

TETRA PAK DAIRY INDEX
AN ANNUAL NEWS AND INFORMATION SOURCE
ABOUT THE DAIRY INDUSTRY

ISSUE 8 / JUNE 2015

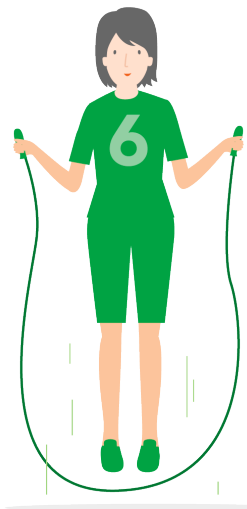


REVITALISING DAIRY

THE NEW GOOD OF MILK



In a world where consumers are increasingly focused on health and wellness, milk is as relevant today as it ever was. A new international study commissioned by Tetra Pak shows that consumers in both developed and developing markets still have an overwhelmingly positive view of milk (see page 05), despite occasional anti-milk messages.



Although this study also shows that many consumers are aware of the debates about milk, they express no doubt about its goodness – a word that still very much captures what might be called the “brand promise” of dairy. In the face of food fashion and faddism that focuses increasingly on cutting things out – and appears to define us by what we don’t eat as much as what we do – faith in the goodness of milk endures.

Perhaps that shouldn’t be surprising. Decades of proven scientific research show that milk provides energy and nutrition that’s hard to replace. And every year, new studies add to our understanding of milk’s remarkable health and nutritional benefits.

And there is more to the role milk can play in modern life. Today’s consumers live ever busier, more complex lives. And while this may mean that many increasingly skip breakfast, a prime consumption occasion in many developed markets, it creates plenty more on-the-go opportunities for this versatile liquid food.

Meanwhile, developing markets are eagerly embracing dairy products, helping drive global demand to record highs. Here brand owners are thriving through innovation, designing products that meet consumer needs in markets where there may well be no dairy tradition at all, with categories being created almost from scratch in just a few generations.

That innovation is inspiring. It offers an excellent reference point for developed markets, where dairy’s lustre may have been dulled by sheer familiarity; and where the industry perhaps needs to believe in milk again. Clearly, there are major challenges in these markets, where milk consumption today is at an all-time low. But here, too, companies are recognising the importance of fresh thinking: the need to come up with new flavours, new combinations of ingredients, new looks, new names and new approaches for their products.

Such companies see that the consumption dip has nothing to do with consumers not seeing the benefits of milk – rather, it’s because the products available are not sufficiently evolved to meet the modern lifestyle. These companies also see that there are huge opportunities to be seized by those who can successfully bridge this gap. We give plenty of examples of such innovative thinking in action, in developed and developing markets alike, in our Products section (page 10).

Our report also highlights the critical role that marketing and communications must play in supporting this fresh approach. Milk has a good story to tell: a story that is positive, rigorously researched, and scientifically sound. It needs to be heard by opinion formers and consumers alike. But that story must speak not only to the mind, but also to the heart. As we show from page 17, more and more campaigns are successfully connecting with consumers in ways that forge strong emotional bonds, and are helping to make that happen.

In short, the findings of this report suggest that the key to energising dairy in all markets is to make consumers excited by milk; to show that it is convenient, pleasurable, a special treat even, and relevant to all. This is the essence of the “new good” of milk: to demonstrate that this uniquely versatile, convenient, customisable liquid food can reach out to young and old, and to everyone in between, by constantly adapting to meet their ever-changing needs.

DENNIS JÖNSSON
PRESIDENT AND CEO, TETRA PAK

In a fast-moving modern world, milk is as relevant as ever...

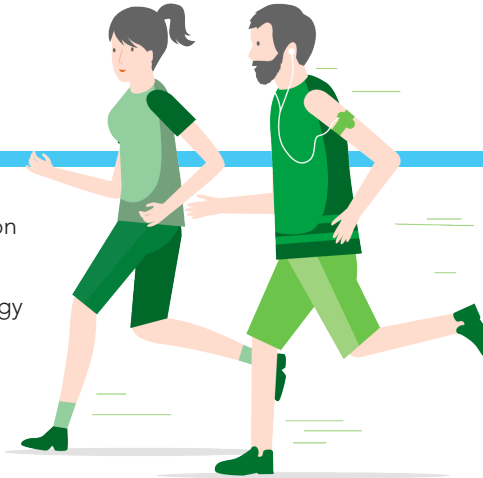
Our new study shows that consumers worldwide have an overwhelmingly positive view of milk.



Consumers think milk is a good source of calcium, nutritious, healthy and tasty.



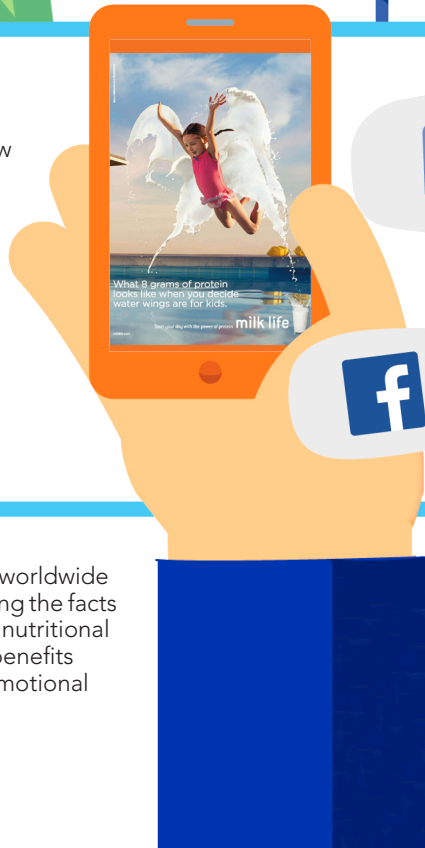
Milk's enduring reputation for goodness is founded on decades of research showing it provides energy and nutrition that's hard to replace.



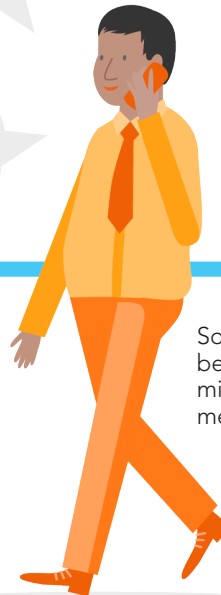
And every year new studies add to our understanding of its health benefits.

Goodness is still a powerful platform. But it's not enough on its own. Modern consumers want exciting new beverages that meet their changing needs, that deliver maximum health benefits, that fit into their pace of life, and more. Trends include...

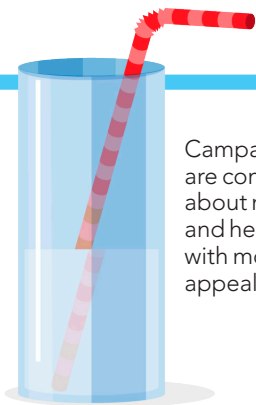
- Permissible Treats
- Personalised Products
- Made for Modern Life
- The Natural Choice



It's also important to find new, more relevant ways of communicating.



Campaigns worldwide are combining the facts about milk's nutritional and health benefits with more emotional appeals.



Social media is also being used to spread milk's many positive messages.



The key to energising dairy is to make consumers excited by milk: to reach out to young and old alike to show that it can constantly adapt to meet their ever-changing needs.



REVITALISING DAIRY
WHAT CONSUMERS BELIEVE

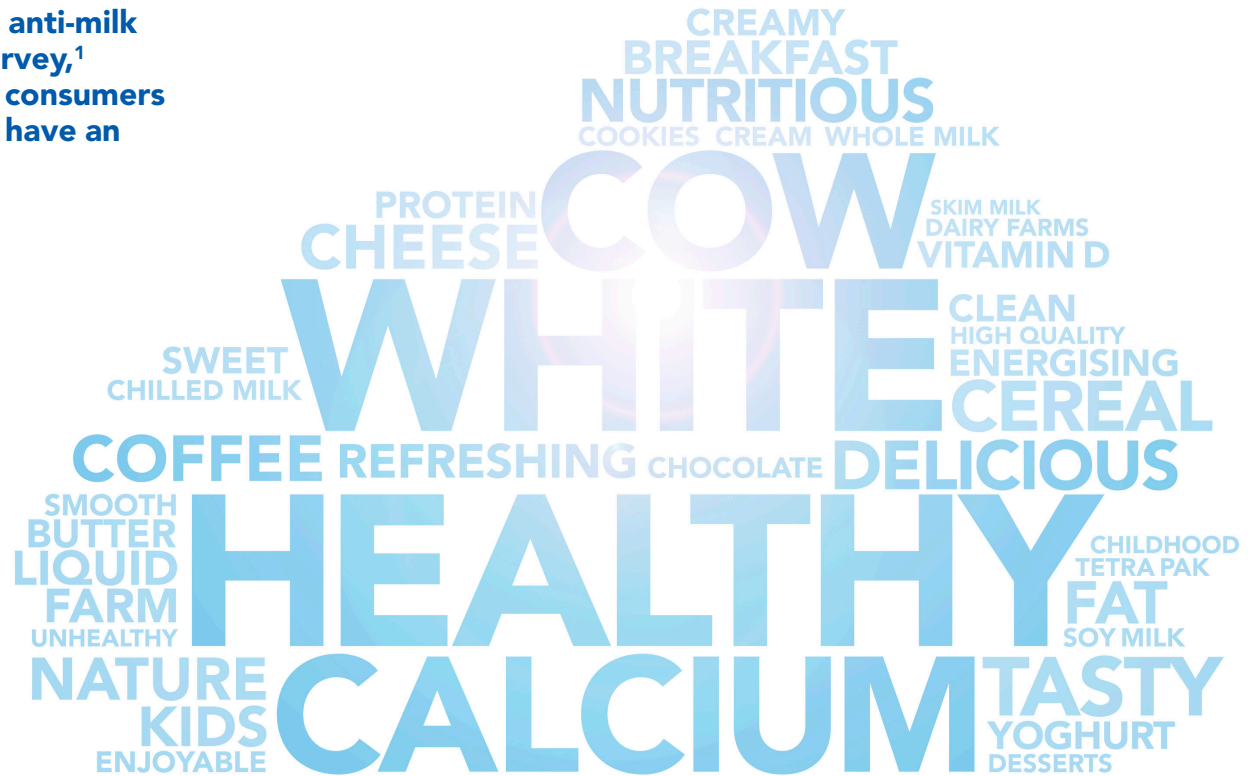
Although the dairy industry has concerns about anti-milk messaging, a new international “milk image” survey,¹ commissioned by Tetra Pak in 2015, shows that consumers in both developed and developing markets still have an overwhelmingly positive view of milk.

