



# *Reassuring the Questioning consumer Dairy's opportunity?*



*Zoe Kavanagh  
National Dairy Council*



# Our Purpose

## Our Vision

A future in which Irish Dairy is recognised and trusted as a vital part of people's diet and general health at home & abroad, indispensable to Ireland's social and economic wellbeing

## Our Mission

To champion the sustainable role of quality, pasture-based dairy and its nutrition benefits in supporting healthier living.

## Our Strategic Pillars

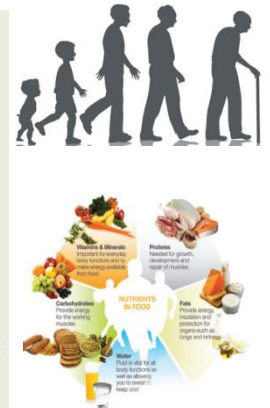
- Reputation
- Health
- Research
- Consumption



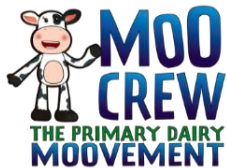
# REPUTATION MANAGEMENT



# POPULATION HEALTH



# CONSUMPTION DEVELOPMENT



# APPLIED RESEARCH

5,186 adults 60 + years



Dairy Intake



Muscle Health



Bone Health





# 10 Key Trends in Food, Nutrition & Health 2019



## Dairy's Opportunity or Threat?

- 1: Digestive Wellness – where opportunities flourish
- 2: Plant-based – easy greens fuel growth
- 3: Protein – powered by a natural health halo
- 4: Sugar – reinventing sweetness
- 5: Good carbs, bad carbs – nudging carbs in new directions
- 6: Fragmentation & personalisation – a galaxy of niches?
- 7: Snackification – harnessing the power of extreme convenience
- 8: Beverages Redefined – a flow of fresh ideas
- 9: Fat Reborn – promise of a brighter future
- 10: Authenticity & Provenance – mass market embraces the back-story

# Global Trends shaping Policy



- **The global perspective of sustainability in food systems is being formalized into individual country dietary guidelines without fully considering its impact (EAT Lancet)**
  - **The plant-based movement has reached policy-level prominence, with influential health and government groups embracing change**
  - **Nutrition may be losing its importance in the conversation about health & sustainability**
  - **Prioritizing children's nutritional needs for optimal growth and development is increasingly overlooked by other food and health concerns**
- But**
- **An increased focus on Early Childhood Education research, as well as state leadership support, will help advance efforts to improve the health of the youngest children**
  - **Dairy as a functional health food: research continues to uncover how dairy foods provide health benefits to the microbiome, chronic disease prevention, cognitive function, muscle & bone development and beyond**

# Dairy's Questioning Consumer

**Like dairy but limit it out of fear that it is fattening.**



**Concern for animal welfare and the environment. General distrust of corporations.**



**Seek dairy alternatives to avoid allergies, digestive issues, and also out of fashion.**





# Consumption Insights



Older men see positive, transformative health values



Mums see (family) nutrition but worry about own weight

Male

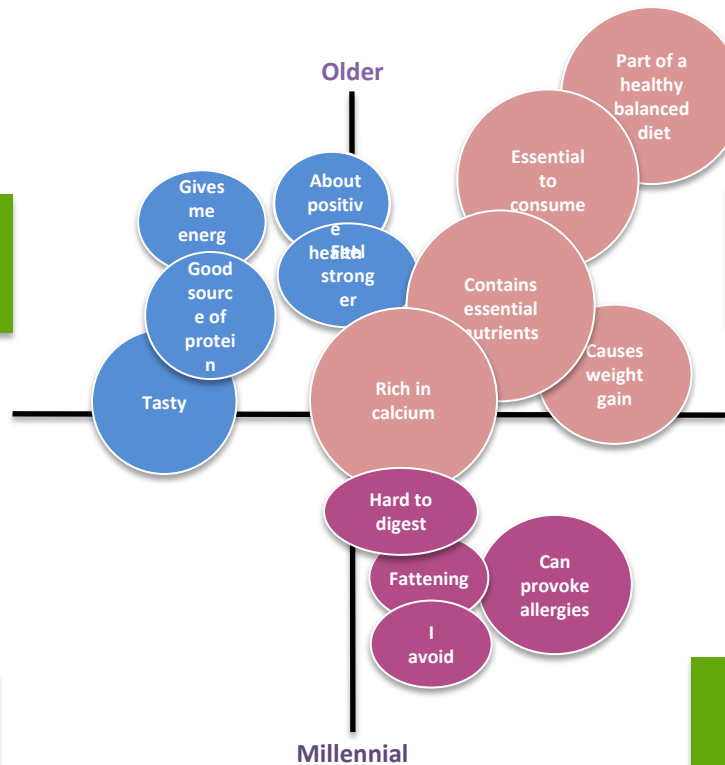
Female



Younger men see as tasty, fuels workouts



Millennial women have the more worrying perspectives





# Localization of interviews

■ 22 countries



The countries below could not answer  
(no data available, no expert, ...):  
**SWEDEN / BELGIUM / NEW ZEALAND /  
LUXEMBOURG**





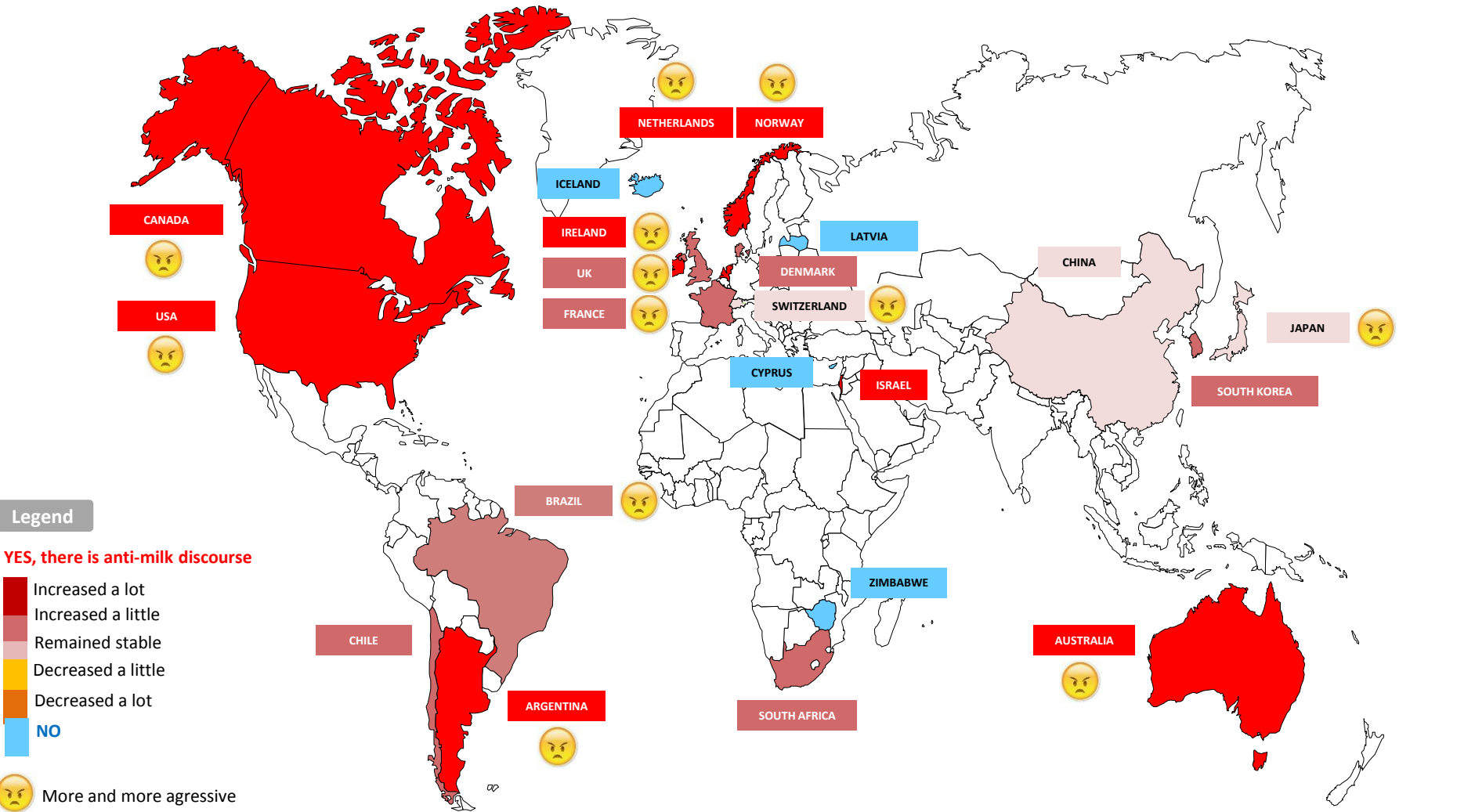
# *Anti-milk discourse*



# Anti-milk discourse

Is there anti-milk discourse in your country?

