

# Issues Briefing

Meetings of the  
IDFA Executives Council and Industry  
Segment Boards

*Tuesday, March 26, 2019*  
*McCormick Place | Chicago*





# President's Report



# 525 MEMBERS



# SALES GREATER THAN \$100 BILLION

# IDFA Represents the Dairy Industry



Milk



Farmer Co-ops



Cheese



Yogurt



Ice Cream



Retailers



Infant Formula



Dairy Ingredients

# IDFA Executive Team



Michael Dykes



Dave Carlin



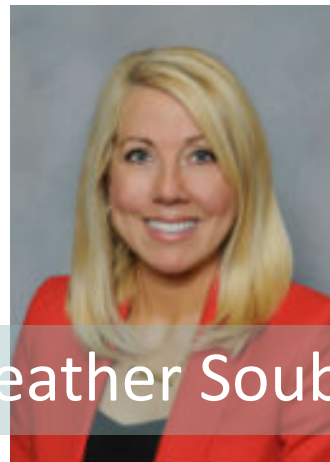
Cary Frye



Matt Herrick



Neil Moran



Heather Soubra



Tom Wojno

MAKING A DIFFERENCE FOR DAIRY

# New Governance Structure Implemented

IDFA Executive Council

Industry Segment Boards

IDFA Fluid  
Milk Board

IDFA Ice  
Cream Board

IDFA Cheese  
Board

IDFA Yogurt  
and Cultured  
Products  
Board

IDFA  
Ingredients  
Board

National  
Yogurt  
Association

Committee Restructure

MAKING A DIFFERENCE FOR DAIRY



# New IDFA Dues Model Approved



### PILLARS OF SUCCESS

IDFA identified four pillars of success that the dues model would strive to achieve.

-  **Simple** – easy to understand
-  **Transparent** – no complex formulas or hidden costs
-  **Equitable** – level playing field for all members
-  **Stable** – constant revenue stream to support growing member services and expert staff

# Our Dairy Industry





# Our Dairy Industry: Looking Ahead



- Fewer, larger farms
- More direct producer participation in plant investment
- US milk production outstrips domestic demand and producers will continue to grow further.
- Less Class I utilization
- Processor consolidation will continue
- More exports in a challenging global marketplace
- Consumers are demanding more.....

Uncertainty

Opportunity

Dynamic

Consolidation

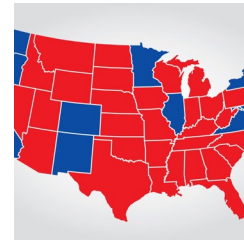
Going Forward

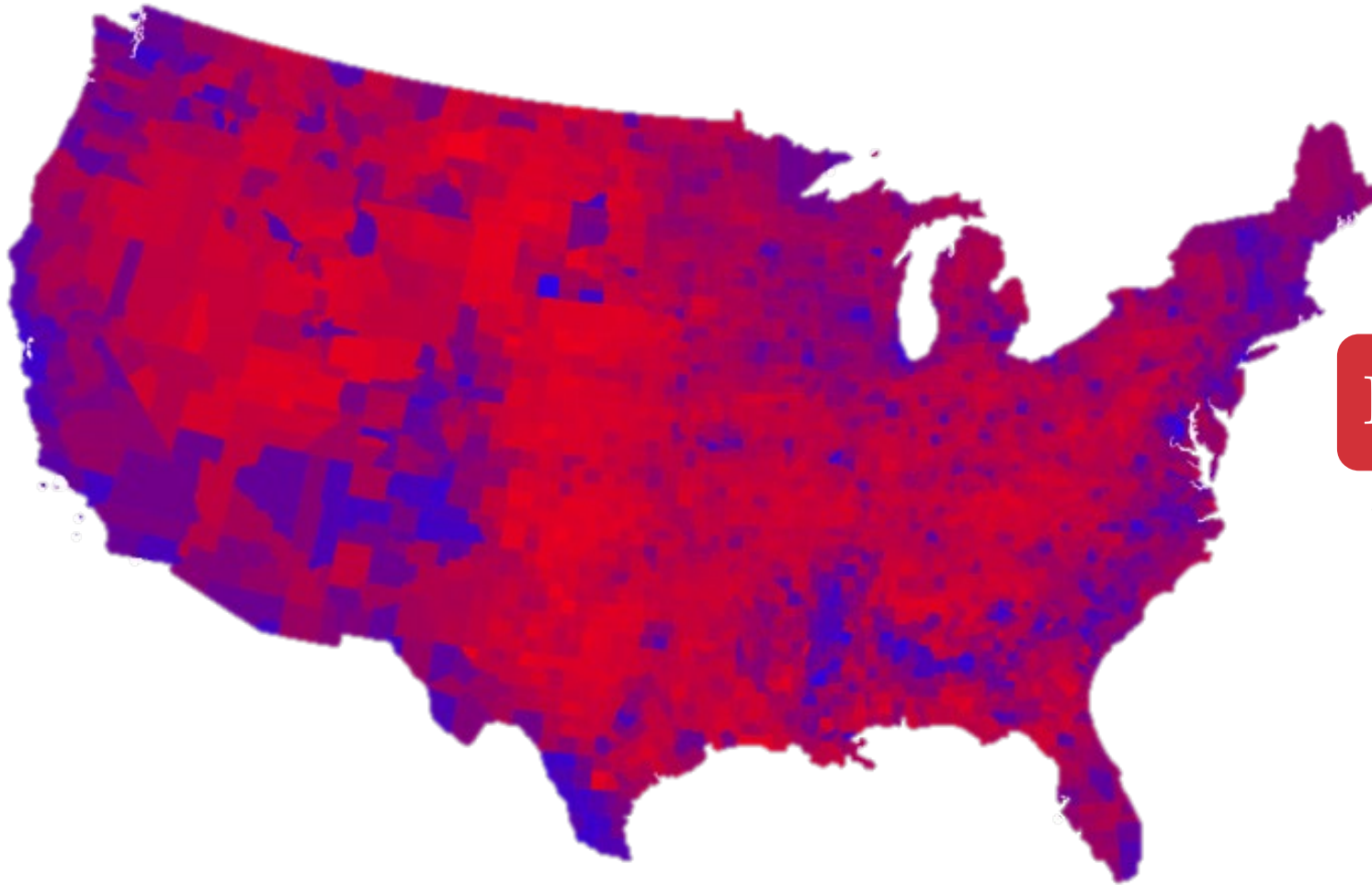




# Political Outlook

# Political Landscape: Partisanship Continues





## Rural/Urban Divide –

- **34 districts** – 50% or more rural
- **155 districts** – 95% or more urban
- **Top 50 most rural districts: 40 R's vs. 10 D's**



# Executive Branch



## Funding Debate in September

- No more shutdowns!
- Debt Ceiling Increase – lot of controversy!

## Much Debate and No Action

- Immigration
- Medicare for all
- Prescription Drug Prices
- New Green Deal
- Infrastructure

# Election 2020



MAKING A DIFFERENCE FOR DAIRY

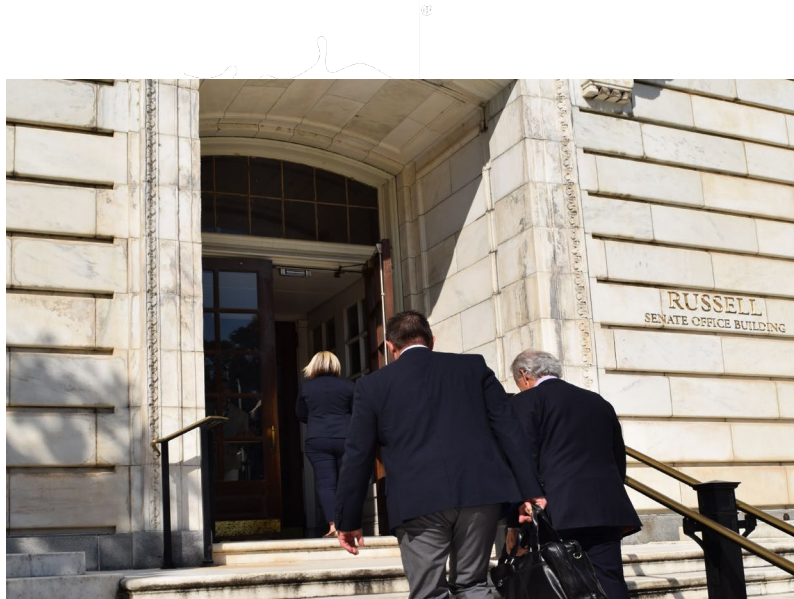


# Election 2020: A Crowded Field



MAKING A DIFFERENCE FOR DAIRY

# IDFA Working for Members



Advocacy



Regulatory



**IDFA**  
INTERNATIONAL  
DAIRY FOODS  
ASSOCIATION

## Dairy Delivers

The Economic Impact of Dairy Products in California

<b>Direct Jobs:</b> 104,712	<b>The total economic impact of dairy products produced and sold specifically in California:</b> \$97.93 billion
<b>Wages:</b> \$5.34 billion	<b>The amount dairy companies contribute to California's GDP:</b> 1.11%
<b>Economic Impact:</b> \$29.52 billion	<b>The amount dairy companies contribute to the U.S. GDP in 2017:</b> 1.09%
<b>Federal Tax:</b> \$7.11 billion	<b>A further 285,463 jobs</b> were indirectly supported by the dairy industry through suppliers and the indirect impact of the industry's expenditures.
<b>State Tax Revenues:</b> \$4.77 billion	

DAIRY MATTERS

Communications



# Member Dues Model





# MEMBER DUES MODEL



# Dues Model Approval



## Executive Council Approved New Dues Model

- Background & Rationale
- Process & Execution
- Timing & Next Steps

# Dues Model Background & Rationale



## WHY A NEW DUES MODEL?

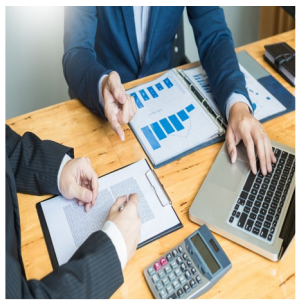
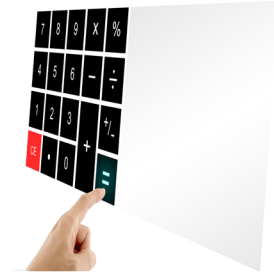
- Align with new governance model – inclusive of all dairy
- Reconcile 3 separate dues structures that were never designed to be consistent across categories
- Facilitate bringing in members who don't easily fit in a milk, ice cream or cheese bucket
- Over the years, inconsistencies developed
- Need to stabilize and secure funding for IDFA to ensure continuation of programs and activities members value

