

The Strong Inside™

Presented by American Dairy Products Institute
to the Dairy Promotion Order Advisory Board

Veronique Lagrange, ADPI vlagrange@adpi.org



Agenda

- Introduction
- Context
- Proposal Description, Goals, KPIs, Project Costs
- Benefits to the New York State Dairy Industry
- New York State Supporters – Letters of Support

Introduction



Proposal presented by the **American Dairy Products Institute**, a non-profit trade association, on behalf of the Dairy Protein Messaging Initiative (“The Strong Inside” campaign), and its New York-based supporters





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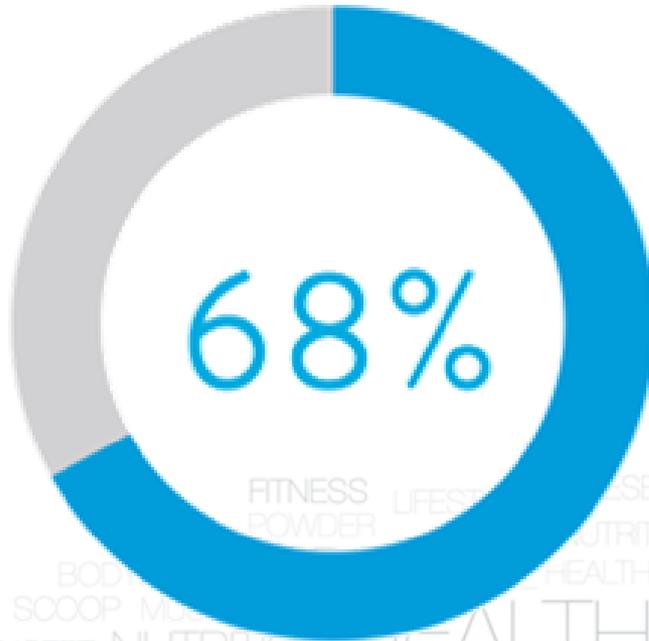


Dairy proteins reigned...

Estimated share of the protein ingredient market: >90%



Source: ADPI, 2019. Based on new product introductions. United States.



And 68% of Americans said they wanted to consume more proteins

FITNESS LIFESTYLE SE
POWDER NUTRITIONAL
BODY SCOOP MUS HEALTH ORGANIC
CONCEPT NUTRITION HEALTHY MEAT CONTAINER
Egg
WORKOUT
CHICKEN COOKING WEIGHT DIET DRINK FOOD INGREDIENT REPLACEMENT
SUPPLEMENT SHAKE
DAIRY BODY ENERGY EXPOSE MILK
TRAINING GYM

Protein content influences 3 in 5 global consumers, 30% of Americans



“Protein content is influencing my purchasing decision”



Protein content drives purchase decisions and R&D

Source Innova Consumer Survey 2019: Average of 10 countries, Innova Database. ADPI July 2020
Notes *Year-to-date = Jan 2020 - July 2020

This attracted a flood of investments



Investing in plant protein accelerates



Why Investors Believe Plant-Based Protein Is the Key to Building the Tesla of the Food Industry

4 years ago

HI CONFERENCE 2018

Investors back a boom in plant proteins



How To Invest In The Growing Demand For Protein

May 22, 2016 5:28 AM ET | 16 comments | Includes: ADM, BG, BUR, CALM, DANROY, DF, GLAPP, MHG, SA

Western Canada's protein supercluster tapped for a cut of \$950 million



Pulse of the Prairies: Why investors are pouring millions into peas as 'the future of food'

New protein ingredients multiplied, as well as alternative beverages



And today...



