

2024

ANNUAL
REPORT



Shared Vision, Shared Success

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MESSAGE FROM DPAC LEADERSHIP

Board Chair



Four years ago, DPAC's Board of Directors adopted Strategic Objectives centered around a vision of a thriving Canadian dairy industry, trusted by consumers. Work toward achieving these objectives has been forward-looking and focused on trust-based partnerships and collaboration. These are principles that are more important than ever.

The industry engagement in the development of a Grocery Code of Conduct is just one such example. The transformation of the Code Steering Committee into the interim board of the Office of the Grocery Sector Code of Conduct marked a pivotal moment, with substantial efforts invested in developing detailed governance structures. Specific thanks goes to the leadership of Mark Taylor as DPAC's representative to the Industry Working Group and Mathieu Frigon as a member of the Steering Committee. While work continues to push for implementation of the Code, the collaboration and consensus building approach required to achieve this serves as a model for all industry efforts.

I keep this in mind as we look inwards as an industry. After a year of strained industry relations, it is time to explore new collaborative structures to guide our work together. It is not always easy to find agreement on every issue, but it is important to focus on the areas in which the industry benefits. One such example is the Dairy Industry Consultative Committee. Tasked with identifying the key priorities for the sector in the coming decade, the Committee has brought together producers and processors to envision the future to focus on what drives us all: our collective passion for dairy. We are hopeful that this important work will continue.

Trust also extends to our consumers. Increasingly, government requirements on issues like

sustainability and animal welfare are viewed as the bare minimum by our clients and consumers. To strengthen the relationship with consumers, the dairy industry needs to embrace this change. Being attuned to changing consumer and customer expectations ultimately helps the industry and each of our member companies.

The industry changes and so too does DPAC. On behalf of the DPAC Board of Directors, I welcome new members and wish to recognize the contributions of departing member representatives. This includes Dominique Benoit who retired this year. Dominique served as DPAC Treasurer and lent his knowledge and expertise to a number of Board Committees, including those informing DPAC positions on policy and trade. We wish him all the best. Replacing Dominique as Treasurer is Catherine Tokarz. I also wish to take this opportunity to congratulate Dan Magliocco for his new role as President of Danone North America, and thank him for his years of contribution to DPAC.

As we navigate the evolution of Canada's dairy industry, our sector must stay committed to trust-based partnerships and consumer-centred practices. We must continue to focus on our shared vision and determination to adapt and innovate that has served DPAC and the industry so well.

Phil Vanderpol
Chair, DPAC Board of Directors

MESSAGE FROM DPAC LEADERSHIP

President & CEO



If I was asked to wrap the year up in one word, I would likely offer up 'perseverance'. The past year has seen significant milestones achieved on trade and regulatory fronts, but perseverance will continue to be needed as DPAC pushes forward on addressing key issues facing the dairy industry.

We have seen success in the conclusion of significant work to support the government's defense of Canadian dairy policy in both CUSMA and CPTPP trade panels. This brought good news as the panels recognized Canada's policy discretion in implementing both trade agreements.

Further good news was received just earlier this month with Health Canada publishing new Market Authorizations which expand Front-of-Package Nutrition Labeling exemptions for dairy products and allow for a wider range of products to be fortified with Vitamin D. The evidence-based approaches that were taken to achieve these results continue to be applied to other regulatory files, including our work to end the use of the term "modified milk ingredients".

Significant work continues on a number of key files related to the 'Creating a Sustainable Business Model' pillar of our Strategic Objectives. This includes a push for dairy processors to be recognized as equal partners in the dairy supply management system. At present, legislation fails to recognize the unique and crucially important role that processors play in ensuring that Canada has processing capacity and producers have viable markets for their milk.

Looking more broadly at the grocery sector, DPAC continues to advocate for a mandatory and enforceable Grocery Code of Conduct until all retailers sign on. Our resolve on this position has only strengthened as major retailers' resistance

last fall stalled progress toward the implementation of the Code and its mechanisms. We were heartened by the Federal Government's statements that it intends to regulate in absence of voluntary participation, and are hopeful that process will be made following Loblaw recent support for the Code.

