

TODAY

Global Dairy Roundtable

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summilk
IDF WORLD DAIRY SUMMIT 2011

With the technical
cooperation of the
Food and Agriculture Organization
of the United Nations



PARMA, ITALY 15-19 OCTOBER 2011

www.wds2011.com

Facts and Figures

Milk, butter, cheese and yoghurt represent over **12%** of the Italian food sector.

Every year Italy produces almost **3 billion litres** of milk.

Italian per capita cheese consumption accounts for **23 kg**.



Welcome Message



Richard Doyle

President of the International Dairy Federation

A warm “*benvenuto*” to you all here in Parma. This year’s event looks set to be another great success. I would like to sincerely thank the Italian National Committee and Fiere di Parma for all their hard work.

I am certain that the discussions held over the next five days will provide us all with invaluable new insight into a wide range of important topics.

The theme “Sustainable Food Security” is of great significance to the global dairy community, as we seek to reduce the industry’s environmental impact while increasing production. As dairy products are central to a healthy balanced diet, every stakeholder in the dairy chain has a key role to play in feeding the growing world population.

The Summit is the leading platform for sharing information, presenting recent developments, and benefiting from important networking opportunities. These include interactive discussions as well as one-on-one interviews with industry experts.

This year’s summit also serves as a testament to IDF’s highly successful collaboration with FAO, with five joint conferences in key areas of sustainable dairy production. Another of IDF’s fruitful collaborative efforts is its participation in the Global Dairy Agenda for Action, an outstanding global initiative promoting the dairy sector’s commitment to addressing climate change.

I strongly encourage everyone to make the most of the wonderful opportunities presented here.

It is a great honour for me to welcome all participants of the IDF World Dairy Summit 2011.

The Summit is held in Parma, in the heart of the Italian food valley, where the production of cow’s milk has ancient roots, dating back to 8 BC. In the year 1000 Cistercian and Benedictine monks set up their “grance” (farms), which were also equipped with dairies. The existence of a cheese called *caseus parmensis* (the present Parmigiano Reggiano) dates back to the year 1254.

The traditional production methods still live on in modern day dairies, which manufacture this cheese by ripening it on the big *scaleras* that resemble the columns of the Emilian

medieval cathedrals.

The summit is above all a platform for finding solutions to global dairy challenges. That is why the World Dairy Leaders Forum is so important. They will talk about fundamental elements of the Summit programme, and will introduce specialist meetings and poster sessions, all of them within the common theme “Sustainable Food Security”.

I wish all participants a wonderful stay here in Parma and a fruitful Summit experience, while I hope for the organisers that the Summit becomes a milestone for the dairy industry’s progress.

Cesare Corradini

President of the Italian National Committee of IDF



Global Dairy Roundtable

Not to be missed: the first Global Dairy Roundtable on Supply Chain Issues

Taking place tomorrow, Sunday 16 from 16.15 to 18.00 in Auditorium Paganini, the session addresses the theme “Working Together Towards a Sustainable Dairy Supply Chain”.

We’ve been talking to Yves Leduc, Director of International Trade at Dairy Farmers of Canada and coordinator of the event (CA), to get a flavour of what to expect.

What is the concept of a roundtable?

In a nutshell, it is to present participants with a particular issue and then encourage a dialogue. Representatives from across the dairy supply chain will be discussing how different segments can best work together to create a more sustainable dairy industry.

Sustainability is an extensive topic, and this roundtable enables us to consider all parts of the supply chain from environmental, economic and social perspectives. This is about bringing everyone together, as we share a joint responsibility when it comes to sustainable production.

What prompted the idea for a Global Dairy Roundtable?

This is the first time a roundtable has brought together the entire supply chain, although there have been five successful roundtables at farming level in the past. These increased synergy among dairy farmers, so much so that it seemed natural to broaden the scope of the discussion.

What format will the conference take?

We will begin by hearing the viewpoint of each representative. We have representatives for suppliers, farmers, processors, distributors and institutions. Then it’s a matter of encouraging open and lively dialogue. Alessandro Plateroti, Deputy Director of *Il Sole 24 Ore*, will be acting as facilitator.