# Dues Model Pillars of Success



Fair and Equitable

Simple



Sustainable Revenue  
for Future IDFA

# IDFA Member Model Timeline

## PHASE 1 Pilot & Exploration

**Nov. 17' - January '18**

IDFA Staff developed draft evaluation and framework for governance and membership model

**January '18**

- Convened 12 Board Member Working Group
- Partnered with The Moery Company

**Jan. – Mar. '18**

- Moery Member Interview/Evaluation Process
- Budget & Finance Presentation
- Support/Approval to proceed with project

**May Board Meetings '18**

- Moery Presentation of Model Recommendations
- Board Vote to Move to Phase 2 of Dues and Governance Work



# IDFA Member Model Timeline



## PHASE 2 Refined Model

May '18

- Partnered with Dr. Andrew Novakovic
- Evaluated factors for dues model options

Feedback Sessions  
(June '18 – Sept. '18)

- 3 Board Input & Listening Sessions
- 3 Webinars
- Over 80 1:1 calls with members

Fall Board Meetings  
Oct. '18

- Consensus reached on Governance Structure
- Refinement of dues model

Dec. '18 – Mar. '19

- Finalized Dues Model
- Reviewed Structure with all executive council members
- **March 25: Executive Council Approval**

# Partnered with Association/Industry Experts



J.P. Moery –  
The Moery  
Company

- Association Expert
- Ensured work was in line with association best practice
- Guidance on revenue strategies, sponsorship, business partner work

Dr. Andrew  
Novakovic

- Dairy Economist/Industry Expert
- Evaluated 14 different models with three different metrics
- Analyzed member input and output data to ensure integrity of model

# 3 Metrics Explored: Learnings



## Revenue

- Pros: Universal Metric
- Cons: Can be misleading w/Commodity and Market Fluctuation, Collection of sensitive revenue data could be a challenge

## Milk Solids Input

- Pros: Universal metric across all segments, Positive indicator of size of business/operation and therefore dues.
- Cons: Model yielded significant swings in dues, data collection a challenge

## Outputs, Simplified

- Pros: Familiar data reporting, opportunity to account for new products/segments, one factor per category, more stable than milk inputs
- Cons: Not one singular metric across all segments/products

# NEW IDFA Model – Outputs, Simplified.



One dues rate per product category

Eliminated all break rates

Raised Minimums

All members see share of dues increase – no dues go down

Equitable share of dues by segment in association

Proportional contribution % to the size of each industry segment

# NEW Model Dues Rates



<u>Product Categories</u>	<u>New Dues Rates &amp; Calculation</u>
Milk, Cream & Other Fluid Products (in quarts).....	\$70.00 per million quarts (quarts x .000070)
Yogurt, Cultured Products & Other Refrigerated Products (in pounds).....	\$75.00 per million pounds (pounds x .000075)
Ice Cream & Frozen Desserts (in gallons).....	\$140.00 per hundred thousand gallons (gallons x .00140)
Cheese (in pounds) .....	\$160.00 per million pounds (pounds x .000160)
Secondary Ingredients (in \$ sales) .....	\$33.00 per million dollars in sales (\$sales x .000033)
Dairy-derived Ingredients/Finished Products with Dairy Ingredients (in \$ sales).....	\$100.00 per million dollars in sales (\$sales x .000100)
Butter (in pounds).....	\$33.00 per million pounds (pounds x .000033)

# NEW Gold/Business Partner Schedules



## Business Partner

Annual Gross Sales to the Dairy Processing Industry	Annual Membership Dues
< \$ 5.0 million .....	\$2,500
\$ 5.0 - 8.9 million .....	\$3,000
\$ 9.0 - 14.9 million .....	\$3,500
\$ 15.0 - 18.9 million .....	\$4,000
> \$ 19.0 million .....	\$5,000

## Gold Business Partner

Annual Gross Sales to the Dairy Processing Industry	Annual Membership Dues
< \$ 9.0 million .....	\$ 5,000
\$ 9.0 - 14.9 million .....	\$ 8,000
\$ 15.0 - 18.9 million .....	\$12,500
\$ 19.0 - 24.9 million .....	\$16,000
\$ 25.0 - 49.9 million .....	\$18,500
> \$ 50.0 million .....	\$25,000

## PHASE 3 – Communicate & Execute

### April 2019

- IDFA to send out communication to full membership
- Send company by company dues projections
- Webinar Series

### April – May 2019

- Collect and Finalize Dues Data from Dues Projection Sheets

### May – June 2019

- IDFA to send out invoices
- New dues invoices due August 2019

# Membership Packet - DUES



## New Dues Model Summary

- Background and Context
- Rationale for Change
- Dues Model Detail and Timeline



# Membership Packet - DUES



## EXAMPLE

**IDFA Member Dues for FY2020**  
**July 1, 2019 – June 30, 2020**  
 Based on Calendar Year 2017 Member Survey Data

### ABC Dairy

*(Please return survey no later than May 15th)*

Product Category	CY2017 Data Reported (New Data to be Added *)	New Formula for Calculating Member Dues	FY2020 Dues Amount Based on New Dues Rates
Milk, Cream & Other Fluid Products (in quarts)	175,658,420	x \$0.000070	\$12,296
Yogurt, Cultured Products & Other Refrigerated Products (in pounds)	154,295,486	x \$0.000075	\$11,572
Ice Cream & Frozen Desserts (in gallons)	5,443,297	x \$0.00140	\$7,621
Cheese (in pounds)	85,443,387	x \$0.000160	\$13,671
Secondary Ingredients (in \$ sales)		x \$0.000033	\$0
Dairy-derived Ingredients/Finished Products with Dairy Ingredients (in \$ sales)		x \$0.000100	\$0
Butter (in pounds)		x \$0.000033	\$0
Total FY2020 Projected Dues based on CY2017 data (and new data added)			\$45,160
Total FY2020 Actual Dues with \$25,000 Cap			N/A

Total FY2019 Dues Paid \$38,588

## SAMPLE DUES PROJECTION

- Projected dues based off submitted CY2017 Volumes
- Please review, add any products not previously captured in dues survey: Ingredients, Butter
- Send back to IDFA by May 15

# Membership Packet - DUES



## INTERNATIONAL DAIRY FOODS ASSOCIATION Dues Rate Schedule and Product Category Definitions

Dues Rate Schedule	
Product Categories	Dues Rates
Milk, Cream & Other Fluid Products	\$ 70.00 per million quarts
Yogurt, Cultured Products & Other Refrigerated Products	\$ 75.00 per million pounds
Ice Cream & Frozen Desserts	\$140.00 per hundred thousand gallons
Cheese	\$160.00 per million pounds
Secondary Ingredients	\$ 33.00 per million dollars in sales
Dairy-derived Ingredients/Finished Products with Dairy Ingredients	\$100.00 per million dollars in sales
Butter	\$ 33.00 per million pounds

Sales to include volume/sales for all of your operations, including operations purchased or acquired up until the time of reporting, including sales from joint ventures and subsidiaries, and including company brands and private label, whether processed by the company or purchased from others, sold to retailers, home consumers, foodservice establishments (e.g., institutions, hotels, etc.), brokers, dairy and food companies, etc.

### Definition of Product Categories

**Milk, Cream & Other Fluid Products** (packaged or bulk) to include, but not limited to: All milk, flavored milk and milk drinks, protein shakes, cream, half and half, heavy cream, light cream, aerosol whipped creams, eggnog, yogurt drinks and smoothies, cultured and/or acidified milks, kefir, buttermilk, evaporated milk, condensed milk, sweetened condensed milk, ultrafiltered milk, ice cream & frozen dessert mixes; reduced fat, lowfat, nonfat variations; and all of the nondairy counterparts made in semblance of these products.

**Yogurt, Cultured Products & Other Refrigerated Products** (packaged or bulk) to include, but not limited to: Refrigerated yogurt, cottage cheese, sour cream, dips, puddings and other related refrigerated dairy desserts; reduced fat, lowfat, nonfat variations; and all of the nondairy counterparts made in semblance of these products. Note: Yogurt drinks, drinkable cultured products, etc., are included in the "Milk, Cream & Other Fluid Products" category.

**Ice Cream & Frozen Desserts** (packaged, bulk or novelties) to include, but not limited to: Ice cream; frozen yogurt, gelato, sorbet, sherbet, water ice, frozen custard, quiescently frozen confections, frozen puddings, frozen smoothies, soft serve (frozen); reduced fat, light, lowfat, nonfat variations; whether or not they contain milkfat and/or milk solids; and all of the nondairy counterparts made in semblance of these products.

**Cheese** (packaged or bulk) to include, but not limited to: All types of cheese, cream cheese, spreads, cheese sauces, cheese products (cheese powders, blends); reduced fat, light, lowfat, nonfat variations; and all of the nondairy counterparts made in semblance of these products.

**Dairy-Derived Ingredients:** Any wet or dry ingredient, constituent element or component derived from milk, including but not limited to: all types of whey, casein, milk protein concentrate, microfiltered milk, lactose, milkfat (butteroil, plastic

## Rates and Product Category Glossary

- New dues rates per/volume, sales
- Definitions of product categories
- To be used for future volume surveys

# Membership Packet – PROSPECTS



International Dairy Foods Association  
Top Dairy Company Prospective Members  
March 2019

International Dairy Foods Association  
Membership Recruitment Campaign  
FY2019/FY2020

International Dairy Foods Association  
Members Making a Difference for Dairy

## Gold Business Partners

Advanced Process Technologies, Inc.  
AFCO | ZEP | Booth #878  
Alchemy Systems  
All Star Purchasing  
Americold | Booth #761  
Atlantium Technologies Ltd. | Booth #1329  
Baker Tilly  
Baumer Ltd. | Booth #859  
Berrian Insurance Group  
BMO Harris Bank  
Bruker Optics | Booth #1114  
Chr. Hansen, Inc. | Booth #1017  
CliftonLarson Allen  
CME Group  
Crest Foods Company, Inc.  
Dairy.com  
Blimling and Associates, Inc.  
Delkor Systems, Inc. | Booth #621  
Diversified Search LLC

DSM  
DuPont™ Danisco® | Booth #1211  
Ecolab  
Nalco Water, An Ecolab Company  
Evergreen Packaging | Booth #828  
Faegre Baker Daniels LLP  
Fruitcrown Products Corporation  
Herbein + Company, Inc. | Booth #1134  
Hitachi America, Inc.  
IMA Dairy & Food USA  
INTL FCStone Financial, Inc.  
Kincannon & Reed Executive Search  
The McCully Group  
Mettler-Toledo Safeline | Booth #606  
Miron Construction Co., Inc. | Booth #1078  
Miura America Co. LTD. | Booth #997  
NOLUMA International, LLC  
Oppenheimer & Co. Inc.

