

Dairy Farmers of Canada AGM

Dr Judith Bryans, CEO Dairy UK and President FIL-IDF – Edmonton, July 2017

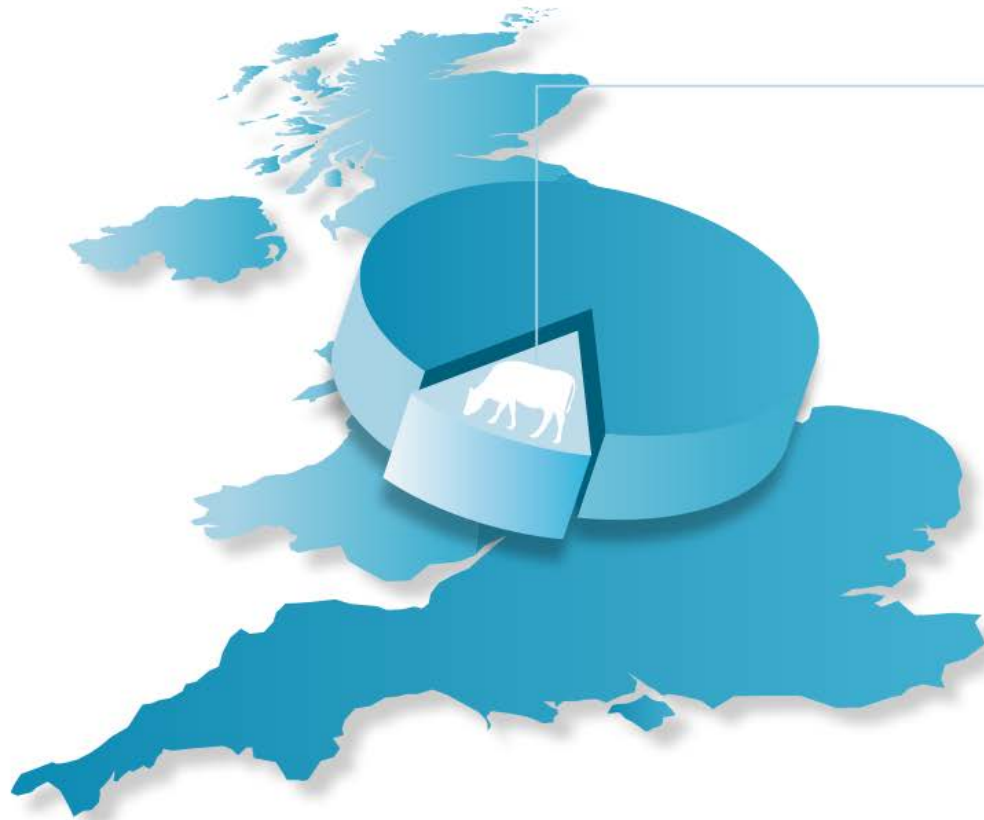




Our UK dairy story

Dairy | Value

VALUE OF OUR INDUSTRY



14%

of the value of
agriculture produce
at farm level.

£8.8bn

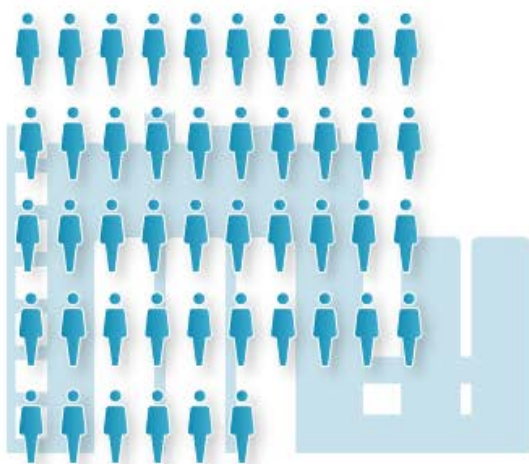
of sales at wholesale.

£27.8bn

aggregate turnover impact
estimated once indirect and induced
multiplier impacts are considered.

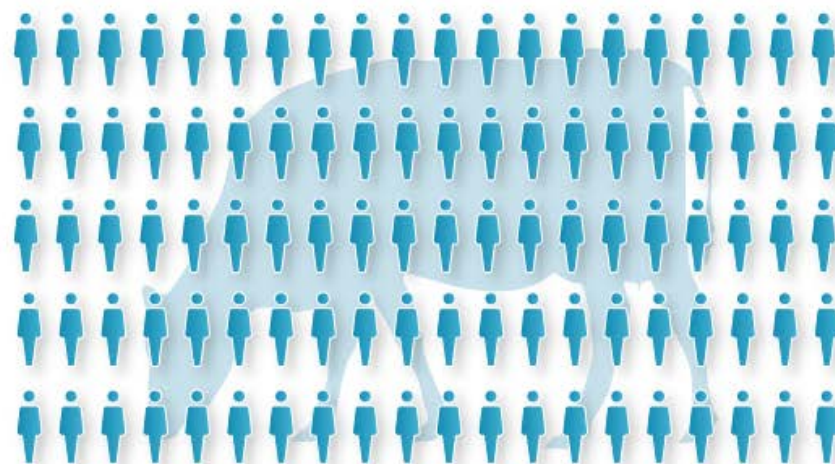
Dairy | Employment

DAIRY INDUSTRY EMPLOYMENT



23,000

Employed by processors

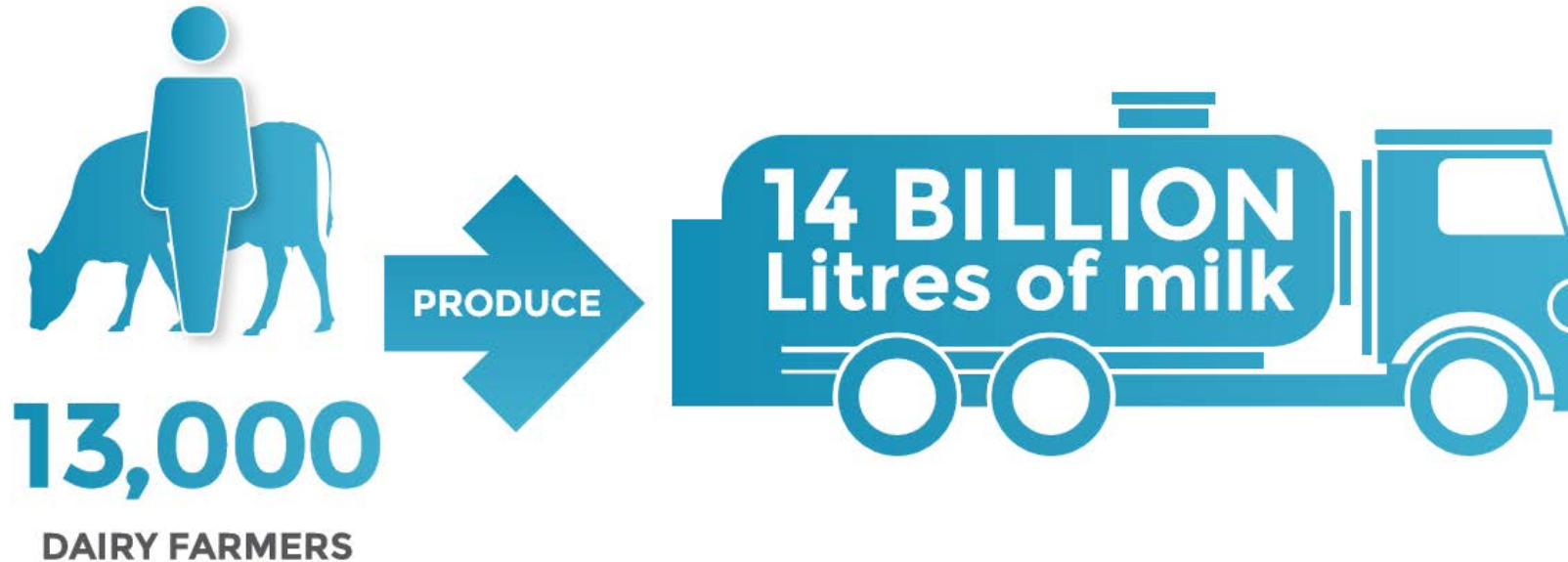


50,000

Employed on farms

Dairy | Dairy Farmers and Processing

ANNUAL MILK PRODUCTION



Dairy | Importance of Dairying

RURAL IMPACT OF DAIRY

Dairy is the bedrock of local communities.



