



Dairy and plant-based 'ersatz'

Estonian Dairy Forum 2020 | Wednesday 11 November 2020, Rakvere

Alexander Anton, EDA secretary general



Euroopa Maaelu Arengu
Põllumajandusfond:
Euroopa Investeeringud
maapiirkondadesse

connect to the world of dairy

EDA members



CONNECT
TO THE
WORLD
OF DAIRY

- Association of national dairy industry associations of **21 EU Member States**
- **Cooperative** and **private** milk processors



Dairy Focus 07/2017
Estonian EU Presidency



connect to the world of dairy



Euromilk

connect to the world of dairy

Welcome to Euromilk!

Please make your choice between the European Dairy Association, European Whey Processors Association and the Assifonte websites





Michel Nalet, Lactalis

Ingo Müller, DMK

Attilio Zanetti, Zanetti

Jan Teplý, Madeta

Kasper Thormod Nielsen, Arla

More than **12,000** production sites across Europe

More than **300,000** direct jobs on milk processing sites

World dairy leaders
5 of the top 10 global dairy companies are European

More than **45,000 jobs** in dairies are directly linked to export

Positive EU trade balance
The European milk processing industry brings more than **10 billion €** to the overall EU trade balance

Balanced & Successful
coexistence of cooperative model and private ownership
Around **50%** of milk collected in Europe by coops

Partnering
around **700,000** dairy farms across Europe

A rich and tasty cultural heritage
of more than **300** registered cheeses and dairy products

Plant-based dairy alternatives go premium

02 Nov 2020

As consumers increasingly look to add plant ingredients to their diets, traditional products from yogurts to cheeses are getting a vegan update. Texture and taste are key aspects promoted to consumers as they look for premium offerings.



The long read

White gold: the unstoppable rise of alternative milks



Danone Has Launched Its First Vegan Actimel Range







19⁹⁰ 22³⁰ 13⁹⁰ 21⁵⁰ 14⁵⁰ 10⁹⁰



LA BONNE AFFAIRE



CHEDDAR FLAVOR • GOÛT CHEDDAR •
SMAAK CHEDDAR • GESCHMACK CHEDDAR

NET WEIGHT / POIDS NET
NETTOGEWICHT

160g

VEGAN SANDWICH FILLING INGREDIENTS: Water, modified starch (potato, maize), coconut oil, sea salt, stabilizers (xanthan gum, locust bean gum), fermented sugar, natural flavouring (0,3%), thickener (Processed Eucheuma seaweed), antioxidant (citric acid), colorant (beta-carotene, bell pepper extract). - May contain gluten, soy, nuts, celery and mustard. **TRANCHES VÉGÉTALENNES** INGRÉDIENTS: Eau, amidon modifié (pomme de terre, maïs), huile de coco, sel de mer, stabilisants (gomme xanthane, farine de graines de caroube), sucre fermenté, arôme naturel (0,3%), épaississant (Algues Eucheuma transformées), antioxydant (acide citrique), colorant (bêta-carotène, extrait de poivron). - Peut contenir gluten, soja, noix, céleri et moutarde. **VEGANISTISCH BROODBELEG** INGREDIËNTEN: Water, gemodificeerd zetmeel (aardappel, maïs), kokosolie, zeezout, stabilisatoren (xanthaangom, johannesbrood), gefermenteerde suiker, natuurlijk aroma (0,3%), verdikkingsmiddel (citrusvruchtensap, jodiumjodide).



Delma

EXTRA



mašlany smak

ar sviesta garšu / sviesto skonio / võimaitseline

1 porcja** zawiera/
porcijā**/porcijoje**/
portsjonis**:

145 kJ
35 kcal
2%*

100 g:
1450 kJ / 346 kcal



Delma

PL: Margaryna półtłusta o smaku masła.

Składniki: woda, oleje roślinne (rzepakowy, palmowy, słonecznikowy), sól (0,3%), emulgator (mono- i diglicerydy kwasów tłuszczowych), kwas (kwas cytrynowy), aromaty, witaminy A, D i E, barwniki (karoteny) Zawartość tłuszczu 39%.

LV: Pazemināta tauku saturs margarīns (39 %) ar sviesta garšu. Vitamīnu A, D, E un Omega-3 taukskābju avots. Nesatur konservantus. Sastāvdaļas: ūdens, augu eļļas (rapšu, palmu, saulespuķu), sāls (0,3 %), emulgatori (taukskābju monoglicerīdi un diglicerīdi), skābuma regulētājs (citronskābe), aromatizētāji, vitamīni (A, D, E), krāsviela (karotīni). Tauku saturs: 39 %.



EUROOPA PARLAMENDI JA NÕUKOGU MÄÄRUS (EL) nr 1308/2013,

17. detsember 2013,

millega kehtestatakse põllumajandustoodete ühine turukorraldus ning millega tunnistatakse kehtetuks nõukogu määrused (EMÜ) nr 922/72, (EMÜ) nr 234/79, (EÜ) nr 1037/2001 ja (EÜ) nr 1234/2007

Ainult piimatoodetele reserveeritakse:

a) järgmised kõigil turustusetappidel kasutatavad nimetused:

i) vadak;

ii) koor;

iii) või;

iv) peet;

v) võiõli;

vi) kaseiinid;

vii) veevaba piimarasv;

viii) juust;

ix) jogurt;

x) keefir;

xi) kumõss;

xii) viili/fil;

xiii) smetana;

xiv) fil;

xv) rjaženka;

xvi) rügušpiens;

b) need nimed direktiivi 2000/13/EÜ artikli 5 või määruse (EL) nr 1169/2011 artikli 17 tähenduses, mida tegelikult piimatoodete kohta kasutatakse.