Pecan Deluxe Candy Company | Booth #972  
Pneumatic Scale Angelus | Booth #1084  
QCS Purchasing LLC  
Quest Industrial, LLC  
Quickway Services, Inc.  
R.A Jones  
Rabobank  
Rice Dairy LLC  
Serac inc. | Booth #905  
Shell Polymers  
Star Kay White, Inc.  
T. C. Jacoby & Company, Inc.  
Tate & Lyle Custom Ingredients, L.L.C.  
Tetra Pak Inc. | Booth #603  
Trojan Technologies (Aquafine) | Booth #1348  
Virginia Dare  
Weidenhammer New Packaging, LLC

## Business Partners

3M Food Safety  
ADI Systems, An Evoqua Brand | Booth #1218  
bioMerieux, Inc. | Booth #1437  
Blackhawk Molding Co., Inc. | Booth #1122  
Curb-It LLC | Booth #995  
Custom Fabricating & Repair Inc.

## Membership Recruitment

- “Cream Of The Top” Prospect Sheet
- Recruitment Campaign Commitment
- Current Membership Listing
- Please fill out and return Commitment Sheet - IDFA Staff will follow up on recruitment effort

# Membership Packet – PFT Booth Visits



## Board Member Assigned Visits

## Dairy Supplier Gold/Business Partner Prospects



ProFood Tech 2019  
IDFA Gold Business Partner & Business Partner Exhibitors  
Executive Council/Board Member Visits  
(sorted by Executive Council/Board Member Last Name)

Executive Council/ Board Member	Company	Booth #	Booth Location	IDFA Member Type	City	State/ Prov.	Country
Gary Aggus	Evergreen Packaging, Inc.	828	General Show Space	Gold Business Partner	Cedar Rapids	IA	
David Ahlem	Miura America Co., Ltd	997	General Show Space	Gold Business Partner	Rockmart	GA	
Troy Ammann	Semi-Bulk Systems, Inc.	1424	The Dairy Pavilion	Business Partner	Fenton	MO	
Brad Anderson	Shield-It/Curb-It	995	General Show Space	Business Partner	Plain	WI	
Brian Baker	Excel Engineering Inc	1307	The Dairy Pavilion	Business Partner	Fond Du Lac	WI	
Chad Baker	Summitville Tiles Inc.	1106	The Dairy Pavilion	Business Partner	Minerva	OH	
Martin Bates	ESI Group USA	508	General Show Space	Business Partner	Hartland	WI	
Courtney Bidney	bioMerieux Inc.	1437	The Dairy Pavilion	Business Partner	Lombard	IL	

- Table Touch for Member Exhibitors



ProFood Tech 2019  
Dairy Vertical - Nonmember Exhibitors  
IDFA Partner Prospective Members  
(sorted by Pavilion and Booth #)

Company	Booth #	City	State	Country	Notes
<b>The Dairy Pavilion - sorted by Booth No.</b>					
WAPO CORPORATION	1038	Nantou City	Nantou	Taiwan	
Advanced Process Solutions	1041	Jeffersonville	IN		
Osiopack	1045	Anaheim	CA		
Spokane Industries	1056	Spokane Valley	WA		
The Probst Group	1058	Brookfield	WI		
Weiland, Inc.	1060	Norfolk	NE		
Mokon	1064	Buffalo	NY		
Ibberson	1066	Hopkins	MN		
Spartan Parts	1072	Holland	MI		
Loos Machine & Automation	1074	Colby	WI		
Q-Interline A/S	1090	Tollose		Denmark	
Pool Tap A/S	1094	Randers NO		Denmark	

- Listing of Prospect Exhibitors

THANK YOU!





# Regulatory Priorities





Cary Frye



John Allan



Danielle Quist



Michelle Matto



Taylor Boone

**IDFA REGULATORY TEAM  
2019 REGULATORY POLICY PRIORITIES**



# Regulatory Policy Priorities - 2019



## Key Issues

- FDA Multi-Year Nutrition Innovation Strategy
  - Dairy Standards Modernization
  - Use of the Names of Dairy Foods in the Labeling of Plant-Based Product
- USDA's Bioengineered Food Disclosure Standard
- FDA's Changes to the Nutrition Facts Label
- Define "Natural Cheese"
- Dietary Sodium Reduction
- Child Nutrition Reauthorization
- Dietary Guidelines for Americans 2020-2025
- World Health Organization



MAKING A DIFFERENCE FOR DAIRY



# Regulatory Policy Priorities – 2019 (cont.)



## Key Issues

- Implementation of FDA's Food Safety Modernization Act
- National Conference on Interstate Milk Shipments
- FDA Listeria Policy Guidance
- EPA Risk Management Program
- Department of Transportation Hours of Service Rules
- Emerging Contaminants
- National Organic Standards Board (NOSB)
- OSHA Tracking of Workplace Injuries and Illness

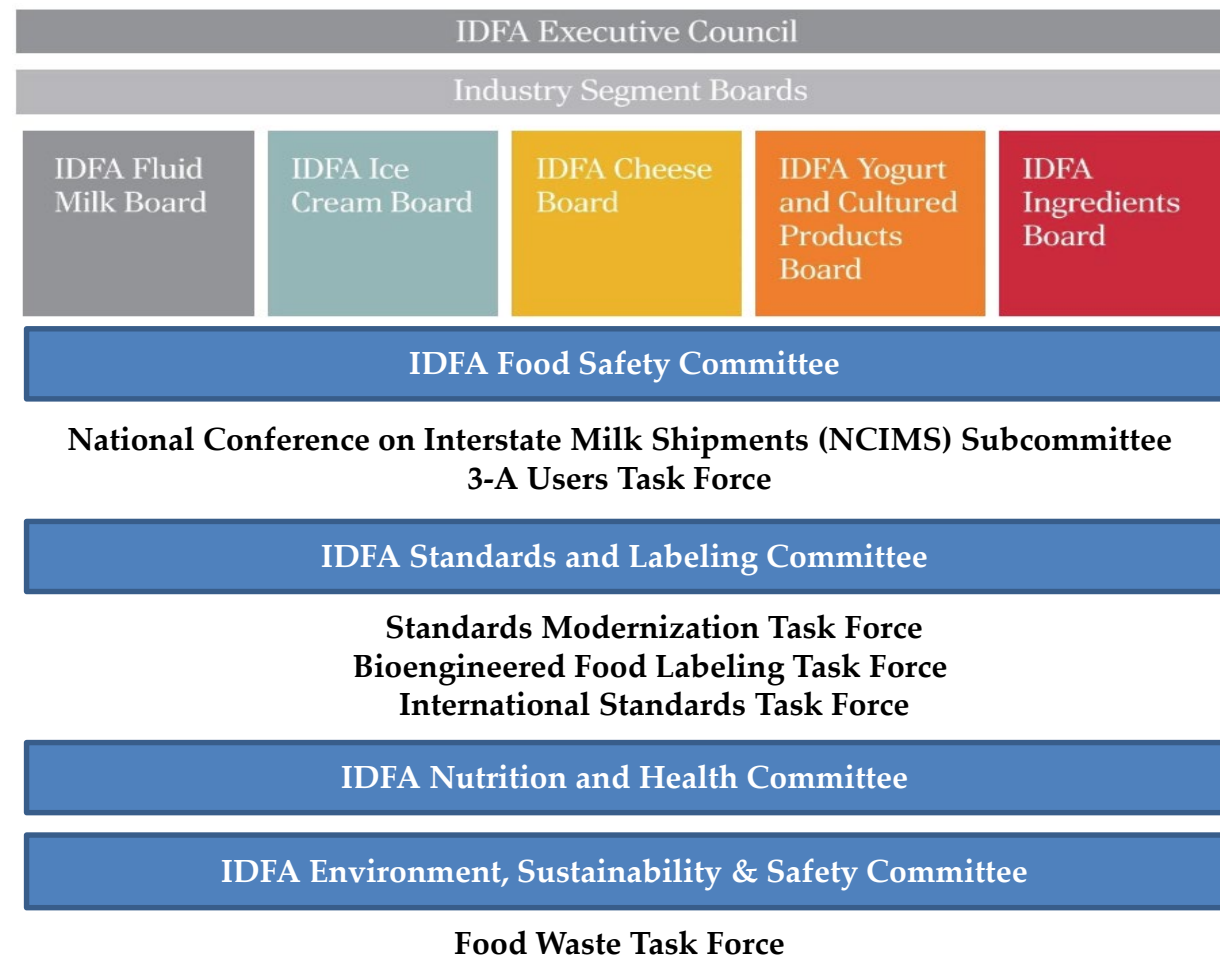


MAKING A DIFFERENCE FOR DAIRY

# Regulatory Committee Restructure



- Reorganize committees, subcommittees and ad hoc task forces based on horizontal approach by issue rather than product category
- Existing milk, ice cream, cheese and yogurt regulatory committees to be replaced by topic specific committees and a new NCIMS subcommittee
- Existing ad hoc task forces will remain and report to the appropriately designated committee





# Overview of FDA's Multi-Year Nutrition Innovation Strategy

*Cary Frye*



**IDFA**  
INTERNATIONAL  
DAIRY FOODS  
ASSOCIATION

# FDA's Nutrition Innovation Strategy



Modernizing Standards of Identity

Modernizing Claims

Modernizing Ingredient Labels

Implementing Nutrition Facts Label

Reducing Sodium



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# FDA Nutrition Innovation Strategy



## IDFA Written Comments

- Input from IDFA's Regulatory Committees and Standards Modernization Task Force members
- Aligned with previous policy recommendation for CFSAN Regulatory Reform
- Food standards modernization a must
- Hold off on "Healthy" icon
- Support simple ingredient labeling
- Transform Temporary Marketing Permit process
- Push for action on long, pending dairy petitions
  - Completion of yogurt standards (2009)
  - Finalize regulation for the use of UF (2000) and allow MF milk for cheese with labeling of milk



# FDA Nutrition Innovation Strategy

- September 28<sup>th</sup> - FDA announced its Request for Information on “Use of Name of Dairy Foods in Labeling Plant-Based Products”
- Help FDA determine how to develop guidance for labeling plant-based products
- Seeking information, data, consumer research to determine if labeling using dairy terms “milk,” “yogurt,” & “cheese” are confusing or misleading to consumers
- Do consumers understand difference between the basic nature, characteristics, ingredients and nutritional content of plant-based products and their dairy counterparts?
- IDFA filed written comments January 28<sup>th</sup> that provided consumer research and specific data on 8 of the 20 questions FDA asked. – FDA is analyzing 13,000+ comments!