“Healthy”, “nutritious”, “refreshing” and “delicious” are just a few of the most popular associations with the word “milk” made by consumers around the world. Healthy benefits are spontaneously associated with milk by 43% of respondents worldwide, spiking to 70% in China where it is seen as particularly nutritious.

The main reason given globally for drinking milk is that it is a good source of calcium (90% agree) and that it is nutritious (90%), healthy (90%) and tasty (89%). While the emphasis may vary slightly from country to country, these “milk truths” are held as strong beliefs around the world.

Respondents to the survey drink milk on average five days a week, with breakfast being the most popular consumption occasion. Milk is most often drunk at home and is usually purchased at supermarkets or hypermarkets.

When asked if they could think of any disadvantages or concerns associated with milk, the majority (61% overall) could think of none at all. For the rest, lactose intolerance – a real problem for some (8% cited it overall), but one that is easily overcome (see page 08) – is the main concern.² This is in spite of the fact that 63% were aware of the debates about the goodness of milk for human health.



The spontaneous associations with milk by survey respondents were strongly positive.



BELIEFS AND MYTHS

Respondents were almost equally familiar with the common anti-milk myths: for example, that adults should not drink milk as it does not suit their nutritional needs or that milk contains pregnancy hormones from cows. Not surprisingly, perhaps, respondents said they heard about the debates mainly from the internet and word of mouth, with the internet registering a particularly high percentage in developing markets such as China (79%) and Thailand (65%).

However, after covering these issues, 82% still expressed no doubts about the goodness of milk and 84% said they planned to continue consuming milk as normal. Overall, 31% don't believe the negative stories at all and another 52% believe that any negatives are likely down to overconsumption.



CONSUMER MOTIVATIONS

What would bring people back to milk?

- More calcium
- More protein
- Make it all natural
- Make it really digestible
- New flavours
- Different smell

STOPPING AND RESTARTING

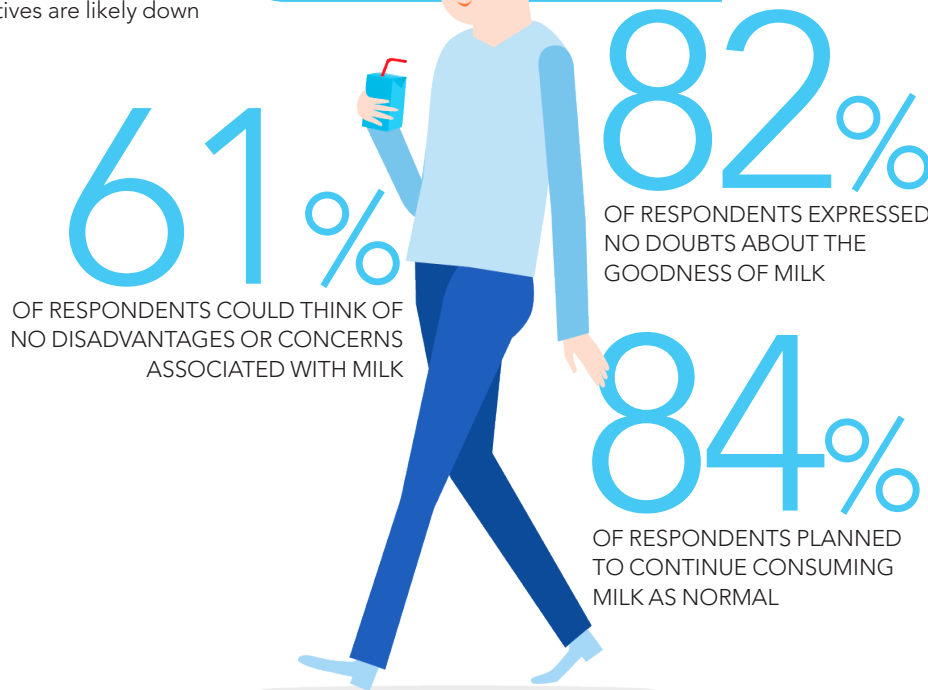
Even among those who said they no longer drink milk, two-thirds were not concerned by the debates – they dropped milk drinking due to other issues. The average age at which they had given up milk was 28 years. The main motivations cited were that they changed habits for no particular reason (27%) or that they no longer liked the taste (26%).

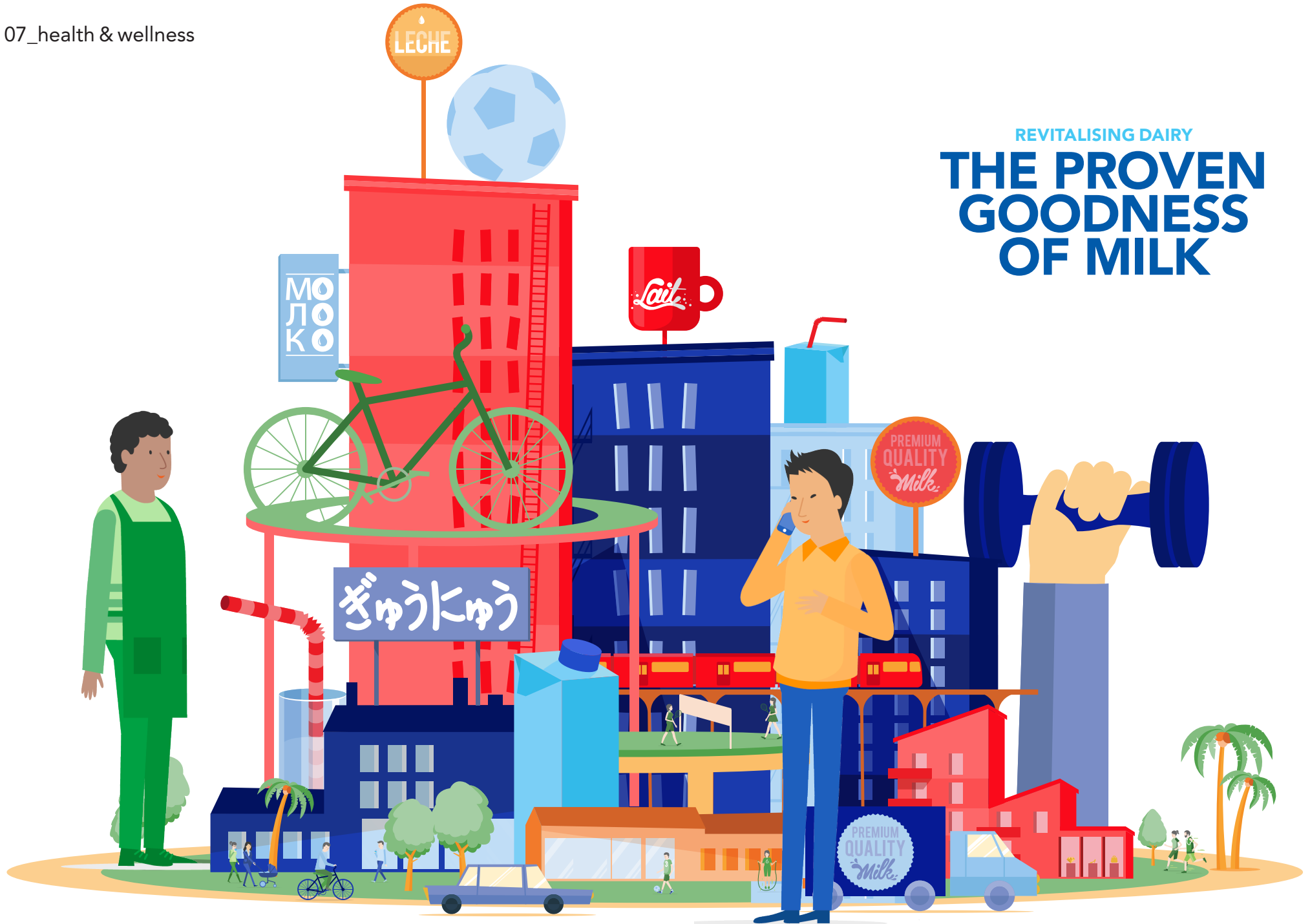
The factor most likely to cause respondents to consume more milk (and to encourage non-milk drinkers to start again) was if it contained extra calcium, proving again just how much milk is valued for its nutrients.

GLOBAL VARIATIONS

Of course, there are local nuances in the way milk is perceived. In developing countries it tends to be thought of as a food, valued for its nutritional value above all, whereas in more mature markets milk is often associated first with taste and refreshment.³ The most popular type of milk may depend on cultural and environmental factors and varies from country to country, but plain white full-fat milk remains most popular overall.⁴ In China and Southeast Asia milk is seen as a healthy addition to the local diet, whereas in more mature markets it is generally viewed as a traditional drink,⁵ often with strong associations to childhood and home.

Milk's nutritional value for children holds true everywhere, but is particularly valued in the developing world. In general, in developed countries milk is consumed by all ages, but consumption often peaks in childhood, sometimes with another upturn in later life.⁶





REVITALISING DAIRY
**THE PROVEN
GOODNESS
OF MILK**

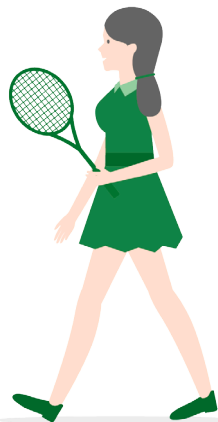
The modern consumer's continuing strong belief in milk's goodness is perhaps not surprising. It is founded on decades of proven research showing milk provides energy and nutrition that's hard to replace. And every year new studies add to our understanding of its health benefits.