Why is it important to have such an event at the IDF World Dairy Summit?

We must take advantage of the fact that stakeholders from across the globe are all here in one place. A worldwide, coordinated approach that involves the entire supply chain is essential for progress.

What do you hope to achieve?

Our objective is to create synergy among all stakeholders, and the first step must be to initiate a dialogue.

Tomorrow signals the opportunity to create greater collaboration across the value chain to meet our collective sustainability goals.



Yves Leduc

Director of International Trade
at Dairy Farmers of Canada

“ This is about bringing everyone together, as we share a joint responsibility when it comes to sustainable production. ”

“ A worldwide, coordinated approach that involves the entire supply chain is essential for progress. ”

Assuring the sustainability of the dairy sector

Panelists will include:

Paolo De Castro - Chairman of the European Parliament Commission on Agriculture and Rural Development;

Yvon Guerin - Parmalat CEO

Dennis Jonsson - Tetra Pak CEO

Wesley Judd - Dairy Farmer, immediate past President of Australian Dairy Farmers and Australian Dairy Industry Council and past President of the Dairy Group of IFAP

Almir Meirless - past president of Brazilian Long Life Milk Association

Claudio Sarah - political strategies for Nestlé Chile dairy sector

Rob Sheffer - Cargill Animal Nutrition General Manager Northeast US

Kostas Stamoulis - FAO agricultural sector manager

Antonio Tajani - Industry and entrepreneurship EU Commissioner

Strategies to face the challenge of a sustainable production for the future, are some of the key issues covered in this Forum. The moderator is Alessandro Plateroti, Deputy Director of “Il Sole 24 Ore”.

The imbalance between consumption and available resources has intensified over recent years, particularly concerning food security. Today, malnutrition, which historically grips specific areas of the globe, is now spreading across the planet.

One of the reasons for this worrying trend is the increasing vulnerability of the agricultural system, with reduced yields caused by intense climatic variations. The agricultural economy is more fragile because of its specific structural conditions, exposing agriculture to market volatility more than other sectors. In the last few years security of supply is high on the agenda of policy makers.

The conference will be addressing these important issues in order to understand the future requirements of the agricultural sector.

Concrete proposals for a sustainable dairy sector will be formulated.



Real Achievements to a More Sustainable Dairy Sector: The Global Dairy Agenda for Action

Not to be missed - The Global Dairy Agenda for Action Conference
on Wednesday 19 October in Hall A/B, Centro Congressi.

Join us and learn more about the tangible progress of the GDA, the dairy sector's commitment to making a positive contribution to addressing climate change.

