



# *Evolving Global Landscape & Implications for Dairy*

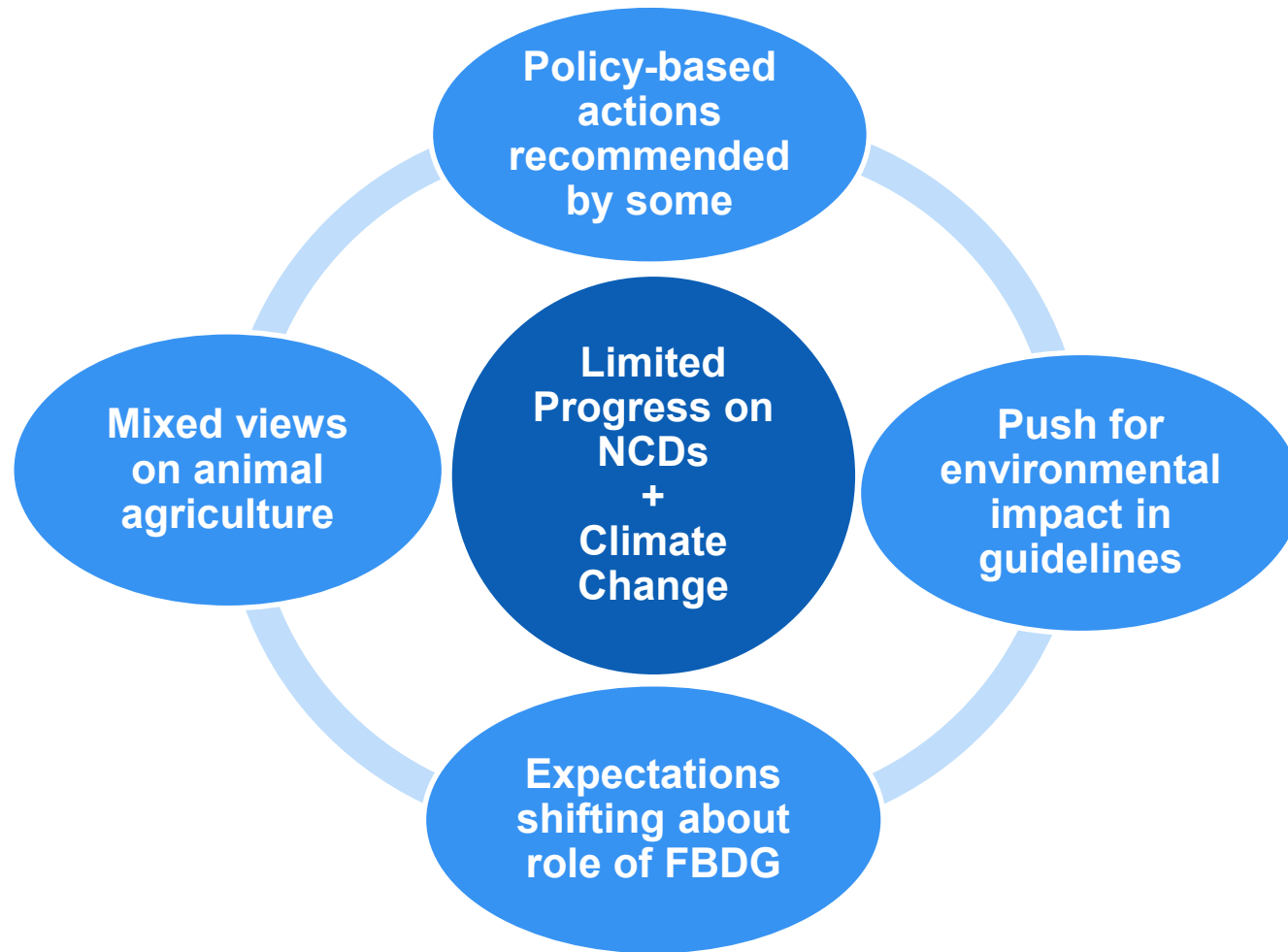
Jill Nicholls PhD

June 4, 2019

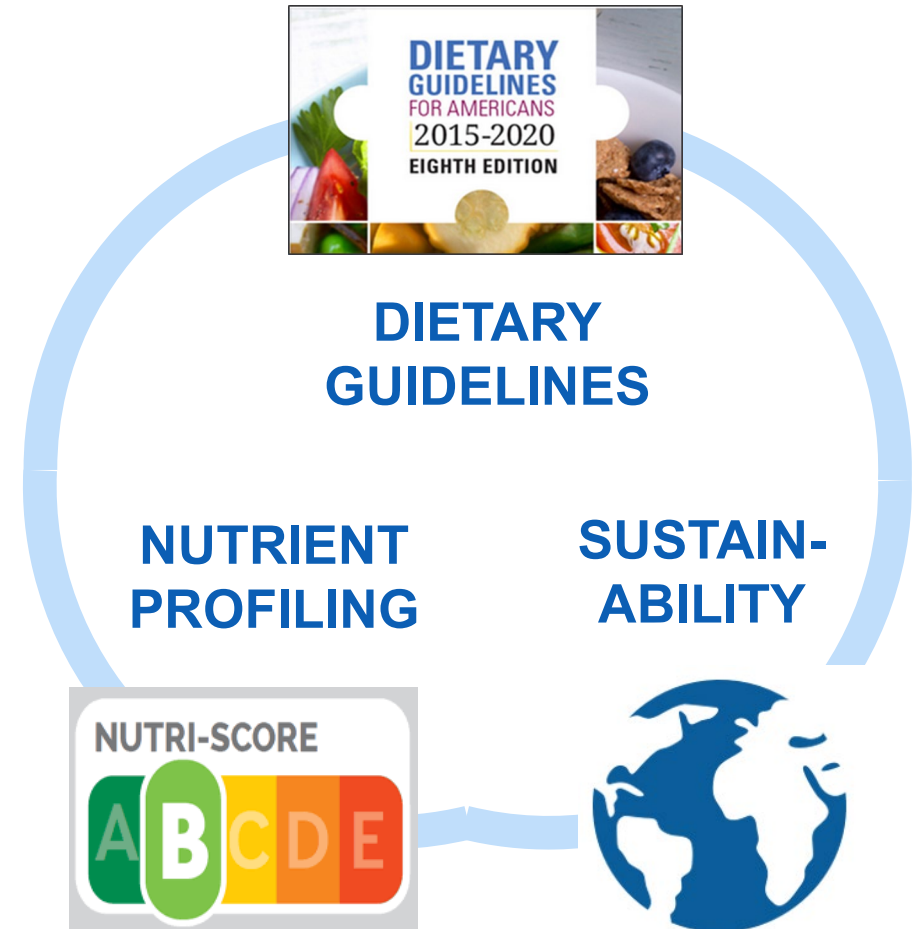
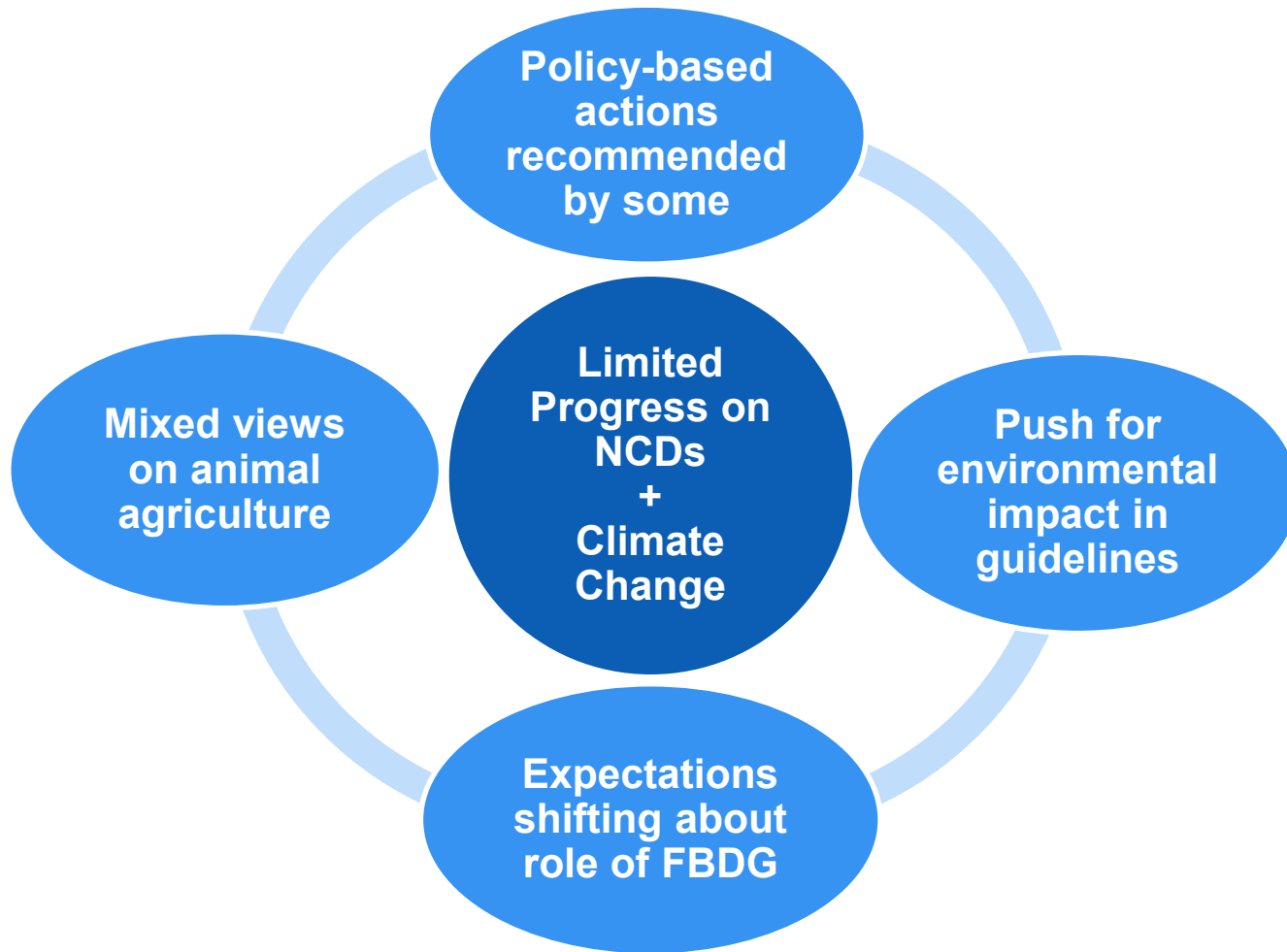
**INTERNAL AND CONFIDENTIAL  
NOT FOR DISTRIBUTION**

*Confidential Trade Secret and Commercial Information – Exempt from FOIA under 5 U.S.C. 552(b)(4)*

# Stakeholders' concerns on health, sustainability & food system converging



# Stakeholders' concerns on health, sustainability & food system converging



NationalDairyCouncil.org



@NtlDairyCouncil

**INTERNAL AND CONFIDENTIAL  
NOT FOR DISTRIBUTION**

*Confidential Trade Secret and Commercial Information – Exempt from FOIA under 5 U.S.C. 552(b)(4)*



