# Dairy Day Industry Seminar 2018

Consumer Education Project of Milk SA

Presenters:

Christine Leighton: Project coordinator of the Project

Maretha Vermaak: Dietitian of the Project



#### Communicating the nutritional and health benefits of dairy

www.rediscoverdairy.co.za www.dairygivesyougo.co.za

#### REDISCOVER THE GOODNESS OF DAIRY

"Our industry has a responsibility to produce value for money, safe, innovative and tasty products, that are good for the consumer and contribute to their wellbeing, and in this way, grow volume, become a food of choice, create employment and become an industry to be admired "

Quote from the SASDT conference (April 2018) by Mr Geoffrey Grant, IMCD

# Milk and dairy products in human nutrition

http://www.fao.org/docrep/018/i3396e/i3396e.pdf

- *"Billions of people around the world consume milk and dairy products every day.*
- Milk and dairy products a vital source of nutrition for the population of the world
- Consumers, **industry** and governments need up-to-date information on how milk and dairy products can contribute to human nutrition and how dairying and dairy-industry development can best contribute to increasing food security and alleviating poverty. "



# Aim of the presentation

This presentation will demonstrate

- That dairy plays an important role in diet of all South Africans
- New opportunities exist to inform consumers on milk and other dairy products as healthy and nutritious foods.

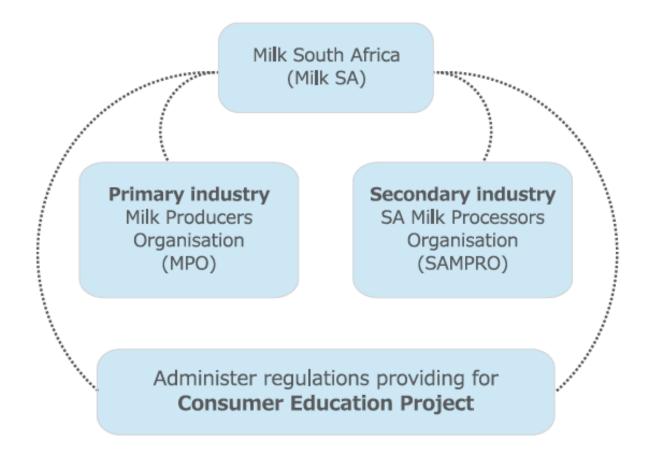


### Presentation outline

- South African dairy industry overview
- Challenges
- Opportunities
- Educating you consumer









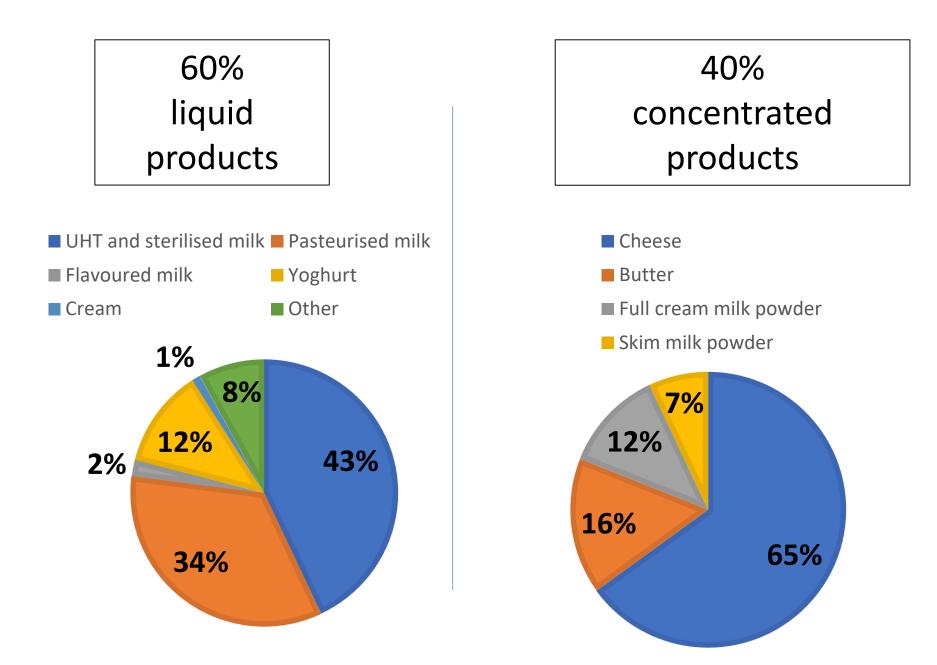


### Overview of South African dairy industry Primary Sector



Avg: 20L/cow/day

Source: Lacto data



### Market situation

		March 2017		
	YEARApril 2016toMarch 2017March 2017	March 2018		
PRODUCTS	CHANGE IN DEMAND/ SALES QTYs	CHANGE IN RETAIL PRICES		
Fresh milk	-3.8	0.3		
Long life milk (UHT)	11.3	-1.5		
Flavoured milk	-1.2	3.9		
Yoghurt	-0.9	5.6		
Maas	6.7	-0.1		
Pre-packed cheese	8.3	2.1		
Cream cheese	-8.2	5.9		
Butter	-6.5	31.8		
Cream	-0.4	11.1		

### Global market trends DRIVERS of consumption

#### Macro-economic

- Increasing prosperity and affordability
- A rising middle class in emerging market
- Millennials are shifting into a higher purchasing power age bracket
- Growth of aging population
- Urbanisation
- Globalisation, connectedness and mobility

#### Consumers

- Health and wellness based on global obesity concerns
- Wealthy consumers are willing to pay more
- Disadvantaged consumers managing limited budget
- Growing awareness and concern over sustainability
- Place of origin; localisation and ethical integrity



### Key consumer TRENDS

#### **Consumption habits**

- Meal replacement and snacking, change in portion size
- Transformation of packaging and labelling
- Personalised nutrition instead of medication

#### **Consumer preferences**

- Natural sources of origins
- Rise of sophisticated global flavours
- Low or no added sugar
- Low and no calories
- Functionality



# How do we ensure that dairy remains relevant?

# challenges





By making dairy a real part of the diet of our people.

- We need to claim the conversation about dairy
- Bring the discussions back to dairy and remind the consumer of the goodness of dairy

### Health related challenges

Health and wellness based on global obesity concerns



An abundance of food and beverage choices complicates healthy eating





# The risk of disease and dietary patterns

The role of dietary risk factors in noncommunicable diseases (NCDs) is now well recognised.



# The consumer is confused

### How do consumers make decisions?

#### Local news

#### WATCH: Do dairy products trigger your sinusitis?

Milk and cheese could be aggravating your sinus condition.