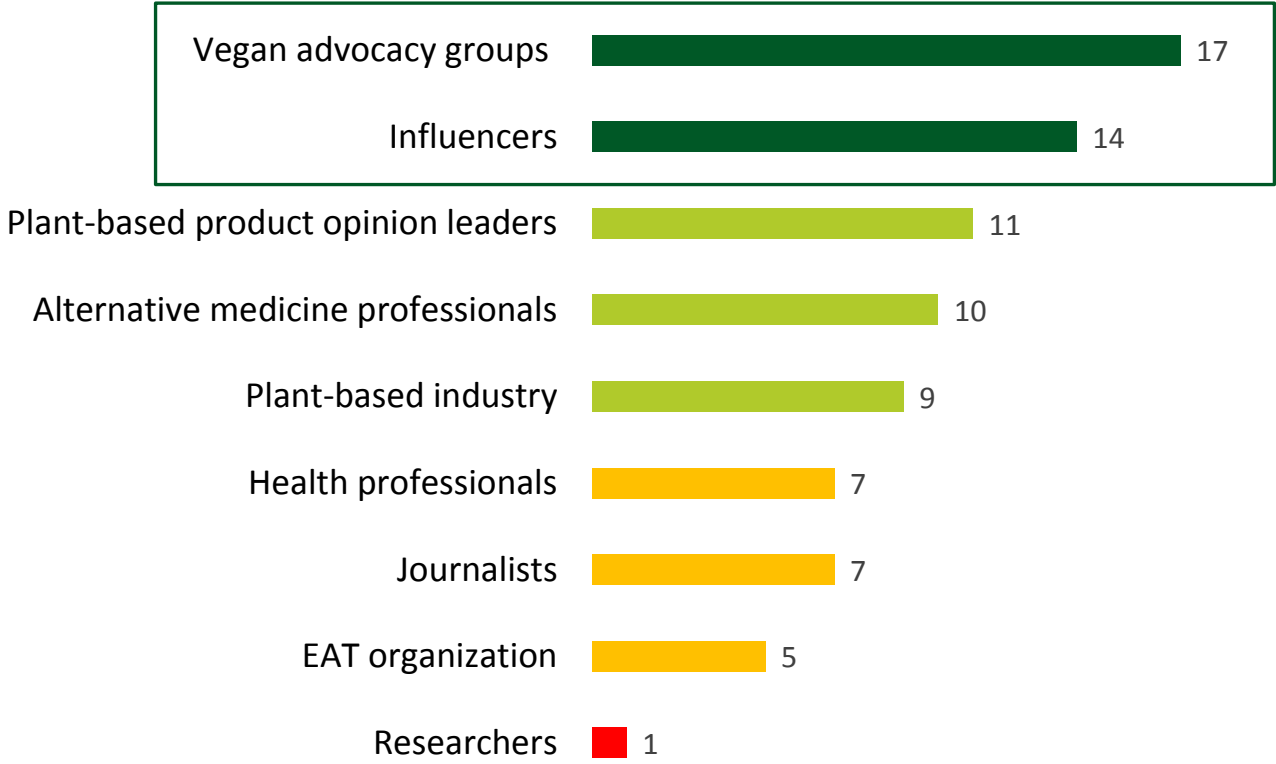
Is the anti-milk discourse becoming increasingly aggressive?



# Groups driving the anti-milk discourse



*Which groups/individuals are driving the anti-milk discourse?*

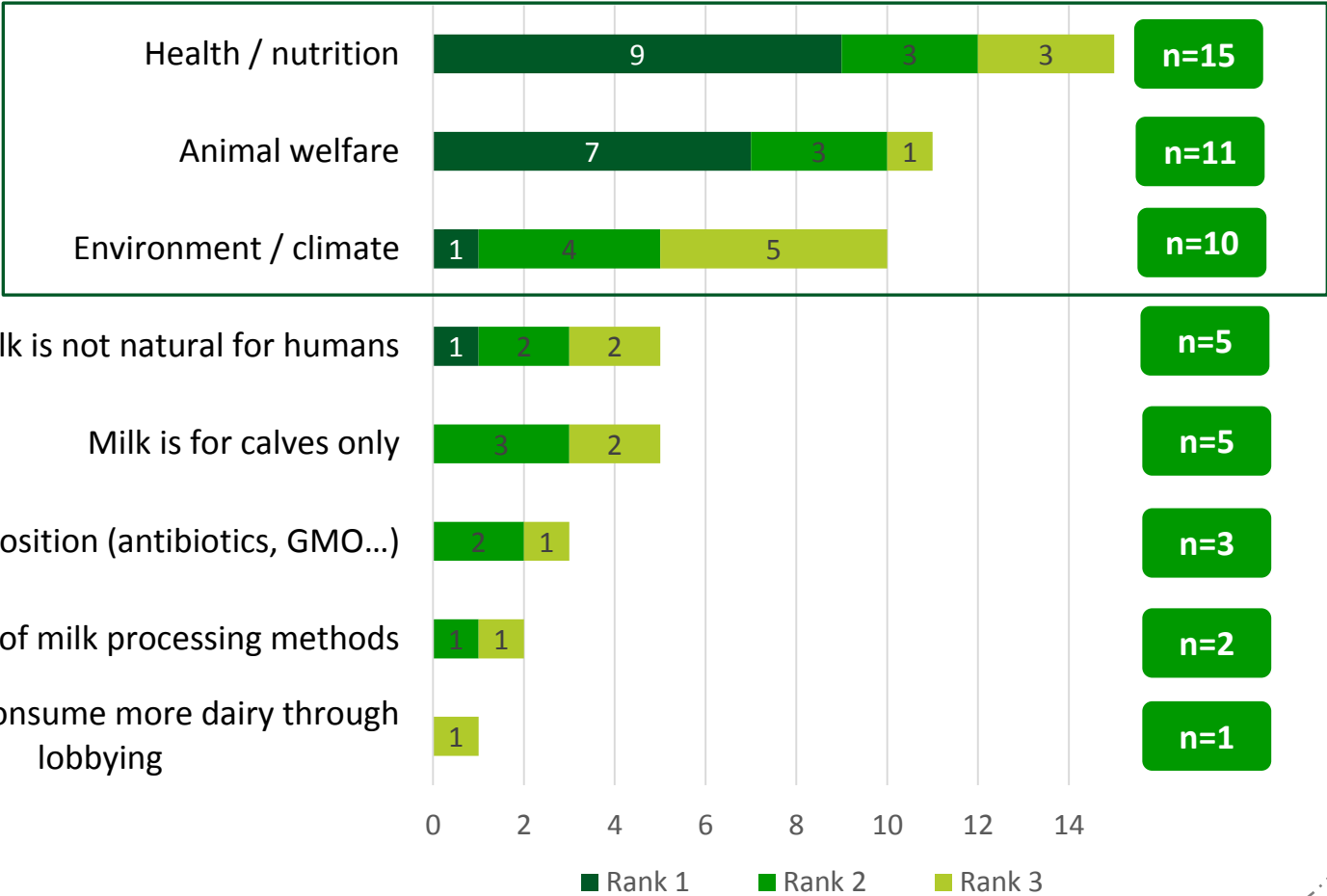


# Anti-milk discourse details



Please rank the issues below according to the importance they have in the anti-milk discourse in your country.

