2 SUMMIT DAILY

WEDNESDAY, September 23, 2015

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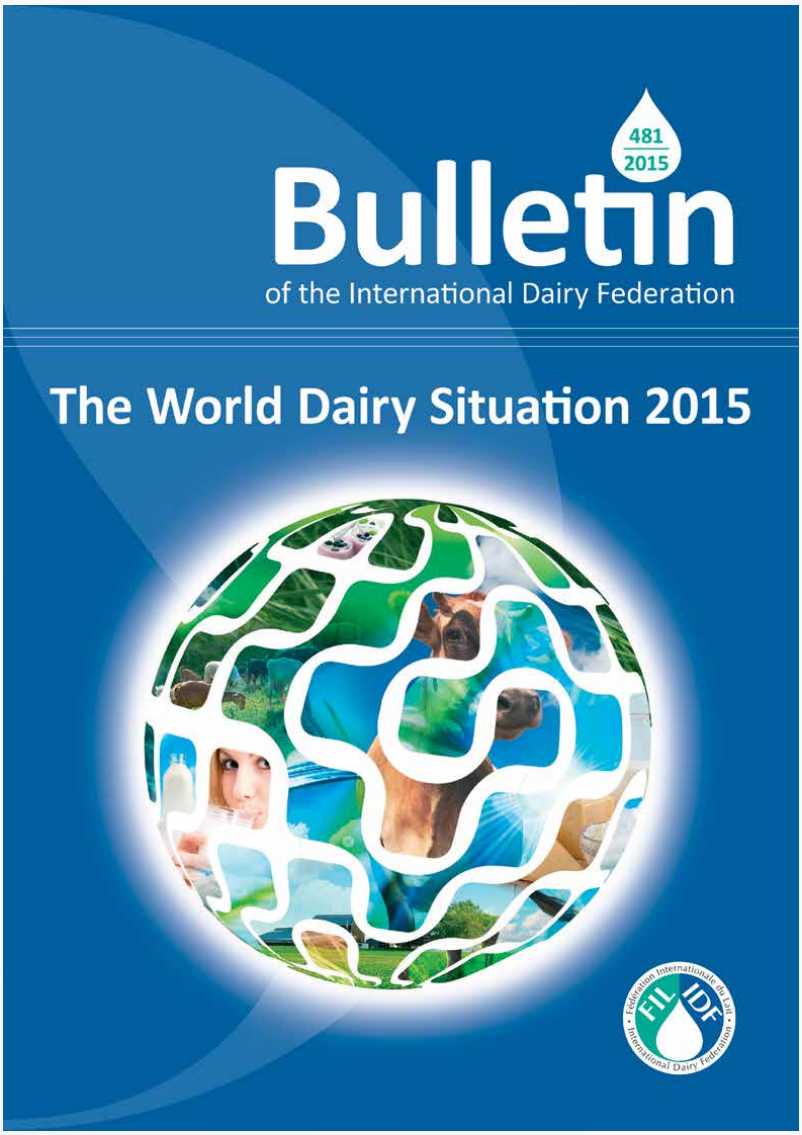
Your questions and comments are welcome! Please get in touch with us by e-mail at media@idfwds2015.com.

THE WORLD DAIRY SITUATION 2015 AT A GLANCE

This highly valuable publication is produced annually as part of the IDF's mission to represent and support the dairy industry globally. The report contains a wealth of data tables, graphs, analyses and information on the international dairy sector starting with milk production, and moving to processing and consumption. It also covers trade and pricing for more than fifty dairy producing countries from all five continents.



In addition to official data from various sources, country reports are based on questionnaires filled in by IDF National Committees, as well as other national contributors. The report not only offers the most complete and detailed overview of the dairy situation as possible, but also the opportunity for individual nations to present information on their own dairy sectors.

The year 2014 was characterized by the start of a market turnaround. Total milk production was estimated at around 802 million tonnes, a significant increase of +3.3% compared to 2013. Abundant milk deliveries led to further output of most dairy categories, especially milk powders and butter. World dairy trade developed accordingly, showing solid increase on the whole and representing nearly 9% of global milk production. This did not prevent dairy markets plummeting almost continuously until 2015. On average, farm gate milk prices reached record highs in 2014 before a serious downward trend.