June 10, 2018

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### FOODS AND DRINKS TIPS

#### Home

Home » »Unlabelled » Set of Superfoods for Unwanted weight Loss

#### Set of Superfoods for Unwanted weight Loss

Publication: Men's Health Date: Sunday, July 01, 2018 Pape: 07

Foods which help lose weight

It's said that, "If everybody were free regard And yet alas, women will still be weight cons they promise effective fat loss (even if just o burning, that you can stuff standing on, with this is a list of superfoods you should gobble

Top Superfoods for the purpose of Weigl You have got many options from which to che are actually good should you desire for healt



het payou feelikult. That's one reason the authors of a 2017. Chinese readiwn bailweit many hel p reduce your risk of type 3 clabeles. Another plan. Yoghert's problektios (healthy bacturia) may banefit g lucosa regulation, a 2015 Mackette ne leer auggests. 10<sup>4</sup> Hantly with plain yoghart? A spoorful or two of raising, and some dask-choocitate

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▶ FOOD

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Change in eating habits, especially among the younger generation



The unstoppable rise of veganism: how a fringe movement went mainstream

Health, climate change, animal welfare... what's driving more people and brands to embrace a plant-based lifestyle? We investigate, and, below, four vegans explain their choice

by Dan Hancox

Flexitarian – try to eat fewer animal products but occasionally deviate and consume animal product

### Challenges due to information overload

# Shopping habits are changing

Millennials are changing tradition shopping habits. Crave an experience with their food.

Source: J of the academy of nutrition and dietetics 2015



# More servings of more information



Source:Ketchum, 2017 global food and nutrition prediction https://www.ketchum.com/ Top 10 Nutrition trends for 2016: Dairy Council California Non-credentialed experts that lead the conversation about nutrition is of a concern

Misperceptions about allergies and intolerances.

Lactose intolerance could be a barrier to dairy consumption and lead to avoidance of dairy.

### Here's how to tolerate lactose better

#### sip 🕧

Have small amounts at a time (125 ml or less). Build up your tolerance by starting small and gradually increase your milk consumption.

#### stir®

Use milk together with other foods, like milk with cereal or pap, rather than alone on an empty stomach.

#### slice

Cheeses like Cheddar and Gouda contain very little lactose and are generally well tolerated.

#### spoon

Yoghurt and maas have less lactose and are better tolerated than milk.

#### try 🔞

Full-cream milk may be better tolerated than low-fat or fat-free milk, or try lactose-free milk.











Consumer demand for sustainably-grown and locally sourced foods are increasing.

- Food choices are increasingly driven by factors beyond taste, cost and nutrition. Consumers believe that what they eat is a reflection of who they are.
- The rise of plant-based alternatives



Dairy alternatives are driven by consumer perception that 'dairy-free' is a healthier product than dairy





#### Feeling Your Oats: Coffee Gets Pretty With New Milk Alternative

## Price and taste are not incentives for consumers to leave dairy.

Concerns:

- Animal welfare
- Ethical values
- Sustainability
- Giving back
- Emotions

WEBMD HEALTH NEWS

### Food Fight: So, What Is 'Milk'?

By Kathleen Doheny



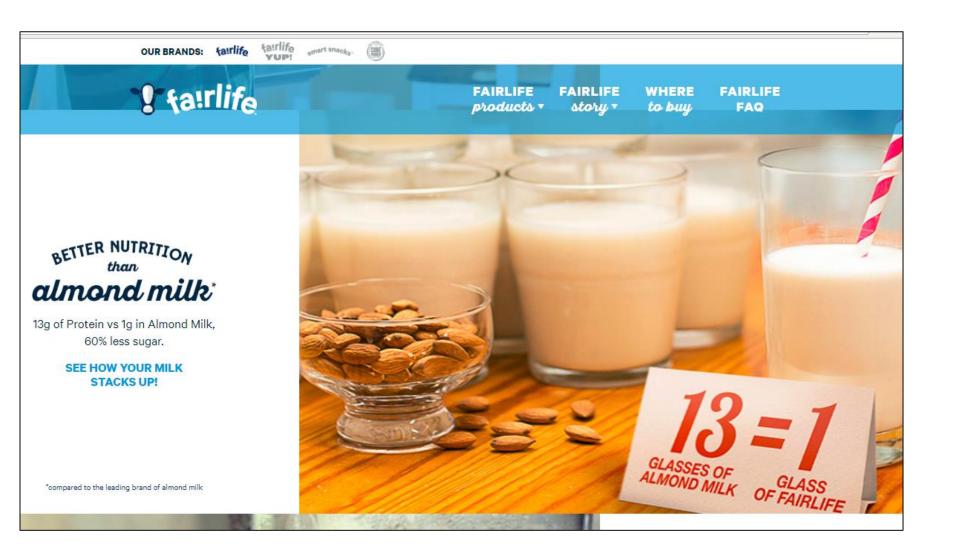
# Its not all creamy for dairy alternatives



food drink

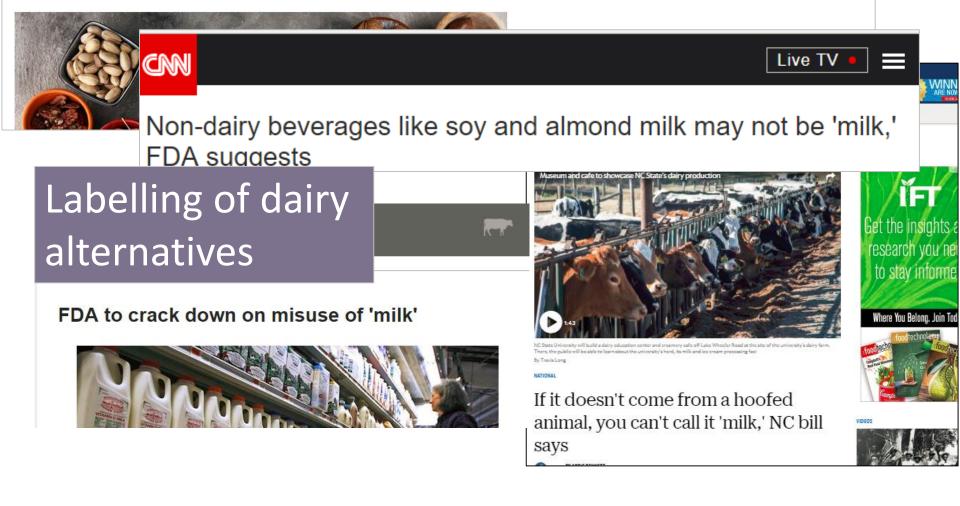
### What you need to know about drinking dairy alternative milks

NUT milks and other dairy-free options are hugely popular, but one expert says there's a major reas particular should be wary.



