into practical action is going to be one of the key challenges for the new agenda. There are many issues to tackle, but if the sector is not zeroing in on what it is great at and passionate about, it will not make maximum impact.

Dairy’s three strategic pillars (Nutritional Security, Sustainability and Dairy Development) correlate most closely to SDGs 2, 8, 12, and 17, which means dairy can have the greatest impact on these goals. The dairy sector has also identified seven further goals – SDGs 1, 3, 5, 6, 7, 10, and 13 – that are greatly affected as a result of the sector’s activities. Indirectly, the dairy sector influences the remaining SDGs through its impacts on society via business operations along the value chain.

SDGs DAIRY IMPACTS



SDGs DAIRY AFFECTS



SDGs DAIRY INFLUENCES





DRIVING SELF-RELIANT, INCLUSIVE ECONOMIES

Dairy is a powerful vehicle for achieving economic growth, food security, and poverty reduction

Dairy has the power to dramatically change the livelihoods of individuals, families, and communities. It generates jobs directly on the farm, up and down the value chain, and in other local business. This year-round, inclusive, and productive employment represents a major pathway out of poverty. It provides women and youth with business skills and entrepreneurial opportunities, often serving as the first stepping-stone for them to start consolidating a better place for themselves in society, especially in rural areas.

In developed and developing countries, dairy reinvigorates rural economies, provides sustainable livelihoods for smallholder farmers, and is a resilient source of economic growth locally, nationally, and globally.

- Dairy farmers produce nutritious food and earn income from selling milk, making them better able to feed their families, send their children to school, provide for their family's health, and invest in their future.
- In addition to providing food and income, dairy cows often provide enriched fertilizer for mixed farming systems, support smallholders by pulling ploughs, and help transport crops to the local market.
- Women empowered by dairy farming have increased income and influence over household expenditures, which boosts their social and economic capital.



FOSTERING GENDER EQUITY

Over **37 million dairy farms** are female-headed and 80 million women are engaged in dairy farming



PRODUCTIVE EMPLOYMENT

Approximately **240 million people** are employed, directly or indirectly, in the dairy sector



SUPPORTING LIVELIHOODS

An estimated **60-65 percent** of the income of marginal and small-scale farmers comes from dairying



SUPPORTING ECONOMIES

Milk and dairy products account for about **14% of global agricultural trade**

Key GDP Progress in 2017:

GDP, IFCN Dairy Research Network, Global Agenda for Sustainable Livestock (GASL), and the UN Food and Agriculture Organization (FAO) are working together on a new Action Network on Livestock for Social Development. Actions networks in the GASL are multi-disciplinary, multi-stakeholder groups that provide evidence to support practice change for sustainable development at the local, regional, and global level. This network plans to generate:

- A series of perspective papers entitled *Dairy for Social Development: Evidence* reviewing the literature and current knowledge on the dairy sector's contribution to and the returns of improved production and productivity along the dairy value chain.
- Guidelines and methodology to assist stakeholders in assessing the current contribution of the dairy sector and estimating the returns of investments in the dairy sector on socially-relevant indicators.
- A pilot implementation of the methodology in some selected countries, for testing and refinement, to generate data and indicators for a report on the Role of the Dairy Sector for Agenda 2030.
- A Global Report on the Role of the Dairy Sector for Agenda 2030 utilizing the guidelines, methodology, and using data from a large number of the world's countries to make a strong case on the importance of the dairy sector toward achieving Agenda 2030.



RESPONSIBLE AND SUSTAINABLE FOOD PRODUCTION

Dairy is invested in efficient food production and reducing environmental impacts

Dairy farmers are stewards of the land and soil, which is one of the most valued assets on the farm. They protect it and other natural resources for their business, as well as for their quality of life. Yield improvements, feed efficiencies, use of human food byproducts and manure as an effective fertilizer are important measures to reduce environmental impacts already in use within the sector. Dairy sector supported extension and rural advisory services are crucial to putting farmers at the center of sustainable innovation implementation.

The dairy sector is continually finding new ways to increase energy efficiencies, reduce greenhouse gas emissions, reduce water, save energy, and lower operating costs for dairy farms.

