



# The Platform

GLOBAL DAIRY PLATFORM NEWSLETTER • OCTOBER 2015

## Dairy Sector Looking to United Nations Agenda

*Dairy Sector Looks to Shape its Role in the Post-2015 United Nations Sustainable Development Goals*

With the United Nations (UN) adoption of the Post-2015 Sustainable Development Goals (SDGs) in September, GDP is now in the final stages of developing a plan for raising dairy's profile within the organization as a key to delivering superior nutrition, sustainably to the world's population.

The seventeen new SDGs aim to eradicate hunger and extreme poverty, reduce inequality within and between states, achieve gender equality, improve water management and energy and take urgent action to combat climate change. The goals represent the most significant international effort to date to converge economic and environmental objectives. They also offer a significant opportunity to raise awareness of dairy's role as indispensable to people's well-being, sustainable food systems and economic prosperity.

Working with consultancy Emerging Ag, GDP identified and charted which UN agencies, programs and initiatives have objectives linked to either nutrition, sustainability or economic development. A mapping exercise was conducted to discern which objectives fall most directly within the sector strategy's field of vision. An assessment was then done to document the degree of existing engagement



*The 2030 Agenda for Sustainable Development goals, projected on the facade of the United Nations Headquarters, was ratified by all 193 countries at a September summit. The goals and targets will stimulate action over the next 15 years in areas of critical importance for humanity and the planet.*

of the dairy groups with those UN bodies as well as the “white-space” where dairy is not active in dialogue on key issues affecting the sector's future.

*Story continues on page 7*

## Sustainable Food Systems Project Enters Second Phase

*Researcher “Ecosystem” to Build Consensus on what Constitutes a Sustainable Food System*

While promoting dairy nutrition and the sector's progress on sustainability, GDP has consistently found itself engaged in larger conversations about what constitutes a sustainable global food supply. A challenge in these discussions is the lack of robust science that considers the topic in a holistic fashion. Additionally, what research is available is generally believed to be incomplete and of variable quality.

This creates a potential scenario where, in the rush to promote specific recommendations, policy makers use limited evidence to make judgments on what constitutes a sustainable food system. Given the projected global food challenge, it's important that society's view of sustainable food production is accurate and balanced so

that government policy is founded on a solid data set. With the assistance of U.K. consulting firm Oakland Innovation, GDP is bringing together a community of relevant scientists across the area of food system sustainability to create a consensus position and to identify – and ultimately address – research and data gaps.

Under the proposed model, academic researchers, each representing a specific area of expertise, would come together to provide informed perspectives across the topic of sustainable food systems, encompassing affordable nutrition, environmental impact, social influence, and economic impact. Through discussion and interaction

*Story continues on page 3*

# GDAA Appoints Independent Advisory Council

## Organization Publishes Inaugural Dairy Sustainability Framework Annual Report

Eight independent global sustainability stakeholders have been selected as representatives on the Global Dairy Agenda for Action's (GDA) initial Advisory Council.

Asda/Walmart, American Humane Association, Global Round Table for Sustainable Beef, Food and Agriculture Organization of the United Nations, Rabobank, Solidaridad, World Bank and World Wildlife Fund will review the progress of the Framework to both challenge and advise the Governors on all aspects of the program.

"The GDA is not only striving for transparency, but to do things collaboratively. This advisory council will be invaluable in helping us understand our stakeholders' perspectives and finding opportunities to advance our shared goals," said Brian Lindsay, GDP Sector Lead for Sustainability. "It gives the Governors a vehicle to have a discussion and a mechanism to solicit input."

The GDA also recently published its inaugural Dairy Sustainability Framework (DSF) Annual Report, the dairy sector's program to align, connect and demonstrate continuous improvement in sustainability.

The report outlines how members, who currently represent 17% of global milk production and over half a million farmers with a total of nearly 18 million cows, will report on their own sustainability initiatives within 11 set criteria. These categories are to be prioritized at the local/regional level with participants tracking initiatives

along a continuous improvement spectrum. Many of these initiatives already have targets set against them and will be reported on in an aggregated manner in future DSF Annual Reports.