#### European dairy industry calls on bloc to get tough on 'misleading' labels

Three European trade bodies have issued a reminder to member states not to go soft on misleading practices.



### In South Africa the CEP is working with DSA to ensure labelling on dairy alternative products is controlled



#### agriculture, forestry & fisheries

Department: Agriculture, Forestry and Fisheries REPUBLIC OF SOUTH AFRICA

> Directorate Food Safety and Quality Assurance, Private Bag X343, Pretoria 0001 30 Hamilton Street, Pretoria

From: Division: Animal and Processed Plant Products Tel: (012) 319 6093 • Fax: (012) 319 6265 • e-mail: ThabangK@daff.gov.za Enquiries: Ms. Thabang Rampa • Ref: 20.4.11.1.5/ Dairy and Imitation Dairy Products

13 June 2018

Managing Director Dairy Standard Agency Att: Mr. Jompie Burger

E-Mail: jompie@dairystandard.co.za

Dear Mr. Bu	urger,
	USE OF DAIRY TERMS TO DESCRIBE IMITATION DAIRY PRODUCTS
1. Introduct	tion

### **Dairy Standard Agency**



The Dairy Standard Agency (DSA) is a registered non-profit company (NPC) in terms of the new Companies Act, 2008 (Act 71 of 2008). The primary objective of the DSA is the promotion of the compliance of milk and other dairy products with product composition, food safety and metrology standards.



### **Product challenges**

# Product

### reformulations

- low sugar content of dairy
- substitution of high value ingredients with less expensive ingredients
- reduction of high quality ingredients



Consumers do not understand the meaning claims and statements on packaging

### Watch what you are eating!

- Imitation dairy products
- Dairy vs dairy/yoghurt based snacks
- Hormone free/ rBST



### But there is hope.

# Opportunities





### Good news stories



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## How to up your child's dairy intake

June 1, 2018 | by Contributor





#### **HEALTH & SEX**

### 6 tips to con your milk-hating kid into eating more dairy

In honour of World Milk Day (who knew?), we share some pointers on sneaking some more calcium-rich dairy products into your child's diet

#### 5 nutritional benefits of milk for kids

Posted on June 1st, 2018

Dairy products are the main source of calcium in our diets, which is necessary for building healthy bones and teet World Milk Day we look at how you can include more dairy in your child's daily diet.

Save
 Save



ble.tv...

Get your audience Attention Know your audience

Millennials and Gen Z: Take dairy out of the kitchen and place it in the space of the teen and young adult



Millenials: Born 1980 Gen Z: Born 1995

## Talk to the MOMS! Serve Milk with every meal



Tell the your target audience the full story

**Emotional messages** 

**Rational messages** 

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# Show your target audience: where, why, how and what

Show your audience <u>where</u> dairy fits into the diet Show moms <u>why</u> young kids are at a crucial stage for milk's nutrients

Show <u>how</u> – milk can be part of meals, in a snack (smoothie), etc.

<u>Educate</u> the target audience on the differences between milk and milk alternatives.



Find new ways to engage with young consumers through product innovation

## New age `milk' fever has sales lessons for real dairy



Millenials value natural labels, enjoy cultural flavours and want transparency from food companies

### Industry/ innovation challenges

Fluid milk remained stagnant with limited innovations for many years

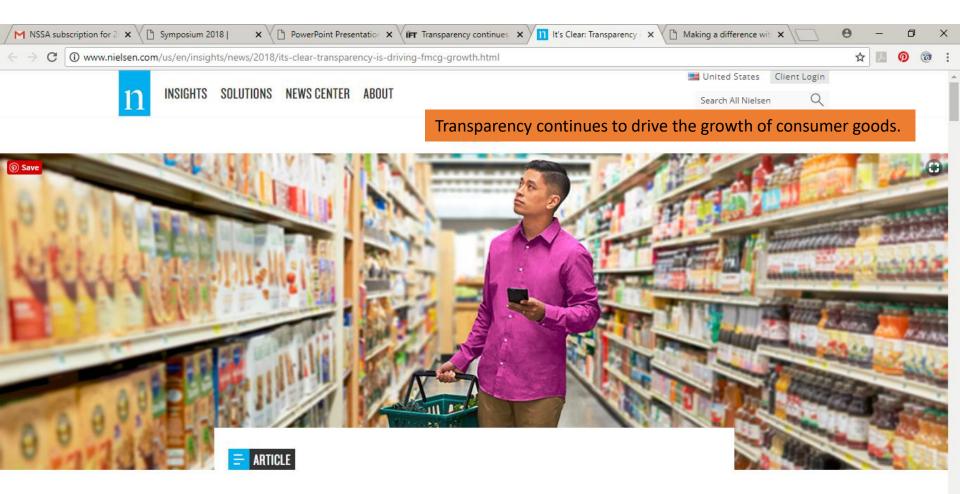




And, dairy companies are now becoming players in the alternative market

### FAIRLIFE story

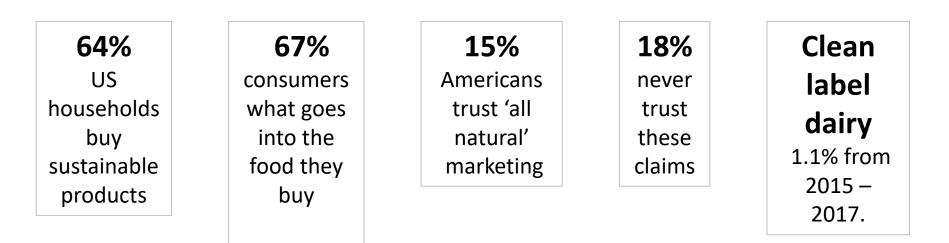




### IT'S CLEAR: TRANSPARENCY IS DRIVING FMCG

Transparency continues to drive consumer goods growth (IFT, June 2018)

- Consumers seek transparency in three key product attributes
  - Sustainability
  - Processing claims (organic/natural/free from etc)
  - Ingredients
- Nielsons product insider:



### To summarise :

## Key challenges

- Health and diet
- Dairy alternatives
- Consumer knowledge/scrutiny
- Sustainability

## **Key opportunities**

- Embracing technology
- Diversification/ learning from dairy alternatives
- Changing consumer habits



The way forward. Opportunities in health and nutrition



# Scientific research results provide new insights into dairy science and nutrition

www.rediscoverdairy.co.za

- Protein quality
- Saturated fats
- Iodine
- Dairy matrix
- Dairy and sport



## Protein is the nutrient of the decade

The quest for protein intensifies – protein continues to be the nutrient of the decade and its list of health benefits grows beyond muscle building to include satiety and weight management.