EU court bans dairy-style names for soya and tofu



*"Article 78(2) and Annex VII, Part III to Regulation (EU) No 1308/2013 of the European Parliament and of the Council of 17 December 2013 establishing a common organisation of the markets in agricultural products (...) **must be interpreted as precluding the term 'milk' and the designations reserved by that regulation exclusively for milk products from being used to designate a purely plant based product in marketing or advertising, even if those terms are expanded upon by clarifying or descriptive terms indicating the plant origin of the product at issue (...)**"*

ECJ Judgment 14 June 2017, Case C-422/16



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Those designations shall also be protected from:

(a) any direct or indirect commercial use of the designation;

(i) for comparable products or products presented as capable of being substituted not complying with the corresponding definition;

(ii) in so far as such use exploits the reputation associated with the designation;

(b) any misuse, imitation or evocation, even if the composition or true nature of the product or service is indicated or accompanied by an expression such as “style”, “type”, “method”, “as produced in”, “imitation”, “flavour”, “substitute”, “like” or similar;

(c) any other commercial indication or practice likely to mislead the consumer as to the product’s true nature or composition.



European Dairy Association @EDA_Dairy · Oct 23

🇪🇺 #EuropeanParliament votes the protection of dairy 🧀🥛 terms like 'milk', 'butter', 'whey' & alike ! A good day for dairy, for European consumers and citizens and for Europe ! @LinsNorbert @HerbertDorfmann @paolodecastro @UliMuellerMdEP @EricAndrieuEU @peter_jahr @ASanderMEP



🗨 26

↻ 36

❤ 45



Sellers of soya milk and tofu butter in EU
told to rebrand

FINANCIAL TIMES

'The judgment was celebrated by dairy farm groups. "The unique and natural blend of micro- and macronutrients of milk and dairy products cannot be matched by any plant-based product," said Alexander Anton, secretary-general of the European Dairy Association'

“The protection of dairy terms is contrary to efforts to create a green architecture for a future CAP that will play a fundamental role in supporting climate change action and promoting healthy, sustainable and plant-based diets for over 500 millions consumers”

Joint letter to MEPs of 28.08.2020





“Our goal is to reconcile the economy with our planet, to reconcile the way we produce and the way we consume with our planet and to make it work for our people.”

Ursula von der Leyen

President of the European Commission

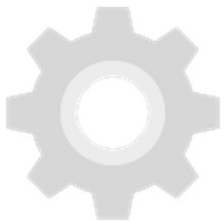
The European Green Deal







- **FOP nutrition labelling, origin labelling** for milk (and milk as ingredient), develop label for envi and climate footprint (**'sustainable food logo'**), **animal welfare logo**



- Sustainable **dietary guidelines**, promote **healthy diets** (focus on fruits & vegetables and envi costs of food groups)

- New plan for **organic** farming & food

- Stimulate production of **alternative proteins** for food & feed



- **EU Marketing Standards:** align with sustainability criteria

An illustration of a white liquid, likely milk, being poured from a container into a glass. The liquid is captured mid-pour, creating a splash and ripples in the glass. The background is a solid blue color.

The long read

White gold: the unstoppable rise of alternative milks

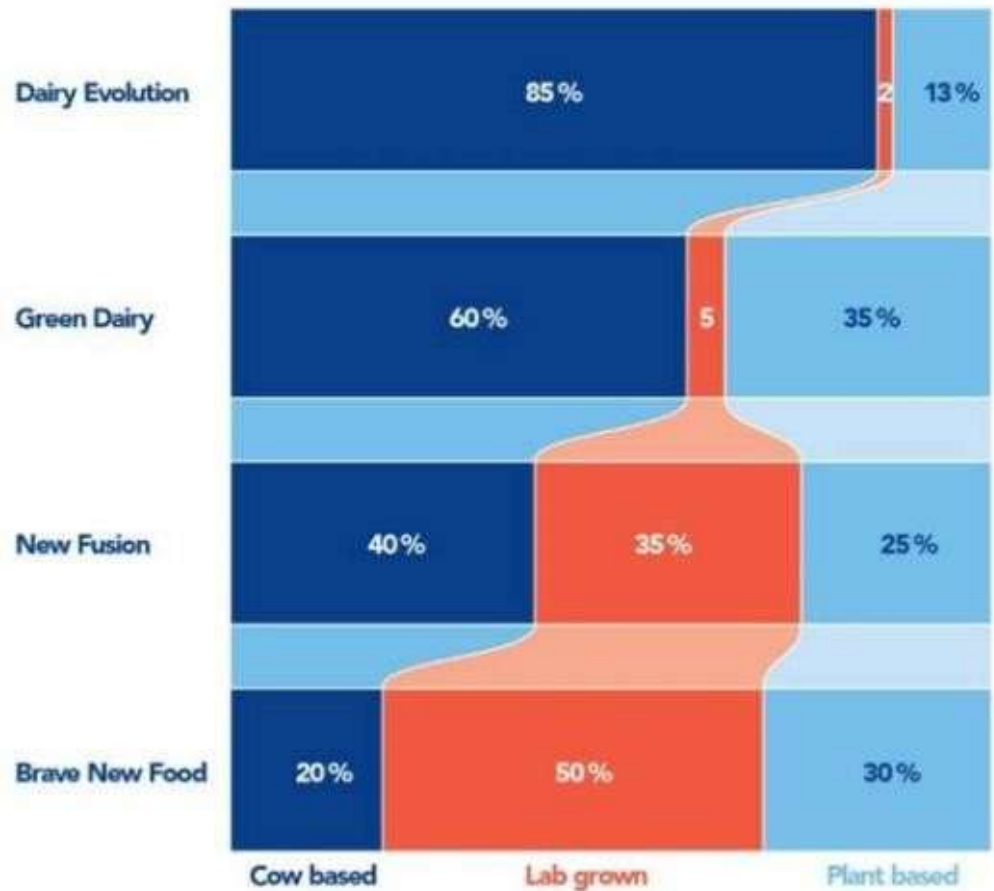


Lab-grown dairy could occupy up to 50% of the dairy market within 10 years, new research reveals