"Over the past year, we have improved our understanding of the way the DSF works around the world, and we are learning to work well together across our different geographies," said Lindsay. "We hope our first Annual Report will serve to encourage dialogue between the dairy sector and our sustainability stakeholders."

GDP is a signatory of the GDA along with European Dairy Association (EDA), Eastern and Southern African Dairy Association (ESADA), Pan-American Dairy Federation (FEPAL), International Dairy Federation (IDF), Dairy Australia, The Innovation Centre for US Dairy and Sustainable Agricultural Initiative Platform (SAI). 



The inaugural Dairy Sustainability Framework Annual Report is available for download on the GDA website.

## GDP Hosts Protein Industry Research Discussion

### Group agrees to collaborate to develop a funding model and a protein industry research consortium

GDP recently held a protein industry workshop in Chicago to review a proposal from a research consortium for completing the dataset required for implementation of the new Digestible Indispensable Amino Acid Score (DIAAS) protein quality methodology. Additionally, the meeting was a catalyst to get funding commitments by the end of 2015 so that research can start in 2016.

The workshop was attended by researchers and representatives of thirteen dairy groups, as well as from the egg, beef, pork, soy, pulses and legumes and the FAO.

The meeting reviewed the FAO expert consultation that took place in 2011 and the conclusions of the Working Group meetings in 2013. Those conclusions include a need to develop the database of DIAAS scores to allow for implementation of the new protein quality method.

Professor Paul Moughan shared a research proposal from a consortium of international researchers that includes three phases of research over two years totaling approximately

\$4 million. The attendees endorsed the proposal and agreed to work collaboratively to develop a funding model and a protein industry consortium. An action team has been identified to put together a recommendation document for requesting funds.

Additionally, the FAO explained its plans with the International Nutrition Foundation to develop a protein research strategy and to seek industry support for implementation. The work of the protein industry consortium is aligned with FAO's vision and FAO indicated that it would support the outcomes from the research.

"Although the quantity of protein you eat is most important when it comes to meeting your daily protein needs, the quality of protein you consume is important as well," GDP Technical Director Dr. Cindy Schweitzer, PhD, CFS. "The DIAAS method will provide an important piece of information for assessing how foods contribute to sustainable diets for our growing global population." 

# Sustainable Food System Consensus *continued from page 1*

this network would help to identify key gaps and critical weaknesses in current knowledge.

Because this is an independent group, they can be viewed as a credible and objective force aimed at advancing the quality of the debate. This should allow the network the opportunity to influence research funding (public and private, national and pan-national) in order to address critical gaps in the current knowledge base.

“Fundamentally, GDP’s objective is to ensure the creation of a global framework and network that encourages informed debate and supports the efforts of the global researchers to advance understanding on food system sustainability – in whatever sector they may be,” said Jay Waldvogel, GDP Operational Committee Member and Senior Vice President of Strategy and International Development for Dairy Farmers of America, Inc. “The expectation is that this will evolve into a self-sustaining “ecosystem” that would help catalyze the formation of a consensus view.”

To “stress test” the concept and model, interviews were conducted with key staff of Intergovernmental Panel on Climate Change (IPCC), Food and Agriculture Organization of the United Nations (FAO), United Nations Environment Programme (UNEP), CGIAR Consortium, Manomet and Biodiversity International. A specific focus was put

on assessing receptivity to the ecosystem framework, understanding challenges it may face, the support it might win and the factors influencing these responses.

Overall, interviewees believed that bringing together a network of scientists to improve the quality of research into sustainable food systems was crucial, as was including all areas of sustainability in the discussion on food systems.

**GDP is bringing together a community of relevant scientists... to create a consensus position and to identify, and ultimately address, research and data gaps.**

The next step is identifying experts in the relevant fields of research (scientific, social and economic as appropriate) to serve as the nucleus of the ecosystem.