Dairy | National and Global Context

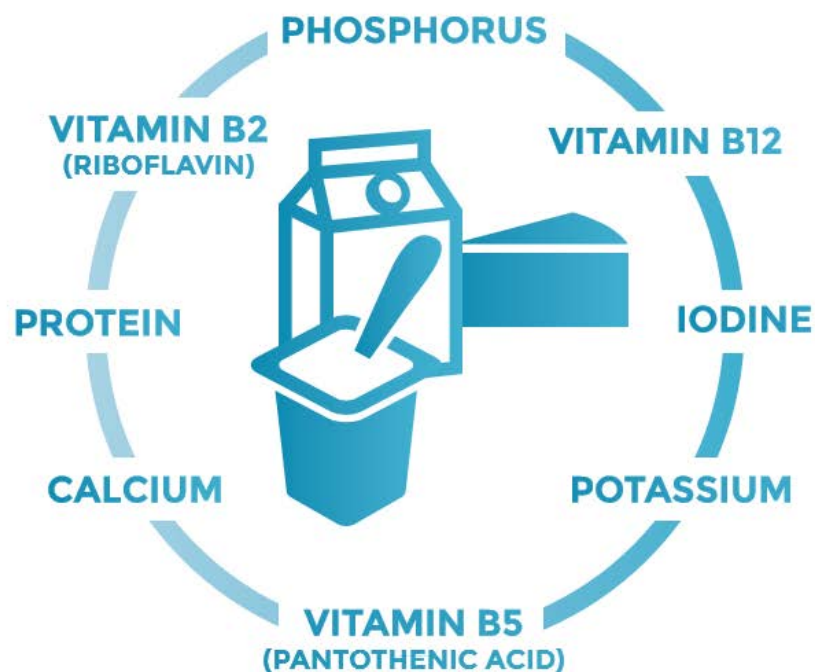
DAIRY, A MAJOR CONTRIBUTOR

to UK and global food security.

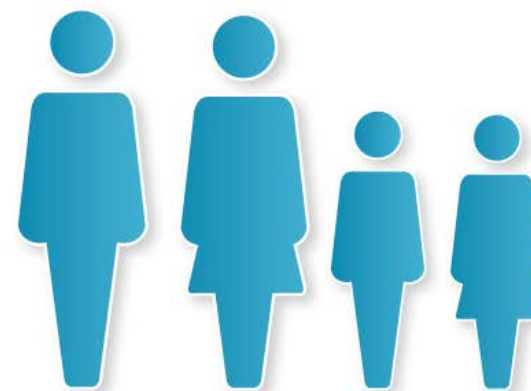


Dairy | People and Planet

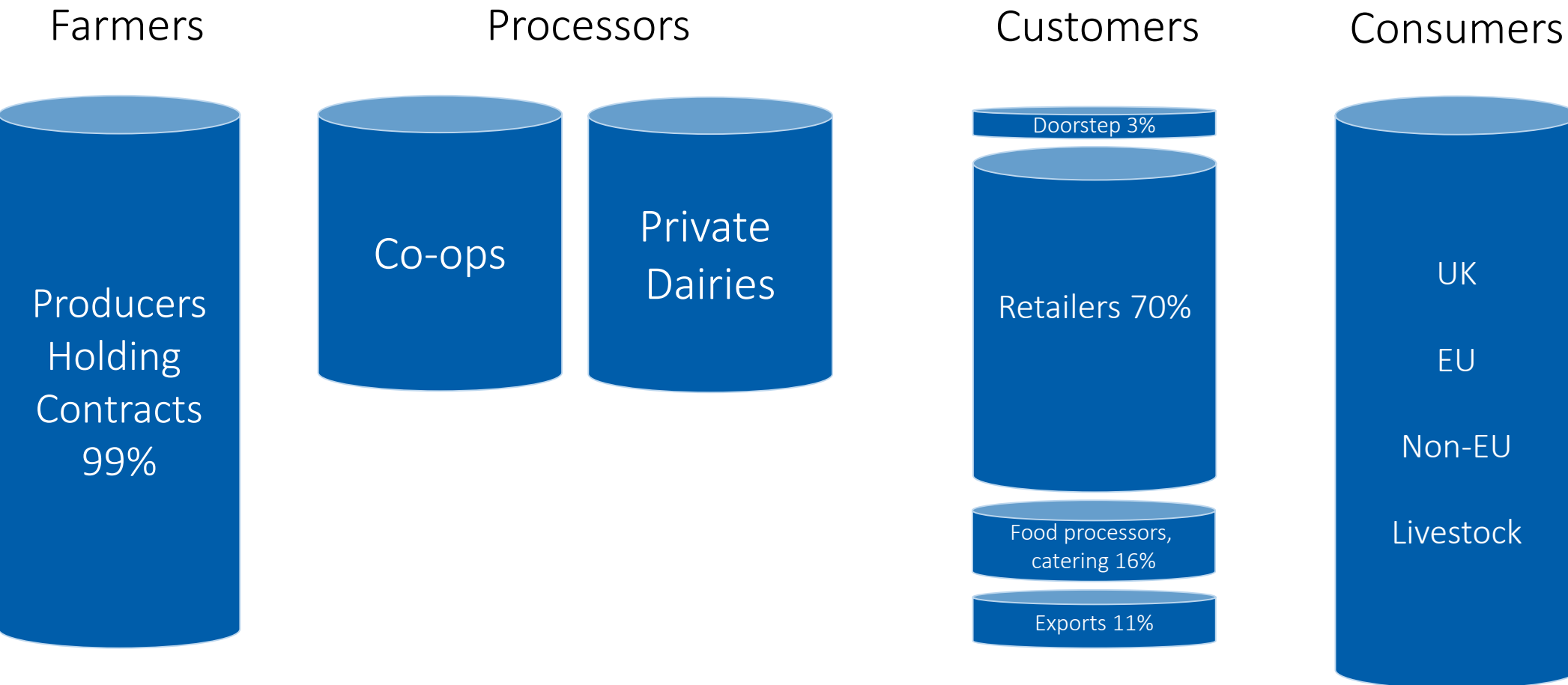
DAIRY AND A SUSTAINABLE DIET



The dairy food group plays an important role in providing **key nutrients** to the diets of children and adults.