# Dietary Guidelines for Americans 2020

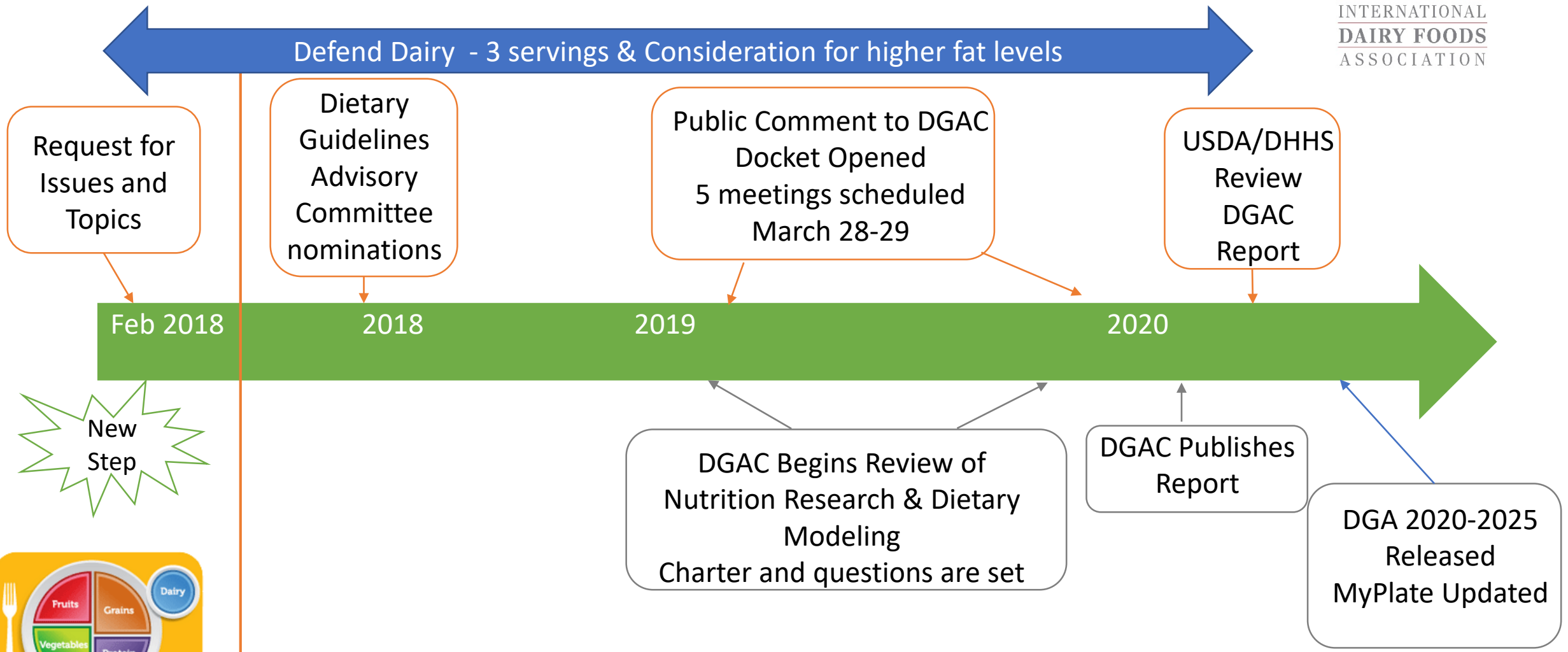
*Cary Frye*



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# Dietary Guidelines 2020 Process



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MAKING A DIFFERENCE FOR DAIRY



# Dietary Guidelines 2020 Process

THIS IS A MULTI-STEP PROCESS

## Advisory Committee Selection


- USDA/HHS post topics and questions, which shape expertise needed on the 2020 Dietary Guidelines Advisory Committee
- USDA/HHS solicit nominations for the Committee from the public for 30 days
- USDA/HHS select Committee membership based on educational background, professional experience, demonstrated expertise, obligations under the Federal Advisory Committee Act, and requirements for a balanced membership
- Secretaries of USDA/HHS jointly agree on individuals appointed to serve on the Committee



2



3  
Advisory Committee  
Review of Scientific  
Evidence



4  
USDA/HHS Develop  
the Dietary Guidelines



1  
Topic and Question  
Identification

THIS IS COMPLETED

The 2020-2025 Dietary Guidelines for Americans development process is under way. Updating the Dietary Guidelines for Americans is a multi-step, multi-year process.

# Dietary Guidelines 2020 Advisory Committee



- ★ *Jamy Ard, MD – Wake Forest School of Medicine*
- Regan Bailey, PhD, MPH, RD – Purdue University*
- Lydia Bazzano, MD, PhD – Tulane University and Ochsner Health System*
- Carol Boushey, PhD, MPH, RD – University of Hawaii*
- Teresa Davis, PhD – Baylor College of Medicine*
- Kathryn Dewey, PhD – University of California, Davis*
- ★ *Sharon Donovan, PhD, RD – University of Illinois, Urbana*
- Steven Heymsfield, MD – Louisiana State University, Pennington Biomedical Research Center*
- ★ *Ronald Kleinman, MD – Massachusetts General Hospital, Harvard Medical School*
- ★ *Heather Leidy, PhD – University of Texas at Austin (Summer 2019)*

- Richard Mattes, PhD, MPH, RD – Purdue University*
- Elizabeth Mayer-Davis, PhD, RD – University of North Carolina at Chapel Hill*
- Timothy Naimi, MD, MPH – Boston University*
- Rachel Novotny, PhD, RDN, LD – University of Hawaii*
- Joan Sabaté, DrPH, MD – Loma Linda University*
- ★ *Barbara Schneeman, PhD – University of California, Davis*
- Linda Snetselaar, PhD, RD – University of Iowa*
- Jamie Stang, PhD – University of Minnesota*
- Elsie Taveras, MD, MPH – Massachusetts General Hospital, Harvard Medical School, and Harvard Chan School of Public Health*
- Linda Van Horn, PhD, RDN, LD – Northwestern University*



Questions?



**IDFA**

INTERNATIONAL  
DAIRY FOODS  
ASSOCIATION



Preparation  
for 2019  
National  
Conference on  
Interstate Milk  
Shipments

*John Allan*



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ASSOCIATION

# 2019 NCIMS Preparation



- 2019 NCIMS:
  - April 26-May 1, 2019
  - St. Louis, MO
  - Hyatt Regency at the Arch
- 75 proposed changes to the PMO
  - Shared with committees on Mar. 7
- IDFA Proposal Review Meeting:
  - March 27-28 (afternoon/morning)
  - Chicago, McCormick Place (in conjunction with ProFood Tech)

**Grade “A”**

**P**asteurized

**M**ilk

**O**rdinance

## Appendix N – Vet Drug Residues

- Residue Testing Expansion Pilot:
  - NCIMS Exec. Board approved suspension of Tetracycline testing after 18 months (Dec. 31, '18)
  - Appx N Committee will review results and make recommendations



# FSMA Implementation & Inspections

*John Allan*



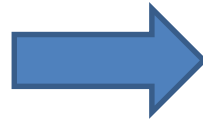
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ASSOCIATION

# FDA Food Safety Leadership Changes



**Scott Gottlieb**  
FDA Commissioner



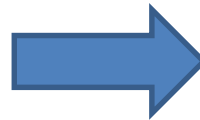
**Ned Sharpless**  
Acting FDA Commissioner



# FDA Food Safety Leadership Changes



**Stephen Ostroff**  
Deputy Commissioner for  
Foods and Veterinary Medicine



**Frank Yiannas**  
Deputy Commissioner for  
Food Policy and Response

# FSMA Inspections for Dairy Plants



Preventive Controls Rule/PMO Appendix T compliance date for  
Grade "A" products -- September 17, 2018

PMO Appendix T inspections underway now

# Who Will Inspect? When? Against What?

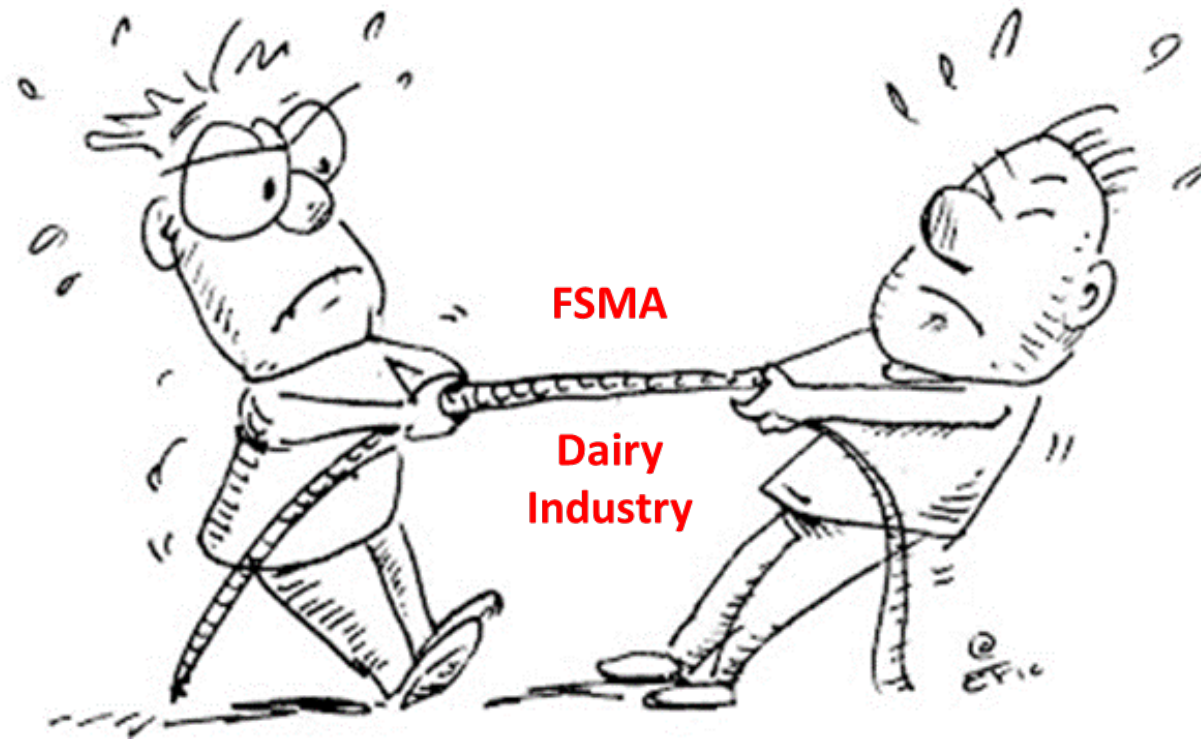


- IDFA requested consolidation of inspections of “dual-grade” plants (1 inspection)
- FDA proposed and test ran a pilot
- Stakeholder meeting held in December
- FDA revised proposal is pending
- NCIMS Liaison Committee proposal and Executive Board letter
  - Encourages single inspection
  - Proposes MSs conduct “Appendix T” inspection for non-Grade “A” dairy products in these dual-grade plants
- IDFA position: Long-term – single inspection by MSs; Short-term – two separate inspections