Ranked  
in TOP 3

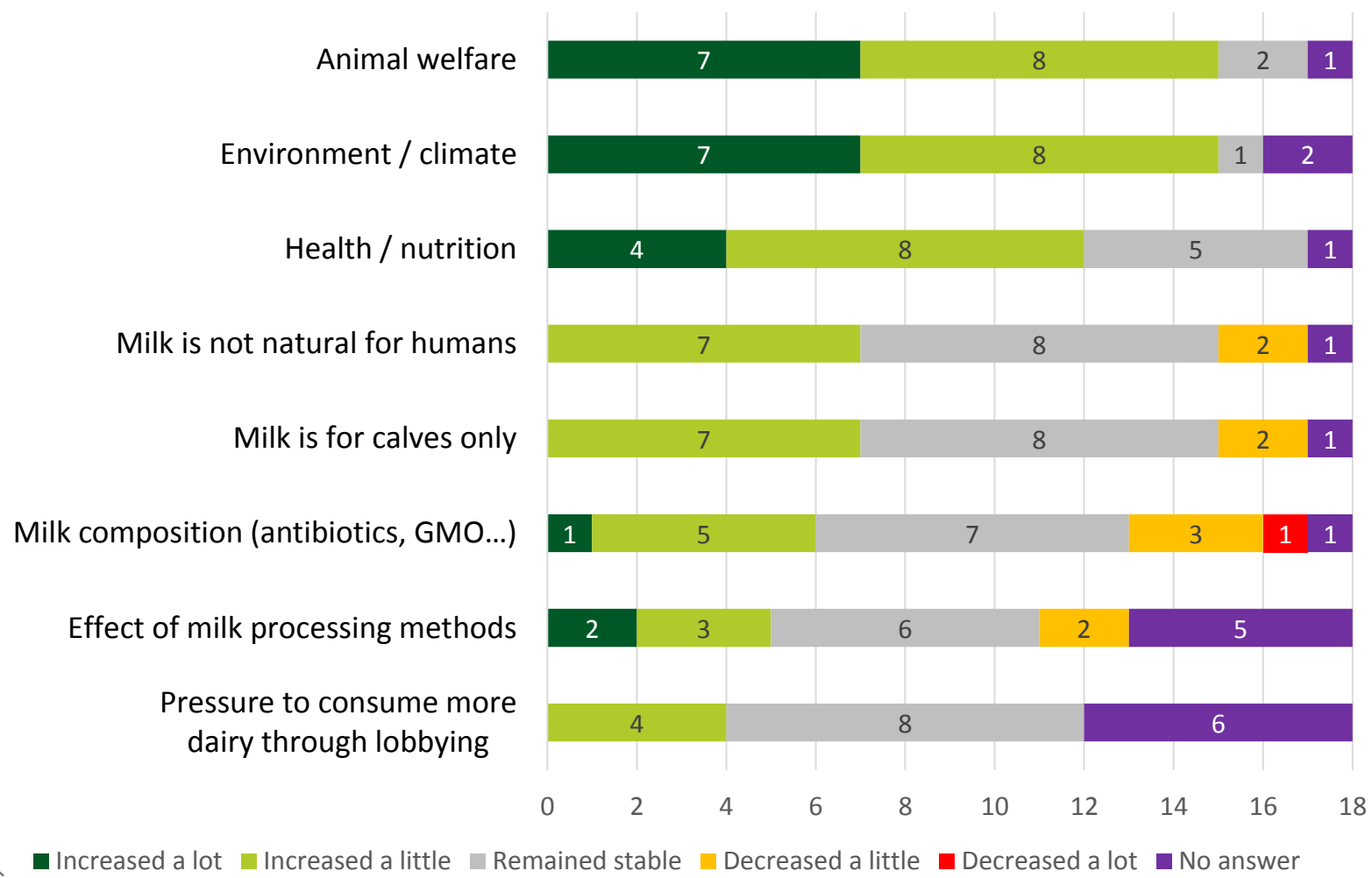




# Anti-milk discourse details



Have the issues for milk below evolved in the recent years in your country?



# Dairy-specific anti-fat discourse



Is there dairy-specific anti-fat discourse in your country?

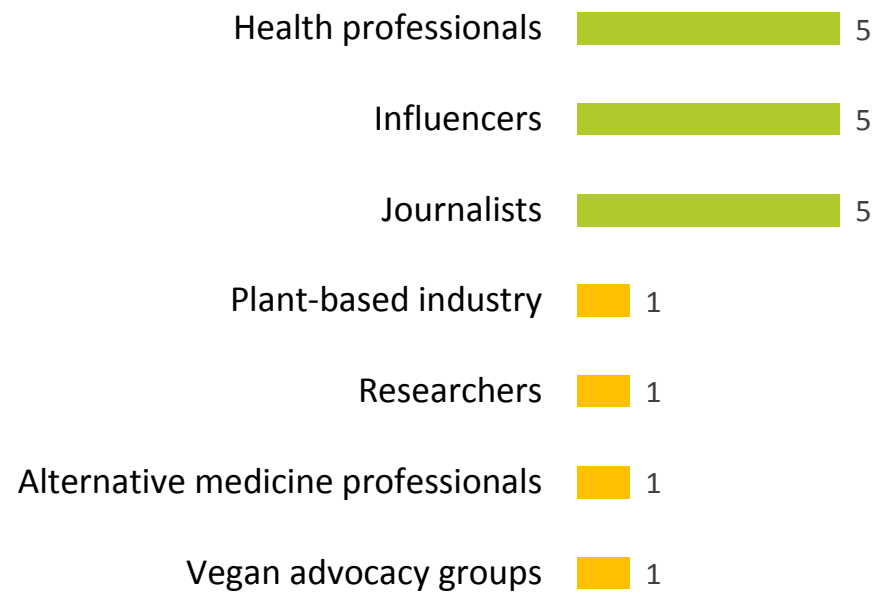
Is the anti-fat discourse becoming increasingly aggressive?



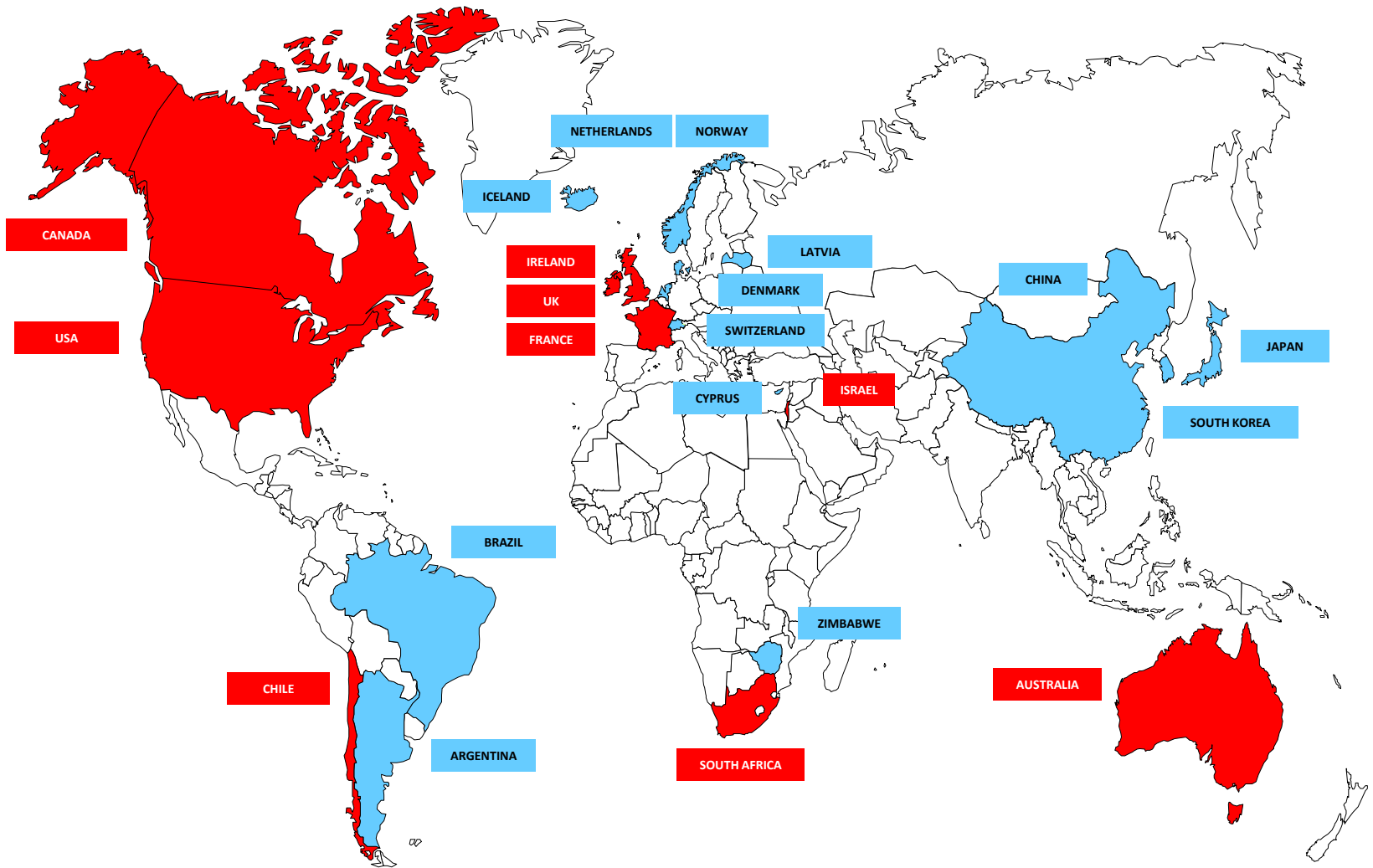
# Groups driving the anti-fat discourse



*Which groups/individuals are driving the anti-fat discourse?*



# Anti-dairy farming discourse



Legend

YES  
NO



# Purposeful Dairy Category

## Reassuring the Questioning Consumer

### REINTRODUCTION TO DAIRY

**RESPONSIBLY  
PRODUCED**



**LOCALLY  
DRIVEN**



**NUTRIENT  
RICH**



**REAL  
ENJOYMENT**



ONGOING REAL-TIME OPPORTUNITIES TO ENGAGE AND IMPACT CONSUMERS

# Climate campaign Consumer Survey Findings

July 2019  
European Milk Forum



# Cross-cutting insights based on surveys in Y1 and Y2

1

The Europeans still believe in climate change – but they are optimistic about being able to stop some of the consequences of climate change