51%
of Americans are
interested in plant-
based products

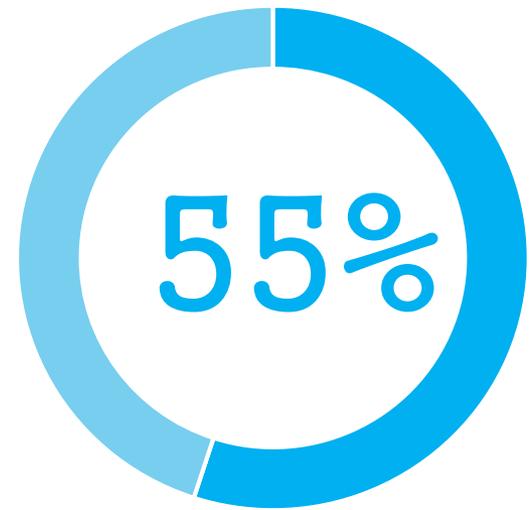


Sales of plant-based “milks” up 6%



\$4.5 BILLION
PLANT-BASED FOOD & BEVERAGE SALES

And our market share of the protein market is falling



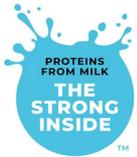
Estimated share of the protein ingredient market in 2019



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In 2018, the dairy industry united to create Dairy Protein Messaging Initiative, funded **The Strong Inside™** Campaign: now supported by **55** companies, associations, trade press.



Co-Sponsors	Sustaining Members	Supporters
	 	   
	   	     
	    	     
	   	   
	     	    

A digital communication campaign



Campaign Initiative: The Strong Inside™ campaign is dedicated to educating consumers about the importance of proteins from milk.

Marketing Objective: Raise awareness of the benefits of proteins from milk, as found in milk, cheese, yogurt, and a variety of milk ingredients.

Goals:

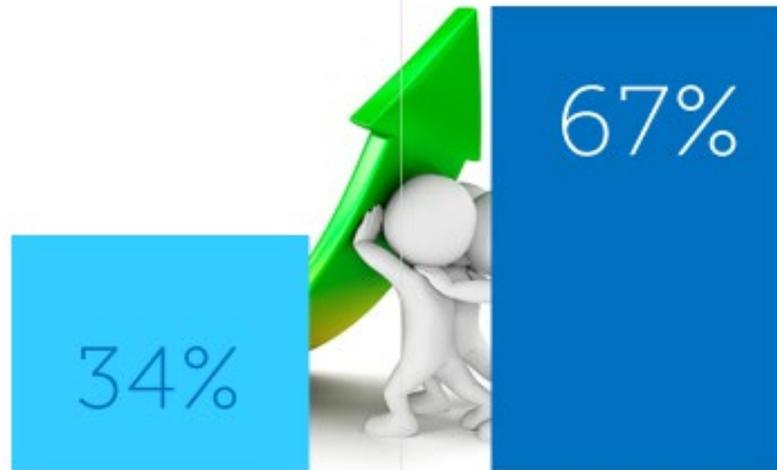
- Drive consumers to consider proteins from milk
- Increase connection between health and proteins from milk with key audiences

The digital campaign utilizes **tested messages** which can effectively influence consumers



Intent in consuming more proteins from milk, pre- and post-messaging

* ADPI/DPMI Padilla Consumer Research 2019.



Digital communication campaign:
core website, videos, infographics, paid media ads and
searches, earned media, paid and organic social media,
influencers



[Protein Tips](#) | [Proteins From Milk](#) | [Recipes](#) | [FAQs](#) | [About](#) | [Contact](#)



PROTEINS FROM MILK

Create the Strong Inside

What's Your Strong Inside?

Proteins From Milk Are Strong Inside

Proposal is designed to strengthen core campaign elements and adds incremental elements



Website, video, infographics, recipes:

Core of the campaign, the website is continuously upgraded to match consumers FAQs. Consumers are driven to the site through a variety of digital levers (see below). The site features benefits of dairy proteins, downloadable guides, practical information (protein calculator, recipes), and addresses myths and misconceptions in a positive tone.

KPIs 2020: Goal of 465,000 sessions.



Website upgrades
Photography
Recipes
Re-targeting



Paid Media: Expose consumers to the message, benefits of dairy proteins. Target broad range of consumers within audience.

KPIs 2020: Goal of 15 million impressions, exceed industry benchmarks for conversions (consumer follow-through to website)



Increase placement of ads



Paid Search:

Effectively guide consumers who seek protein information to the campaign website and personalized information to meet their needs.

