

USDEC Board of Directors Meeting

AGENDA

APRIL 6-8, 2016 • SWISSÔTEL
323 East Upper Wacker Drive, Chicago

(Agenda as of March 24)



WEDNESDAY, APRIL 6, 2016

TIME	ACTIVITY	LOCATION
4:00 pm–6:00 pm	Trade Policy Committee Meeting <i>(designated and invited committee members only)</i>	Lucerne Room I

THURSDAY, APRIL 7, 2016

TIME	ACTIVITY	LOCATION
6:00 am	Finance Committee Meeting <i>(committee members only)</i>	Lucerne Room I
	Registration, Continental Breakfast	Lucerne Foyer

GENERAL SESSION

7:30 am–8:10 am	Opening and Welcome Remarks <ul style="list-style-type: none">• Paul Rovey, chairman, U.S. Dairy Export Council (USDEC)• Tom Suber, president, USDEC• Tom Gallagher, CEO, Dairy Management Inc. (DMI)	Lucerne Room II, III
8:10 am–9:10 am	Huntsman on China—Revisited <ul style="list-style-type: none">• Jon M. Huntsman Jr., former Ambassador to China and former Utah governor• David Ahlem, chief executive officer and president, Hilmar Cheese Company (<i>moderator</i>)	Lucerne Room II, III

In 2012, with China's economic growth engine in high gear, Jon Huntsman, former ambassador to China, riveted USDEC members with a detailed account about the country's economic, political and cultural challenges. Now, nearly four years later, with a decline in China's currency as well as a dramatic market downturn and stock market turmoil, USDEC will bring back Huntsman to discuss China's economic transition from exports, investment and heavy industry to consumption and services. How will China's new economic policy affect its global growth and what does it mean for U.S. exporters? Hear Huntsman and moderator David Ahlem, chief executive officer and president of Hilmar Cheese Company.

TIME	ACTIVITY	LOCATION
9:10 am–10:15 am	<p>Global Market Outlook: EU Ambition and U.S. Position</p> <ul style="list-style-type: none"> • Christophe Lafougère, director, GIRA Consultancy and Research • Marc Beck, executive vice president, strategy and insights, USDEC (<i>moderator</i>) <p>Since quota abolition in April 2015, as well as with the loss of the Russian market and expansion of FTAs, the European Union has emerged as an aggressive exporter building volumes and market share in key import markets, and positioning itself as the market driver and the primary competition for U.S. dairy exporters. In this session, we'll examine the EU's competitive imperatives and strategies, with a focus on the markets and the product sectors in its sights and how European companies are positioning to grow their share in what is expected to be an increasingly competitive global playing field.</p> <p>The discussion also will provide an up-to-date assessment and outlook of the broader global market environment for 2016. What will it take for U.S. exporters to thrive and survive in these 'new normal' conditions, characterized by oversupply, growth ambitions and fierce competition?</p>	Lucerne Room II, III
10:15 am–10:30 am	Break	Lucerne Foyer
PRODUCT COMMITTEE MEETINGS		
10:30 am–12:00 pm	<p>Cheese and Consumer Products Committee</p> <p>Global Ingredients Committee <i>See page 5 for agendas</i></p>	Alpine Room I, II Lucerne Room II, III
12:00 pm–1:00 pm	Lunch	Geneva/Currents Room
1:00 pm–1:15 pm	<p>Dairy Market Access Issues of Interest</p> <ul style="list-style-type: none"> • Matt McKnight, senior vice president, market access, regulatory and industry affairs, USDEC <p>What are the most challenging market access barriers of late for U.S. dairy exporters? Which are the most technical and the most troublesome? This session will update members on current efforts to resolve technical barriers and keep members informed of any potentially new developments.</p>	Lucerne Room II, III

