

Report on participation in the
WORLD DAIRY SUMMIT
and **BUSINESS MEETINGS** of the
INTERNATIONAL DAIRY FEDERATION
in Istanbul, Turkey - September 2019



“Milk for Life”



THE INTERNATIONAL DAIRY FEDERATION & WORLD DAIRY SUMMIT



AN INTRODUCTION

The International Dairy Federation (IDF) represents the global dairy sector and ensures the best scientific expertise is used to support high quality milk and nutritious, safe and sustainable dairy products.

IDF's vision is to help nourish the world with safe and sustainable dairy. The growing world population needs nutritional security, and we must provide this both safely and in a sustainable manner. IDF provides a mechanism for the dairy sector to reach global consensus on how to help feed the world with safe and sustainable dairy products. As the peak body for the global dairy sector, IDF has an important role to play in ensuring the right policies, standards, practices and regulations are in place to achieve this goal. In close cooperation with the International Organization for Standardization (ISO), IDF has established a joint IDF/ISO work programme for the development of standard methods of analysis and sampling for milk and milk products. IDF also has working relationships with several global intergovernmental organizations, and has a formal status with the Food and Agriculture Organization of the United Nations (FAO), World Organization for Animal Health (OIE) and the Joint FAO/WHO Food Standards Programme – Codex Alimentarius.

The IDF World Dairy Summit (WDS)

This event is an annual meeting of the global dairy industry with more than 2 000 participants from all over the World.

The participant profile includes CEOs and employees of dairy processing companies, dairy farmers, suppliers to the dairy industry, academicians and governmental representatives etc. The Summit is composed of a series of scientific and technical conferences, social events including a welcome reception, farmers dinner, gala dinner, technical and social tours.

The IDF World Dairy Summit is a unique opportunity for industry experts to share their knowledge of dairy. Participants gather to network and familiarize themselves with the latest research findings and experiences relevant to the global dairy sector in the broadest sense.

Message from the President of IDF



IDF plays a key role in helping the global dairy sector feed the world with safe, sustainable and nutritious dairy products. Acting with global consensus, and working in partnership with intergovernmental organizations and key stakeholders, IDF continues to ensure that the right standards, policies and practices are in place to help the sector deliver. Our scientific knowledge and technical expertise is widely recognized and respected and that allows us to represent our sector widely and with authority.

People always tell me they value the IDF network and for me that is great to hear. I know our network is second to none and efficiently connects experts across many fields across the globe every day of the year. However, during our World Dairy Summits, the benefit of this network is on display for the world to see.



Discover Turkey

A country steeped in history and culture, the Turkish Republic occupies a unique geographic position, lying partly in Asia and partly in Europe.

Throughout its history it has acted as both a barrier and a bridge between the two continents. Because of this geographical location, the mainland Anatolia has witnessed the mass migration of diverse peoples, shaping the course of history. Home to countless civilizations, Anatolia has developed a unique synthesis of cultures, each with its own distinct identity, yet each linked to its predecessors through insoluble threads. As a modern nation in an ancient land, Turkey today is the inheritor and conservator of such an essential, shared heritage of humanity.

Turkey is also quite unique, in that Turkish culture is a mix of Ottoman and western influences. While Turkish lifestyle is a vivid mosaic, mixed with the ancient and the modern, hospitality is a cornerstone of Turkish culture, and Turks believe that visitors should be treated as Guests sent by God. There is no doubt that one visit will not be enough, and you will want to come back again and again as you discover one extraordinary place after another. All of them, no matter how different, have one thing in common: The friendly and hospitable people of this unique country.

Turkey, officially the Republic of Turkey, is a transcontinental country located mostly in Anatolia, Western Asia and East Thrace in South-Eastern Europe. Besides being a unitary parliamentary republic, Turkey is a democratic, secular, constitutional country with a diverse cultural heritage. Although Istanbul is the most popular and populous city in Turkey - contrary to popular belief - Ankara is actually the capital.

Agriculture and Food in Turkey

Home to the headwaters of the Tigris and Euphrates Rivers, Turkey's agricultural sector today echoes the prosperity of ancient Mesopotamia. With its favorable geographical conditions and climate, large arable lands and abundant water supplies, Turkey is considered to be one of the leading countries in the world in the field of agriculture and food. Turkey has a robust agriculture and food industry that employs almost 20 percent of the country's working population and accounts for 6.1 percent of the country's GDP in 2016. The sector's financial contribution to the overall GDP increased with 40 percent from 2002 to 2016, reaching USD 52.3 billion in 2016.

The strengths of the industry include the size of the market in relation to the country's young population, a dynamic private sector economy, substantial tourism income and a favourable climate.

Turkey is the world's 7th largest agricultural producer overall, and is the world leader in the production of dried figs, hazelnuts, sultanas/raisins, and dried apricots. The country is also one of the leading honey producers in the world. Turkey boasted a production of 20.7 million tons of milk in 2017, making it the leading milk and dairy producer in its region. The country also saw production totals of 35.3 million tons of cereal crops, 30.3 million tons of vegetables, 18.9 million tons of fruit, 1.9 million tons of poultry, and 1.2 million tons of red meat. In addition, Turkey has an estimated total of 11,000 plant species, whereas the total number of species in Europe is 11,500.

This bountiful production allows Turkey to maintain a significantly positive trade balance thanks to its position as one of the largest exporters of agricultural products in the Eastern Europe, Middle East, and North Africa (EMENA) region. Globally, Turkey exported 1,781 kinds of agricultural products to more than 190 countries in 2016, accounting for an export volume of USD 16.9 billion.

Turkey is looking to position itself as the preferred option for being the regional headquarters and supply centre of top global players in the agricultural sector. To encourage investment in the sector, Turkey offers a set of incentives for potential agribusiness investors.

According to McKinsey and Co., Turkey offers significant investment opportunities in agribusiness subsectors such as fruit and vegetable processing, animal feed, livestock, poultry, dairy, functional food, fisheries, and enablers (in particular cold chain distribution, greenhouses, irrigation, and fertilizer).

INDEX

6

Report by
MELT LOUBSER



9

Report by
ALWYN KRAAMWINKEL



12

Report by
DR KOOS COETZEE



19

Report by
CHRISTINE LEIGHTON



28

Report by
MARETHA VERMAAK



38

Report by
JOMPIE BURGER



42

Report by
DR COLIN OHLHOFF



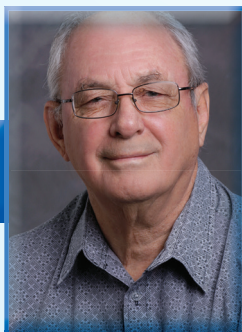
45

Report by
STEPHANUS STEYN



53

Report by
EDU ROUX



62

PICTURES

PREFACE

The 2019 Summit of the International Dairy Federation (IDF) took place in Istanbul, Turkey from 23 to 26 September. The theme of the conference was “Milk for Life”

Melt Loubser	President SANCIDF; Milk SA director; SAMPRO Chairperson; Delegate to the General Assembly of IDF
Dr. Chris van Dijk	Vice President SANCIDF; CEO MPO; Member SC Animal Health and Welfare (No written report. Presented summary of whole Summit to Milk SA General meeting)
Alwyn Kraamwinkel	IDF director; Milk SA director; SAMPRO CEO; Member SC Dairy Policies & Economics
Dr Koos Coetzee	Member of IDF Science & Program Co-ordinating Committee; Member SC Farm Management
Christine Leighton	Member SC Marketing; Chairperson: International Milk Promotion Group; Project Co-ordinator: Milk SA Consumer Education Project;
Maretha Vermaak	Member IDF Science and Program Coordination Committee; Member SC Nutrition and Health; Milk SA Consumer Education Project
Jompie Burger	Member SC Standards of Identity and Labeling; Managing Director Dairy standard Agency; Dairy Standard Agency Regulations and Standards Project of Milk SA; Project Manager Regulations and Standards Project of Milk SA
Dr Colin Ohlhoff	Member SC Environment; Member of Milk SA's Research & Development Committee
Stephan Steyn	President SA Society of Dairy Technology
Edu Roux	National Secretary, SANCIDF

We trust that this report will provide insight into the amount of knowledge that is generated and shared within the international dairy community and that the reader will gain some food for thought pertaining to his or her position in the SA dairy industry.



Report by MELT LOUBSER



GENERAL

This general feedback report might add value to official discussions between IDF and SANCIDF. IDF is an organization that deals with the challenges common to the global dairy industries. It is a world dairy asset of vital importance.

The scientific approach to issues, the collaboration with world standard setting bodies including WHO and FAO, its collaboration with and consultation to Codex, the scientific collaboration with GDP and the brand of IDF as the leading authority on dairy matters, are some of the reasons highlighting the importance of this federation. The value that IDF adds to Dairy Industries of the world comes at a fraction of the cost of what it would be if individual countries were to deal with common challenges on their own.

The South African Dairy Industry has been a long standing full member of IDF and we shall strive for this to continue into the future. South Africa is an active participant in the workings of IDF via its involvement in the standing committees, the board of directors, its role in the scientific programmes and the willingness of South Africa to act as host for the yearly World Dairy Summit in 2012 and again in 2020.

ANNUAL GENERAL MEETING

The AGM took place as scheduled with most member countries present. As international President of IDF, Dr Judith Brown handled the meeting with a great deal of ease and her report on the activities of IDF for the past year was informative. It is clear from the reports that she remains highly devoted to IDF and various trips were made by herself in order to strengthen the relationships between IDF and other member and potential member countries.

Last year it was indicated in my report that fiscal discipline seem to be lacking in some instances and we engaged the AGM on this issue. IDF needs to operate within the constraints of the budgets and when you look holistically at the budgets, the organization moves very close to the edge, with very little or almost no reserves. The financial performance of 2018 ended with a loss of 384000 Euro which was approved by the Members. However the statement of cash flow as well as the Balance sheet statements were not included as part of the financial information. This made it difficult to judge the liquidity. The assurance was given that enough reserves were available in order to finance the loss.

The budget for the 2020 financial year was approved with the following comments, some of which were raised by mainly South Africa and others will be conveyed to the head office in writing:

- The rounded up nature of this budget raised questions as to the attention to detail and whether this was a budget drawn up from first principles or, merely a copy and paste exercise from the previous budget.
- Staff costs increased by 31% since 2016 which make the 2% increased staff allowed for in the 2020 budget challenging. It was also noted that huge variances occur between the budgeted costs for staff salaries and social grants.
- Travel costs increased by 81% since 2016. The actual numbers deviated in the last financial year with 28% and questions were raised regarding travel policies and procedures and the process followed when this type of deviation occurs.

- Variable office costs increased with 28% since the forecast for 2018.
- Other charges totalling 100000 Euros for 2018 were noted. These expenses were not budgeted for and the detail of these expenses were not informed by the agenda.
- As a general remark it was noted that overall expenses increased by 21% since 2017. This is more than the increased income from member countries.
- Other income for the 2019 and 2020 financial years was sourced from a subsidy from the EC Horizon 2020 project (Disarm). This is a form of grant from the EU and it was noted that the income and expense from this grant need to be ring-fenced. Currently the income and expenses form part of the budget and can be frowned upon by the EU if the proper accounting principles were not applied.

I was informed that the Board of Directors regarded the comments by South Africa as important and that the comments were discussed during a meeting of the Board of Directors which took place the day after the General Meeting.

The above commentary will be provided to the IDF head office for their comment.

We should also consider the position of a vice chairperson for the Board of Directors of IDF and that an executive committee consisting of the Chairperson, Vice Chairperson, Director General and Treasury be appointed to manage critical issues by means of a monthly teleconference or something similar.

There were comments from member countries that the difference in payment between the big dairy producing countries and the smaller ones was not sufficient. This is an ongoing issue and open for further discussion. All members irrespective of milk volumes enjoy the same voting rights and other privileges as a full member but the variance in membership fees ranges from 60 Euro cents to 1 200 Euro cents per kiloton of milk produced.

South Africa formally invited the AGM to the WDS2020 in Cape Town. The invitation was received with huge enthusiasm and with ample commitments from members who wish to attend this event. The WDS2012 is still held in very high regard and remembered by many participants as a most successful summit.

OPENING CEREMONY

I regarded the opening ceremony as average with the minister of agriculture as the main speaker.

Other activities at this opening event were not noteworthy.

WORLD LEADERS FORUM

The World Leaders Forum was interesting, but great care must be taken to ensure that participants in this event remain objective and are not merely extensions of their business objectives. This fact was also noted at past events, but it was extremely obvious this year. Other observations include the fact that there was strong emphasis on the impact of subsistence farming, with India and Kenya two of the six speakers at WDLF.

For WDLF in South Africa next year we need to have a different format. Preliminary discussions concluded that we need to formulate five questions on the leading topical issues on the World dairy scene with the appropriate speakers tasked to answer these.

OTHER SESSIONS

The attendance by South Africans of all parallel conferences was good and great care was taken to split delegates from South Africa for maximum take-out from these sessions. This will be visible in the reports to Milk SA and SANCIDF by delegates who attended the sessions and will contribute to the knowledge base of our industry.

A general observation at this summit was that the summit programme did not provide for sufficient attention to specialized content in respect of the different relevant disciplines. The number of sessions were not enough to warrant the cost of travelling to these events. The programme committee for the WDS2020 will have to take note of this. The interaction between the audience and the speakers was also dismal as a result of no time allocated to questions from the floor directly after the presentation. The plenary sessions at the end of the day were not an effective means to create participation from the audience.

The prominence accorded to environmental and animal welfare issues, which also informs the hype on plant based versus animal based nutrition, remains very topical and will continue to be in the future.

Milk SA will have to intensify its focus on issues of environmental and animal welfare, including the nutritional debate on plant based versus animal based nutrition.

Good interaction existed between the exhibitors and the conference due to the fact that these stands were located in such a position that interaction was facilitated. Exhibitors are a good source of income for the event, add value due to the innovative and latest technology displayed, and serve as a platform for further discussion and learning. Exhibitions remain an interesting part of the summit and well deserving of additional focus.

GALA DINNER

It was a successful and classy event. South Africa received the key to the World Dairy Summit 2020. It remains of vital importance to balance the programme between cultural activities and activities of a more cosmopolitan nature which can be enjoyed by all participants. It should also be ensured that the meals are served hot.

OTHER OBSERVATIONS

The conference facilities were of a very high standard and I am convinced of the importance of having the conference in a facility where all activities can be accommodated in one. The attendance in general of this Summit was slightly better than in South Korea, but still disappointing. We need to ensure that the content of our scientific programme is such that it will add to maximum stimulation for attendance of the conference.

It became very clear that the geographical location of the event is of paramount importance and the decision of the Organizing Committee to host the 2020 summit in Cape Town is strategic and one which will play a substantial role in drawing interest to this event.

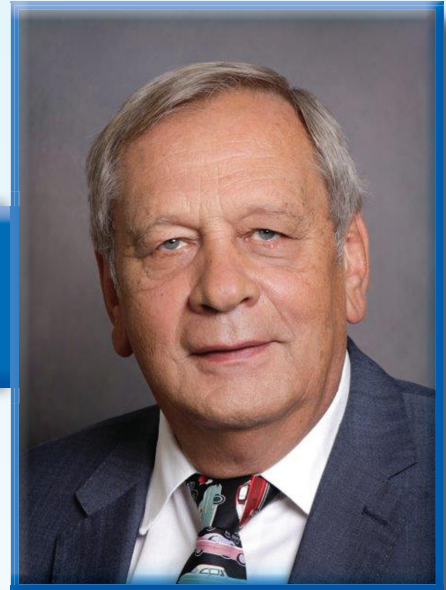
I also observed the impersonal format of interactive sessions during sessions. Delegates could pose their questions via a website where after the chairperson of the sessions could decide which of the questions to pose to the speaker panel. It will be vital for the Organizing Committee to strike a balance between live participation from the audience and the speaker panel. The previous conference in Belfast can add to finding this balance.

Reflecting on the conference as a whole strengthens my view that IDF plays a critical role in the world dairy situation. It is difficult to always find words to report on the overall magnitude of such an event. Detailed reports from delegates will highlight detail on the intellectual side, but there is huge undocumented value in the gathering of the world dairy fraternity, the social interaction, after hour discussion and in general the combining of like-minded individuals.

The South African dairy industry only stands to benefit from the association with IDF. The current arrangement via the funding of membership fees through Milk SA remains excellent value for money as are the various sponsorships for attendance by South African delegates of the World Dairy Summits from Milk SA, SANCIDF, various projects of Milk SA as well as the reserve fund created from the profits of the 2012 IDF World Dairy Summit in Cape Town.

It was a privilege for me to attend this event and I look forward with great anticipation to the 2020 World Dairy Summit in Cape Town.

Report by ALWYN KRAAMWINKEL



INTRODUCTION

1. The meetings of the Board of Directors of IDF, Standing Committees of IDF, the World Dairy Summit of IDF and the meetings of the Global Dairy Platform (GDP) took place from 19 September 2019 to 26 September 2019.
2. The undersigned attended and/or participated in the following meetings:
 - Board of Directors of IDF
 - Annual General Meeting and other meetings of the Global Dairy Platform (GDP)
 - Standing Committee of Dairy Policies and Economics
 - Standing Committee on Marketing
 - Meeting of Chairpersons of Standing Committees, Science Programme Coordinating Committee, IDF personnel and Board of Directors of IDF
 - General Assembly of IDF
 - Most sessions of the World Dairy Summit
3. Different issues, which are of major importance in respect of the future development of the international and South African dairy industries and which can only be dealt with through collective efforts of different countries, were attended to during the 2019 Summit.
4. The issues referred to in the previous paragraph, included:
 - The international dairy market
 - Policies of different countries in respect of their dairy industries
 - The nutritional value of dairy products versus that of plant based food products
 - The environmental impact of the dairy industry versus that of the production of plant based food
 - Animal Welfare
 - Use of anti-microbial agents
5. The development of the dairy industry in Africa received prominent attention in more than one event.
6. The management and administration of IDF received detailed attention in the General Meeting of IDF and meetings of the Board of Directors of IDF. The President of the South African IDF made major contributions in the General Meeting regarding the need for greater transparency and financial discipline.

7. The major messages from the IDF 2019 World Dairy Summit included the following:

- The international trade dispensation is marked by uncertainties created by:
 - Trade dispute created by the President of the USA;
 - The position of the United Kingdom in respect of the EU;
 - The trade restrictions in respect of Russia; and
 - The future impact of new and envisaged trade agreements.

Notwithstanding, the expectation of the OECD/FAO is that the dairy industry in the world will grow in the next decade.