- Dairy farmers use manure not only for fertilizing, but also to generate biogas for clean energy. This is especially beneficial in rural areas, where there is no access to other energy sources, as well as where deforestation and indoor pollutions from cooking and heating are an issue.
- The dairy sector invests in programs that provide knowledge, skills, and means for introducing sustainable technology to farmers, many that also create employment opportunities for youth and women.



DELIVERING NUTRIENT-RICH FOOD

The average global dairy herd size is around two cows that give an **average milk yield of 11 liters per farm per day**



A SOURCE OF RENEWABLE ENERGY

One pound of cow manure can produce one cubic foot of biogas - enough to cook one day's worth of meals for four-to-six people in India



CARING FOR LAND AND ANIMALS

Dairy farmers take care of **363 million dairy cattle** and **20% of the world's agricultural land**



RESOURCE EFFICIENT NUTRITION

The global dairy herd **converts 2.5 billion tons of dry matter feed** annually into higher quality proteins

Key GDP Progress in 2017:

GDP is collaborating with sector leaders to drive implementation of the Dairy Sustainability Framework (DSF) to measure and improve the dairy sector's progress in efficient food production and reducing environmental impacts.

- DSF members, aggregators, academia, and representatives from civil society worked together to develop indicators to track and report the aggregate performance of the dairy sector against the framework's criteria for Soil Nutrients, Water, Soil Quality and Retention, Biodiversity, and Working Conditions.
- Supported by the DSF Governors, members within SAI Dairy Working Group are working to define models for maturity levels of sustainable dairy production that will allow participating companies to demonstrate continuous improvement of sustainability performance. This development will sit outside and build on the framework.
- The DSF aided Rabobank on the report "*Dairy and the Sustainable Development Goals: The Dairy Sector's Contributions and Opportunities*," which identifies links and synergies between the SDGs and the DSF criteria.
- The DSF signed a Memorandum of Understanding with Dairy Asia to utilize the strategic, directional, and knowledge support of the framework in 13 Asian countries - which represents nearly half of the world's population and some 26% of global milk production.

A close-up photograph of a young child with dark, curly hair, smiling and eating a vanilla ice cream cone. The child is wearing a teal-colored sweater. The background is a soft, out-of-focus light color.

ENCOURAGING THE APPROPRIATE INTAKE OF NUTRIENT-RICH DAIRY FOODS

Dairy provides access to essential nutrients that help the body and mind reach full potential

Dairy is the most balanced nutrition you can find, making a significant contribution to the body's needs for energy, protein, and micronutrients. It's one of the basic building blocks of sustainable diets in most countries, playing a key role in childhood development, improving nutrition deficits in prospective mothers and supporting healthy aging in older adults. Dairy is a fundamental part of sustainable food systems that aid in the prevention and control of noncommunicable diseases and issues related to malnutrition.

The dairy sector makes the world a healthier place by supplying important nutritional benefits to billions of people every day. Anywhere there is a need for basic nutrition, as well as better nutrition, dairy is there.

- **Milk is vital to well-nourished children**, which means better physical and mental development, improved educational outcomes, and a greater chance for them to reach their full potential.
- **The addition of milk-based proteins** to therapeutic and supplementary foods allows children and adolescents to respond faster to treatments for malnutrition.
- **For pregnant and lactating mothers**, nutrient-rich dairy foods support the critical calorie, protein, and micronutrient intake necessary to promote maternal and infant health, as well as healthy birth weights.



A KEY CONTRIBUTOR TO GLOBAL NUTRITION

Milk contributes **5% of energy** and **10% of protein** to the global population



NUTRITION THAT POWERS THE WORLD

Milk is the **fifth largest provider of energy** and the **third largest provider of protein**



STRONG AND HEALTHY BONES

A cup of milk contains about **300 milligrams of calcium**, nearly 1/3 of a young woman's recommended daily amount



A PROTEIN POWERHOUSE

The DIAAS score of whole milk powder is **90% higher than pea** and **200% higher than wheat proteins**

Key GDP Progress in 2017:

GDP is collaborating with multiple researchers and organizations to spread dairy nutrition information. These efforts pollinate the wider world of media, academia, and policy makers with factual contributions inspired by principles like balance in diets, accurate information for evaluating a food's profile, and it's ability to deliver nutrition.