“Facilitating the development of this ecosystem will lead to an improved understanding of what constitutes a sustainable food system,” said Donald Moore, GDP Executive Director. “This group will give us a solid foundation to discuss the role dairy can have in feeding the projected population of 9.5 billion people by 2050.” 

## New Research Briefs Available in the GDP Member Center

*Global Dairy Update* is a new publication series that highlights current evidence and/or policy related to the health benefits and dietary recommendations of dairy foods and their role in nutritional security, sustainability and dairy development. Updates are available for download from the GDP Member Center. For more information, contact GDP Technical Director Dr. Cindy Schweitzer at [cindy.schweitzer@globaldairyplatform.com](mailto:cindy.schweitzer@globaldairyplatform.com).

### Global Dairy Sector Research Update – WHO Fatty Acid Study

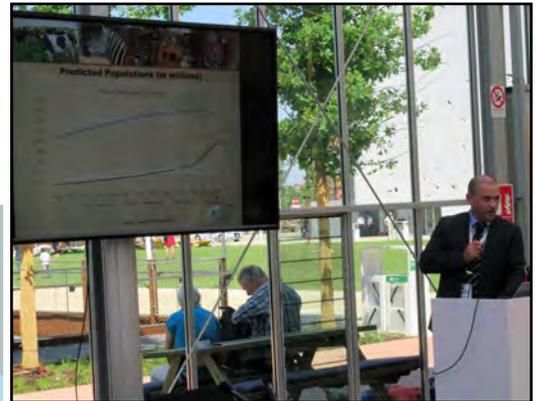
This update summarizes the systematic review and meta-analysis commissioned by the WHO as the background evidence for updating WHO guidelines on saturated and trans fatty acids. This is the first meta-analysis to examine associations between saturated and trans fats with all-cause mortality. The review has been presented to the WHO Nutrition Guidelines Advisory Group (NUGAG) on several occasions. New recommendations from WHO are expected to become public in the near future.

### Global Dairy Sector Research Update - Protein Summit 2.0.

This update captures conclusions from Protein Summit 2.0, a meeting of international nutrition experts who discussed the importance of optimal intakes and timing of high-quality protein to achieve and maintain a healthy body weight, improve metabolic function and support healthy aging. Detailed information can be found in the comprehensive reviews from Protein Summit 2.0 published in the June 2015 supplement of the *American Journal of Clinical Nutrition*. GDP and other food industry groups provided support for Protein Summit 2.0.



# The Journey to a Shared Sector Vision



**The rapidly accelerating speed of change and a sense of urgency about dairy's relevance in the future is driving the sector to collaborate on a set of strategies to focus its voice and prepare for challenges that lie ahead. A key to success is uniting the various dairy organizations in a shared sector vision.**

To help achieve that goal, GDP leadership embarked on a series of face-to-face meetings in 2015 to build global consensus and define the collaborative

actions needed to raise awareness of the dairy sector's positive impact on key issues within nutritional security, sustainability and dairy development.

“During the strategy development process, GDP's Operational Committee emphasized that collecting sector input through an ‘action, not words’ approach was a critical step,” noted GDP Executive Director Donald Moore. “Moreover, we had an objective to not only get feedback from key stakeholders, but also help them understand at a deeper level the challenges the sector needs to be ready to address in the future.”

To “stress test” the new strategy, GDP started by convening a Dairy Sector Strategy Summit of 30 business leaders from across the global dairy value chain to gain input from a broader, more complete array of industry representatives. The International Milk Promotions Group, European Milk Forum and various IDF Standing Committees were also engaged to discuss the strategy and opportunities where it can support their group's work and activities.

“These groups made an important contribution because they challenged our thinking and how we perceived implementation,” commented Moore. “A good strategy contains a ‘what,’ a ‘so what’ and a ‘now what.’ It's easy to get bogged down by the ‘what’ part and neglect the rest.”