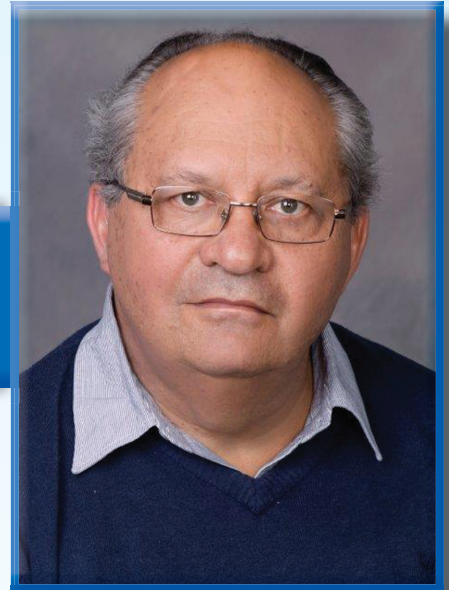
- Production orientated views, with the implied objective of maintaining the status quo regarding the structure of the industry, remain an important building block of the policies of particular countries. This approach is very visible in respect of low income countries, as well as in respect of particular high income countries and it often coincides with restrictions on imports and high ambitions to export. For example, India do not want foreign competition in their domestic market (in order to protect the existing structure of their dairy industry), but representatives of India were, during the Summit, very vocal about their ambition and future ability to export dairy products.
 - The nutritional value of dairy products remains under attack and different and high level work is conducted by the IDF, as well as the Global Dairy Platform, and other organizations to deal with it. Similarly, work is conducted in respect of the nutritional value of dairy products in comparison with that of plant based food and perceptions of consumers about it.
 - While the impact of the dairy industry on the environment received high profile attention in the news media, (often based on views not supported by sound scientific information), less attention is given to the role of the dairy industry in respect of carbon sequestration, as well as to the impact of the production of plant based food on the environment. Important work is conducted in respect of these issues.
 - The importance of consumers' perceptions regarding animal welfare, is increasing continuously. To deal with this matter, it is in the first place necessary to have standards about what constitute animal welfare. The updated "Guide to Food Animal Welfare in Dairy Production 2.0" of the IDF sets appropriate standards which are in harmony with the South African National Standard: The Welfare of Dairy Cattle, published in the last quarter of 2018. The challenge to the dairy industry is not only to commit to compliance with the standard, but also to prove compliance through independent audits.
 - As in the case of animal welfare, the spotlight is increasingly on reduction in the use of anti-microbial agents by the producers of raw milk.
8. During a meeting of the Global Dairy Platform and as part of the IDF Summit, the dairy industry in Africa and specifically, the planned development of Tanzania as a dairy producer and future exporter, were the subjects of presentations. Two well-known European dairy companies are excited about their understanding or agreement with the government of Tanzania about the development of the dairy industry in Tanzania, involving a huge number of small raw milk producers. Questions about the viability of such a plan exist. For example, as only 30 percent of the estimated raw milk production of Tanzania is used for the production of dairy products (See Annexure A), the issue in Tanzania is not lack of raw milk production, but lack of production of dairy products and which simply means, the absence of a market for the envisaged additional production of dairy products in Tanzania. The quantity of raw milk consumed in a country, is not an indication of the size of the market for dairy products, as the prices of dairy products are, due to value adding, considerably higher than that of raw milk (and thus the size of the commercial market for dairy products will be smaller than the estimated production of raw milk) and as it is reasonable to assume that a large part of the estimated production of raw milk in Tanzania, (which is, as indicated in Annexure A, much higher than the production in South Africa) is used by the raw milk producers concerned, for own consumption.

Particular information in respect of 2017 regarding the dairy industries of the African Countries participating in the International Farm Comparison Network (IFCN)

Country		Total population (million)	Total Production of Raw Milk Ton (million)	Raw Milk Processed		Raw Milk Production per cow Ton per year	Per capita consumption Kg per year
				%	Ton (million)		
1.	Algeria	41.5 ⁶	2.03	47	0.9541 ⁶	6.77 ¹	137.8 ²
2.	Cameroon	24.3	0.26	3	0.0078	0.63	18.2
3.	Egypt	72.2 ³	9.26 ¹	14	1.2964 ⁴	2.19 ⁴	105.4 ⁵
4.	Ethiopia	77.1 ²	3.54 ⁵	2	0.0708	0.29	42.6
5.	Gambia	1.49	0.07	7.7	0.00539	1.39	54.4
6.	Kenya	34.7	4.47 ⁴	15	0.6705	0.73	122.9 ⁴
7.	Malawi	14.0	0.05	52	0.026	63.00 ⁷	10.1
8.	Morocco	34.85	2.59	65	1.6835 ²	1.44 ⁶	94.0
9.	Mozambique	21.7	0.79	16	0.1264	1.39	29.7
10.	Namibia	1.99	0.11	22	0.0242	0.44	76.1
11.	Nigeria	188.7 ¹	0.54	52	0.2808	0.12	6.5
12.	Rwanda	9.0	0.77	39	0.3003	1.35	73.7
13.	Senegal	16.09	0.20	8	0.016	0.22	20.3
14.	South Africa	48.21 ⁵	3.49 ⁶	96	3.3504 ¹	5.67 ²	60.4
15.	Sudan	36.2	7.39 ²	12	0.8868	0.57	241.0 ¹
16.	Tanzania	49.61 ⁴	4.52 ³	30	1.356 ³	1.61	95.6 ⁶
17.	Tunisia	11.34	1.36	76	1.0336 ⁵	2.15 ⁵	131.4 ³
18.	Uganda	37.7	2.30	29	0.667	0.38	58.6
19.	Zambia	12.38	0.44	16	0.0704	0.27	26.9
20.	Zimbabwe	14.9	0.06	97	0.0582	3.60 ³	6.5

Note: The above information was obtained from the “Dairy Report 2018” of IFCN. Some information is most likely inaccurate like the production per cow of Malawi. The figures about total production, are estimated figures of IFCN, which may differ from the reality. The figures in red, indicate the first 6 highest recorded figures per variable.

Report by Dr KOOS COETZEE



1. INTRODUCTION

IDF held its 2019 World Dairy Summit in Istanbul, Turkey from 19 to 26 September 2019. As usual different business meetings preceded the conference. I attended the business meetings and conference.

2. BUSINESS MEETINGS

2.1 Science Programme and Coordinating Committee (SPCC)

SPCC is an elected committee of IDF. I represent farm management on SPCC. While the SPCC meeting largely handled procedural issues, we discussed some aspects of general interest.

Protein from dairy perspective

IDF did a great deal of work to provide science-based background for the meeting of Codex on protein conversion factors for dairy products. Codex meets on 19 November and delegates should interact with their national representatives on Codex before the meeting.

Plant-based beverages

Plant-based beverages are a real threat to the dairy industry. Since 2018 the Standing Committee on Marketing (SCM) and the International Milk Promotion Group (IMP) developed a comprehensive communication strategy and plan for the dairy industry to address the issue of plant-based beverages. The current plethora of plant-based beverages confuses the consumer. The strategy plans to provide the consumer with science-based, factual information about plant-based beverages. The strategy will highlight the following facts:

1. Plant-based beverages are inferior
2. Milk matrix provides natural nutrition
3. Dairy products provide health benefits that are science-based

National dairy industries will use the comprehensive global strategy to design and implement local plans to inform role-players about plant-based beverages. The next phase of this project will include other imitation dairy products.

Other projects

SPCC discussed the following projects

1. Knowledge platform on chemical contaminants
2. Alignment between the Codex General standard of Food Additives and the milk and milk product commodities standards
3. Codex work on front-of-pack labelling/nutrient profiling
4. Sustainability and Reporting on Dairy Declaration of Rotterdam
5. Mapping out School Milk Programmess worldwide

Priority items for 2019/2020

SPCC members scored current projects with a balanced score-sheet. Following are the priority items for 2019/2020:

1. Front of pack labelling
2. Align Codex dairy and Codex general standards
3. IDF Input to Codex Antimicrobial resistance taskforce
4. Knowledge platform for contaminants

2.2 Standing Committee on Animal Health and Welfare (SCAHW)

Work in progress

1. Mastitis definitions
2. Guidelines for the use of sensors for health
3. DF Para tuberculosis conference in June 2020
4. Interpretation of Somatic Cell Count in goats milk

Other issues

Animal welfare issues were discussed. Animal rights activists are putting more pressure on dairy farms to keep calves with cows. The committee identified the need for a comprehensive communication strategy for animal health and welfare.

The Committee are looking for a venue for the 2023 Mastitis Conference.

2.3 Standing Committee on Farm Management (SCFM)

Project on pro-active management of chemical contaminants

The purpose of this project, managed by K Kraehenbuehl (CH), is to identify and develop guidelines for the management of chemical contaminants in dairy production. A questionnaire will be sent to national committees in October 2019. A list of possible contaminants was provided. The following groups of contaminants were listed:

1. Disinfectants
2. Contact materials
3. Veterinary drugs
4. Vermin control
5. Pesticides
6. Environmental contaminants
7. Toxins
8. Additives
9. Other

The Committee discussed the different risk materials. While a few contaminants such as antimicrobials are more prevalent, these are well monitored and managed. The Task team will develop both general facts sheets and a more comprehensive technical paper on this subject.

IDF involvement with dairy farmers

The Farm Tour, Farmers Round Table and Farmers Dinner are planned to provide specific content for farmers at the Summit. Two dairy farms were visited. Participants suggested that a roving microphone should be provided on the bus, that more information on the specific farms visited be provided and that a fact sheet on the dairy industry be provided. The farm tour is exclusively for dairy farmers.

Communicating animal welfare to the public

Various animal welfare issues are not understood by the public. For instance in Nordic countries, society is increasingly protesting against the separation of cows and calves directly or soon after birth. Studies are done to determine the

feasibility of keeping calves with cows for longer periods. SCFM members propose working jointly with SCM on the development of a communication plan for animal welfare issues.

Other business

The fact sheet on reproduction technologies will be published soon. The work of a group with the purpose of providing information on solutions for the management of antimicrobial resistance called DISARM (Dissemination of Innovative Solutions for Antibiotic Resistance Management) was commended to the Committee.

Codex work on Antimicrobial Resistance. SCFM's involvement is discussed.

2.4 Dairy Farmers' Round Table

Fifty farmers from different countries attended the Dairy Farmers Round Table. Various issues of interest to the different farmers were mentioned and discussed. The following issues were highlighted:

1. Climate issues and government carbon regulations
2. Nitrogen cycle
3. Drought (Kenya)
4. Animal activism

3. WORLD DAIRY SUMMIT 2019

3.1 Dairy leaders forum

General impression

As in the past the speakers at this forum spent their time to inform the delegates about their own companies and spent very little time in addressing the major issues facing the dairy sector in future. For our 2020 conference it may be better if we use general thought leaders to address issues in this forum. The following are some of the statements made by the speakers.

Pinar Dairy

Pinar dairies take in milk from 18 000 dairy farmers in their three factories. They provide a base price and regular payments to farmers. Products include Kefir, protein milk and protein enriched yoghurt. Producers are mostly small-scale farmers and Pinar provides the farmers with training.

Arla Foods

Arla is a global company with more than 13 000 farmers delivering milk to them. They have a slogan of "Creating the future" They focus on sustainable diets, climate issues, carbon sequestration, precision farming methods, innovation and moving over to the use of renewable energy sources. They switched to green packaging and try to limit food waste. They will be carbon neutral by 2050.

Friesland Campina

Friesland Campina is an international company with facilities in 34 countries, revenue of Euro 11,6 billion, and 23 000 employees. Eighteen million farmers are members of Friesland

Campina

The world will have to feed an extra 2 billion people in 2050. Dairy products provide high density nutrition. They use innovation to develop sustainable diets and attempt to provide a good living for farmers. They provide training and run global dairy development programmes.

Junlebao Dairy, China

A fast growing company in a fast-growing market. Sixteen million babies are born in China every year. More than 400 million Chinese are already part of the middle-class.

Amul, India

The Indian dairy market grew by 4,5% per year over the last fifteen years. The growth is caused both by population growth and growth in per capita consumption. The Indian model consists of three levels of cooperatives, a village cooperative collection centre, district cooperative and state cooperative. Small-scale farmers are accommodated in this system.

Palmhouse Dairies, Kenya

Kenya allegedly produces 5 billion litres of milk per year. However only about 20% of their total production reaches the market.

3.2 Dairy Outlook 2019 – 2020

World Dairy Situation report 2019

Melanie Richard, Head of Economy at CNIEL presented the 2019 IDF World Dairy Situation report. This 200-page flagship publication of IDF provides an overview of the dairy sector in over 50 countries around the world and contains a wealth of information including a comprehensive set of dairy industry statistics and insight on the wide range of policies, analyses and economic factors influencing the sector.

Global milk production grew by an average of 2,2% from 2010 to 2018 and is expected to grow by 2,5% to 864 million tonnes in 2018 and by a lower 1,8% in 2019. Per capita consumption increased from 112,2 kg per person per year to 113,7 kg/p.c. in 2018. Both per capita consumption and population growth drive demand growth. Forty-seven percent of total milk production is used in the informal market, 16% as fresh milk and fresh milk products, 14% as cheese, 4% full-cream milk powder, 3% skimmed milk powder, and 1% others. Dairy consumption is expected to grow by 1,7% per year from 2015 to 2028, with slower growth (0,8% CAGR) in developed and faster growth (2,3% CAGR) in developing countries. The European Union (28%), New Zealand (25%), USA (15%), Australia and Belarus (5% each), Argentina (2%) and Uruguay (2%) are the major dairy exporting countries.

Dairy sector in Turkey

There are 500 000 “dairy” farmers in Turkey, producing 22,1 million tonnes of milk from 17 million cows. Forty-eight percent of total milk production is supplied to processors (IFCN 2019). Typical dairy products are kefir, torba (concentrated yoghurt), and ayran (butter whey).

OECD Agricultural Outlook 2019 - 2028

According to the FAO-OECD Agricultural Outlook 2019 – 2028 dairy product prices will remain positive for the next decade. The gap between milk fat and other solid prices will probably continue. FAO-OECD projections are more positive for cheese and butter than in their 2018 forecast.

Global consumer trends

There is a proliferation of non-dairy products on the market. Major trends that are shaping dairy markets are:

1. Digestive wellness – great opportunity
2. Plant-based food sector is growing
3. Protein carries a “natural halo”
4. Sugar – sweeteners are reinvented
5. Good carbs, bad carbs. Carbs are nudged into new directions
6. Fragmentation of the market into a plethora of niches
7. Snackification – moving towards extreme convenience
8. New interest in novel beverages
9. Fat is back in favour
10. Authentic stories are important

In a survey amongst IDF members they indicated that health/nutrition, animal welfare and environmental/climate concerns were the major issues in the anti-dairy debate, followed by the perception that milk is not a natural food for humans. Soy and almond based products were the main non-dairy products in most countries. Most countries perceive the advertising for non-dairy products as aggressive.

The following global trends are shaping markets:

1. The global perspective on sustainable food systems influences national dietary guidelines, without proper consideration of its impact.
2. The plant-based food movement has reached policy-level prominence with influential health and government groups.
3. Nutrition may be losing its position in the sustainability discussion.
4. Children's nutritional needs are overlooked in the discussions about other food and health concerns.
5. Research continues to illustrate how dairy can provide health benefits, disease prevention, and bone development.

Consumers limit dairy consumption as they fear that it is fattening and seek alternatives to avoid allergies and digestive issues. Concern for the environment and general distrust of corporations also drive anti-dairy campaigns.

IFCN Dairy Outlook 2020

IFCN identifies two so-called magic moments in the global dairy industry, the first when in 2016 the prices of protein and fat moved away from each other and the second in 2017 when prices shifted to a new lower level.

In 2018 global milk production grew by 16 mil. tonnes (+2,4%). IFCN expects slower growth of 1,1% in 2019 and estimate growth of 2,1% in 2020. Milk production growth in 2019 is at a record low, comparable to 2013 and 2016. Future markets point towards a global producer price of about US\$ 38 – US\$39/ 100 kg milk for 2020. IFCN expects a price of about US\$ 35 – US\$ 38/ 100 kg milk in 2020. Based on an expected rand/Dollar exchange rate of R15,00 per US\$, this is equal to a producer price of R 5,10 to R 5,50 per litre in South African terms.

3.3 Dairy as a nutritional base to feed the world

Introduction

The modern dairy industry started in the 1900's when pasteurisation made it possible to process and distribute milk. Currently 170 million dairy farmers, owning 273 million dairy cows produce 860 million tonnes of milk. The global dairy industry has a turnover of US\$ 450 billion and this grew by a calculated annual growth rate of 5% per year. The global dairy sector provides one glass of milk to each person on earth. In Europe, Oceania and North America people consume on average 2,5 glasses of milk per day. In Africa and Asia people only consume about a quarter glass of milk per day. The main reasons are cultural issues, climate, low genetic potential of animals, inadequate number of farms and lastly biological reasons like lactose intolerance.

There are more than 815 million people in the world suffering from chronic undernourishment, 3,5 million children die from undernourishment and an estimated 150 million children below 5 years of age are stunted. Globally poverty is the main reason for hunger. Dairy farming can provide household food security.

Co evolution of dairy products with society and sustainability

The anti-dairy lobbies attack the dairy industry in various ways. People for the Ethical Treatment of Animals (PETA) recently targeted school children with a campaign that show how drinking milk will make them obese, let them drown in their own phlegm and will make them spotty. They handed out cards showing this at schools. Mothers are targeted with advertisements showing how dairy calves are taken away from their mothers and how artificial insemination is actually rape. They even use lactose intolerance amongst African Americans as a way of trying to prevent people from using dairy products. Greenpeace has repeatedly called for a reduction in dairy consumption to "save" the world. Food processing companies use the anti-dairy campaigns as a springboard for their advertising.

Role of agriculture in providing nutritious diets

The Bill and Melinda Gates Foundation provides support to developing agencies and government in various countries. Their aim is to move towards a world where every person has the chance to live a healthy, productive life. In Africa they are involved in Ethiopia, Nigeria and Tanzania. A strategic goal is to provide a safe, affordable, nutritious diet all year round. This is done by focussing on small-holder farms. They believe that investing in livestock production as a key lever for the development of agro-food systems. They have proof that livestock ownership results in better nutrition for rural people in Ethiopia. Closing the dairy productivity gap between high producing largely first world countries and developing countries is a key requisite for the development of less developed communities. They are involved with the East African dairy development program in Kenya, Uganda and Tanzania to improve income for more than 300 000 dairy farmers. In all their programmes the focus is on small-holder farmers.

Practical nutritional solutions

The dairy industry's foundation is a nutrient dense product. One glass of milk contains the same quantity of protein as one egg, the same quantity of calcium as 365 gram of broccoli, the same quantity of vitamin B2 as 25grams of almonds, vitamin B12 as in 48 grams of beef. Friesland Campina reduced the salt and sugar content of their products significantly. In a large survey in South East Asia it was found that children who regularly consume dairy products were less stunted than those who did not consume dairy regularly.

The dairy matrix

A food product is more than the sum of its parts. A natural food is a complex combination of micro, macro, and other elements that interact. Each natural food has its own unique matrix that one cannot reduce to the sum of its elements. The dairy matrix is one of the most complex matrices as it contains nearly all the elements needed to support life. A new holistic approach that tells the good story of the dairy matrix is needed. The discussion should change from single nutrients to whole dairy foods and how these interact. The difference between the matrix in whole dairy foods and in plant-based alternatives should be emphasised.