# Developments in Food-Based Dietary Guidelines



NationalDairyCouncil.org



@NtlDairyCouncil

**INTERNAL AND CONFIDENTIAL  
NOT FOR DISTRIBUTION**

*Confidential Trade Secret and Commercial Information – Exempt from FOIA under 5 U.S.C. 552(b)(4)*



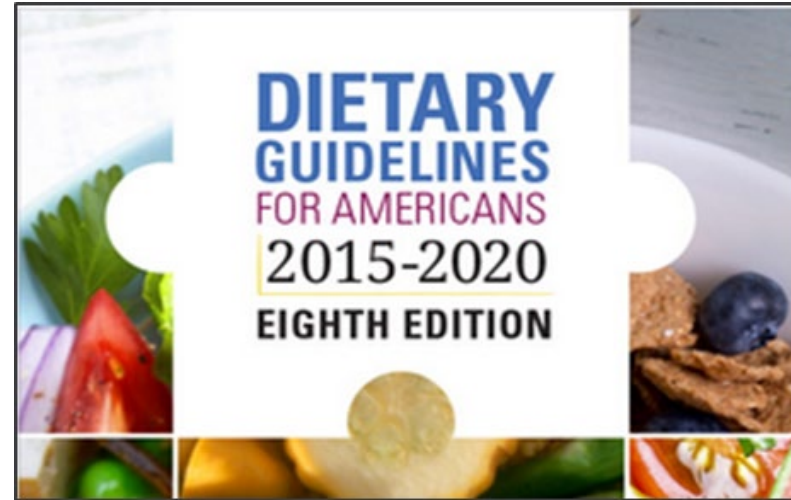
# The DGA impacts nutrition policy and the H&W marketplace





# The Dietary Guidelines for Americans has included 3 servings\* of dairy foods in healthy eating patterns since 2005

\*for those 9 years and older



The 2015 DGA states that healthy eating patterns, including low-fat or fat-free dairy foods, are associated with reduced risk for several chronic diseases, including cardiovascular disease (strong evidence) and type 2 diabetes (moderate evidence). Dairy intake is also linked to improved bone health, especially in children and adolescents.



NationalDairyCouncil.org



@NtlDairyCouncil

# The US DGA are developed using a science-based process:

- Base recommendations on the body of evidence (Dietary Guidelines Advisory Committee, NESR)
- Meet nutrient needs (Dietary Reference Intakes)
- Reduce risk for NCDs relevant to the U.S. (e.g., CVD, obesity)
- Put in context of current consumption patterns (NHANES)
- Include variety of nutrient-dense, culturally-appropriate foods (diets modelled with 5 basic food groups/sub-groups)





**Dairy foods make  
multiple nutrition  
and health  
contributions  
across the lifespan**

- Nutrient-dense
- Key source of under consumed nutrients
- Contain nutrients that are difficult to replace
- Consumption linked to health benefits
- Core part of healthy eating patterns
- Appealing, affordable, accessible, culturally-appropriate



NationalDairyCouncil.org



@NtlDairyCouncil

**INTERNAL AND CONFIDENTIAL  
NOT FOR DISTRIBUTION**

*Confidential Trade Secret and Commercial Information – Exempt from FOIA under 5 U.S.C. 552(b)(4)*





# Dairy recos in Food-Based Dietary Guidelines are evolving

## 2019 CANADA

- Canada's Food Guide combined dairy and meat (+alternatives) into single protein category, encouraged consumption of plant-based foods

## 2016 UK

- Recommend 2 servings in UK Eatwell Guide decreased from 3 in 2007.
- "Milk and dairy foods" group changed to "Dairy and alternatives"

## 2020 U.S.

- 2020 DGAC process underway
- Dairy Group recommendations have included 3 servings/day since 2005

## 2019 FRANCE

- Recommend 2 servings/day of dairy in 2019, down from 3 in 2011
- Serving sizes are smaller than in U.S.

## GLOBAL THEMES:

- Shift from guidance to meet nutrient needs...to guidance that links dietary patterns to reduced risk for NCDs
- Including public health policy and food systems perspectives
- Calls for sustainability concepts in FBDG
- Calls for countries without FBDG to develop/adopt them



NationalDairyCouncil.org



@NtlDairyCouncil

**INTERNAL AND CONFIDENTIAL  
NOT FOR DISTRIBUTION**

*Confidential Trade Secret and Commercial Information – Exempt from FOIA under 5 U.S.C. 552(b)(4)*



# Calls for Sustainability in FBDG



NationalDairyCouncil.org

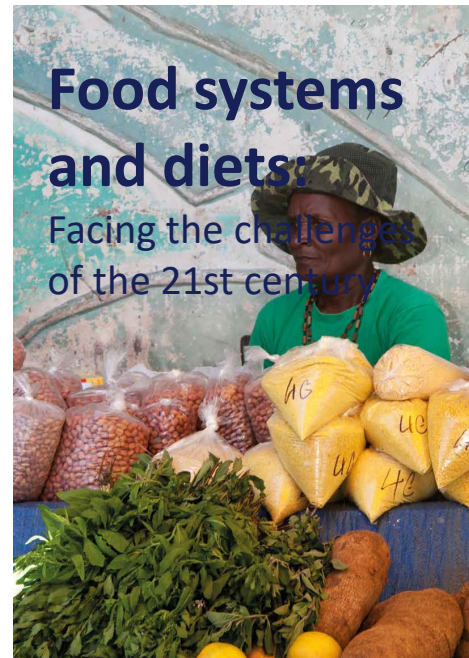
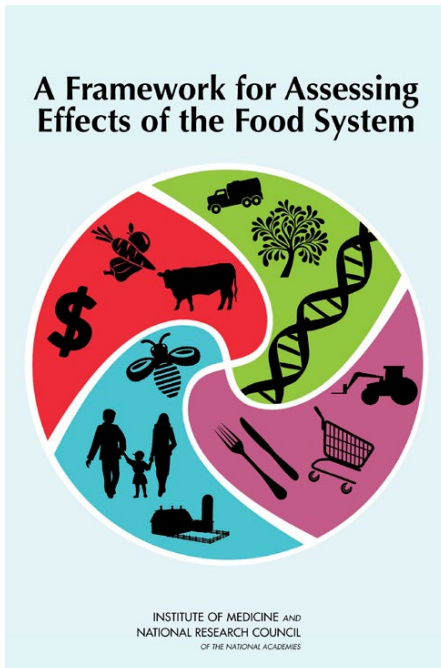