Mergers and acquisitions are still intensifying and becoming increasingly global. International projections expect a population of 9 billion inhabitants in 2050, and thus an increased need for food in the coming decades. In 2014, global per capita dairy consumption was estimated at 110.7 kg. According to the OECD and FAO, it should increase by 13.7% by 2023. Consumption should increase all the more in developing countries.

The report aims to give an outlook of the latest dairy data in the world, from the production, processing, industry, consumption, trade, and prices perspectives. Current trends and expected evolutions are assessed in depth.

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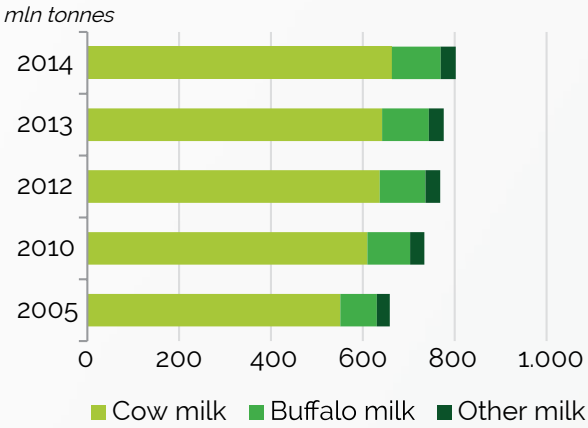
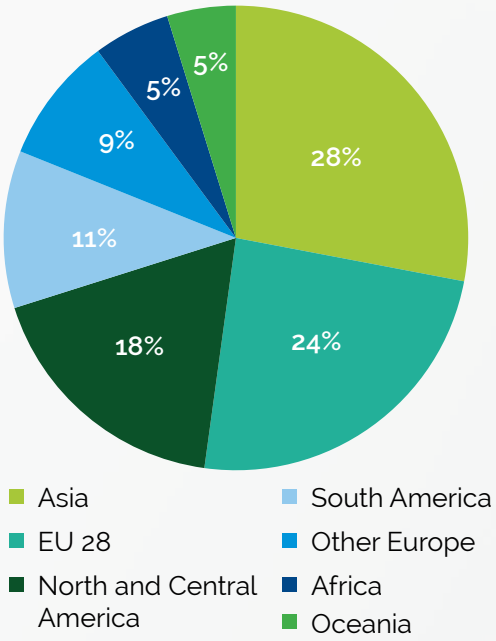
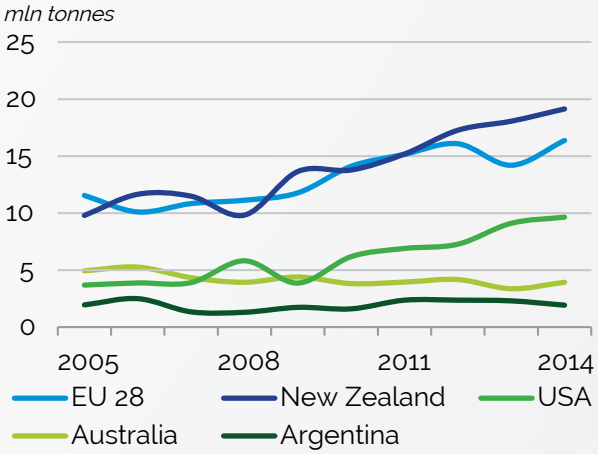
World: milk production by species



World: cow's milk production (share per region)



World trade: top 5 exporters*



*In milk equivalent

NUTRITION AND HEALTH CONFERENCE

Marylène Tucci, IDF

On September 22, the Nutrition and Health Conference discussed the essential role dairy can have in contributing to nutrition security. It also addressed the latest research on bioactive components in dairy, and how these contribute to human nutrition and health. The conference was split into four sessions.