3.4 How to maximize dairy's contribution to SDGs

FAO view on dairy contribution to SDG's

The dairy sector can contribute both positively and negatively to SDGs in terms of:

1. *Food security and nutrition*
Out of the global population of 7,2 billion people more than 700 million experience severe insecurity while two billion experience moderate food insecurity. Agricultural production will have to increase by 50% to 2050 to supply the food needed by the growing population.
2. *Livelihoods and economic growth*
Seven hundred people globally live in extreme poverty, the majority of them in rural areas. The majority of these are younger people. More than 290 million women and girls rely on agriculture for a livelihood.
3. *Animals and public health*
Malnutrition is the major cause of disease in the world. Food-borne pathogens account for 420 000 deaths per year. More than 70% of the organisms affecting human health originate in animals. About 700 000 deaths per year are related to antimicrobial resistance. Animal welfare matters for both ethical and practical reasons.
4. *Climate and natural resource use*
According to FAO global temperatures have increased by 0,85 degrees. FAO estimates that livestock are responsible for 14% of all greenhouse gas emissions. Annually 12 million hectares of land are lost due to desertification and drought. Local breeds are in danger.

The dairy sector's contribution to GHG emissions increased by 18% from 2005 to 2015 as a result of increased production. At the same time emission intensity decreased by 11%. Higher production efficiency limited the increase to 18%. Without increased efficiency the increases would have been 38%. The dairy industry can limit its GHG footprint by further production efficiencies, carbon sequestration, better linkages to the circular economy, and combination of livestock and crop production systems.

Increased production efficiency will increase food availability, reduce the environmental burden and reduce emission intensity, but will increase the risks for animal welfare and for food quality. Success in achieving the SDGs depends on careful monitoring of progress.

3.5 Sustainable farming: health, antimicrobial use and public perception

Healthy animals for sustainable production

Fertility is an important determinant of economic performance. Dutch research points towards the benefits of shorter inter-calf periods. Clinical mastitis results in heavy losses in milk production. Subclinical mastitis and high somatic cell counts also result in lower production. Undetected subclinical ketosis results in lower production. All the mentioned health problems result in higher GHG emissions.

Managing animal health is important to farmers and for the environment. Farmers must optimise nutrient use in all possible ways. Animal science research must support them in this.

Challenges for antimicrobial use (AMU) and antimicrobial resistance (AMR)

Antimicrobial resistance is a global problem. Various intergovernmental organisations are involved in AMR actions. Limiting antimicrobial resistance will contribute to various SDGs.

The following strategies can limit AMR:

1. Use vaccines to limit antibiotic use in livestock
2. Develop alternatives to antibiotics
3. Only use antibiotics in accordance with OIE recommendations

Nutrition precision technologies

There are huge differences in milk production between various regions, which can be reduced further to decrease the carbon footprint per kilogram of milk produced. This can be done with better early-life nutrition, increased longevity through selection and health care, and the use of bio-available feeds. The environmental footprint can be reduced by precision feeding and the use of food by-products in rations.

4. GENERAL COMMENTS

The general feeling amongst delegates was that the programme did not cater for all interest groups. The idea of joint plenary sessions about issues of general interest is a good one. However the reduction of the conference only to plenary sessions did not provide time for detailed presentations about subjects of special interest to groups.

It is clear that the environmental issue will remain high on agendas. Successful farmer development programmes are exclusively based on the improvement of production practices and market access for small-scale farmers.

Report by CHRISTINE LEIGHTON



Reporting on:

- International Milk Promotion Group
- Standing Committee on Marketing (SCM)
- Joint meeting of SCM and SC Dairy Policies and Economics
- Symposium sessions and side events attended
- Global Dairy Platform
 - Task team: Became member of Environmental Sustainability Communications Team

1. INTERNATIONAL MILK PROMOTION GROUP (IMP)

- IMP is a permanent taskforce of the Standing Committee on Marketing. The main purpose of the business meeting of IMP is to plan the midyear meeting of the following year and the IDF WDS conference on marketing.

During this meeting, members identified topics for the next midyear meeting which will be held in Switzerland. This will be a joint meeting with the Global Dairy Platform for 2 days, followed by 2,5 days IMP meeting.

2. STANDING COMMITTEE ON MARKETING

The main purpose of the committee is to identify the communication requirements related to marketing issues of dairy health and nutrition and sustainability. The marketing conference for 2020 of the WDS is also discussed during these meetings.

Work shared:

- IMP: report on the mid-year meeting was presented.
- Work executed by the European Milk Forum (EMF).

3. JOINT MEETING OF SCM AND SC DAIRY POLICIES AND POLITICS

- Presentation on plant-based eating
- A summary of the country reports was presented⁴

4. TASK FORCE MEETINGS

4.1 IMP

IMP realizes the importance of the consumer and trends that may influence consumer behaviour and how the industry has communicated the dairy messages to ensure they are understood by the consumer.

New developments are observed and it is important to continue to reshape the way we communicate and provide opportunities.

The conversation on climate change is growing louder and there are many examples of activists' voices in the media and these cannot be ignored.

Much of the work done by IMP is to identify these trends and to equip countries with the knowledge and tools to communicate effectively.

Current work items:

- Communications framework for plant-based drinks, which is developed by IMP
- Involvement in Ultra processed foods
- Global Marketing trends – ongoing
- Communication frameworks in general to ensure scientific messages are communicated so that the messages are understood
- Communication framework on the dairy Matrix

4.2 Task force on Ultra Processed Foods (UPF)

The term UPF is linked to a classification (NOVA) developed by researchers. It refers to a level of food processing defined by:

- The technologies used to transform the raw agricultural materials
- The kind and the numbers of ingredients added to the products (food additives / nutritional ingredients) and so-called cosmetic ingredients.

During the meeting it was agreed that the work would focus in priority on fermented milks and dairy ingredients (proteins and lactose).

The main purpose of the attendance of the Task force (TF) was to provide feedback to SCM: once all elements from the experts are compiled at TF level, it will be sent to SCM to translate them into specific communicable messages for different targeted audiences (food policy makers, scientific stakeholders, users of dairy ingredients, NGOs, retailers, consumers, media).

4.3 Environmental Sustainability Communications Team (2020)

The Team has developed message map for 'dairy's role in a responsible and sustainable food system'. Two task team meetings were held in 2020.

5. MARKETING CONFERENCE

During the World Dairy Summit in Istanbul, no session was dedicated to Marketing. Marketing was addressed during different sessions. This is the approach for 2020 as it has been recognized that marketing forms an integral part of most focus areas of IDF.

A preview of the Global marketing survey, conducted by SCM, was presented during a plenary session. Some of the global trends that are shaping policy were discussed.

5.1 Global Marketing Trends

A preview of IDF's upcoming Global Marketing Trends presentation:

Key points of caution for the sector:

- Selected consumer groups are beginning to shape policy at the expense of science and nutrition. Dairy has clear, proven health benefits and is an essential part of our diets. The sector must ensure that policy reflects science, evidence and proven dietary guidelines that have positive impacts for health.
- A clear distinction must be made between the privileged 'questioning' consumer and the average global consumer.
- There is a need for the sector globally not to get distracted by the privileged 'questioning' consumer and jumping on trends; and instead to focus on the important contribution that dairy makes to global nutrition.
- There is a need to ensure that the dairy sector has a place at the global table when these discussions are taking place to ensure the right science is being discussed, and policy is shaped accordingly.

The IDF Global Marketing Trends report will be available in January 2020.

5.2 Display of advertisements

IMP prepared a show-reel of the promotional advertisement and educational video from different countries that attended the WDS. This show reel was played during the breaks and as part of the IMP trophy event.

5.3 IMP Trophy event

During the mid-year meetings, members have an opportunity to enter the IMP Trophy Competition. Case studies and advertising campaigns form part of the entries. The entries must be presented in a standard format which include the problem statement; analysis of the environment; campaign objectives; implementation of the campaign and campaign results. The entries are judged by members present at the IMP mid-year meeting and three finalists are identified. The three finalists are invited to present their entries at the World Dairy Summit each year and the winner of the IMP Yves Boutonnat Trophy is announced at the WDS Gala dinner.

The finalists presented during the lunch hour on 25 September 2019 in the main presentation hall. The three finalists selected were:

UK/ AHDB: Department of scrumptious dairy affairs

France: How do we reach out to & engage with millennials

A shift from up-down traditional to bottom-up social influence marketing

Switzerland: trust in social media

The winner was UK/AHDB

6. SYMPOSIUM SESSIONS ATTENDED

Overall the symposium focussed on global sustainability issues and how this impacts on the dairy industry, within the Sustainability Development Goals. Discussion also focussed on the way this should be addressed to meet consumer demands and how to ensure that dairy can remain relevant as an important food source to feed the nations and meet nutritional demands.

Break away sessions attended:

- How do we address the challenge on sugar?
- Sustainability and Climate change – what are the challenges and opportunities

- The benefits of dairy proteins
- Symposium on small ruminants

7. SIDE EVENTS ATTENDED

- Roundtable on National sustainability programmes from Germany, Australia, Chile and US
- School milk programme

8. GLOBAL DAIRY PLATFORM

The annual meeting of GDP was held on 20 September as a full-day event.

8.1 The work of GDP includes the following:

- Lead pre-competitive activity across the dairy world to engage the sector to create a global narrative on the benefits of dairy
- Represent the sector in dialogue with UN Agencies
- Conduct research into the nutritional benefits of dairy and its role in food systems
- Measure & monitor the sustainability performance of the global dairy sector
- Produce evidence and tools to measure and report the socioeconomic impact of the dairy sector

8.2 During the World Dairy Summit the work done in collaboration with the GDP was reported on:

a. World Milk Day:

The Consumer Education Project (CEP) participated in this initiative that was featured on social media. GDP provided a platform of three videos on dairy nutrition, lifestyle and farming. The CEP used its Dairy Gives You Go platform to promote and celebrate World Milk Day. The results obtained over the World Milk Day were presented. Sixty-eight countries participated and South Africa ranked 8th in the top 10 in terms of the impact CEP had during WMD on the different social media platforms.

b. Environmental Sustainability Communications (ESC):

The Dairy sector has seen a sharp rise in media coverage/discussion on environmental sustainability. Dairy has a positive story to tell about continuous improvement, but challenges remain. Developing common language/messaging will strengthen collective impact/effectiveness. The development of a strategy and plan for expansion of global communications on the topic was recommended.

The aim of the work group is to design a communications plan and framework for the global sector to implement at local and global level.

Messages of the Strategy Framework:

Primary Topics:

Greenhouse Gas Emissions, Animal Care, Water and Biodiversity were identified by the Team as the most critical.

Secondary Topics:

Product Safety & Quality; Rural Economy Development; Waste Reduction and Soil Management were identified by the Team as important, but less critical.

Way forward for the Sustainability Communications Framework group:

Build out message framework; Develop comprehensive communications plan; Identify metrics; and distribute to Dairy Sector by December 2019. CEP has volunteered to be a member of this group.

c. Dairy Search Project

This is a project to monitor the conversation about dairy online; to ensure that the dairy message remains relevant; and to aim to own the dairy conversation online.

This is a joint project with IMP and GDP and is actively discussed during the IMP/GDP mid-year meetings.

d. Dairy Sustainability Framework

DSF is a project run by GDP in conjunction with IDF. The framework is provided to all countries and serves as an excellent starting point to prepare for a sustainability framework in different countries.

DSF members also had the opportunity to hear from six of the DSF Advisory Council (ADCO) on how they saw the future of dairy and the needs of the sector from a sustainability perspective. Facilitated by Dr Judith Bryans, President of the International Dairy Federation and DSF Governor, the ADCO input provided perspectives from a number of different angles, economic, biodiversity, social and nutrition as examples. This session certainly demonstrated the breadth of the topics that are positioned under the “sustainability umbrella”.

The interactive session on the challenges and opportunities for dairy sustainability facilitated by Torsten Hemme identified “Public perception” of dairy as the greatest challenge and the key opportunity for dairy is the dairy nutrition story.

IMP Mid-year meeting report: May 2019; USA, 28 April – 3 May 2019

Included in this report is the report on the IMP Mid-year meeting. Although not required, the information can be useful for the dairy sector from a marketing perspective. It presents the work done by IMP. If any of the presentations are required, please contact the Project Manager of CEP.

1. Global dairy platform feedback

All presentations of the GDP meeting are available on the website.

There were four main themes / take-out from the meeting:

- Use of technology; ‘Search’ – referring to google and internet search is regarded as important in order to ‘own’ the conversation online. The use of bots (automated responses) and apps is also viewed important
- Good understanding of the consumer Generation Z, born between 1995 and 2015 (up to 24 years old)
- Sustainability; sustainable nutrition climate change; animal welfare
- Disruption – there is always a disruptive force that aims to derail milk and dairy in the media

A summary of the two-day meetings is attached

2. Report on IMP meeting:

The sessions were divided into six sections:

2.1 Session1: Market trends and insights: California shared trends in nutrition

Trend 1 looked at plant-based eating patterns.

- The meaning of plant-based was discussed: Plant-based could mean limited meat intake; or exclusively plants. The important role of dairy foods in plant-based sustainable eating patterns was looked at.
- The Plant base movement has reached policy prominence level in some countries which has infiltrated into school eating plans and milk has been labelled ‘optional’ in some countries’ FBDG (Food based dietary guidelines).
- The Mediterranean diet is labelled as a healthy diet to follow.

Trend 2 focussed on a global perspective of sustainability in food systems being formalized into individual country guidelines.

Sustainability in food systems is a global issue in need of a global solution and individual food systems have a global impact. As a result, dietary guidelines are now being established to not only address food related health conditions, but also to include a global perspective of sustainability. Many countries have already taken steps to include sustainability into their national dietary guidelines, including Australia, Brazil, Denmark, and most recently, Canada. The extent to which sustainability is addressed in national policies varies greatly. Although this global perspective of dietary guidance is well intended, it will require thinking critically about how to address all of these in the right way. Health and food systems vary greatly across the globe, and a myopic lens to measure sustainability or health is overly simplistic.

Eat Lancet infographic that is very useful, taken from the Eat Lancet Commission report:

Trend 3 focussed on prioritizing children's nutritional needs for optimal growth and development which is increasingly overlooked by other food and health concerns.

These unprecedented changes to the food system to address sustainability have created the unintended consequence that the nutritional needs of children can be pushed to the wayside or seen as a second priority. When factoring in nutrition related health concerns for children, obesity is often the sole priority issue being addressed. The social, emotional needs of children are also aspects of health which are overshadowing nutrition needs. All this leads us to our trend that the growth and development needs of children are being overlooked. Optimal health for children should include adequate nutrition to support proper growth and development, including bone health, lean muscle, and cognitive development. When these nutritional aspects are not prioritized, nutrient dense foods like milk and dairy can be overlooked as important in a child's diet.

Opportunity for CEP: CEP to develop nutrition review and incorporate the message on the growth of children actively into communication messages. Examples:

- 'Learn more in school with milk being part of that diet' – this is an opportunity for dairy communication.
- "What is the best beverage for children"
- How nutrition supports emotional and increased child learning

Trend 4 focussed on the notion that nutrition may be losing its importance in the conversation about health and sustainability. Trends around food and health are increasingly based on values that no longer centre on nutrition.

This provides an opportunity for dairy to communicate the risks of cutting dairy out of a diet that is not centred around good nutrition aligned with credible nutrition science.

The full presentation is available on request.

Application for CEP: The Project can develop nutrition reviews:

- Importance of nutrient dense foods for child growth and development
- Milk to be part of a plant-based sustainable diet.

2.2 Session 2: During this session presentations on consumer research conducted in different countries were presented, including the interpretation of the results to segment consumers and identify categories for dairy communication. Denmark and Norway showed how they used consumer research / sentiment survey and applied regression analysis to identify segments in the population in order to classify / categorize their targets and strategize their communication plan.

Ireland conducted a sentiment survey and identified different 'tribes' in their consumer base. In this survey they identified the different types of consumers; their characteristics in terms of product usage; consumption of messages; how to communicate with each; and the media touch points i.e. opportunities to connect with each target audience.

For the 'always on' channels e.g. Facebook, they recommended that the channels that deliver, *share and can be considered as advocacy, be considered. The following definitions are important to take note of in the CEP communication objectives.

*Share is defined as 'helps you share or receive information about a brand' and advocacy as 'providing you with trusted recommendations'. Combined, these objectives will help with the overall objective of reassuring the questioning consumer.

Application for CEP: Use existing research results (BMR, Adult survey and focus group discussion 2017/2018) and apply regression analysis to obtain segmentation of the South African consumer and categorize accordingly. This can be used to revise existing communication strategies for the Project.

2.3 Session 3 - Workshop to develop a communication framework for IDF on plant-based drinks.

Plant-based drinks is one of the focus areas of IDF and some standing committees of IDF are tasked to work on this topic to investigate the science behind plant-based drinks (PBD) and identify ways to communicate the relevant information.

IMP was tasked to develop a communication framework for IDF that can be used by members as a template for communicating about PBD in their own countries.

The outcomes of the communication framework are aimed at identifying which specific messages should be aimed at the different target audiences.

There are different topics that will require specific definition with regard to PBD i.e. - nutrition and health; environment; economy; technology; regulatory; food safety; culture; animal health and welfare; and how each play a role in PBD.

The different audiences that will be targeted by members in their own countries are: politics; regulatory; academic; health professionals; gen Z (young adults); parents; sports people; elderly.

For each target audience, a message will be developed that includes the areas of importance, for example for health professionals, the message must include nutrition and health; animal welfare, culture and environment.

The aim is to have a draft communication framework and present it at the IDF-WDS in Istanbul.

Application for CEP: Once the communication framework is finalized and approved, communication messages should be developed for the different target audiences that will be applicable to SA.

2.4 Session 4 looked at different communication channels that can be identified for dairy development. CEP presented the clinics project and showed how the project is measured in order to justify the continuation of clinic project to the stakeholders of Milk SA.

Norway presented a project that is aimed at moms: 'Ordinary food is good enough'. As moms and many consumers are confused by all the contradictory and confusing information that appears on Social Media regarding food and diets, a presence that communicates sound information about certain facts about dairy is required.

The campaign is in its 2nd year and it is also covered in print media.

2.5 Session 5 provided extensive discussions around influencers, the value of influencers and how to choose your influencers as part of a communication strategy.

2.5.1 UK/ AHDB

The UK dairy organisation, AHDB gave a detailed presentation on the different influencer types and how influencers can be used in the different markets to communicate dairy messages.

An influencer is a person/consumer that could be an ambassador for dairy, whether it be at consumer level, health professional level of sustainability/ animal welfare.

Influencer marketing is a new term for 'word of mouth'. In terms of categorizing different influencers, the following provides a guideline regarding the number of followers of each type.

- Micro influencers have 1K- 100k followers: the engagement is very good
- Macro influencers have 100k – 500K followers; engagement may be limited
- Mega influencers have 500k to 1000K followers; depends on products

Points to take into consideration when selecting an influencer:

- Choose the influencer as per the product or campaign that is being promoted. However, in the case of dairy, an influencer, especially a celebrity will be cautious to get involved as they would just lose fans.
- Influencers own website/ profile must be checked as they cannot have dairy alternatives on their website or profile.
- The process to follow when choosing an influencer is: (1) Source the influencer (2) Mail the communication pack (brief of the product (3) inform the influencers of objectives and (4) curate content.
- Training must be provided to influencers to ensure they are well informed of the content to be communicated.
- Trust is an intrinsic driver. However, some countries experience that the dairy industry has limited 'trust' among consumers. Therefore, the dairy industry should not choose a mega-influencer (celebrity) as they are not prepared to put their reputation and following at risk.