2

Sustainability is associated with preservation of natural resources and mitigating climate change. Sustainability is not associated with ending hunger

3

App. 3 out of 4 Europeans say we need to change our pattern of consumption and production of foods – but only 6 out of 10 has actually taken climate friendly actions in the past year

4

The most popular climate conscious actions are still recycling and reducing food waste. Only 5 % point to consuming less dairy products as a climate conscious action

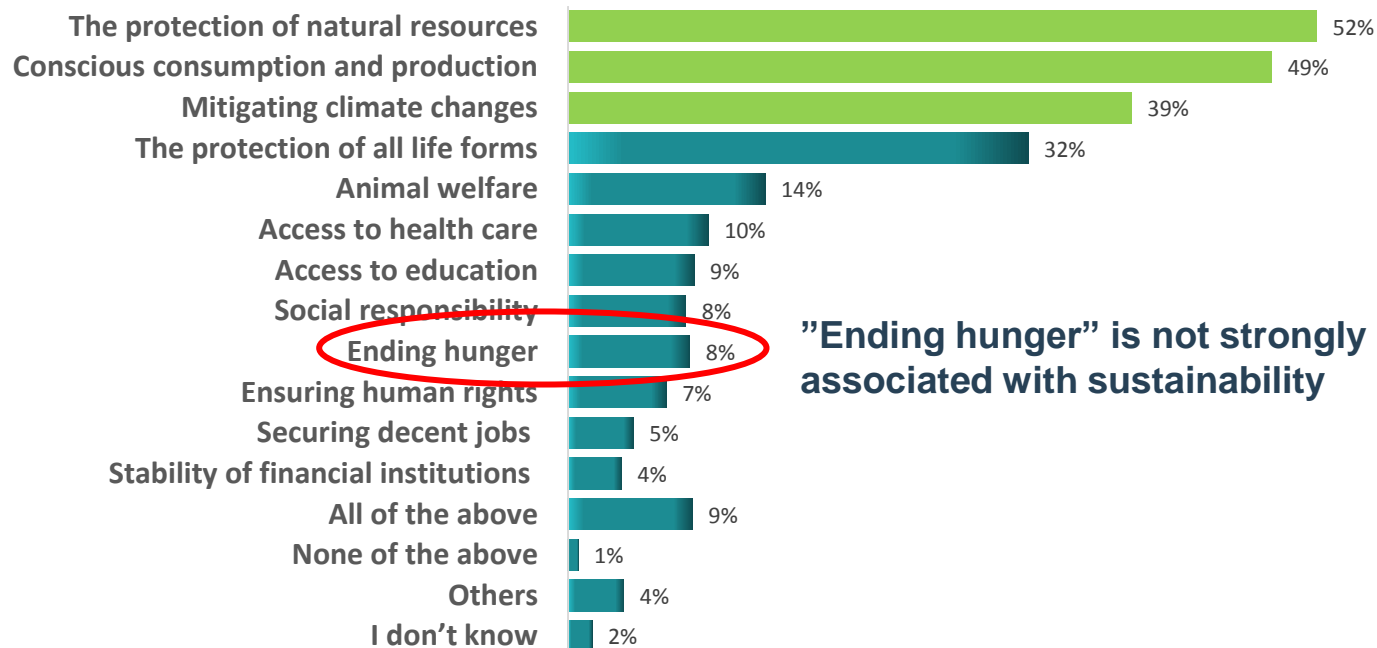
5

Price, taste and health are still the factors that most people consider when purchasing foods. Only 10 % consider carbon footprint

6

The dairy sector is associated with economic importance, health, tasty products, pollution and animal friendliness

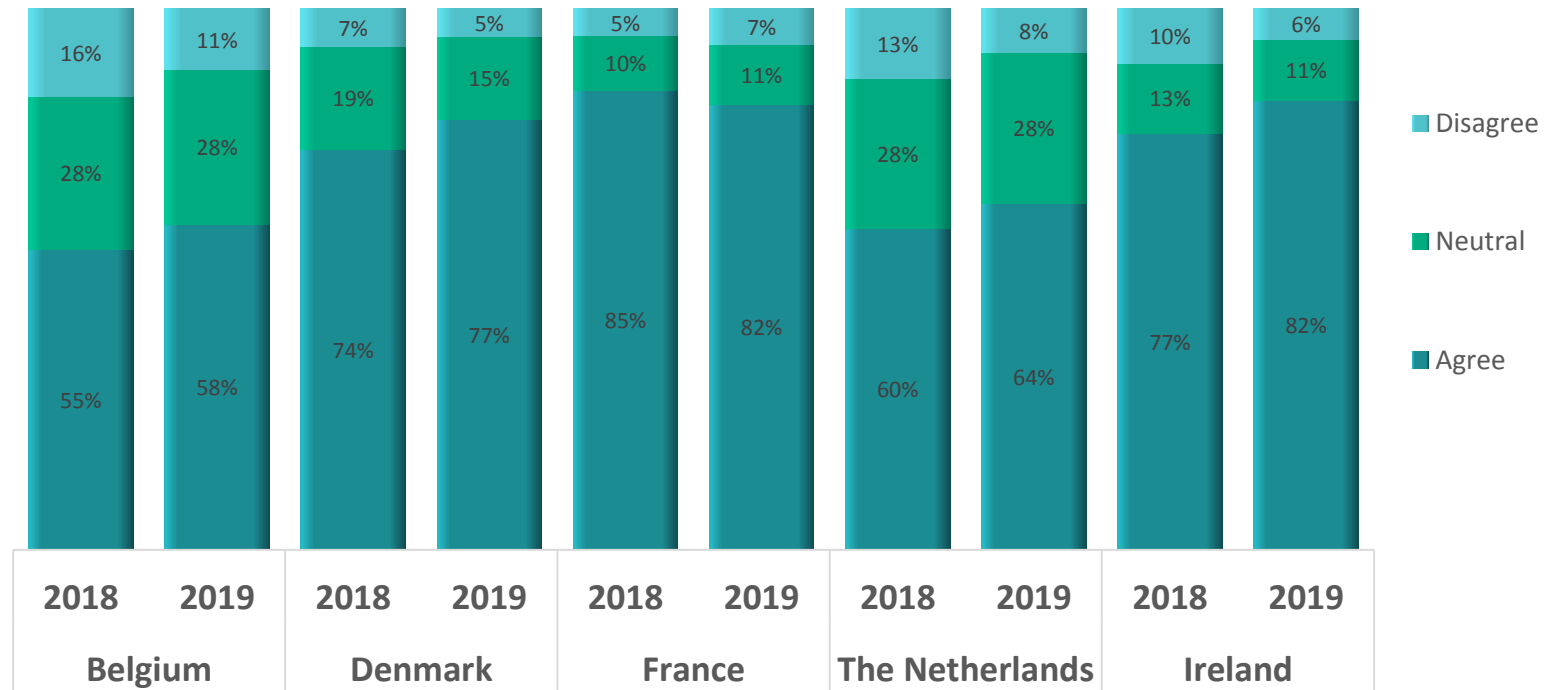
# Natural resources, conscious consumption & production and climate change is associated most with sustainability



In your opinion, which of the following do you associate with *sustainability*?