Session 1 focused on the Role of Dairy Products in Under- and Malnutrition. Stefanie Oude Elferink, Chair of the Standing Committee on Nutrition and Health of IDF and Senior Scientist at FC, kicked off the session by stressing that "despite progress in addressing micronutrient inadequacies in the world, several billion adults and children continue to be affected by one or more nutrient deficiencies and even those who consume sufficient energy for growth may not be nutritionally secure."

"Adequate nutrition is important for to function effectively, and it should not only encompass adequate macronutrient intake in the form of protein, fats and carbohydrates, but also adequate micronutrient intake such as vitamins and minerals. Dairy with its rich composition of macro and micronutrients can play an important role in this, as will be illustrated in the presentations of the other speakers in this session," she said.

Linking with the working activities of the Standing Committee on Nutrition and Health in this area, she mentioned the new IDF Bulletin 480/2015 *The Contribution of School Milk Programmes to the Nutrition of Children Worldwide* and the two recent factsheets *The Role of Dairy in Sustainable Nutrition* and *The Role of Dairy in Optimal Nutrition and Under-Nutrition – the First 1000 Days*, both available from www.fil-idf.org.

Her introduction was followed by a presentation delivered by Dr. Inge Brouwer on *Vulnerable People in Developing Countries. What Are the Main Nutrition Problems and Can Local Diets Solve Them?* Dr. Brouwer highlighted that the development of context specific and realistic food-based recommendations is crucial to improve the adequacy of the diet. However, recent mathematical modeling for optimizing local diets shows that modifications of the local diet may increase the coverage of several micronutrients, but, even when adopted fully, there will still be gaps in adequacy for several micronutrients that require solutions beyond currently available foods and dietary patterns. "Behaviour change communication, agronomic approaches, value chain interventions and food-processor interventions are among possible solutions that may increase acceptability, accessibility and utilization of quality foods that can fill the nutrient gaps when consumed," she said.

Dr. Inge Brouwer

Prof. Marta van Loan presented the *Role of Dairy Foods to Ameliorate Malnutrition in Developing Countries*, in which she mentioned that "dairy and milk in particular has both energy and high quality protein, as well as a variety of micronutrients to help alleviate these deficiencies." She ended by saying: "To make inroads into the fight against malnutrition, food industries should work together to develop products that are self-stable, easily transported globally and locally, and provide high quality protein, energy and micronutrients."

Charlotte Pedersen from GAIN gave a presentation on the important role dairy solutions can play in addressing malnutrition. She stressed that increasing the general availability and access of milk, especially processed milk, increased value both for the farmers' and for the consumers' "wealth and health". She presented positive experience from India, which used milk products as an excellent vehicle for adding extra nutrition (vitamins) to tackle malnutrition.

Charlotte Pedersen

A closer look at the presentation PLACE OF DAIRY PRODUCTS IN A HOLISTIC VISION OF THE DIET

Prepared by Marylène Tucci, IDF

Dr. Anthony Fardet

Dr. Anthony Fardet started his presentation by stressing that to better grasp the real health potential of dairy products, it must be considered within such a holistic perspective, not based on isolated dairy products or components according to a reductionist perspective, as mainly realized until today. This involves studying the association of dairy products with all diet-related chronic diseases and their risk factors as a whole, the health potential of dairy products when they are included in a complex diet, and the impact of their production on environment.

He explained that their exhaustive study about the place of dairy products within complex diets showed that excluding dairy products from the diet does not necessarily reduce the impact on climate change but instead may have deleterious nutritional consequences.

Some highlights from the presentation:

- First, although evidence is heterogeneous with methodological limitations, a recent meta-analysis interestingly showed that saturated fats are not associated with all-cause mortality, cardiovascular diseases, coronary heart disease, ischemic stroke, or type 2 diabetes.
- Secondly, contrary to what could have been expected, our results clearly showed that dairy products are either neutral (milks, yogurts, other fermented milks and cheeses) or protective (total dairy) against cardiovascular disease risk.
- Thirdly, when studying literature, it seems that cheese tends to be consumed more in association with foods found in the Western diet than with the healthy diet, leading nutritionists to advice consume rather low-fat dairy. However, literature shows that cheese, when studied in isolation, is either protective or neutral towards chronic disease prevalence and their risk factors. Therefore, it seems that all dairy products may well participate in a healthy diet, provided daily diversity is realized: this means consuming milk, yogurt and cheese once a day.