KPI's: 2020 Goal of 1.2 million impressions, maintain conversion rates well above industry average

Increase placement of ads



Influencers:

Working with key influencers who post videos of recipes with proteins from milk, (Instagram and Facebook audiences), and redirect to campaign website.

KPIs 2020: Goal of 2.25 million impressions.

Recipes, postings health tips



Paid Social Media:

Actively push benefits* to target audience, using the power of social media; achieve status of credible source for information on proteins from milk. Current rating: 5 Stars.

KPIs 2020: Goal of 25.8 million impressions.

*Designed to reflect the Strong Inside message map. Messages are tested for effectiveness.

News ads, increased postings



Organic Social Media:

Use-free tools provided by each social network to build a social community and interact with it, sharing posts and responding to customer comments. Create engagement and support.

KPIs 2020: Goal of 17,500 impressions, 2,800 followers

New messaging, photography for social media



Earned Media:

Broadcasts and digital articles.

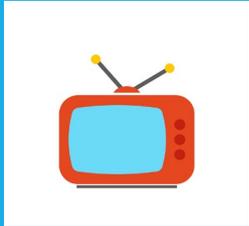
Place actionable information on how to use proteins from milk, where to find them and why proteins from milk are preferred in health and fitness segments of local news.

Get coverage in on-line health and fitness magazines (Shape, others)

KPIs 2020: 3 Segments.

New segments
On-line health magazines

Elements targeting New York State consumers



New York media

TV segments in New York state regions (e.g. Rochester, Albany, Syracuse)

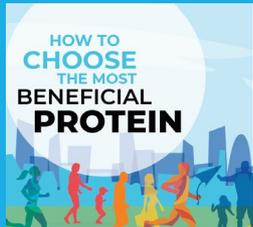
KPI: Audience reached



Health & Fitness Professionals

Database development for targeted media: health and fitness professionals communications, New York media RD, New York sports and fitness experts
New York weight management specialists

KPI: Contacts in database



Health Professionals Communications

Customized e-mails with content on benefits of proteins from milk

KPI: % conversions



NYC Digital Magazines:

Sponsored content articles

KPI: Circulation and reach

New York supporters can use the initiative to support their own digital communications



Lactalis Brand Pronativ® Joins Industrywide Communication Initiative to Educate Consumers on Protein Ingredients



NEWS PROVIDED BY Lactalis Ingredients → Sep 13, 2019, 15:22 ET

BUFFALO, N.Y., Sept. 13, 2019 /PRNewswire/ -- Lactalis Ingredients, a division with the American Dairy Products Institute (ADPI) and the industry-led Dairy educate consumers about the benefits of proteins from milk. "The Strong Inside the positive attributes of proteins from milk, with a focus on protein ingredients will serve as an informational tool to guide targeted consumers to their protein choices.

MILK SPECIALTIES GLOBAL
Milk Specialties Partners with ADPI in Launching 'The Strong Inside' Campaign



The Strong Inside: Educating consumers on the nutritional impact of dairy proteins



AMPLIFICATION: EXAMPLES Posts on Linked In, Social Media



AMPLIFICATION: EXAMPLES Post snips on Instagram, Facebook...