2.5.2 Australia presented their influencer programme namely: 'changemaker audience'

Australia has identified people in the industry that can make a difference to the image of dairy and are looking at the following messages:

- Healthiness of food – what's in their food, including additives
- Animal welfare – that we treat animals respectfully
- Farmer welfare – that we support our farmers

These messages are communicated by trusted experts.

- The most trusted influencers for health are: Dietitians; GPs; health associations; academic and research; medical specialists e.g. paediatricians; professional associations (refer slide with graph).
- Most trusted influencers for animal welfare are: Animal welfare groups; animal activists' group; academics/researchers; veterinary associations.

Australia launched a new Dairy Matters website including 'You Ask, We Answer' functionality which allows for open the dialogue with consumers, demonstrates transparency and shows that they are listening to them. Visit www.dairy.com.au to view.

Through media, they invite consumers to ask a question they have about dairy and Dairy Australia answers it – using their scientists/ influencers.

Dairy Australia also has a campaign called: Opening up the farmgate campaign. With this campaign individuals such as dietitians, GPs and environmentalists, with PR and media, are invited to tour the farm and observe good stewardship in dairy farming. During such visits, videos are made and communicated in the press.

Australia had additional focussed messages that they communicate:

- Lactose free does not mean dairy free
- Cutting the confusion on lactose intolerance
- Bone health messages

2.5.3 Dairy California

Dairy California's 'Dairy Reputation Impact' programme elevates their service to the industry by sharing 'snippets' of information to the industry on a need-to-know and timely basis. Hereby they make the industry aware of new topics and research and it is packaged in a user-friendly format.

The trends that are identified in the food industry are followed up with the research that supports/justifies the trend so that it may explain and answer to the trend.

The research is then evaluated to gauge if this could have an impact on the industry. If the trend and research is relevant to the industry, the literature will be developed into an information document that can be shared with the stakeholders and relevant target audiences.

The information has to be timely and newsworthy and reflect that which is important at that specific moment.

Application for CEP:

Look at trends and research that support it. Develop a nutrition review and then draft a user-friendly document for the industry and health professional target audiences and provide the information timeously. This will be in addition to the scientific advertorials and more in the format of:

- Key messages
- How this can be applied in your communication plan

CEP can use this as part of the Processor Involvement Project to increase relevancy of CEP with the industry.

2.6 Session 6: IMP trophy entries: reported on under IDF WDS, Istanbul.

Report by MARETHA VERMAAK



Meeting and sessions attended:

- Business meeting: Taskforce (TF) on Plant-based beverages
- Business meeting: Action team (AT) on Sugar-sweetened milk and dairy products
- Business meeting: Standing Committee on Nutrition and Health (SCNH)
- Business meeting: General assembly – introduction presentation
- Business meeting: Science and Programme Coordination Committee (SPCC) – 2020 planning and priority item meeting
- Video recording: SMP report
- Meeting: IDF WDS 2020 planning with IDF management
- Presentation: Day 2 plenary session – Dairy and Health
- Session: Symposium on Dairy as a nutritional base to nourish the world; How do we address the challenge with sugar;

How to maximize dairy's contribution to SDGs; The benefits of dairy proteins; Unlocking the potential of small ruminants

- Session: Case studies on School Milk Programmes
- Sessions: Celebrations of the World School Milk Day

1. TASK FORCE ON PLANT-BASED BEVERAGES

The aim of the work is to develop a communication framework, targeting different audiences, that compares plain milk and plant-based beverages. A multidisciplinary team that encompasses experts from a number of IDF standing committees have considered several indicators to highlight the fact that plant-based drinks are not alternatives to milk, particularly in terms of their nutritional content. The factors that have been included in the strategy include processing, food safety, regulatory, nutrition, economic, health, environmental impact, and consumer perceptions.

The global objective of the task force:

What?

Milk and PBB are both valid dietary choices but are not equivalent in terms of nutrition and different in the environment and many other factors.

We are protecting the consumer's ability to make balanced and informed choices for healthy futures by clarifying the distinction between the two separate categories.

How?

Creation of two separate categories from regulatory to consumer mind set in every IDF country.

Why?

- Protect the consumer in informed choices (misleading/ confusion)
- Protect the dairy categories
- Ensure dietary and food policies treat them differently

This work item has been classified as a high priority item by SPCC and is represented by all the standing committees from various countries.

The framework of communication is not meant to be a consumer fact sheet, but rather providing a framework for all IDF members to adapt according to their own needs and specific target markets. In 2018 the aim of the task force was to develop the communication framework and the compilation of key messages. In 2019 the validation of the key messages was confirmed and completed.

The term 'minimally processed' when referring to dairy has been discussed fiercely. With regard to safety, it was also mentioned that all foods in the retail market are safe to use. It was suggested that the dairy industry should be careful how they refer to dairy in comparison to plant-based beverages as dairy is also heat treated and in certain cases fortified. Very little evidence is available on the effect of processing on plant-based beverages. However, the dairy industry is highly regulated and has high standards and regulations in place that monitor milk and dairy quality, processes and added ingredients or contaminants. This is not the case for the plant-based beverage system where a lack of regulations is evident. It was suggested that when referring to milk, the term 'no added' or 'minimally added ingredients' and 'minimally processed' are acceptable terms to use.

It was requested that the framework should make provision for communication to different age groups and target markets e.g. the public versus authorities. It was also suggested that the framework should include information on marketing and labelling of milk versus plant-based beverages.

A closing remark made was that it is about distinction and separation of dairy from plant-based foods – from regulatory bodies to the consumer's mind set within every IDF country.

The aim for 2020 is to extend this work to not only focused on milk and plant-based beverages but also on dairy and plant-based products, e.g. cheese and yoghurt versus plant-based cheese and snacks.

2. ACTION TEAM ON SUGAR-SWEETENED BEVERAGES

Governments around the world are putting in place policy and regulatory measures to address non-communicable diseases. These measures have the potential to limit consumption of dairy foods and beverages, especially sweetened / flavoured dairy, which in turn will have unintended consequences on reducing intake of essential nutrients from dairy. Such proposed measures include taxes, labelling, marketing, and sales restrictions, and changes to dietary guideline recommendations.

In 2016 global statistics showed that more than 1.9 billion adults aged 18 years and older were overweight. Of these, over 650 million were obese. Excessive consumption of sugar is one factor that is known to promote overweight and obesity. In March 2015, the World Health Organization (WHO) issued a guideline recommending that adults and children restrict their intake of 'free sugars' to less than 10% of total daily energy intake, and suggesting that a further reduction to below 5% of total daily energy intake would provide additional health benefits. This equates to approximately six teaspoons of sugar (30g).

The guidelines define 'free sugars' as monosaccharides and disaccharides added to foods and beverages by the manufacturer, cook or consumer, and sugars naturally present in honey, syrups, fruit juices, and fruit juice concentrates. It excludes sugars naturally present in fresh fruits and vegetables, or milk because there is no reported evidence of adverse effects of consuming these sugars.

WHO has encouraged countries worldwide to translate these recommendations into food-based dietary guidelines that consider locally available food and customs. Additionally, some countries are implementing public health interventions to reduce the intake of free sugars. These include nutrition labelling of food products, restriction of marketing of food and non-alcoholic drinks that are high in free sugars to children, fiscal policies targeting foods and beverages high in free sugars, and dialogue with food manufacturers to reduce free sugars in processed foods. Unfortunately in South Africa the initiative of the government to reduce the intake of free sugars, ignores to a large extent, the difference between free sugars and the sugar (lactose) which naturally occurs in milk and other dairy products. As a result of these initiatives, many countries have already adjusted their labelling regulations to fit the recommendations made by WHO.

A survey has been developed and approved by SCNH and the survey will be circulated in October 2019. The purpose of the survey is:

- To know labelling practices regarding sugars and especially lactose among IDF countries
- To screen the sugar content of dairy products among IDF countries and sugar reduction practices
- To screen how dairy and lactose is considered in nutrition policies, food guidelines and taxation among IDF countries
- To evaluate the contribution of sweetened dairy products to the diet.

Data compiled will provide a global perspective on dairy's variable sugar content around the world, as well as gain knowledge on sugar-related policies. Information compiled will be shared with IDF membership and provide a basis to the AT to discuss further actions if needed, with regard to the positioning of dairy with added sugars.

In addition to the data of the survey, the action team will compile an evidence-based factsheet or framework of communication for IDF and IDF members to utilize for policy, advocacy, communication and regulatory work to convey clear and consistent evidence-based messages about the role and nutritional value of flavoured/sweetened dairy across a range of formats.

This work item was nominated by SCNH as the priority item for 2019 and is currently second on the priority work items of SPCC's list of five most important items for 2019.

3. STANDING COMMITTEE NUTRITION AND HEALTH (SCNH)

The SCNH's meeting was held on Sunday 22 September 2019 in Istanbul, Turkey.

Matters referred from and liaisons with other IDF bodies

Matters from IDF bodies

- Revised 'Programme of Work' and the 'New Item Proposal' templates have been reformatted.
- There is a new steering group on Sustainability (headed by the SPCC representative for environment Ying Wang, (US)). Stephan Peters (NL) will represent SCNH.
- Joint ISO/AOAC working on methods of analysis on mineral in dairy and formula and the upcoming publication by IDF/ISO on methods of analysis for trace minerals.
- The IDF Sustainability Outlook has been published.

FAO, UN and WHO matters

- UN General Assembly (September)
- COP25 (December, Santiago)
- Global Nutrition for Growth Summit (end of 2020, Tokyo)
- CFS event and consultation (November)
- WHO Essential Nutrition Actions (publication)
- WHO Decade of Nutrition

Upcoming events of interest

- IDF symposium on non-cow milk programme (May, Brussels)
- Cheese Symposium (June, Quebec)

Reporting on current work items:

TF on plant-based beverages

C Marmonier (FR) provided a brief presentation on the project. Data was collected by a multidisciplinary team with the aim of developing a communication framework, targeting different audiences, that compares plain milk and plant-based beverages.

A draft communication framework has been completed. TF needs their agreed statements to be validated by the relevant standing committees to proceed. The SCNH members discussed and amended the wording of the key nutrition statements to:

- Plant-based beverages (PBB) can be a consumer choice, however, they are not nutritionally equivalent to milk and therefore cannot be considered as an alternative in terms of nutrition.
- The milk matrix provides a naturally nutrient-rich package in comparison to formulated PBB.
- Studies show milk has many health benefits. However, there is currently little scientific evidence supporting the health benefits of PBB per se.

The group also discussed the food safety document and felt it should be removed since all foods are safe.

Participants were reminded that not all aspects of the communication framework will be relevant to every member country and that it would be up to that particular representative to implement what is appropriate to their needs. These resources aim to be pro-active, in support of dairy, and not aggressive towards PBB. At the request of SPCC, TF will continue to work and the next step will be looking at imitation products such as “vegan cheese” and “yoghurt alternatives”.

TF on protein from a dairy perspective L Rycken (IDF), provided an update on the protein TF

The main focus of TF has been to engage in the Codex work in setting NCF for soy and milk proteins in infant formula and follow-up formula. IDF has been submitted data and comments, engaged in the call of experts and continues to prepare IDF position for members to engage with their national delegation on this topic. The next step will be the discussions at CCNFSDU which will set the factors.

TF on ultra-processed foods

Y Soustre (FR) delivered a PowerPoint presentation on the classifications used for processed foods and the relevance for dairy products.

A new report from the FAO ‘Ultra-processed foods, diet quality, and health using the NOVA classification System’ was published in July.

The promotion of reducing ultra-processed foods (UPF) in the diet is an issue that we need to prepare for - since dairy falls into some NOVA categories which could be perceived negatively. There are concerns over the increasing media coverage and apps using the NOVA classification of UPF, which is a growing issue in several member countries.

TF’s aim would be to develop a science-based toolkit that can be translated by SCM to be used by the National Committees representing various member countries. The TF, namely members from SCNH, SCFA, SCSIL, and SCDST, will compile a list of questions to form the pillars of the toolkit and to promote the richness and diversity of dairy products. Similar to the PBB project, this TF will target a number of different professionals such as NGOs, health professionals, technical and manufacturing experts, and consumer groups.

TF needs to identify knowledge gaps and divide the work over different committees including SCNH, SCSIL, SCDST, SCFA and SCM. The TF will explain food processing and food safety issues, NOVA and its validity, the link between UPF and health. It was recommended that the group should highlight the affordability and convenience of processed dairy foods.

AT flavoured/sweetened dairy

M Donat (CH) provided an update on the work stream on flavoured and sweetened dairy. AT met the day before to discuss three key areas of work: A Bulletin (Scientific Facts on Lactose), the survey on lactose and the position on flavoured products in the diet. This work aims to be completed within the next three months. The bulletin will look at the wider approach e.g. front of pack labelling, nutriscore etc. The survey template has been finalised and will be sent out to members shortly, it will help develop a framework for the AT.

The committee suggested linking the current work to UPF, in terms of 'added' lactose, and asked if the survey could be included in the bulletin.

AT on impact of changes in dietary recommendations

L Rycken expressed that there had been no further work since the last meeting in May. This work originated from a joint action between SCM and SCDPE (led by SCM). The aim is to analyze the changes in dietary guidelines and to calculate the impact of the reduction of the recommendations on different indicators.

Discussion paper on the microbiome

This paper aims to highlight the role of the diet, particularly dairy consumption, on the gut microbiome and health. However, it was agreed to develop the work written by the previous AT leader (who left the industry), into a more simple overview due to concerns around competition law. The paper is almost complete.

School milk programmes

M Vermaak (ZA) provided an update on the survey and literature review on school milk programmes and reminded the participants about the side events on WSMD, one of which will include a presentation on the data collected from the survey.

The aim of this work was to re-issue a modified version of the 2013 survey to collect data on school milk programmes globally – specifically looking at logistics, nutrition, economics and promotion. An accompanying literature review has been carried out by an external expert. The survey data has been analyzed and a bulletin has been drafted for all aspects except for economics.

AT Coordination of Codex Nutrition Matters (Joint AT with SCSIL)

V Landells (AU) provided an update on the upcoming codex matters and expressed disappointment regarding the lack of feedback on position statements and low numbers at the recent AT meeting.

It is important that members validate position statements of specific codex matters to strengthen the impact of dairy. These documents can be used to check that NC are aligned with IDF position. Documents can be used to liaise with governments and policy makers on specific matters.

The Chair, S Peters (NL), suggested preparing a presentation on Codex for the next meeting so that the members can better understand its role and appreciate its importance. He also suggested compiling a one pager on why we need to support codex matters.

The next codex meeting will take place in Germany in November.

IDF World Dairy Summit Cape Town 2020

M Vermaak (ZA) shared a promotional video and update on the next WDS, which will take place in South Africa next year. The theme for the event is 'Dairy: Wholesome and Sustainable'.

Consideration of new work

The members discussed the following topics as options for new work items:

- Proteins without cows (this could be added to protein TF)
- Sustainable diets - the sustainability steering group is requesting SCNH to help define dairy's role in a sustainable diet – SCNH to regroup members that could suggest a list of key questions and answers on EAT etc and look at metrics that define sustainable diets beyond the environment.

It was agreed that a working group would be set up looking at sustainable food systems (to support the new Sustainability Steering Group).

Roundtable discussion on National items

The following countries provided an update of national actions (themes):

- ZA (dairy product matrix, national nutrition week (pro plant-based))
- BE (dietary guidelines)
- NO (iodine/salt iodization, Nordic dietary guidelines)
- CA (healthy eating strategy, front of pack labelling)
- AU (AU Heart Foundation position statement, mislabelling of PBB, front of pack labelling, sugar labelling)
- DK (Nordic dietary guidelines, net-zero climate review/reducing Agriculture related emissions)
- FR (SSB, dietary guidelines, guidelines for specific groups (e.g. vegetarian, vegan, older adults), CNIEL documents on protein and ULP)
- NL (labelling logos (i.e. nutriscore) sustainable diets/modelling)
- UK (sugar reformulation results, consultations: preventative health, food poverty, and food security, obesity, national food plan)
- IT (dietary guidelines)
- US (dietary guidelines, drinks guidelines for children, identity standards)
- CH (animal welfare and sustainability scheme, nutriscore/labelling)

Other business

The members discussed the challenge of including industry-funded research/evidence in national guidelines; for example in Canada all dairy industry-funded research was excluded from their review for the new dietary guidelines. Members agreed that there is a need to build relationships with academics and nutrition bodies, however, responsibility rests with authors and peer reviewers of the papers. The Chair shared the following infographic, which sums up the general consensus on social media.

Next meeting to be held on 26 May 2020 in Utrecht, The Netherlands.

4. GENERAL ASSEMBLY: INTRODUCTION PRESENTATION

As an SCNH member, the dietitian of the Consumer Education Project of Milk SA was nominated as an SPCC member. During the general assembly, she had to introduce herself to the IDF board members and SPCC. Due to the fact that there were no other nominations for the position, M Vermaak was appointed as the SCNH representative on the SPCC for the term 2020/22.

4.1 SPCC

On the last day of the WDS 2019, the SPCC had a meeting on prioritising work items for 2020. IDF head office and the SPCC decided that for future references they will determine five priority items per year across all SCs. The purpose is to ensure that the work on those items is more focussed and streamlined. These work items will also receive more support from IDF personal and general exposure. These items should all be in the interests of, or to the benefit of IDF and will be reported on.

Ideally, the work item should be able to be completed within the scope of one year. It also does not mean that the other items are not important and SCs should continue working on work items determined by their members.

It was requested that all SCs should submit at least one work item to be considered as one of the five priority items. These should be discussed and voted on by SPCC members by means of a zoom meeting scheduled for the end of October 2019.

5. INDIVIDUAL CONTRIBUTIONS AND/OR PARTICIPATION AT THE WDS

The dietitian of the Consumer Education Project of Milk SA presented a presentation on Dairy and Health during a plenary session on day two of the WDS. As the action team leader of the WSMP survey of IDF, she also took part in a video recording on School Milk Programmes.

6. MEETING: IDF WDS 2020 PLANNING WITH IDF MANAGEMENT AND ACTION TEAM MEMBERS OF SCNH

As part of the planning for WDS 2020 in South Africa, the dietitian of the project has met with the SCNH Action Team members, responsible for the planning of the nutritional component or sessions during the WDS in 2020. The following ideas and proposals were made:

a. For parallel sessions, the following was suggested:

- Nutrition situation from a South African perspective.
Suggested speaker – Dr. Celeste Naudé
- Accessibility and affordability of dairy (dairy value for money)
Suggested speaker – Prof. Drewnoski
- European marketing Force communication platform to do an illustration based on European data to illustrate the affordability of dairy versus plant-based diets to achieve optimal nutrition; or by using an Australian or US example of similar work that was developed.

b. Session on sustainable diets:

- Definition and four dimensions of sustainable diets
Suggested speaker: Director of Nutrition – FAO
- Challenge: Should you include sustainability in your FBDGs (how to do it; for both people and the planet?)
Speaker from WWF – Eating for 2°C
- Animal foods as part of a sustainable diet
Speaker from GAIN
- Session on fermented dairy
- Importance of fermented dairy – cheese/yoghurt
 - Health benefits with specific reference to cancer
 - The role fermented dairy plays in the gut microbiota

Additional topic mentioned: Science behind dairy products and plant-based beverages: Nutrition and Technology

7. SESSION: SYMPOSIUM ON DAIRY AS A NUTRITIONAL BASE TO NOURISH THE WORLD

In this session, the presenters gave a broad background on dairy as nutrient-dense product and how it nourishes the world and helps protect against disease.

