Dairy Management Inc.
2022 Mid-year Highlights

New York DPO Advisory Board

July 25, 2022

Paul Ziemnisky
Group Executive Vice President
Head of Wellness, Insights, & Innovation
Dairy Management Inc.
2022 Unified Marketing Plan
2022 Priority Initiatives

1. Secure dairy’s place with the next generation of consumers
2. Grow new opportunities for international & domestic sales
3. Demonstrate the dairy industry’s leadership as an essential, sustainable food source
4. Long-term, industry-wide transformation
DMI Plan is Based Upon Principles of Powerful Research, Insights, and Partnerships

ADVANCE NUTRITION, PRODUCT & ENVIRONMENTAL SCIENCE, & CONSUMER INSIGHTS

ACTIVATE WITH & THROUGH DAIRY COMMUNITY & POWER PARTNERS

INFORM & ENGAGE WITH CONSUMER, THOUGHT LEADERS, & INFLUENCERS

INCREASED SALES & TRUST
Leveraging Commercial Partners to Build Sales & Trust for Dairy both Domestically & Globally
International Partners Plan
Focus Areas

- Pizza Expansion
- Grow Value Added Exports
- Expand into New Markets
US Cheese Marketing support: Korea and Japan
YTD Highlights - Dominos

First Half Results

Middle East

- UAE: Strong sales and U.S. cheese growth in first half of 2022
  - In the 12 months ending in April, U.S. cheese volume doubled vs. the same period the prior year

- Saudi Arabia: Launched New Yorker in May
  - 1st time for Saudi Arabia, relaunch in UAE
  - Uses 20-25% more cheese than a medium or large pizza

Japan

- Japan: Opened 368 since partnership began, for total of 918 in Japan
  - Launched two cheesy items:
    - New Yorker, with authentic ingredient positioning
    - Cheese Burst, return of cheese-heavy crowd-pleaser
YTD Highlights - Dominos Taiwan

Taiwan

First Half Results

• Leveraged successful cheesy launches and campaigns from Japan in H1
  • Ultra cheesy 1Kg
  • Quattro (top selling line of pizzas)
Domestic Plan Focus Areas

- Existing Partners Deeper Engagement
- New Partner & New Growth Spaces
- Lead Fluid Milk Revitalization
YTD Highlights

June Dairy Month and Domino's Rally
YTD Highlights

Increase Relevance with Youth

- Yoplait Vanilla + Lucky Charms
- Yoplait Cinnamon Vanilla + Cinnamon Toast Crunch
- Yoplait Strawberry + Trix
- Yoplait Vanilla + Cocoa Puffs

Smoothies in Schools

- Go Gurt Frozen Pops with Yoplait Vanilla + Cocoa Puffs
- Back to school Smoothies in Schools

Increase Relevance with Youth
YTD Highlights

DMI and ADANE hosted Amazon Fresh marketers on two dairy farms in upstate NY on June 7
Fluid Milk: YTD Highlights

- TruMoo relaunch
- Selling in 3 new products for launch late '22
- Claims on Packaging

- Aseptic bottles available for 2022-2023 school bids

New Partner first-of-its-kind natural sports drink that’s been scientifically shown to provide rapid and long-lasting hydration by harnessing the electrolytes and carbohydrates from the goodness of milk.
Chocolate Milk in NYC Schools

Provided support with ADANE’s effort to keep flavored milk in New York Public Schools this spring. Working collectively with the dairy industry and providing research/talking points on the importance of dairy (specifically flavored milk) in children’s diets.
Building Trust In & Sales of Dairy Via Communications
Strategic Wellness Territories
Reset Yourself with Dairy

- **IMMUNITY**: Protecting overall health
- **CALM**: Providing emotional well-being to take on the day
- **ENERGY**: Sustaining mind and body through the day
- **DIGESTIVE HEALTH**: A healthy gut and lactose free options
Science Activation: Consumer Marketing

Dairy Good - Consumer Marketing

When Bryna says your fun fact right before you were gonna say it, it can be stressful. Reset yourself with dairy.

CALM

Dairy Good - Consumer Marketing

Looking for a way to catch up on somezzzz? Try drinking a glass of milk before bed. It just might help you get a better night's sleep.

Dairy MAX

March 11

It can be tough to get enough vitamin D from the sun, even in March. But three daily servings of milk get you 45% of your daily value.

IMMUNITY

Boost Your Immunity in 2022

Provides vitamins A and D, proteins, and minerals.

Fruits and vegetables provide vitamins C, A, and B.

Yogurt has protein and is a great source of probiotics.

Vitamin D: Dairy’s Immune Boosting Nutrient

If you watch the news or scroll through your social feeds, you’ve likely heard something about the benefits of vitamin D. This nutrient is known for its role in bone health, but it also has a significant impact on the immune system.

Dairy provides vitamin D in a form that is easily digestible by the body. It’s absorbed via the intestine, which means that dairy is one of the best sources of vitamin D to include in your diet.