TIME	ACTIVITY	LOCATION
GENERAL SESSION (CONTINUED)		
1:15 pm–2:30 pm	<p>The TPP and Global Dairy Trade: U.S. and Canadian Perspectives</p> <p><i>Overview, Update and Economic Analysis</i></p> <ul style="list-style-type: none"> • Shawna Morris, vice president of trade policy, USDEC • John Newton, senior director of economic research, National Milk Producers Federation <p><i>Presentation and Points-of-View Discussion</i></p> <ul style="list-style-type: none"> • Dino Dello Sbarba, president and chief operating officer, Saputo • Jaime Castaneda, senior vice president of trade policy, USDEC • Tom Suber, president, USDEC (<i>moderator</i>) <p>As the largest dairy processor in Canada, Saputo holds a unique vantage point on the newly-finalized Trans-Pacific Partnership (TPP) and what lies ahead for global dairy trade. This session will feature the views of the company’s president relative to the TPP and, in particular, what the trade agreement may mean for its U.S., Australian and Canadian operations.</p>	Lucerne Room II, III
2:30 pm–2:45 pm	Break	Lucerne Foyer
2:45 pm–3:45 pm	<p>Containing a Crisis in a Global World—Are You Ready?</p> <ul style="list-style-type: none"> • Sam Mulligan, director, Data Driven Marketing Asia, Shanghai • Charles Shen, executive vice president, Weber Shandwick Beijing • Margaret Speich, senior vice president, strategic and industry communications, USDEC • John Dardis, senior vice president, U.S. corporate affairs, Glanbia (<i>moderator</i>) <p>Nearly three years after a false alarm in which dairy ingredients were thought to be potentially contaminated with botulism, the Fonterra WPC80 precautionary recall remains a reminder that anything can happen in today’s highly competitive global environment where complex production and distribution channels are intrinsically linked, and rumors spread across continents in milliseconds.</p> <p>To strengthen U.S. dairy’s international crisis preparedness, USDEC established a pilot program to help strengthen crisis capabilities among the largest U.S. suppliers to China, considered as our most sensitive U.S. export market to both real and perceived food safety crises.</p> <p>In this session, we’ll hear results of groundbreaking market research on the messages and communications actions that would matter the most to Chinese consumers in a crisis, as well as the crisis tools and capabilities that U.S. companies need to protect their reputation, image and sales.</p>	Lucerne Room II, III

TIME	ACTIVITY	LOCATION
3:45 pm–4:30 pm	<p>Business Session</p> <p><i>Trans-Pacific Partnership</i></p> <ul style="list-style-type: none"> • Resolution (<i>Action Required</i>) • Tom Suber, USDEC <p><i>2017 Business Plan</i></p> <ul style="list-style-type: none"> • Assumptions and Projected Revenue (<i>Action Required</i>) • Tom Suber, USDEC <p><i>2015 Audit Report (Action Required)</i></p> <ul style="list-style-type: none"> • Carolyn Gibbs, DMI 	Lucerne Room II, III
4:30 pm	Adjournment	Lucerne Room II, III
5:30 pm–7:00 pm	Reception	Edelweiss (43rd Floor)

FRIDAY, APRIL 8, 2016

TIME	ACTIVITY	LOCATION										
7:30 am–12:00 pm	<p>Member Consultations with USDEC Representatives from Middle East, China, Japan and Southeast Asia</p> <table border="1"> <thead> <tr> <th>REPRESENTATIVE</th> <th>LOCATION</th> </tr> </thead> <tbody> <tr> <td>Nina Bakht Halal, USDEC Middle East</td> <td>Grindelwald</td> </tr> <tr> <td>Daniel Chan, USDEC China</td> <td>Verbier</td> </tr> <tr> <td>Jeff McNeill, USDEC Japan</td> <td>Zermatt</td> </tr> <tr> <td>Dali Ghazalay, USDEC Southeast Asia</td> <td>Gstaad</td> </tr> </tbody> </table> <p>To schedule consultations, contact John Klees at jklees@usdec.org.</p>	REPRESENTATIVE	LOCATION	Nina Bakht Halal, USDEC Middle East	Grindelwald	Daniel Chan, USDEC China	Verbier	Jeff McNeill, USDEC Japan	Zermatt	Dali Ghazalay, USDEC Southeast Asia	Gstaad	
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7:30 am–12:00 pm	<p>Personal Consultations on Crisis Preparedness</p> <p>USDEC members have an opportunity to sign up for personal consultations with Weber Shandwick Beijing. The consultations will be offered at the Swissôtel from 7:30 am to 12:00 pm.</p> <p>For more information and to schedule consultations, contact Margaret Speich at mspeich@usdec.org.</p>	Alpine Room I										

GLOBAL INGREDIENTS

Location: Lucerne Room II, III

Gabriel Sevilla, Chair
Hoyt Huffman, Vice Chair

Vikki Nicholson and Kristi Saitama, staff liaisons

10:30 am **Antitrust Advisory and Opening Comments by Chair**

10:35 am **Panel Discussion: Situation and Outlook for U.S. Dairy Exports from a USDEC Office Perspective**