- The quality of milk protein has been found to be higher than previously acknowledged
- Functions of dairy protein involve more than only providing amino acids and nitrogen.
- Bioactive peptides in dairy has distinctive functions resulting in milk and dairy being classified as functional foods.

http://www.rediscoverdairy.co.za/dairy-based-nutrition-4/milk-protein/

# Milk protein: new insights into quality and function

The quality of milk protein is higher than previously estimated. Milk protein has more functions than previously known.

SUMMARY	
ilk protein consists of the major whey and case fractions, numerous minor bioactive peptides, a essential (indispensable) and non-essential (id pensable) amino acid building blocks. The tra tional anabolic functions of protein remain important, y recent research has identified additional metabolic and peut	nd lis- di- ret

**REVIEW 5 MARCH 2014** 

Table 1: Concentration and function of selected cows milk pro- teins (Pereita 2013; Severin & Wenshiu, 2005)					
Protein	Concentra- tion (g/L)	Functions			
Total caseins o-Casein	26.0 13.0	Mineral transport (Ca. PO4, Fe, Zn, Cu) and			

second and a set in second

## Renewed consumer enthusiasm for butter and dairy fats





## Pass the butter: Cutting saturated fat does not reduce heart disease risk, cardiologists say

Focus should instead be on eating 'real food,' walking and reducing stress CBC News Posted: Apr 25, 2017 6:59 PM ET | Last Updated: Apr 28, 2017 1:09 PM ET



OECD/FAO Agricultural outlook 2017-2026

## Dairy products may be heart healthy

- No conclusive evidence that milk or dairy food as a total group is associated with harm to health in terms of risk for coronary heart disease.
- Milk protein has been shown to improve the lipid profile and reduce cardiovascular risk factors
- http://www.rediscoverdairy.co.za/dairybasednutrition





Milk South Africa



### Dairy and cardiovascular disease

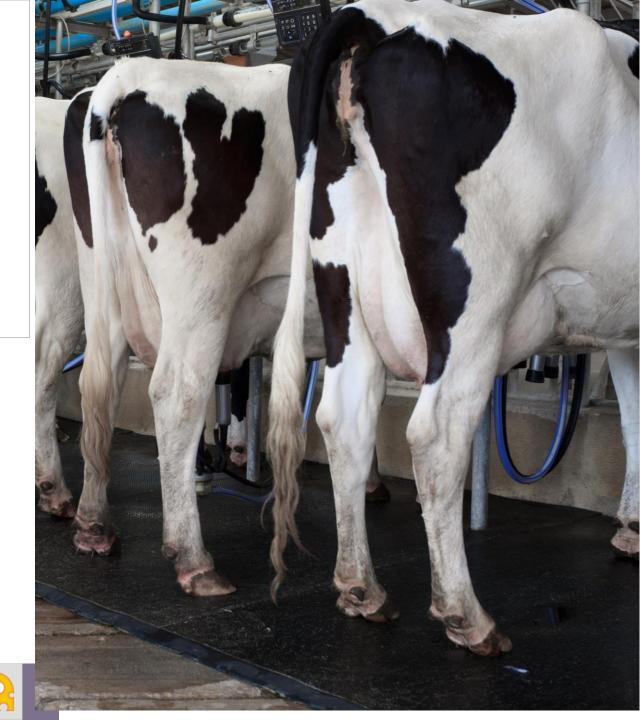
Cardiovascular disease (CVD) is the leading cause of death worldwide. In the USA, one in every three deaths were related to heart disease, stroke or other CVDs in 2014," According to the NHAMES 2011–2014 data, the prevalence of hypertension among US adults is 34%."

Food	Favourable outcomes			Neutral outcomes			es	Unfavourable outcomes				
	CVD	CAD	Stroke	HT	CVD	CAD	Stroke	HT	CVD	CAD	Stroke	HT
Total dairy			Х	Х	Х	Х						
Low-fat dairy			Х	Х	Х	Х						
High-fat dairy					Х	Х	Х	Х				
Medium-fat dairy						Х	X	Х				
Milk				Х		Х	Х					
Fermented dairy			X					Х				
Cheese			Х		Х	Х		Х				
Yoghurt					Х	Х	Х	Х				

### www.rediscoverdairy.co.za/nutritionwviews

## Iodine: The forgotten nutrient

Iodine deficiency remains a significant health problem worldwide and affects both industrialized and developing nations.



## Consumer education drives dairy consumption

### FUEL UP WITH FLAVOURED MLK

Milk and flavoured milk is the ideal beverage to

### drink after sport

#### Flavoured milk tastes great and helps with recovery.

### king a glass of milk or flavoured milk after exercise will help your body recover and get you ready for your next activity.

During training - whether at the gym or on the sports field -

your body uses energy to keep you going and your muscles burn protein. You also lose electrolytes through sweat. After training you need to replace the energy, protein and electrolytes your body has used,

### why dairy is good for you

#### Choose healthy!

Its and other daily products play an important rate in the well-teing of all South Africans as it supplies important nutritized benefits in a teely and satistying way every day!

Daily groducts provide a wide range of autrients which contributes to improving the quality of diets.
 The nutrients in daily products glay witat rule in combating mainutifion and contributes to reducing risk of non-communicable disease.



1 of dairy provides 300 mg of calcium

you need 1000 mg of calcium por day

#### Here are some of the important nutrients in dairy products:

Calcium gives strong bones and toeth Vitamin A is important for good eye sight and to fight sickness Vitamin Bizs is good for brain and memory function Potassium is good for your heart and muscles ON THE RUN? iether you are ning or looking a snack the run, youred milk

#### WHY MILK?

Milk and Sevoured milk, provides a unique combination of:

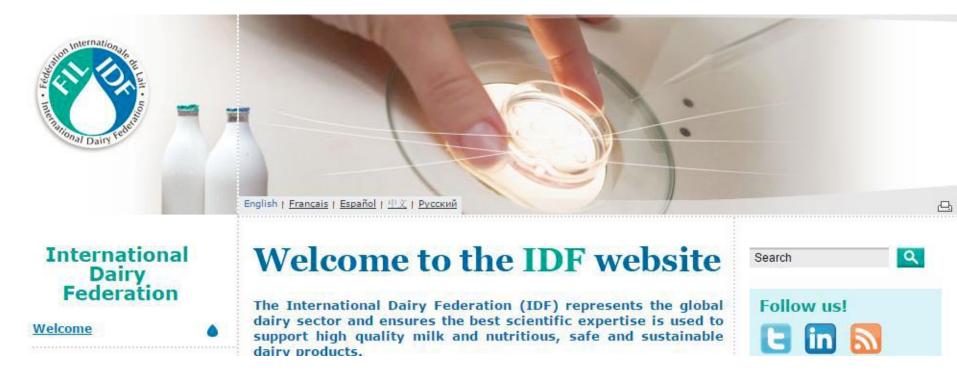
- Carbohydrates to boost energy, combat fatigue and REFUEL energy stores
- Fluid and electrolytes to help you REHYDRATE after training

#### PRACTICAL TIPS

- Most flavoured milk products can be stored out of the
- fridge and taken
- anywhere as they are long-life products.