# Who Will Win?

**STATES**

**FDA**



**Milk Specialists**

**Consumer Safety Officers**

# Intentional Adulteration (Food Defense) Rule

## July 26, 2019

### **Mitigation Strategies to Protect Food Against Intentional Adulteration: Guidance for Industry**

#### ***Revised Draft Guidance***

**This guidance is being distributed for comment purposes only.**

Although you can comment on any guidance at any time (see 21 CFR 10.115(g)(5)), to ensure that FDA considers your comment on this draft guidance before we begin work on the final version of the guidance, submit either electronic or written comments on the draft guidance within 120 days of publication in the *Federal Register* of the notice announcing the availability of the draft guidance. Submit electronic comments to <https://www.regulations.gov>. Submit written comments to the Dockets Management Staff (HFA-305), Food and Drug Administration, 5630 Fishers Lane, rm. 1061, Rockville, MD 20852. All comments should be identified with the docket number FDA-2018-D-1398 listed in the notice of availability that publishes in the *Federal Register*.

For questions regarding this draft document contact the Center for Food Safety and Applied Nutrition (CFSAN) at 240-402-3712.

U.S. Department of Health and Human Services  
Food and Drug Administration  
Center for Food Safety and Applied Nutrition

March 2019



# Intentional Adulteration (Food Defense) Rule



IDFA's request → Flexibility in guidance and enforcement

Initial comments from IDFA members on 2<sup>nd</sup> release due  
*March 29*

(Comments due to FDA by July 5)



# National Bioengineered Food Disclosure Standard

*Danielle Quist*



# National, Uniform Disclosure Standard



Broadly applies to any food, ingredient or component intended for human consumption that requires labeling under the FDCA – raw ag products, processed or prepared and multi-ingredient items, dietary supplements, processing aids, food additives, bulk foods and enzymes.

- Defines “bioengineered” foods and ingredients
- Preempts state and local BE food labeling standards
- Establishes criteria for mandatory and voluntary disclosure of BE foods and ingredients
- Provides several disclosure options: on-package text, symbol, electronic link/QR code + phone and text message
- Exempts very small manufacturers, restaurants and similar food service establishments
- Describes general recordkeeping requirements and enforcement procedures
- Sets a mandatory compliance date of **January 1, 2022**



# USDA List of BE Foods & Common Dairy Ingredients



Alfalfa, Apple (Arctic™ varieties), Canola, Corn, Cotton, Eggplant (BARI Bt Begun varieties), Papaya (ringspot virus-resistant varieties), Pineapple (pink flesh), Potato, Salmon (AquAdvantage®), Soybean, Squash (summer) and Sugar Beet




Crop	Examples of food ingredients
Soybeans	Soybean oil, partially hydrogenated soybean oil, modified soybean oil (e.g., high-oleic), soy protein, textured vegetable protein, tofu, soy lecithin
Corn	Corn meal, corn flour, corn oil, corn starch, modified food starch, dextrose, corn syrup, high-fructose corn syrup
Cotton	Cottonseed oil, partially hydrogenated cottonseed oil
Sugar Beets	Sugar
Canola	Canola oil

# What Does “Bioengineered” Mean?

Foods with detectable amounts of genetic material modified through in vitro rDNA technology. This means:

- Many highly refined ingredients derived from BE List crops lack detectable modified genetic material – NO MANDATORY DISCLOSURE
- Many dairy products use BE enzymes, yeasts and food additives lacking detectable modified genetic material in final food – NO MANDATORY DISCLOSURE
- “GMO” “genetically engineered” not defined or used in the BE rule



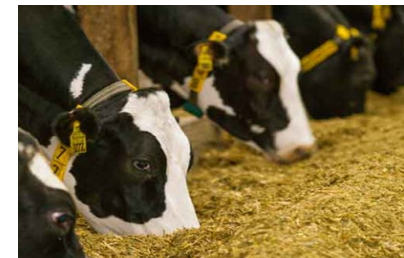
 ***Animal products (milk, meat & eggs) from animals are not BE solely because the animals consumed feed containing BE substances***

# Exemptions to Mandatory Disclosure Label

## Key Exemptions from *Mandatory* Disclosure

- 1) USDA Certified Organic
- 2) Incidental additives derived from BE, if they are exempt from labeling under FDCA
- 3) Foods with the unintentional and inadvertent presence of detectable modified genetic material below threshold of 5% in any individual ingredient

➔ NO VOLUNTARY DISCLOSURE ➜



## Recordkeeping is Key to Compliance

- (1) Records from suppliers verifying that ingredient not sourced from a BE crop;
  - (2) Records from suppliers verifying ingredient was subject to a refinement process “validated” to render modified genetic material undetectable; or
  - (3) Certificates of analysis or testing records confirming the absence of modified genetic material
- Your suppliers know their products
  - No specific testing method required
  - Absent adequate recordkeeping, USDA will presume that a food or ingredient on the BE Food List or known to be bioengineered requires disclosure

# What Will BE Disclosure Look Like?



Text

**“bioengineered food” (raw food or all BE food) or  
“contains bioengineered food ingredient” (multi-ingredient)**



Digital Link/QR Code

**“Scan anywhere on package for more food information”  
or  
“Scan icon for more food information.”  
Plus **“Call [1-000-000-0000] for more food information”****

# What Will BE Disclosure Look Like?



Text Message

**“Text [command word] to [number] for bioengineered food information”**



Shortened text available for  
small manufacturers and  
small/very small packages

# Limited Voluntary Disclosure

Foods and ingredients derived from BE Food List, but lack modified rDNA – highly refined foods

No voluntary disclosure for exemptions:

- Incidental additives
- Below 5% threshold for adventitious presence
- USDA organic certified
- Animal products from animals that merely consumed BE feed

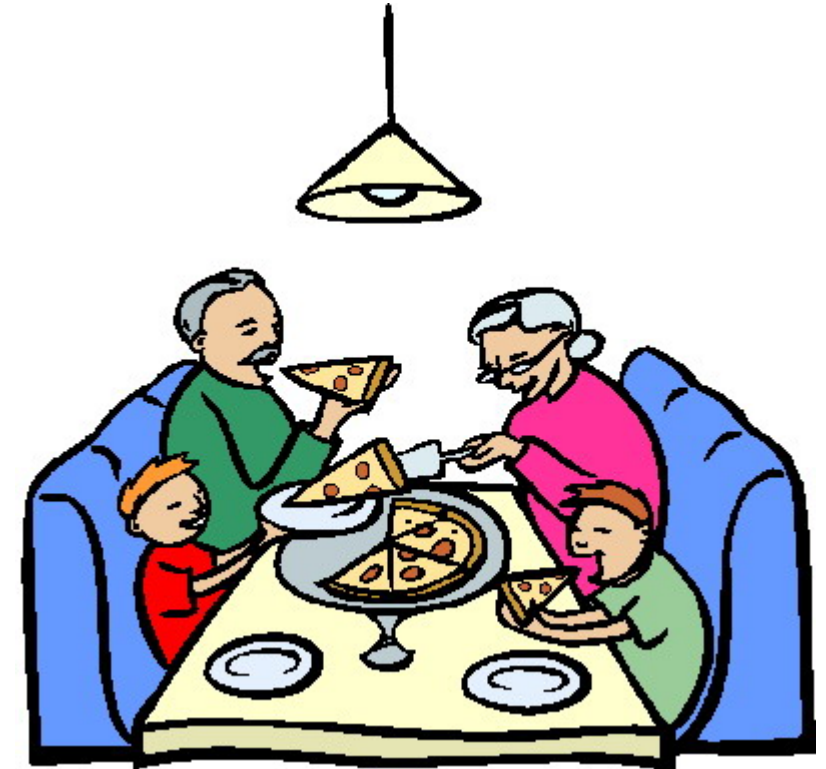
“derived from bioengineering”  
“Ingredients derived from a bioengineered source”



# Voluntary Disclosure – Exempt Entities

## Labeling BE Foods for Retail Sale:

- May voluntarily disclose foods on BE Food List that would otherwise require mandatory disclosure (or may be provided in a voluntary disclosure)
- Form of disclosure must comply with requirements for disclosure options, including small manufacturers and small/very small packages





# BE Rule & Absence Claims



Labels must comply with BE rule and FDA misbranding rules  
(truthful and not misleading)

- BE rule does not define “Non-GMO” nor address absence claims
  - USDA Certified Organic may bear a “non-GMO” claim
  - Foods that do not require a mandatory disclosure are not automatically “Non-GMO”
- BE rule standards and terminology not the same as 3<sup>rd</sup> party verification programs
  - 3<sup>rd</sup> party verification records may support decisions not to disclose, to the extent the records align with the BE rule



# Audits and Enforcement



- No private right of action against a manufacturer – complaints filed with USDA
  - States free to adopt BE standards and impose fines and injunctive relief for violations
- USDA may investigate complaints, request records and audit
- Company may request hearing and provide supporting documentation
- USDA concludes investigation by publishing public summary of investigation final results, subject to judicial review
- No AMS recall authority

# What Does this Mean For Dairy?



- **January 1, 2022** deadline will be here fast
- Labeling decisions must be supported by records
- Customers already asking for BE info
- Communicate with your suppliers
- Many dairy foods will not require a BE label



# Polyfluoroalkyl Substances (PFAS)

*Danielle Quist*



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Photo by Don J. Usner/Searchlight New Mexico



Picture taken March 11, 2019. REUTERS/Brian Snyder

**The Guardian “This has poisoned everything – pollution casts shadow over New Mexico’s booming dairy industry”** *Amy Linn, Searchlight New Mexico, 20 Feb 2019*

“Pollution from Cannon air force base has gone unreported for decades. Now it’s threatening the US food supply”