- Study from Tetra Pak and Lund University unveils four plausible scenarios that will make up the dairy industry landscape by 2030
- Potential scenarios anticipate that dairy alternatives will grow by 25-65% by 2030, with lab-grown dairy potentially occupying up to 50% of the market



Dairy industry in 2030: four scenarios





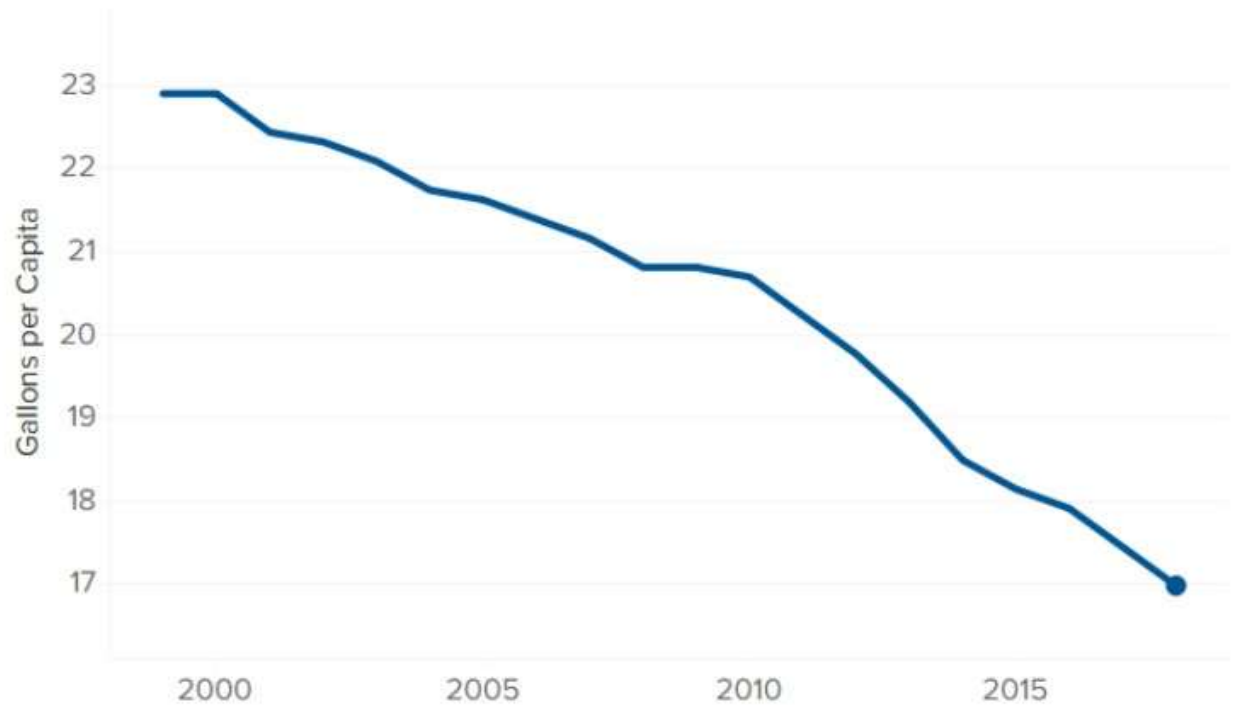
U.S. 2020* retail sales

Drinking milk +3%
'Alternatives' + 17%

* based on Jan- Sept 2020 figures

Changing consumer tastes

Declining U.S. milk consumption



NOTE: USDA provides fluid milk consumption as the product weight in pounds. Data was converted to gallons using 8.6 pounds of milk per gallon.
SOURCE: USDA National Agricultural Statistics Service