## Global to local dairy industry

The International Dairy Federation (IDF) represents the global dairy sector. http://www.fil-idf.org



## Local: Consumer Education Project of Milk SA

- Communicates the health and nutritional benefits of dairy
- Agricultural Marketing Act

www.rediscoverdairy.co.za





## Agricultural Marketing Act Regulation 57

*"From a national point of view and to promote"* the viability of the dairy industry, consumers should be informed of the health and nutritional advantages of milk and other dairy **products.** Informed consumers will not only contribute to the national well-being in respect of nutrition and health, but especially also to the viability and sound development of the dairy industry. The education will be conducted in such a way that it **will not erode the marketing** activities of any firm in the dairy industry that are aimed at differentiating its products from that of competitors".



## Communication messages appeal to the consumers on a rational and emotional level.







## **Effective communication** demands choosing correct channels to talk to selected target audiences Y f

(Ô)

**O** 

- Television
- Social media
- Print media
- School learner engagement
- Websites
- Direct contact



## Consumer target audiences demand tailored messages

Teenagers	Low Income Consumers
Primary	Moms with
schools	children

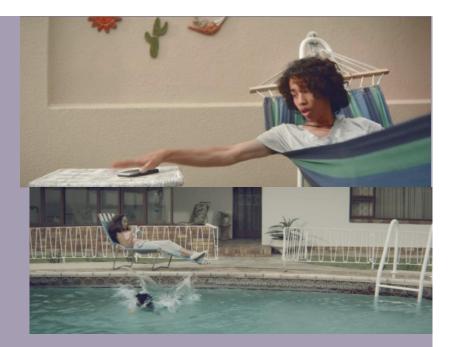
THE BENEFITS OF DAIRY **EVERYDAY** Dairy products are a source of calcium 3-A-DAY" is the recommended R Dairy helping for a healthy, balanced diet. It provides CARBOHYDRATES approximately 70% of the www.dairygivesyougo.co.za calcium you need daily JUST 01 (between 9 and 19 yrs) and ONE 90% if older than 19 to help 0 VITAMIN A GLASS build strong bones and teeth **f** dairygivesyougo POTASSIUM READ MORE

>

### Teenagers as target audience Television and social media messaging

www.Dairy gives you go.co.za

Sport	usic Fashion	Chill time
2014-2015	2015-2016	2016-2017
Dusty – athlete with no trophies Stix – the drummer that plays	Loretta Rush – Fashion model that 'just wants to go'	Hammock – Cell phone Pool – Dog wash Ball – Switch off the light
Take dairy out of the kitchen and place it in space of the teen		Go = Mental energy/vitality