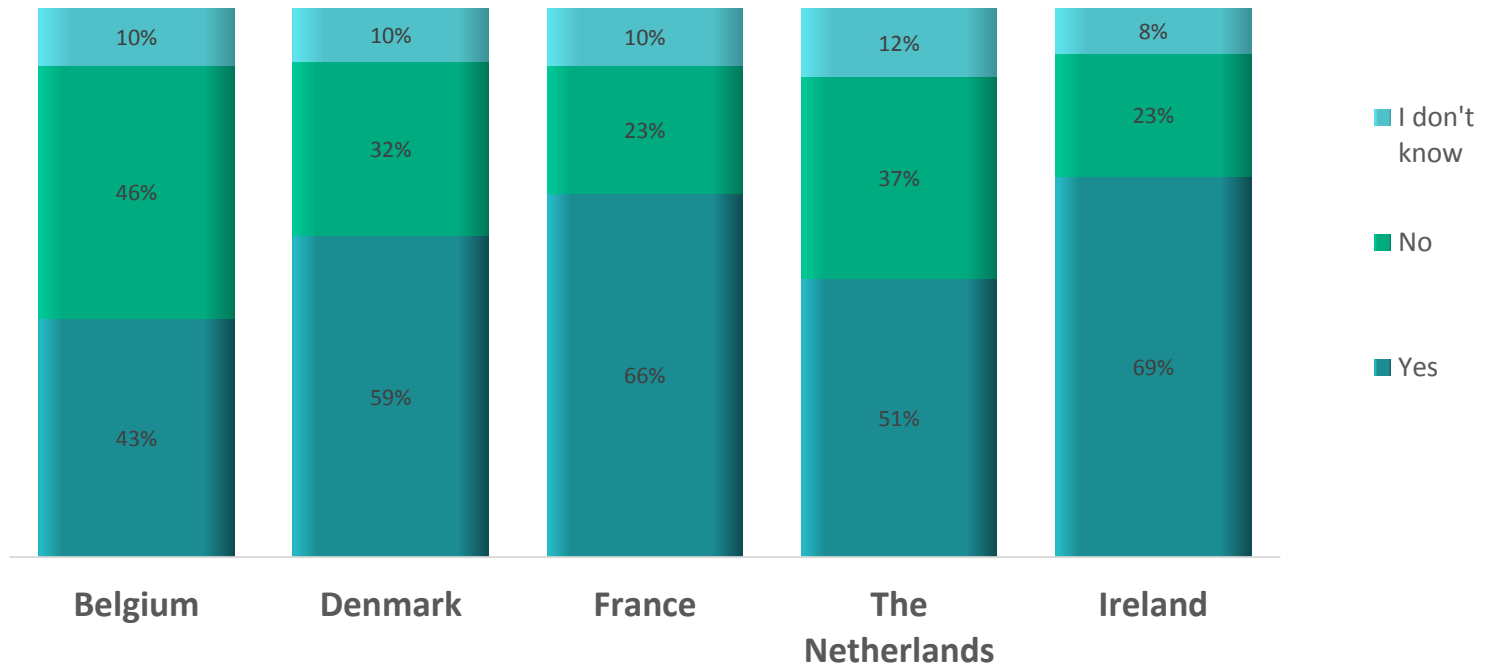


# 73% (on average) say we need to change our way of consuming and producing foods



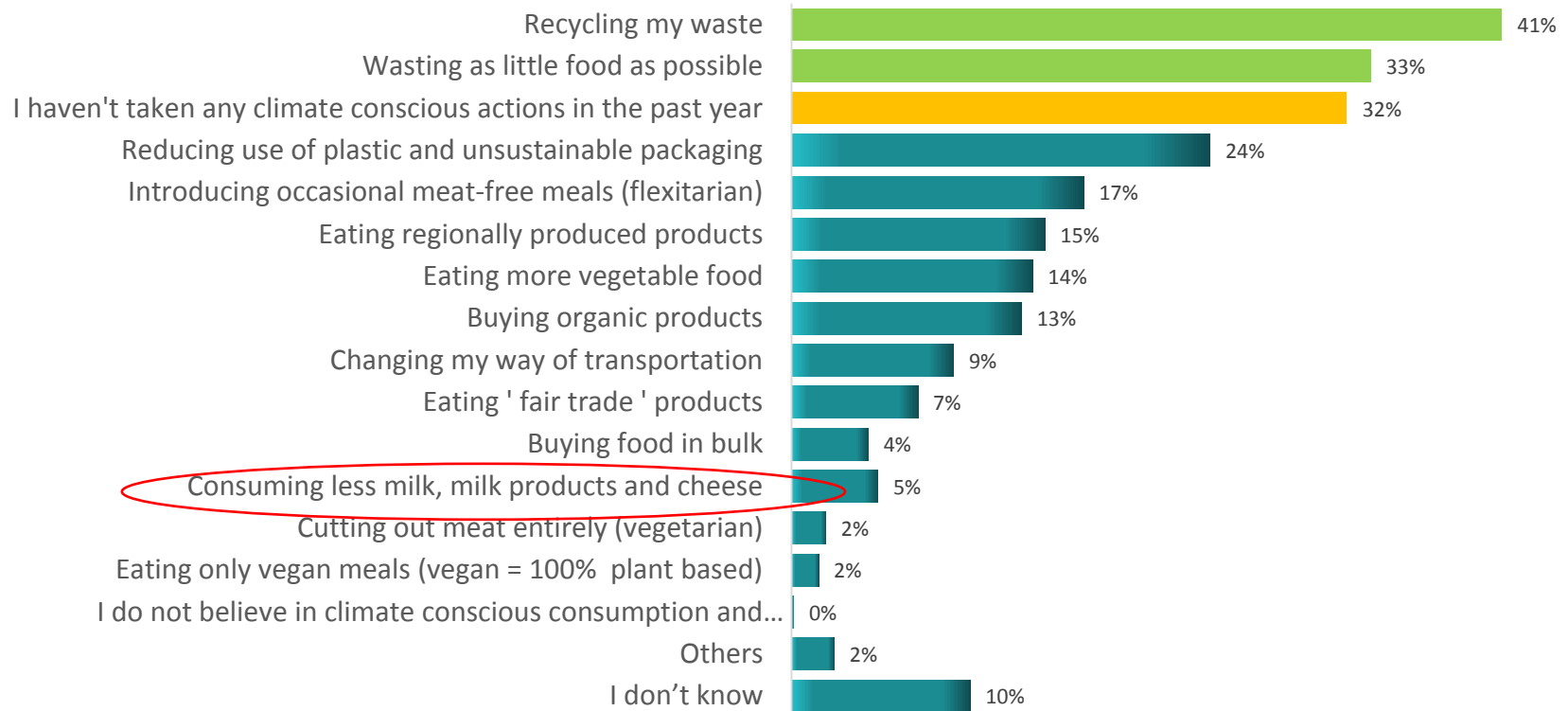
**To what extent do you disagree or agree with the statement:**  
"For the preservation of our planet we need to change the way we consume and produce food"

... But “only” 58% (on average) say they have taken any climate friendly actions in the past year



Have you taken any action or changed your behaviour due to climate concerns in the past year?

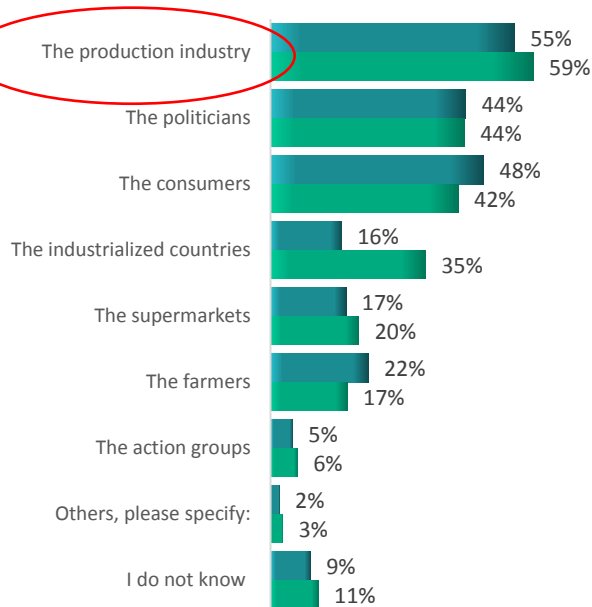
# Reducing food waste and recycling of waste are top of the list for climate conscious actions



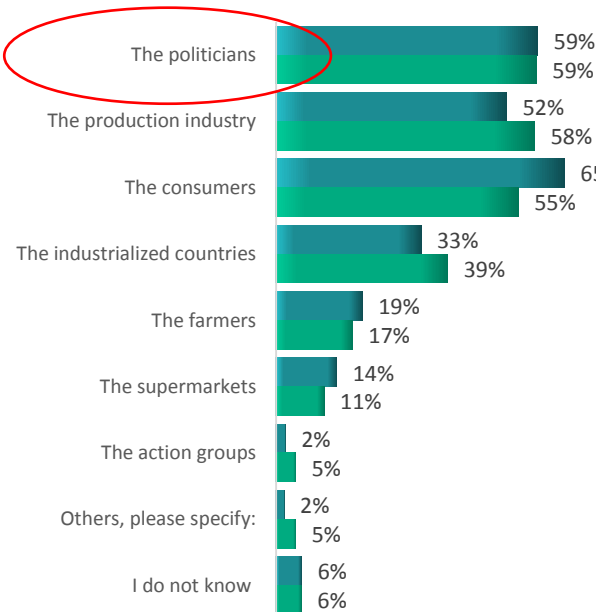
What climate conscious actions have you taken in the past year?