THE UNIVERSAL TRUTHS ABOUT MILK⁷

- Milk is a nutritionally dense food containing a range of nutrients that are only found together naturally in dairy sources.
- Milk is high in calcium and other nutrients required to build strong bones and teeth (including phosphorus and potassium).
- Milk contains high-quality protein, which is needed to build and maintain muscle.
- Milk contains nutrients and micronutrients that are essential to health and play a role in nerve and muscle function, energy release, vision, blood clotting and red cell formation, digestion, blood pressure, skin health, the immune system, psychological function and growth.

THE MILK MATRIX EFFECT

It's possible to get all the nutrients found in milk from other foodstuffs, but it's not always easy to do so, and it seems that there is something special about milk's nutritional package. Milk is a complex food and the active health benefits of the individual nutrients it contains seem to be greater when combined together in milk than if they come from a variety of sources – this is the “milk matrix effect”. For example, the effects of milk on bone health may be partly due to positive interactions of calcium, protein and phosphorus with each other and with lactose and bioactive peptides during the digestive process, rather than simply a “calcium effect”, as previously assumed.



“Milk and dairy products are excellent food sources of dietary calcium, a mineral that has been linked to the prevention and treatment of hypertension, obesity and osteoporosis. Dairy products also act in the prevention of dental caries, metabolic syndrome, cardiovascular disease, type 2 diabetes mellitus, kidney stones and the development of certain cancers (colon and breast). Milk consumption is also proven to be beneficial to the practice of sports.”

RAFAEL CORNES, FEPALE
(THE PAN-AMERICAN DAIRY FEDERATION)

MILK AND NUTRITION FAQs

Do adults need milk in their diet?

Most guidelines recommend milk and dairy products as part of a healthy diet. According to the Food and Agriculture Organisation (FAO) of the UN, “milk and dairy products are nutrient dense and provide high-quality protein and nutrients in an easily absorbed form that can benefit both nutritionally vulnerable people and healthy people when consumed in appropriate amounts.”⁸

What is lactose intolerance?

Some people find milk hard to digest. This is because their body does not produce enough of the enzyme lactase, which is needed to digest the lactose that milk contains. Such lactose intolerance can develop in children after weaning or can sometimes affect people in later life as their lactase production decreases. Lactose intolerance in babies is extremely rare. Rates of such lactose intolerance

differ significantly between different ethnic groups and areas. However, now that lactose-free products are widely available, lactose intolerance is no longer a barrier to enjoying the health benefits of milk.

What is the recommended amount of milk to drink per day?

There are no global recommendations for milk and dairy consumption, but most countries have national guidelines. These are based on a variety of factors such as the composition of the local diet and can vary quite widely. Most countries recommend one to three servings per day.⁹

Can I get the same nutrients from other sources?

Yes. But as the FAO notes: “the bioavailability of some nutrients in milk, such as calcium, for example, is high compared with that in other foods in the diet”,¹⁰ which means you may need to consume a greater amount of calcium from other

sources in order to get the same effects. Non-dairy (vegetable protein) drinks are often less nutritious than milk so you need to consume a much larger quantity (or get key nutrients from another source) if you intend to use them to replace milk in your diet.



THE HEALTH BENEFITS OF MILK

- **Milk and weight control.** There is growing scientific evidence that milk and dairy foods may have a role in weight control for all ages, and that those trying to lose weight should not reduce their milk intake but should in fact increase it when reducing calories from other sources. In addition, the well-known benefits of calcium and protein in terms of maintaining bone and muscle mass make milk a particularly valuable part of the diet during a weight-loss regime.
- **Milk and protection against cardiovascular disease.** Despite some myths, the fact is that

there is no proof regarding the association of milk with heart disease – indeed in some cases milk helps reduce the risk of heart disease, regardless of its fat content.

- **Milk and blood pressure.** Low-fat dairy products (at around three servings a day) are a component of the DASH (Dietary Approaches to Stop Hypertension) diet, which is widely promoted in the USA for the prevention and treatment of high blood pressure. Studies have linked blood pressure-lowering effects to bioactive peptides produced in the digestion of milk, as well as to the vitamin B (riboflavin) and minerals

it contains. It seems most likely that these effects are the result of the interactions between nutrients in the milk matrix effect.

- **Milk and the prevention of type 2 diabetes.** A number of studies have shown that milk and dairy products can help reduce the risk of developing type 2 diabetes. It is not yet clear which nutrients are responsible but calcium, magnesium, whey protein, bioactive peptides, fatty acids and vitamin K could all play a part, as could the interactions between them.

HELPING HEALTHY GROWTH

The health benefits of consuming milk are fundamental to school feeding programmes. For more than 50 years, Tetra Pak has supported governments and dairy processors to develop and implement school milk programmes all over the world. By receiving milk on a daily or regular basis, children in need of proper nutrition have shown remarkable health improvements.

A health study undertaken in 2012 in Sudan¹¹ showed that the stunting (impaired growth) rate¹² was reduced from 11% to 5% after six months. The study also showed improved academic performance. The mean IQ score increased from 92.4 to 111.5.

Another recent example of improved health thanks to school milk are early indications¹³ from a school milk programme in Myanmar where seven-year-old girls have grown 5.9cm in eight months after consuming milk five days per week, compared with 1.7cm for non-participants.

THE ROLE OF MILK PROTEIN

Protein, a natural part of the milk matrix, has become a nutritional buzzword in recent years. Scientifically backed claims for protein's role in weight loss (because it keeps you feeling fuller for longer) and fitness (because it helps recovery after exercise) are now widely accepted – so much so that 20% of dairy consumers give priority to the claim "high protein" when choosing food and drink products.¹⁴

Milk contains a particularly high-quality protein (80% casein and 20% whey) that provides all the essential amino acids for muscle synthesis and repair. This, combined with milk's fluid and electrolyte content for rehydration, makes it the perfect post-exercise drink. Milk protein can also play a role in maintaining the muscle mass of older people and there is evidence to suggest that older people with higher levels of milk consumption also have improved strength and mobility.¹⁵

"Milk is rich in calcium and drinking it regularly is certainly good for bone health. A school milk programme in China resulted in measurable improvements in 10-year-old girls' height and bone density, so an increase in milk consumption could improve bone health during adolescence, particularly where calcium intake and vitamin D status are low."

PROFESSOR GUANSHENG MA, PHD, SCHOOL OF PUBLIC HEALTH, PEKING UNIVERSITY





The strong belief in milk’s goodness is a powerful platform. But traditional products are not enough for many consumers today: they want beverages that deliver maximum health benefits and that fit into their pace of life. Brands worldwide are already showing that there are huge opportunities for innovative new products that meet these changing needs.

In some advanced markets dairy consumption per capita is at an all-time low, but the overall global market is still expanding, mainly due to strong growth in the developing world.¹⁶ Understanding and delivering exactly what consumers want, and knowing how best to reach them, can help the dairy industry to maximise performance in all markets.

Based on Tetra Pak Consumer Intelligence analysis, the two overwhelming trends influencing consumer choices in food and drink are:

- the desire for optimum health and wellness
- increasingly busy, complex lifestyles.

These are not new: they are long-term megatrends that continue to strengthen and evolve, creating new opportunities in the market as consumer expectations increase.

FEATURES	% OF CONSUMERS “VERY WILLING” TO PAY MORE ²⁰
• All natural	39%
• High in fibre	36%
• GMO-free	33%
• High in protein	28%
• Vitamin or mineral fortified	27.5%
• Low sugar/sugar free	26%
• Low/no fat	26%



THE DESIRE FOR HEALTH AND WELLNESS

The biggest global trend is towards food and drink products that offer health and wellness benefits. This influences almost everything that happens in the sector and is resulting in a range of new products differentiated by health benefits designed to meet the needs of specific groups.

A recent Tetra Pak Consumer Intelligence study found that more and more consumers are reading the labels when purchasing food and beverages. 63% of them say that they are looking for ingredient information, and 55% of them want to see if they “have the nutrients that keep you healthy”.

As shown in the list below, many consumers are “very willing” to pay more for foodstuffs with health benefits: almost 40% for foodstuffs that are “all natural”, over 30% for “high in fibre” and “GMO-free”, and more than 25% for each of the other features such as “high in protein”, “vitamin or mineral fortified”, “low sugar or sugar free” and “low or no fat”.

Younger consumers and those from developing markets are most willing to pay a higher price for health benefits, but this is an important market segment everywhere.¹⁷

BUSY COMPLEX LIFESTYLES

The second key trend is that consumers’ lives are becoming ever more complex and fast-paced thanks to always-on connectivity; longer, more fluid work hours; longer commutes; more leisure activities; dual parental employment and more. As a result, traditional meals and patterns of consumption are under pressure. Globally, 73% snack outside of mealtimes,¹⁸ sometimes replacing the meal itself, creating opportunities for new products that are both convenient and nutritionally balanced.

Breakfast replacement is a particularly strong opportunity as it is the meal most often skipped. A survey by the NPD Group found that 31 million Americans, about 10% of the USA population, do not eat breakfast.¹⁹ Yet breakfast is widely recognised by nutritionists and consumers alike as the most important meal of a day.

MILK AS A SOLUTION

Milk sits at the point where healthy nutrition and convenient drinks and snacks meet. Consumers already believe that milk is good for you. Now they are ready for products that deliver both health and lifestyle benefits in a simple and convenient form.

Protein, for example, is a key nutrient that can give a snack or drink the nutritional value of a meal. Milk’s reputation as a “complete food”, plus the fact that it is naturally rich in high-quality protein, gives it a head start when it comes to developing convenient, yet healthy, solutions for time-poor consumers.

The best new products respond to consumer demand for health benefits and convenience in an innovative way. We have identified four key product trends, as discussed on the following pages.

1 INDULGENCE

PERMISSIBLE TREATS

A healthy diet, like a healthy life, should be enjoyable. Consumers are working harder than ever and try to live a healthy lifestyle. But they also want – and feel they deserve – to indulge or pamper themselves (and their children) on a regular basis. Food and drink experiences are a big part of this.

Milk can carry a range of rich flavours and has an inherently creamy taste and texture, and yet it retains the association of natural goodness, making it the perfect basis for a moment of permissible but delicious indulgence.



2 MILK 2.0

PERSONALISED PRODUCTS

Milk can now be customised in a range of ways. For some consumers, “less is more”, and so manufacturers offer products without or with less fat, or without or with less lactose, making the nutrition in milk available to people who previously couldn’t digest it.