So, how much vitamin D do you need? The recommended daily intake varies depending on age and life stage, but generally, adults need 200-300 IU per day. By incorporating dairy into your daily routine, you can ensure that you’re getting enough vitamin D to support your health.
Science Activation: People of Color Benefits Advertising

STRONG IMMUNE SYSTEM

NUTRIENTS TO SUPPORT A HEALTHY IMMUNE SYSTEM. SHOP NOW

GRANDMA’s RECIPES

SAY YES TO GRANDMA’S RECIPES WITH LACTOSE-FREE DAIRY MILK. SHOP NOW

TOP OF MY GAME

NUTRIENTS TO KEEP YOUR GAME STRONG. SHOP NOW

100 IN THE KITCHEN

LOSE THE LACTOSE, NOT THE TASTE. SHOP NOW
Science Activation: Messaging Tests with Gen-Z and African American Audiences

AD Milk Aisle (based on local grocer or user preference)
Science Activation: Health Professional Activations

Pediatrician & Parent Pilot

**Dairy Every Day is the Healthy Way**
Dairy foods help healthy brains, bones, and bodies grow.

**Reset Yourself with Dairy**
Activation of Science

**Vitamin D** is a key nutrient that helps support:
- Immune system
- Emotion & behavior
- Calcium

Sources of Vitamin D:
- Dairy milk
- Fortified cereals
- Mushrooms
- Eggs
- Sunshine
- Fish (salmon, canned tuna, fortified)

Also can improve bone and muscle strength!

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dairygood • Following ...

do the cold winter months make you feel sort of down and even sluggish? Don’t worry, that’s legit all of us. THIS IS A THING. We have some nutrition science to explain this and what we can do to take care of yourself.

- Depending on the climate you live in, the winter months have longer periods of darkness, which means you may not be getting enough sunlight. In other words, you may need more of the “sunshine” vitamin D! #FYI: most of the world’s vitamin D comes from the sun! ☀️
- But don’t worry, some foods contain vitamin D too.
- PRO TIP: Try to incorporate food sources of vitamin D into your meals like fish (salmon, canned tuna), fortified...
Science Activation: DMI Science Fueling
MilkPEP Claims - $50M

SUPPORTS A HEALTHY IMMUNE SYSTEM.
<table>
<thead>
<tr>
<th>Science</th>
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<td>New Platforms</td>
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<td>New Partners</td>
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<td>Health Professional Outreach</td>
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## Science Discovery: DMI and Mayo Clinic Collaboration

<table>
<thead>
<tr>
<th>SCIENTIFIC RESEARCH</th>
<th>EDUATION AND OUTREACH</th>
<th>DIGITAL TRANSFORMATION</th>
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<td>• Master Service Agreement approved.</td>
<td>• Advance shared science around the role dairy foods, particularly whole milk dairy foods, in cardiovascular and metabolic conditions.</td>
<td>• Execute education and outreach to healthcare professionals and consumers.</td>
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<td>Goals:</td>
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<td>• Leverage technology to advance dairy science and benefits.</td>
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American Academy of Pediatrics, influential parenting partner.

Through AAP, we will elevate dairy’s benefits to practicing pediatricians, pediatric residents, and medical students, as well as the families they work with and media.

NMA is the largest medical association of African American physicians, with a membership of over 80,000.

Working with NMA on a dedicated journal supplement and consensus statement on dairy in the diets of African Americans as part of a pathway to wellness.
Dairy Science: Pediatrician Engagement

Qualitative Research: Most Compelling Areas for PCS & Parents

Brain Health  Bone Health  Growth & Development  Immunity

Pediatricians

Dairy foods help healthy brains, bones, and bodies grow.
Dairy Science: Pediatrician Engagement

Tool Kit

Intro Letter

Parent Education Tool
- English and Spanish
- Hardcopy tearpad and digital

Poster for office

PCS Educational Resource
- Key messages to deliver to parents
- Evidence-based foundation
- Links to research and authoritative statements
- Hardcopy and digital

PCS Educational Presentation for Lunch & Learn
### Measurement and Impact

#### 2021 UMP Measurement Results

- **+250M** milk pounds Equivalent (MEP) from foodservice partners, 39% avg growth since inception.
- **46 new items launched:** 29 national, 17 SIBs.
- **13%** growth of US cheese with existing Intl. partners over the past two years.
- **38%** volume growth from Dominos expansion into MENA.
- **+$48M** DMI science & partners driving Value Added Milk Growth vs. Plant-Based from 16 to '21, (2014M vs. 2016M).

#### 2021: Delivering results today with eye on future growth

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<tr>
<th>Category</th>
<th>Metric</th>
<th>Details</th>
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<tr>
<td><strong>SALES</strong></td>
<td><strong>+250M</strong></td>
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<td><strong>TRUST</strong></td>
<td><strong>5.3B</strong></td>
<td>impressions secured, nationally*</td>
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<td><strong>+$8</strong></td>
<td>return on ad spend, 4x industry avg. for Undeniably Dairy execution</td>
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<td><strong>+5%</strong></td>
<td>lift in consumer’s agreement that “dairy fits my lifestyle”</td>
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<td><strong>+3%</strong></td>
<td>lift in consumer perceptions that “dairy is nutritious”</td>
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<td><strong>+400</strong></td>
<td>campaigns reached with marketing content</td>
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<td><strong>GLOBAL POSITIONING</strong></td>
<td><strong>+$450</strong></td>
<td>farms engaged in NZI initiatives</td>
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<td><strong>+$36M</strong></td>
<td>total grants and partnership support for environmental stewardship</td>
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<td><strong>2</strong></td>
<td>Dairy Scale for Good projects launched with Nestle and Starbucks</td>
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<td><strong>21%↑</strong></td>
<td>Dairy Sustainability Alliance® membership</td>
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<td><strong>32K</strong></td>
<td>Thought leaders engaged at &gt;150 events</td>
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*Includes contributions from DMI & Hughes.*
Thank You

Questions?