# The ranking of responsibility varies among the countries: The politicians, production industry and consumers are held responsible

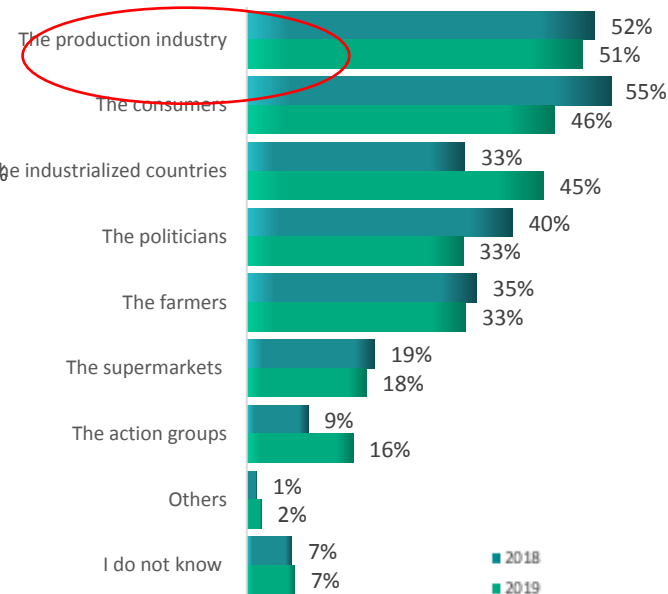
## Belgium



## Denmark



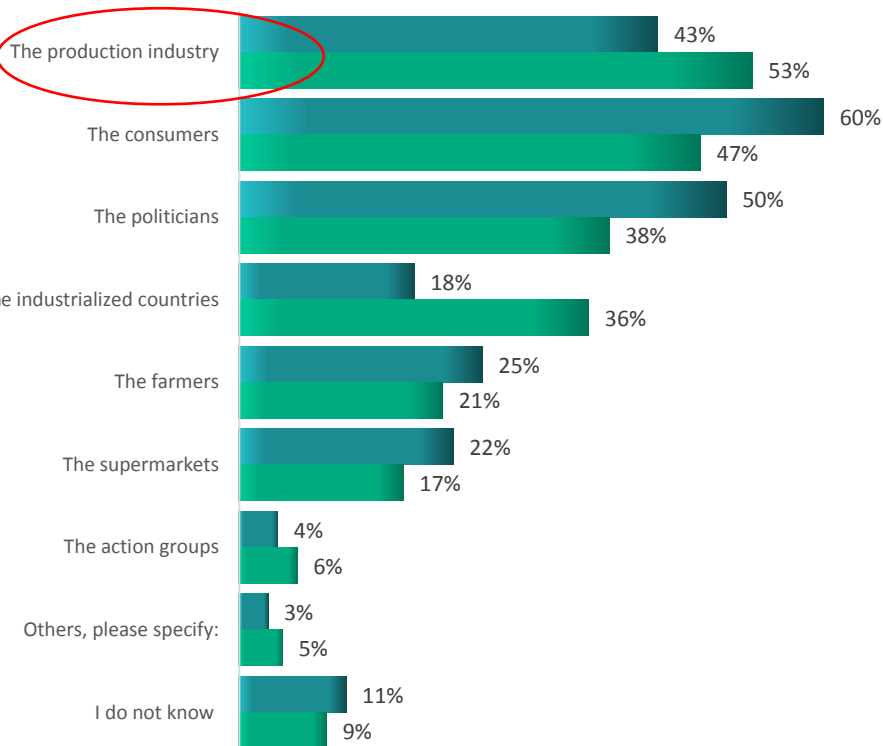
## France



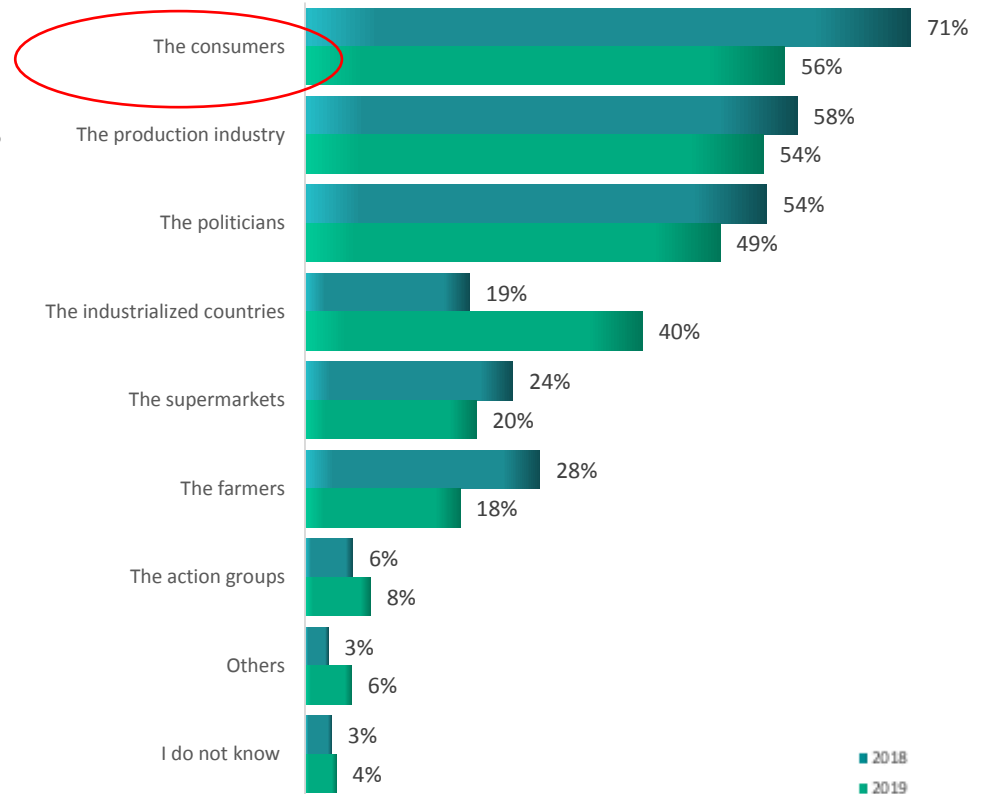
In your opinion who is responsible for creating a more sustainable future?



## The Netherlands

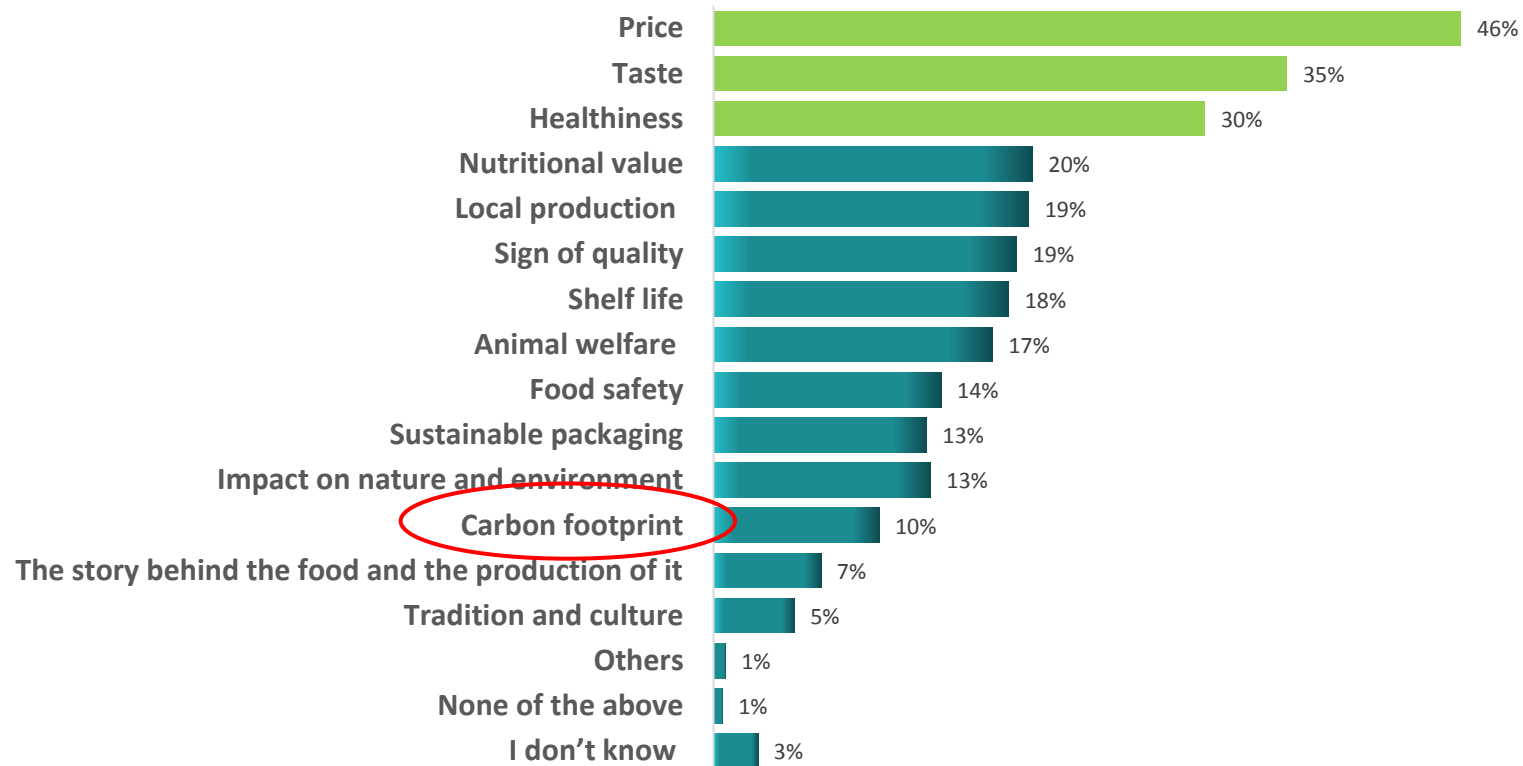


## Ireland



In your opinion who is responsible for creating a more sustainable future?