To learn more, visit www.dairy-sustainability-initiative.org



Saturday 15th October

16:00

IDF Press Conference



17:30

Opening Ceremony



Sunday 16th October

09:00 - 10:30 - PLENARY HALL
IDF SWIFT

14:00 - 17:00

HALL H

Nutrition and Health

**Dairy Products:
a Healthy Choice**

11:00 - 15:45 - PLENARY HALL

World Dairy Leaders Forum

Sustainability a Challenge for the Dairy Chain

16:15 - 18:00 - PLENARY HALL

Global Dairy Roundtable on Supply Chain Issues

Working Together towards a Sustainable Dairy Supply Chain

20:00

Farmers' Dinner



Monday 17th October

09:00 - 17:30

HALL H

Nutrition and Health

**Dairy Products:
a Healthy Choice**

09:00 - 17:30

PLENARY HALL

Dairy Policies
and Economics

**Growth and
Sustainability**

09:00 - 17:30

HALL A/B

Methods of Analysis

**Innovative
Analytical Strategies**

11:00 - 18:00

HALL C

Animal Health,
Farm Management
and Milk Production

**Animal Health
and Welfare**

Tuesday 18th October

09:00 - 17:00

HALL A/B

Dairy Science
and Technology

**Novel Technologies
for Sustainable
Dairy Products**

09:00 - 12:30

PLENARY HALL

Dairy Policies
and Economics

**Growth and
Sustainability**

09:00 - 18:00

HALL C

Animal Feeding

**Sustainable Feed
Security**

09:00 - 17:00

HALL H

Marketing

**Conveying the
Benefits of Dairy
to Consumers**

From 19:30

Gala Dinner



Wednesday 19th October

09:00 - 11:00

HALL A/B

The Global Dairy
Agenda for Action

**Real Achievements
to a more
Sustainable Dairy
Sector:
the Global Dairy
Agenda for Action**

11:30 - 17:00

PLENARY HALL

Environment

**The Global
Environmental
Footprint of Dairy
Products**

09:00 - 17:00

HALL C

Food Safety

**Sustainable Food
Security - Prudent
Use of Antimicrobial
Agents**

11:00 - 15:30

HALL H

Nutrition Economics

**Sustainable Public
Health and Dairy
Nutrition
Economics**

A Closer Look

The role of dairy calcium in tooth and bone health through life stages

Be sure not to miss the two day Nutrition and Health conference, entitled Dairy Products, a Healthy Choice. The first session begins tomorrow from 14.00 to 17.15 in Hall H. The second session is on Monday from 09.00 to 17.15, also in Hall H.

Dr. Bill Aimutis, Research Fellow and Director of Global Food Research, North America for Cargill, Inc. (US) explains more about the importance of adequate dairy calcium intake.

What role does calcium play in ensuring healthy teeth and bones?

99% of the calcium in our body is in our teeth and bones. Both undergo constant demineralization and remineralization that requires calcium to maintain structural integrity. Without sufficient calcium in our diets, bone diseases like osteopenia and osteoporosis develop as we age.

How do our calcium requirements change as we age?

Our highest requirement for calcium occurs a couple of years before puberty and through our twenties. At this age it is critical to ingest roughly 1300 mg of calcium per day to prevent osteoporosis and oral health issues in later life.

Although genetics imprints our susceptibility to osteoporosis, the chances of developing this disease increase if we do not ingest enough dairy products as teenagers. By the time the symptoms manifest, often well into our fifties, it is difficult to reverse them.

“Without sufficient calcium in our diets, bone diseases like osteopenia and osteoporosis develop as we age.”

Parmalat: a key player at Summilk 2011

As well as to Parma, the 2011 World Dairy Summit will be associated to another great icon on the territory: Parmalat, the event's main sponsor and testimonial of the Italian and international industrial excellence.

Parmalat has actually married the values of the summit, that is considered as a crucial moment of confrontation for the Italian and international dairy industry. The food sustainability theme, intended as both access to food sources and certainty of healthy products, is and will have to be in the spotlight on the agendas of great industries that share with governments and organisations the responsibilities of a development that is increasingly more respectful of man and his environment.

Parmalat at Summilk is going to fully exploit the chance offered by its affiliation to the great Lactalis group. The newborn Group resulting from this acqui-

sition is the world leader in dairy products, enjoying a presence on every continent, with strong market positions and brands in all product categories.

Parmalat will be the protagonists at several events: the Opening Ceremony at Teatro Regio in Parma, of which it is the exclusive sponsor, and at two conference's sessions. Moreover Parmalat will be the co-sponsor of the gala dinner at Fiere di Parma. It will also host an important technical tour at its Collecchio-based facility.

Testifying its continuous commitment, Parmalat, on the same days of Summilk, also supports the Obesity Week with a workshop entitled "Homo Sapiens and milk: recent scientific advances" at Parma University Campus. This workshop has been organised with the support of Parmalat R&D department, in collaboration with the University Hospital company of Parma and renowned nutrition, paediatrics, geriatrics and metabolic disease experts.

Milk and Dairy production in Italy

Dairy is a leading industry on the Italian food scene. Milk, butter, cheese and yoghurt represent over 12% of the domestic food sector

Production

In 2010 the Italian industry processed over 13 billion litres of milk, generating 1 billion kg of cheeses, of which 462 million kg were Products of Designated Origin, 2.9 billion litres of milk, 1.8 billion yoghurt pots, 162 million kg of butter.