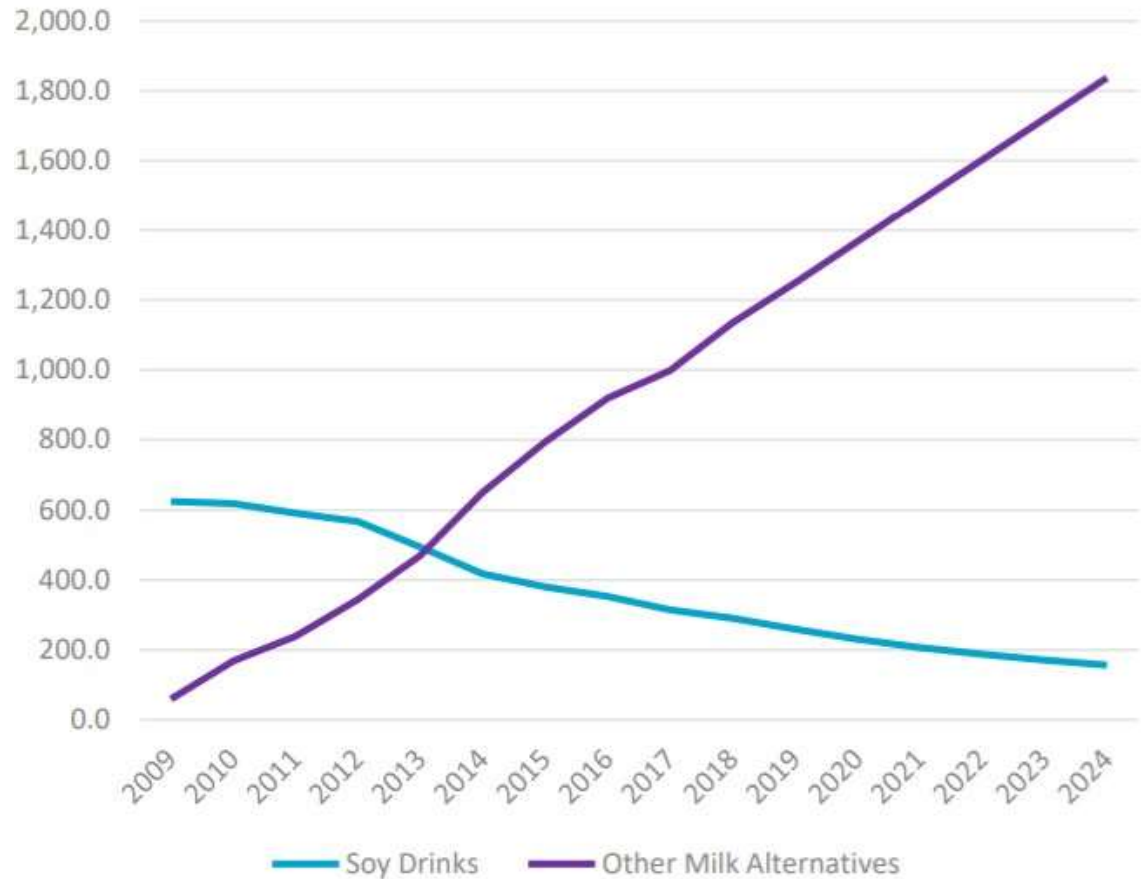


2019

Alternatives': 1,5 mio tons

Drinking milk: 21 mio tons

US: Volume growth in types of milk alternatives





Alternative drinks sales Germany

2018.	96 mio liter
2019.	132 mio liter
2020.*	204 mio liter

Drinking milk sales Germany

2018.	4.717 mio liter
2019.	4.597 mio liter
2020.*	4.530 mio liter



Estonia

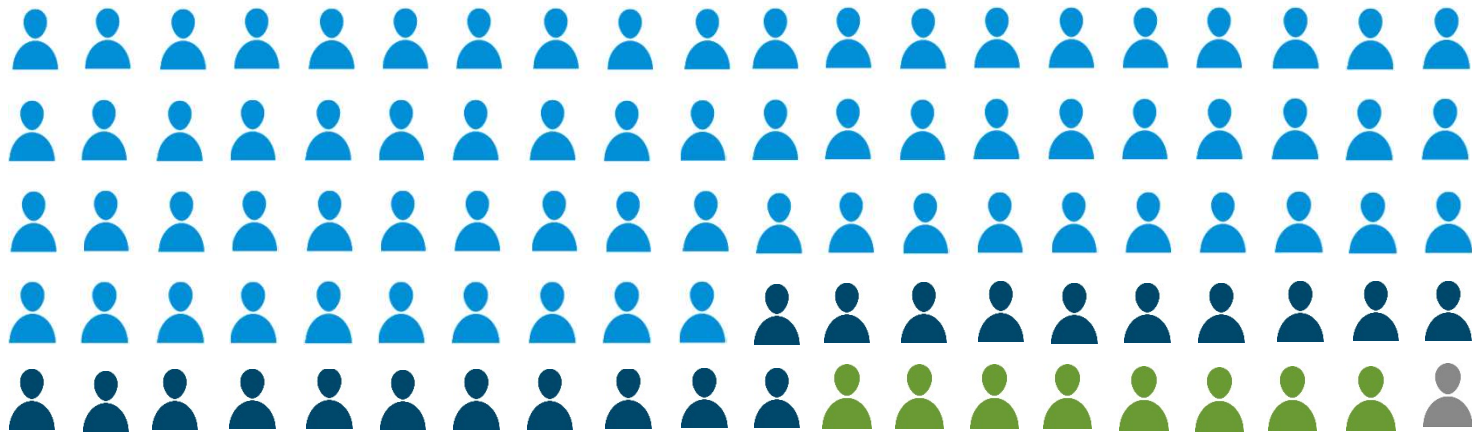
2018.	104,7 mio liter
2019.	106,1 mio liter
2020.*	106,5 mio liter

* based on Jan- Sept 2020 figures



The shifting dairy market - Focus on Europe

Real dairy is an important part of Europeans' diets, with less than 1 in 10 shoppers limiting or avoiding it.



70%
consume real dairy as a regular part of their diet

21%
consume real dairy, but not regularly

8%
try to limit their consumption

1%
don't consume real dairy at all

Base: Europe (n=1,806 shoppers)

Question : Which of the following best describes your consumption of real dairy- that is, products made from the milk of animals?



The shifting dairy market - Focus on Europe

Besides health issues, animal rights and environmental issues also play an important role in limiting dairy.



Why do you avoid dairy ?

- #1 : to reduce saturated fat (30%)
- #2 : animal rights issues (30%)
- #3: environmental reasons (27%)

Base: Europe dairy avoiders (n=250 shoppers)



8%
try to limit their consumption

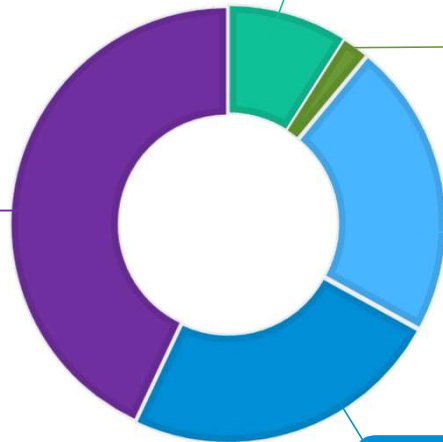
1%
don't consume real dairy at all



4 out of 10 European shoppers consume both real dairy as well as dairy alternatives.

Dairy alternatives still have growth potential.