In the most successful cases, Milk 2.0 refers to a clearly differentiated product that commands a premium price, serves a niche market and, where possible, also expands the general market. It often shares attributes with the Designer Dairy category.

Because of the level of segmentation and specialisation required, these products often work well in a family or portfolio of products, where a strong brand offers a range of value-added milk options to meet the needs of consumers at various life stages and with differing health/nutritional needs.

3 DESIGNER DAIRY

MADE FOR MODERN LIFE

Breakfast isn’t what it used to be. And nor are lunch or dinner. Busy, time-poor consumers are increasingly eating alone, on the go and between meals, often outside the home. There is a clear opportunity to market nutritious protein-enriched meal replacement products to fill the gaps that traditional snacks can’t quite satisfy.

This is generally a market for niche premium products, tailored and marketed to specific consumer segments.

4 PURE MILK

THE NATURAL CHOICE

This relates closely to the “yearning for simplicity”, a sentiment seen most in advanced markets but also increasingly in the developing world, that may combine a nostalgic view of milk with environmental and health concerns. The obvious product here is white milk with an organic or GMO-free claim, but other milk products, particularly in younger markets, reference this trend when they carry strong associations with and/or are marketed based on environmental or “natural” values.



There are great opportunities for milk products that meet the evolving needs of today's consumer. The following examples, drawn from around the world, each focus on a precisely defined market segment that may well fall at the intersection of several trends. In some cases, these products do more than fill a niche: their offering has the feeling of a bespoke product, tailor-made for its target consumers.



YILI – SHUHUA LACTOSE-FREE MILK RANGE
CHINA

Yili was a pioneer in leveraging the world's largest lactose-intolerant population when it launched ShuHua, China's first lactose-reduced milk, in 2007. Using the patented LHT (Lactozym Hydrolysis Technology) process, Yili was able to reduce lactose content by 95% and create the smooth sweet taste that is vital for the Chinese market. The range has subsequently become completely lactose free.

Yili has worked hard to build brand recognition and trust and to maintain ShuHua's position. A science/nutrition-based narrative was first used to explain and sell the benefits of LHT technology. For the Chinese population, reduced lactose means better absorption of milk's nutrients. The brand established authority in this area with recommendations from five respected nutrition organisations and has since become an award-winning lactose-free milk range.

Yili built up a sense of trust around the platform of "easy to absorb nutrition" and used endorsements

from Olympic athletes to reinforce the value proposition. It has continued to strengthen the brand with promotion and product placement activity (in the *Transformers 3* and *4* films, for example) and local celebrity endorsements.

As the lactose-reduced/lactose-free market has grown in China, Yili has segmented the ShuHua range to appeal beyond its initial market of young, affluent urban consumers and is also targeting seniors with calcium-enriched and heart protective milks.

IN BRIEF

A pioneering product in the market, now established as a premium/functional no-lactose range with segmentation based on age/health and wellness needs.

TRENDS ADDRESSED
MILK 2.0



NESTLÉ – CHUCKIE CHOCOLATE FLAVOURED MILK
THE PHILIPPINES

Nestlé Chuckie chocolate milk drink is positioned as a high-quality flavoured milk for children in the Philippines – a nutritious and delicious "chocolate buddy". The brand is trusted in the region and mothers value its active ingredient "Calci-N". Consumers in the Philippines generally view flavoured milk as being as nutritious as white milk.

However, the ready-to-drink kids' chocolate milk market is dynamic and competitive, and with new entrants in 2014 Nestlé wanted to stand out. The "Joys of childhood" campaign targeted mums, highlighting their desire to make kids actively happy by giving them the most enjoyable drink experience. The campaign ran in mass media and digital and included in-store promotions and special offers on the small portion packs to increase frequency of consumption.

To appeal to children's love of novelty, the campaign included an inflatable playground that toured the country and, on a smaller scale, fun packaging that can be converted to toys. Nestlé also launched limited edition white chocolate and choco-strawberry flavours.

Nestlé Chuckie continues to grow and remains a market leader in flavoured milk.

IN BRIEF

A strong brand continues to develop its identity and use innovative marketing to ensure it remains highly visible and extends its appeal and distribution in an evolving market.

TRENDS ADDRESSED
INDULGENCE
MILK 2.0



14_products

GLANBIA – AVONMORE PROTEIN MILK IRELAND

Avonmore is one of Ireland's largest food brands. Protein Milk is one example from a family of segmented milk and dairy products for a wide variety of health and life-stage needs.

It contains 50% extra milk protein (a combination of casein and whey) and is marketed primarily to health-conscious active consumers: "So you'll be ready for any challenge that comes your way, on or off the pitch." It is framed as a lifestyle drink to be consumed with any meal or as a snack, rather than specifically as a post-exercise drink, which increases the range of possible consumption occasions. Its key innovations are:

- a particularly high level of protein (25g in a 500ml glass of milk) with added vitamin D
- direct high-profile sponsorship with the Gaelic Athletic Association Sports (Ireland's biggest sporting body) and a number of sporting brand ambassadors
- leverage on the "natural" composition of milk and milk protein in a country with a strong emotional attachment to milk and dairy.

Avonmore has also invested in a system that enables products to be ordered online for delivery by the milkman. Families can order a range of milks tailored to the needs of individual members, where once they might have ordered plain milk for all and used alternative supplements.

IN BRIEF

A highly targeted protein-enriched chilled white milk for sports lovers who will pay extra for functional benefits. One of a range of premium segmented milks from the Avonmore "family", all of which can be ordered online for delivery.

TRENDS ADDRESSED: DESIGNER DAIRY

JUHAYNA – 0% FAT MILK EGYPT

Juhayna is a zero-fat ambient white milk aimed squarely at the women's fitness/weight-loss sector. Launched in June 2013, Juhayna meets the growing demand for products that are totally free of fat but packed with nutrients.

With its "Don't skim, stay fit" campaign, Juhayna clearly differentiates itself from its competitors. There are other skimmed milk options (0.4% fat) but Juhayna is the only "zero milk" (0.04% fat) available in the market in Egypt. It provides a unique product offering and positions itself as the perfect choice for those wishing to maintain a healthy active body.

Although the brand is Egyptian, it reflects a global awareness of health and beauty and conveys an international feel in its digital and TV ad campaigns, all of which focus on women's fitness. The brand has a strong social media presence with over 170,000 likes on its Facebook pages, for example, where it offers fitness tips and recipes.

IN BRIEF

A fat-free ambient milk positioned as an aspirational lifestyle product for women seeking a fit and healthy body and lifestyle.

TRENDS ADDRESSED MILK 2.0

LALA – SEGMENTED MILK RANGE MEXICO

Lala wanted to explore the market beyond chilled white milk. It did this in three stages by:

- launching a standard UHT range to penetrate the UHT market
- launching a UHT value-added range with a variety of fortified milks for all age groups
- developing a range of products for Mexico's growing lactose-intolerant population.

Lala's UHT milk products represent an important market share and are intended to increase their customer base in Mexico. When the company decided to diversify the range, it targeted research on generating new products with

health and wellness positioning and functional benefits. It has successfully created a wide portfolio, gaining presence in every niche. Its value-added products are priced at an average 5% above regular Lala UHT milk.

In addition to regular full-cream, semi-skimmed and skimmed UHT milk, Lala now offers three value-added lactose-free varieties (Fiber, Silhouette and Extra-Calcium) to cater for the whole family, representing a 2% volume contribution to the range.

Lala's most recent strategy is strongly focused on lactose-free fortified options, as research shows that lactose-free consumers are more receptive to value-added milk in general. With the expanded range came a packaging redesign to make the product line more appealing and to show the and benefits of each product more clearly.

IN BRIEF

Lala is a clear example of a brand that provides milk for the whole family, expanding the market with a growing value-added range that targets different health needs, including lactose-free.

TRENDS ADDRESSED MILK 2.0



15_products

PIRACANJUBA FLAVOURED MILK WITH CEREALS AND GRAINS BRAZIL

Piracanjuba is a long-established brand, well known in Brazil for dairy products and a key player in the flavoured milk category for kids. In May 2011 it began to expand its range in order to extend flavoured milk consumption to young adults. The first stage was to add small, protein-rich grains for texture. This resulted in the flaxseed, amaranth and chia range, which combined these healthful grains with luxurious flavours such as dark chocolate and various fruit combinations. This was marketed as a nutritious choice for young adults concerned with feeling and looking healthy. The 200ml size and resealable cap made it suitable for a variety of consumption occasions.



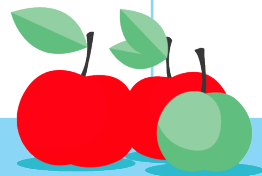
The next stage was to move beyond healthy textured drinks and towards the meal replacement market with the high-fibre quinoa and flaxseed range containing larger grains, again rich in protein, for a more filling snack experience. The health and wellness benefits of the extended adult range are stressed both on the packaging and in the marketing materials. The range has a strong online presence.

IN BRIEF

Flavoured milk is reformulated and repositioned as a healthy/ indulgent drink and breakfast replacement for the profitable young adult sector.

TRENDS ADDRESSED

INDULGENCE
MILK 2.0
DESIGNER DAIRY



MAEIL DAIRIES SANGHA FARM ORGANIC MILK AND FLAVOURED MILK SOUTH KOREA

Maeil Dairies' Sangha Farm range is defining the organic portion pack market in South Korea with its two recent launches marketed to health-conscious mothers. Not only is its flavoured milk the first organic flavoured milk in the market, it is also a new size and package format (Tetra Prisma® Aseptic 125ml). Launched in December 2013 in banana and strawberry flavours as a healthy, tasty and convenient treat for kids, it was well received by mothers for its healthy image and by children for its handy size.

In 2014 the range was expanded to include an organic plain white milk and organic cocoa-flavored milk in the same portion pack. Again, it was the first 125ml organic white milk on the market and its perceived purity and natural goodness are particularly valued by parents of young kids.

IN BRIEF

Organic milk and organic flavoured milk products packaged for children's in-home and on-the-go consumption – the first in the market and positioned as premium products.

