



GLOBAL DAIRY PLATFORM

# Discover the Good



2018 ANNUAL REVIEW



The sector's collaborative work is helping consumers and stakeholders discover the good dairy does every day around the world



## FROM THE EXECUTIVE DIRECTOR

It's hard to believe that with over six billion people regularly consuming dairy foods globally, that there are still misperceptions and questions regarding the goodness of dairy products and the sector's role in a sustainable agricultural system.

Dairy is one of the basic building blocks of a sustainable diet in most countries, yet many do not understand its ability to dramatically improve the livelihoods of individuals, families, and communities. Dairy products are some of the most extensively researched foods, yet many people are still unclear on its significant contribution to the body's needs for energy, protein, and micronutrients. The dairy sector has an established record of embracing new practices, technology and innovation for efficiency and sustainability, yet many people still question its commitment to responsible and sustainable food production.

That disconnect and the opportunity to improve the social, nutritional, economic, and environmental outcomes of millions are what drives the work of Global Dairy Platform. GDP's collaboration of dairy companies, associations, scientific partners and other bodies are focused on helping stakeholders and consumers discover the good dairy does every day around the world.

Providing access to affordable, and nutrient-rich foods is fundamental to the development and quality of life for people around the world. There is a pressing need to make better use of the food system—estimates are that only half of the world's population consumes appropriate quantities of calories and nutrients, while billions consume too few or too many. With population projections reaching 10 billion by 2050, balancing nutritional and food demand needs while cutting emissions is of critical importance.

As such, it's more important than ever that the dairy sector adds its expertise, research, and perspective on solutions for improving health, livelihoods, and the global food system. As a sector we must advocate that food policy decisions are based on well-designed, evidence-based research, and address myths and misperceptions so that those searching for information on dairy discover the good.

It gives us great pride to present this 2018 Annual Review with an overview of how the dairy sector is demonstrating its contribution to global food systems, healthy diets and sustainable livelihoods. GDP is proud of the achievements of the dairy sector this past year and thanks its members and governance groups for their continued direction and support.



Donald Moore, Executive Director



# Building the Evidence

**The global challenges of nutritional security, environmental sustainability and nutrition-related disease continue to shape the 21st century.**

Discussions, forums and whitepapers abound on how to achieve sustainable food systems, reduce environmental footprints, and eliminate poverty. Unfortunately, there is a lack of sufficient data or research to support the validity or practicality of many recommendations. Due to a sense of urgency for action now, there is a desire to make quick judgments - even without supporting data. Guidelines

relying on circumstantial evidence, however, can be little more than educated guesses.

Collective sector research efforts over the past decade reflect a series of hard-won improvements in the understanding of dairy's positive role in supporting healthy people, families and communities. Yet, while there is a growing body of evidence, changing policies and recommendations once they have been established, continues to be a challenge.

GDP continues to facilitate the development of a complete research portfolio of the nutritional, environmental, social and economic impact of dairy, with the goal of supporting evidence-based policies and recommendations.

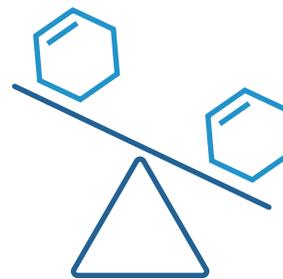


### **New Study: Dairy Development's Impact on Poverty Reduction**

GDP, the UN Food and Agriculture Organization (FAO), Global Agenda for Sustainable Livestock (GASL) and the International Farm Comparison Network (IFCN), produced the first in a series of prospective study papers on dairy's role in social development, *Dairy Development's Impact on Poverty Reduction*. The reviewed literature provides strong evidence that dairy development makes a significant contribution to poverty reduction, both at a household and community level. At the highest level, the study shows that dairying not only contributes a regular source of food and income, but it puts farmers in a better position to feed their families, send their children to school, provide for their family's health, and invest in their future. These results and their consistency across study types, countries and indicators provide strong evidence that engagement in dairying was the cause, rather than the result of, higher household welfare.