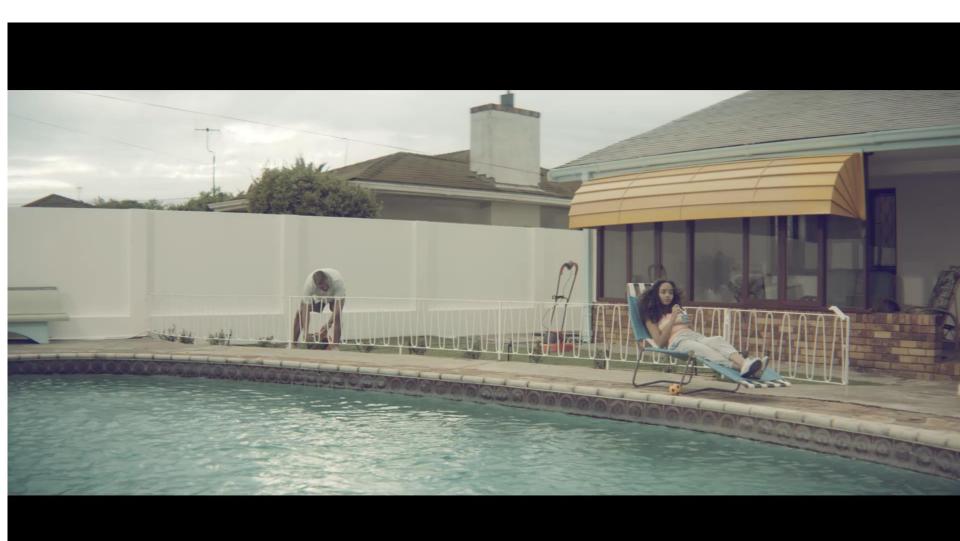
# Television and Social media





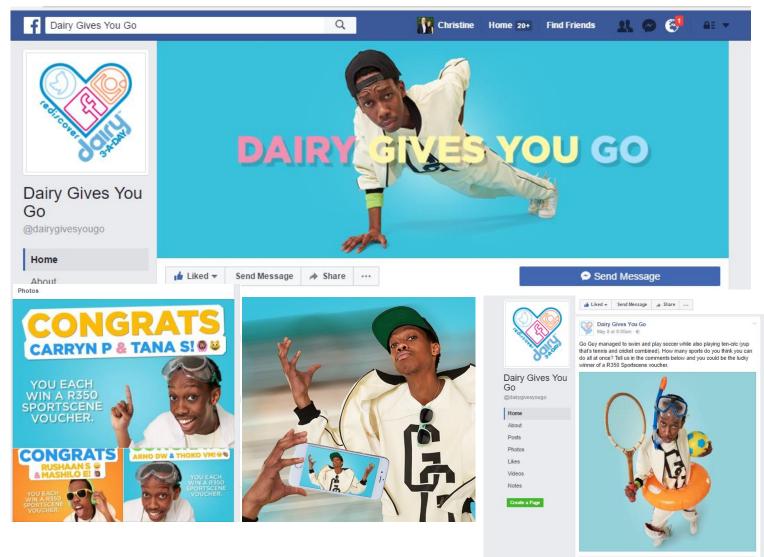






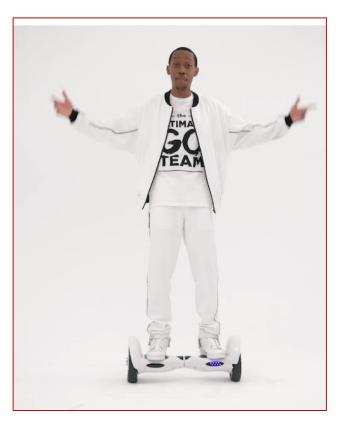


# Facebook: Go Guy engagement with the target audience



🖌 Like 📕 Comment 🔿 Share

# Go Guy: Dairy Go Team campaign (2017/18)





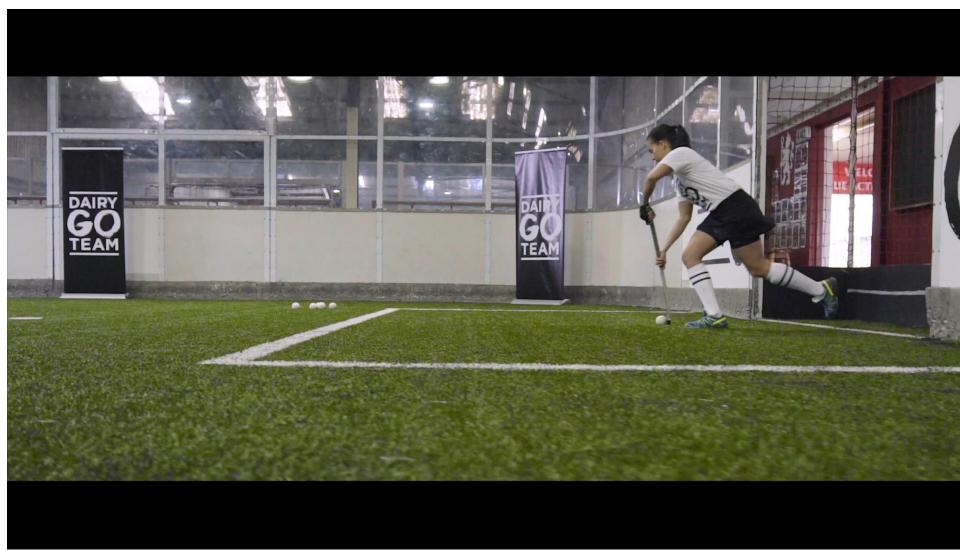


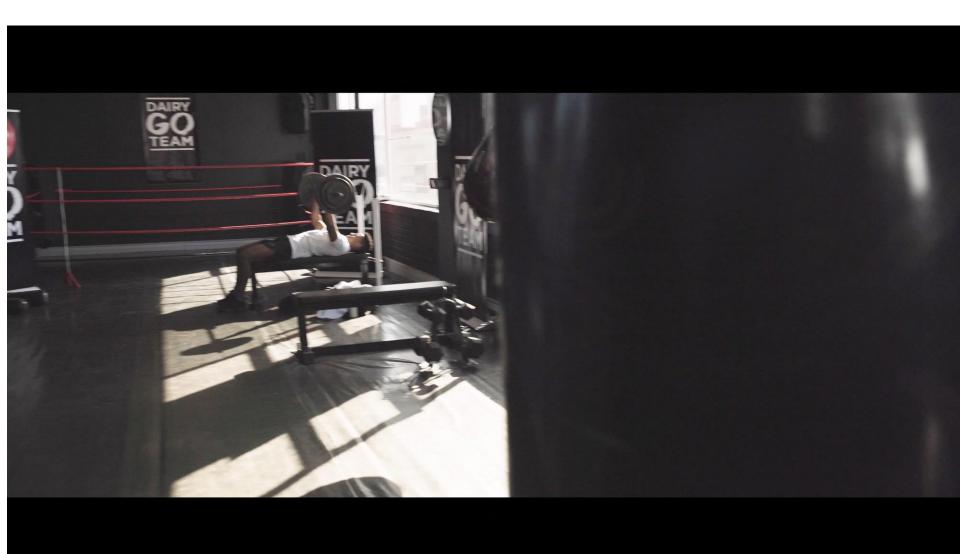
## DAIRY COO TEAM







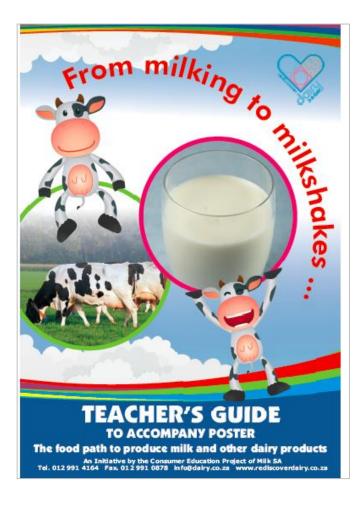




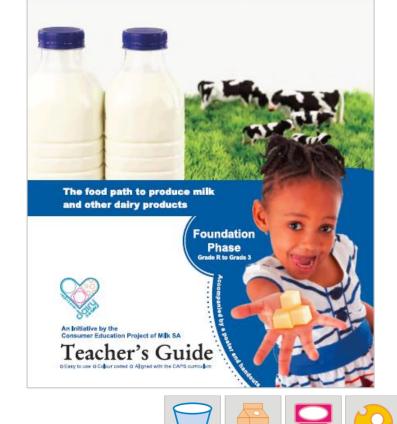
## Tasty treat videos to engage with consumers PEANUT BUTTER WHIP WITH APPLES

## CHOC BOOST PROTEIN SHAKE

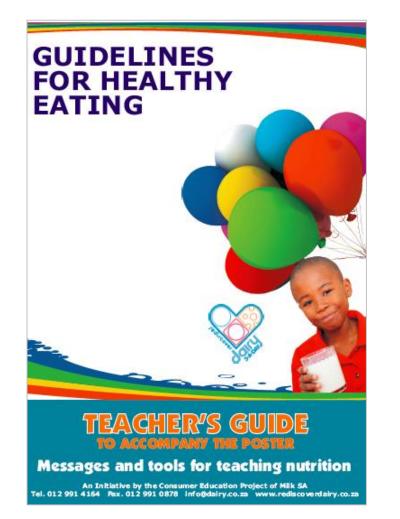
## Communication with Schools. Foundation Phase



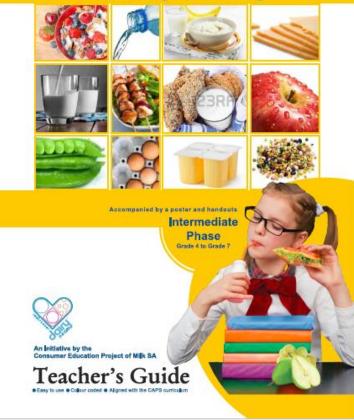
#### From farm to fridge Let's learn about dairy