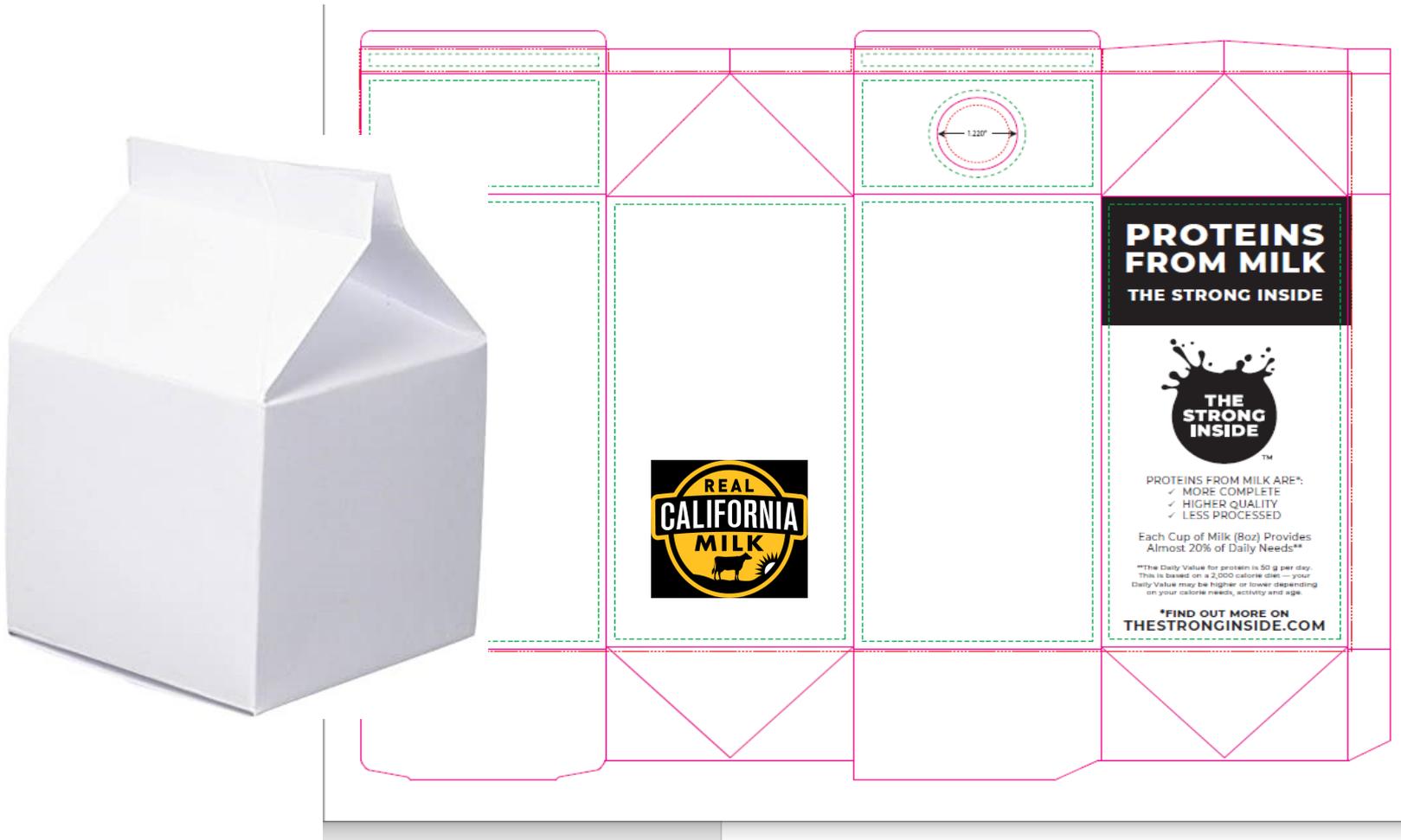
Agropur creative - Instagram



Beneficial Protein - The Strong Inside shows that many of us don't understand...

Also available to New York State processors, pending support: Use of campaign assets

(Use on milk cartons - example, test project, California)



How is success measured?

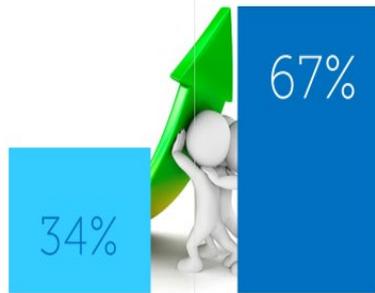
Metrics: Each digital element has its own metrics and KPIs: impressions, click-through rate, conversions, etc. and analytics are used to measure impact on a monthly basis.