43% consume both real dairy, as well as dairy alternatives



9% prefer dairy alternatives, but also consume real dairy

2% only consume dairy alternatives

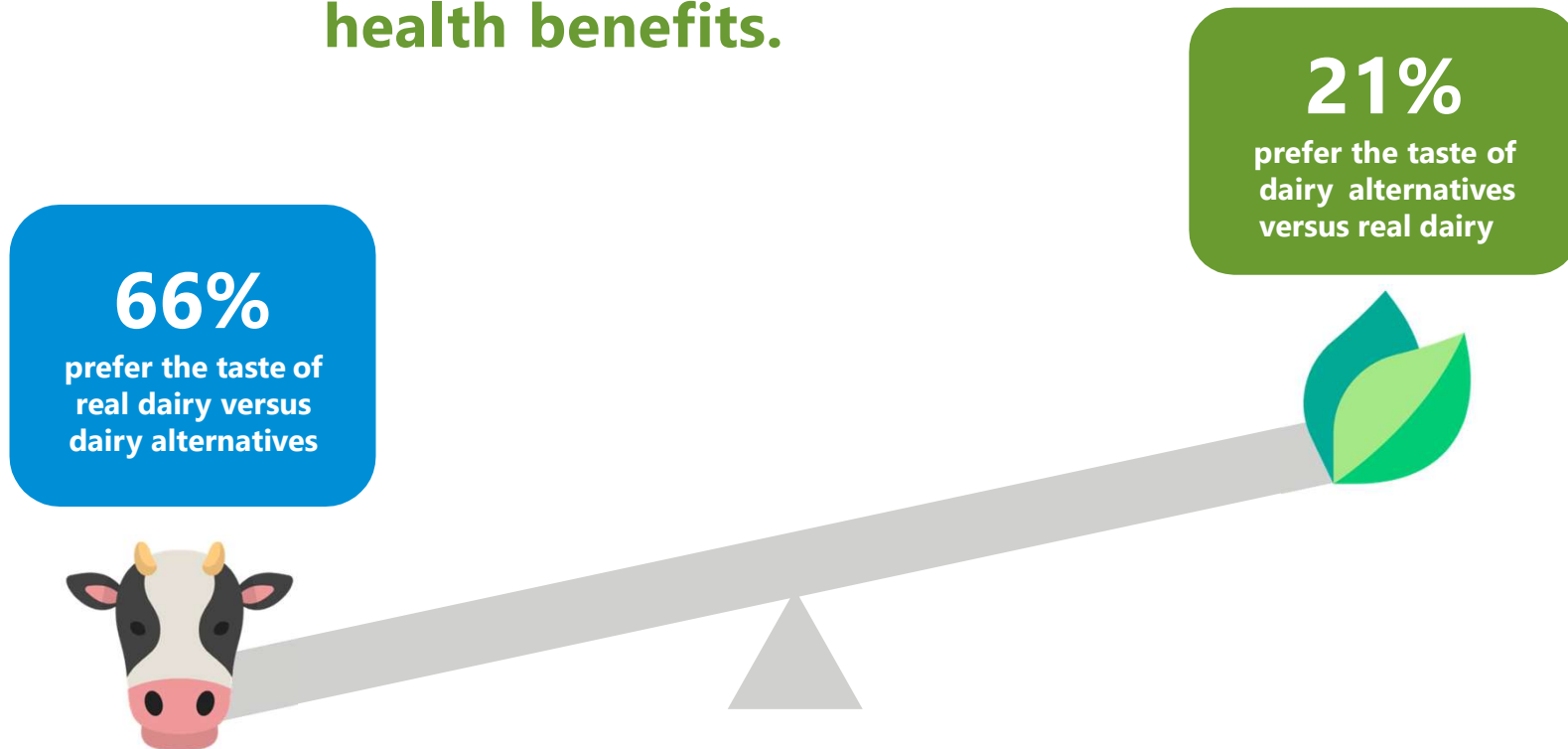
22% have tried but do not like dairy alternatives

23% have never tried dairy alternatives

- Base: Europe (n=1,806 shoppers)
- Question : Which of the following best describes your consumption of dairy-alternatives—that is, milk or ice cream made from plants like almonds, rice, etc., compared to real dairy?



Real dairy is preferred because of its taste and its perceived health benefits.



- Base: Europe (n=1,806 shoppers)
- Question : *When it comes to dairy and dairy-alternative purchases, how much do you agree or disagree with each statement?*



Real dairy is preferred because of its taste and its perceived health benefits.

66%
prefer the taste of real dairy versus dairy alternatives

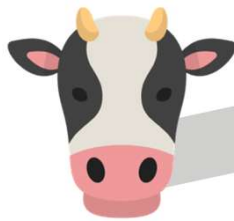
64%
agree real dairy is a necessary part of a balanced diet

However, many shoppers do recognize the health benefits of plant-based foods.

37%
agree plant-based foods are healthier than animal-based foods

38%
agree you can have a balanced diet without consuming real dairy

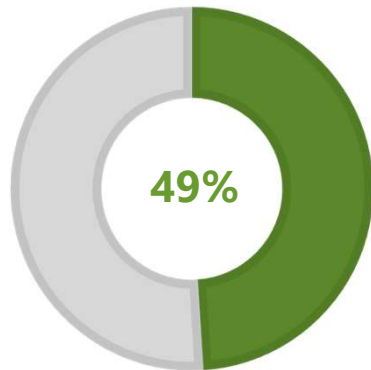
21%
prefer the taste of dairy alternatives versus real dairy



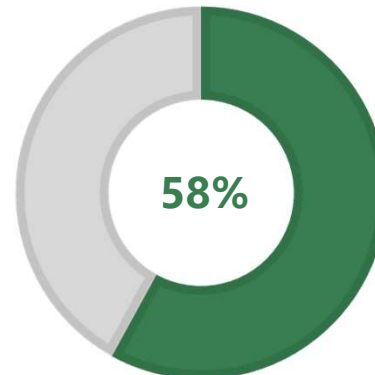
- Base: Europe (n=1,806 shoppers)
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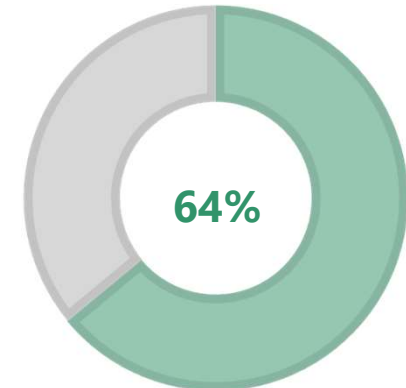
European shoppers have high expectations of dairy regarding its health benefits, and brands need to develop trust around health.