Addressing these issues are essential to ensuring future growth, investment and innovation in the dairy processing sector and will remain at the forefront of DPAC's advocacy work over the next year.

However, we know that this work cannot be completed by DPAC alone. Our successes this past year have been achieved through fruitful collaboration with our key partners. This year has been a challenging period for collaboration between dairy industry partners, but we are hopeful that we will be able to identify common ground and work toward solutions that benefit everyone in the industry.

Finally, I want to recognize the DPAC team who has demonstrated incredible patience and perseverance in their efforts to advocate on behalf of the industry. Special thanks goes to Marie Ly who departed DPAC this spring; her work over the past five years on policy and regulatory files has laid a strong foundation for the industry's future. We wish Marie all the best in her new role.

As we look to the year ahead, I am confident in DPAC's ability to find opportunities to collaborate with key partners to address key issues and, above all, champion a sustainable future for the dairy industry.

Mathieu Frigon
President and Chief Executive Officer

STRATEGIC PRIORITIES

2020-2024



MISSION

To provide leadership and advocate for a consumer focused, sustainable dairy industry through trust-based partnerships

VISION

A thriving Canadian dairy industry, trusted by consumers



Collaborating, Engaging, Influencing

As the recognized national voice of dairy processors, work collaboratively with provincial associations to increase the influence of the dairy processing industry with governments across Canada.

- Regulatory affairs and dairy policy
- International trade policy
- Representation of small and medium dairy processors



Building Consumer and Customer Confidence and Trust

Build consumer and customer confidence and trust in the dairy sector.

- Animal welfare
- Environmental sustainability
- Milk quality and traceability



Creating a Sustainable Business Model

Develop a sustainable business model from farm to consumer which supports a growing Canadian dairy sector.

- Modernization of supply management system
- Address broader agri-food issues (i.e., Grocery Code of Conduct)

COLLABORATING, ENGAGING, INFLUENCING

Expanding dairy-related Front-of-Package Nutrition Labeling Exemptions

The work of DPAC and DFC to advocate for an evidence-based approach to Front-of-Package Nutrition Labeling (FOPL) has successfully led to further exemptions for dairy products. In July 2023, Health Canada noted that it supported exemptions for fine and fresh cheeses in order “to mitigate the concern that the FOPL nutrition symbol could negatively impact calcium intakes, the regulations include an exemption for cheese or yogurt – including drinkable yogurt – that are made from dairy products, buttermilk and kefir.”

This is a significant milestone for dairy. With a significant number of dairy products exempt from FOPL regulations, Canada becomes a world leader in recognizing dairy’s nutritional benefits. These exemptions will come into force with the registration of the Market Authorization published in Canada Gazette II on June 5, 2024.

Expanding consumer choice through new Vitamin D fortification

After close to 15 years of advocacy work, the number of dairy products eligible for Vitamin D fortification is set to increase soon. In June 2024, Health Canada published Market Authorizations in Canada Gazette II, a final step in approving changes to regulations which will allow dairy processors in Canada to fortify yogurt, drinkable yogurt and kefir with Vitamin D. This move will align Canada’s regulations with those of the United States and several European countries. Consumers will benefit from the updated regulations. It is estimated that 20% of the

Canadian population is Vitamin D deficient. Yogurt, drinkable yogurt and kefir are popular snacks that will provide an additional vehicle to deliver this important nutrient to Canadians struggling to meet the daily recommended intake.

To provide dairy processors and consumers with maximum choice, DPAC has advocated for a flexible approach to vitamin D fortification. Regulations that are voluntary, rather than mandatory, and based on an acceptable range with maximum permissible levels rather than a single value amount acknowledges the complexities of yogurt and kefir production process and supports individual processors’ in meeting various competing labeling regulations and guidance.