### **New Evidence: Documenting Dairy's Protein Quality Advantage**

GDP is facilitating an international consortium of food industry sectors and researchers led by the Riddet Institute to build the dataset required for the Digestible Indispensable Amino Acid Score (DIAAS) protein quality methodology. This will provide an accurate measurement of the body's absorption of the amino acids that compose protein and a protein source's contribution to dietary requirements. Comparison data from ten food products in humans and pigs will be completed by the end of 2018 and submitted for peer-review publication. Subsequently, creating a collective position and common language will be key to demonstrating dairy's versatility as a quality protein source and as a complement to other food staples.



### **New Study: Dairy's Progress in Reducing Green House Gas (GHG) Emissions**

Global climate change is one of the most significant challenges we face today, meaning that sustainable agriculture practices that reduce the impact on climate change are deeply important. Specifically, emissions from the dairy sector needs to decrease. GDP is supporting the development of a new FAO study comparing the dairy sector's global emissions using the agency's data from 2005, 2010 and 2015. This paper, which is scheduled to be presented at the United Nations Framework Convention on Climate Change (COP24) meeting in Poland, will also detail changes in milk production and the underlying drivers of the sector's progress in reducing GHG emissions.

A man with dark hair, wearing a dark blue jacket and blue gloves, is kneeling in a barn. He is looking down at something on the ground, possibly a piece of equipment or a small animal. The barn is filled with hay, and the background shows wooden beams and fluorescent lights.

# Driving Leadership Dialogue

**The global food and health challenges the world is facing dictates that policy needs to change to support a sustainable food future.**

At the highest level, stakeholders have common goals and desire the same outcomes. We all want to ensure that food is produced in a responsible and sustainable way. Everyone supports strategies to eliminate poverty and global hunger by increasing access to nutrient-rich foods. Addressing issues and embracing opportunities are complex and multi-layered, however, and it is difficult to envision effective and equitable policies being made

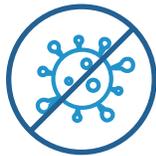
unless the sector's voices are heard and considered in the discussion.

The dairy sector is a powerful driver for implementing solutions to global health, climate, and development challenges. GDP is bringing dairy's expertise and perspective to various United Nations discussions on priorities such as climate change, sustainable agricultural, livestock practices, reducing non-communicable diseases related to poor diets, and eradicating poverty.

GDP Staff, Sector Leads, Dairy Ambassadors, and members present viewpoints and engage in global forums to raise awareness of dairy's nutrition, sustainability, and development efforts, with the overall goal of driving solutions to improve health, livelihoods, and support sustainable food production.

### **United Nations General Assembly and Non-Communicable Disease Prevention**

Globally, sustainable development is challenged by slow progress in preventing and reducing non-communicable diseases (NCDs). The United Nations General Assembly held a high-level meeting to undertake a comprehensive review of the prevention and control of NCDs, where the discussion of policy recommendations was framed around avoiding the "excessive intake of fats, in particular saturated fats and trans fats, sugars and salt." GDP organized a delegation of high-level experts to participate in the meeting to give voice to the most current evidence regarding the positive role of dairy foods in addressing NCDs.



### **United Nations High-Level Political Forum**

GDP Staff, Sector Leads, and Dairy Ambassadors participated at the United Nations' High-Level Political Forum (HLPF), which provided an opportunity to highlight the major roles dairy has in sustainable agriculture and poverty reduction. During the forum and in numerous side meetings with UN staff and Country Ambassadors, dairy representatives highlighted how the dairy sector is working to produce safe and nutritious products, while preserving natural resources and ensuring decent livelihoods.



### **International Symposium on Agricultural Innovation for Family Farmers**

Innovation is a driving force for transforming food systems, lifting family farmers out of poverty, and enabling sustainable agriculture. GDP coordinated the participation of a Dairy Ambassador at this symposium to provide knowledge and perspective on the socio-economic potential of innovation within the dairy sector, its key drivers and processes, and why it is critical to unlock its potential to achieve the transformative change required in agriculture and rural development.