UK Dairy Supply Chain



Major Milk Purchasers in the UK

• Arla Foods	International co-op
• Müller Group	Private dairy
• Dairy Crest	Publicly listed company
• First Milk	UK co-op
• United Dairy Farmers	UK co-op
• Lactalis McLelland	Private dairy
• Glanbia Cheese	Private dairy

Dairy UK Board | July 2017

Name	Company	Title
David Dobbin	Independent	Chair
Paul Vernon	Glanbia Cheese	Vice Chair
Tomas Pietrangeli	Arla Foods Europe	Vice Chair
Andrew McInnes	Müller Milk and Ingredients	Treasurer
Mark Taylor	Lactalis McLelland	
Nick Whelan	United Dairy Farmers	
Shelagh Hancock	First Milk	
Neil Kennedy	Crediton	
Tom Atherton	Dairy Crest	
Michael Hanley	Lakeland/Pritchitts	
Robert Graham	Graham's The Family Dairy	
James Neville	Volac International	
Nigel Byham	Bottled Milk Buyer Representative	
Jane Haywood	Chair: Dairy UK Scotland	
Lyndon Edwards	Dairy UK Farmers' Forum	
Arthur Fearnall	Dairy UK Farmers' Forum	

Contractual Arrangements

- 💧 Contracts between producers and purchasers almost universal
- 💧 In the UK, contracts are not regulated under the Dairy Package
- 💧 Industry developed Voluntary Code of Practice (vCoP) as an alternative
- 💧 Notice terms for producers vary between 3 to 12 months
- 💧 vCoP never designed to address price volatility
- 💧 Non aligned and aligned contracts

Retailer Aligned Contracts

Retailer	Pricing System
Marks & Spencer	Formula taking account of costs and market returns
Waitrose	Negotiation taking account of capital investment requirements
Asda	Premium over processor standard price
Sainsbury's	Quarterly review of key farm input costs
Co-op	Premium over processor standard price
Tesco	Formula taking account of costs and market return
Morrisons	Premium over processor standard price

BREXIT

Brexit | Our Asks From the Beginning

From the outset Dairy UK has asked for:

- 💧 Tariff free access to the EU market;
- 💧 To avoid the creation of non-tariff barriers;
- 💧 Ensure we have access to productive labour;
- 💧 To sort out the myriad of land border issues.

Brexit | Other Sectors?

CBI

MAKING A SUCCESS OF BREXIT

A WHOLE-ECONOMY VIEW OF THE UK-EU NEGOTIATIONS

DECEMBER 2016



Making a Success of Brexit aims to set out the priorities of sectors and by doing that, give clarity on the issues that apply across sectors, helping the government to maintain the key principles of openness, stability and certainty of trade, immigration, regulation and funding that are shared by all.

Brexit | Government



HM Government

The United Kingdom's exit
from and new partnership
with the European Union

PM's 12 principles which will guide the Government in fulfilling the democratic will of the people of the UK.

1. Providing certainty and clarity;
2. Taking control of our own laws;
3. Strengthening the Union;
4. Protecting our strong historic ties with Ireland and maintaining the Common Travel Area;
5. Controlling immigration;
6. Securing rights for EU nationals in the UK and UK nationals in the EU;
7. Protecting workers rights;
8. Ensuring free trade with European markets;
9. Securing new trade agreements with other countries;
10. Ensuring the UK remains the best place for science and innovation;
11. Cooperating in the fight against crime and terrorism;
12. Delivering a smooth, orderly exit from the EU

Brexit Key UK Government Position

- ◆ Take back control of immigration (no free movement of people);
- ◆ Exit the Single Market & Customs Union and do our own trade deals including with EU;
- ◆ Take control of our own law, end EU Court Jurisdiction over UK;
- ◆ No deal is than a bad deal;
- ◆ Maintain a common travel area with frictionless border with Ireland.

Brexit Key EU Positon

- 💧 No discussions on trade until after the Brexit bill is agreed;
- 💧 The EU will negotiate as a block;
- 💧 Four freedoms underpin single market and are indivisible (no cherry picking) – free movement of goods, services, capital and people;
- 💧 European law rights for EU nationals living in Britain;
- 💧 EU Supports Good Friday Agreement, how to avoid a hard border between UK & Ireland if UK left Customs Union;
- 💧 Deal can not affect Gibraltar without agreement of Spain.

Brexit | Specialist Departments



Department
for Exiting the
European Union



Department for
International Trade



Post Election

- ◆ Government language has softened to an extent;
- ◆ Business hopes for:
 - ◆ A softer Brexit with a no deal approach off the table;
 - ◆ Transition periods
 - ◆ Deal which safeguards trade, jobs and wider economy;
- ◆ EU believes it's aligned;

Brexit | The General Election – Agriculture

Full funding to 2022 is main Tory promise

A re-elected Conservative government will provide the orderly transition farmers need as the UK introduces new policies for agriculture after Brexit, Defra minister George Eustice tells

Johann Tasker

What does a good Brexit deal look like for farming?

A good Brexit deal would give us the comprehensive free-trade agreement we want – so we still have access to the European market. And it would probably give us an understanding about how we deal with issues such as pests and diseases – often a common challenge across Europe.

We would want to have some sort of concordat that would

address those two key issues. But when it comes to domestic policy, obviously that is an issue in future for the UK government – it is not an issue relevant to the Brexit negotiation itself.

Your manifesto guarantees the current level of farm support for an additional two years until 2022 – why is that?

It is incredibly important we make any changes gradually and

there is an orderly transition from the old CAP to the new policy. I've always been clear that we should have a funded agricultural policy – but that in the long term we could spend that money far better.

For me, protecting the budget for five years – for the lifetime of the next parliament – is crucial because it enables us to reassure farmers that we intend to have a funded agricultural policy.

Can we really expect a "strong and stable" agricultural sector under the Tories? Coming out of the CAP is going to mean massive upheaval, isn't it?

I don't think it does. We've made clear that in the first instance the Great Repeal Bill is going to bring across all EU legislation, including many of the elements of the CAP.

We can then gradually change things – switch off the bits we

pledged that a Conservative government would maintain support payments at their current level for an additional two years, until 2022. Previously, payments were guaranteed only until 2020.

Post-Brexit farm policy 'could take until 2025'

- * Tories pledge to retain payments until 2022
- * Gradual change to post-Brexit farm policy
- * Implementing new system may take to 2025

By Johann Tasker

Farmers face waiting the best part of a decade before a post-Brexit support system to replace the Common Agricultural Policy is introduced, it has emerged.

According to Defra minister George Eustice, any change to a system would be gradual and not be completed until 2025 at the earliest.

Mr Eustice made the comments in a speech to the Conservative Party conference in Manchester on Wednesday.

Any change to a new system would involve a transition, said Mr Eustice. He added: "For me, protecting the budget for five years – for the lifetime of this [next] parliament – is crucial because it enables us to give farmers the reassurance that we intend to have a funded agricultural policy."

Asked how long the transition would take, Mr Eustice said: "It is highly unlikely we would complete it within the lifetime of the next parliament. As our manifesto makes clear, we envisage some sort of totally new agri-environment scheme for the following parliament, after 2022."

"But the reality is that very little, if anything, would change until we actually leave the EU in 2019. And

George Eustice is keen to avoid a cliff edge over Brexit

I would then envisage, perhaps between 2020 and 2025, a gradual change in the way we support agriculture, so we emerge with something that is much more focused."

Direct payments currently make up an estimated 55% of farmers' incomes. Producers reliant on the payments are likely to welcome a longer transition period. But many

farmers voted for Brexit because they consider the current system cumbersome and overly bureaucratic.

In a recent study by the National Farm Research Unit, 32% of farmers said their business would be vulnerable to a reduction in direct payments after 2020. NFU president Meurig Raymond said:



Brexit | The General Election – Agriculture

Food will not get cheaper after we leave, says Gove

Britain will not get cheaper food by tearing down old trade barriers, the environment secretary said yesterday, as he appeared to contradict a claim he made during the Brexit campaign (Jerome Starkey writes).

Michael Gove said he had no intention of undermining protections that shield UK farmers from cheap, lower-quality food imports, despite saying last June that leaving the EU would extend “new opportunities to developing nations and in the process [allow] prices in Britain to become cheaper”.

At the Royal Three Counties



Michael Gove said he intended to keep protecting farmers from imports
FACUNDO ARRIZABALAGA/EPA

agricultural show in Malvern, he said: “I have absolutely no intention of allowing any of the protections which are currently in place, which ensure that the consumer has high-quality

food and that farmers are encouraged to invest in maintaining very high standards, there’s no way that’s going to be undermined.” He said the government wanted “free and frictionless trade”, but refused to rule out staying inside the customs union.