TRENDS ADDRESSED

INDULGENCE
PURE MILK



AL AIN DAIRY AL AIN CHILLED WHITE MILK UNITED ARAB EMIRATES

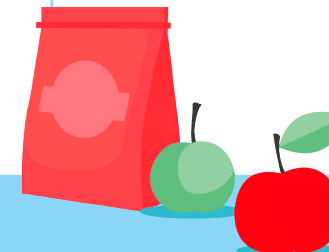
Al Ain Dairy launched a new range of chilled white milks in the United Arab Emirates in February 2014. The product range was simple: low-fat, skimmed, full-fat and added-fat milk in litre and half-litre cartons. Despite this, the Al Ain portfolio has been able to differentiate itself from its competitors by using a unique (to this market) Tetra Top® packaging solution with a screw top, which ensures that, once opened, the milk maintains its fresh taste and avoids any flavour taint. Although the milk is not organic, the product's appeal is based strongly on the idea of increased freshness and purity.

IN BRIEF

A chilled white milk range uniquely packaged for the market to give it full differentiation from the competition.

TRENDS ADDRESSED

MILK 2.0
PURE MILK



16_products

SNEAKZ ORGANIC VEGETABLE-FORTIFIED MILKSHAKE

USA

Sneakz is a flavoured milk in portion packs for children. Its USP is that it contains a half-serving of vegetables "deliciously disguised in every pack". Entrepreneurs Charlie Philp and Allison Fowler saw the opportunity for an innovative product based on the fact that 75% of American children do not eat their daily recommended serving of vegetables. Sneakz contains organic skimmed milk along with carrots, cauliflower, sweet potato, beet and spinach. It is also lower in sugar than other leading chocolate milks.

The appeal for parents who want to improve their children's nutrition is clear, while the flavour and colourful packaging make this a popular product with kids. The original chocolate flavour was launched in 2013, followed by a vanilla version. Sneakz is now widely stocked across the USA and has secured distribution with Whole Foods, Target and Toys "R" Us, among others.

IN BRIEF

A flavoured milk product with added vegetables that targets concerned parents. The first mainstream product in the field, with a huge potential market.

TRENDS ADDRESSED DESIGNER DAIRY

JIMMY'S ICED COFFEE

UK

Ready-to-drink iced coffee is an underdeveloped market in much of Europe, but this is changing. Iced tea has gradually become more mainstream in recent years and iced coffee looks set to follow, with continued growth forecasted.

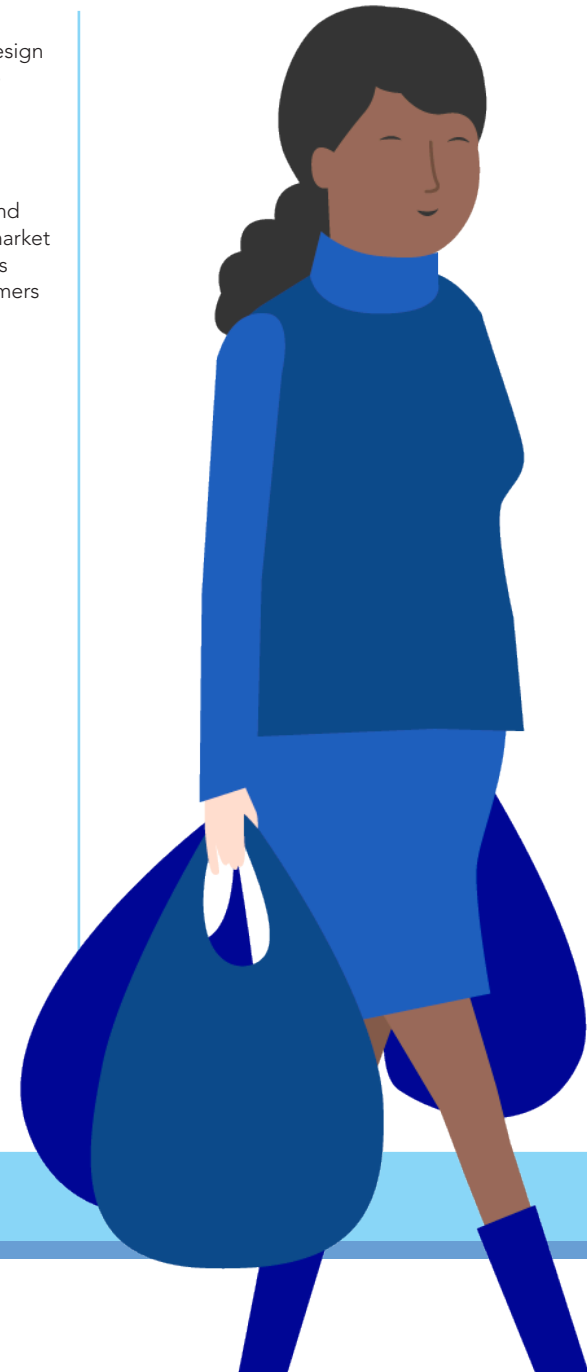
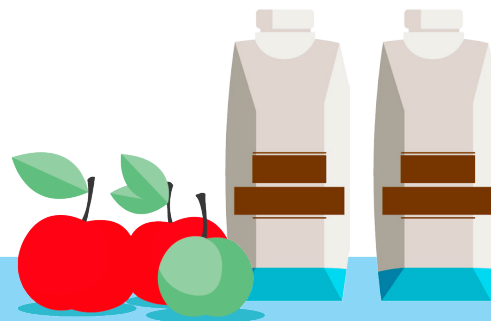
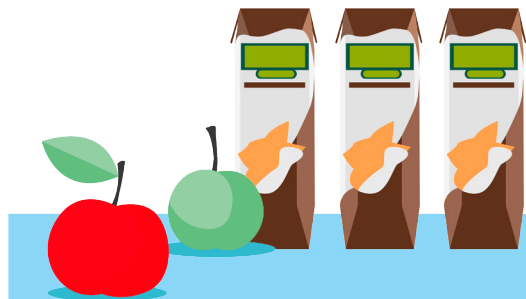
Jimmy's, first launched in the UK in 2011 and in 330ml Tetra Prisma® Aseptic cartons in 2013, uses a strong brand personality (quirky, chatty, hip) and online presence to create a sense of fun and community around an indulgent product

targeting the young adult market. Its eye-catching design and a DreamCap™ closure emphasise its status as a premium product.

IN BRIEF

A "rad and awesome" brand breaks into an untapped market segment in the UK. Jimmy's appeals to younger consumers and has a strong social networking presence.

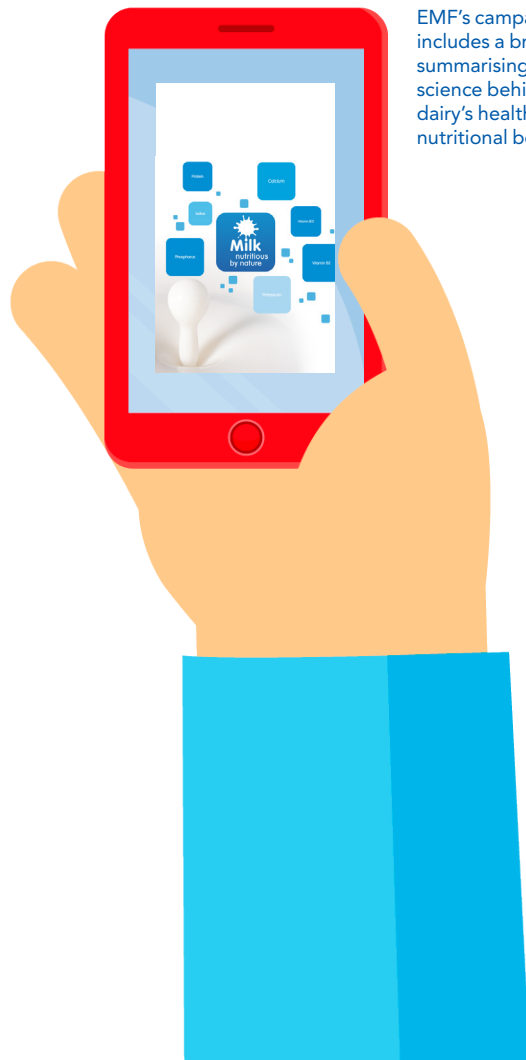
TRENDS ADDRESSED INDULGENCE



REVITALISING DAIRY
**REACHING
OUT**



Innovative new products are only part of the story. It's just as important to find new, more relevant ways of communicating with consumers. Campaigns worldwide are building on the story of milk's goodness, combining the facts of milk's nutritional and health benefits with more emotional appeals. Social media is also being used to spread milk's many positive messages.



EMF's campaign includes a brochure summarising the science behind dairy's health and nutritional benefits.

#1 EUROPE: EUROPEAN MILK FORUM

The European Milk Forum (EMF) was founded in 2011 by seven national dairy organisations – from Austria, Belgium, Denmark, France, Ireland, the Netherlands and Northern Ireland (UK) – to develop information and promotion campaigns on milk and dairy. It was later joined by Norway. It has initiated two pan-European campaigns, which have been running for three years and continue to run today.

The TV adverts had a very positive impact on viewers' perception of milk.



1. MILK, NUTRITIOUS BY NATURE

An information project on the nutrient richness of milk aimed at key opinion leaders, such as high-level scientists, policy makers, health professionals and journalists. It has hosted various symposia across Europe and also produced a brochure that gives an overview of available scientific data, created in collaboration with nutritionists from all of the eight member countries.
www.milknutritiousbynature.eu/en

2. MILK, A FORCE OF NATURE

An advertising campaign targeted directly at consumers – the first on milk to be co-financed by the European Commission. At its core is a stylish TV commercial, broadcast in all eight EMF countries, featuring striking CGI animation of “the knights of milk bringing together nutrients, conveying energy, force and positive power”.

Various additional tools were developed including country-specific websites and localised print advertising targeted at health professionals. Marketing spend was split 90% in traditional communication and 10% in digital, which was particularly important in reaching the youth market. As Laurent Damiens, EMF Chairman and Communications Director at CNIEL, puts it: “Not only teenagers are on digital – but teenagers are mostly on digital.”