say they expect dairy products to be **healthier than other foods**



state **they will pay more** for products they perceive to be healthier



claim they are (very) likely to seek out and purchase a brand **they trust to use healthy ingredients**

- Base: Europe (n=1,806 shoppers)
- Question : *When it comes to dairy and dairy-alternative purchases, how much do you agree or disagree with each statement?*

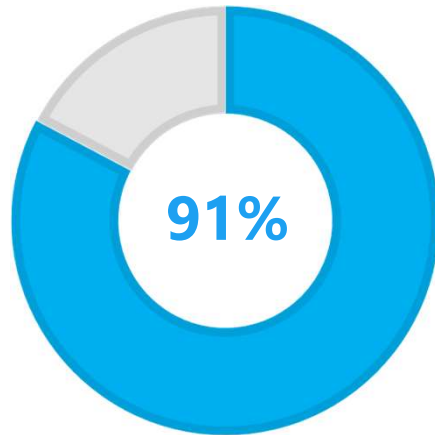
- Base: Total of 3237 Ratings: Europe Yogurt Raters (n=734); Europe Ice Cream Raters (n=763); Europe Dairy Dessert Raters (n=847); Europe Cream Cheese Raters (n=893)
- (responses shown are % of shoppers responding 'extremely to very likely')



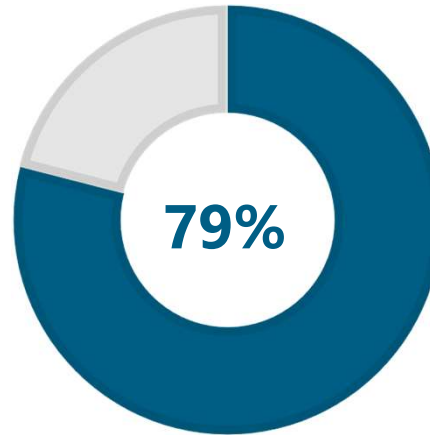
Ultimately, taste is the key factor determining repeat purchase for dairy products.



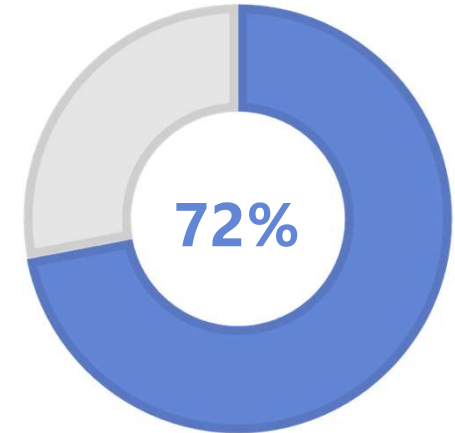
QUESTION: How important are each of these factors as you decide whether you like a dairy product and will purchase it again?



will purchase a dairy product again if it **tastes good**



will purchase a dairy product again if it provides an **indulgent experience**

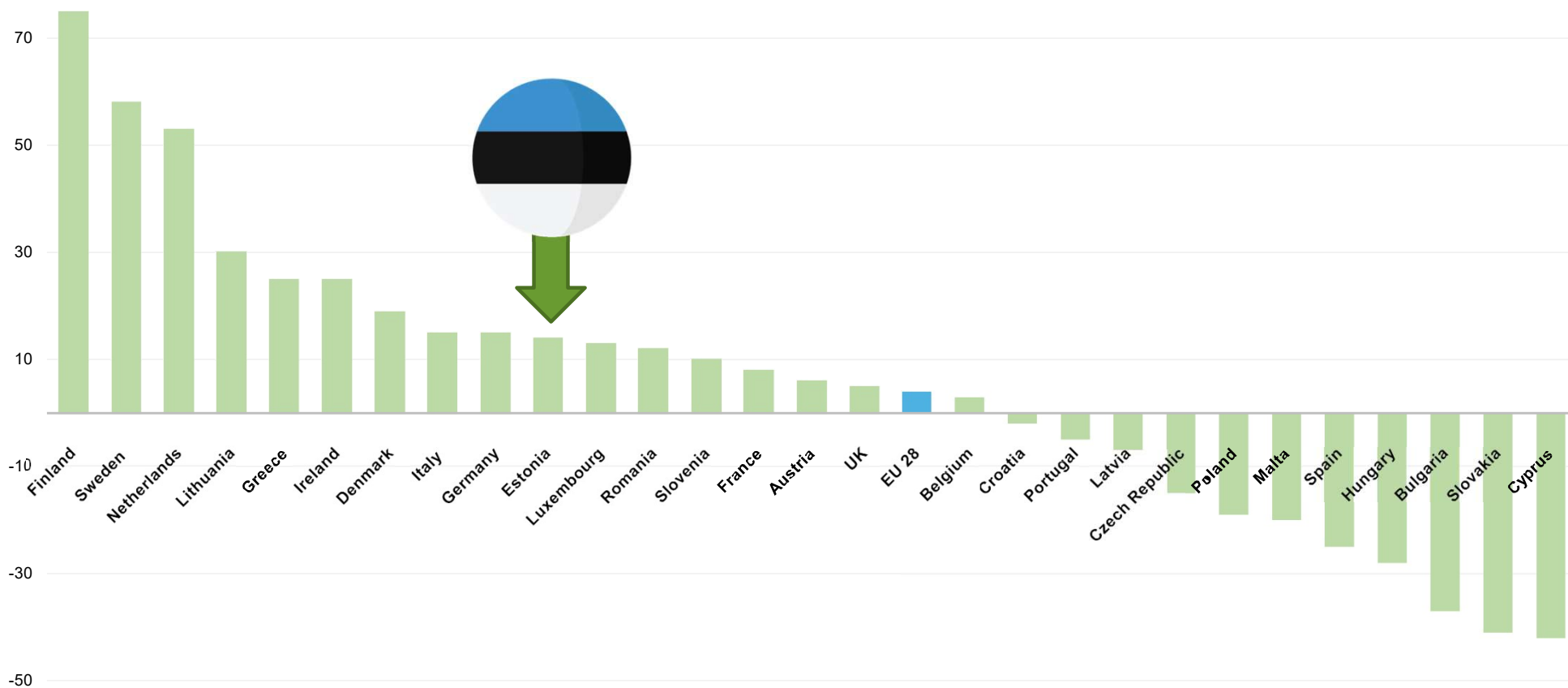


will purchase a dairy product again if it taste like it's **made with milk or cream**