- **GDP's Nutritional Security Lead, Dr. Greg Miller**, was placed on a High-Level Panel of Experts Project Team to develop a report on Nutrition and Food Systems for the United Nations Committee on World Food Security.
- **The Ecosystem Inception Meeting convened by GDP** produced the independent position paper *The Chicago Consensus on Sustainable Food Systems Science*, which identifies the concepts central to the study of food systems science.
- **The first two phases of the Protein Quality Research Methods study** has begun collecting DIAAS scores from 10 foods. The funding for the study, approximately \$1.8M, came from the dairy, beef, eggs, and soy sectors.
- **The Dairy Research Consortium, for which GDP is the secretariat**, has prioritized their efforts around four topics, collaborating on projects to assess the beneficial health effects of whole milk dairy foods and to reinforce dairy's role in bone health throughout aging.
- **GDP is conducting a literature review to evaluate dairy's contribution toward nutrition interventions targeting malnutrition** - what gaps exist, where the priorities are and potential partners for collaborative efforts.

BEING THE EXAMPLE OF LEADERSHIP AND ACTION

The dairy sector helps the world see the purpose and progress of transforming livelihoods and communities

Every day, good things happen all around the world because of dairy. Billions worldwide rely on the dairy sector and its products to make a positive difference in their lives. Whether transforming communities or as a part of a meal that gathers the family at the table, dairy gives people life-sustaining power and the strength to achieve, which leads to a more vibrant and productive society. Working together with local and global leaders, the dairy sector brings hope that dramatic change can and will happen.

While many might know about dairy's nourishing strength, the dairy sector contributes more than just tasty goodness to the world's population. It has an immensely positive impact on global social, economic, and environmental issues and will shape the future of sustainable agriculture, food systems, and diets.

- Dairy brings family and friends together to experience the delight of sharing good food and celebrating the satisfaction of an active and healthy life.
- The improved dietary diversity and nutritional outcomes of dairy household members make it a strong and supportive part of sustainable food systems and diets.
- The dairy sector works with governments and world bodies at every level to strengthen the understanding of the contribution of the sector to sustainable food security and nutrition.



RELEVANT ACROSS THE GLOBE

More than **6 billion people** worldwide consume milk and milk products—the majority living in developing countries



NUTRITION PEOPLE DESIRE

90% of global respondents said they find milk nutritious, healthy, tasty, and their best source of calcium



FILLING NUTRITIONAL NEEDS

32% of global respondents seek foods high in protein to fulfill their nutritional needs



CELEBRATING THE GOODNESS OF DAIRY

World Milk Day 2017 sparked **835K engagements** (sum of likes, comments, retweets etc.) on social media

Key GDP Progress in 2017:

GDP is working with the International Milk Promotions Group (IMP) and International Agri-Food Network (IAFN) to engage the global community on how dairy makes people's lives better every day. In addition to giving the dairy sector excellent visibility and augmenting its credibility within the global community, these activities represent an opportunity to be heard and to make a difference.

- At the UN's High-Level Political Forum, GDP Dairy Ambassadors had a visible presence in 23 events and meetings on topics related to dairy and animal agriculture. Speakers discussed the importance of livestock and dairy in sustainable development and, at the Sustainable Development Goals Business Forum, the commitments needed to deliver the SDGs.
- GDP Executive Director Donald Moore was elected Chair of IAFN, an organization that works on a wide variety of issues relating to agriculture, food, and nutrition, and serves as the focal point for the Private Sector Mechanism of the UN Committee on World Food Security.
- GDP led the first ever coordinated sector effort for World Milk Day, which featured 583 events in 77 countries, and generated 402 million impressions of #WorldMilkDay on social media.
- The GDP/IMP Marketing Group developed social media conversation playbooks and tested a pilot program to gauge its effectiveness in conveying positive dairy messages, occupying media space, and creating a barrier against negative influences.



GOVERNANCE GROUPS

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

Rick Smith

Chair of the GDP Board
President and Chief Executive Officer
Dairy Farmers of America, Inc.