Campaign impact on attitudes measured yearly:

In early testing 67% of consumers exposed to campaign messages intend **to increase their consumption of proteins from milk**

Intent in consuming more proteins from milk, pre- and post-messaging

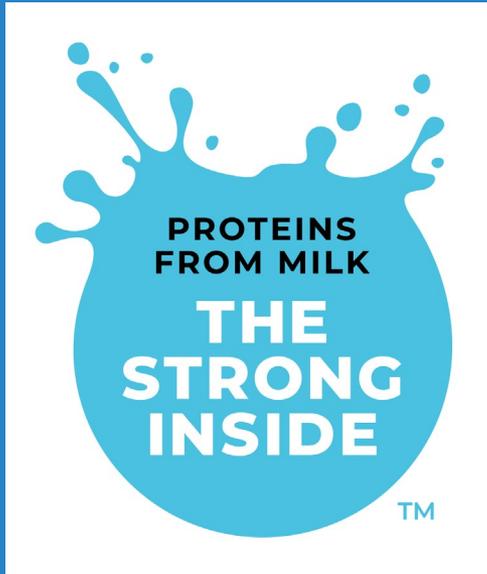
* ADPI/DPMI Padilla Consumer Research 2019.





Projects costs

- The **Strong Inside**TM proposal for funding features support and enhancements of the existing nationwide campaign (\$100,000), as well as elements specifically targeting New York State-based consumers (\$47,000).
- The **Strong Inside**TM is managed by the American Dairy Products Institute, a non-profit trade association, with both input and oversight from its funders/investors.
- Participation through Committees and Task Forces
- 100% of funding goes to campaign expenses; monthly reporting to supporters, quarterly meetings + ad-hoc presentations.





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Benefits to NY State Dairy Industry

- Increased awareness of dairy benefits among new generation of NYS consumers
- Dairy market share growth
- Increased sales, intent to consume more proteins from milk
- Use by NYS processors (retail) for promotions
- Use by NYS industry and partners for own digital and education campaign
- ✓ Ingredients: 1/3 of milk solids utilization (US), over \$375 million in NY State.



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Agri-Mark, Inc.

40 Shattuck Road, Andover, MA 01810



agrimark.coop

P. 978.552.5500

September 3, 2020

Dear Board of Directors of the NY Dairy Promotion Order:

The non-profit trade association American Dairy Products Institute ("ADPI"), Elmhurst, IL, has submitted a proposal for funding of generic promotion campaign project from the New York State Dairy Promotion Order.

Our company, Agri-Mark, Inc., is in full support of the ADPI funding proposal. We desire to grow sales of New York milk and dairy derived products, and to this end, we have financially supported ADPI's (The Strong Inside™) campaign. This campaign is now entering into its second year of delivering on its objective to increase consumer awareness on the superiority of dairy (milk and whey) proteins versus plant-based products. Our cooperative is actively engaged in the Task Force which manages and supervises this effort.

The ADPI proposal for funding consists of: (1) an incremental contribution to the nationwide, digital marketing campaign dedicated to educating consumers about the important of proteins from milk (\$100,000) and, (2) specific elements which will target consumers in the State of New York, directly as well as through health influencers and via traditional (TV) and digital media platforms (\$47,000). Through this effort, we as the collective dairy industry, desire to increase our market share of the global protein market.

The Strong Inside™ campaign is currently supported by a number of companies operating in the State of New York, including our company, Agri-Mark Inc., with our McCadam Cheese plant in Chateaugay, NY, in addition to Cayuga Milk Ingredients, Great Lakes Cheese, O-AT-KA Milk Products Coop, and Sorrento/Lactalis. This campaign is truly pre-competitive because the >50 representative funding companies are a mix of domestic and foreign suppliers, coops, trade associations and other dairy organizations.

It is our hope that the Board of the New York State Dairy Promotion Order reviews the ADPI funding proposal favorably, as we are confident its implementation will help support our 432 NY farmers and other New York based milk and whey protein manufacturers to increase sales of New York made milk and whey proteins both domestically and internationally.

We hope you agree, like we did, that the The Strong Inside™ campaign is a cause worthy of financial support to increase sales of NY milk.

Yours Truly,

President & CEO
Agri-Mark, Inc.