Base: Total of 3237 Ratings: Europe Yogurt Raters (n=734) ; Europe Ice Cream Raters (n=763) ; Europe Dairy Dessert Raters (n=847) ; Europe Cream Cheese Raters (n=893)

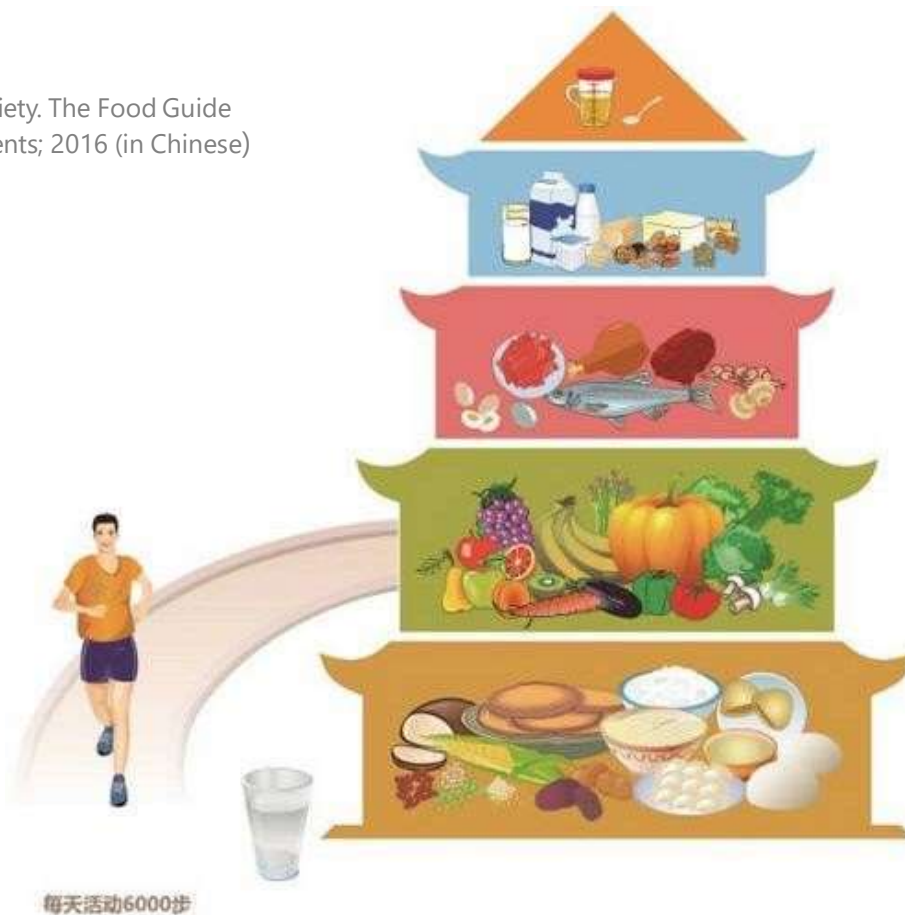


Deviation from average dietary recommendations for milk (%) EU27, EU Member States and UK



The Chinese Nutrition Society. The Food Guide Pagoda for Chinese Residents; 2016 (in Chinese)