Dr. Ali Soze reported that humans have been drinking milk for 10 thousand years. In the early 1900s, the modern dairy industry started after the innovation of pasteurisation and turned into a large industry, producing 860m tons of raw milk per year. Dr Paul Kindstedt emphasized that dairy consumption culture differs from region to region. Some countries love drinking milk, others are major consumers of butter or cheese with 193 varieties in Turkey. Portion sizes also vary from region to region.

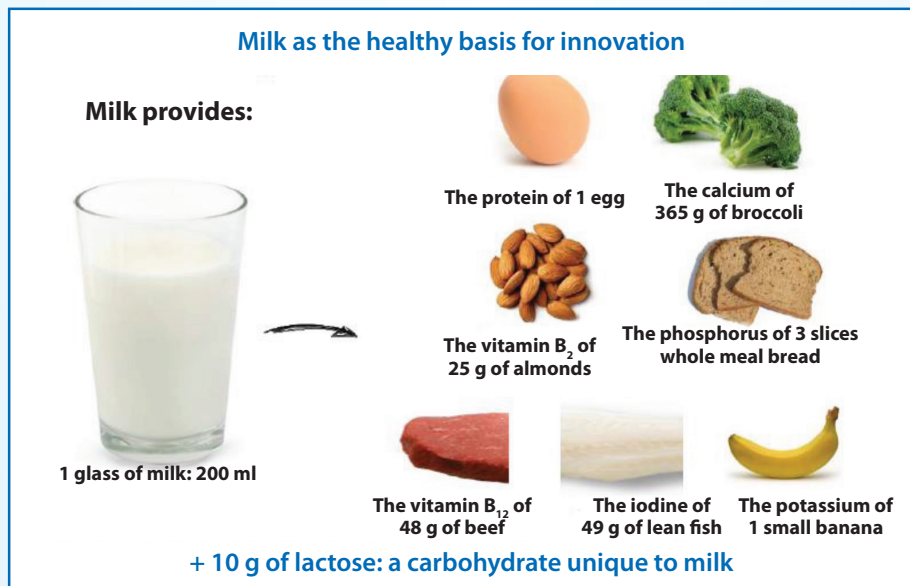
Prof. Rahun Rasit gave an interesting view on the consumption of dairy in different regions of the world and mentioned possible reasons for low consumption in Africa and Asia as:

- Traditional consumption patterns
- Climate
- Poor genetic potential
- Inadequate number of dairy farms
- Lack of financing
- Buffers of intake such as lactose intolerance

Dr Donald Nkrumah reported on the East Africa dairy development programme of Kenya, Uganda and Tanzania. He highlighted that in the past decade, Kenya developed its dairy sector through both retail and production & productivity - leading to significant increases in per-capita milk consumption.

How do we address the challenge with sugar

Dr Thom Hupperzts from the Netherlands presented a brilliant presentation on the carbohydrates in dairy. He started with the comparison of milk to other dietary sources:



He then focussed on the advantages or benefits of lactose in milk:

Lactose is a source of energy; low glycemic index; low sweetness; potential to induce dental caries; the gut microbiota modulation of lactose and lactose derivatives; it improves calcium absorption and acts as a preservative in fermented dairy and products such as sweetened condensed milk.

How to maximize dairy's contribution to SDGs

During these presentations, Berhe Tekola, the Director, Animal Production and Health Division of the FAO and Alfons Beldman from Wageningen University gave an excellent presentation which is well worth looking at. All presentations are available on request.

The benefits of dairy proteins

This session was excellent and very well chaired by Jeremy Hills from New Zealand. Prof. Hiroshi Kawakami from Japan gave a very good overview of Dairy proteins, while Dr Asli Alepinar focussed on Dairy protein versus meat and plant proteins with specific reference to protein quality.

André Brodtkorb from the Agriculture and Food Development Authority presented on the key trend in proteins and referred to the slow and fast proteins in dairy. He explained the function of dairy protein and specific whey proteins in sports nutrition. He also presented the growth areas for dairy protein in infants and toddlers; for athletes and active persons; and the elderly. All these presentations were worthwhile and are available on request.

Unlocking the potential of small ruminants

These presentations were part of the very last conference day's morning presentations and personally, I found them very enlightening as I am not familiar with much research on goat's milk and other mammal milk.

Nazli Türkmen from the Ankara University of Turkey gave a very good presentation on the advantages of small ruminants. She illustrated a comparison of the composition of small ruminants' milk such as goat's and sheep's milk, versus human and cow's milk. Her presentation also focussed on the fats in goat's milk and singled out the higher essential fatty acid and CLA content of goat's milk. Goat's milk also has a higher A2-casein content than cow's milk. This is probably the reason why it is stated that the protein in goat's milk is more easily digested as that found in cow's milk. Goat's milk has a very similar cassien composition to that of human milk and the β -cassien in goat's milk is more sensitive to pepsin.

In her presentation, Nurit Argov- Argaman elaborated on the fats in goat's milk, whereas the other presentation looked at the number of goat's milk and sheep's milk farmers in the sub-Sharah district.

The session was concluded with the note that the studies on comparing the nutritional value of goat's and cow's milk are based on mostly animal models and that there is a need to prove the beneficial effects of goat's milk in humans with more research.

Proteins of goat milk				
	Goat	Cow	Sheep*	Human
Total casein (g/100 mL)	2.11	2.70	4.24	0.40
α_1 -Casein (% of total casein)	5.6	38.0	1.48	NP
α_2 -Casein (% of total casein)	19.2	12.0	5.6	NP
β -Casein (% of total casein)	54.8	36.0	17.53	60-70.0
κ -Casein (% of total casein)	20.4	14.0	0.43	7.0
Whey protein (%) (albumin and globulin)	0.6	0.6	1.01	0.7
Nonprotein nitrogen (NPN) (%)	0.4	0.2	0.043	0.5

Table 3: Protein composition of goat milk compared to human, cow and sheep milk

Minerals of goat milk

Minerals	Goat	Cow	Sheep*	Human
Calcium (mg)	134	119	193	32
Chlorine (mg)*	150	100	160	60
Copper (mg)*	0.05	0.06	0.04	0.06
Iodine (mg)*	0.022	0.021	0.020	0.007
Iron (mg)	0.05	0.05	0.10	0.03
Magnesium (mg)	14	13	18	3
Magnesium (mg)*	0.032	0.02	0.007	0.07
Phosphorus (mg)	111	93	158	14
Potassium (mg)	204	152	136	51
Selenium (µg)*	1.33	0.96	1.00	1.52
Sulphur (mg)*	28	32	29	14
Sodium (mg)*	50	49	44	17
Zinc (mg)	0.30	0.38	0.57*	0.17

Table 5: Minerals content of goat's milk compared to human, cow's and sheep's milk (amount on 100 g)

Vitamins of goat milk

Vitamins	Goat	Cow	Sheep*	Human
Ascorbic acid (mg)	1.29	0.94	4.16	5.00
Folic acid (µg)	1.00	5.00	5.00*	5.00
Thiamine (mg)	0.048	0.038	0.065	0.014
Riboflavin (mg)	0.138	0.162	0.355	0.036
Niacin (mg)	0.277	0.084	0.417	0.177
Pantothenic acid (mg)	0.310	0.314	0.407	0.223
Vitamin A (IU)	185	126	147	241
Vitamin B ₆ (mg)	0.046	0.042	0.08*	0.011
Vitamin B ₇ (µg)*	1.5	2.0	0.93	0.4
Vitamin B ₁₂ (µg)	0.065	0.357	0.711	0.045
Vitamin D (IU)*	2.3	2.0	0.18 µg	1.4

Table 6: Vitamins content of goat's milk compared to human, cow's and sheep's milk (amount on 100 g)

8. SESSION: CASE STUDIES ON SCHOOL MILK PROGRAMMES

World School Milk Day

During a side event on the Wednesday morning, Prof. Nevzat Artik from the IDF National Committee Secretary of Turkey presented case studies on School Milk Programmes in Turkey, while the IDF representative on the School Milk Programmes' survey gave a summary of the work done by the action team of SCNH on the contribution of school milk to the nutrition of children worldwide. During this session IDF also announced the IDF Bulletin on the School Milk Programmes that will be launched in February 2020.

In conclusion, it was a wonderful opportunity and privilege to once again represent CEP of Milk SA at the IDF World Dairy Summit in Turkey. It is not only about the knowledge we gain but also about the very important connections we make with our international peers, and to learn who the various experts on a specific subject within dairy nutrition are. In this regard, the WDS in Turkey was very successful.

Report by JC BURGER



The following business meetings were attended:

- Standing Committee on Food Additives (SCFA)
- Joint meeting of Standards of Identity and Labelling (SCSIL) and SC Food Additives (SCFA)
- Standing Committee on Standards of Identity and Labelling (SCSIL)
- Standing Committee on Microbiological Hygiene (SCMH)
- Standing Committee on Animal Health and Welfare (SCAHW)

1. STANDING COMMITTEE ON FOOD ADDITIVES

1.1 The use of Trisodium Citrates in UHT milk to prevent sedimentation/precipitation was discussed. The need for this additive is considered necessary as milk varies in regions due to breed, climatic conditions and feeding regimes. It was noted that several African countries were opposed to the use thereof in comments to the CCFA meetings. However the use of phosphates as per the General Standards for Food Additives are recognised.

1.2 The meeting discussed Ultra Processed Foods, the outdated fact sheet and the need for a new action team in support of the IDF Task Force on Ultra Processed Food (UPF) with its primary functions to:

- Act as the IDF focal point on UPF issues
- Gather UPF information for reference by all IDF members and National Committees
- Develop factual papers: two page document that provide key data responding to the identified issues, which will be translated in a communication framework by the relevant experts for use by National Committees.

1.3 Plant Based Beverages (PPB)

The meeting noted the important work of the Task Force (TF) on PPB and discussed the establishment of an action team in support of TF that is to work on a strategy to develop a global science based communication framework for the dairy sector to help the National Committees to develop action plans. The global aim is to protect the consumer against misleading messages with key messages under the following headings:

- Nutrition and health facts
- Environment
- Economics
- Technology
- Food safety
- Consumer perceptions
- Cultural importance
- Animal health and welfare

1.4 The alignment of the General Standards for Food Additives (GFSA) and the milk and milk product commodity standards were discussed with the request to members to set up work groups at national level to contribute to the alignment exercise.

2. JOINT MEETING OF STANDING COMMITTEES: STANDARDS OF IDENTITY AND LABELLING AND FOOD ADDITIVES

2.1 Programme of Work Joint SCFA/SCSIL Programme of Work

The main discussion of the joint meeting related to the update of the CCFA alignment of food additives as per the Codex General Standards for Food Additives GFSA and the Milk and Milk Product Commodity Standards. SC Members including South Africa were nominated to participate in the alignment process.

3. STANDING COMMITTEE STANDARDS OF IDENTITY AND LABELLING (SCSIL)

The following matters on the agenda were discussed:

3.1 Development of the Task Force on plant-based beverages

Data was collected by a multidisciplinary team with the aim of developing a communication framework, targeting different audiences, that compares plain milk and plant-based beverages. A draft communications framework has been completed. TF circulated to relevant standing committees the key facts documents to be validated, following which the objective is to have the entire toolkit ready for launch at the beginning of 2020. The Global Framework will then need to be activated locally.

3.2 Protection of dairy terms

Protection of dairy terms was put forward as work by SCSIL and is linked to PPBs (regulations in place) – AT has worked on a comprehensive survey to collect the regulations worldwide. Sixteen members completed the survey with reasonable coverage of the regions except for the Latin American countries who will be reached out to. It was mentioned that it would be a challenge to have an interpretation of IDF work in this space. SC agreed to confirm experts participating in this work and the IDF bulletin; and that members would be provided with any additional feedback on the document.

3.3 Update on Codex matters (CAC) relating to standards for identity and labelling

The Commission finalized its strategic plan for 2020-2023, which highlights the importance of science-based decision making.

3.3.1 Codex discussion on Guidance for the Labelling of Non-Retail Containers of Food: It was agreed that draft revision would go to CAC at step five and would go to CCFL at next meeting.

3.3.2 Codex discussion on Front-of-Pack Labelling (CCFL)

The CCFL (Codex Committee on Food Labelling) gave full support for the work and an electronic WG has been re-established to work on guidelines from step three, as well as a WG at the start of the next CCFL. IDF will monitor this work carefully due to the potential impact FOP labelling may have on dairy.

It should be noted that the South African Government is aiming to publish its FOP labelling regulations early in 2020.

3.3.3 Codex discussion on 'cross promotion' in Codex Standard for Follow-up Formula (FUF) .

Codex endorsed the labelling provisions with certain amendments, however cross-promotion labelling went back to Codex Committee on Nutrition and Foods for Special Dietary Uses (CCNFSDU) (not endorsed).

3.3.4 Codex discussion Paper on Allergen Labelling
CAC endorsed the allergen work; however they have requested scientific work from FAO/WHO on this – with Social science experts – to see how consumers interpret allergen warnings and labelling.

- 3.3.5 Codex discussion Paper on Criteria for the Definition of “High in” Nutritional Descriptors for Fats, Sugars and Sodium.
- CCFL evaluated that work may be valuable, but that it was too early and that the work of FoPNL and the Nutrient profiling from CCNFSDU would be awaited.
- 3.3.6 Claim for “free of” Trans-fatty acids
- The Committee did not take a position on the “free of” TFAs at the last meeting. It does not appear that there is support to have a claim and Canada has been asked to develop a paper that looks at all risk management actions possible within Codex to eliminate TFA intake. No paper has come out yet. It will be Important to continue showing the scientific evidence to differentiate between Industrial and ruminant TFAs.
- 3.3.7 Discussion paper on Nutrient profiling.
- Work is in progress.
- 3.3.8 Discussion paper on probiotics.
- Work is in progress.
- 3.3.9 Development Guidelines for Ready to Use Therapeutic Food (RUTF)
- Further discussion to reference milk proteins as a good source of proteins to treat several malnourished children with these specific products is ongoing. Supported by sound science, IDF continues to defend the inclusion of the provision of milk proteins.

4. STANDING COMMITTEE ON MICROBIAL HYGIENE (SCMH) – attended with observer status

The following items and publications were discussed:

4.1 Codex

- CCFH: Revision of General principles of Food Hygiene and HACCP. SC to discuss latest draft and outstanding comments;
- CCFH: Proposed draft Code of Practice on food allergen management for food business operators;
- CCFH: Guidelines for The Control of Shiga Toxin-Producing E. coli (STEC) in Beef Meat, Leafy Greens, Raw Milk and Cheese Produced From Raw Milk; and
- CCFH Guideline for the Management of (Micro) biological Foodborne Crisis/Outbreaks.

4.2 IDF publications on significant microbiological hazards and topics

- Article on Listeria spp. published.
- CMH to discuss the need for another specific document on pathogens of concern (Salmonella, Bacillus cereus...).
- Inventory of Microorganisms with a Documented History of Use in Food (The update was published at the end of 2018 in IDF Bulletin 495).
- Food Fermentation and Bio preservation.
- Guidance on Process Environment Monitoring for microbiological contamination.
- Whole Genome Sequencing (Published on IDF Website).

5. STANDING COMMITTEE ON ANIMAL HEALTH AND WELFARE (Observer status)

The meeting was attended noting the proposed Priority items for 2020/2021

- Progress on the interpretation of somatic cell count (SCC) from goat's milk.
- Follow up on antimicrobial use on mastitis treatment.
- Progress on the development of guidelines on use of sensors for animal health and productivity.
- Progress on the development of IDF Mastitis Definitions.
- Planning of the 7th ParaTB Forum and related publication.
- Planning of sessions related to AHW at the IDF World Dairy Summit in Cape Town (South Africa).
- Monitoring AMR in Pathogens of importance for the Dairy Sector and database creation.
- Start the re-collection of data on industry milk quality and hygiene statistics.
- IDF monitoring and input to the work of ISO/TC 034/WG 16.

6. SYMPOSIUM SESSIONS ATTENDED

The symposium programme under the theme "Milk for Life" took place from 23 to 26 September 2019 and was well attended including the poster sessions under the following programme headings:

- Opening ceremony.
- Dairy leaders forum: The future of dairy.
- Dairy outlook 2019 to 2020.
- Food policies and regulations overview.
- Dairy as a nutritional base to nourish the world.
- How do we address the challenge with sugar.
- What is the dairy sector strategy to address food loss and food waste.
- How to minimize dairy's contribution to the SDGs.
- Sustainable farming: health, antimicrobial use and probiotic perception.
- Sustainable climate change : what are the challenges and opportunities.
- Benefits of dairy proteins.
- Symposium on small ruminants.

Report by COLIN OHLHOFF



OVERVIEW

The author attended and/or participated in the following meetings and seminars:

1. Standing Committee Meeting on Environment (Friday, 20 September 2019)
2. Action Team Meeting on Solid Waste Management (Saturday, 21 September 2019)
3. Dairy Sustainability Framework Presentation (Saturday, 21 September 2019)
4. Standing Committee Meeting on Animal Health and Welfare (Saturday, 21 September 2019)
5. Sessions Attended:
 - a. Opening Ceremony and Keynote Address (Monday, 23 September 2019)
 - b. World dairy Leaders Forum (Monday, 23 September 2019)
 - c. Dairy Outlook (Monday, 23 September 2019)
 - d. Various presentations in session "Dairy as a nutritional base to nourish the world" (Tuesday, 24 September 2019)
 - e. Various presentations in session "What is the dairy sector strategy to address food loss and food waste" (Tuesday, 24 September 2019)
 - f. Various presentations in session "How to maximize dairy's contribution to the SDG's (Wednesday, 25 September 2019)
 - g. Various presentations in session "Sustainable farming: health, antimicrobial use and public perception (Wednesday, 25 September 2019)
 - h. Various presentations in session "Sustainability and climate change: What are the challenges and opportunities (Wednesday, 25 September 2019)

OBSERVATIONS AND IMPORTANT THEMES FROM STANDING COMMITTEE MEETINGS

The nutritional value of dairy and the role which dairy farming has in sustainable food production systems resonated as the predominant theme through discussions within the standing committees. Focus from IDF is emphasized through the continued support of growing a science-led knowledge base, which is viewed as the most appropriate manner to address negative sentiment towards the industry.

It emerged that our sector should be cautious against making bold claims when countering plant-based diets, which is often pronounced by the fact that there is a lack of scientific evidence supporting the environmental benefits of plant-over animal-based nutrition. Experts endorse referencing the complexity of food systems and the notion that plants and animals work optimally when integrated with one another. This draws reference to efficient land-use strategies, where grazing and crops for ruminant feed do not compete with arable land required for the cultivation of nutrition for humans.