### **The Future of Farming Innovation and Agroecology: A Path to Sustainability**

The term agroecology means the application of ecological concepts and principles to optimize interactions between plants, animals, humans and the environment, while taking into consideration the social aspects needed for sustainable and fair food systems. More recently, some groups have begun to co-opt the term to represent a movement toward no/low-input, anti-technology and anti-intensive farming. At the UN Committee on World Food Security 45th Meeting, GDP showcased innovation and technology as an



important part of agroecology, specifically highlighting anaerobic digesters ability to aid nutrient recovery and generate renewable energy from manure and food waste.



# Powering Collaboration

**Leveraging genuine partnerships that make the most of expertise, technology and resources among stakeholders is key to developing strategies for nutritional security, economic growth, social development, and combating climate change.**

World leaders are facing the challenge of feeding more people than at any point in history. Collaboration ensures world bodies and third-party groups take a holistic approach to defining sustainable food systems. Partnership creates the path for consensus on the way science should address healthy diets and the research needed to fill knowledge gaps. Working together

spurs innovation and maximizes capabilities to strengthen the sector's role in sustainable agriculture.

In that context, GDP's engagement in these joint efforts is crucial to identifying the sector's most significant opportunities for impact and establishing key action items. This is core to achieving the scale and sustained impact needed to deliver the United Nations Agenda 2030 and the Sustainable Development Goals.

GDP engages in multi-sector and multi-stakeholder collaboration to drive change and demonstrate impact, with the goal of addressing critical challenges and accelerating progress toward improved nutritional understanding, food security, and sustainability.

### **Dairy Sustainability Framework (DSF)**

As the DSF heads into its fifth year, indications are that the dairy sector is headed in the right direction in its sustainability journey. All the criteria now have High-Level Indicator Metrics, which will allow the collaboration to begin measurement reporting in 2019. Some 30% of world milk production is now reporting its sustainability activity via the DSF, covering over 44.6 million cows, 2.4 million farms and 4,505 processing plants worldwide. Growth in DSF membership from emerging dairy nations within the Dairy Asia partnership has the capacity to add nearly half of the world's population, and an additional 26% of global milk production.



### **Global Dairy Agenda for Sustainable Livestock (GASL)**

In conjunction with the IFCN Dairy Research Network, GDP has established an Action Network on Livestock for Social Development within GASL. Action networks in the GASL are multi-disciplinary, multi-stakeholder groups that provide evidence to support practice change for sustainable development at local, regional and global levels. This network is working to develop a robust evidence base on the role of dairy in social development. Additionally, it will provide tools and guidelines to assist stakeholders in assessing the contribution of dairy to desirable societal dimensions and measuring the benefits of investing in dairy to improve the sector contribution to social development.

Global Agenda for Sustainable Livestock



### **Dairy Research Consortium (DRC)**

As secretariat for the DRC, GDP facilitates collaborative efforts among six dairy associations on their precompetitive research projects. The DRC has initiated several research activities to further demonstrate health benefits associated with dairy consumption as part of a balanced diet. Currently underway is a human clinical trial to evaluate the potential health benefits of whole milk dairy products in relation to type 2 diabetes and cardiovascular risk factors. The DRC is also working with bone health experts to reaffirm the value of milk and dairy nutrients to bone health.



### **International Agri-Food Network (IAFN)**

GDP currently serves as the IAFN Chair, a collaboration which brings together international agricultural associations representing over 10,000 businesses worldwide in 135 countries. It is focused on a wide variety of issues relating to agriculture, food and nutrition. The IAFN serves as the focal point for the Private Sector Mechanism (PSM) of the United Nations Committee on World Food Security (CFS), where GDP also serves as Chair.





# Helping People Discover the Good

**Consumers have a lot of questions about where their food comes from, how it is produced and if it is good for their health.**

With smart technology and the desire to be constantly “connected” permeating our global culture, social media channels are among the primary sources of information sharing across the world. Yet increasingly in this age of “post-truths” and “alternative” facts, people are being exposed to content of questionable accuracy, if not direct misinformation, when it relates to dairy

nutrition, its effect of health, and its role in sustainable agriculture.