## Intermediate phase



#### **Guidelines** for healthy eating





**Build lasting** relationships with the Health Professional community

Target audience: Dietitians, Nutritionists, Doctors, Nurses and health promoters

- Health Professionals enhances credibility of project and strengthens messages
- Influence consumers and encourage behaviour change by educating general public

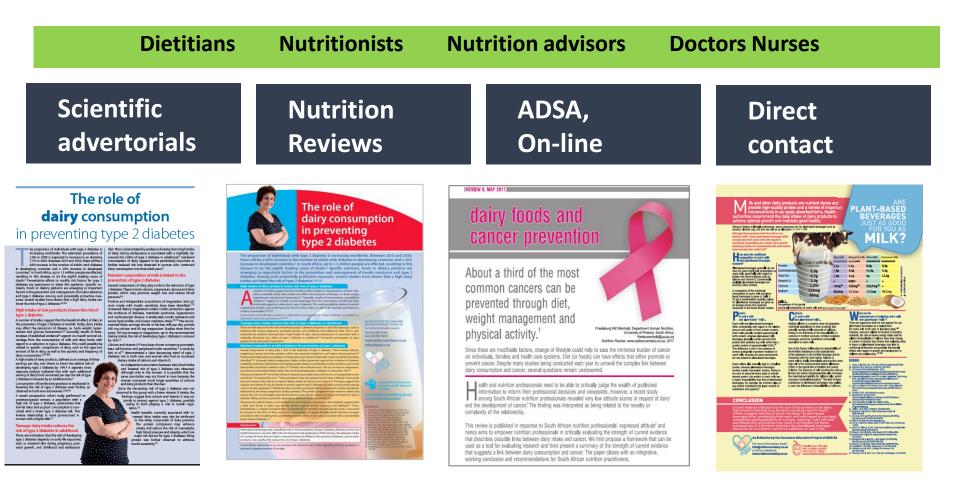


#### Communicating the nutritional and health benefits of dairy

www.rediscoverdairy.co.za www.dairygivesyougo.co.za

## www.rediscoverdairy.co.za

## Health professional target audiences



Science based information is communicated with health professionals

#### **Development of Nutrition reviews and advertorials**

#### The role of dairy consumption in preventing Type 2 Diabetes Mellitus



Diabetes Mellitus (DM) is considered one of the most common chronic diseases worldwide. The prevalence of DM (HbA1c > 6.5%) in South Africa is reported to be 9.6%, while 19% of the population has impaired glucose

Technical advisory committee

- Prof FriedeWenhold
- Dr Zelda White
- Dr Tuschka Reynders
- Prof Rene Blaauw
- Prof Corinne Walsh
- Nicki de Villiers
- Dr Ingrid van Heerden



More and more research evidence is showing that three servings of milk and/or dairy products a day, as part of a balanced diet, can play a role in preventing both prehypertension and stage 1 hypertension.<sup>14</sup> Dairy products contain a unique mixture of nutrients and bloactive components, which can act together or independently to promote health.

I ik and dairy products such as maas, yoghurt and cheeses, are integrated food systems that contain specific proteins, fats and carbohydrates that have beneficial physiological properties and also provide essential vitamins and minerals.<sup>3,13</sup>

The facts

The evidence

## Wellness project aimed to reach low-income consumers through training initiative

Empowering health promoters in government clinics to confidently advise people in the benefits of dairy: **"Have milk, maas and yoghurt every day"** 





#### Wellness project

#### Clinic and wellness project reach

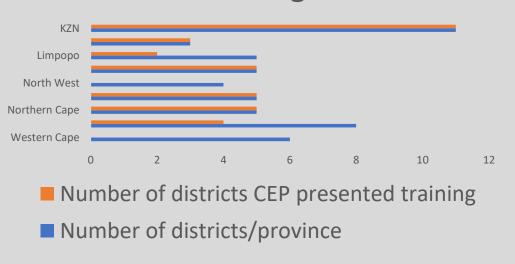
Nutrition advisors and Health promoters

- 67% of districts in SA
- 2465 total trained since 2014



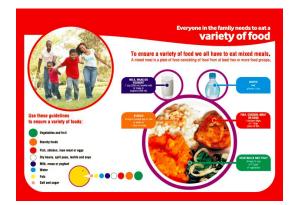


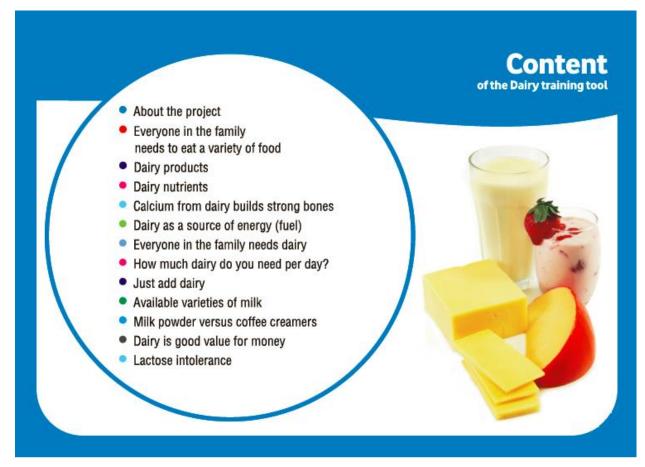
## Districts where CEP presented training



## A4 Clinic educational tool for Health Promoters





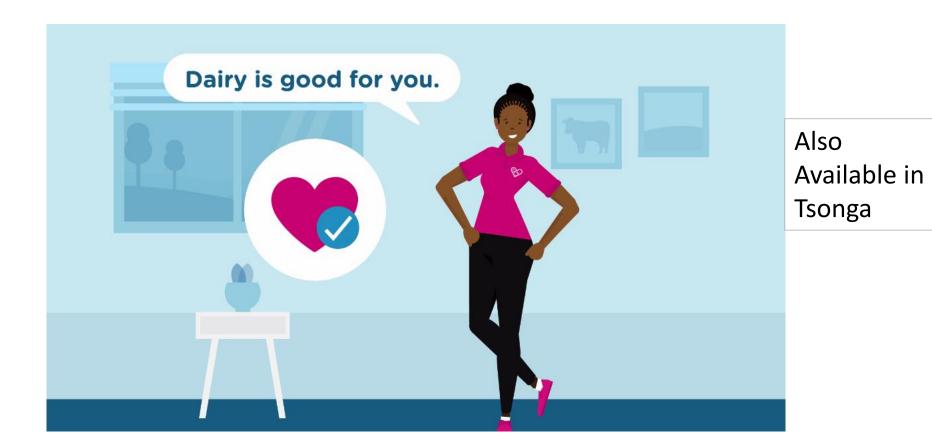




## Clinic A5 leaflets available in 9 languages



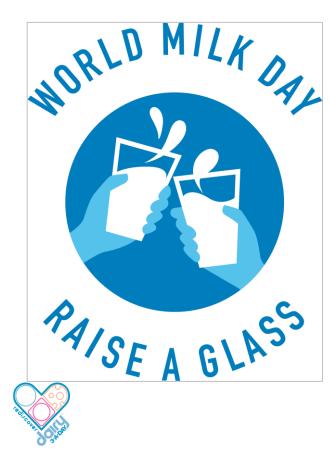
## Video for training of health educators