@NtlDairyCouncil



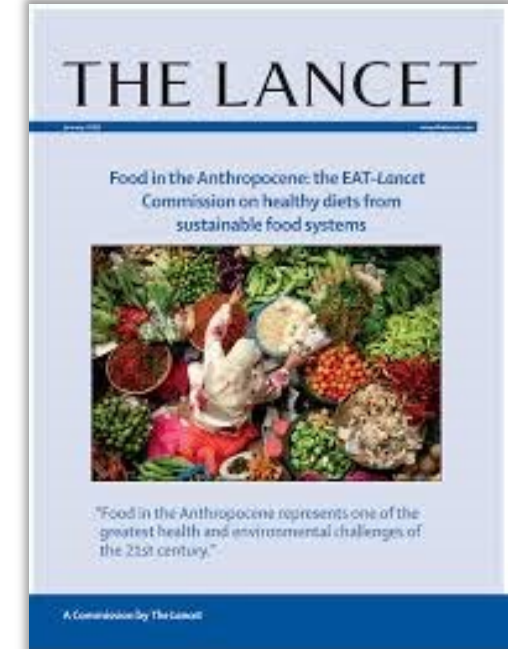
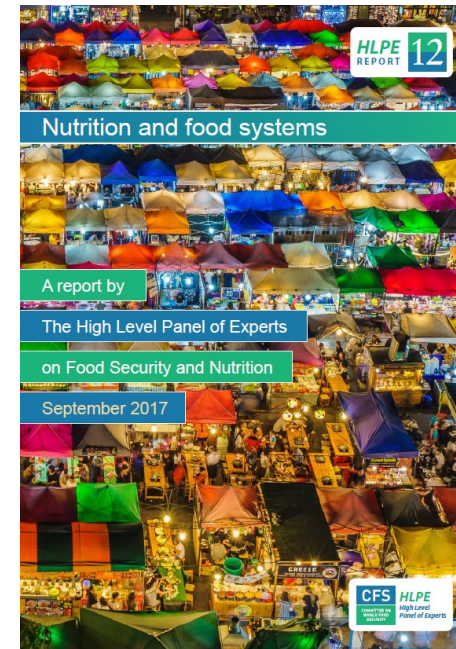
# A movement is growing to include sustainability concepts in FBDG

Global Panel 2016



FAO 2016

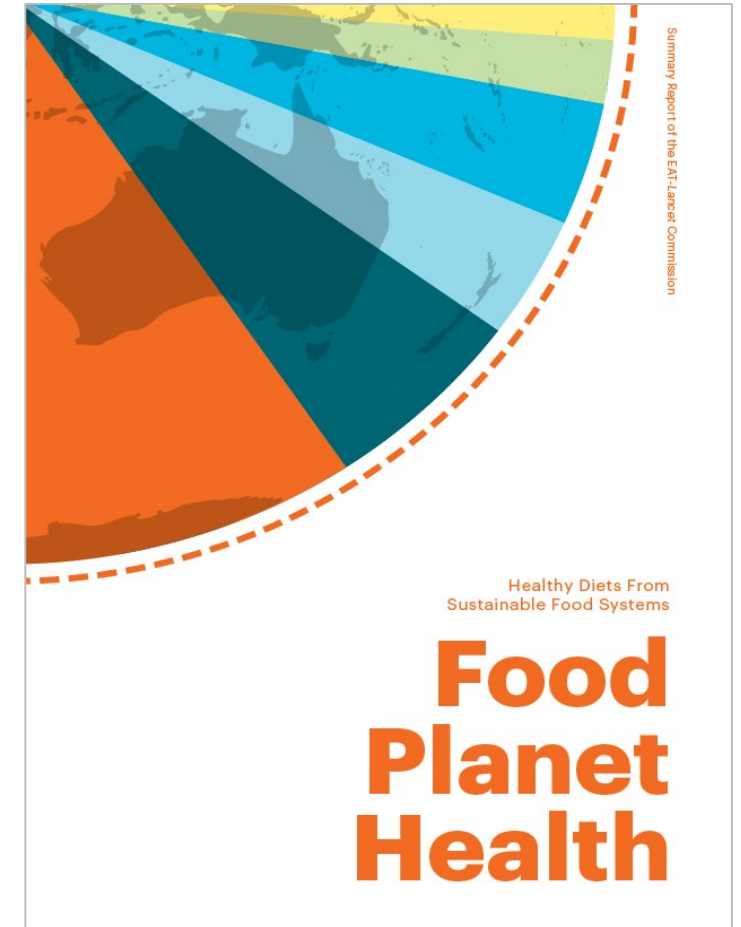
FAO 2017



EAT-Lancet 2019

# EAT-Lancet report claims to define “healthy, sustainable” diets

- Premise: Current diets are harming human and planetary health.
- A major global food transformation to shift the world’s population to eating plant-based diets is needed now.
- Greenhouse gas emissions (GHGe, methane and nitrous oxide) identified as the largest projected environmental impact of the food system by 2050
- Animal products – especially meat – are identified as the largest GHGe contributors.