“What’s important is not the union of which we are a part, it’s the powers and freedoms and opportunities that we have,” he said. “The most important thing is to have the freest possible trade and to maintain access to European markets, but at this stage I don’t want to be prescriptive about how we do that.”

Brexit | The Negotiations Begin

Terms of Reference for the Article 50 TEU negotiations

The United Kingdom and the European Commission, representing the EU, share the understanding that the following elements will guide the negotiations under Article 50 of the Treaty of the European Union (TEU):

Negotiation Structure

1. The negotiating rounds will consist of plenary sessions and negotiating group meetings.
2. Plenary negotiating sessions should be co-chaired by the Principals and/or Coordinators who have the overall responsibility for managing the negotiating process and provide necessary guidance, as appropriate.
3. The following initial negotiating groups have been established:
 - Citizens' rights;
 - Financial Settlement;
 - Other Separation issues.

In addition, a dialogue on Ireland / Northern Ireland has been launched under the authority of the Coordinators.

4. The Principals may decide to establish additional working groups, sub-groups or organise breakout sessions.
5. Each round of negotiations should comprise public officials of both sides only.

Negotiating texts and other negotiating documents

6. Negotiation texts that are intended for discussion at any negotiating round should be shared at least one week in advance wherever possible.

Frequency of Negotiating Rounds

7. Negotiation rounds will be organised once every 4 weeks in principle unless otherwise decided by mutual consent. Negotiators may meet intersessionally to prepare negotiations, as required.

8. Indicative dates for first sessions have been agreed as per paragraph 9 below. Each round will include discussion of each of the issues set out in Paragraph 3.
9. Indicative dates are:
 - Opening: 19th June
 - Second round: w/c 17th July
 - Third round: w/c 28th August
 - Fourth round: w/c 18th September
 - Fifth round: w/c 9th October

Language

- English and French will be used, as working languages, during negotiations and in working documents. Interpretation will be provided by the European Commission.

Transparency

- For both parties the default is transparency.
- It is for the Party providing the information to state what, if any, restrictions should apply to their further distribution.
- Any disclosure by either the United Kingdom or the European Commission of documents originating from the other Party will be subject to prior consultation of the originating party.
- Both Parties will handle negotiating documents in accordance with their respective legislation.

Public messaging

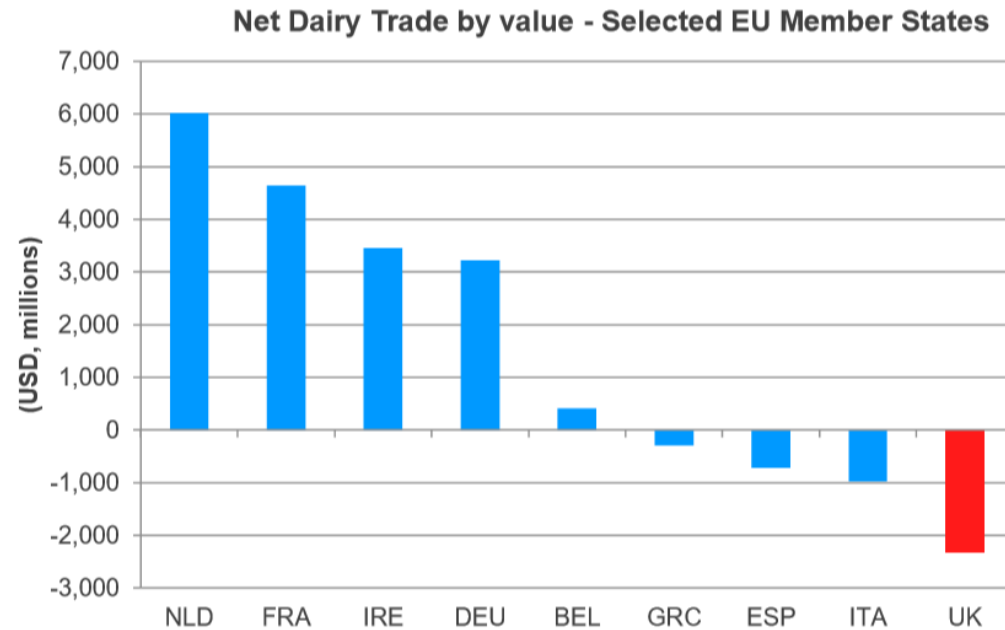
- Where possible, both Parties will seek to agree public statements relating to negotiating rounds.

Brexit | Realities

The UK has the 2nd largest dairy deficit in the world.

But, the UK is also a major exporter and post Brexit will be the 5th largest exporter in the world after the EU (remaining member states), USA, NZ and Australia.

A bad deal for the UK would be a major problem for the domestic dairy industry.

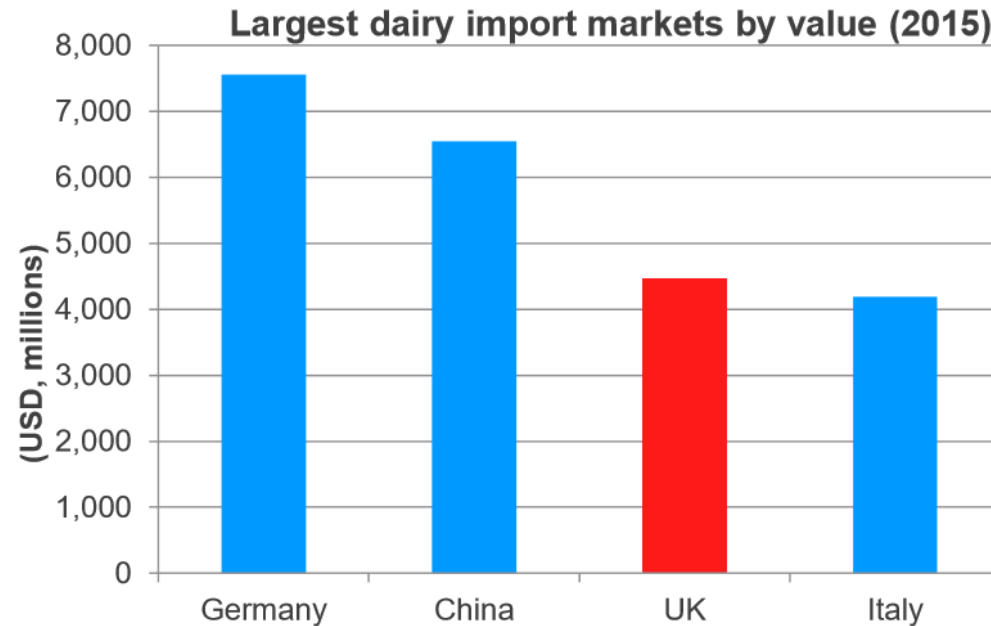


Brexit | Realities

The UK is a significant importer of dairy products by value.

98% of UK dairy imports are of EU origin with one third of those from Ireland.

A bad deal for the UK would be also be a bad deal for the European dairy industry.



Brexit | Can We Make Brexit Work?

YES, WE CAN... WE HAVE TO!

Brexit | Our Asks Post Election

- ◆ Dairy UK is given due prominence and priority in Brexit discussions;
- ◆ Continued tariff free access to the EU;
- ◆ Any new UK farm support policy must improve the competitiveness of British dairy farming and provides equitable treatment in the provision of public support compared to the dairy farmers in the EU;
- ◆ Ensure we have access to productive labour;
- ◆ That the UK avoid regional distortions in any deal;
- ◆ That Government avoid a cliff edge deal and go for lengthy transition to allow deal to be finalised and seamlessly phased in.

