

SUMMIT DAILY **MONDAY**

STOP PRESS

Please note

Please be aware that session start times vary so pay attention to the announcements of sessions' starting.



Win a free trip to WDS 2011 in Parma, Italy

Visit the Italian WDS 2011 booth for a chance to win a complimentary free registration for you and your companion. Winner announced on WDS2011.com website, Friday 12th November.



Tomorrow's Technical Tours

Technical Tour One

If you are attending Technical Tour 1

- The Coach will leave at 6.45am from Federal Street (directly opposite the entrance to the SKYCITY Grand Hotel)
- Clean, flat, covered-in footwear is required to be worn at all times. Socks will be required when changing into site safety footwear.
- No smoking will be permitted on manufacturing sites
- No photographs will be permitted inside manufacturing sites
- Delegates are reminded they are to wear no jewellery on the Plants tours. We recommend you leave your jewellery back at the Hotel.

Social Tours

Please meet at the registration desk 15mins prior to the start of your tour, on Level 3 of the Sky City Convention Centre (same level as the registration desk, entry from Federal Street).

PLEASE NOTE

Delegates are required to show their name badges on all Tours.

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Improvement
Corporation

Food
New Zealand



IDF HOT TOPICS

A look at the World Dairy Situation

IDF met with Adriaan Krijger, editor of the *IDF World Dairy Situation* to gather his views on this key publication for the dairy sector

IDF – “Can you tell us the current state of the dairy market?”

Adriaan Krijger – “The current state of the dairy market is good. Demand is firm and milk production development is moderate. As a consequence prices are OK. Here in New Zealand record producer prices are being paid. But.... higher milk prices will encourage milk production and the cycle will start again...”

IDF – “Could you share with us key conclusions of this report?”

Adriaan Krijger – “The key conclusion of the report is that after a very depressing first half in 2009, the situation changed surprisingly during the second half. It has much to do with the Chinese demand for WMP. That was the key driver for rising dairy commodity prices and the recovery of the world dairy market.”

IDF – “2010 has been a balanced year with a steady demand and a moderate production development. How encouraging is it for the coming years?”

Adriaan Krijger – “As mentioned before, volatility is here to stay. So, yes, it is encouraging that the dairy sector, after the roller coaster of 2007-2009, recovered again. But we have to take into account that, due to more market and less government, we should prepare for the next roller coaster. It may be not so fierce as the last one, but certainly more intense than we are used to.”

IDF – “What is the importance of the dairy sector and milk in general for both industrialised and developing nations?”

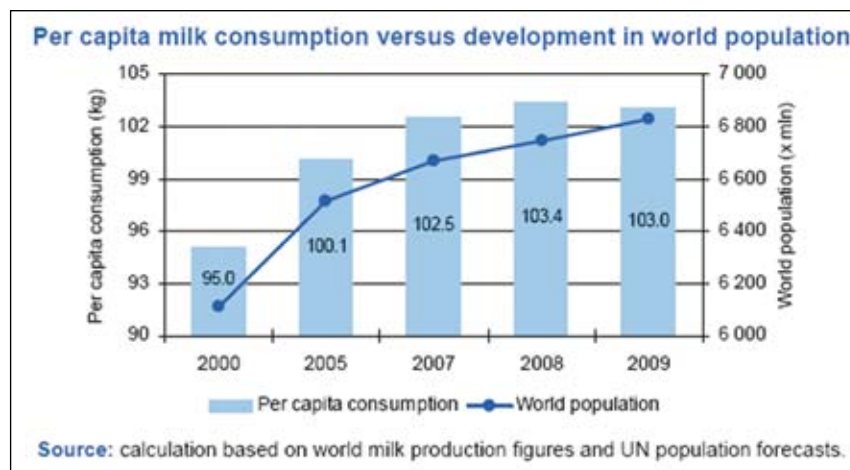
Adriaan Krijger – “First of all milk is an important and nutritious food to feed the world. With an ever-growing world population there are more mouths to feed. Moreover dairy produce is an accepted and popular food. It fits very well both the diet in upcoming countries as well as the modern consumer in the Western world. Secondly, it is an important employer: milk is being produced, processed and distributed and gives meaning to life to hundreds of thousands of people almost everywhere in the world. Finally our industry plays a important role in supporting nature.”

IDF – “What are the major challenges facing the dairy sector and how can the dairy sector evolve and adapt to this changing world?”

Adriaan Krijger – “The big challenge is to balance between producing milk to feed people and environmental responsibility. For the sake of continuity our sector needs to strike the right balance between the two. But I am convinced, given the initiatives taken, that we will manage. Other challenges are: consumer health concerns and changing dietary patterns worldwide.”

IDF – “Could you explain why this IDF Bulletin is key for the dairy sector?”

Adriaan Krijger – “The (dairy) world moves fast. Everybody involved in our sector needs to know how the world will develop. Therefore you need a reliable source of information. The



WDS offers this source – an upgraded version of IDF flagship publication, the *IDF World Dairy Situation*.”

“*The IDF World Dairy Situation 2010* contains several changes, all designed to make it more usable and relevant to decision-makers and dairy sector actors concerned by the continuously changing global dairy market conditions. It is also easier to use and reference thanks to its new innovative layout.”