Chinese Dietary Pagoda



盐 <6克
油 25~30克

奶及奶制品 300克
大豆及坚果类 25~35克

畜禽肉 40~75克
水产品 40~75克
蛋类 40~50克

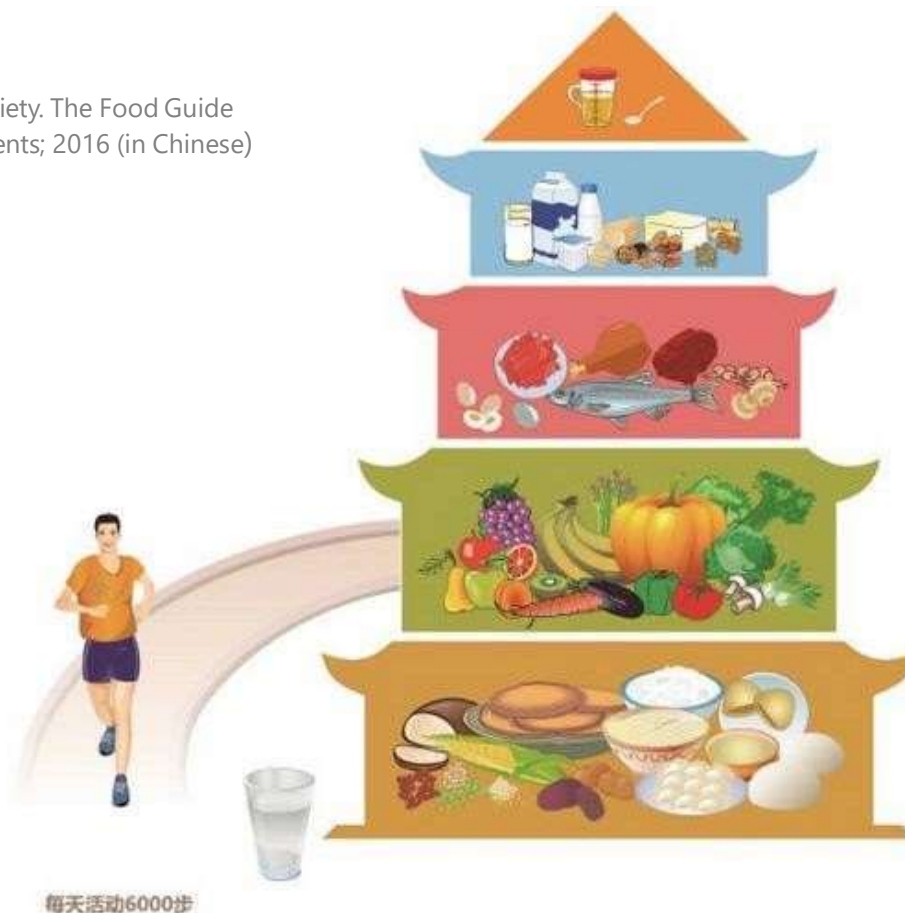
蔬菜类 300~500克
水果类 200~350克

谷薯类 250~400克
全谷物和杂豆 50~150克
薯类 50~100克

水 1500~1700毫升

The Chinese Nutrition Society. The Food Guide Pagoda for Chinese Residents; 2016 (in Chinese)

Chinese Dietary Pagoda



Salt, <6 g

Oil, 25–30 g

Milk and milk products, 300 g

Soybean and nuts, 25–30 g

Meat and poultry, 40–75 g

Aquatic product, 40–75 g

Eggs, 40–50 g

Vegetables, 300–500 g

Fruits, 200–350 g

Cereals and potatoes, 250–400 g

Whole grains and mixed beans, 50–150 g

Potatoes, 50–100 g

Water, 1500–1700 ml

connect to the world of dairy

“Milk and dairy products are a vital source of nutrition”



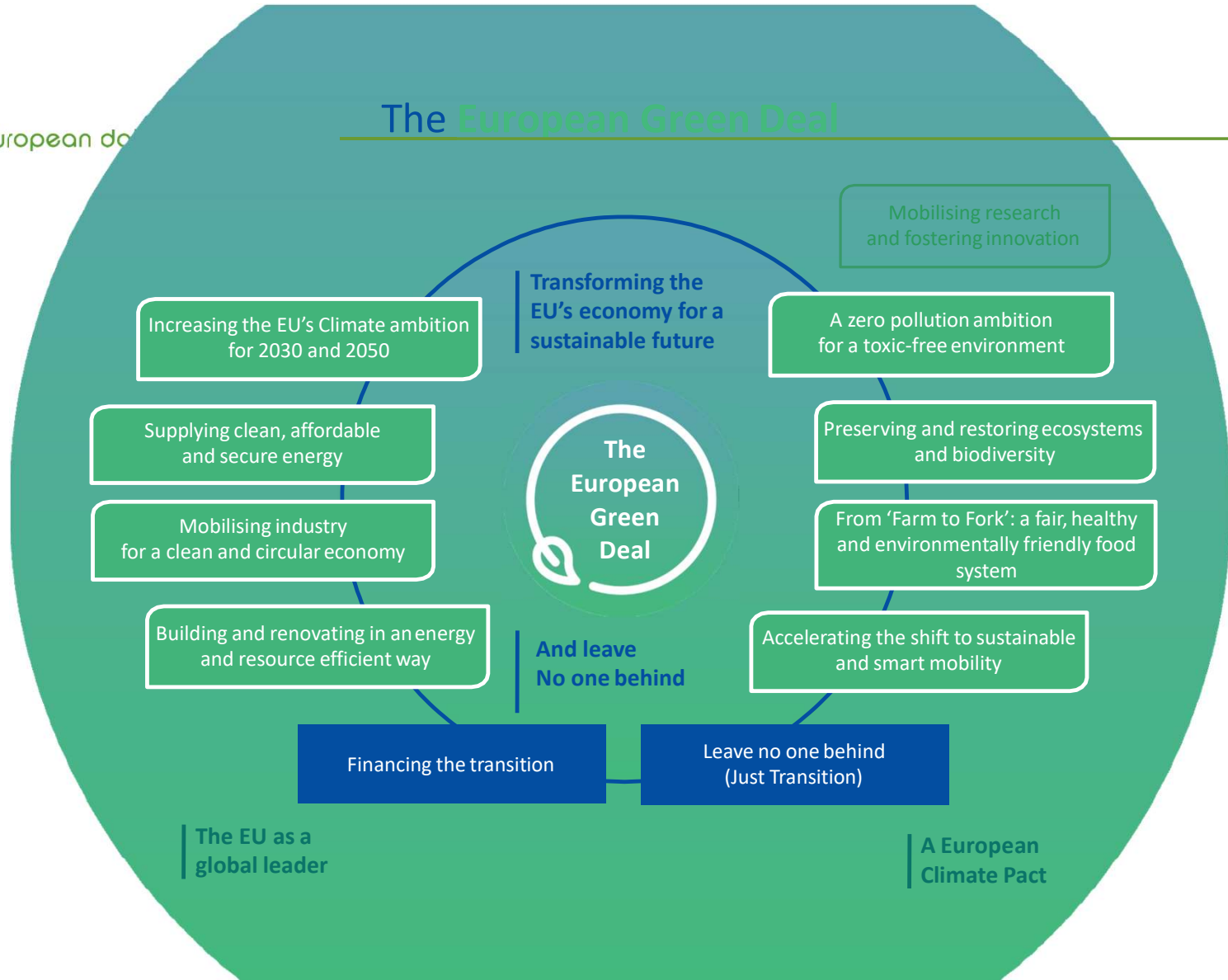


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The European Green Deal

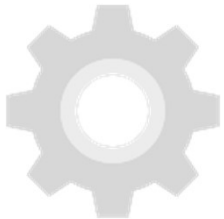








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- **EU Marketing Standards:** align with sustainability criteria

**“Milk and dairy
products are a vital
source of nutrition”**



Sli.do

Hinda esinejat ja ettekannet