Further, from an environmental perspective, one of the key focus areas within IDF remains dairy carbon foot printing. This incorporates the latest research around methane and its role in the GWP* model which shall be referred to later in this report. Advancing Carbon-sequestration calculations and the development of footprint tools have been identified as priority within this Standing Committee. The Dairy Sustainability Framework is currently busy with an extensive literature review on 'Methane' and they have approached an expert on the subject to assist with this undertaking. The report will be distributed to the beef, pork and dairy sectors. Once finalized they intend to approach LEAP (Livestock Environmental Assessment and Performance Partnership) to assist with modelling.

The other core focus area includes furthering the science around the environmental benefits of dairy farming. This has specific reference to soil fertility, Nitrogen and Phosphorous cycles as well as biodiversity. The LEAP guidelines for quantitative biodiversity assessments in the livestock sector are currently out for review. This is of importance as biodiversity and soil create a link between the dairy sector and the natural environment. Sentiment is that this area of science is currently underutilized and can be used to strengthen marketing campaigns which promote the benefits of animal-derived nutrition.

The United Kingdom has proposed that new work be considered around the impact of food waste and plastics on the dairy sector as recent surveys unveiled these issues as priority consumer concerns. This following the announcement of the Courtauld Commitment 2025 in that same country which is a sector-wide agreement gaining support from organizations across the food industry. Participation requires adherence to a ten-year commitment to identify and implement change which will reduce Carbon, water and waste associated with food and beverages by at least one-fifth. Alarming, global statistics indicate that if 'food waste' was a country, it would account as the third largest Green House Gas emitter. It was noted that it is important for IDF to have a stance on this topic although it is an issue which affects all industries / sectors and therefore it might not be necessary at present to have a dedicated Action Team assigned to it.

OBSERVATIONS AND IMPORTANT THEMES FROM CONFERENCE SESSIONS

Reference to the concept of 'Planetary Boundaries' and the notion that exceeding these thresholds will detrimentally alter the environment in which we live was mentioned as the single greatest challenge facing humanity. Through the course of the conference, various key opportunities and challenges currently facing the dairy sector were identified. While the challenges are numerous, the author experienced much positivity from the speakers which created a growing sense of optimism in view of the global dairy situation. Idil Yigitbasi, the CEO of Turkish dairy processor Pinar, made an influential statement in her address at the Leader's Forum: "The better a child grows, the better the prospects for a country" drawing attention to the nutritive value of dairy and its role in shaping the future well-being of society. This theme was prominent throughout the event.

One of the primary challenges relates to mounting consumer anxiety around the climate crisis and it remains vital that we are able to build consumer trust in dairy, especially in the younger population. It is becoming increasingly apparent that policy is affected by global consumer feedback and trends. The plant-based movement for instance has received policy-level attention with government groups more open to embracing change. We have also seen the establishment of individual country dietary guidelines without holistically considering the impact around the sustainability of food systems. This serves as a warning to our sector that we should not take our emphasis off 'nutrition' and its importance in overall health and sustainability.

Malnutrition remains the single largest contributor to disease with the FAO indicating that more than two billion people do not have access to safe, sufficient and nutritious food. The dairy industry has a crucial role to fulfil towards breaking the curve of malnourishment. It should be noted that the international view on sustainability is that of being involved in a collaborative undertaking, whereby establishing credibility is key.

Statistics were presented highlighting the current global dairy situation. Although dairy trade volumes had increased by 5% in 2018, indications are that growth will be slower by the end of this year. Asia currently accounts for 31% of the world's milk production, with six countries providing 80% of total milk volumes. The dairy industry in China continues to develop at a rapid rate with statistics demonstrating a 48% increase in production between 2008 and 2018 and a 37% increase in per capita consumption of dairy. Co-ordinated promotion of the health benefits of dairy products and the role of dairy in a balanced diet, especially among the middle class, was a key driver in stimulating the growing demand. With a vast population (currently around 1.4 billion people) the potential for further growth in the Chinese dairy industry is vast.

Addressing the issue around food waste, as was discussed in the SCEVN meeting, is increasingly being regarded as a powerful mitigation measure towards slowing climate change. A report published by the Intergovernmental Panel on Climate Change in 2019 drew attention to the synergies which reduction of food loss (and waste) has with food security and land use efficiency. Figures made available by WRAP, an organization in the UK which primarily aims to accelerate the movement towards a resource-efficient economy, indicated that in the UK approximately 7% of all fresh milk sold goes to waste with losses in the value chain largely happening post-retailer. It was suggested that simple opportunity exists to dramatically reduce these losses through lowering consumer refrigeration temperatures to 5°C while increasing the 'use by' dates by one day. Considering the attention this topic received over the course of the conference, the author expects this to become an area of focus across more countries in the near future.

Climate change and the temperature impacts of methane, including the representation of equivalence between CO₂ and methane using the Global Warming Potential Star (GWP*), was presented in line with results shown earlier this year at the IDF meeting in Brussels. This research emphasizes how conventional Global Warming Potential calculations currently misrepresent the impact of methane due to it actually being a short-lived climate pollutant. It was made clear that although methane does have a significant impact on climate it is very different from that of CO₂ and N₂O. Simulations demonstrated that increasing methane emissions have a severe impact towards increasing warming; however, if methane emissions are gradually decreased (at a rate of about -0.3% annually), the net result would be zero warming.

If this rate were to decrease further it could even have a net cooling effect which ultimately presents an interesting climate change mitigation opportunity. With the recent prominence of this work across various IDF platforms, its further development should be considered of high importance for the dairy sector and the topic is to be monitored closely going forward.

To conclude, the IDF priority areas were clearly defined with the environmental agenda being mentioned as a key focus. The macro-economic climate poses a few uncertainties which could impact the dairy sector over the next period with the US/China trade war and the implications of Brexit, as well as slowing economic growth in developed countries mentioned as potential risks.

Production growth will be more reliant on improved science and technology while the decreasing cost of robotics is likely to affect employment and labour requirements. Furthermore, challenging media misrepresentation remains integral towards ensuring that the facts on dairy are communicated properly while defending the nutritional integrity of dairy products will continue to be a priority area moving into 2020. The sector must continue to nurture the coevolution of dairy with society and sustainability. Emphasis should be placed on transparency and changing the current unbalanced narrative which dairy faces, mostly in the younger generation. The author noted some general short-comings in the time keeping and structure of conference sessions while the overall dissemination of scientific information was of a good standard.

ACKNOWLEDGEMENT

The author would like to express sincere gratitude to the South African National Committee of IDF for funding his attendance at this prestigious event in Istanbul, Turkey.

Report by STEPHAN STEYN



SUMMARY

I had the privilege to attend the IDF WDS 2019 in Istanbul Turkey as alternate member for the Standing Committee: Dairy Science and Technology (SCDST), Dr Jan Floor, who could not attend due to personal reasons.

Some of the information in this report reflects discussion points only and does not reflect the position and / or approval of IDF. Slides included from TF meetings are not for the public domain as internal documents were used in discussions.

MEETINGS ATTENDED

1. Standing Committee on Dairy Science and Technology (SCDST)

SCDST had its meeting on Saturday, 21 September 2019, from 09:00 – 13:00, at the Hilton Hotel Bomonti, Istanbul, Turkey.

Mission / Objectives / Priorities

The SCDST has the following mission, objectives and priorities for 2019/2020:

Mission

Effective communication of new and relevant technology for the dairy sector

Objectives 2019/2020

- Identify scientific findings that are of benefit to the dairy sector
- Host scientific conferences and workshops to disseminate the latest information of interest to the dairy sector
- Publish new dairy food science information in IDF monographs and other scientific journals
- Promote the participation of young and emerging scientists at IDF conferences
- Maintain effective and regular communication and participation with IDF standing committees and other scientific organizations and conferences on areas of common interest
- Promote the progress of the dairy sector in developing IDF-member countries

Priority Items 2019/2020

- Preparation and publication of additional fact sheets
- Novel use of milk and whey permeate
- Cheese Ripening Symposium, Quebec (CA)
- DST conference at IDF WDS2020, Cape Town (ZA)

Agenda for Meeting

The agenda had the following topics of interest:

1. *Matters referred from liaisons with other IDF bodies:*
 - a. Task Force (TF) on Ultra-processed foods
 - b. Action Team (AT) on Flavoured or sweetened dairy products
 - c. TF on digital innovation
2. *Programmes of work*
 - a. 8th Cheese ripening Symposium, Montreal, Canada, 1-5 June 2020
 - b. IDF WDS 2020 Cape Town, South Africa, 28 Sept – 1 Oct 2020
3. *Fact Sheets for the IDF website*
 - a. What is cheese – styles and varieties
 - b. Lactose
 - c. Membrane technology
 - d. Gene editing
 - e. Recombined milk
 - f. Other fact sheets
4. *Consideration of new work*
 - a. Involvement of young scientists
 - b. Strategy on future publications
 - c. 8th IDF International Symposium on Sheep, Goat & other non-cow Milk
5. *Other conferences of interest*
 - a. 9th International Whey Conference
 - b. 20th World Congress of Food Science & Technology
 - c. Plant-based “dairy”; expression of milk proteins in non-bovine cells using recombinant technology. This will be held at the American Dairy Science Association meeting in Cincinnati.
6. *Election of Chairperson and Deputy Chairperson for SCDST*
7. *Next meeting date for SCDST*

Discussion / Outcomes

The discussions and outcomes of relevance will be discussed below.

- 1.a I attended TF on Ultra Processed foods, more information later in this report. Ms C Leighton also attended this TF.

2.a More information on the Cheese Ripening symposium available at:
<https://fil-idfcheese2020.com/en/about/idf-international-cheese-science-and-technology-symposium/>
The SC information sheet on this event is attached as **Annexure A**

2.b I presented the PowerPoint slide show and video that was given to me by SANCIDF. The attendees were excited about the WDS2020, as the WDS2012 in CT was a great success. There are great expectations that South Africa will present a truly world class event as the WDS2019 did have some challenges in the programme and presentations (Speakers and content).

The then draft programme was presented and discussed, no decisions could be taken, and recommendations would be given through to Maria at IDF.

An AT was commissioned to give proposals on speakers and topics. SCDST members were asked to look out for a call for abstracts, as well and to forward the call for abstracts to interested parties for submission to the WDS2020 organizing committee.

3. Discussions on the various fact sheets that are nearing completion.
New proposals included:
 - A Milk Tree
 - Benefits of milk fats – Specifically referring to Cholesterol (Co-operation with SCNH)
 - Eco Friendly related matters to dairy
- 4.a There were some concerns as the number of young scientists attending the World Dairy Summit is low and there is little involvement of younger scientists in the various SCs. Ideas are needed to get more involvement through various avenues.
- 4.c More information on the 8th IDF International Symposium on Sheep, Goat & other non-cow Milk available at: <https://www.fil-idf.org/event/8th-idf-international-symposium-on-sheep-goat-and-other-non-cows-milk/>
- 5.a More information on the 9th International Whey Conference available at: <http://www.internationalwheyconference.com/>
- 5.b More information on the 20th World Congress of Food Science & Technology available at: <https://www.iufost2020.com/>
6. A new Chairperson and Deputy Chairperson were elected for SCDST:

Diarmuid (JJ) Sheehan - Chair (ireland)
Teagasc Food Research Centre Moorepark
Senior Research Scientist, Food Chemistry and Technology dept.
Phone: +353 25 42232 | Email: diarmuid.sheehan@teagasc.ie

Walter Bisig – Deputy Chair (Switzerland)
Agroscope Food Microbial Systems
Senior Scientist, Research Group Cheese quality and authenticity
Phone: +41 58 464 05 80 | Email: walter.bisig@agroscope.admin.ch
7. The possibility of the next SCDST meeting was mentioned for June 2020 to coincide with the Cheese Ripening Symposium: Fairmount Château Frontenac, Quebec City, Quebec, Canada
1-5 June 2020

2. TASK FORCE – ULTRA-PROCESSED FOODS

I attended this session and found it very informative. It is a topic that is cross-disciplinary and may affect the image of dairy to consumers.

Products affected by this classification are as follows:

Product	FAO report conclusion
Pasteurised milk	Minimally processed
Cheese	Both processed and ultra-processed
Fruit Yoghurts	Ultra-processed
Hydrolysed proteins, casein, whey protein and lactose	Ultra-processed (fractioning of constituents in general)
Infant formula, baby food, food for specific targeted population	Ultra-processed

Consensus reached in the meeting:

- The dairy industry should stand for the advantages of milk and not attack the opposition through trying to advocate the disadvantages in their products/classification systems.
- Take a scientifically based approach to fight against the classification of dairy products as ultra-processed products.
- Investigate an alternative system to the current NOVA system to classify products
- A proposal was given to rather look at renaming the classification to dairy as “Highly processed foods” instead of “ultra-processed” foods.
- More research is needed on the topic

More information on the NOVA system and classification on products can be found on:

https://za.openfoodfacts.org/cgi/search.pl?search_terms=&search_simple=1&action=process

Draft minutes from IDF (taken by Laurence Rycken) attached as **Annexure B**

3. ACTION TEAM ON WDS2020 – PROPOSALS FOR TOPICS AND SPEAKERS

The action team consists of the following persons:

Group Members

Diarmuid (JJ) Sheehan (SCDST Chair)	diarmuid.sheehan@teagasc.ie
Walter Bisig (SCDST Deputy-chair)	walter.bisig@agroscope.admin.ch
Natalie Jones	njones@consorciolechero.cl
Thom Huppertz	thom.huppertz@frieslandcampina.com
Jompie Burger	jompie@dairystandard.co.za
David Everett	drcheese@mac.com
Jan Floor	jan.floor@clover.co.za
Stephan Steyn	info@sasdt.org.za

An informal AT meeting was held during the WDS and present were Diarmuid, Walter, David, Stephan and Jompie. Topics and possible speakers were discussed. A first draft document incorporating the suggestions as well as the suggestions from Dr Heinz Meissner was sent to the South African organising committee on 8 October 2019. This document is attached at the end of this report as Annexure C.

4. IDF STAFF MEMBERS AND SOUTH AFRICAN DELEGATES INVOLVED IN THE WDS2020 ORGANIZATION AND ACTION TEAMS

This meeting was held on Thursday morning 26 September 2019. Edu Roux, the secretary of SANCIDF took detailed minutes of the meeting. The meeting was a discussion on the planning of the WDS2020 Cape Town.

WDS 2019

The WDS2019 commenced on Monday 23 September 2019. The programme is available on <http://idfwds2019.org/>. The Speaker presentations will be made available at a later date by IDF.

I attended the full programmet on Monday 23 September and on 24 September 2019. During the first breakaway session, at 14:00, AT on WDS2020 had an informal meeting. I attended the afternoon sessions on sugars in yoghurt and lactose. On 25 September 2019, I attended the whole programme and paid specifi attention to the sessions on the benefits of dairy proteins. This was very informative and information on this will be available on the presentations once made available from IDF.

Feedback sessions

The following IDF2019 feedback session has been confirmed:

1. Article in The Dairy Mail December 2019 (Front page inserted as Annexure D)
2. SASDT Northern Division Year End meeting 7 November 2019

General

It was a great privilege for me to attend the WDS2019 in Istanbul. I networked with many people, socially and professionally, and enjoyed exploring Istanbul. This was the second IDF WDS that I attended, but it is the first one in which I participated actively in the more organized structures of IDF. I attended the WDDS2012 as a delegate.

The opportunity to add value to SANCIDF and IDF through my input and experience in SASDT is greatly appreciated. I also learned a great deal about the structure of IDF and the SCs and hope to be of value to SANCIDF for further events and planning.

I am thankful for the opportunity given to me to attend the WDS2019.

IDF International Science and Technology Symposium

www.fil-idfcheese2020.com

Fairmount Château Frontenac, Quebec City, Quebec, Canada



Co-organized by FIL-IDF Canada and the Quebec STELA Dairy Research Centre of Université Laval, the 2020 edition of the IDF International Cheese Science and Technology Symposium will gather international scientific and industrial cheese experts to share the latest research findings and technology innovations.

In addition to the symposium, the whole dairy industry is invited to a full week of activities, such as the scientific communication event, Novalait Techno Forum, the IDF-Canada Dairy Outlook Seminar, the Quebec Cheese Artisan's Workshop, and the Ceremony of Quebec's best cheeses contest. Combined with the pleasure of visiting Quebec City, cradle of French civilization in North America proclaimed UNESCO World Heritage site, this exceptional gathering of the dairy industry promises to be a very enriching professional experience.

Themes:

1. The cheese microbial ecology: Starters, adjunct and indigenous microbiota
2. Cheese Technology: Process efficiency and innovative approaches
3. Ripening, flavor and cheese authenticity
4. Cheese texture
5. Functionality, nutrition and health
6. Innovation and consumer-centric approach to research

Confirmed keynotes

Dr. John A Lucey, Centre for Dairy Research

Dr. Eileen Gibney, University College Dublin

Subscribe to the Newsletter: <https://fil-idfcheese2020.com/en/subscribe-to-the-newsletter/>

Registration opening in the fall 2019

Stephan Steyn, IDF WDS 2019, Event Report

Draft minutes Prepared by chairs and IDF HO

Present: Y Soustre (FR) and C Carvalho (FR)- TF chair, E Sliwinski (NL), A Babuchowski (PL), I Jobard (FR), B Graves (US), M Cameron (AU), V Landells (AU), O Beaulieu-Charbonneau (CA), A Sayler (US), N Gardner (US), J Allan (US), W Bisig (CH)
Observers: Y Komatsu (JP), O Suganuma (JP), S Totsuka (JP), L Coutant (FR), E Treuil (FR), M Christensen (DK), S Steyn (ZA), C Thompson (US), P Harrod (CA), D Sheehan (IE), P Upreti (US), P Kolakowski (PL), Ch Leighton (ZA), I Gandolfi (IT) IDF HO: L Rycken (IDF)

1. BACKGROUND ON ULTRA-PROCESSED FOODS (UPF)

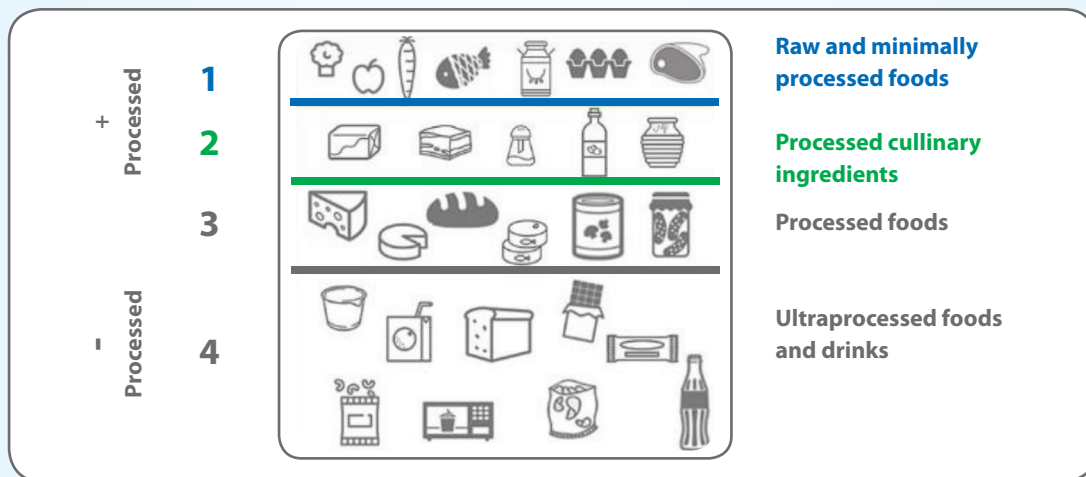
The term UPF is linked to a classification (NOVA) developed by researchers. It refers to a level of food processing defined by:

- The technologies used to transform the raw agricultural materials
- The kind and the numbers of ingredients added to the products (food additives / nutritional ingredients) & so-called cosmetic ingredients.