CAMPAIGN EFFECTIVENESS

Post-campaign studies demonstrated its positive impact both on image and attitudes towards milk in each market. When respondents who recalled the campaign were asked to select the statements which they feel best apply to milk, the two most common across all countries were: "milk can be consumed at all ages" (65% after one year, 64% after two years, up from 62% prior); and "it is important to consume milk daily" (49% after one year, 44% after two years, up from 36% prior).

Moreover, around a third of respondents strongly agreed that the advert had a very positive impact on their perception of milk, with slightly more agreeing strongly that it encouraged milk consumption. Finally, it's interesting to note that the phrase "milk is for teenagers" scored extremely low both before and after the campaign, reflecting the challenge in improving the image of milk for this demographic.

BELGIUM/THE NETHERLANDS
www.melkeenkrachtvandenatuur.be

DENMARK

www.milkaforceofnature.dk

FRANCE

www.laitforcedelanature.fr

NORTHERN IRELAND/REPUBLIC OF IRELAND

www.milkaforceofnature.ie



LESSONS LEARNED

1. COLLECTIVE ACTION IS VALUABLE

Generally speaking, there are fewer category campaigns today because competition has driven brands to invest exclusively in their own activities. But the EMF campaign demonstrates the multiple benefits of collective efforts. It has helped build consensus among nutritionists and other opinion formers, so that a common message can be delivered to health authorities and consumers. And it has helped create a united political voice, which is important in lobbying at EU government level, where legislation and regulation is increasingly decided.

2. BUT BUILDING CONSENSUS CAN BE CHALLENGING

Despite a general agreement on the good of milk for human health, views and approaches of nutritionists, health authorities and other bodies can vary significantly from one country to another. Creating a definitive brochure acceptable to stakeholders in each of the EMF countries took two years. But knowledge sharing generally is clearly beneficial: "We all appreciate working together in a European dimension because we learn so much from each other," says Dominique Poisson, who plays an active role in EMF and is head of media services at CNIEL.

3. ECONOMIES OF SCALE BOOST IMPACT

Having one advert is much more cost-effective than many, so countries that might never have been able to afford to advertise on TV can as a result of the EMF initiative. Savings extend both to cost of production and buying space. Joint seminars can be more cost-effective too: events can be bigger, attracting more speakers and attendees and facilitating larger networks.

4. MARKETING NEEDS TO BE LOCALISED

Milk might look like the same product everywhere, but it's not. "Cultural differences were much more important than expected," says Laurent Damiens. The original advertising was the same for all eight countries – but the need for adaptation quickly became apparent. This was achieved by cutting in imagery related to local sports figures (see URLs above), which improved results.



#2 USA: CHANGING TIMES

These are changing times for milk marketing in the USA. After two decades, the “Got milk?” campaign – one of the most famous in modern advertising, with more than 90% awareness – was replaced with a new national campaign last year in an effort to make a more relevant connection between consumers and milk. Developed for the California Milk Processor Board in 1993, the slogan was licensed to the National Milk Processor Education Program (MilkPEP) in 1995 to run on their print ads, which over the years have featured hundreds of celebrities from David Beckham to Superman (left) wearing a “milk moustache”.

“Too many other foods are taking the spotlight when it comes to protein and it’s time dairy, which has some serious protein power, captures some of this growth. Dairy is high-quality protein and offers a number of consumer-relevant benefits that potentially provide a competitive advantage over alternative sources of protein.”

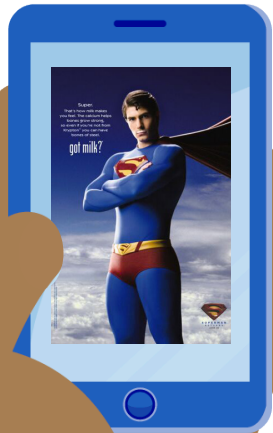
GREGORY MILLER, PHD, CHIEF SCIENCE OFFICER AT THE NATIONAL DAIRY COUNCIL AND EXECUTIVE VICE PRESIDENT AT DMI

Called “Milk life”, the new national campaign emphasises milk’s nutritional benefits, particularly its protein content, highlighting that each 8-ounce (237ml) glass of milk contains 8 grams of protein (below). It moves away from the celebrity approach of “Got milk?”, focusing instead on consumers to demonstrate how milk can give a boost to everyday activities. It particularly highlights breakfast, with the slogan: “Start your day with the power of protein.”

“While MilkPEP’s previous campaigns have been about changing milk’s image and making it more contemporary to encourage more consumption, the Milk life campaign shows what milk actually does for you,” said Victor Zaborsky, MilkPEP Vice-President of Marketing at the launch of the campaign.²¹

Protein is “really in the news and on consumers’ minds,” added Julia Kadison, CEO of MilkPEP. “But a lot of people don’t know that milk has protein, so it was very important to make that connection. Our powerful message is this – milk at breakfast powers your potential. And the reason to believe that is that milk is a natural source of high-quality protein.”²²

In parallel with Milk Life, MilkPEP launched the Great American Milk Drive, a programme supported by TV, print and digital advertising and social media that aims to make it “easier for Americans to buy milk for local food banks,”²³ said Kadison. “It’s going to give them another reason to purchase another gallon of milk, not for their own consumption but to help other families who cannot afford it themselves. We think that these programmes can help bring milk back to the position of being an unquestioned good.”²⁴



MilkPEP's approach has since evolved further, spurred by anti-milk messages, particularly a negative study published in the *British Medical Journal* last year.²⁵ The result was the Get Real campaign, which recruited scientists and nutritionists to use social media to spread the positives about milk's nutritional story and drown out detractors. Focused on a one-day saturation campaign, it was launched on 27 January – by 29 January, more than 6500 social media posts had reached about 21m people. The messages directed people to a dedicated website (www.milktruth.com) for more information.

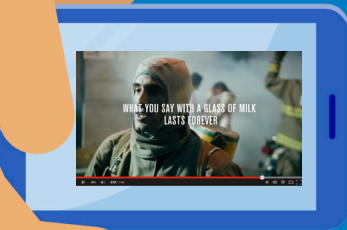
"Social media is not a broadcast channel – it requires interaction," says KC Brown, General Manager, Global Insights, Cision. "The Get Real one-day saturation campaign shows us that there is a community of supporters for milk's nutritional story ready to join the conversation. Building that community and supporting them with positive, shareable content will develop engagement."

"Get Real is just the beginning of a more aggressive approach and one part of our long-term strategy to safeguard milk's reputation against anti-milk messages. With a strong level of commitment from dairy farmers to milk companies, we can have a true impact on consumer confidence in milk's fundamental goodness."²⁶

JULIA KADISON, CEO, MILKPEP

5 GET REAL CAMPAIGN #MILKTRUTH FACTS

1. Milk is a nutrient powerhouse.
2. Milk provides valuable nutrients without excess fat or calories.
3. Milk offers a range of health benefits backed by decades of research.
4. Milk is not easily replaced.
5. Milk is a real, wholesome and local product from family farms across the nation.



GOT EMOTION?

The "Got milk?" campaign continues in California, where it began. The recent "Brave" ad is a potent example of emotional appeal, showing a firefighter remembering a conversation he had with his mother when he was a child, as he's pouring a glass of milk. "This campaign embraces every parent's desire, which is preparing our children for a successful and healthy future," says Jeff Goodby, Chairman of Goodby, Silverstein & Partners,²⁷ which created the advert. www.youtube.com/user/gotmilk

THE DIGITAL CHALLENGE

Anti-milk messages aren't new – they began in the 1940s and 1950s and developed in the 1960s and 1970s. But two other factors are: first, the emergence of what might be called an anxiety culture, in which phobias abound, providing fertile ground for negative messages; second, the rapid development of the internet and social media, which allows such messages to spread. These two together are a challenging combination.

"The internet helps to propagate anti-milk messages, because someone who thinks something might be bad for them will go online and find others that promote or believe that message too," says Laurent Damiens of EMF and CNIEL. "And there will be many more negative than positive messages because people who like milk and find it good for them don't post about it."

Negative posters, by contrast, can be highly active. "When we put something online, we might immediately have several negative comments," says Dominique Poisson of EMF and CNIEL. "So, do we answer them or not? Our strategy is not to answer. It can take so much time to talk with even one user – it never stops. Instead of answering point by point, we continue to post positive messages and also videos on YouTube in order to convince the Generation C consumers."

The danger is that such digital propagation can make fringe views seem more mainstream than they really are. "As an industry, we've faced attacks from activist groups for years, but this new social dynamic has elevated the attacks," says Julia Kadison. "Unfortunately, all it takes to be a self-proclaimed nutritional 'expert' these days, it seems, is a smartphone and an opinion. But much of the advice and opinion that these untrained influencers share online is not supported with research, and solely advances an uninformed opinion or political agenda."²⁸

Both EMF and MilkPEP have a similar approach to dealing with anti-milk views, which is to focus on putting out positive and scientifically robust milk messages, rather than getting into debates that run the risk of adding the "oxygen of publicity". Moreover, debates with individuals tend to be ineffective, argues Laurent Damiens, because anti-milk views are often held on an emotional rather than a rational level. "You can give all the scientific arguments and they'll never believe you. That's one reason why we have two parallel campaigns at EMF: one focused on opinion formers on a rational level; and one targeting consumers directly on a more emotional level."

"Engaging in social media conversations is an integral part of communications. Much like in traditional media, a globally consistent and simple message that can be easily parlayed into local activations helps to drive cohesion. Leveraging a social media community to communicate that message builds understanding and engagement."

KC BROWN, GENERAL MANAGER,
GLOBAL INSIGHTS, CISION

THE VIEW FROM DMI²⁹

Reaching consumers today is a continuous learning exercise: shaping and changing consumer perception and behavior over time requires communicating differently. Consumers are deluged with information daily from non-traditional sources and new trusted "experts". It used to be we could "just tell them" and we were good. Today it requires showing them, involving them in the story, connecting emotionally and reaching them in the many, many places they live on and offline. It requires transparency, and being open, honest, candid and sometimes edgier than our conservative industry has ever been.