## Opportunities to celebrate globally







www.rediscoverdairy.co.za







#### Communicating the nutritional and health benefits of dairy

www.rediscoverdairy.co.za www.dairygivesyougo.co.za

The way forward for effective consumer education involves

- Building dairy trust through science based consumer education
- Consistent messaging
- Getting back to simple information about food and nutrition

## Online Dairy Tool 'Ask dairy' 'Do the dairy diary'



## 'Ask Dairy' on-line tool www.dairygivesyougo.co.za/askdairy



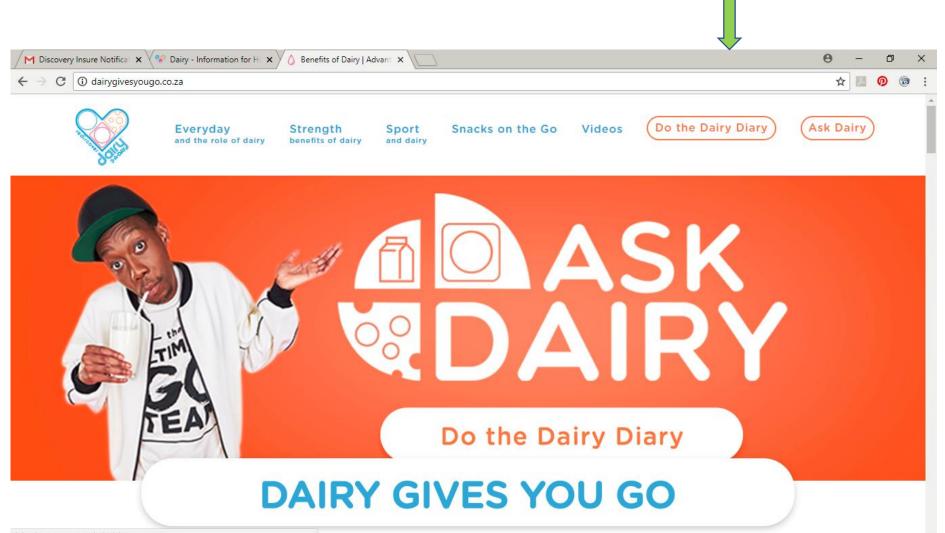


www.dairygivesyougo.co.za/ask-dairy

lilk South Africa

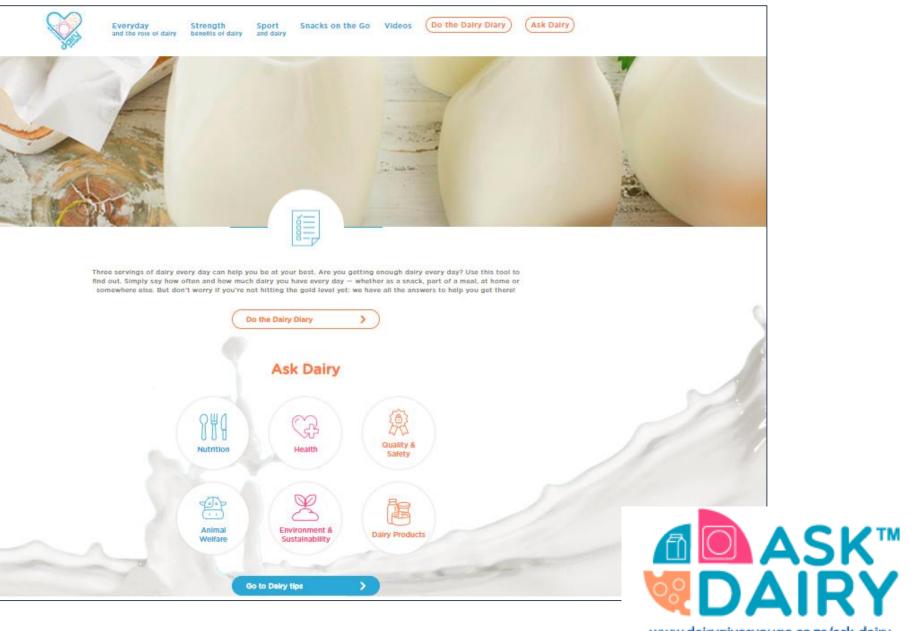


## Do the Dairy Diary









www.dairygivesyougo.co.za/ask-dairy

#### Ask Dairy

Navigating almost like an application on your phone, the tool is easily accessible and user friendly.



#### Do the Dairy Diary

Are you getting enough dairy everyday? Simply do the Dairy Diary.

In this survey consumers can assess their dairy intake by answering brief questions about their daily consumption of milk, maas, yoghurt and cheese.





## SA Society of Dairy Technology

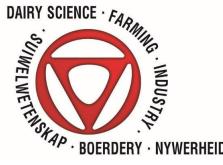


#### The goals of the SASDT are:

- The South African Society for Dairy Technology (SASDT) is an active society whose primary objective is to promote and encourage technological and scientific advancement amongst our members who are key role players in our national dairy industry.
- to promote and encourage technological and scientific advancement in the Dairy Industry by:
- the dissemination and application of knowledge,
- and the provision of opportunities for
- discussion, co-operation, education, training and research.

## Members

- The SASDT members are persons and companies from all business sectors involved in the dairy industry.
- Dairy processors, their producers and also suppliers to the dairy industry, are the key members making our society an exciting and vibrant organisation.
- We are currently represented by approxi members country-wide.



# Which dairy related topics are of importance to us?

- Our symposiums deal with various dairy topics i.e.
  - packaging,
  - sanitation,
  - fermentation organisms,
  - dairy economics domestic and global,
  - dairy trends
  - quality control systems and several
  - other new technological advances impacting our industry.



## Thank you for listening **Dairy gives you go**

#### Christine Leighton <u>christine@dairycep.co.za</u> <u>www.rediscoverdairy.co.za</u>

References used on this presentation

- 1. Trends: dairy California, Spring 2018
- 2. Zenith International: presentation IMP June 2018, City of Bath
- 3. Rabobank: Dare not to dairy, May 2018



# Quiz Time!! Last man standing



## Brunch break