A food is defined as ultra-processed if it contains at least one (ultra) processed ingredient (excessive fractionation of its original matrix/cracking) or a cosmetic additive (colouring, aromas, texturizers, taste enhancers, sweetener, ...) to imitate, restore and/or exacerbate sensory properties.

2. NOVA CLASSIFICATION

NOVA classification is a system developed by Professor Monteiro and his team in Brazil to classify foods into four categories:



3. WHY SET UP AN IDF TF ON UPF?

Because:

- In some countries Governmental bodies have already taken actions on this topic to limit consumption of UPF, and some consumers are now questioning the benefits of dairy products that utilize additives and/or undergo processing. As the trend is likely to spread in other countries, we should be prepared.
- NOVA score and/ or other methods for categorizing ultra-processed foods could ultimately be used for nutrition policies such as front-of-pack labelling (FOPL) schemes and could also impact standards for dairy products.
- The impact on dairy products, their classification and consumer views needs to be explored and understood by IDF and its members/National Committees.

Therefore, the IDF Task Force on UPF will

- Act as the IDF focal point on UPF issues
- Gather UPF information for reference by all IDF members and National Committees
- Develop factual papers: two-pages that provide key data responding to the identified issues, which will be translated in a communication framework by the relevant experts for use by national Committees.

4. WORK GOALS AND ORGANIZATION OF SPECIFIC ACTION TEAMS

TASK FORCE AIM: Transparency/ Knowledge and REINSURANCE. Dairy products, whatever their level of processing, are of importance in a healthy diet. Explain that processes and additives are applied/used for a specific purpose to achieve safety and quality targets. Identify knowledge gaps and encourage scientific research to fill the knowledge gaps.

In order to deliver a science-based toolkit (two-page document), the work of TF will rely on three pillars: Nutrition & Health, Technology and Food additives. Thus, three specific working groups have been set up in the relevant standing committees: SCNH, SCFA, SCDST.

Each working group will answer relevant questions linked with UPF.

Nutrition & health:

- Link between UPF and health: Is there any science behind this?
- What are the available facts to explain that dairy products, whatever their level of processing, are of importance in a healthy diet?
- What are the knowledge gaps?

Dairy Science & Technology:

- Focus on milk fractioning: Are milk ingredients ultra-processed?
- What are the benefits and disadvantages of the different processes used?
- Thanks to the different processes applied, we are able to offer a great diversity of dairy products
- What are the knowledge gaps?

Food Additives:

- How are food additives evaluated?
- Which food additives are used and why?
- What are the knowledge gaps?

During the meeting, TF agreed that the work would focus primarily on fermented milks and dairy ingredients (proteins, lactose).

Once all elements from the experts are compiled at TF level, they will be sent to SCM to translate them into specific communicable messages for different targeted audiences (food policy makers, scientific stakeholders, users of dairy ingredients, NGOs, retailers, consumers, media...). TF identified food policy makers as the first priority to work on.

Composition of the working groups

Food additives:

Leader = Nicholas Gardner (US)

Members = Camille Carvalho (FR), John Allan (US), Victoria Landells (AU)

Technology:

Leader = Diarmuid Sheehan (IE)

Members = Frédéric Gaucheron (FR)

Nutrition & Health

Leader = Yvette Soustre

Members = Ivana Gandolfi (IT), Melissa Cameron (AU), Mindy Wigzell (NZ) and US expert (TBC)

The SCM will be kept updated on the work of the TF by Christine Leighton who is the referent.

Timeline and actions

Victoria Landells offered to send a draft document in the coming weeks.

Inputs from the three working groups should be sent by the end of the year.

Next meeting: conference call Q1 2020 (date to be confirmed).

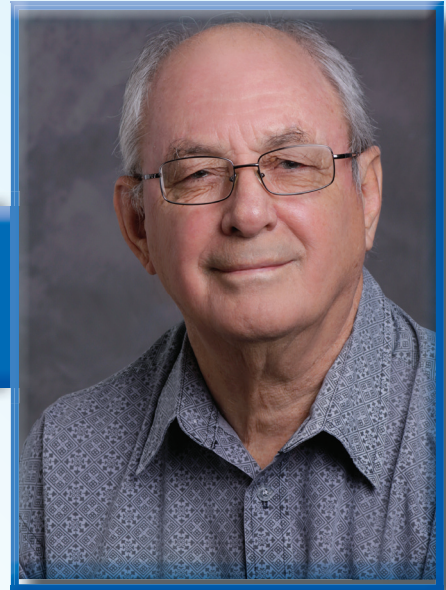
For more information, the power point presentation and the FAO report are available on IDF Intranet

<https://intranet.fil-idf.org/document/list/11687>

Proposal for topics and Speakers (Combined list) NO CONFIRMATIONS HAVE BEEN DONE*Annexure C*

Proposed Topics	Proposed Speaker	Session proposed	Affiliation/IDF expert	Proposed by
Sustainability, greenhouse gases and dairy proteins	Dr Stewart Ledgard	Environment (Pre Farmgate)	Massey University (NZ)	Topic: David Everett Speaker: David Everett
Life Cycle Assessment	Ying Wang	Environment (Pre Farmgate)	IDF expert	Topic: Stephan Steyn Speaker: Ying Wang
Circular Economy	Gina Lucci	Environment (Pre Farmgate)	New Zealand Pastoral Agriculture Research Institute	Topic: Stephan Steyn Speaker: Stephan Steyn
Value chain, 4th industrial revolution, digitalization and impact on supply chain		Environment (Post farmgate)		Topic: Jompie Burger Speaker: Jompie Burger
Sustainability for medium dairies, making science accessible to smaller producers				Topic: Jompie Burger Speaker: Jompie Burger
Integrative supply chain for the entire value chain		Dairy Leaders Foru OR Environment (Post farmgate)		Topic: Jompie Burger Speaker: Jompie Burger
Yeast fermented products - Kefir	Ask for guidance – technical or company based (if they are willing to share)	Dairy Science and technology		Topic: Stephan Steyn Speaker: Stephan Steyn
Recombination		Food policies and regulation OR Trends OR Dairy Science		Topic: Stephan Steyn Speaker: Stephan Steyn
Innovation in dairy processing				Topic: Diarmuid Sheehan Speaker: Diarmuid Sheehan
Effect of pasture fed and TMR on milk properties in end products	Find south African speaker	Dairy Science and technology		Topic: Diarmuid Sheehan Speaker: Diarmuid Sheehan
Raw milk conditions and effects on RTE	Find South African speaker	Dairy Science and technology		Topic: Diarmuid Sheehan Speaker: Diarmuid Sheehan
Seasonal changes on milk and other dairy products	Find South African speaker	Dairy Science and technology		Topic: Diarmuid Sheehan Speaker: Diarmuid Sheehan
Flocculation in UHT products	Allan Kelly	Dairy Science and technology	University Colleague Cork	Topic: Jompie Burger Speaker: Walter Bisig
Global Harmonization	Huib Lelieveld (President GHI) Larry Keener (VP GHI)	Harmonize standards towards safety	Global Harmonization Initiative GHI	Topic: Geoffrey Smithers Speakers: Geoffrey Smithers
Consumer Trends and Choice (Innova Market Insights)	Lu Ann Williams	Innovation at consumer level	Innova Market Research	Topic: Geoffrey Smithers Speakers: Geoffrey Smithers
Sustainable success on pasture-based farming in South Africa – case study	Dr Craig Galloway	Sustainable dairy farming for all (plenary)	Trace and Save	Topic: Dr Heinz Meissner Speaker: Dr Heinz Meissner
The closed-farm-system to manage nutrients, emissions and pollution		Farm Management		Topic: Dr Heinz Meissner Speaker: Dr Heinz Meissner
Integrated Pest Management as alternative to herbicide use on pastures		Farm Management		Topic: Dr Heinz Meissner Speaker: Dr Heinz Meissner
Carbon footprint of high and low input milk production systems	Prof Friedhelm Taube	Sustainable dairy farming for all (plenary)	Kiel, Germany	Topic: Dr Heinz Meissner Speaker: Dr Heinz Meissner
Mitigation opportunities	Dr Michelle Cain (Oxford, UK) (she is not the right speaker on this topic)	Sustainable dairy farming for all		Topic: Dr Heinz Meissner Speaker: Dr Heinz Meissner
		Sustainable dairy farming for all	(NRCS/USDA, USA - now consultant)	Topic: Dr Heinz Meissner Speaker: Dr Heinz Meissner
Regenerative agriculture with emphasis on dairy	Mr Ray Archuleta	Sustainable dairy farming for all (plenary)	WWF	Topic: Dr Heinz Meissner Speaker: Dr Heinz Meissner

Report by EDU ROUX



It was a great privilege to be delegated to attend WDS 2019 in Istanbul, Turkey, by the SANCIDF Executive committee. I attended the following events but will report only on items 1, 2 and 12 since I was either the only South African delegate present or in the best position to report on the event. Other events are adequately covered by other delegates.

1. National Secretaries meeting
2. Secretaries dinner
3. Standing Committee on Dairy Policies and Economics
4. The General Assembly
5. Welcome reception
6. Opening Ceremony
7. Dairy Leaders Forum
8. Dairy Outlook 2019-2020
9. IDF-IFCN Workshop: Dairy Outlook 2020
10. Dairy as nutritional base to nourish the world
11. How to maximize dairy's contribution to SDGs
12. Meeting with IDF DG and Head Office staff about WDS 2020

1. NATIONAL SECRETARIES MEETING

The National Secretaries from 25 countries met at 09:00 on 20 September 2019 and continued until 17:00. Also present were IDF President, Judith Bryans, IDF DG, Caroline Emond, SPCC Chairman, Piere-Christiano Brazzale, E Grande (FR) – IDF Treasurer, T Avrech (IL), and R Maynard (CA). Besides the normal items, the following points on the agenda were discussed.

1.1 DF World Dairy Summit in Istanbul - Nevzat Artik

Prof Artik, member of the Organizing Committee gave a short overview of what could be expected of WDS 2019. At that stage, three days before the summit started, they had 950 registered delegates of whom approximately 600 were international delegates. He said that it compared favourably with Belfast (1 000) and Daejeon (1 200). (Ultimately, according to delegate lists provided, there were 1 241 registered delegates at WDS 2019). Dr Bryans remarked that the tendency seemed to be that delegates register later for the summit indicating that the Early Bird and Standard registration fees are of lesser importance to delegates than their diaries. The Farmers Forum was also raised by Ms Helen Dornom. She expected about 50 dairy farmers to turn up for the tours and Roundtable and asked secretaries to encourage farmers in their countries to attend the Summits and Farmers Forum. She added that the purpose is to allow farmers to get together and talk freely about the main issues in different countries with the hope that there would be increased farmer participation at the 2020 World Dairy Summit (although it is recognized that it is difficult

for dairy farmers to leave their businesses for an extended period of time). To my question of whether only bona fide farmers are allowed, Ms Dornmomm replied that she would prefer farmers. Four main areas that are being focused on at the Roundtable, namely:

- Animal rights and the rise of veganism.
- The environment and implications for climate change, such as the Climate Change Response (Zero Carbon) Amendment Bill in New Zealand.
- Which new skills are required and which new production practices can be implemented.
- Nominations for future Roundtables.

It was agreed that the topics for the Dairy Farmers' Roundtable and the establishment of a "Farmers Group" would be added to the agenda for the Mid-year Forum in Brussels in May 2020.

1.2 Update from IDF

1.2.1 Report by the IDF President

Dr Judith Bryans expressed her gratitude to the Turkish hosts for the excellent job that they had done in organizing the Summit and said that her presentation would cover four key areas.

• Elections

Judith explained that there were two Board positions that needed filling being the NC Secretaries representative and another for Dairy Sector (processing). She was delighted that two such strong candidates - Helle Huseby (NO) and Sharon Mitchell (NZ) - had put themselves forward. She explained that each suitably nominated candidate would present him /herself at the General Assembly for voting by all National Committees.

• Finances

The President reported that 2018 had resulted in a loss of €384,096, mainly due to exceptional costs of €451,840 (including the IDF restructure), but these had been offset by €67,744 as a result of operational savings. Caroline Emond reminded everyone that the exceptional costs were, indeed, a one-off cost that would not be a regular feature. The latest estimates for 2019 are that the year will end, as planned, with a balanced budget and the budget for 2020 is expected to show a slightly positive result, primarily due to a 2% increase in subscriptions to allow for the salary indexation as required by Belgian law. Helen Dornom (AU) and Andrzej Babuchowski (PL) pointed out that membership would be difficult to pay for various reasons. The EDA and IDF cost Poland in excess of €100,000 so he needs to be able to justify the benefit of participating in IDF work. Guillaume Tessier (BR) added that a number of countries have an "informal sector", from which it is not possible to raise membership subscriptions so he only has 30% of the total production from which to raise the funds for the annual subscription. Judith pointed out that IDF receives a fee from World Dairy Summits but the registration fees are set by the local Organizing Committee. She said there is the possibility of a dual rate for registration fees (for IDF members and non-members). Andreas Aeschlimann (CH) raised the subject of funding for the World Dairy Situation report to which Caroline Emond replied that in 2020 it will be distributed free to all participants as part of the contract that has been signed with the South African National Committee.

• Rules of order

Judith Bryans outlined the proposal that new Associate Members would only be able to remain as such for a maximum period of two years before they had to graduate to full membership. Eric Grande is leading a team that is examining alternative methods for determining the membership fees for each country and he explained that he has been trying to devise a method for lower subscriptions for smaller countries, but some larger countries are also struggling so it has been difficult. Caroline added that IDF has to have a diverse but active membership and the continuing development of technology (such as holding meetings using Zoom video conferencing) means that all members are able to contribute.

- Strategic review
Judith said that a document containing the IDF Strategy had been circulated in May and the comments received would be incorporated before the document would be circulated more widely for additional comments.

1.2.2 *Update by the IDF Director General - Caroline Emond*

In order to fulfill the IDF priorities, the IDF Head Office team is focusing on five main areas:

- Promote dairy as part of sustainable food system and diets
- Standard setting and scientific advice to IGO consultations
- Support the organization and promotion of the WDS2019 Istanbul
- Support the delivery of the SPCC priority items
- Identify risks and opportunities and science gaps for the sector

The HO team has now returned to full strength following the appointment of Nicola Gough as Communications Manager.

Positive comments were received on the joint meeting of the IDF Board, SPCC and National Committees held during the IDF Mid-year meetings and the plan is to replicate this format next year. In terms of communications, an IDF Communications- Strategy and Planner 2019 had both been drawn up and work is ongoing monitoring media reports. The 2018/19 Annual Report, showcasing IDF's outstanding scientific and technical work, will be released on the IDF website on 23 September. It contains details on the priority activities and a new "highlights" section giving an "at a glance" update on the main successes. A highly successful Mastitis Conference was held in Copenhagen in May and other events included an "Enjoy Dairy" rally, the World Milk Day, World Environment Day and The Role of Ruminants in Sustainable Diets. The second edition of the Dairy Sustainability Outlook was issued in July and IDF issued a joint statement with GDP in response to the Intergovernmental Panel on Climate Change (IPCC) report on the global impact of climate change to redress the misleading findings of the report. IDF participates in GASL and LEAP with Caroline Emond as the Chairperson of LEAP for 2019.

1.2.3 *Update by the SPCC Chairperson - Piercristiano Brazzale*

He said the main priorities continue to be to prioritize the IDF Work Programme and to revise the system to evaluate New Work Items.

There are eight priorities for 2019, namely:

- Dairy Declaration of Rotterdam – a first report on measuring and reporting on the sustainable development of the dairy sector needs to start to show the contribution of the dairy sector to helping achieve the UN's 17 SDGs.
- Codex Food Additives Alignment – A number of food additive provisions in the dairy categories of Codex General Standard for Food Additives have been adopted. A second set is under discussion and a final set is under preparation for Action Team review.
- Front of Pack/Nutrient Profiling – an Action Team is having discussions to determine the next steps that need to be taken. Work on composition has not yet started.
- Codex review of IDF/ISO standards – over 60 Standards have been referenced. Some changes have been made and the review is continuing.
- School Milk – a Bulletin summarizing the analysis of the responses received from NCs to the survey conducted earlier this year. A literature review is due to be published in November.
- Plant-based beverages – The IDF Task Force is aiming to complete its work this year on compiling and analysing data on plain milk and specific plant-based beverages to prepare a science-based document to counteract any misconceptions. Next, work will focus on solid products, such as cheese, and identifying differences between these and liquid-based products in terms of their nutritional and environmental benefits/impacts.

- Dairy Protein – a Joint FAO/WHO Expert Meeting on Nutrition (JEMNU) was held in July and considered work on nitrogen to protein conversion factors for soy-based and milk-based ingredients used in infant- and follow-up formulas. A further Codex meeting is planned for November. National Committees are encouraged to have a strong engagement with their Codex representatives to help develop positions for the forthcoming meeting.
- Emerging risks of chemical contaminants – work is on track and the first draft of the technical paper on chlorates is now under review by experts from the relevant Standing Committees (SCRCC, SCFM, SCAMAC and SCMHC) before being sent to National Committees for approval. This will be used as part of the process to prepare a guide to prevent contamination along the dairy chain.
- Over the course of the past year, IDF has produced three joint ISO/IDF Standards, seven Bulletins, six factsheets, the Animal Health Report No 12 and Dairy Sustainability Outlook issues 1&2.
- **Future work for 2020 includes:**
 - ISO standard: enumeration of characteristic microorganisms in yoghurt
 - IDF/ISO standard for the determination of sugars in dairy products
 - AOAC/IDF/ISO Standard for determination of amino acids in infant formula
 - Interpretation of Goat Milk Somatic Cell Count (SCC)
 - Solid Waste Management
 - IDF engagement in the Committee on Food Security (CFS)
 - Reviewing the science relating to ultraprocessed foods and diet quality
 - Microbial food preservation to keep food fresh and safe: bioprotection
 - Guidelines on process environment monitoring

There will also be a permanent item on the SPCC agenda for Issues for the Dairy Sector not yet Covered and NCs are encouraged to submit suggestions for subjects to be covered.

Debra Wendorf-Boyke (US) said that, with the addition of a further 19 New Work Items, there is a need to prioritize. Piercristiano replied that his intention is to have five priority items and he is going to ask SCs to cancel work that is not progressing and to ensure that each Action Team has an active leader and formalized timeline.

There is also a need to decide when to abandon work, and identify why the work was not completed, so lessons can be learnt for future work. Caroline Emond said it is time to “clean up” the work programme and question whether each item should still be included in the Work Programme.