- Moderator: Terri Rexroat, vice president, U.S. trade services
- Nina Bakht Halal (MENA), Daniel Chan (China), Dali Ghazalay (SE Asia), Jeff McNeill (Japan)

11:15 am **Chinese Consumer Insights**

- Sam Mulligan, director, Data Driven Marketing Asia

11:50 am **2017-19 Marketing Business Plan Development**

- Kristi Saitama, vice president, export ingredient marketing

12:00 pm **Meeting Adjourned**

CHEESE AND CONSUMER PRODUCTS

Location: Alpine Room I, II

Mark Wustenberg, Chair
Bob Ekstrom, Vice Chair

Vikki Nicholson and Angélique Hollister, staff liaisons

10:30 am **Antitrust Advisory and Opening Comments by Chair**

10:35 am **Consortium for Common Food Names**

- Shawna Morris, vice president, trade policy

10:40 am **Chinese Consumer Insights**

- Sam Mulligan, director, Data Driven Marketing Asia

11:10 am **2017-19 Marketing Business Plan Development**

- Angélique Hollister, vice president, cheese and consumer product marketing

11:20 am **Panel Discussion: Situation and Outlook for U.S. Dairy Exports from a USDEC Office Perspective**

- Moderator: Terri Rexroat, vice president, U.S. trade services
- Nina Bakht Halal (MENA), Daniel Chan (China), Dali Ghazalay (SE Asia), Jeff McNeill (Japan)

12:00 pm **Meeting Adjourned**

USDEC Board of Directors Meeting SPEAKER PROFILES

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DAVID AHLEM
Chief Executive Officer and President, Hilmar Cheese

David Ahlem is the chief executive officer and president for Hilmar Cheese Company. Prior to working for Hilmar Cheese Company, he was a business manager for Cargill Animal Nutrition. Ahlem is a member of the board of directors for the Innovation Center for U.S. Dairy, the Dairy Institute of California, the National Cheese Institute, and is a member of California Department of Food and Agriculture's Dairy Advisory Committee and several other industry-related groups.



MARC BECK
Executive Vice President, Strategy and Insights, U.S. Dairy Export Council (USDEC)

Marc Beck joined USDEC in 1997 to head up the organization's market development efforts, with the responsibility of further developing and communicating USDEC's marketing and promotional campaigns worldwide. He also has led efforts to develop the organization's strategic direction. He has an extensive background in international business development, including various executive positions on five continents devising new market entry strategies and transactional experiences in sales and marketing of food products and agricultural commodities.



JAIME CASTANEDA
Senior Vice President, Trade Policy, USDEC

For the past 17 years, Jaime Castaneda has been the leading voice for both the National Milk Producers Federation (NMPF) and USDEC on all trade agreement negotiations. Previously he served as a private sector advisor to USTR Ambassador Michael Froman and USDA Secretary Tom Vilsack, and regularly provides guidance to the administration on trade policy issues.



JOHN DARDIS
Senior Vice President, U.S. Corporate Affairs, Glanbia

Dr. John Dardis is senior vice president for U.S. corporate affairs with Glanbia. Dardis oversees Glanbia's media relations, government affairs, reputation and issues management working with a diverse range of businesses that are part of Glanbia's growing footprint in the United States, including cheese, whey, ingredients, customized solutions and sports nutrition operations. Dardis previously served as Ireland's First Secretary for Agriculture, Food and the Marine at the Irish Embassy in Washington, D.C., where he managed Irish agri-food trade interests with the United States.



TOM GALLAGHER
Chief Executive Officer, Dairy Management Inc.

Tom Gallagher is the chief executive officer for Dairy Management Inc. (DMI), which manages the national dairy farmer checkoff program. In this role, Gallagher directs DMI's strategic programming, including partnerships, nutrition, product and consumer research, health and wellness, and consumer confidence. Dairy checkoff programming also includes USDEC and its export and ingredient marketing program. Gallagher serves as secretary-treasurer of USDEC.



JON M. HUNTSMAN JR.
Former Ambassador to China and former Utah Governor

Governor Jon M. Huntsman Jr. began his career in public service as a staff assistant to President Ronald Reagan. He has since served four U.S. presidents in critical roles around the world including ambassador to Singapore, deputy assistant secretary of commerce for Asia, U.S. trade ambassador and most recently U.S. ambassador to China. Huntsman was also a candidate for the 2012 Republican presidential nomination.