# Price, taste and health are the most important factors when buying food

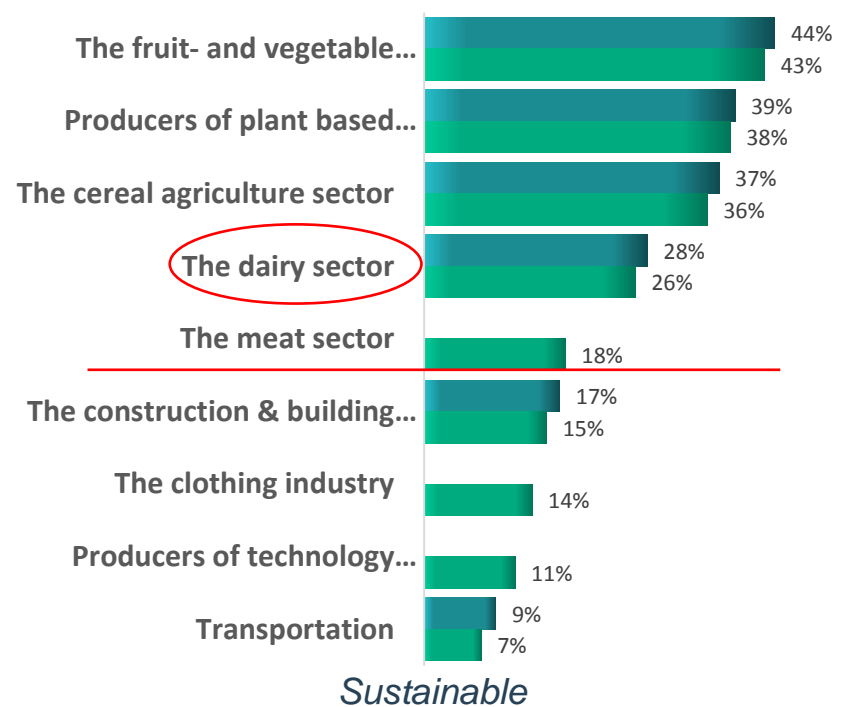
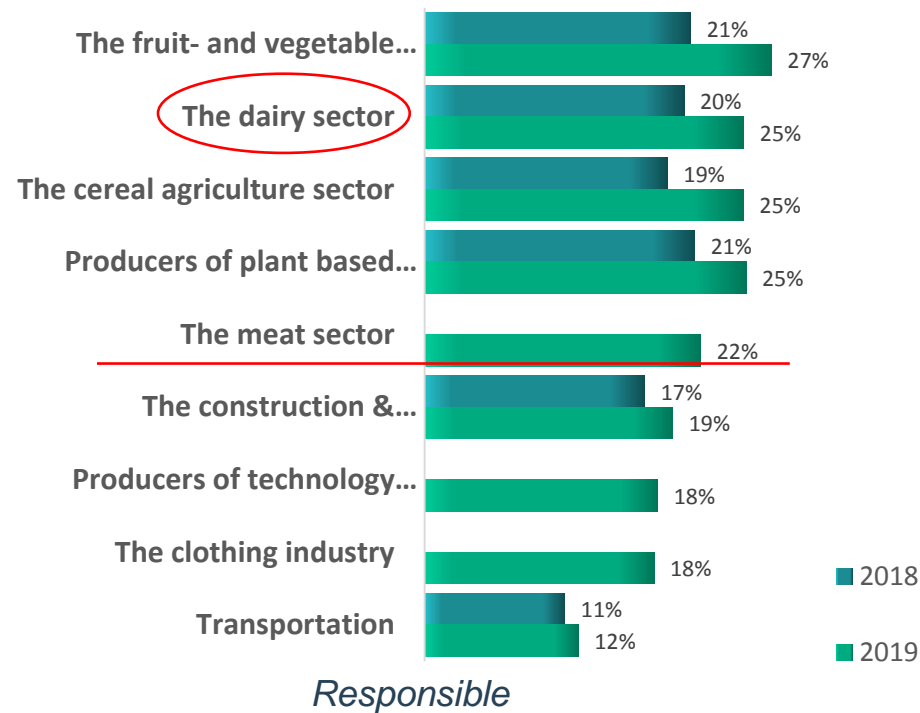


When purchasing food, what do you value the most

# Dairy Sector Reputation

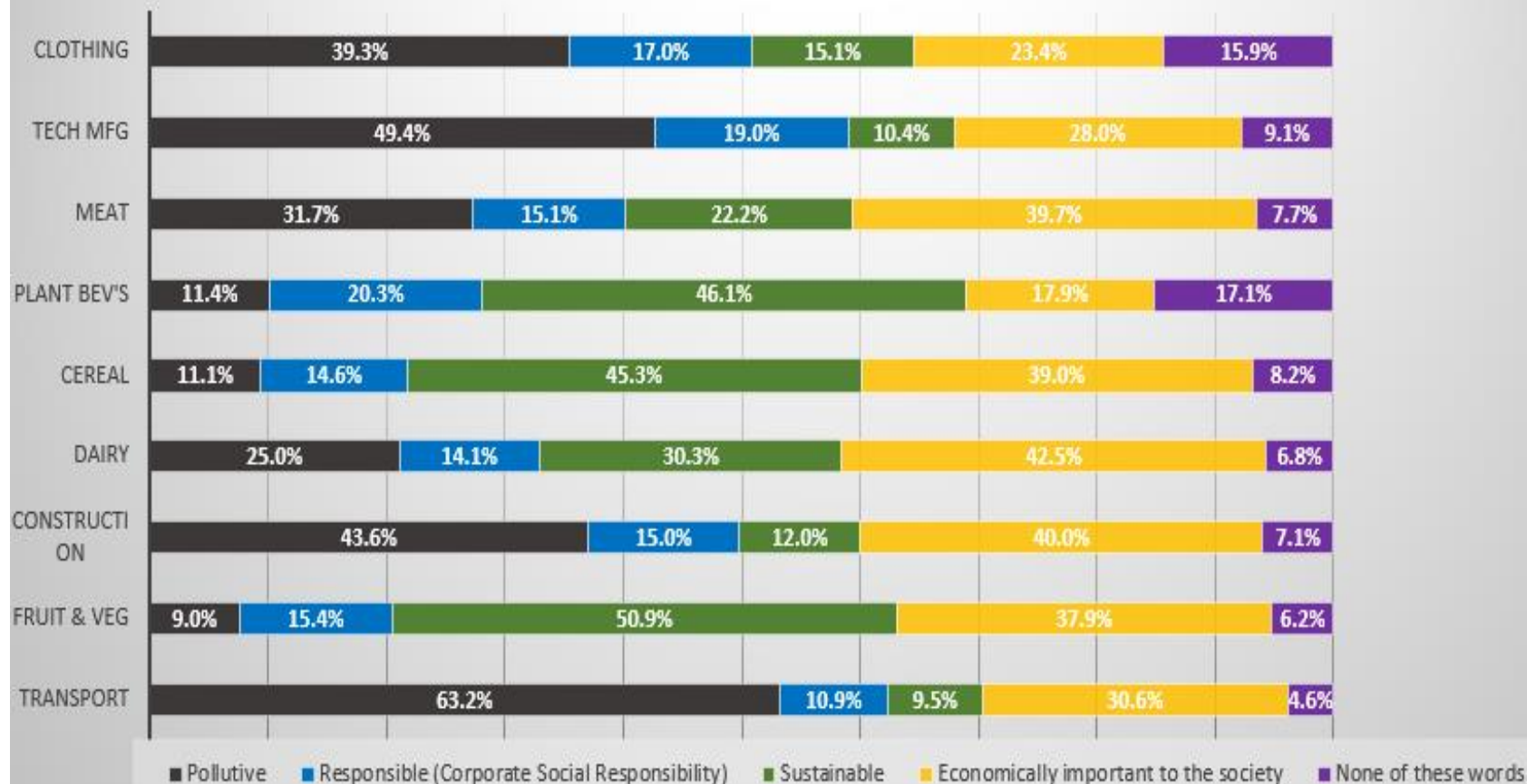
# The food sectors are perceived as responsible and sustainable

- And the non-animal food sectors are perceived as more sustainable/responsible than animal food sectors