1.2.4 IDF Science & Standard Programme Managers

Dr María Sánchez Mainar explained that she would be highlighting the main projects that IDF had been progressing on between May and September. She opened with a review of the Nutrition & Food Policy area, highlighting the following topics:

- Protein from a dairy perspective – The focus is on setting the nitrogen conversion factor for milk and soy ingredients for infant formula and follow-up formula.
- IDF will be engaging in the 41st Session of the Codex Committee on Nutrition and Foods for Special Dietary Uses in November and she urged as many experts as possible to participate, both within national delegations and via IDF.
- IDF also participated in the Codex Alimentarius Commission (CAC) in Geneva in July, where the Codex Strategic Plan for 2020-2025 was adopted.
- Science-based data relating to plant-based beverages, was collected, reviewed, and circulated to nine SCs for approval and this will be used to develop key messages to feed into a communication framework targeting 10 different target audiences.

- The SC on Standards of Identity and Labelling has conducted a survey on the protection of dairy terms. The results submitted by 16 countries will be discussed to determine what further actions are necessary.
- IDF has been collaborating with ISO on the definitions of vegan and vegetarian.
- The results of a comprehensive survey on “The Contribution of School Milk Programmes to the Nutrition of Children Worldwide” will be released by IDF as a Bulletin in November.
- A Joint Action Team has been working on a nutritional and socio-economic framework to show the impact of modifying dietary guidelines, including changing from three to two servings, to provide high level messaging.

On Dairy Safety and Quality, María reported that:

- A number of food additive provisions in the dairy categories of the Codex General Standard for Food Additives have been adopted. The amendment to the food additives section for the Codex standard on Mozzarella was confirmed and the work done on 13 standards for ripened cheeses was adopted.
- SCMh has been focusing on the Ecology of listeria in dairy production and a factsheet on Bioprotection.
- An Action Team prepared a technical document on chlorates for review and NCs will be surveyed about topics of concern and available expertise. She issued a call for experts with knowledge of chlorates, microplastics and radioactivity in dairy products to get in touch with her to help progress the work on emerging contaminants.
- In the area of Methods of Analysis and Sampling, primary focus is on a review of dairy methods in Codex Standard 234 dealing with Recommended Methods of Analysis and Sampling which is about 75% complete.
- Further work includes the Determination of moisture/water in dried milks, Milkfat purity and “Presumptive” *Lactobacillus acidophilus*.
- The Analytical Week, held in Prague in June, had resulted in two New Work Items, seven projects progressing to the IDF work programme, eight IDF/ISO Standards or ISO Technical Specifications/IDF Reviewed Methods to be published within 12 months and four IDF Bulletins due to be published within 12 months.
- The 2020 Analytical Week will comprise a new, shortened format with fewer AT and SC meetings. Other analytical SC meetings are due to take place prior to the 2020 World Dairy Summit.

Concluding the technical review with an overview of Sustainability, María spoke on the following topics:

- The Dairy Farmers Roundtable has been a very successful initiative with 16 countries participating during the Summit.
- The first meeting of the Academy of Experts is due to take place during the Summit. This platform is to encourage scientists to share their knowledge and to have their own community.
- A Roundtable on National Sustainability Programmes will also take place during the WDS, featuring contributions from Germany, Australia, Chile and the United States.
- An invitation will be circulated to all NCs to host the next IDF Mastitis Conference in 2023.
- An IDF Bulletin on Wastewater Treatment in Dairy Processing was issued in August.
- Future publications include a new factsheet on the Manufacture of Milk Protein Concentrates and Isolates by Membrane Filtration and two publications on Animal Health and Welfare to be issued in November on Definitions of new & cured mastitis and Guidelines on the use of sensors.
- IDF will be inputting into a number of events, including:
 - The EU H2020 project on AMR (via a webinar on YouTube in December).
 - The ninth Global Agenda for Sustainable Livestock Multi-Stakeholder Partnership meeting, entitled Innovation for Sustainable Livestock Systems, from 9-13 September in Manhattan.
 - The Livestock Antimicrobial Partnership (LAMP), featuring Reducing AMR with good practices and The case of bovine mastitis – a leaflet is to be sent to NCs.
 - The Animal Welfare Action Network highlighting the Dairy welfare contribution to SDGs.
 - Phase 3 of LEAP with an opening meeting in October in Rome.
 - A side event on Water use on the livestock sector for LEAP at the COP 25 being held in Madrid in December.

- The second IDF Dairy Sustainability Outlook was issued in July containing news from member countries and updates on global initiatives from DSF, SAI Platform and FAO LEAP.
- Upcoming work will include:
 - Energy saving in dairy processing
 - Solid waste management in dairy processing
 - Preparation for the 2020 IDF World Dairy Summit in Cape Town

1.3 Upcoming events

1.3.1 *World Dairy Summit 2020 - Cape Town*

I outlined the event with the aid of a few slides and the Summit video. The prospect of visiting Cape Town attracted a good applause.

1.3.2 *World Dairy Summit 2021 - Puerto Varas, Chile*

Octavio Oltra Hidalgo presented an overview of the event, which will have the theme of "Working for a Better Life" and will run from 4-11 November (business meetings from 4th - 7th, conferences 8th - 11th and Technical Tours 9th - 11th).

1.3.3 *IDF World Dairy Summit 2022 in New Delhi, India*

It is planned that the 2022 Summit will be based in New Delhi and will take place on dates yet to be arranged between the 2nd and 4th weeks of November. The event will concentrate on all the UN's 17 Sustainable Development Goals and the topic of empowerment for women will feature strongly.

1.3.4 *Cheese Science and Technology Symposium*

Pierre Doyle (CA) reported that the event will comprise the Novalait Forum Techno on June 1st, The Cheese Expertise Centre (CEC) Artisan Cheesemaker's Workshop on Tuesday 2nd, the IDF International Cheese Science and Technology Symposium (with six sessions over June 2nd to 4th), the FIL-IDF Canada Dairy Outlook Seminar on June 3rd and 4th and technical visits on June 5th).

1.3.5 *IDF/ISO Analytical Week June 2020 - China*

Jingquan Fang reported that next year's IDF/ISO Analytical Week will take place between 6 and 9 April at the China National Convention Centre in Beijing. The IDF MSSG meeting is on 6 April, together with a technical tour and the Welcome Reception; the 7th will feature the Opening Ceremony and the International Dairy Analytical Methods and Standards Symposium and the 8th and 9th have been reserved for Standing Committee and Action Team meetings. Registration at www.idfisobeijing2020.com will be available shortly.

1.4 Progress of actions from NC Workshop held in Daejeon in October 2018

Sharon Mitchell (NZ) reminded everyone of the project initiated by the IDF President on how IDF National Committees could work more effectively individually, collectively and with IDF Head Office. Four key focus areas were identified, namely:

- National Committee Effectiveness (the way we work within our own NCs)
- Effectiveness of National Committees working with IDF – Work Programme
- Effectiveness of National Committees working with IDF - Ways of Working
- Effectiveness of IDF overall and in Working Groups

The responses to a survey that was developed by a working group were presented at the mid-year meeting in Paris in May where it was discussed and updated for consideration at this meeting as contained in items below.

1.4.1 *Update of the NC Secretaries Manual / Handbook*

H Huseby (NO) said the manual is intended as an internal IDF document to set out the role and work of a NC and what is expected from them and also for new members to assist with the establishment of a new National Committee. AT found that the manual is very good but there are elements missing like succession planning, an updated organization chart and a one-pager explaining who IDF is and what it does. It should also be interactive, easy to read and more visual. They propose splitting the manual into two documents, a manual describing the role and work of National Secretaries and Guidelines on how to build a National Committee. The five key areas that need addressing:

- *Liaison* – contact between NCs and IDF HO, participation in NC Workshops, management of NWIs and questionnaires, assistance with the development of the Programme of Work.
- *Network* – engagement with existing experts and attracting new experts, contact with other NCs and interacting with Government, IGOs and industry.
- *Administration* – maintain and update documents, maintain database of national experts, organization of national Open Days, payment of IDF subscriptions and control of national budgets.
- *Communication* - circulation of documents to and from IDF HO, distribution of IDF press releases, newsletters, factsheets etc, preparation of national communication tools and dealing with national media.
- *Promotion* – using available IDF material and communication tools to promote IDF at national level.

1.4.2 *Proposed new template for NC Secretaries Country report*

Time will be allocated at the IDF NC Secretaries Mid-year Forums to exchange information and learn from each other. It was decided to prepare a new, one-page template for NCs to complete in advance of the meeting in May in Brussels, which would focus on work as the NC Secretary, rather than price and production trends, which are already covered by the SCDPE.

1.4.3 *Standard template of NC page on IDF website*

Work is ongoing on the possibility of including a page for each IDF member country on the IDF website and how this can be achieved – it may be possible to host existing country websites, but this would have financial implications. IDF Head Office will continue to investigate the possibilities and provide an update when more information is known.

1.4.4 *Evolution and update of the Private workspace on IDF intranet*

Apolina Fos gave an update on changes made to the Private Workspace of the NC's folders of the IDF Intranet.

1.5. Election of the NS Representative to IDF Board

The two candidates for the vacancy for the NC Secretaries' representative on the IDF Board - Helle Huseby (NO) and Sharon Mitchell (NZ) - were invited to give a brief presentation to the meeting on what they believe they can bring to the position and how they see the group developing.

2. SECRETARIES DINNER

It has been tradition for many years for the WDS host to invite all National Secretaries at the Summit, to a dinner on the evening after the NS meeting. The dinner was held at the Kiva restaurant, virtually next door to the Summit venue. The following pictures will tell the story.

3. MEETING WITH IDF DG AND HEAD OFFICE STAFF ABOUT WDS 2020

The following persons were present:

IDF delegation

Ms Caroline Emmond –DG.
Ms Aurelie du Bois –Dairy Safety & Quality manager
Ms Apolina Fos –Office & Members Management.
Ms Laurence Rycken – Nutrition & Food Policy manager
Ms Nicola Gough – Communications Manager
Dr Maria Sanchez-Mainar – Sustainability manager

SA delegation

Dr Chris van Dijk – Member OC2020 and Chairman Programme Committee.
Mr Jompie Burger, OC2020 Programme Committee.
Ms Christine Leighton, OC2020 Programme Committee.
Mr Edu Roux – Secretary OC2020.
Mr Stephan Steyn, OC2020 Programme Committee.
Mr Bertus van Heerden, MPO.
Ms Maretha Vermaak, OC2020 Programme Committee.

3.1 General matters

- 3.1.1 Regarding attendance, the Local Organizing Committee (LOC) is budgeting on between 900 and 1250 delegates and it is planned to keep the registration fees at €900, €100 less than in Turkey. Registration for WDS 2020 will open in early January.
- 3.1.2 IDF HO requested to be supplied with as much information as possible about the Summit in order for them to promote WDS 2020. This information should include agendas and progress reports containing registrations to date, sponsorships, exhibitors etc. IDF will supply a checklist/format for the progress report.
- 3.1.3 IDF will as a trial, be selling videos of some speakers' presentations. They will keep the LOC informed of progress with this project.
- 3.1.4 IDF's concerns about demonstrations at the Summit or areas that should be avoided by delegates were put to rest by South Africa but warnings will be issued to delegates to keep clear of certain areas, as in any country.
- 3.1.5 A timeline of actions will be supplied to IDF as requested.
- 3.1.6 IDF informed the meeting that Esada will continue with their 2020 conference in Uganda but will send delegates to WDS 2020 and will promote the Summit at their event. They suggested that an African Farmers event may attract more delegates from Esada members and other African states.
- 3.1.7 IDF stated that the side events at WDS 2019 were successful despite not being on the programme and not well advertised. The main hall was however not conducive to a successful smaller event because it was far too large for the audience. They felt that the concept and content were good but the execution could be improved.
- 3.1.8 Comments received by IDF indicated that the Farmers' Programme was very successful and the best day for it is Sunday. South Africa responded that the LOC had a discussion with Helen Dornom (AU) and the preliminary planning for the Farmers' Programme in 2020 is in place.

- 3.1.9 The fact that rooms for the 2012 business meetings were not together (and some not on the same level), made it difficult for attendees to network during breaks and lunches. IDF asked that this matter be addressed by the LOC and South Africa undertook to do so.
- 3.1.10 IDF mentioned that a lot of the exhibitors products and equipment got stuck at customs on Turkey's borders and asked that South Africa make sure this does not happen there in 2020.

3.2 The conference programme

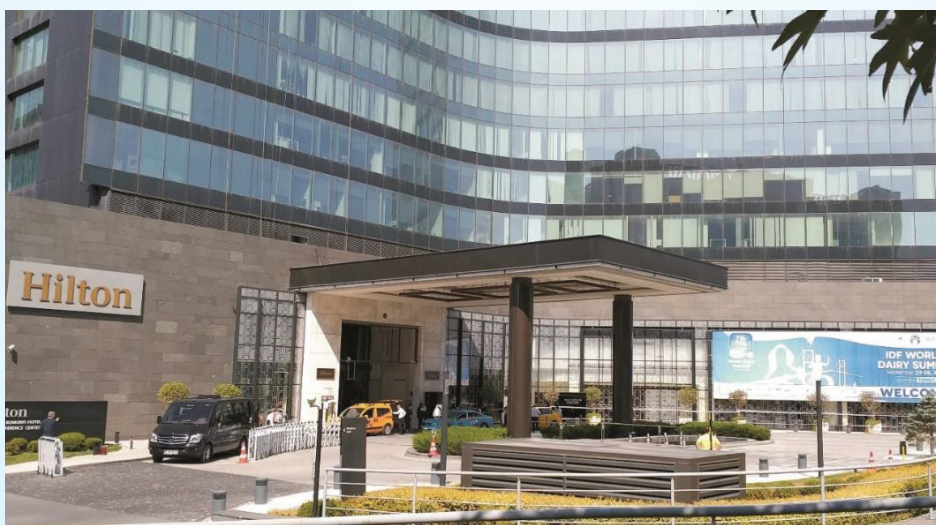
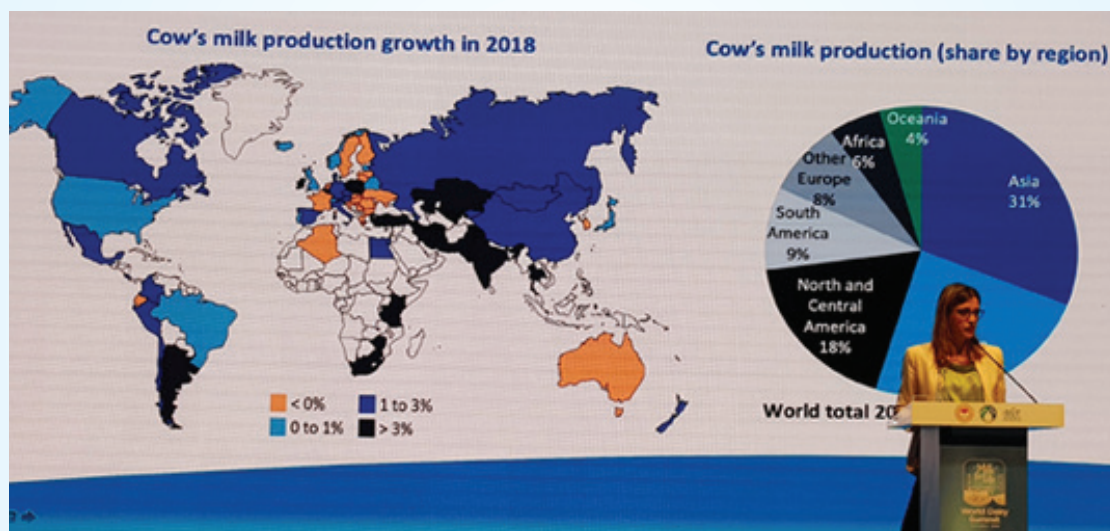
- 3.2.1 IDF mentioned that comments on the 2019 programme were mainly positive. Audience engagement did however, not work, probably because the app did not work and the filtering of questions was too strict.
- 3.2.2 South Africa detailed the programme that was agreed upon during a conference call with IDF in September. We pointed out that, although the number of plenaries and sessions remained the same, the broad topics doubled resulting in fewer plenaries and sessions per broad topic. This would result in fewer in depth presentations and discussions.
- 3.2.3 IDF commented that, for reasons unknown at the time, most of the executives from milk processors left the Turkey conference on the Monday afternoon and this is something South Africa should look into. South Africa suggested the possibility of moving Animal Health and Farm Management to the last day and IDF agreed that everything should be done to make the programme as attractive as possible.
- 3.2.4 It is also the responsibility of LOC to ensure that local speakers are as good or better than international speakers – which was not always the case in Istanbul. SA replied that the Programme Committee (PC) will have a proper evaluation system in place to ensure only acceptable local speakers are on the programme.
- 3.2.5 According to IDF, the programme must be designed to make day one an overview, the plenary sessions inspirational and the individual sessions the opportunity for in depth presentations and discussions. Use can be made of speakers from international organizations like FAO, OIE, WHO etc. They can be especially helpful with the inspirational messages. SA responded that the intention of the PC with the plenary sessions was to get everyone exposed to the different work areas. They also confirmed that the PC will look at the possibility of hosting technical side events as an opportunity for more specialized discussion events.
- 3.2.6 IDF said they had identified experts willing to help in several areas and asked who the SA champions are of each subject. They should rather consult IDF staff than SCs. Asked if the SCs should not be involved more with the programme as they are the experts in the different fields, IDF replied that they will contact the right persons in each SC.
- 3.2.7 South Africa would like delegates to come to the Summit to learn about the future, not to hear what happened in the past. IDF agreed that the narrative in Cape Town should be exactly that, looking into the future, what we need, what is missing, what the prime technology is and what the optimal way for the future is.
- 3.2.8 To IDF, the most important criterion for the success of the Summit, is the quality of the speakers. Speakers must be dynamic, well understood, inspirational, know their topic – in short, the best speaker. It is difficult to promote a Summit if it does not have excellent topics and the best speakers. South Africa will see to it that PC sources the best speakers and will start with the champions' contacts on the SCs and then take the search further to persons who has been reported in scientific and popular media.

THE 2019 WORLD DAIRY SUMMIT HELD IN ISTANBUL, TURKEY

An abstract will be required from every potential speaker and once selected, a presentation must be submitted well in time for scrutiny. South Africa added that from the abstract, the speaker could be asked to move more in one or another direction.

- 3.2.9 IDF undertook to follow up the possibility of having Bill Gates as a keynote speaker. There is also a possibility of having the CEO of FAO as a speaker in Cape Town, maybe not in person but at least on video and they will follow this up. South Africa enquired if it was desirable to have purely motivational speakers. IDF replied that it is up to the PC but that WWF could be approached in this regard.
- 3.2.10 It is the feeling of South Africa that speakers should not use the Dairy Leaders Forum to tell delegates of their companies' achievements but rather to speak about developments in the dairy industry. IDF felt that you cannot expect a CEO to do a presentation without mentioning his company. They suggested that the choice of topic and speaker should be considered carefully to avoid this problem.

MILK PRODUCTION



THE 2019 WORLD DAIRY SUMMIT HELD IN ISTANBUL, TURKEY



Above: IDF Standing Committee on Environment meeting in progress (Copyright IDF).



The starters



Secretaries, partners and IDF



Above: In attendance at the World Dairy Leaders Forum, 23 September 2019.

NOTES

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.