[ENVIRONMENT](#) - REUTERS

MARCH 19, 2019

“The curious case of tainted milk from a Maine dairy farm”

[Richard Valdmanis](#), [Joshua Schneyer](#)

# What Are PFAS?

- What are they?
  - PFAS: over 3500 chemical combinations (8 & 6 carbons)
  - PFOA (perfluorooctanoic acid)
  - PFOS (perfluorooctane sulfonate)
- What do they do?
  - Oil, grease, water, stain and heat resistant; industrial and consumer products and fire-fighting foams; food contact materials
  - Dissolves easily in water and found anywhere and everywhere: military bases, airports, PFAS manufactures and users, landfills, sewage sludge
- Risks?
  - Persistent, bioaccumulates – studies show risks for cancer and other serious medical conditions with long term exposure



# What are the Regulators Doing?

- States
- EPA
- FDA
- DOD
- Congress



# Next Steps



- Government agencies focusing on drinking water
- With more testing, more dairies with high levels of PFAS
- IDFA request for in-person FDA meeting – getting answers
- Reinforcing safety of milk supply
- Monitoring Congress, state and federal regulatory agencies, courts and press





# Break



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ASSOCIATION



# Legislative Priorities





Dave Carlin



Tony Eberhard



Beth Hughes



Colin Newman



Donald Grady

## IDFA LEGISLATIVE TEAM

# 2019 Legislative Policy Priorities Chart



**Confidential**  
**IDFA Legislative Policy Priorities**  
**116<sup>th</sup> Congress**  
**March 2019**

**PRIORITY RANKING BY SEGMENT BOARD**

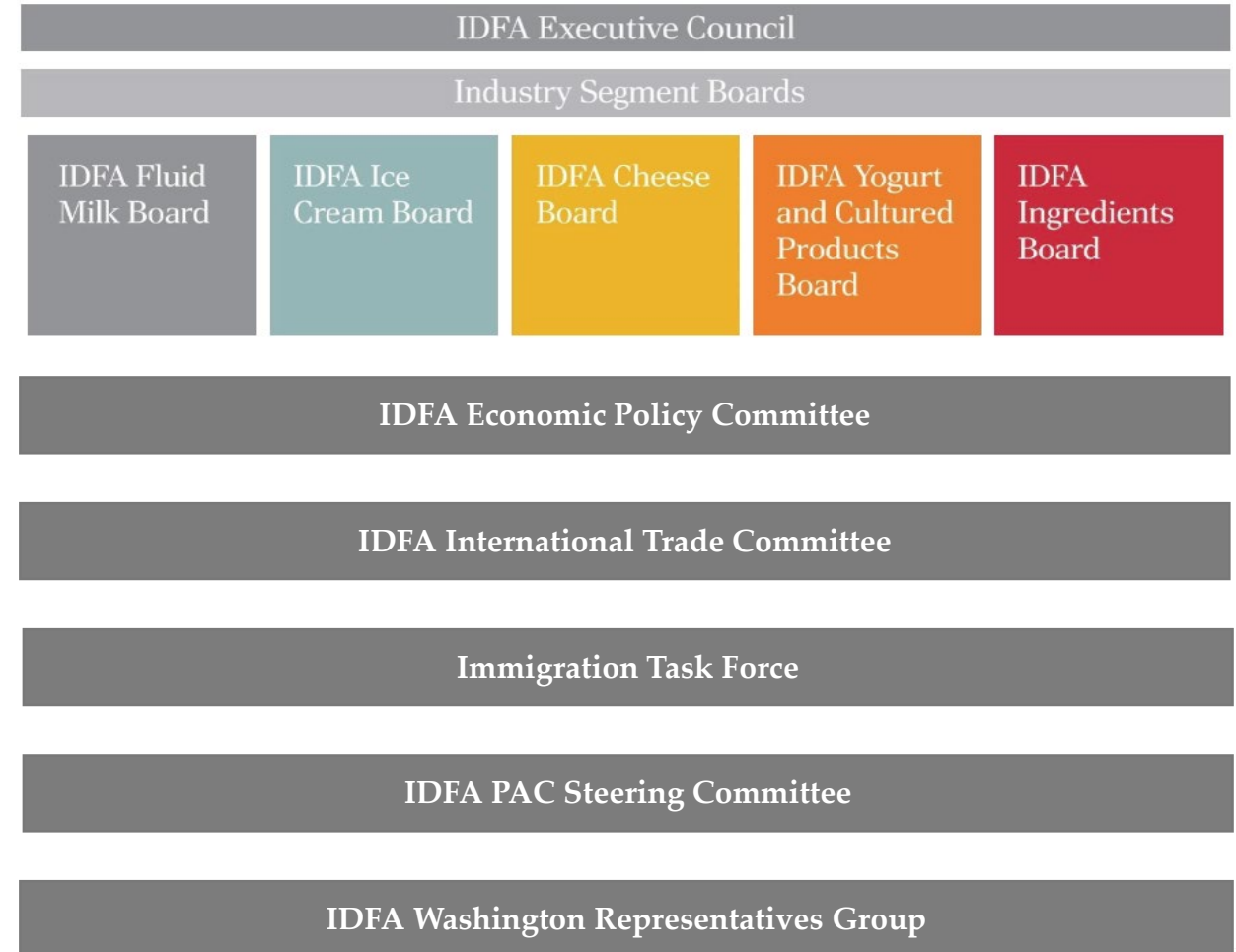
A = High priority  
 B = Moderate priority  
 C = Lower priority

Issue Area	Status	Goals	Specific Actions	Priority <u>M C I C Y I</u>
<p><b>IMPLEMENTATION OF THE 2018 FARM BILL</b></p>	<p>The 2018 farm bill (the Agriculture Improvement Act of 2018) was signed into law on December 20, 2018.</p> <p>USDA is currently working to implement the law. Deputy Secretary <u>Censky</u> is leading this effort, which includes officials from the Office of the Secretary, the Office of Budget and Program Analysis, the Office of General Counsel and each of USDA’s mission areas. The Office of Management and Budget (OMB) will also review major regulatory changes required in the legislation.</p>	<p>Implement farm bill provisions that would extend the current Dairy Forward Pricing Program for Classes II, III &amp; IV;</p> <p>Change the Class I mover from the higher of Class III &amp; IV to the simple average of Class III &amp; IV, with a \$0.74 adjustor;</p> <p>Create a milk purchase incentive program in SNAP; and</p> <p>Improve risk management tools available to dairy producers (the new Dairy Margin Coverage Program)</p>	<p>Pursuant to a final rule issued on March 1, 2019, the Dairy Forward Pricing Program has been reinstated and will remain in effect until September 30, 2023.</p> <p>Similarly, a final rule implementing the Class I mover change was issued on March 11, 2019. The mover change effective date will be May 1, 2019 - the effective date specified in the statute. This will provide all market participants with time to adjust their formula calculations before the mover changes go into effect.</p> <p>IDFA is working with staff in the Food, Nutrition and Consumer Services mission area to stand up the new SNAP milk incentive program.</p>	<p><u>A</u> <u>A</u> <u>A</u> <u>A</u> <u>A</u></p>

# Legislative Committee Restructure



- Reorganize committees and ad hoc task forces based on horizontal approach by issue rather than product category
- MIF/IICA and NCI Economic Policy committees have been replaced by one economic policy committee





# Farm Bill Implementation

*Dave Carlin*



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# Dairy Forward Pricing Program

- Lapsed on September 30, 2018
- Status: Program “restarted” on **March 4, 2019**



Change the Class I mover from the higher of Class III and Class IV to the simple average of Class III and Class IV plus a \$0.74 adjustor

- **Status: Final rule published on March 11. The change will be effective on **May 1, 2019****





- New Program-will require appropriations in FY2020
- Status: Food and Nutrition Service (FNS) will develop program parameters





# Appropriations

*Tony Eberhard*



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# IDFA FY2019 Appropriations Wins



## Victories:

- ✓ \$1.5 million for Agricultural Research Service (ARS) ice cream waste solutions.
- ✓ \$2 million increase in funding for FDA's Office of Nutrition and Food Labeling for SOI regulations.

Status: The FY2019 Consolidated Appropriations Act included both IDFA priorities and was signed into law February 15, 2019.

# Ice Cream Appropriations \$1.5 Million



## House

Rep. Mark Pocan (D-WI)

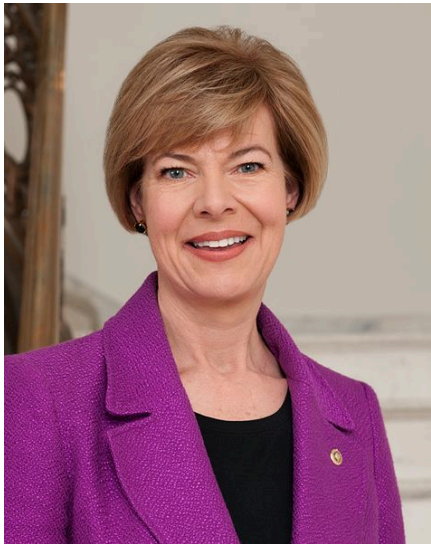
Rep. Dutch Ruppersberger (D-MD)

## Senate

Senator Jerry Moran (R-KS)

Senator Tammy Baldwin (D-WI)

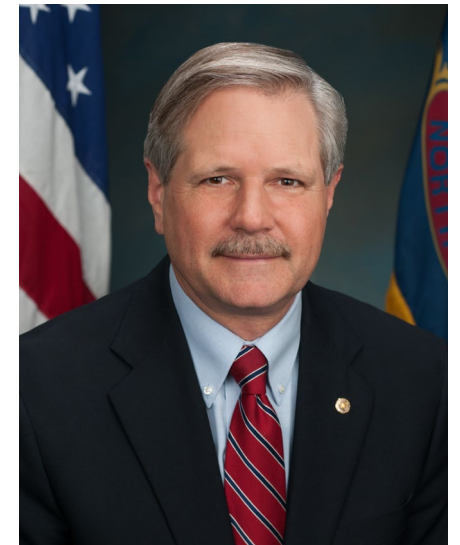
Senator John Hoeven (R-ND)



Sen. Tammy Baldwin (D-WI)



Rep. Mark Pocan (D-WI)  
and Schoep's Ice Cream



Sen. John Hoeven (R-ND)

# FDA Funding \$2 Million

## House

**Rep. Mike Simpson (R-ID-02)**

**Rep. Pete Aguilar (D-CA-31)**

## Senate

**Senator Roy Blunt (R-MO)**

**Senator John Hoeven (R-ND)**

**2% Nutrition**

**\$1 Billion  
FDA Food  
Safety &  
Nutrition  
Funding**



- ✓ Successful February Legislative Fly In
- ✓ Build on last year's success with Ice Cream & FDA Funding

## Additional appropriations requests:

1. NEW SNAP Milk Incentive Program
2. GIs Prioritization at USTR
3. Greater U.S. Presence at FAO





# School Milk

*Tony Eberhard*



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# 1% Low Fat Flavored Milk Back in Schools



## Final Rule “Child Nutrition Program Flexibilities for Milk, Whole Grains, and Sodium Requirements”

- Effective February 2019, permanently allows schools to serve 1% low-fat flavored milk.