The EAT Commission published the *EAT-Lancet Report on Food, Planet and Health* on January 16, 2019.

<https://eatforum.org/eat-lancet-commission/>



NationalDairyCouncil.org



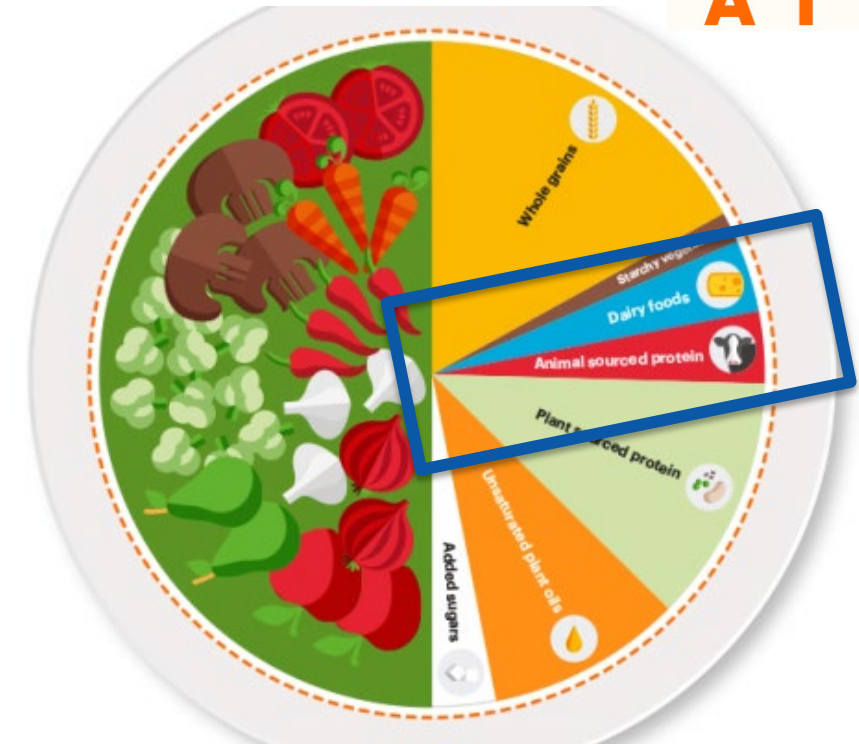
@NtlDairyCouncil

**NDC**  
NATIONAL DAIRY COUNCIL™



# EAT-Lancet report recommends global “healthy reference diet”

- Not based on a transparent, systematic review of body of evidence on nutrition, diets and health
- Does not meet nutrient needs for all
- Linked to lower mortality risk, unclear about NCDs
- Put in context of global consumption pattern
- Are recommendations affordable?, accessible?, culturally-appropriate?





# Nutrient Profiling



NationalDairyCouncil.org



@NtlDairyCouncil

**INTERNAL AND CONFIDENTIAL  
NOT FOR DISTRIBUTION**

*Confidential Trade Secret and Commercial Information – Exempt from FOIA under 5 U.S.C. 552(b)(4)*



# Nutrient profiling informs a range of policies and regulations

***“The science of classifying or ranking foods according to their nutritional composition for reasons related to preventing disease and promoting health”***

- World Health Organization

## Popular Applications

Regulation of claims



“Healthy” definition

School food programs



Front of pack labeling



M2K restrictions



NationalDairyCouncil.org



@NtlDairyCouncil

**INTERNAL AND CONFIDENTIAL  
NOT FOR DISTRIBUTION**

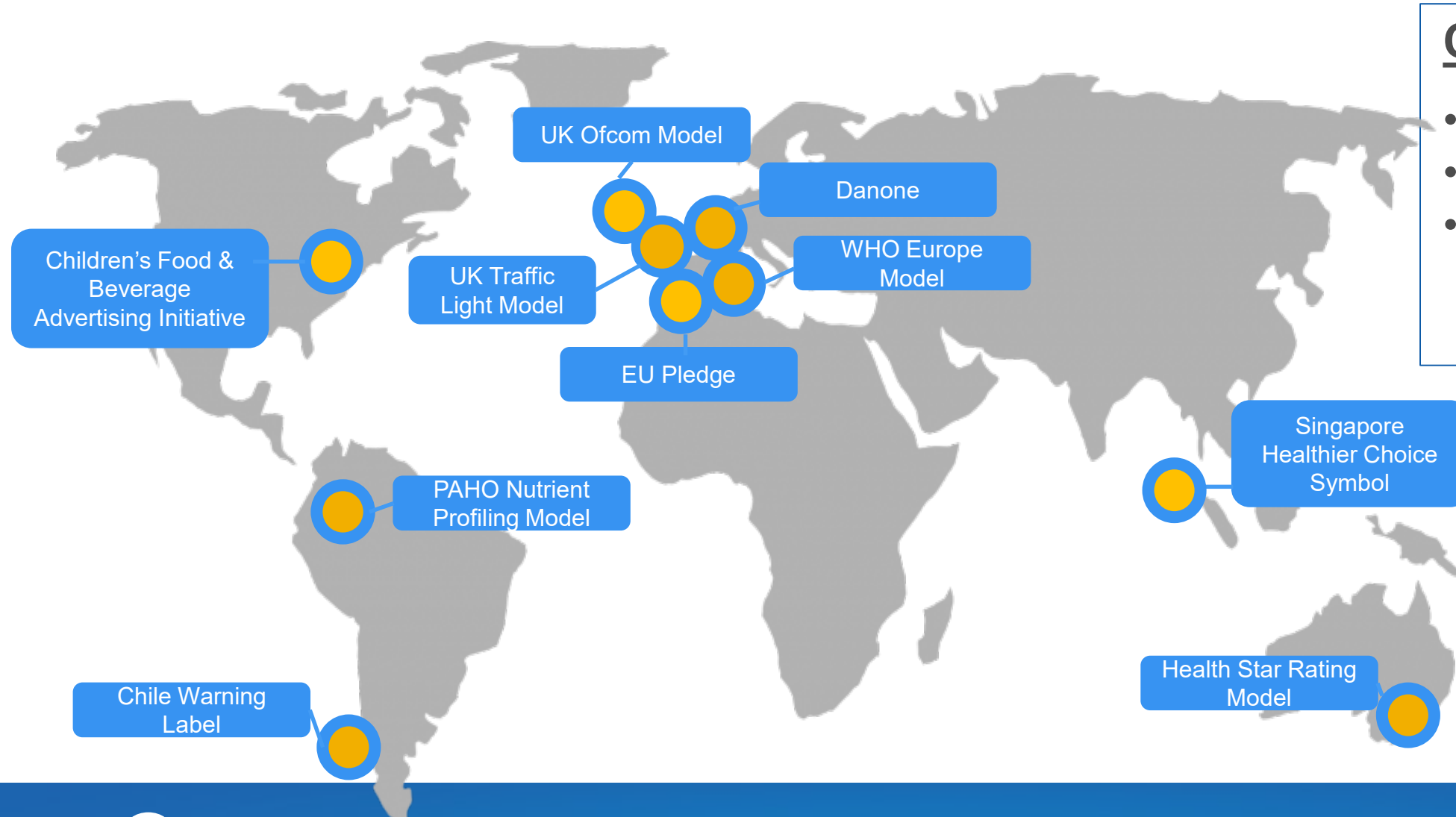
Confidential Trade Secret and Commercial Information – Exempt from FOIA under 5 U.S.C. 552(b)(4)