Owned by the farm families of Agri-Mark who provide their farm fresh milk to their award-winning brands.

agrimark.coop | cabotcheese.coop | mccadam.coop





September 3, 2020

Dear Board of Directors of the NY Dairy Promotion Order:

The non-profit trade association American Dairy Products Institute (ADPI), Elmhurst, IL, has submitted a proposal for funding of generic promotion campaign project from the New York State Dairy Promotion Order.

Our company, Cayuga Milk Ingredients, is in full support of the ADPI funding proposal. We desire to grow sales of New York milk, and to this end, we have financially supported ADPI's (The Strong Inside™) campaign. This campaign is now entering into its second year of delivering on its objective to increase consumer awareness on the superiority of milk proteins versus plant based products. Our company is actively engaged in the Task Force which manages and supervises this effort.

The ADPI proposal for funding consists of: (1) an incremental contribution to the nationwide, digital marketing campaign dedicated to educating consumers about the important of proteins from milk (\$100,000) and, (2) specific elements which will target consumers in the State of New York, directly as well as through health influencers and via traditional (TV) and digital media platforms (\$47,000). Through this effort, we as the collective dairy industry, desire to increase our market share of the global protein market.

The Strong Inside™ campaign is currently supported by a number of companies operating in the State of New York, including our company, Cayuga Milk Ingredients, in addition to Agri-Mark Inc, Great Lakes Cheese, O-AT-KA Milk Products Coop, and Someno/Lactalis. This campaign is truly pre-competitive because the >50 representative funding companies are a mix of domestic and foreign suppliers, coops, trade associations and other dairy organizations.

It is our hope that the Board of the New York State Dairy Promotion Order reviews the ADPI funding proposal favorably, as we are confident its implementation will help support our company and other New York based milk protein manufacturers to increase sales of New York made milk proteins both domestically and internationally. Our company since inception in 2014 has desired to sell more milk proteins, and in turn, we will source more high quality New York milk to do so.

We hope you agree, like we did, that the The Strong Inside™ campaign is a cause worthy of financial support to increase sales of NY milk.

15 Eagle Drive, Auburn, New York 13021 Phone: 315.254.6070 www.cmiingredients.com

Yours Truly,

Kevin J. Ellis
CEO

Cayuga Milk Ingredients



September 7, 2020



Dear Board of Directors of the NY Dairy Promotion Order:

The non-profit trade association American Dairy Products Institute ("ADPI"), Elmhurst, IL, has submitted a proposal for funding of generic promotion campaign project from the New York State Dairy Promotion Order.

Our company, Great Lakes Cheese, has been a member of ADPI for more than 50 years and is in full support of the ADPI funding proposal. Great Lakes Cheese operates two cheese plants in the State of New York: Adams, NY and Cuba, NY. The dairy protein market is vital to keep us competitive in national and world markets. To support the sales growth of New York milk, we have financially supported ADPI's (The Strong Inside™) campaign. This campaign is now entering into its second year of delivering on its objective to increase consumer awareness on the superiority of milk proteins versus plant-based products. Our company is actively engaged in the Task Force which manages and supervises this effort.

The ADPI proposal for funding consists of: (1) an incremental contribution to the nationwide, digital marketing campaign dedicated to educating consumers about the important of proteins from milk (\$100,000) and, (2) specific elements which will target consumers in the State of New York, directly as well as through health influencers and via traditional (TV) and digital media platforms (\$47,000). Through this effort, we as the collective dairy industry, desire to increase our market share of the global protein market.

The Strong Inside™ campaign is currently supported by a number of other companies operating in the State of New York, including Cayuga Milk Ingredients, Agri-Mark Inc, O-AT-KA Milk Products Co-op, and Sorrento/Lactalis. This campaign is truly pre-competitive because the >50 representative funding companies are a mix of domestic and foreign suppliers, co-ops, trade associations and other dairy organizations.

It is our hope that the Board of the New York State Dairy Promotion Order reviews the ADPI funding proposal favorably, as we are confident its implementation will help support our company and other New York based milk protein manufacturers to increase sales of New York made milk proteins both domestically and internationally.