DAIRY POLICIES AND ECONOMICS CONFERENCE

Global and Regional Challenges to Economic Sustainability of the Dairy Supply Chain

Session 3: the Restructuring of the Dairy Sector

Gilles Froment
Canadian Dairy Commission
IDF Standing Committee on Dairy Policies and Economics

On September 22, the programme devoted to Dairy Policies and Economics dealt with Global and Regional Challenges to Economic Sustainability of the Dairy Supply Chain. The conference was split into four sessions.

The 1st session focused on Global Milk Changes in the Dairy Sector and Forecast. As an opening, Indrė Genytė-Pikčienė (LT) presented an overview of the strengths and challenges of the dairy sector in Lithuania. Following this, Véronique Pilet (FR) offered the traditional presentation on the World Dairy Situation 2015 and Dairy Outlook. The session concluded with Dr. Stephan Hubertus Gay (OECD) who gave an overview of the developments on trade policies and agreements.

The 2nd session dealt with Recent Dairy Policy Developments. The first speaker, Joost Korte (BE), gave an account of the dairy policies and the implementation of the 'milk package' in post-quota EU. This was followed by a presentation by Kevin Bellamy (NL) on managing risks in the context of continuing global dairy expansion. Rath Dilip (IN) then presented an overview of Indian dairy policies and the status of the National Dairy Plan in India.

During the 3rd session, speakers discussed the Restructuring of the Dairy Sector. To start off the session, Benoit Rouyer (FR) gave an overview of restructuring and investment trends in the dairy processing sector around the world, whereas Dr. Torsten Hemme explained the current status of milk production worldwide and expected development to 2025. The attention then turned to three specific cases for the development of milk production: Ukraine (Andriy Dykun), Brazil (Marcelo Pereira de Carvalho) and Russia (Mikhail Mishchenko).

The 4th session focussed on Dairy Sector Sustainability from an Economic and Policy Perspective. It started with the presentation on sustainable development of the dairy sector in Poland by Pawel Zareba (PL) followed by Sub-Saharan Africa by Kobus Mulder (ZA). The programme concluded by a presentation on social and economic sustainability of the US dairy sector by Dr. Andy Novakovic (US).

ANIMAL HEALTH AND WELFARE CONFERENCE

Sustaining Animal Health and Animal Welfare in Milk Production

Dr. Olav Østerås
TINE Advisory Services
IDF Standing Committee on Animal Health and Welfare

The conference on September 22 consisted of three different sections: one on prudent use of antimicrobials (AM) and antimicrobial resistance (AMR), one on infectious diseases, and one on animal welfare.

Elisabeth Erlacher-Vindel from OIE talked about AMR as an increasing global issue and one of the three priority topics for WHO-FAO-OIE. OIE is developing a global database on the use of AM in animals. The dairy sector is well advanced, but potential challenges for milk production might raise questions such as access to AM, preventive treatments, selective use of several AM classes and overall demand to reduce antimicrobial use. The keynote speaker was followed by four lectures about work done and experiences from IDF, Norway, Sweden and USA.

In the second section, Dr. Jonas Millius from Lithuania talked about the importance of epidemiology of infectious diseases for dairy production. After this overview, there was a lecture about bovine tuberculosis from UK. From Italy, a gene CD109 was presented as a potential candidate of immune response relevant for paratuberculosis. From Denmark, a work was presented looking at infection of S.agalactiae cows in relation to bulk milk bacterial count in milk. Finally, an overview on animal health control in dairy herds was presented from Lithuania.

In the third section, Prof. Dan Weary from Canada presented problems and solutions on animal welfare. Accordingly, there was a presentation on experience of screening on ketosis by FRTIR from Denmark. It addressed animal care concerns and building consumer trust through responsible sourcing guidelines for dairy producers. Dr. Ramūnas Antanaitis from Lithuania presented effects of monensin controlled release capsules on blood parameters of transition dairy cows. Finally, Roi Mandel from Israel presented the relation between use of 'low-resilience' behaviour like brush usage and some stressful manipulations.