As “the Google effect” takes over the world and shapes more and more consumer perception, it is critical that the sector own its story and build trust as a responsible and sustainable food producer. Understanding the questions and concerns being searched for is creating the opportunity to deliver consumers and stakeholders effective information experiences.

With global leaders considering the many diverse issues surrounding the development of sustainable food systems and diets, GDP continues to focus on helping the sector raise its collective voice to tell its story - and celebrate - the good that happens every day around the world because of dairy.



### Sharing Dairy's Relevance

With nearly half of the world's population using social media platforms, they're a natural place to help people discover the good stories behind the dairy sector's work. A United Kingdom study found that more than half of adults do not trust corporate claims until they see "real-world proof" that those promises are being kept. GDP has redesigned both its website and social media platforms to provide not only the most current dairy related research, but highlight stories on how the sector is using technology, innovation and resources to improve the health and well-being of individuals, families and communities all over the world.

### World Milk Day

There is no denying the enjoyment that dairy can bring to special moments and to our favorite foods. World Milk Day is a great opportunity for consumers and the sector to celebrate dairy products, the joy they bring, and the sector's commitment to creating a better world. World Milk Day 2018 was again an incredible success, with 586 recorded events in 72 countries taking place over 42 hours around the world. #WorldMilkDay and #RaiseAGlass generated over one billion impressions on social media - a four-fold increase in impressions over the prior year. This led a great day for sharing dairy's story, as nearly a fifth of all World Milk Day conversation included references to nutrition, sustainability, or development.



### 9th Annual Global Dairy Marketing Meeting

GDP focuses on sparking the delivery of dairy's relevance story throughout the dairy sector by facilitating projects in conjunction with the International Milk Promotions Group (IMP). The organizations hold a global marketing meeting once a year to discuss how to better connect consumers and stakeholders to dairy's story. Similarly, silence is no longer an option when it comes to addressing misinformation on dairy being spread on the internet via search engines and social media channels. GDP facilitates sector discussions on best practices and formulas for sharing accurate information and perspectives.



Strength in Membership

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## 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.

### **Miles Hurrell**

Chief Executive Officer  
Fonterra Co-operative Group Limited

### **Minfang (Jeffery) Lu**

Chief Executive Officer and Executive Director  
China Mengniu Dairy Company

### **Hein Schumacher**

Chief Executive Officer  
Royal FrieslandCampina

### **Peder Tuborgh**

Chief Executive Officer  
Arla Foods amba

### **Dr. Margrethe Jonkman**

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

### **Dr. Judith Bryans**

President  
International Dairy Federation

### **Jerry Kaminski**

Chief Operating Officer  
Land O'Lakes, Inc.

### **Hanne Søndergaard**

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

### **Judith Swales**

Chief Operating Officer Transformation (Velocity) and  
Innovation  
Fonterra Co-operative Group Limited

### **Jay Waldvogel**

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

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## **Global Dairy Platform Leadership Team**

### **Donald Moore**

Executive Director

### **Jerreau Beaudoin**

Communications Director

### **Amanda Slusher**

Office Manager

## **Global Dairy Platform Sector 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

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## 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  
Danone, France  
DMK Deutsches Milchkontor, Germany  
Fonterra Co-operative Group Limited, New Zealand  
General Mills, France  
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  
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Palmhouse Dairies, Kenya  
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  
Volac International Ltd., United Kingdom

### Associate Members

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

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## NON-PROFIT MEMBERS

American Dairy Products Institute, United States  
Australian Dairy Products Federation, Australia  
Belgian Dairy Federation, Belgium  
British Cheese Board, 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 Farmers of Ontario, 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, Republic of Korea  
Korea Dairy Industries Association, Republic of Korea  
Korean Society of Dairy Science and Technology,  
Republic of 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 (FETALE), 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

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**GLOBAL DAIRY PLATFORM**

**GLOBAL DAIRY PLATFORM** leads a collaboration of dairy companies, associations, scientific partners and other bodies in promoting the necessary intake of nutrient-rich dairy products, building evidence of dairy role in the diet, and showing the sectors commitment to responsible and sustainable food production. Together, we aim to demonstrate dairy's contribution to global food systems, healthy diets and sustainable livelihoods.

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