# Ten models were chosen for analysis

## Criteria

- Dairy relevance
- Global relevance
- Geographically and functionally diverse



NationalDairyCouncil.org



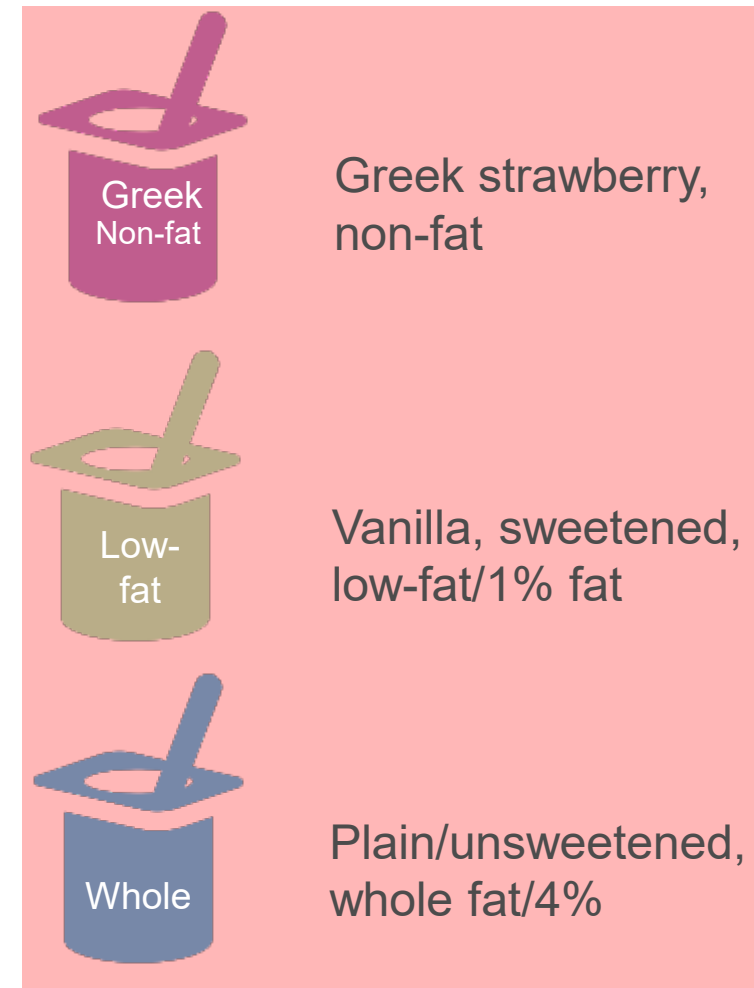
@NtlDairyCouncil

**INTERNAL AND CONFIDENTIAL  
NOT FOR DISTRIBUTION**

*Confidential Trade Secret and Commercial Information – Exempt from FOIA under 5 U.S.C. 552(b)(4)*



# Ten dairy products were selected for model application



NationalDairyCouncil.org




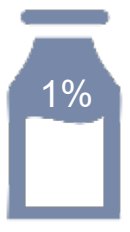
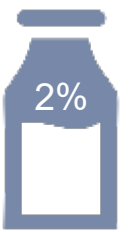
@NtlDairyCouncil

**INTERNAL AND CONFIDENTIAL  
NOT FOR DISTRIBUTION**

*Confidential Trade Secret and Commercial Information – Exempt from FOIA under 5 U.S.C. 552(b)(4)*



Across ten models, milk is rated positively **73% of the time**


	Health Star Rating	CFBAI	Chile Warning Label	Danone	EU Pledge	PAHO	Healthier Choice	WHO Europe	UK Ofcom	UK Traffic Light
	★★★★★	X	X	X	✓	X	X	✓	-1	Sodium Fat Sat Fat Sugar
	★★★★★	✓	✓	✓	✓	✓	✓	✓	-1	Sodium Fat Sat Fat Sugar
	★★★★★	X	✓	✓	✓	✓	X	X	0	Sodium Fat Sat Fat Sugar