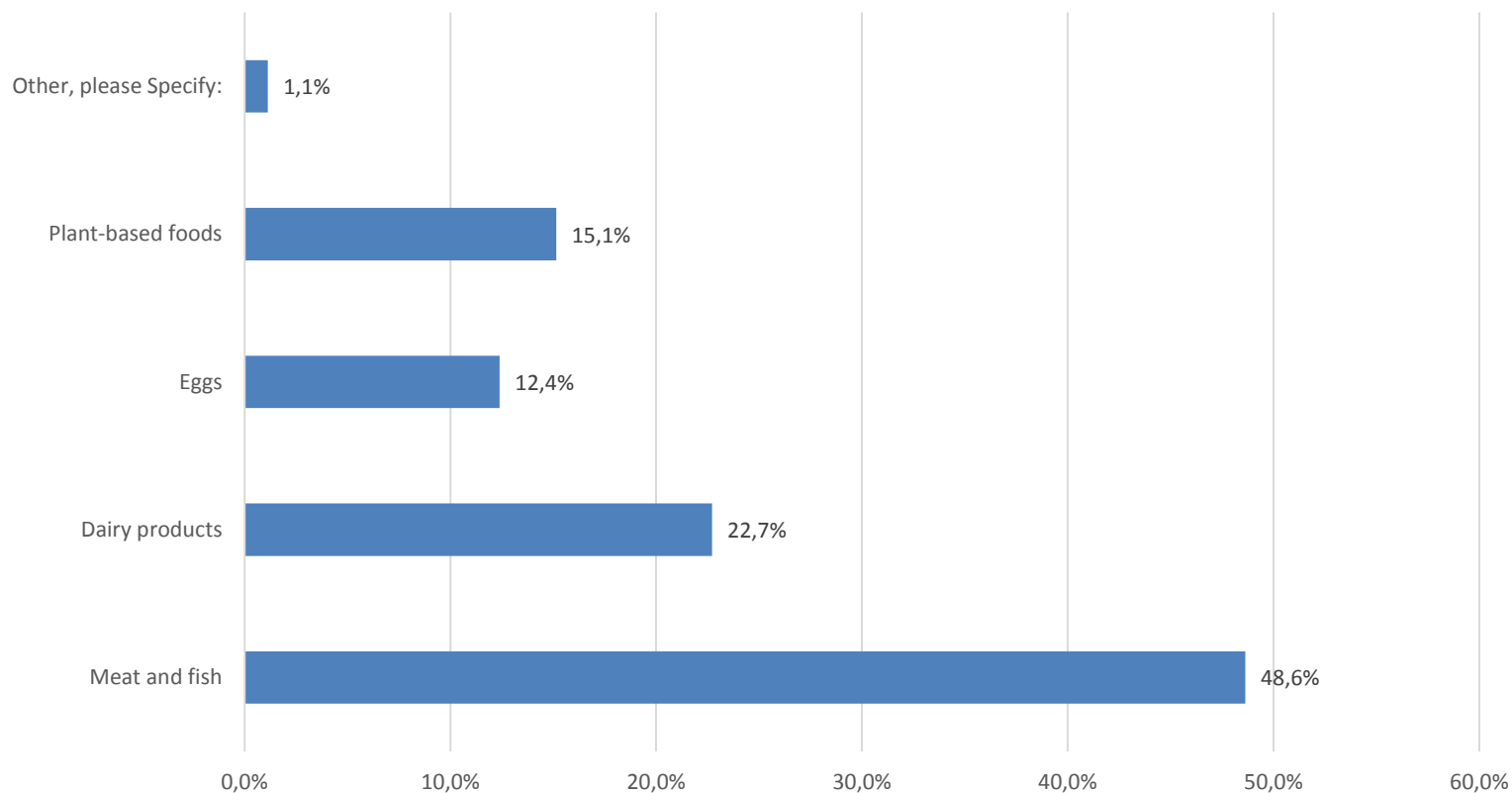
# Irish Consumer's view by Sector?

## Environmental Impact by Sector



# Category Deprivation- Irish Response

Foods missed most if not available



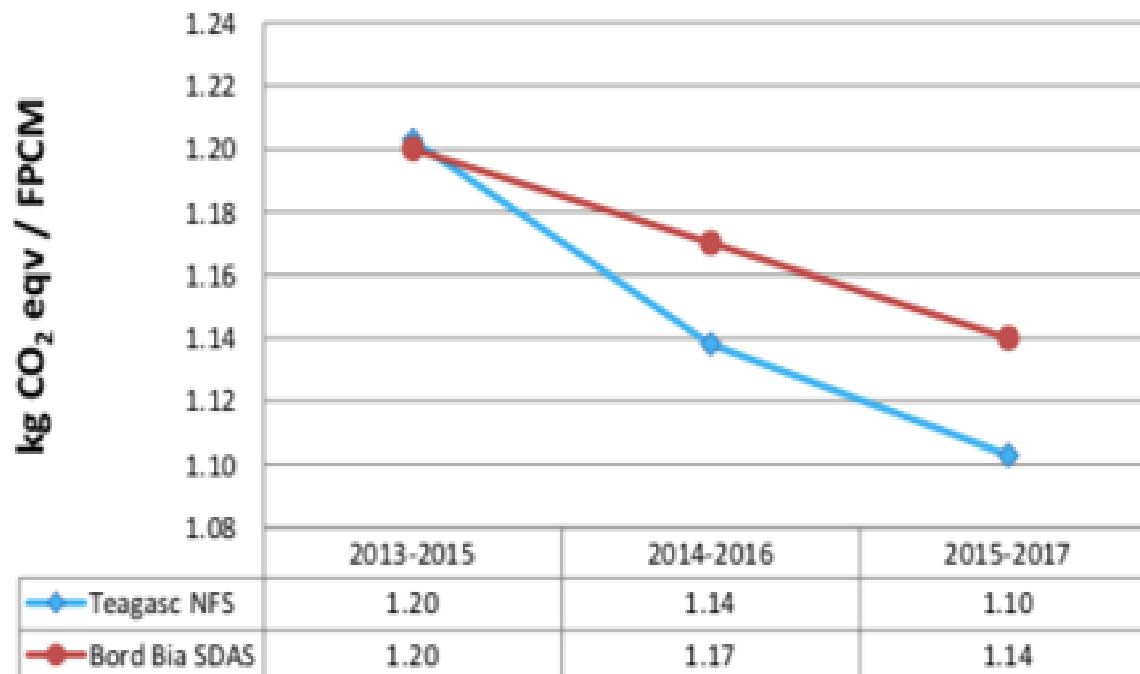


## Grass-based, Family Farmed Goodness



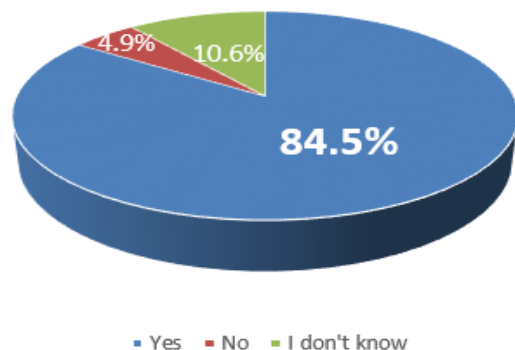
# The Most Carbon Efficient System ...improving with expansion

Figure 133: GHG Emission per kg FPCM (LCA Approach) – 3 year rolling average weighted by milk supply.

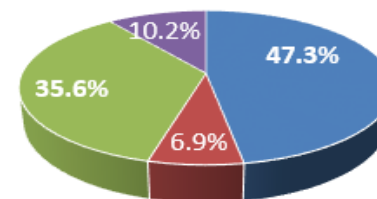


# 85% Consumers want an Irish Dairy Sector for future generations, despite action-plan knowledge gap

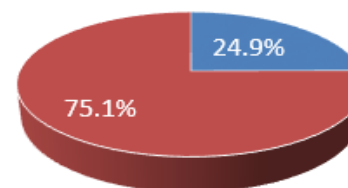
Do you want the Irish Dairy industry to be protected & supported for future generations?



Do you think Irish Dairy is produced authentically & sustainably?



Are you aware of the initiatives taken to enhance sustainability on Irish dairy farms?



# Purposeful Dairy Category



## In summary:

Irish Dairy is uniquely produced on a grass-based, family farm model which is sustainable in the long term. It produces a highly nutritious product portfolio which is purchased by 98% households on a regular basis at an affordable price

## Pivotal Question:

How can the Category deliver more for both the consumer & retailer, leveraging the attributes (Health, Climate & Animal Welfare) that Irish consumer cares about?

## Purposeful Category Development:

- What if the Dairy fixture celebrated its Climate friendly credential?
- What if the Category stopped using Milk as a loss leader?
- What if the nutrition benefit was highlighted & underpinned by a stronger pricing structure which reflects dairy's role in population health?
- What if the consumer could engage with Ireland's dairy producers?



**Thank You!**