*“USDA is committed to serving meals to kids that are both nutritious and satisfying... we continue to listen to schools... to ensure they can meet the needs of their students based on real-world experience.”*

– Secretary Perdue



# School Milk Bills Introduced in 116<sup>th</sup> Congress

Representatives Joe Courtney (D-CT) and G. T. Thompson (R-PA) working on bi-partisan legislation to codify the dairy portion of the Final Rule

Representatives Thompson and Representative Collin Peterson (D-MN) introduced the “Whole Milk for Healthy Kids Act of 2019” (H.R. 832)



# House Education & Labor Committee



Bobby Scott (D-VA)



Virginia Foxx (R-NC)



Joe Courtney (D-CT)



G.T. Thompson (R-PA)

“The nutrition standards enacted after the 2010 bipartisan reauthorization are working. Around 99 percent of all schools are meeting the standards. Kids are eating better foods. Studies show that kids are eating up to 16 percent more vegetables and 23 percent more fruit at lunch.”

Cong. Bobby Scott (2016)

“Milk is the No. 1 source of nine essential nutrients in the diets of our students, but if they don’t drink it these health benefits are lost. Milk consumption has been declining in schools throughout the nation because kids are not consuming the varieties of milk being made available to them.”

Cong. G.T. Thompson (2019)

# Senate Agriculture Committee



If we can put politics aside, under this model of regular order, there is a pathway for child nutrition programs to be reauthorized yet this year. Secretary Perdue and the Department of Agriculture have provided the much-needed flexibility to ensure that all of you in this room can make decisions to enable schools to serve nutritious meals that children will find appetizing. That is really what these programs are about: serving meals to hungry children so that they can learn and grow.

**Sen. Pat Roberts (R-KS)**



# Trade Update

*Beth Hughes*

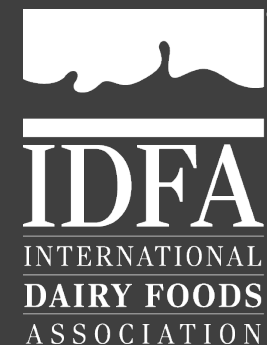


- USMCA passage
- Lifting tariffs – 232 & 301
- Free Trade Agreements with Japan, EU, & UK
- WTO Reform



U.S.-  
Canada-  
Mexico  
Agreement  
(USMCA)

*Beth Hughes*



## Trade Promotion Authority

Aug. 31 – Congress notified of intent to sign agreement

Sept. 30 – Release of text to public

Nov. 30 – Partners sign agreement

Jan. 29 – Report on required changes to U.S. law sent to Congress

Apr. 19 – Int'l Trade Commission report required

Summer/Fall – Congressional consideration & implementation





# Tariffs

*Beth Hughes*



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# Section 232 – Aluminum & Steel

- 8 months since Mexico & Canada retaliated
- Possible Mexico will overhaul retaliation list; add more dairy?
- Quotas on steel and aluminum imports
- Canadian federal election in October
  
- Unclear if U.S., Mexico & Canada are discussing a resolution
- USTR worried 232 linked to USMCA passage



# Section 301 – China IP practices & policies

- December 1 – freeze tariffs for 90 days
- Several U.S.-China meetings
  - China buys U.S. soybeans
- March 1 deadline delayed “until further notice”
- President Trump & President Xi meeting?
- Progress being made but no details





# Bilateral Trade Agreements

*Beth Hughes*



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# U.S.-EU Free Trade Agreement

- Submitted comments to USTR on Dec. 10
- Agriculture **MUST** be included
- Increase market access across all dairy tariff lines
- Eliminate tariffs
- Eliminate regulatory burdens
- Strong SPS measures
- Protect the use of common cheese names



# U.S.-Japan Free Trade Agreement

- Submitted comments to USTR on Nov. 26
- Better market access than TPP across all dairy tariff lines
- Eliminate tariffs
- Eliminate ALIC from the administration of any new quotas
- Strong SPS measures
- Protect the use of common cheese names



# U.S.-UK Free Trade Agreement

- Brexit
- Submitted comments to USTR on Jan. 15
- Increase market access across all dairy tariff lines
- Eliminate tariffs
- Strong SPS measures
- Protect the use of common cheese names





# World Trade Organization (WTO)

*Beth Hughes*



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## Function of the WTO:

- monitors member states' trade policies
- provides a forum to negotiate new trade agreements
- arbitrates trade disputes

## U.S. calling for major reforms including:

- Non-market economy - China
- Transparency - subsidy notifications
- Developing country status - China, S. Korea, etc.
- Appellate Body – going beyond mandate





- Most pressing issue is the WTO's Appellate Body
  - Oversees trade dispute settlement process
  - U.S. blocking judge appointments as leverage
  - Out of 7 judges, 3 remain
  - 3 judges required to make a determination
  - Terms of 2 judges expiring in December
  - After December, dispute settlement will no longer function
- USTR Robert Lighthizer testified before Senate Finance Comm.
  - Defended U.S. actions but did not call for withdrawal from WTO...yet



# Natural Cheese

*Dave Carlin*



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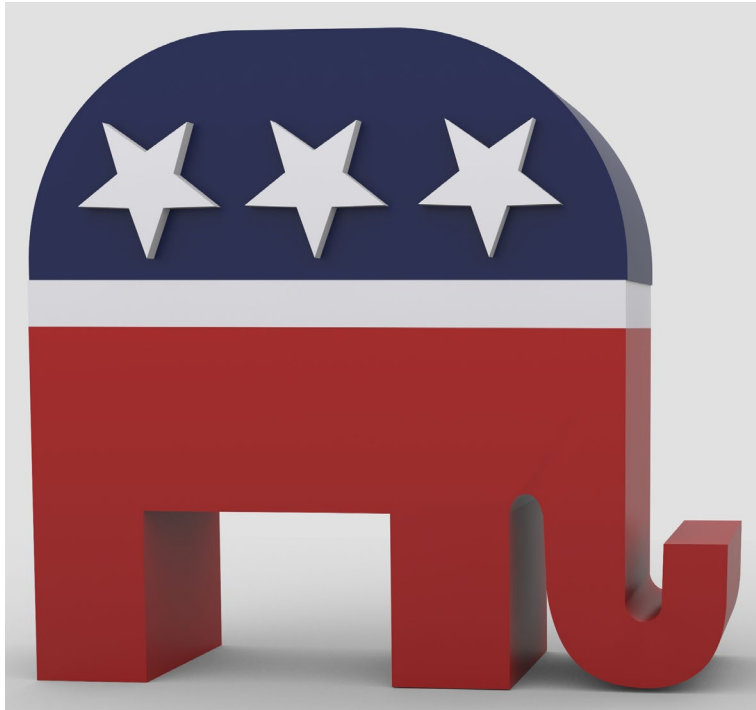
- Senate passed CURD Act by voice vote in December
- House voted in favor of CURD Act (230-162) but it failed on suspension (2/3<sup>rd</sup> vote requirement) and a re-vote was not scheduled before adjournment



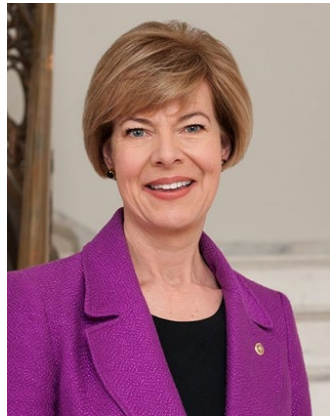
# Republican Senate

# Democratic House

*\*Rep. Frank Pallone chairs Energy & Commerce Committee*



# Bipartisan Support Remains Strong



**Sen. Tammy Baldwin**  
(D-WI)



**Senator Ron Johnson**  
(R-WI)



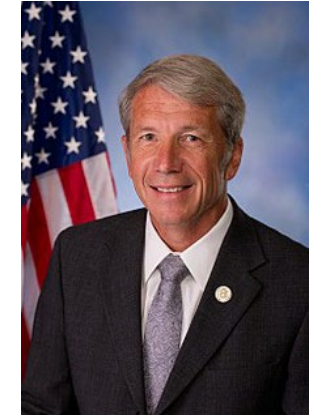
**Senator Ron Wyden**  
(D-OR)



**Rep. Billy Long**  
(R-MO-7)



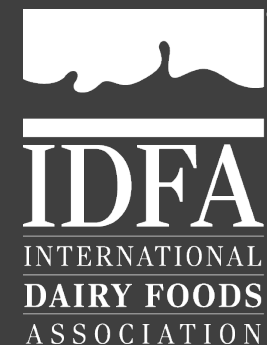
**Rep. Ron Kind**  
(D-WI-3)



**Rep. Kurt Schrader**  
(D-OR-5)



IDFA PAC  
&  
Grassroots  
Report  
*Colin Newman*





# IDFA PAC & Grassroots Report

March 26, 2019  
Chicago, IL

# IDFA PAC & Grassroots Report

- IDFA (Political Action Committee) PAC
- Washington Strategic Fly-Ins
- Legislative Fly-Outs
- Congressional Facility Tours