# Across ten models, yogurt is rated positively 67% of the time

	Australia/ NZ Health Star Rating	CFBAI	Chile Warning Label	Danone	EU Pledge	PAHO	Singapore Healthier Choice	WHO Europe	UK Ofcom	UK Traffic Light
	★★★★★	✓	✓	X	X	✓	X	X	-3	Sodium Fat Sat Fat Sugar
	★★★★★	✓	✓	X	X	✓	✓	X	0	Sodium Fat Sat Fat Sugar
	★★★★★	X	✓	✓	✓	✓	X	X	1	Sodium Fat Sat Fat Sugar



Across ten models, cheese is rated positively **10% of the time**

	Health Star Rating	CFBAI	Chile Warning Label	Danone	EU Pledge	PAHO	Singapore Healthier Choice	WHO Europe	UK Ofcom	UK Traffic Light
		X	X	X	X	X	X		17	Sodium Fat Sat Fat Sugar
		X	X	X	X	X	X	X	13	Sodium Fat Sat Fat Sugar
		X	X	X	X	X	X	X	18	Sodium Fat Sat Fat Sugar
		X	X	X	X	X	X	X	21	Sodium Fat Sat Fat Sugar



# Nutrient profiling continues to evolve

- Globally, the number of NP models growing leading to inconsistent definitions of “healthy” foods
- Country-specific dietary guidelines can inform future models & link to overall public health goals
- NP models could evolve to include additional non-nutrient components (processing, environmental impact, etc.)



# Science-based Dietary Guidelines help ensure policies meet public health goals

Dietary Guidelines underpin food & nutrition policies:

- A science-based process ensures integrity of guidelines and associated policies
- Dairy foods are a core part of Healthy US Dietary Patterns
- *Sustainable diets aren't sustainable if they do not meet nutrition and health needs of the population*
- *We eat foods, not nutrients – identifying “healthy” foods based on content of nutrients to reduce may have unintended consequences*



# Extra slides



NationalDairyCouncil.org



@NtlDairyCouncil



# NDC educates and engages stakeholders to demonstrate the value of dairy in health and sustainability



## NDC

- Conducts research in nutrition, product & environment
- Participates in public processes with information & education
- Conducts integrated thought leader education & outreach
- Collaborates with dairy community partners
- Is developing a global perspective and network of experts on emerging topics





# 2019 EAT Lancet Report Media Impact Update Since Publication

## UPON RELEASE IN JANUARY:

- Since its publication (1/17), the report generated **5800 articles in 118 countries with over on 1M shares on social media.**
- From Jan – Feb, approx. **1,500 unique stories**, and dairy mentioned **approx. 500 times**
- International coverage VS U.S. = 4:1

### **Themes:**

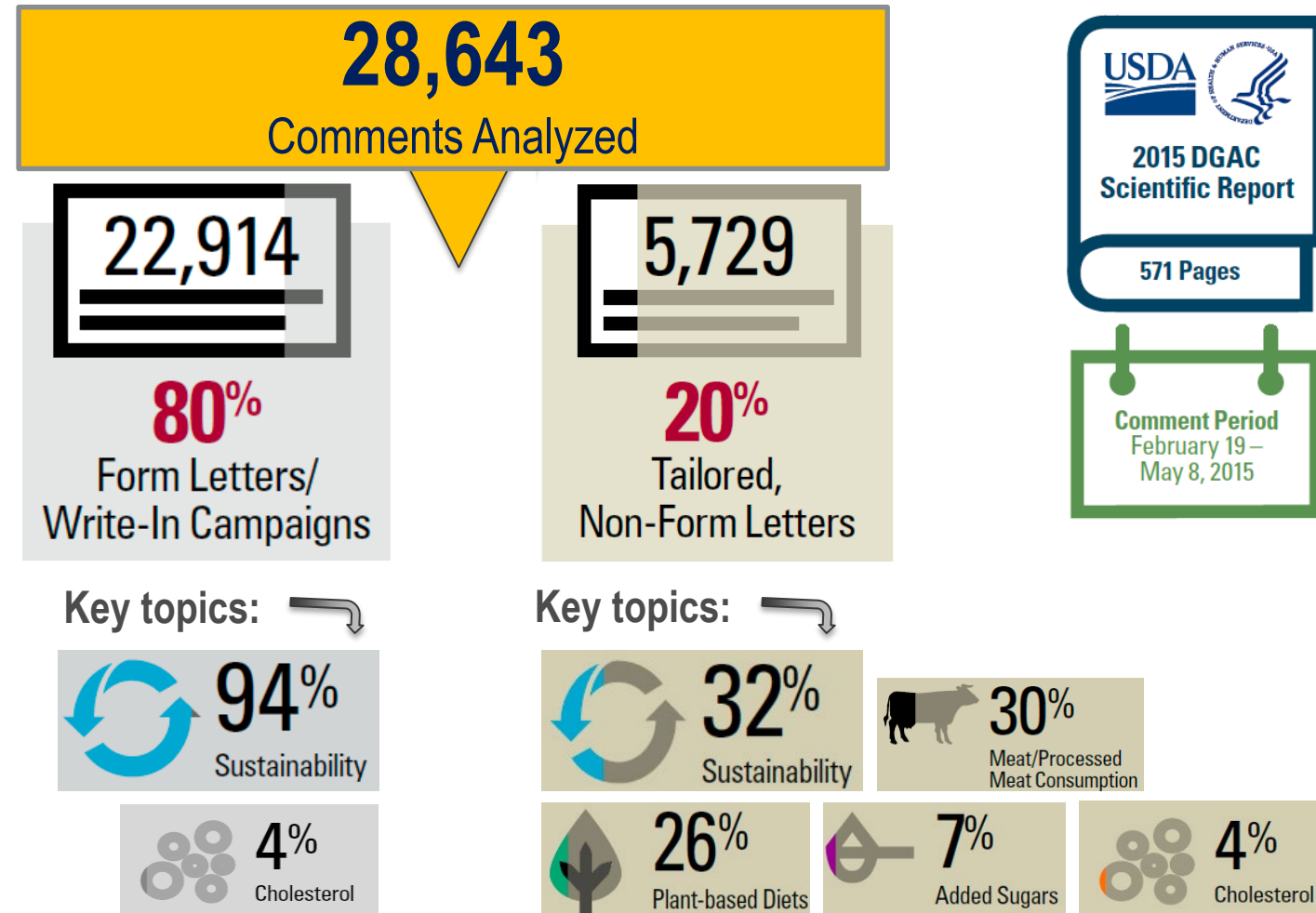
- Strong focus on reducing consumption of meat, sugar and dairy
- Push toward dietary patterns rich in plant-based foods and lower in animal-sourced foods
- Sense of urgency tone