CHRISTOPHE LAFOUGÈRE
Director, GIRA Consultancy and Research

Christophe Lafougère is director of the food and drink market consultancy and research firm, GIRA. Since joining GIRA more than 20 years ago, Lafougère has led many strategic consultancy, due diligence and research assignments throughout the food and drink chain. As director, Lafougère supervises all consulting and research activities in the dairy sector, covering all aspects of production, collection, processing and marketing in all major dairy producing and consuming regions of the world. Lafougère also has initiated and directed the annual GIRA Dairy Club, whose members include many of the world's top dairies.



MATT MCKNIGHT

Senior Vice President, Market Access, Regulatory and Industry Affairs, USDEC

Matt McKnight leads market access and regulatory affairs efforts at USDEC, where he has worked for more than 10 years. He has nearly 20 years of experience in dairy-related industries, including positions at Cargill, Land O'Lakes and Archer Daniels Midland.



SHAWNA MORRIS

Vice President, Trade Policy, USDEC

As vice president of trade policy, Shawna Morris works to achieve results for USDEC members on matters related to international trade and government policies. Morris has served in the past as a private sector advisor to the U.S. Trade Representative and the U.S. Department of Agriculture Technical Advisory Committee. Prior to joining the dairy industry, she worked in the field of economic and financial analysis.



SAM MULLIGAN

Director, Data Driven Marketing Asia, Shanghai

Sam Mulligan founded DDMA China Market Research in 2002, a company that specializes in consumer and trade market research, primarily for food and beverage companies in China and Asia. Prior to establishing DDMA, Mulligan was a director at the research group that became Synovate and a managing partner at Euro RSCG. Mulligan has lived and worked in Asia since 1994.



JOHN NEWTON

Senior Director, Economic Research, National Milk Producers Federation

Dr. John Newton is the senior director of economic research for NMPF. Newton coordinates economic analyses in areas of big data analysis, domestic and international dairy and grain market risk assessment, federal dairy pricing and safety net programs, and trade analysis. Newton has published numerous peer-reviewed academic articles in leading trade publications, and has been the lead researcher on over \$1 million of USDA grants.



PAUL ROVEY
Chairman, USDEC

Paul Rovey serves as chairman of USDEC, a post to which he was elected in October 2012. Rovey also serves as chairman of DMI, the primary funder of USDEC. He owns a dairy farm in Glendale, Arizona, where he milks approximately 2,100 cows, and is president of United Dairymen of Arizona. In addition to his efforts in dairy promotion, Rovey also serves as a leader within Arizona's agriculture community.



DINO DELLO SBARBA
President, Chief Operating Officer, Saputo Inc.

After joining Saputo in 1990 as national director of retail sales and marketing, Dino Dello Sbarba became president and chief operating officer of Saputo's Canadian cheese division in July 2001. In January 2004, Sbarba took over responsibilities of president and chief operating officer of Saputo's U.S. cheese division and in 2007 was named president and chief operating officer of the company's Canadian dairy product division. Since April 2012, Sbarba has served as chief operating officer of Saputo Inc. He obtained his bachelor's degree in commerce, management and marketing from Concordia University in 1978.



CHARLES SHEN
Executive Vice President, Corporate and Public Affairs, Weber Shandwick Beijing

Charles Shen re-joined Weber Shandwick in 2012 to manage its China corporate and public affairs practice and then became general manager of the agency's Beijing office. Shen previously worked at Microsoft, where he was the senior director of corporate communications, responsible for Microsoft's corporate reputation and branding in China. This included crisis management, public relations, branding and internal/executive communications.



MARGARET SPEICH
Senior Vice President, Strategic & Industry Communications, USDEC

Margaret Speich leads industry relations, membership renewal and recruitment, as well as issues management and crisis preparedness programs for USDEC. She also serves as the executive editor of *The U.S. Dairy Exporter*, a blog that provides market analysis, research and news about U.S. dairy trade. Previously, Speich directed communications programs on behalf of the Council for Biotechnology Information, a global public relations effort funded by U.S. plant biotechnology companies to build awareness and understanding of biotech crops around the world.



TOM SUBER
President, USDEC

Tom Suber started in the dairy industry in 1990 when he set up the National Dairy Board's export program. He was later hired to run USDEC when DMI created it in 1995. As president, Suber directs programs to build global markets for U.S. ingredients and dairy product exports.