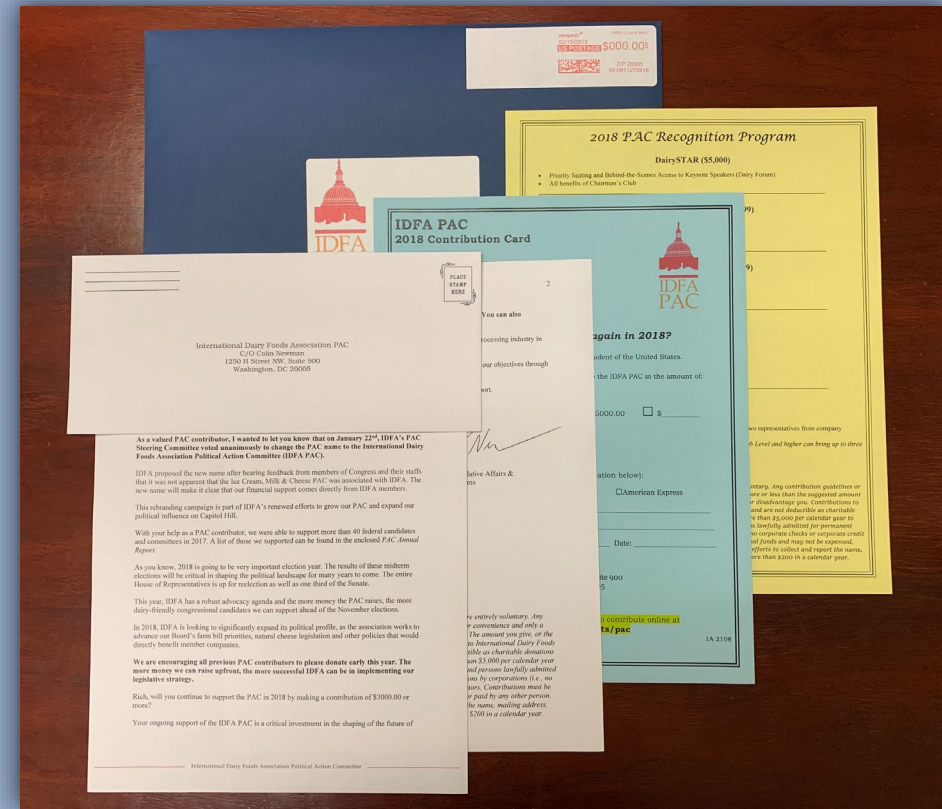


# IDFA Political Action Committee (PAC)


- In the 2018 Election Cycle, IDFA PAC disbursed \$236,000.00. Raised an additional \$139,000.00.
- 2017-2018 Political Footprint - **\$375,000.00**
- In 2019, we plan to disburse \$180,000 to 49 candidates and Host 6 IDFA PAC fundraisers.

# IDFA Political Action Committee (PAC)

- Our PAC fundraising goal for 2019 is **\$200,000**. We have raised \$30,000.
- New Money To Find - **\$170,000**
- Historically **75%** of IDFA PAC contributions are collected in **April-May**
- 2019 PAC Mailing



# IDFA Political Action Committee (PAC)

 **International Dairy Foods Association PAC**  
Prior Approval Form

**Why do we need your approval?**  
Federal election law requires corporate trade associations such as IDFA to obtain the "prior approval" of its corporate members prior to conducting a solicitation on behalf of the trade association's political action committee. Please complete the form below so we can provide you with more information about the IDFA PAC.

**Company Authorization**  
On behalf of \_\_\_\_\_, a corporate member of the International Dairy Foods Association, I hereby authorize solicitation by the IDFA PAC as indicated below.

I understand that our company may give this authorization to only one trade association PAC per calendar year. To the best of my knowledge, no such approval has been given to any other trade association PAC for the year(s) indicated below.

I authorize the IDFA PAC to solicit and otherwise communicate about the PAC with:

- The attached list of executives, stockholders and administrative personnel. (IDFA will only contact those designated by your company.)
- Please limit to myself.

IDFA corporate members may authorize prior approval for multiple years. This option helps to streamline the annual PAC solicitation process. At any time, a company may withdraw its authorization by contacting the IDFA PAC. We will never contact anyone at your company without your approval.

Please complete the form below and sign your name next to each year you wish to grant prior approval.

Name: \_\_\_\_\_  
Title: \_\_\_\_\_

2019: \_\_\_\_\_ (Full Signature)      2020: \_\_\_\_\_ (Full Signature)  
2021: \_\_\_\_\_ (Full Signature)      2022: \_\_\_\_\_ (Full Signature)  
2023: \_\_\_\_\_ (Full Signature)

Return to: IDFA PAC  
International Dairy Foods Association  
1250 H Street, NW, Suite 900, Washington, DC 20005  
Phone: 202-737-4332 Fax: 202-331-7820  
E-mail: pac@idfa.org

1

The IDFA PAC is funded **100%** by voluntary individual contributions

Unlike IDFA's other advocacy efforts, the PAC can not be funded through the support of corporate accounts or membership dues.

**Please sign PAC Prior-Approval**

# Grassroots



Washington Strategic Fly-Ins



Legislative Fly-Outs



Congressional Facility Tours



New Member Meet & Greet s



Capitol Hill Events

# Looking Forward - 2019



## 2019 Goals

6 PAC Fundraisers

4 Strategic Fly-Ins

2 Legislative Fly-Outs

6 Congressional Facility Tours

# Looking Forward - 2019



## 2019 Upcoming Events

South Dakota Fly-Out  
April 24, 2019

June Strategic Fly-In and Capitol Hill Ice Cream Party  
June 18-19, 2019

September Strategic Fly-In  
September 24-25, 2019 (Tentative)

December Strategic Fly-In and Celebration of Dairy  
December 5-6, 2019

*\*Things change frequently in Washington. Please note that this schedule may be modified*





# NextGen Dairy Leadership Program

*Colin Newman*



**IDFA**

INTERNATIONAL  
DAIRY FOODS  
ASSOCIATION





# NextGen Dairy Leadership Program

March 26, 2019  
Chicago, IL

# Next Gen Leadership

**65%** of children now entering primary school will hold jobs that don't currently exist.

By **2050**, **2.2** billion people will be added to the global population.

By **2025** online grocery sales will capture **20%** of total grocery retail and reach **\$100 billion** in consumer sales



# Program Goals



Advocacy



Education



Networking

The program is built around three core development areas

# Next Steps

April – Formal rollout of program

May – Candidate applications due

June – 2019-2020 leadership class selected

August – Washington D.C. advocacy &  
leadership program



IDFA NextGen  
Leadership Program  
Coming Summer 2019



# ProFood Tech





**IDFA**

INTERNATIONAL  
DAIRY FOODS  
ASSOCIATION

**Welcome**



MAKING A DIFFERENCE FOR DAIRY

# Welcome

**ProFood**<sup>TM</sup>  
**Tech**

THE Processing Event for Food & Beverage  
MARCH 26-28, 2019 | CHICAGO, ILLINOIS USA

Powered by



MAKING A DIFFERENCE FOR DAIRY



# By the Numbers:

414  
exhibitors

Nearly  
106,000 net square  
feet of exhibit space

Currently at over  
3,600 registrants



THE Processing Event for Food & Beverage  
MARCH 26-28, 2019 | CHICAGO, ILLINOIS USA



MAKING A DIFFERENCE FOR DAIRY

# Current Floor Plan



THE Processing Event for Food & Beverage  
MARCH 26-28, 2019 | CHICAGO, ILLINOIS USA

Powered by



MAKING A DIFFERENCE FOR DAIRY

# West Concourse



- Registration – Exhibitor and Attendee
- PMMI Information Booth
- IDFA Booth
- Koelnmesse Booth
- IMPACT Zone
- My Show Planner Kiosk
- Information Desk
- Opening Reception



THE Processing Event for Food & Beverage  
MARCH 26–28, 2019 | CHICAGO, ILLINOIS USA



# International Sales



## Status

- 85 international exhibitors from 21 countries outside of NAFTA
- 11,760 net square feet of space
- Largest participating countries are:
  - India: 3,000 square feet
  - Italy: 2,100 square feet
  - Germany: 1,125 square feet
  - Denmark: 700 square feet
  - UK: 700 square feet

## Sample of International Exhibitors

- ALPMA
- Galdi Srl
- Loedige Process Technology
- Sudpack Verpackungen Gmbh
- Synerlink
- TAVIL
- Tecnopool Spa
- Thimonnier



THE Processing Event for Food & Beverage  
MARCH 26–28, 2019 | CHICAGO, ILLINOIS USA



# International Sales



- Four official International Pavilions:
  - China: 4 exhibitors
  - France: 6 exhibitors
  - India: 38 exhibitors
  - Taiwan: 6 exhibitors
- Total share of international exhibitors is 23% compared to 20% in PFT-2017



THE Processing Event for Food & Beverage  
MARCH 26–28, 2019 | CHICAGO, ILLINOIS USA



# Current Numbers



**Tracking ahead of 2017: 3,462 registrants** compared to 3,062 registrants 1 week out in 2017.

**New Leads:** We have 2,950 attendees who have registered for PFT 2019 who did not attend the inaugural event.

**Senior Job Functions:** We have over 340 more CEO/General Manager/Other Senior Management job functions than this period during 2017.

**Decision Makers:** 74.4% of attendees have final decision making or significant influence purchasing authority. We have over 550 more registrants in this important segment than this period last year.

**Next Generation of Food Processing Professionals** - Over 19% of attendees are under the age of 34.



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# ProFood Tech 2019

Educational Programming: Knowledge Hub



MAKING A DIFFERENCE FOR DAIRY

# Educational Programming



## IDFA's Knowledge Hub



IDFA's educational programming for 2019 reflects what we learned from ProFood Tech 2017 attendees and exhibitors:

- Free of charge to all attendees
- Interactive and fast-paced
- Held in three venues located on the show floor



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MAKING A DIFFERENCE FOR DAIRY



# Educational Programming



## **INNOVATION** zone

- Feature breakthrough ideas and formulations that will spark your creativity.
- Use the expertise of our exhibitors to identify solutions to challenges and discover fresh opportunities.



## **DISRUPTION** zone

- Focus on identifying and implementing disruptive technologies to meet consumer demands.



## **IMPACT** zone

- Foster interactive discussions led by moderators where attendees can learn from each other's experiences, successes and – yes – failures.

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# Educational Programming



What Industry 4.0 Means for Your Business  
*Tetra Pak*

More Than 3D Vision – Continuous Cut Optimization  
*Letico*

Top Ten Trends for 2019  
*Innova Market Insights*

Inline Tray Forming Reduces Material Costs Up to 38%  
*Harpak-ULMA*

Adding Retail Operation Efficiency with One-Touch,  
Retail-Ready Bulk Merchandising Solutions  
*Orbis Corporation*

Faster and Reliable Quality Results Mean Increased Business  
Productivity  
*BioMerieux*

Food Security and the FBI  
*Federal Bureau of Investigation*

The Application of Sanitary Design Principles in Food Processing  
Equipment  
*Deville Technologies Inc.*

Path to Operational Excellence for the Dairy Sector  
*Emerson*

Cybersecurity & The Industrial Environment: Best Practices to  
Breach Response  
*OpX*



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# Issues Briefing

for Members of the  
IDFA Executive Council &  
Industry Segment Boards



**IDFA**

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DAIRY FOODS  
ASSOCIATION