Cheeses: a tradition that has become industrial

Mozzarella is the undisputed queen of domestic dairy production: more than **250,000 tons** are produced every year by Italian dairies. Grana Padano ranks second (163,326 tons), followed by Parmigiano Reggiano (119,221 tons), the most imitated PDO Italian cheese.



Milk: technology working for consumers

Every year Italy produces almost **3 billion litres** of milk in many variants: fresh milk, UHT milk, HSL (extended shelf life) milk, special milks, with specific ingredients such as vitamins, omega 3 or enzymes to digest lactose. UHT milk ranks first in terms of volume produced and consumed in the country (55%), followed by fresh milk and special milks.



Yoghurt and probiotic fermented milks

In Italy about **1.8 billion pots** of yoghurt are produced, as well as other fermented milks.



Butter

Many Italian cheeses are produced with skimmed milk, thus the national butter production can rely on a continuous supply of cream.

Consumption Trends

● Milk

For some years per capita consumption has been stable: about 54 litres per year, far lower than the average in north European countries (90 litres per year)

● Cheese

Italian per capita consumption accounts for 23 kg: mozzarella is the best selling cheeses (5 kg per year), followed by ricotta, Grana Padano, Parmigiano Reggiano, Gorgonzola and Provolone.

● Yoghurt

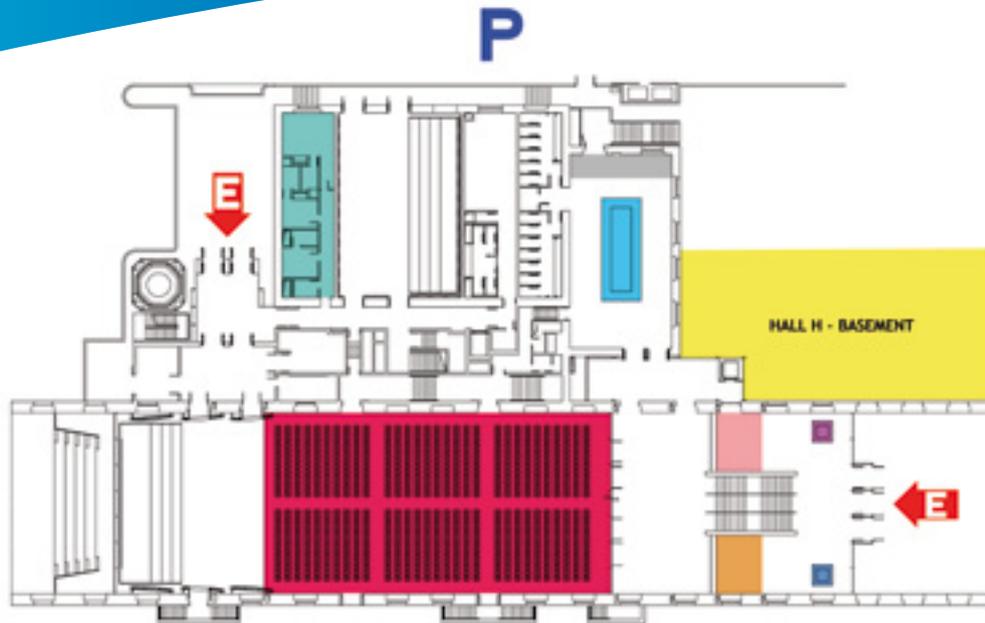
Over the years, the Italian people have started appreciating yoghurt and fermented milks. Per capita consumption today is close to 8 kg per year.

Butter

- Yearly butter consumption accounts for about 2 kg of product per capita. Consumption is more developed in North Italy and less in the South, where olive oil consumption prevails.

Summilk Map

Auditorium Paganini - 1st Floor



1 Plenary Hall

2 Hall B - Basement

3 IDF Office

4 Info Desk

5 Cloakroom

6 Registrations

7 Hotel Booking

8 Parking

9 Milk Bar  

Other Summit Locations

- **Farmers' Dinner**
Antica Corte Pallavicino - Polesine Parmense - Parma
- **Opening Ceremony**
Teatro Regio - Via Garibaldi - Parma
- **Gala Dinner**
Fiere di Parma - Viale delle Esposizioni, 393A - Parma



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