GDP then organized four Regional Meetings that were attended by more than 380 participants in the United States, China, Italy and Japan. In addition to discussing the three sector strategy pillars, these meetings provided an opportunity to highlight connections between global strategy and regional markets. CEO's and analysts from Rabobank discussed trends influencing market development and provided insight into the overall direction of the sector. Second day workshops focused on collaborative actions surrounding global communication and emerging research areas such as protein quality.

Feedback from all these groups was collected and assimilated into directional plans that were presented to the 95 members in attendance at GDP's 9th Annual Meeting in Vilnius, Lithuania. Post-meeting surveys showed very positive scores for the strategy and the progress of projects. The International Engagement Strategy (see story on page 1), a key project with the Nutritional Security pillar, was of particular interest as it not only painted a clearer picture of the plan to raise the profile of the sector with United Nation's agencies, but also the unique opportunities multiple organizations have to engage within the strategy.

“Once decoded, the strategy is really about a focused effort on communicating how the dairy sector brings society, sustainability and world nutrition together,” said Moore. “When done effectively, the ability to rally the millions of people who work in this sector around a common strategic message will become a powerful tool.” 



A second day workshop connected to GDP's Regional Meeting in Tokyo, Japan focused on recent anti-milk activities in Japan. Groups discussed developing positive communications as a way to balance anti-dairy rhetoric online.



At GDP's Regional Meeting in Milan, Italy, Kevin Bellamy, Senior Dairy Analyst at Rabobank, highlighted trends influencing market development and provided insight into the overall direction of the dairy sector.



Ernesto Reyes, part of the IFCN consulting team working with GDP to create a model for building a pre-competitive Dairy Development strategy, presented their initial plans at GDP's Annual Meeting in Vilnius, Lithuania.

# GDP Welcomes New Members to Network

Please join us in welcoming Global Dairy Platform's newest members, California Dairies, Inc. in the United States, Czech Moravian Dairy Association in Czech Republic, La Federación Nacional de Industrias Lácteas in Spain, Icelandic Dairies Association in Iceland, Milchindustrie-Verband e.V. in Germany, Food and Dairy Applied Research Centre, VHL University of Applied Sciences in The Netherlands and Yili Group in China.



**California Dairies, Inc.** is the second largest dairy processing cooperative in the United States and produces nine percent of the milk in the United States from 435 dairies. The member-owned milk marketing and processing cooperative is co-owned by 390 California dairymen who ship 18 billion pounds (8.1 million metric tons) of milk annually. A manufacturer of quality fluid milk products, butter and milk powders, it has sales of more than \$4 billion across all 50 states and in more than 50 foreign countries.



**Czech Moravian Dairy Association** is a professional organization representing companies operating in the dairy industry or directly connected with this sector. Czech Moravian Dairy Association members cover approximately half of the output of milk produced in the Czech Republic.



**La Federación Nacional de Industrias Lácteas (FeNIL)** represents more than 80 companies and over 95% of domestic production of consumer liquid milk, cheese, yogurt, butter and dairy desserts in Spain.



**Icelandic Dairies Association** was formed in 1985 and is comprised of six Iceland milk processors. Its mission is to represent national industry domestically and abroad, as well as promote the use of efficient and best practices in dairy farming.



**Milchindustrie-Verband e.V. (MIV)** is the umbrella organization of the German milk processing companies, representing approximately 100 privately owned, cooperative and multinational companies. Around 95 percent of German milk deliveries or 26 million tons of milk and 100 percent of the export volume are covered by the association's members. With an annual turnover of about 22 billion euros, the German dairy industry is the largest division in the country's food sector.



**Food and Dairy Applied Research Centre, VHL University of Applied Sciences** forms a link between education and the business sector, government, institutions and other knowledge partners to develop and apply innovative knowledge in the dairy field. In doing so, VHL focuses on the complete chain: from sustainable dairy farming, logistics and processing to retail and the consumer.