IDF FACTS AND FIGURES

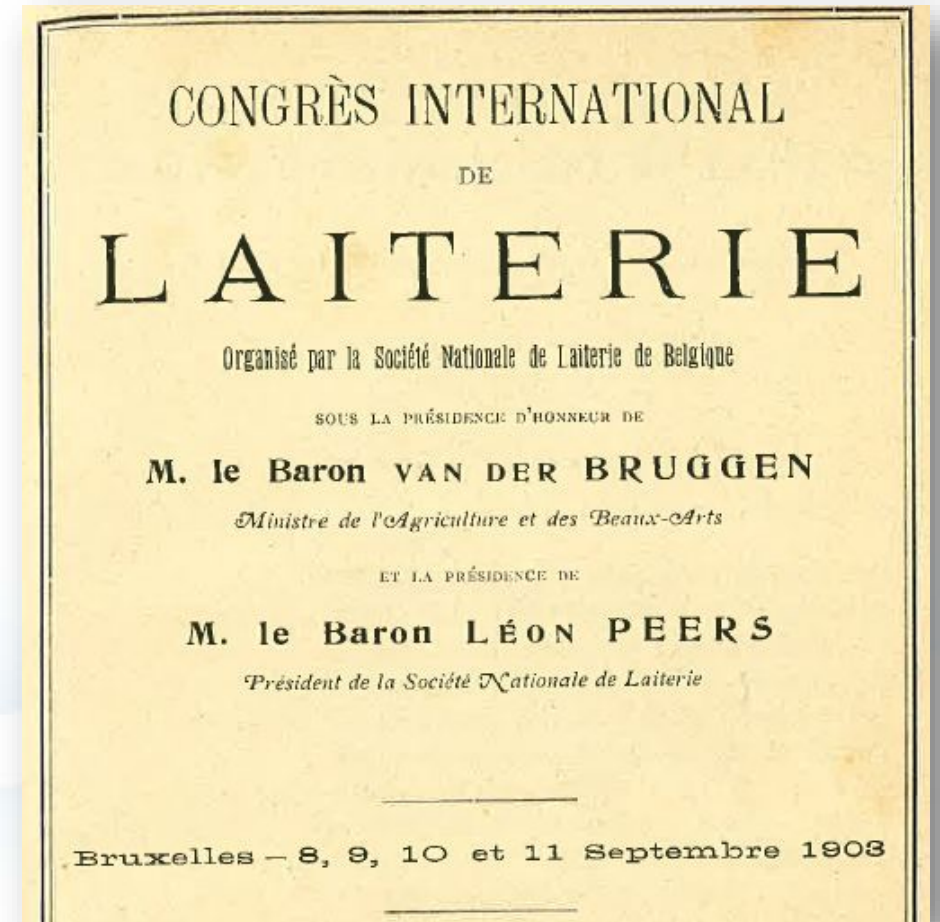
Founded in 1903

45 member countries

75% of world milk production

85% of milk powder exports

Hundreds of experts working
in 17 Standing Committees



VISION

**Helping to nourish the world
with safe and sustainable dairy**



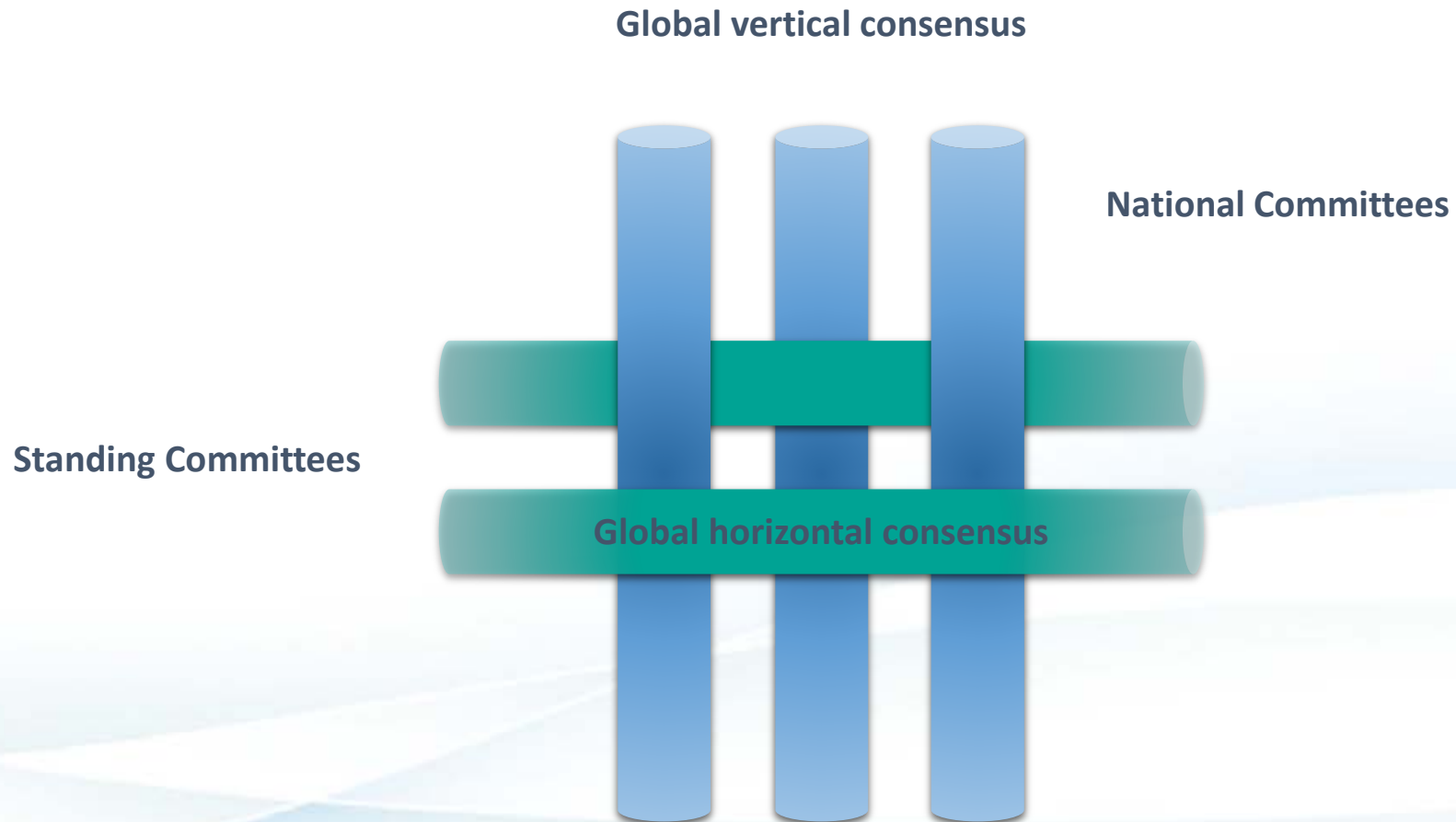
ROLE



Provide science-based expertise and **consensus** for the global sector and **be the global voice of dairy** to intergovernmental organisations

GLOBAL CONSENSUS

Wide sector coverage and broad representation



What's on Our Desks?

- Establishing the benefits of dairy in the nutrition and sustainability debate;
- IDF Guide to good animal welfare practices;
- Establishing a communication for the dairy sector on antimicrobial resistance;
- Continuing to work within Codex and with intergovernmental organisation to provide the expertise that ensures the role of the livestock sector is understood and to create a positive working environment for dairy;
- Work on standards.