Advocating for changes to proposed Marketing to Children regulations

DPAC continues to advocate for proposed Marketing to Children regulations to be aligned with FOPL regulations. As was the case with FOPL, DPAC believes that these regulations must recognize the significant contribution of dairy

RESOURCES

- [Marketing Authorization to Permit a Lower Calcium Threshold for Exemptions from the Requirement for Prepackaged Products to Carry a Nutrition Symbol in the Case of Cheese, Yogurt, Kefir and Buttermilk](#)
- [Marketing Authorization for Vitamin D in Yogurt and Kefir](#)



products to a healthy diet for children. The proposed regulations focus on a three nutrients approach: sodium, sugar, and saturated fat. This means that nutrient-poor foods will be exempted from the regulations while nutrient-rich healthy foods, like dairy products, will be subject to strict restrictions.

DPAC's advocacy efforts have focused on requests for regulations to allow for product exemptions for dairy similar to those in FOPL. Efforts have also included requests for a longer implementation timeline which acknowledges the significant work and financial resources required to revise product marketing and branding plans. This is especially important in light of numerous other labeling changes in recent years, such as FOPL, ingredients labeling changes, and regulations for recyclability labeling.

Addressing misconceptions of 'Modified Milk Ingredients'

Work continues to advocate for changes to CFIA's ingredient labeling regulations to remove the word "modified" from the term "modified milk ingredients" (MMI). This is a pressing issue for the industry and increasingly a focus for DPAC's advocacy efforts. Research shows that the terminology is confusing for consumers who worry that "modified" means genetically and/or chemically modified. These misconceptions not only hinder consumer trust, but also place dairy products at a competitive disadvantage when compared to plant-based products.

This issue is further compounded by the fact that new ingredients do not necessarily have to carry the weight of "modified". For example, Health Canada has determined that a component of whey that is made in lab is safe for consumption. Despite being derived from genetically modified yeast, this ingredient can simply be listed as "yeast-derived whey protein" on the ingredient

list. This again showcases the competitive disadvantage that government regulations impose on traditional dairy ingredients by requiring products to carry the word "modified".

Progress on this important issue has unfortunately been very slow, but DPAC is hopeful that producers and processors can work together to prioritize advocacy on this important change which would significantly benefit the sector and its consumers.

Ensuring that regulatory modernization works for dairy processors

The past year saw Health Canada and the Canadian Food Inspection Agency (CFIA) begin the process of modernizing compositional standards contained in both the Food and Drug Regulations (FDR) and Safe Food for Canadian Regulations (SFCR). DPAC has been actively engaged and is especially proactive in requests related to long-standing changes to dairy compositional standards.

Of note, DPAC and DFC have collaborated to request changes to allow potato starch as an alternative to cellulose in grated and shredded varieties of cheese requiring an anticaking agent.





At present, potato starches are not permitted anticaking agents. However, the pandemic highlighted the issues stemming from processors' having a limited range of permitted additives available to them. Supply chain disruptions were exacerbated by the fact that a small number of companies manufacture food cellulose. DPAC's work aims to ensure that processors have good additional options as they work to manufacture products that meet consumer expectations. Advocating for additional changes to dairy compositional standards remains a priority for 2024.

Trade panels recognize Canada's TRQ allocation policy discretion

DPAC has been actively involved in government efforts to respond to challenges from trading partners in dispute panels for the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and Canada-United States-Mexico Agreement (CUSMA). DPAC worked closely with government officials to support the defense. Throughout the process, DPAC was impressed by the level of collaboration and partnership demonstrated by Minister Ng and Government of Canada officials, and was once again thankful for their strong defense of Canada's position.

Comprehensive and Progressive Agreement for Trans-Pacific Partnership

In September, a CPTPP dispute settlement panel made two important findings. First, that Canada's practice of creating TRQ pools exclusively for processors is inconsistent with Canada's obligations under the agreement. This mirrors the finding of the CUSMA Panel decision on the same issue in 2021.

More positively, the panel also found that Canada's inclusion of additional criteria for eligible

applicants for a TRQ allocation falls within the discretion provided to Canada in designing its allocation mechanism, and is therefore consistent with Canada's CPTPP obligations. DPAC views this as a very important recognition.

In a joint statement, the Ministers of International Trade and Agriculture and Agri-Food, the Hon. Mary Ng and the Hon. Lawrence MacAulay stated:

"Canada is very pleased with the outcome of the panel's report which is a clear victory for Canada. The Panel has made a significant finding by recognizing Canada's discretion to set TRQ allocation policies, including determining who is eligible to obtain an allocation. We will not negotiate these allocations with countries who seek to weaken Canada's supply management system.