Today, consumers have an additional set of factors that influence what they purchase. Are the products produced responsibly, in a manner that reduces environmental impact? Are the cows treated well? Are they given medicine unnecessarily, and does that pass into my milk? These new expectations about food grow while generations drift further from the farm. They demand more but know less. Worse, they believe the unreality of what anti-animal agriculture activists tell them about animal care, antibiotics, hormones, pollution, milk quality and more. The extremists are leading the conversation and steering people away under false pretences. Closing that gap and spreading the truth is crucial to dairy's future.



#3 SOUTH AFRICA: CONSUMER EDUCATION PROGRAMME

Since 2008 Milk South Africa has been running an ambitious Consumer Education Project (CEP), essentially a multi-channel health and nutrition-based campaign to convey the general good of milk and other dairy products. The campaign uses the South African Department of Health's food-based dietary guidelines as an integral part of its communication products.

South Africa's first dietary guidelines were drawn up in 2003 and did not include specific amounts for milk and other dairy products, which were instead covered under the "animal protein" umbrella. However, consistent reports of low calcium and low potassium intakes in the population, along with high levels of hypertension and related conditions, led the Department of Health to rethink and in 2012 new national guidelines were published and the population was urged to "have milk, maas [a fermented milk drink] or yoghurt every day".

Milk South Africa's CEP was set up in response to consumers' lack of knowledge and misconceptions about the benefits of including milk and dairy products in the diet, as established by a comprehensive survey in 2007. As Christine Leighton, project coordinator, explained: "The CEP needed to counter both a lack of information and some misunderstandings about the nutritional value of milk and other dairy products.

"To bring about an informed change in people's consumption behaviour we have targeted two main groups. Specialised communication is directed at health professionals (mainly dietitians, nutritionists, doctors and nurses). General communication is focused on consumers, mainly those in LSM [living standard measure] group 6-8, the fastest-growing group in modern South Africa. For both groups the project concentrates on conveying the scientifically proven health and nutritional benefits of milk and dairy in the diet."

THE MESSAGES TO CONSUMERS COVER SIX KEY ISSUES

GROWTH

Dairy promotes growth through protein and calcium content

MUSCLE DEVELOPMENT

Dairy builds muscle through protein and amino acids

SKELETAL HEALTH

Dairy strengthens bones because of its calcium content

WEIGHT LOSS

Dairy forms part of a low-fat diet

NUTRITIONAL CONTENT

Dairy is a nutrient-rich food, as it contains proteins, vitamins and minerals

FAT CONTENT

Dairy has less fat than generally perceived



"The adverts – and in fact the whole consumer campaign – are about taking milk and other dairy products out of the kitchen and bringing them into people's lives, making them part of a warm, colourful world. The messages of the CEP are based on scientific information but are conveyed to consumer in ways that speak to their minds and hearts, as emotions play a huge role in the behaviour of consumers."

ALWYN KRAAMWINKEL, CEO OF SAMPRO (SOUTH AFRICAN MILK PROCESSORS' ORGANISATION) AND CHAIR OF THE MANAGEMENT COMMITTEE, CEP

DUAL APPROACH

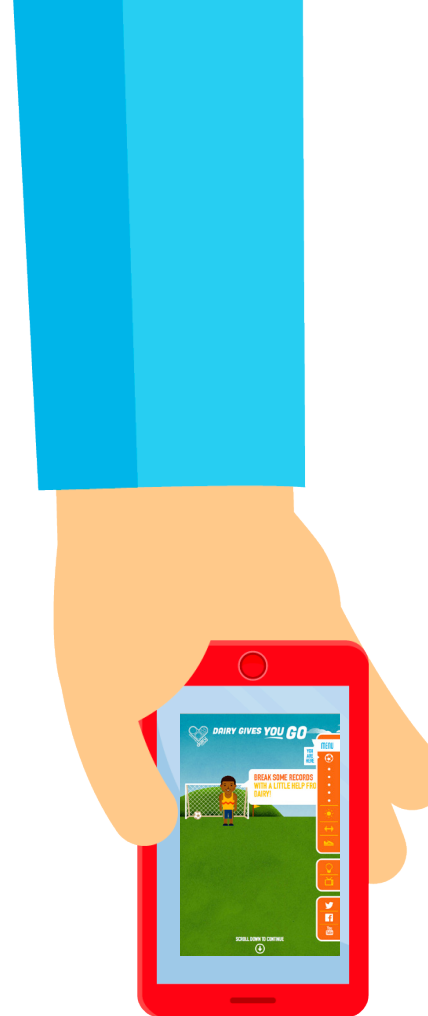
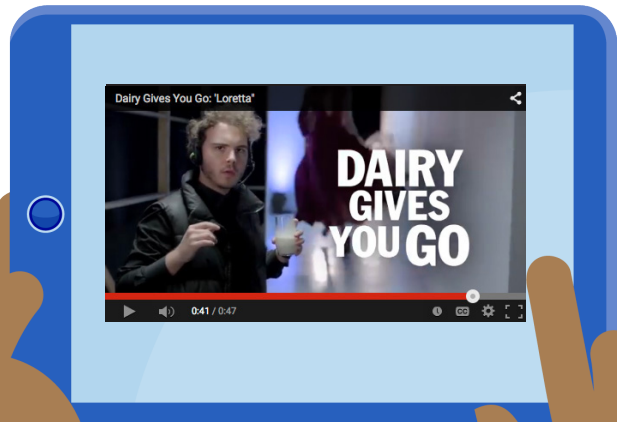
The communications for health professionals cover the role of dairy in a healthy lifestyle and in the prevention of "lifestyle diseases" such as hypertension and diabetes. All messages are reviewed and substantiated by subject experts. By targeting health professionals, the CEP ensures that messages can be credibly conveyed to the wider population well beyond the life of the campaign.

The CEP also targets lower-income groups through its work at government clinics and training hospitals, as well as promoting the benefits of milk in schools through curriculum-focused learning materials and to sportspeople through targeted materials. Teenagers (again in LSM 6-8) have been a specific focus of recent activity, not least because they are the next generation of young parents.

The communication channels are chosen according to their target market and are supported by media liaison. Channels and resources include, for example, a nutrition education USB-stick tool for student dieticians, the Rediscover Dairy website for general consumers, microsites for teenagers and sportspeople, wellness programmes in clinics, school posters and teachers' guides and a hugely successful suite of TV/digital adverts initially developed for teenagers.

The credibility of the material produced for professionals has been widely acknowledged. At university level, all final-year dietetic students are equipped with the "Dairy-based nutrition" educational booklet developed by the CEP, for use in their future careers. The CEP also contributes to the "Continuing nutrition education" activities of dieticians, whereby

The campaign includes a series of highly engaging teen-friendly TV adverts.



Digital material and microsites offer interactive content suitable for all ages.

they can obtain Professional Development Points that are accredited by the Health Professional Council of South Africa.

The consumer-focused material has been extremely well received, winning various local and international awards, and includes a particularly engaging range of TV adverts designed for teenagers with the theme "Dairy gives you go". These are enhanced by digital material and related microsites and have been popular with all age groups for their character-driven narratives showing teenaged prodigies in the worlds of sport, music and fashion whose drive and energy come from milk.

All the messages are communicated under the umbrellas of "Rediscover dairy", "3-A-DAY" and/or "Dairy gives you go". All three expressions are registered.

You can link to the 45-second (TV) advert or extended digital version of "Dairy gives you go" at: www.youtube.com/user/DairyGivesYouGo. You can find out more about the campaign and link to both consumer and professional materials at the "Rediscover Dairy" website: www.rediscoverdairy.co.za

#4 INDIA: UNLOCKING THE MARKET WITH MOTHER "SAFE FOOD AMBASSADORS"

India is an unusual case. The second-largest emerging economy produces 16% of the world's milk, and yet demand still appears set to outstrip production. There is a huge unregulated market of rural producers here and most milk is bought loose and unprocessed from independent sellers and through middlemen.

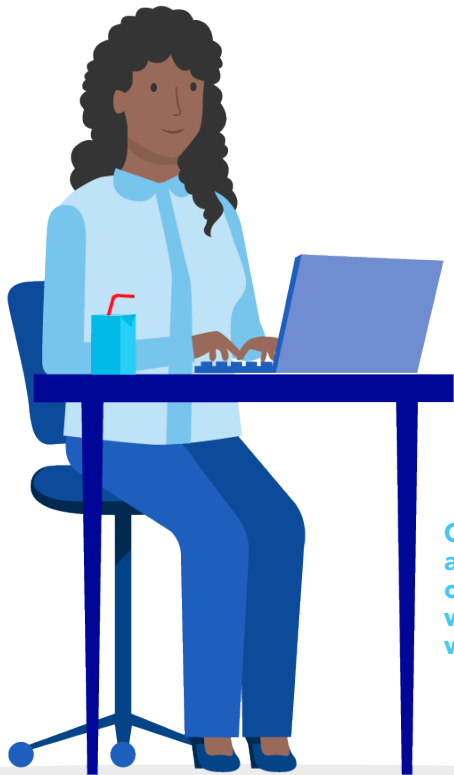
The Indian market has great potential but is complex to unlock. Food safety may well be the key. Tetra Pak's "Right to Keep Food Safe" campaign, the first phase of which ran from October 2014 to March 2015, is a large-scale public awareness initiative leveraging the power of social media and recruiting mother "safe food ambassadors" to promote the safety and nutritional benefits of packaged UHT milk and juice within their communities online, in print and at live events held across 10 cities.

Before the campaign was launched, Tetra Pak commissioned a "Conversations with Mothers" food safety survey. Among its findings was that one in three mothers surveyed was unsure about the safety and quality of the food she gave her family.

Working with media partner *The Times of India* and with a strong online presence, the campaign was based around a search for influential mothers, which was eventually narrowed down to 15 mother "safe food ambassadors". Over 2000 mothers in total attended seminars and workshops on nutrition and food safety and were encouraged to blog about what they had learned, taking the message to ever larger groups of influencers in a ripple effect. The core messages were reinforced throughout the campaign in print media, and particularly in lifestyle publications, always with an endorsement from a renowned nutritionist.

In addition to the central campaign, Tetra Pak was involved in setting up Nutrition Quotient (NQ) in association with the Indian Dietetic Association and the All Indian Institute of Medical Sciences – Department of Community Medicine in 2013. NQ is the first online course of its kind on food safety, nutrition and packaging. Initially the course was only for health professionals, nutritionists and dieticians but in 2014 a new online course was launched for mothers to become more aware about food safety and make safer and healthier choices for their families. More than 3,000 health professionals and 4,000 mothers have so far completed the NQ course.