WORKING AREAS



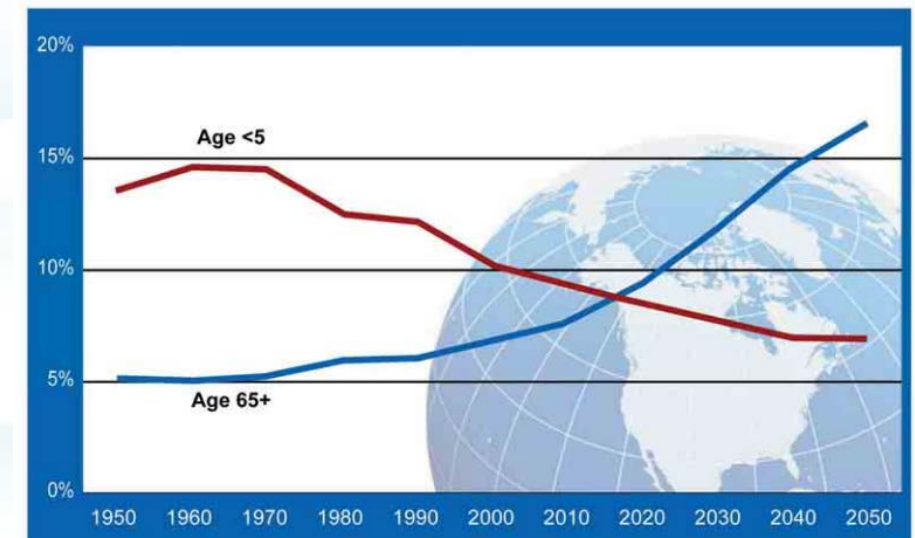
Dairy: The Challenge and Opportunity



2050 > 9 billion

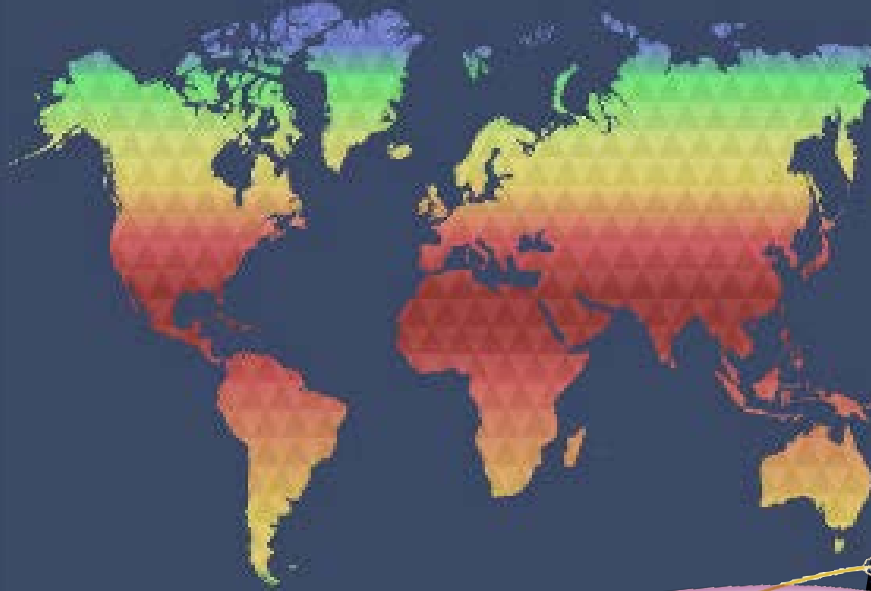
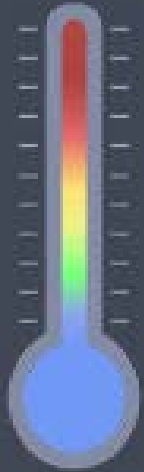


Young Children and Older People as a Percentage of Global Population: 1950-2050

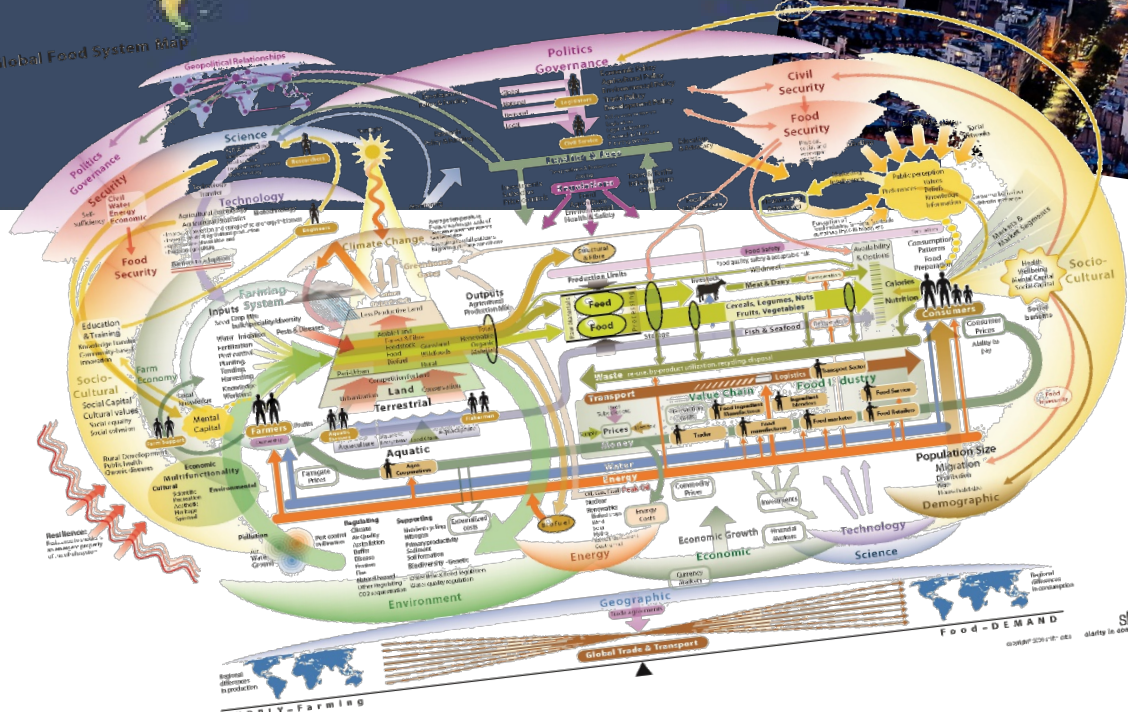


Sustainable Development Goals





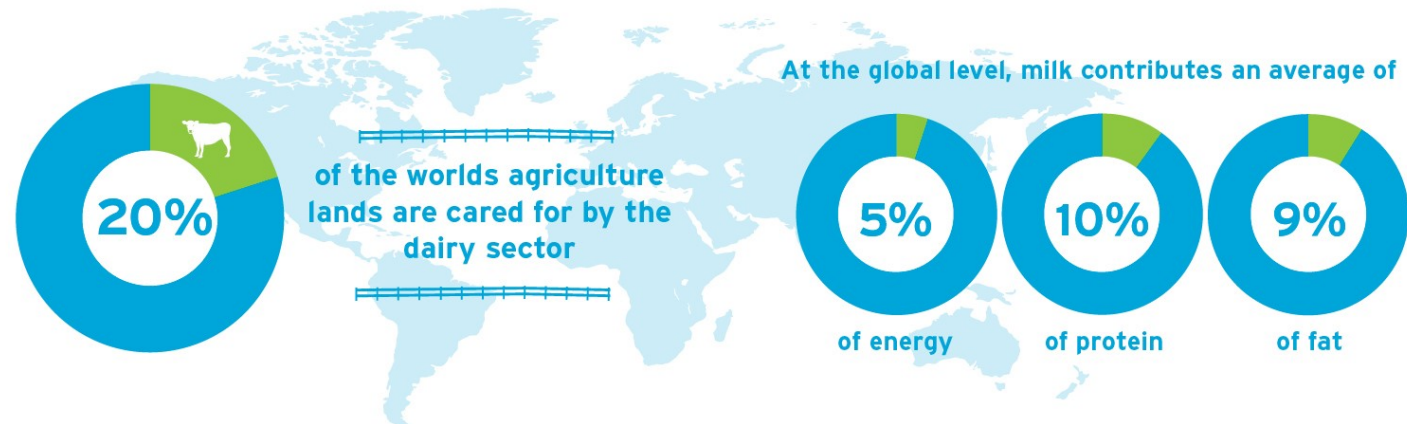
Global Food System Map



OUR GLOBAL STORY



OUR GLOBAL STORY

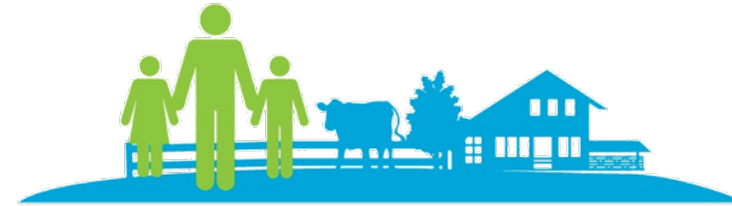


OUR GLOBAL STORY

133 million
Dairy Farms



600 million
people live on Dairy Farms



400 million
additional people are supported by the
full time jobs that are created in
support of dairy farming