**Yili**, China's largest dairy manufacturer, was founded in 1993 and is headquartered in Hohhot, China. Yili Group consists of five major business divisions including liquid milk, ice cream, milk powder, yogurt and raw milk, with nearly 100 subsidiaries and more than 1000 products.

## GDP Sustainable Diets Report and Database Available

GDP has completed the first interpretive report and database of published research examining environmental, economic and/or social impacts of various dietary patterns.

This collection of information will provide understanding of the current state of knowledge and direct future research in this area. The report summarizes the available studies, interprets the existing evidence, identifies limitations and

gaps, and documents implications for dairy. The database includes a *Research Studies Main Database* with detailed information and a shortened *Log of Published Studies*.

We welcome your comments about this new database and suggestions for how this information can be used. Please send any questions or comments to [cindy.schweitzer@globaldairyplatform.com](mailto:cindy.schweitzer@globaldairyplatform.com). 

## Dairy Linking to Sustainable Development Goals *continued from page 1*

“As we refine our strategy to position dairy as a key component of a sustainable food system, it is vital that we engage with groups that are shaping the global debate,” said Rick Smith, GDP Board Chair and Chief Executive Officer of Dairy Farmers of America, Inc. “The evolving role of agriculture as identified by the UN in the Sustainable Development Goals presents an opportunity to demonstrate the unique value delivered by the dairy sector.”

The plan comes at a pivotal moment as the role of agriculture in the SDGs has risen to the front of the international policy agenda. This was driven by the food crisis of 2007, which rekindled a commitment to food security and nutritional issues. There is also a new interest in engaging the private sector in investment and investigating its role in delivering development.

“Interest in the role of business and investment in delivering development is likely to stay given the importance of hunger, malnutrition and the sustainability of agricultural production systems in the SDGs,” notes Robynne Anderson, President of Emerging Ag, Inc. “The opportunity exists to foster a new reputation with these world bodies, as well as other non-governmental organizations (NGOs).”

GDP has begun the first step towards understanding the UN and the NGOs landscape and ways the dairy sector can engage. GDP Nutritional Security Sector Lead Dr. Greg Miller served as a panelist at the European launch of The Chicago Council on Global Affairs’ 2015 Global Food Security Report and as dairy champion at a thought leaders meeting at The Chatham House in London in June. Later that month, a contingent of dairy sector representatives led by Susie Møller Hjørth of Arla Foods, Inc. and GDP Technical Director Dr. Cindy Schweitzer, attended UN planning meetings in New York on the delivery of the SDGs.

In all these interactions, the most pronounced learning has been the underdeveloped knowledge among global and regional influencers of the positive and vital attributes of the global dairy sector in sustainable food systems.

“What we are learning is that if we want to maximize our achievement and investment, we can’t simply be reactive,” said Jacqueline Chow, Chair of GDP’s Operational Committee and Chief Operating Officer for Fonterra Co-operative Group Limited. “Dairy must engage in a whole-sector strategy to not only build its presence, but in clarifying its role in delivering vital high-quality sustainable nutrition that is affordable and accessible. That requires us to be ready, well-informed and proactive.”

With the mapping exercise nearing completion, GDP is working with sector leaders to identify and prioritize the highest impact opportunities and to determine which

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organizations or groups are best placed to address these areas. Many dairy groups are already active with UN organizations, in particular on technical issues relative to regulations, standards and norms. The intent of the Dairy Sector Strategy is not to duplicate efforts in this area, but rather to focus on opportunities which enhance dairy’s position and relationships around the nutritional security, sustainability and dairy development pillars. Doing this will provide a robust platform for enhanced engagement built upon both technical and positional influence.

“The most important and inspiring trend GDP sees across the sector is its commitment to engage in problem solving on tough issues,” said Smith. “GDP’s strategy involves taking ownership of dairy’s story. Dairy can’t just declare it’s critical to global nutrition and expect instant acceptance of that fact. It will take significant effort, time and a change in mindsets to bring the strategy to life.” 