At the end of May 2015, to mark the end of the first phase of this seven-month campaign, a two-part series on "the right to keep food safe" will be broadcast on India's leading English-language news channel – Times Now – covering food safety issues and solutions and featuring the 15 "safe food ambassadors".



Over 2,000 mothers in total attended seminars and workshops on nutrition and food safety and were encouraged to blog about what they had learned.



NQ is the first online course of its kind on food safety, nutrition and packaging.

#5 LATIN AMERICA: FEPALÉ'S "¡SÍ A LA LECHE!" CAMPAIGN

Launching at the end of May 2015 to coincide with World Milk Day on 1 June is the "¡Sí a la Leche!" ("Yes to Milk!") campaign from FEPALÉ, the Pan-American Dairy Federation. The campaign has run annually since 2008 but this year sees a new phase as it increases its reach with a refreshed visual identity and a strong and consistent social media presence via a website (www.sialaleche.org), Facebook and LinkedIn.

The "¡Sí a la Leche!" campaign promotes the nutritional value of milk to consumers and works with health and nutrition professionals, doctors and respected academics from all over Latin America to source and verify information about milk's health and disease prevention benefits.

Every year, FEPALÉ coordinates a variety of events, not just for the professional community but also for the direct participation of children and young people, parents and teachers. The campaign also includes a focus on promoting school milk programmes throughout the region.

The "¡Sí a la Leche!" campaign is supported by more than 100 organisations from both the private and public sectors, which include academic and government institutions as well as around 50 dairy companies from across Latin America.

This campaign is part of the "More Milk = More Health" programme, coordinated by Rafael Cornes, who is also professor at the Nutrition University of Uruguay and nutritionist to the Club Nacional de Fútbol (the Uruguayan national soccer team). It is based on scientific evidence from world-renowned researchers showing the indisputable benefits of dairy consumption for human health, sharing with the community the results of their investigations.



A GLOBAL CELEBRATION

Here's just a sample of what else is happening on World Milk Day.



LECHE

The logo consists of a circular orange shape with a scalloped edge, containing a small white teardrop icon above the word 'LECHE' in white, bold, uppercase letters. The logo is mounted on a thin orange vertical post.

THAILAND

World Milk Day event in Bangkok, at which Tetra Pak is setting up an educational booth to support customers.

INDONESIA

World Milk Day activities by Tetra Pak to highlight the nutritional value of UHT include advertorials in parenting publications, a plant visit and a discussion with Ultrajaya, including an online event with a bloggers' forum for mothers.

THE PHILIPPINES

Annual World Milk Day event with Alaska Milk Corporation. Last year's sponsored family run with over 3,000 participants raised a record number of milk packs for its chosen charity and participants celebrated with national synchronised milk drinking!

MALAYSIA

The Dutch Lady brand continues its run of World Milk Day events in Malaysia. These events have got the brand into the record books in the past for milk giveaways (250,000 free packs in 2010) and simultaneous milk drinking. They also broke a world record for cheering at an event held to support Malaysian athletes at the 2012 Olympics.



27_references & acknowledgements

REFERENCES

- ¹ Unless otherwise stated the statistics in this section come from ALES Market Research for Tetra Pak, "Milk Image: Germany, Spain, Thailand, USA, China, Brazil", April 2015.
- ² Respondents in China mentioned a concern about unsanitary milk. This may be linked to contamination scandals that have affected local milk from 2008. Since then, consumption of premium and imported milk has been increasing in China.
- ³ U&A: Usage & Attitude Studies 2006-2011. U&As aim at understanding how consumers shop, consume and relate to a specific category, which means what/who/where/when/why they buy and consume.
- ⁴ ALES Market Research for Tetra Pak, "Milk Image: Germany, Spain, Thailand, USA, China, Brazil", April 2015.
- ⁵ U&A: Usage & Attitude Studies 2006-2011.
- ⁶ U&A: Usage & Attitude Studies 2006-2011.
- ⁷ Unless otherwise stated the research in this section come European Milk Forum (EMF), "Milk, nutritious by nature: The science behind the health and nutritional benefits of milk and dairy foods", July 2014.
- ⁸ Food and Agriculture Organisation of the United Nations (FAO), "Milk and dairy products in human nutrition – questions and answers".
- ⁹ For the dietary guidelines of various countries see www.fao.org/nutrition/nutrition-education/food-dietary-guidelines/en/
- ¹⁰ FAO, "Milk and dairy products in human nutrition", 2013.
- ¹¹ Khalifa Elmusharaf, Sani Njobdi et al, "Health Assessment of the Impact of School Milk Programme on School Children in Three Primary Schools in Khartoum State". Khartoum, Sudan. Reproductive and Child Health Research Unit, University of Medical Sciences and Technology, 2012.


- ¹² Stunting refers to restricted physical development. According to the World Health Organisation: "High levels of stunting are associated with poor socioeconomic conditions and increased risk of frequent and early exposure to adverse conditions such as illness and/or inappropriate feeding practices."
- ¹³ Statistics collected by local authorities, and results compiled by Tetra Laval Food for Development Office, Stockholm, 2014.
- ¹⁴ Datamonitor Consumer Survey, 2013.
- ¹⁵ EMF, "Milk, nutritious by nature: The science behind the health and nutritional benefits of milk and dairy foods", July 2014.
- ¹⁶ See Dairy Index 2014: "Dairy supply and demand: A global balancing act".
- ¹⁷ Nielsen, "We are what we eat: Healthy eating trends around the world", January 2015.
- ¹⁸ Datamonitor Consumer Survey, 2014.
- ¹⁹ The NPD Morning MealScape 2011 study surveyed 27,179 Americans between 10 January and 7 March, 2011. The results indicated that males aged 18-34 are most likely to skip breakfast (28%) and females aged 55 and older are the most likely to eat a morning meal: only 10% reported skipping breakfast. Among children, skipping breakfast correlates with age – teenagers are more likely not to eat breakfast than younger children.
- ²⁰ Nielsen, "We are what we eat: Healthy eating trends around the world", January 2015.
- ²¹ Quoted by DairyReporter.com.
- ²² Speaking at the International Dairy Foods Association Dairy Forum, Palm Springs, California, January 2014.
- ²³ A food bank is a non-profit, charitable organisation that distributes food to those who have difficulty purchasing enough food to avoid hunger.

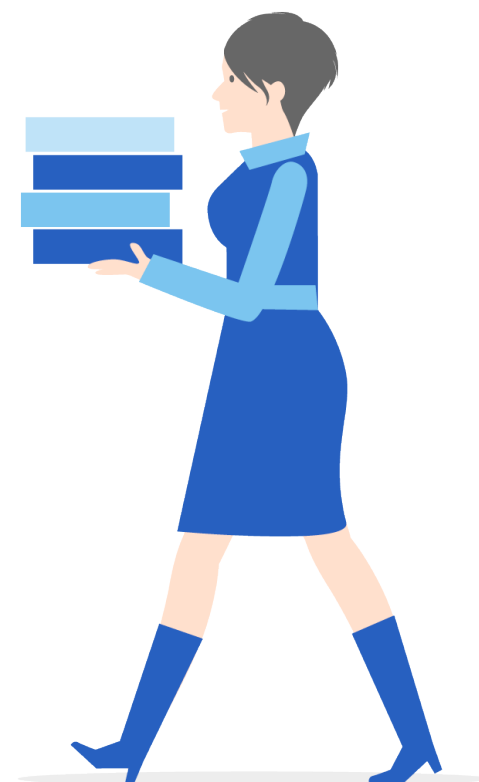
- ²⁴ Speaking at the International Dairy Foods Association Dairy Forum, Palm Springs, California, January 2014.
- ²⁵ Milk intake and risk of mortality and fractures in women and men: cohort studies, *British Medical Journal*, October 2014.
- ²⁶ Speaking at the International Dairy Foods Association Dairy Forum in Boca Raton, Florida, January 2015.
- ²⁷ Quoted in *AdWeek*.
- ²⁸ Speaking at the International Dairy Foods Association Dairy Forum in Boca Raton, Florida, January 2015.
- ²⁹ Dairy Management Inc.™ (DMI) is funded by the USA's nearly 47,000 dairy farmers, as well as dairy importers. DMI manages the National Dairy Council and the American Dairy Association, and founded the US Dairy Export Council and the Innovation Center for US Dairy.

ACKNOWLEDGEMENTS

With thanks to the following for their help in compiling the information in this report: CNIEL (Centre National Interprofessionnel de l'Economie Laitière); Consumer Education Project of Milk, South Africa; DMI (Dairy Management Inc); EMF (European Milk Forum); FEPALE (Pan-American Dairy Federation); Global Dairy Platform; LRF (Federation of Swedish Farmers); MilkPEP; National Dairy Council USA; Al Ain Dairy, Ghanbia, Jimmy's Iced Coffee, Juhayna, Lala, Maeil Dairies, Nestlé, Piracanjuba, Sneakz, Yili; Professor Guansheng Ma, School of Public Health, Peking University; Cision.

© 2015, Tetra Pak International SA, Lausanne, Switzerland.

Tetra Pak, Tetra Prisma, Tetra Top and  are trademarks belonging to the Tetra Pak Group.



INNOVATE AND BE RELEVANT

Two main factors influence consumer choice today: the desire for optimum health and wellness; and an increasingly busy, complex lifestyle.

The enduring belief in milk's goodness shows it is perfectly positioned to exploit the first of these major trends, despite negative messaging.

But traditional products are not enough today. Modern consumers want beverages that deliver maximum health benefits and fit into their pace of life.

There are huge opportunities for innovative producers that can bridge this gap.

COMMUNICATE AND RESONATE

Innovative new products are only part of the story. Marketing and communications also need to evolve to capture the attention and excite the modern consumer.

It's important to strike a balance between facts and emotions: to maintain the flow of positive messages and keep the scientific findings alive, while also reaching out to the hearts of consumers.

Relationships with influencers are key. So too is choice of media and tone, especially when speaking to the younger generation.

Alignment and collective communication are more relevant today than ever.