RESOURCES

- › [DPAC Statement on CPTPP's Final Panel Report on Canada's TRQ Allocation Mechanism](#)
- › [CPTPP reaffirms Canada's dairy supply management system](#)
- › [DPAC Statement on CUSMA's Panel Report on Canada's TRQ Allocation Mechanism](#)
- › [Canada welcomes CUSMA dispute settlement panel findings on dairy tariff rate quotas](#)



Canada-United States-Mexico Agreement

In November, the CUSMA Panel released its findings on the US challenge of Canada's administration of its dairy tariff rate quotas (TRQ). The CUSMA Panel report confirmed that the Government of Canada abided by its CUSMA trade obligations when it revised its dairy TRQ allocation methodology following the release of the first dispute settlement panel's report in January 2022. This revision was done in light of the first Panel's ruling and followed consultations with industry stakeholders. This decision will help provide the dairy sector with greater certainty and stability going forward.

Representing dairy processors on Parliament Hill

DPAC has been hitting the pavement meeting Members of Parliament, Ministers and government officials to talk about key issues. This has included meetings in Ottawa, attending industry conferences and workshops, and conducting riding visits. A highlight of these efforts was a holiday cocktail reception held at the prestigious Rideau Club. During the event, DPAC members and colleagues from provincial processor associations mingled with Members of Parliament.

Representing dairy processors interests in key dairy forums

This year, DPAC was once again hard at work coordinating and defending processor interests at the Canadian Milk Supply Management Committee (CMSMC), industry Working Groups and at the Canadian Dairy Commission (CDC). DPAC aims to provide expert analysis to ensure that dairy policy balances the needs of key stakeholders and is based on sound evidence.

This work has included successful efforts to lobby the CDC to adjust the regulated make allowance of butter. Building on this, the CDC and DPAC are collaborating to complete a new survey on the cost of processing butter and skim milk powder to inform the development of a new methodology for calculating the regulated make-allowance.

DPAC has also been actively participating in the development of the CMSMC's Market Growth Program aimed at supporting sustainable and innovative investment projects, especially in the use of solids-non fat (SNF). DPAC aims to ensure this program is developed to support long-term growth of Canada's dairy processing industry.



DPAC's Mathieu Frigon and MP, Yves Perron

RESOURCES

- ▶ [Market Growth Program \(MGP\), Canadian Dairy Commission](#)

BUILDING CONSUMER AND CUSTOMER CONFIDENCE AND TRUST

Collaborating to strengthen animal welfare

DPAC has taken numerous important steps to strengthen collaboration with partners to advance matters related to animal welfare. Meeting consumer expectations on this important issue requires a partnership between producers and processors at all levels.

As such, DPAC is pleased by the collaboration between DPAC, the Western Dairy Council (WDC) and the Western Milk Pool (WMP) which led to the development of an animal welfare policy and a memorandum of understanding. These documents outline the formal process and communications protocols to be used in cases of animal abuse in western provinces.

This spirit of collaboration carried through work between the DPAC Animal Welfare Committee and Dairy Farmers of Canada to establish a formal consultation process which facilitates the sharing of information regarding animal welfare. Following an initial pilot period, the process has been extended to allow DPAC Animal Welfare Committee members to participate in DFC meetings related to animal welfare. The process will be reviewed again in September 2025. Customers and clients of dairy processors are ever more demanding, and this collaboration builds on DPAC's objective to support producers' efforts to continuously improve animal welfare practices on farms and implement the new Code of Practice for the Care and Handling of Dairy Cattle. Released last year, it is our hope that the on-farm assessment and validation of the new Code will start in the near future.

More broadly, the work of the DPAC team has contributed directly to animal welfare policy

development as members of the National Farm Animal Care Council (NFACC) and Animal Health Canada (AHC).

Ensuring balance in proposed recycled content regulations for plastics

As a member of the Canada Plastics Pact, DPAC and its members are supportive of the government's objective of reducing the environmental impact of primary food plastic packaging by addressing plastic waste and preventing pollution by targeting the reduction, reuse, redesign, and recycled content.