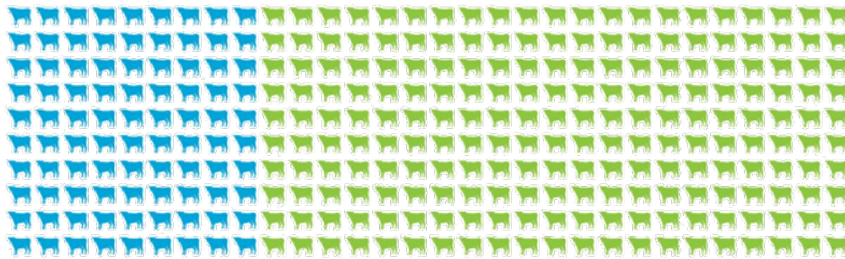
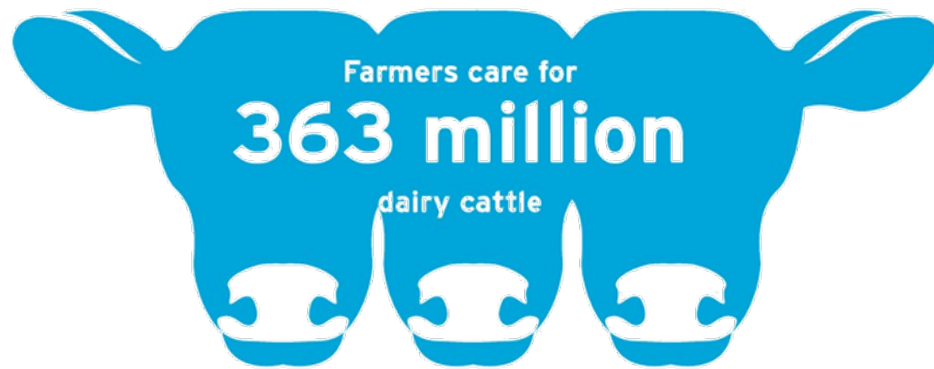
240 million
people are directly or
indirectly employed in the
dairy sector



37 million
farms are female-headed with
80 million
women engaged in dairy
farming to some extent



OUR GLOBAL STORY



In industrialized economies herds are often larger: the average dairy farms in the UK and the US manage **90 and 300 dairy cows** respectively



Farmers in developing countries usually keeping them in herds of

2 or 3 cows



However, farms with more than 100 cows represent less than

0.3%

of all dairy farms globally



OUR GLOBAL STORY

Milk is one of most
produced and valuable
agricultural commodities
worldwide

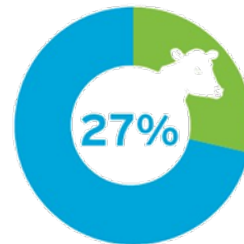
Milk ranks third by production tonnage



Milk is the top agricultural
commodity in value terms the
world over



Contributes



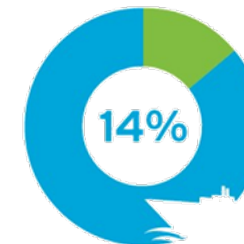
to the global value
added from livestock

Contributes



to the global value added of
agriculture

Milk and dairy products
account for about



of global agricultural
trade



OUR GLOBAL STORY



The Global Dairy Sector: Facts

Sustainable production, processing and consumption of milk and dairy products benefit people and the planet, and can help to achieve the Sustainable Development Goals.

- **Milk is one of most produced and valuable agricultural commodities worldwide.** In 2013, with a total production of 770 billion litres valued at USD 328 billion, milk ranked third by production tonnage and was the top agricultural commodity in value terms the world over.¹ Milk contributes 27% to the global value added of livestock and 10% to that of agriculture.
- **Milk is a local commodity.** It is produced and consumed in basically all world's countries and, in most of them, it ranks among the top five agricultural commodities in both quantity and value term.² Whole fresh cow milk represents 82.7% of global milk production, followed by milk from buffaloes (13.3%), goats (2.3%), sheep (1.3%) and camels (0.4%).
- **Milk is a global commodity.** Milk and dairy products account for about 14% of global agricultural trade. In particular, whole milk powder (WMP) and skimmed milk powder (SMP) are the most traded agricultural commodities globally as percentage of production traded, while fresh dairy products, with less than 1% of production traded, are the least traded agricultural commodity.³
- **The dairy sector is growing fast.** World milk production is projected to increase by 177 million tonnes by 2025, at an average growth rate of 1.8% per annum in the next 10 years. Over the same period, per capita consumption of dairy products is projected to increase by 0.8% and 1.7% per year in developing countries, and between 0.5% and 1.1% in developed economies.⁴ Because of the sheer size of the dairy industry, these growth rates can produce big development payoffs for people's livelihoods, for the environment and for public health.
- **The dairy sector is heterogeneous.** World milk production largely derives from cattle, buffaloes, goats, sheep and camels. Milk animals are raised in a multitude of production systems, which can be stylized in four. Specialized landless systems, whose main objective is the production of milk. Market-oriented and subsistence-oriented integrated dairy-crop systems, that target the joint production of several outputs, including milk, meat and crops. Pastoral systems that rely on mobility to produce milk and, to a lesser extent, other livestock products and services.
- **Dairy animals are a popular asset in rural areas.** Over one out of four of the 570 million farm holdings worldwide, that is over 150 million farmers, keep at least one milk animal, including cows, buffaloes, goats and sheep. In particular, there are about 133 million holdings keeping dairy cattle, 28.5 million keeping buffaloes, 41 and 19 million keeping goats and sheep respectively. Farmers often keep mixed herds with more than one species of dairy animal.⁵ Cows are by far the most common dairy animal, with one farmer in developing countries usually keeping them in herds of 2 or 3 heads. In industrialised economies, however, herds are often larger: the average dairy farms in the UK and the US manage 90 and 300 dairy cows respectively.⁶ However, farms with more than 100 cows represent less than 0.3% of all dairy farms globally.⁷

It supports livelihoods. Dairy animals are a regular source of food and cash who either consume or sell milk and dairy products every day, which is not only a source of income but also a store of wealth and enhance resilience: sell them in time of need to generate cash; use animals as collateral for loans; support them even for long distances, thereby maintaining an important asset to leave their homestead. Dairy animals generate dung, which is used as fertilizer, fuel and construction material, and can be also marketed. They also contribute to productivity through animal traction and provide social status and thereby facilitating networking, which is at the core of effective market relations and alliances.