Theo Spierings

Chair-Elect of the GDP Board
Chief Executive Officer
Fonterra Co-operative Group Limited

Roelof Joosten

Chief Executive Officer
Royal FrieslandCampina

Peder Tuborgh

Chief Executive Officer
Arla Foods amba

Jacqueline Chow

Deputy Chair of the GDP Board
Chair of the Operational Committee
Fonterra Co-operative Group Limited

Dr. Margrethe Jonkman

Deputy Chair-Elect of the GDP Board
Chair-Elect of the Operational Committee
Corporate Director Research & Development
Royal FrieslandCampina

Dr. Judith Bryans

President
International Dairy Federation

Miles Hurrell

Chief Operating Officer-Farm Source
Fonterra Co-operative Group Limited

Jerry Kaminski

Executive Vice President
Chief Operating Officer, International
Land O'Lakes, Inc.

Hanne Sondergaard

Executive Vice President and Chief Marketing Officer
Marketing & Innovation
Arla Foods amba

Frank van Ooijen

Director Communications and Sustainability
Royal FrieslandCampina

Jay Waldvogel

Senior Vice President of Strategy and
International Development
Dairy Farmers of America, Inc.

Global Dairy Platform Leadership Team

Donald Moore

Executive Director

Jerreau Beaudoin

Communications Director

Dr. Cindy Schweitzer

Technical Director

Nata Wier

Office Manager

Kathy Laning

Meetings and Conferences

Global Dairy Platform Leads

GDP Leads drive specific work plans and projects connected to dairy's work in Nutritional Security, Sustainability, and Dairy Development.

Dr. Greg Miller

Nutritional Security Lead

Brian Lindsay

Sustainability Lead

Ernesto Reyes

Dairy Development Lead



GLOBAL DAIRY PLATFORM COMMERCIAL AND ASSOCIATE MEMBERS

Commercial Members

Arla Foods amba, Denmark
California Dairies, Inc., United States
China Mengniu Dairy Company, China
Dairy Farmers of America, United States
Dairy Partners Americas, Brazil
DMK Deutsches Milchkontor, Germany
Fonterra Co-operative Group Limited, New Zealand
Glanbia Nutritionals, United States
Land O' Lakes, Inc., United States
Leprino Foods Company, 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, Australia
Ornua Co-operative Limited, Ireland
Royal FrieslandCampina N.V., The Netherlands
Saputo Inc., Canada
Sodiaal Union, France
St. Albans Cooperative Creamery Inc., United States
Swiss Valley Farms, United States
TINE SA, Norway
United Dairymen of Arizona, United States
Volac International Ltd., United Kingdom

Associate Members

CoBank, United States
Elanco, 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
California Milk Advisory Board, United States
Czech and Moravian Dairy Association, Czech Republic
Consortio Lechero, La Cadena Lactea de Chile, Chile
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 UK, United Kingdom
DairyCo, United Kingdom
Danish Agriculture & Food Council, Denmark
Danish Dairy Board, Denmark
Dutch Dairy Association, The Netherlands
Eastern and Southern Africa Dairy Association, Kenya
Embrapa Dairy Cattle, Brazil
European Dairy Association, Belgium
Food and Dairy Applied Research Centre,
VHL University of Applied Sciences, The Netherlands
La Federación Nacional de Industrias Lácteas, Spain
Gardiner Foundation, Australia
Icelandic Dairies Association, Iceland
International Dairy Federation, Belgium
International Dairy Foods Association, United States
International Farm Comparison Network, Germany
Irish Co-operative Organisation Society, Ireland
Israel Dairy Board, Israel
Japanese Dairy Industry Association, Japan
J-Milk (Japan Dairy Association), Japan
Korea Dairy Committee, South Korea
Korea Dairy Industries Association, South Korea
Korean Society of Dairy Science and Technology,
South Korea
Lactea Brasil, Brasil
Lekhanath Dairy International (Nepal) Pvt. Ltd., Nepal
Milchindustrie-Verband e.V., Germany
Milk Marketing (NSW) Pty. Ltd., Australia
MilkPEP, United States
Milk Producers Organisation, South Africa
National Dairy Council, Ireland
National Dairy Council, United States
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
UK Yogurt Council, United Kingdom
US Dairy Export Council, United States

Global Dairy Platform

10255 W. Higgins Road, Suite 820
Rosemont, Illinois, 60018-5616

United States

Phone: +1 847 627 3388

Fax: +1 847 627 3380

Info@globaldairyplatform.com

www.globaldairyplatform.com



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