Sincerely,

A handwritten signature in blue ink, appearing to read "Dan Zagzebski".

Dan Zagzebski
President and CEO
Great Lakes Cheese



September 18, 2020

Dear Board of Directors of the NY Dairy Promotion Order:

The non-profit trade association American Dairy Products Institute ("ADPI"), Elmhurst, IL, has submitted a proposal for funding of generic promotion campaign project from the New York State Dairy Promotion Order.

Our company, Lactalis American Group, is in full support of the ADPI funding proposal. We desire to grow sales of New York milk, and to this end, we have financially supported ADPI's (The Strong Inside™) campaign. This campaign is now entering into its second year of delivering on its objective to increase consumer awareness on the superiority of milk proteins versus plant based products. Our company is actively engaged in the Task Force which manages and supervises this effort.

The ADPI proposal for funding consists of: (1) an incremental contribution to the nationwide, digital marketing campaign dedicated to educating consumers about the important of proteins from milk (\$100,000) and, (2) specific elements which will target consumers in the State of New York, directly as well as through health influencers and via traditional (TV) and digital media platforms (\$47,000). Through this effort, we as the collective dairy industry, desire to increase our market share of the global protein market.

The Strong Inside™ campaign is currently supported by a number of companies operating in the State of New York, including our company, Cayuga Milk Ingredients, in addition to Agri-Mark Inc, Great Lakes Cheese, O-AT-KA Milk Products Coop, and Sorrento/Lactalis. This campaign is truly pre-competitive because the >50 representative funding companies are a mix of domestic and foreign suppliers, coops, trade associations and other dairy organizations.

It is our hope that the Board of the New York State Dairy Promotion Order reviews the ADPI funding proposal favorably, as we are confident its implementation will help support our company and other New York based milk protein manufacturers to increase sales of New York made milk proteins both domestically and internationally. Our company since inception in 2014 has desired to sell more milk proteins, and in turn, we will source more high quality New York milk to do so.

We hope you agree, like we did, that the The Strong Inside™ campaign is a cause worthy of financial support to increase sales of NY milk.

Yours Truly,

Thierry Clement
CEO of Lactalis North America

Yann Connan
Vice President of Sales Lactalis Ingredients

UPSTATE NIAGARA
COOPERATIVE, INC.

General Office
25 Alton Road West
Buffalo, NY 14227

Membership Services
743 Dwight Street, Suite 2
Batavia, NY 14020

Information Technology
100 Amherst Road
Buffalo, NY 14227

Buffalo Feed Plant
1700 Lake Road
Buffalo, NY 14227

Member's Club House
25 Fulton Avenue
Batavia, NY 14020

Upstate Farms Dairy, LLC
2401 Laramie Street
Batavia, NY 14020

Older Farms Dairy, LLC
4600 State Street
Batavia, NY 14020

Upstate Producers Union
1822 North Amherst Street
Buffalo, NY 14227

Northwestern Dairy, LLC
22 Geneva Avenue SE
Northwestern, NY 14627

Upstate Dairy Process, LLC
4627 Main Street
Batavia, NY 14020

O-AT-RA Milk Products
Cooperatives, Inc.
100 E. North Street
Batavia, NY 14020

September 4, 2020

Dear Board of Directors of the NY Dairy Promotion Order:

The non-profit trade association American Dairy Products Institute ("ADPI"), Elmhurst, IL, has submitted a proposal for funding of generic promotion campaign project from the New York State Dairy Promotion Order.

Our Cooperative, Upstate Niagara, is in full support of the ADPI funding proposal. We desire to grow sales of New York milk, and to this end, we have financially supported ADPI's (The Strong Inside™) campaign. This campaign is now entering into its second year of delivering on its objective to increase consumer awareness on the superiority of milk proteins versus plant-based products. Through our majority owned subsidiary, O-AT-RA Milk Products Cooperative, our organization is actively engaged in the Task Force which manages and supervises this effort.