Through the DPAC Environmental Committee, the organization aims to inform government action to ensure that regulations are feasible from business perspectives, and balance sustainability aims with food safety and operational requirements.

This includes work to secure exemptions from Environment and Climate Change Canada's (ECCC) proposed Recycled Content regulations for milk and dairy beverage containers which require opaque packaging to protect the products' nutritional properties. The limited supply of food grade recycled resin currently available in Canada presents a major hurdle for dairy processors in their attempts to transition to packaging with recycled content. ECCC's exemptions from proposed Recycled Content regulations acknowledge this difficulty. DPAC would like to see proposed Recyclability Labeling requirements also acknowledge this hurdle and provide exemptions for dairy products. Despite exemptions from Recycled Content regulations,



the recyclability labeling regulations would require these products to carry “non-recyclable” labels. DPAC worries this will negatively impact consumer perceptions and is asking for these products to be exempted until 2030.

Work also continues to respond to ECCC plans to require retailers to create individual pollution prevention (P2) plans. DPAC has raised concerns that this could lead to a proliferation of diverse requirements across Canada. It is calling for a national P2 plan to be developed in consultation with the whole value chain: suppliers, manufacturers and retailers.

Underlying DPAC’s work on plastics has been the call for strong Federal Government leadership in leading a whole of industry approach from package manufacturers to retailers. This will ensure that solutions address challenges both upstream (i.e., reuse-refill, packaging/product design, collection) and downstream (i.e., sorting, recycling) and will support the creation of a truly circular economy.

Working Towards Net-Zero Greenhouse Gas Emissions by 2050

In 2022, DPAC’s Board of Directors adopted a resolution for dairy processors in Canada to achieve net-zero greenhouse gas (GHG) emissions by 2050. To attain this objective, Board members endorsed the use of the Science-Based Targets initiative (SBTi) methodology, a rigorous approach that aligns emission reduction targets with the latest climate science.

The association has since embarked on a journey to define specific GHG emission targets for dairy processors in Canada. This initiative will involve a detailed process, incorporating industry insights to establish achievable yet ambitious targets in line with our commitment to environmental stewardship.



The DPAC team with the Hon. Steven Guilbeault, Minister of Environment and Climate Change of Canada

DPAC contracted Groupe Agéco, a firm known for its expertise in environmental impact studies, to assist the association in developing GHG emission targets using the SBTi methodology. Their work began by assessing the current state of dairy processors through a comprehensive literature review and interviews with processors. This first study enhanced our understanding of the availability of climate data and awareness levels amongst the processor community, collected and analyzed existing GHG data, documents and policies, and helped define the scope of a broader project and activities to undertake. Based on this first report, Groupe Agéco proposed distinct pathways for DPAC’s GHG emissions reduction strategy which will inform the next steps of this project.

Looking ahead, DPAC intends to move forward with the next step in this project which will focus on defining industry-wide GHG emissions reductions targets based on Groupe Agéco’s initial recommendations.

CREATING A SUSTAINABLE BUSINESS MODEL

Advancing a Grocery Code for Canada

No issue has required more perseverance than the development of a Grocery Sector Code of Conduct. DPAC representatives have worked closely with other industry leaders over the past two years to collaboratively draft the final Code and develop the mechanisms to oversee its application, such as the Office of the Grocery Sector Code of Conduct (OGSCC) by-laws and operating rules. The OGSCC, a voluntary membership-based organization, was officially incorporated on November 2, 2023.

Despite achieving these important milestones, progress on the Code was stalled at the last minute resistance of two major retailers, Walmart and Loblaws. Without the support of all major grocery retailers, the OGSCC is unable to proceed with launching and implementing the Code. DPAC has used this example to highlight its long-standing position that the existing voluntary approach does not serve the Code's goals. Proceeding without full support creates an unlevel playing field and could put complying stakeholders at a disadvantage.

Following ministerial and industry pressure, Loblaws indicated in May 2024 that it would sign on to the Code if all major retailers adhere to it. However, whether Walmart and Costco will follow Loblaws in supporting the Code remains to be seen.