### Paper Highlights Nutrient Richness of Dairy products

A newly published paper, *Contribution of Food Groups to Energy and Nutrient Intakes in Five Developed Countries*, is available for download from the GDP Member Center in the GDP Publications section. The paper, authored by Nancy Auestad, Judith S. Hurley, Victor L. Fulgoni III and Cindy M. Schweitzer, was published on 8 June in the journal *Nutrients*. It highlights the nutrient richness of milk and dairy products, especially regarding the contribution of under-consumed nutrients.

This work was commissioned by the Dairy Research Consortium and coordinated by GDP. For further information, contact [cindy.schweitzer@globaldairyplatform.com](mailto:cindy.schweitzer@globaldairyplatform.com). 



# GDP/IMP Marketing Group Activities Focused on Delivering the Dairy Sector's Relevance Story

In the film *Minority Report*, a character walks into a mall and a billboard says to him “You could use a Guinness right now!” Later another calls out “How did those turtleneck sweaters you purchased work out for you?” In the future – at least as envisioned in this movie – marketing will seek to deliver messaging that is contextually relevant to who we are, what we are interested and what we’ve bought.

Perhaps this future isn’t as science fiction as we might think. Over the last several years GDP and the International Milk Promotions Group (IMP) have focused on the evolving future of global dairy marketing. Specifically, the group has pinpointed re-establishing the relevance of dairy to stakeholders – consumers, governments, organizations and educators – as a key challenge.

It can be difficult for messages to “break through” today’s mass media environment where the average adult is exposed to between 1 million and 7 million communications messages every year. With so much message clutter, consumers must block the irrelevant and let the relevant ones pass through. But what is it about the ones that get through that make them relevant? They are the ones that tell a clear and meaningful story that shares common values with the recipient.

Working off this important insight, the GDP/IMP Marketing Group has begun the work of developing action plans around four key strategies that will lead to an environment for communicating dairy relevance:

**1. Positive Information Awareness** – This strategy is not just “pushing” our positive messages, but also contextualize them so that stakeholders connect with the information. The sector has done a very good job of building the fact base, but research shows the actual choice to continue drinking milk is driven on an emotional level. Additionally, the information needs to be where consumers are looking and when they are ready to use it.

**2. Balance the Anti-Dairy Debate** – One of the challenges in embracing the Positive Information Awareness plan is that anti-dairy activists will see those activity points as opportunities to mobilize and distribute negative comments. Rather than engage the activists who are set in their views and driven by an agenda, this strategy aims to change the narrative by focusing on the neutral reader and providing positive reassurance and messages that concern the reader. This work involves

developing a “desired emotional response” matrix on the most common anti-dairy myths and misinformation points.

**3. Key Influencer Engagement** – This strategy aims to create a model to align influencer targets, strategies, and messages, as well as consolidate and strengthen the engagement with key influencers at the global and regional levels. Understanding where influence and opportunities lie within the myriad of organizations, programs and initiatives, as well as structuring a defined process for positioning sector representatives as experts and ambassadors, are crucial components.

**4. Alignment with Strategic Affinity Group** – Finally, there are groups that share common interests, beliefs and values with the dairy sector. Affinity Groups share values and information amongst members who are highly trusting of each other. If the Affinity Group’s shared values are aligned with dairy’s relevance, strong supporting champions and advocates will result. This strategy is focused on assessing how the dairy sector should organize at the global level to engage and deliver outcomes.

For more information on GDP/IMP Marketing activities or to get involved with one of the taskforces working on these projects, contact Donald Moore, GDP Executive Director, at [donald.moore@globaldairyplatform.com](mailto:donald.moore@globaldairyplatform.com). 

## Save the Date!

**GDP/IMP 7<sup>th</sup> Annual  
Global Dairy Marketing Meeting**  
19-21 June 2016 • San Francisco, California, USA