## SECOND PHASE OF NEW COVERAGE:

- The coverage shifted to questioning the validity of the recommendations; challenging the science behind them, and focused on the personal behaviors of the funders of the report.
- Declining interest by the media in the report and the launch events.



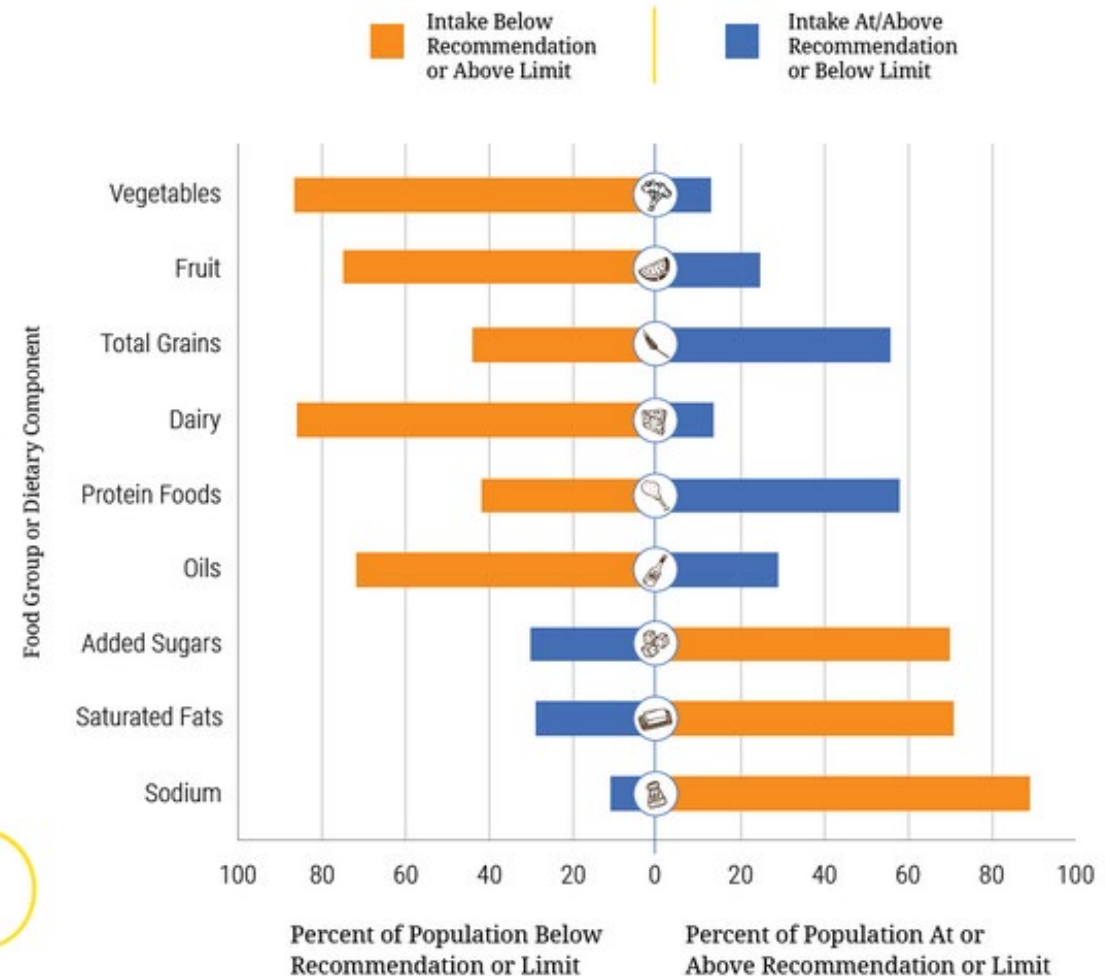
# Public comments on 2015 DGAC Report emphasized sustainability



foodminds  
© 2015

# Most Americans do not meet DGA recommendations

“Choose nutrient-dense foods and beverages across and within all food groups in place of less healthy choices”



# Nutrient profiling can support diverse stakeholder needs



**Consumer-Advocate  
Groups**

Guide consumer-friendly policies that make healthy choices easier



**Public Health  
Academics**

Define healthy foods and their impact on public health



**Governments**

Form the basis of policies and programs to improve population health



**Global Public  
Health Authorities**

Provide guidance to member countries for implementing policies



**Food Industry**

Steer product reformulation and innovation, or inform “healthier for you” options

