



MEMBERS' CONFERENCE AGENDA

Thursday 15th & Friday 16th September 2022

Jiva Hill Resort, Crozet, France

Thursday morning 15th September

10h30 Introduction to the 2022 GDC Conference

- Introducing this year's Conference attendees
- The main events since the last GDC
- The Big Issues for this year: an introduction to the main themes of the Conference

11h00 **How long will the current situation in China last for? What consequences for the dairy world next year, and for the next 5 years?**

- Can the growth of milk collection continue? At which level? How is that possible? For which share of total consumption?
- Will the Chinese dairy farming model be sustainable? What are the strengths and risks?
- What is happening on the consumption side? Due only to the impact of Covid-19 zero policy? New trends appearing in the market? What future for imports? Short term (Stocks?)? Long Term?
- What is happening on the Chinese pig market? Impact on the whey market?
- Round table

Thursday afternoon 15th September

14h15 **Situation in Ukraine**

14h30 **Supply & demand balance: Where will the milk come from in the future? Are we going to have enough?**

Supply situation

- Feed prices
- The EU situation: analysis of the situation in the main key producing countries. Why is milk collection decreasing (main reasons and scenarios for the future)? What about the milk price paid to farmers in 2023? What future for milk collection? What role and share for the EU as an exporter in the next 5 years? Which key products?
- Can the US replace the EU on world markets? For which products? For which destinations?
- Role of NZ? Impact of the two new FTAs (UK, EU)? Role in Asia?
- Is there any other country which can take a major role for exports in the next 5 years? What about India? What could happen there?



16h45 Demand situation

- Where will demand growth outside China come from for the next 5 years? Key data: by commodities/by country. Special focus on dairy fats
- Potential impact of inflation on consumption? EU/US?
- Impact of inflation in the EU foodservice sector
- What about demand in Africa? Role of FFMP for the future of Africa?

18h00 Conclusion: what about the gap between supply and demand?

18h30 Price forecasts

Friday morning 16th September

08h30 The sustainability trend

- Brakes and Levers of Sustainability in the Dairy Sector
- How is sustainability in the dairy sector evolving? What are companies doing?
- New CAP advancement
- How can Bovaer® fit into the dairy industry value chain?
- What about plastic in packaging? Key trends for packaging
- Round table

Friday afternoon 16th September

13h00 What about alt-protein trends: Watch out for the new technology!

- Key trends & data in this market? Which is the winning ingredient?
- The market from an investor's point of view
- Cell-based and fermentation: the next technology?
- Discussion and Q&A

15h00 The ingredients sector

- How to improve the profitability of technical dairy ingredients' business?
 - Permeate valorisation
 - Is drying always a necessity? The potential of liquid and concentrated ingredients
 - Functional systems
- Dairy proteins record prices: will there be long-term impacts on the demand?
 - Changes in applications?
 - Substitutions (between dairy ingredients and/or by plant-based proteins)?
- Conclusion: opportunities and threats for dairy companies

16h25 Wrap up session/conclusions