The ADPI proposal for funding consists of: (1) an incremental contribution to the nationwide, digital marketing campaign dedicated to educating consumers about the important of proteins from milk (\$100,000) and, (2) specific elements which will target consumers in the State of New York, directly as well as through health influencers and via traditional (TV) and digital media platforms (\$47,000). Through this effort, we as the collective dairy industry, desire to increase our market share of the global protein market.

The Strong Inside™ campaign is currently supported by a number of dairy companies operating in the State of New York, including Upstate Niagara, Cayuga Milk Ingredients, Agri-Mark Inc, Great Lakes Cheese, O-AT-RA Milk Products Coop, and Sorrento/Lactalis. This campaign is truly pre-competitive because the 50+ representative funding companies are a mix of domestic and foreign suppliers, coops, trade associations and other dairy organizations.

I hope the Board of the New York State Dairy Promotion Order reviews the ADPI funding proposal favorably, as I'm confident its implementation will help support our Cooperative and other New York based milk protein manufacturers to increase sales of New York made milk proteins both domestically and internationally. Upstate Niagara Cooperative and it's farmer owners have a demonstrated history of investing in New York State dairy processing/manufacturing. I believe your support of The Strong Inside™ campaign will help facilitate increased sales of New York State milk products.

Sincerely,



Lawrence C. Webster
Chief Executive Officer

UPSTATE



Q&A

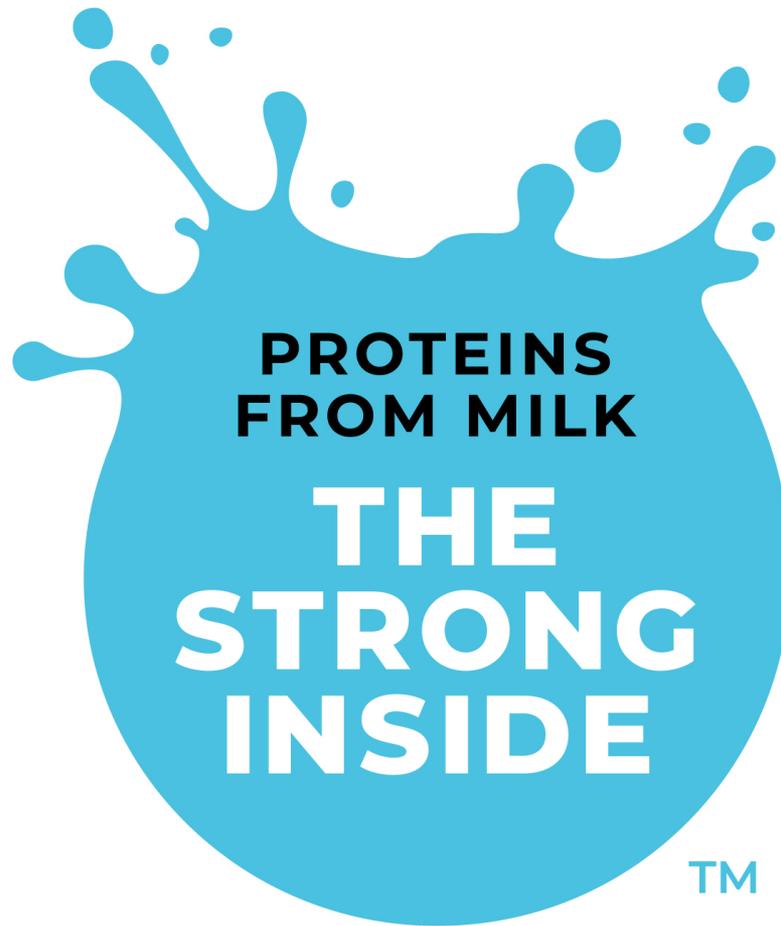




September 25, 2020
V. LAGRANGE, B. ANDERSON
AMERICAN DAIRY PRODUCTS
INSTITUTE
vlagrange@adpi.org
banderson@adpi.org
Thestronginside.com

Thank you!





[The Strong Inside video](#)