It is key to nutrition and health. Milk and dairy products are nutrient-rich, providing energy and significant amounts of protein and micronutrients (magnesium, selenium, riboflavin, vitamins B5 and B12, which are particularly important for children). Most countries with dietary guidelines recommend a balanced diet. At global level, milk contributes on average 134 kcal and 8.3 g of protein/capita per day and 7.6 g of fat/capita, or 10% of the global supply of energy, protein and fat for human consumption. It is the third large provider of protein and fat for human consumption, after cereals and pulses. Milk and dairy products cost less per unit of energy and the third large provider of protein and fat for human consumption, after cereals and pulses. Milk and dairy products cost less per unit of energy and the third large provider of protein and fat for human consumption, after cereals and pulses. Milk and dairy products cost less per unit of energy and the third large provider of protein and fat for human consumption, after cereals and pulses.

It is women empowerment. Livestock are possibly the most widely kept animals in developing countries as animals are more easily managed than land and other physical assets. In many countries, women own or manage more than 50% of the dairy animals. They are directly owned by women in 25% of cattle keeping systems, and over 37 million of dairy farms are female-headed. Women own or manage more than 50% of the dairy animals. They are directly owned by women in 25% of cattle keeping systems, and over 37 million of dairy farms are female-headed. Women own or manage more than 50% of the dairy animals. They are directly owned by women in 25% of cattle keeping systems, and over 37 million of dairy farms are female-headed.

It is a source of income and employment. Dairy production is often organized in cooperatives or smallholder systems. In many countries, dairy production is a source of income and employment for women. In many countries, dairy production is a source of income and employment for women. In many countries, dairy production is a source of income and employment for women.

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The Global Dairy Sector: Facts
Food and Agriculture Organisation of the United
Nations- 2016



OUR GLOBAL STORY

SUSTAINABLE PRODUCTION, PROCESSING AND CONSUMPTION OF
MILK AND DAIRY PRODUCTS BENEFITS PEOPLE AND THE PLANET
AND HELPS TO ACHIEVE THE SUSTAINABLE DEVELOPMENT GOALS

The Global Dairy Sector: Facts
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DAIRY IS KEY TO HELPING DELIVER THE UN'S SUSTAINABLE
DEVELOPMENT GOALS

Assistant Director General of the FAO
Dr Ren Wang
GASL Event for World Milk Day 2017



Dairy Declaration



Food and Agriculture
Organization of the
United Nations



THE DAIRY DECLARATION OF ROTTERDAM

The dairy community accepts sustainability challenge

We, representatives of the one billion person global dairy community, gathered in Rotterdam at the World Dairy Summit, are committed to the sustainable development of the dairy sector to generate widespread benefits for people and the planet.

We recognize:

- the UN 2030 Agenda for Sustainable Development as the overarching framework that guides our actions towards sustainable development from a social, environmental, economic and health perspective;
- the vital role of dairy for food security and poverty reduction and the important livelihood and development opportunities for family farmers, small holders and pastoralists;
- the critical contribution the dairy sector makes to Sustainable Development, including:
 - the essential role of dairy products for balanced, nutritious and healthy diets;
 - the major contribution that dairy makes to countries' economies, income, employment and livelihood
 - the key function of the dairy sector in the management of terrestrial ecosystems and the need to address environmental degradation and climate change, and to support biodiversity;
- the diversity of dairy production systems and dairy breeds, contexts and priorities;
- the need for continuous and open dialogue and joint actions at all levels.

We agree to:

- Take an integrated approach to promote the sustainability of dairy systems, jointly taking into consideration social, economic, health and environmental dimensions;
- Give particular attention to the needs of family farmers, small holders and pastoralists;
- Build, implement and disseminate tools and guidelines to facilitate the identification and adoption of sustainable practices in the dairy sector;
- Build capacity in support of sustainable practices and provide enabling conditions;
- Measure and report on sustainability outcomes.
- Strengthen multi-stakeholder dialogue for consensus building, reviewing progress and continuous improvement.

Rotterdam, 19 October 2016



Jeremy Hill
President, International Dairy Federation



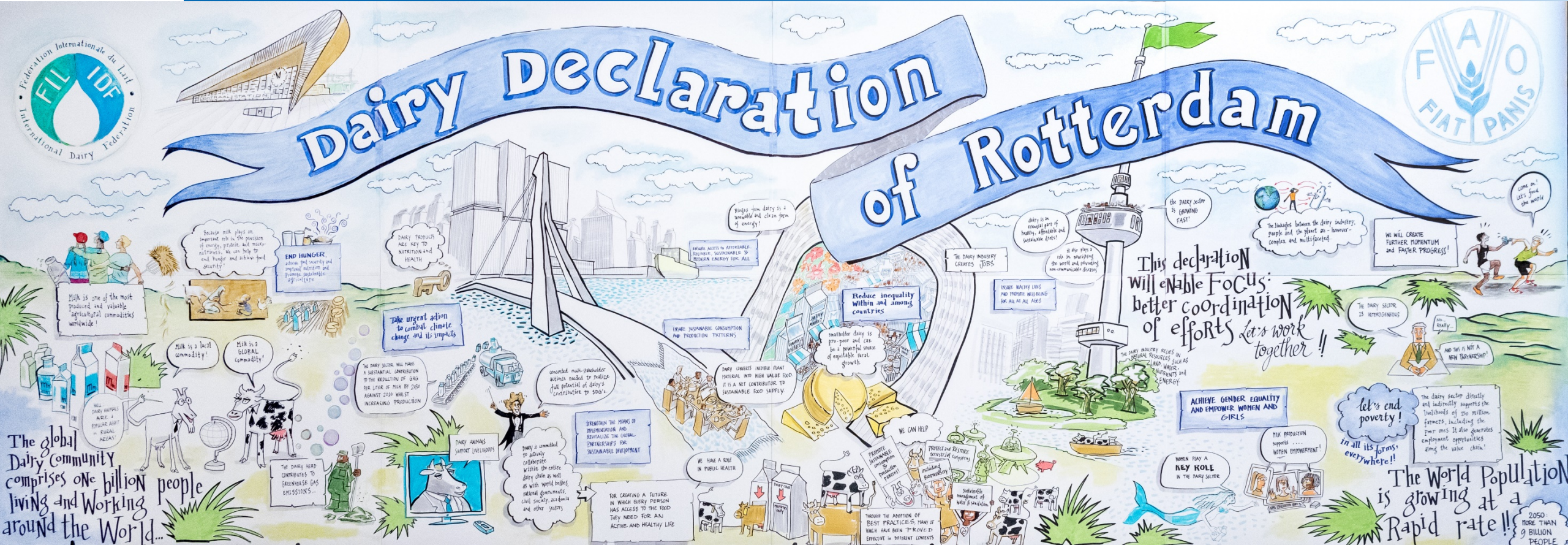
Ren Wang,
Assistant Director General, Food and Agriculture
Organisation of the United Nations

DAIRY DECLARATION

Dairy Declaration

We, representatives of the one billion person global dairy community, are committed to the sustainable development of the dairy sector to generate widespread benefits for people and the planet.





We recognise:

- The **critical contribution** the dairy sector makes to Sustainable Development
- The **essential role** of dairy products for balanced, nutritious and healthy diets;
- The **major contribution** of that dairy makes to countries' economies, income and employment, and livelihood support for smallholders and pastoralists
- The **key function** of the dairy sector in the management of terrestrial ecosystems and the need to address environmental degradation and climate change, and to support biodiversity/

MOVING FORWARD





DAIRY DECLARATION

The Support of IDF Members is Critical

Phase 1 - Raising Awareness

- Make people aware of the Declaration in your country;
- Ask the industry in your country to endorse the Declaration;
- IDF strongly encourages members to engage in initiatives which help meet the principles of the Declaration and please let us know about them. If we don't know we can't report on progress!

Go to www.dairydeclaration.org to endorse the Dairy Declaration, subscribe to updates and for more information



IN DEVELOPMENT



PLEASE JOIN US IN BELFAST FOR IDFWDS2017!

2017
making a difference
with dairy

IDF WORLD DAIRY SUMMIT 2017

Belfast

29 October to 3 November



THANK YOU