Finally, the conference was wrapped up by presenting some results from the poster session as well as by a general discussion on all presented topics.

Dr. Olav Østerås

IDF ANIMAL HEALTH NEWSLETTER N°9 IS AVAILABLE!

The newsletter is produced with the primary aim of providing the IDF community with knowledge of current activities in the field of animal health and welfare. It contains short descriptions of recent research, including summaries of PhD theses, current activities in the Standing Committee on Animal Health and Welfare (SCAHW), different projects and campaigns from member countries and more.

The contributions are from members of the IDF SCAHW and their collaborators from all over the world. In this edition we present authors from a variety of countries in Europe and North America. This issue of the Animal Health Newsletter represents the broad nature of SCAHW very well, with contributions ranging from recycled manure and antimicrobial resistance to nutrition, mastitis pathogens and paratuberculosis.

It is available for free download at www.fil-idf.org.

IDF Animal Health Newsletter

Issue N° 9 - September 2015

Preface

Dear Reader,

The Standing Committee on Animal Health and Welfare (SCAHW) has successfully completed a ninth edition of the yearly IDF Animal Health Newsletter. The newsletter is available both electronically and as a paper copy. The newsletter is produced with the primary aim of providing SCAHW members and others in the IDF community with knowledge of current activities in the field of animal health and welfare. It contains short descriptions of recent research, including summaries of PhD theses, current activities in SCAHW, different projects and campaigns from member countries and more. The contributions are from members of the IDF SCAHW and their collaborators, from all over the world. In this edition we present authors from a variety of countries in Europe and North America. This is good, but for upcoming issues we hope for an even broader geographic distribution of authors. This issue of the Animal Health Newsletter represents the broad nature of SCAHW very well, with contributions ranging from recycled manure and antimicrobial resistance to nutrition, mastitis pathogens and paratuberculosis. I hope that you will find it both interesting and inspiring.

If you want to contribute to the IDF Animal Health Newsletter by providing us with the results of research or projects of interest to the dairy community, as well as information on recent or forthcoming meetings, do not hesitate to contact us.

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Contents

How dairy can contribute to nourishing a growing world population is the central theme of IDF-WDS 2016 Rotterdam.

DARE TO DAIRY

Dairy can only play this role in close collaboration with the global community. There is a lot at stake for dairy and the world and the question is:

DO WE DARE TO

... engage
... share
... innovate
... challenge
... dream

DO WE

... Dare to Dairy?

Fédération Internationale du Lait · International Dairy Federation

EXPLORE LITHUANIA

Lithuanian Language

Did you know that Lithuanian language is spoken by only about 3 million people all around the world? It is the oldest surviving Indo-European language, which has preserved the most aspects of the proto-language, which many other European languages come from. Lithuanian is related to Sanskrit (a classical language of India), Latin and Ancient Greek. It belongs to the Baltic language group, and Latvian is the only living language similar to Lithuanian.

Give it a try!

ENGLISH	LITHUANIAN	PRONUNCIATION
Hello	Labas	(LAH-bahs)
How are you?	Kaip sekasi?	(Kuyp SEH-kah-sih?)
Fine, thank you	Ačiū, gerai	(AH-choo, geh-RUY)
Thank you	Ačiū	(AH-choo)
You're welcome	Prašom	(PRAH-shom)
What is your name?	Koks jūsų vardas?	(Kawks YOO-soo VAHR-dahs?)
My name is _____	Mano vardas yra _____	(MAH-naw VAHR-dahs ee-rAH _____)
Pleased to meet you	Malonu	(Mah-law-NOO)
Yes	Taip	(Tuyp)
No	Ne	(Na)
Sorry/Excuse me	Atsiprašau	(Ah-tsih-prah-SHAOO)
Goodbye	Viso gero	(VEE-saw GHEH-raw)

WELCOME RECEPTION

NATIONAL EVENING