In this context, DPAC continues to lobby for a mandatory and enforceable Code. Positive signals have been sent by both the Minister of Agriculture and Agri-Food and the Minister of Innovation, Science and Industry through public statements putting pressure on retailers and

noting that all options remain on the table to ensure a Code comes into effect.

Calling for an End-to-End Sustainable Business Model

As DPAC pushes forward in its efforts to modernize Canada's dairy industry, it has increasingly focused its work on advocating for



Speaking with MP David Epp about the Grocery Code

RESOURCES

- ▶ [Ministers MacAulay and Lamontagne issue statement on Grocery Sector Code of Conduct](#)



formal recognition of dairy processors in the Canadian Dairy Commission Act (CDC Act) and other industry agreements.

At present, the CDC Act does not formally recognize the role of dairy processors. This historical oversight fails to recognize processors' significant contributions, putting them on par with retail and food service industries despite dairy accounting for a very small portion of those industries' overall sales. Acknowledging processors as equal partners in the dairy supply chain is crucial for sustainable industry growth and requires urgent reform.

DPAC has been speaking to government officials and producer groups to highlight the important need for legislation and frameworks to recognize the pivotal role that processors play in Canada's dairy supply management system. Over the next year, work will continue to advocate for the important move in support of growth, investment and innovation in the industry.

Funding the future of Canada's supply managed processing sectors

In September 2023, the government announced the creation of the Dairy Innovation and Investment Fund (DIIF). With an overall budget of \$333 million over the next 10 years, the DIIF aims to help dairy processors in Canada make investments that increase their competitiveness and adapt to new market realities.

Importantly, this new program will support the much-needed investments in milk processing capacity in Canada. The DIIF aims to support the industry's efforts to better respond to Canada's growing solids-non fat (SNF) surplus and minimize non-marketed skim milk. The program will see the Federal Government provide non-repayable funds matching dairy processor's

investments in medium and large-scale projects that help them to modernize, replace and/or increase their SNF processing capacity.

The DIIF is one of a number of programs launched as part of the Federal Government's commitment to address the impacts of trade agreements on Canada's dairy supply management system.

RESOURCES

- ▶ [DPAC statement on the Dairy Innovation and Investment Fund announcement](#)
- ▶ [Minister MacAulay launches new program to support the Canadian dairy sector](#)

GOVERNANCE

New Members

DPAC is dedicated to representing all dairy processors, including small and medium-sized companies. This year, DPAC's membership expanded as it welcomed one new primary member, Vodkow, and one new associate member, Barry Callebaut.

Changes to the DPAC Team

Over the past year, the DPAC team has seen a few changes. Vice-President of Regulatory Affairs, Marie Ly, departed for a new position within the industry. Chathurika Dayananda assumed a new role as DPAC's Director of Regulatory Affairs and Member Relations. Last fall, DPAC welcomed Jean-Michel Laurin who brings extensive experience to the table as a Special Advisor in Government Relations.

Changes to DPAC Board of Directors

Dominique Benoit retired this year after a long career with Agropur Cooperative and resigned from his role with DPAC. Dominique served as DPAC Treasurer from 2017-2023 and lent his knowledge and expertise to a number of Board Committees, including those informing DPAC positions on dairy policy and trade. DPAC wishes him all the best in his well-deserved retirement.

With Dominique's departure, Catherine Tokarz (Saputo) was elected to the role of Treasurer. Richard Sanchez (Agropur Cooperative) was elected as the Executive Committee's Member-at-Large. The Board also welcomed Brendan Wall (Agrifoods Cooperative) and Vanessa Conforti (Fairlife-Coca-Cola) as new directors this year.



L-R, Omid McDonald (Vodkow), Jean-Michel Laurin, Ons Dhaoui, Chathurika Dayananda, and Mathieu Frigon

DPAC BOARD OF DIRECTORS

EXECUTIVE

Phil Vanderpol, Chair
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Gilles Froment, Secretary
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Hans Dairy Inc.

Richard Sanchez, Member-at- Large
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Mike Langdon
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