“This updated edition is the result of close collaboration between top experts and key organisations throughout the globe and the IDF. Its contents, including statistics on production, consumption and trade in all regions of the world, as well as specific observations from IDF member countries, will help the reader to better understand and deal with the many challenges and opportunities facing the global dairy market, many of them driven by population and income growth, consumer health concerns and changing dietary patterns worldwide.”

“Experts have again been offered a platform to contribute to current topical discussions. This year the selected subjects are: informal dairy economies and their dynamics; global view of milk production costs; volatility on both sides of the Atlantic Ocean; and four initiatives undertaken in the field of futures.”



Chile joins the International Dairy Federation

At the 97th General Assembly held in Auckland, New Zealand, on 7 November 2010, the International Dairy Federation (IDF) welcomed Chile as a new member, bringing IDF's global representation up to 57 countries and increasing IDF's presence even further.

The President of the Chilean National Committee is Mr. José Antonio Galilea Vidaurre, Minister of Agriculture, and the Secretary, Sebastian Ganderats Fuentes.

Chile is a major dairy country which was very active in IDF many years ago. IDF re-initiated contacts with Chile last year on the occasion of the 3rd International Seminar for the dairy sector "Chilelacteo 2009". At this event, Christian Robert, taking advantage of an invitation from Fedeleche in Chile, delivered a presentation about IDF and participated in several meetings in Valdivia with representatives of the Industry, of Dairy Associations and of the Government. This visit was also an opportunity for a meeting at the Ministry of Agriculture, related to the activities of the IDF and potential benefits for the Chilean dairy sector.

Sustainability in Full Force at the World Dairy Summit

Do not miss...

Global Dairy Agenda for Action Update

On Tuesday, 9 November, presentations will be delivered from the Global Dairy Agenda for Action (GDAAC) signatories and two New Zealand dairy farmers. A variety of global case studies will be highlighted and the session will also cover what the industry is seeking to achieve leading up to the official GDAAC reporting year of 2011. The event will be held from 9:30-11:30 a.m. in Marlborough Room 2.

Sustainability Area

For the week of the conference, there will be an area in the Auckland Promenade showcasing the dairy industry's sustainability worldwide progress. Demonstrations of the Green Paper will be onsite, containing nearly 350 examples of initiatives across the entire dairy chain and continues to grow.

Join us and learn more about this initiative!

Visit the new IDF website at www.IDF-LCA-guide.org and discover how our industry is committed to producing safe and nutritious foodstuffs sustainably



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Focus on....

Summit Daily brings you the views of a small sample speakers in today's IDF SWIFT session.

Cary Fry, speaking in the IDF SWIFT session Monday at 11.15

Cary Frye is vice president, regulatory affairs for the International Dairy Foods Association, a U.S.-based trade association and oversees scientific and regulatory activities regarding product safety, food labeling, standards, and nutrition and health. She is active in the International Dairy Federation's food standards and serves as vice chair for US-IDF and IDF Standing Committee on Food Labeling and delegate to Codex Committee on Food Labelling.



Responding to Summit Daily's questions, Cary wrote: The global dairy industry is facing pressure worldwide related to governments' taking a more active role in nutrition policy. In light of growing numbers of children and adults who are obese or have health risks more focus is being placed on avoiding fat, saturated fat, sodium and added sugars. This is resulting in some countries taxing foods high in saturated fat like butter or cheese, or banning advertising on foods that are high in sodium such as cheese or discouraging consumption of sweetened dairy products such as yogurt, flavoured milk or ice cream. New national legislation is requiring changes in nutrition labelling of packaged foods to highlight nutrients that promote disease with little emphasis on required nutrients for good health. The global dairy industry is working diligently to position dairy products as nutrient rich foods that provide essential vitamins and minerals such as calcium, potassium and protein that are critical to good health.

The industry must continue work to inform and educate scientists and world leaders on the health and nutrition benefits of consuming dairy products. Opportunities exist for continued research in the areas of the fatty acid profile to understand the role saturated fats in dairy products on health as well as the health benefits of other nutrients in dairy products.

In the United States my role is to assist dairy processors in compliance with national and global regulations for labelling dairy products and advocate for government policies that promote the consumption of nutrient-rich dairy products. The continued work of IDF in the areas of nutrition and health and labelling will be critical to coordinate information world-wide on potential threats to dairy product consumption and coordinate dissemination on new scientific information on the health and nutrition benefits of dairy. My role within IDF is to share information from activities in the U.S. with others around the world and to be actively involved in Codex activities that impact nutrition policy and food labelling.

In my area of expertise on labelling regulations and standards for dairy products, I envision efficiency in this area is when regulations do not require the industry to unnecessarily change packaged dairy product labels. Successful work in this area should facilitate trade of dairy products with standards that are necessary to define the nature of the dairy product for the industry and consumer, but still allow for innovation of new processing techniques or ingredients needed for new product development.

Dr. Jeremy Hill

Jeremy is Chairman of International Dairy Federation in NZ and currently Fonterra's chief technology officer, having previously held a number of senior R&D leadership roles including general manager of research and development at the Livestock Improvement Corporation, deputy chief executive of the New Zealand Dairy Research Institute and general manager of the Fonterra Research Centre. Jeremy is a director on a number of boards including the IDF and Global Dairy Platform.



In response to Summit Daily's questions, Jeremy submitted the following:

"Hot topics, where IDF activities are focused in the scientific and technically related area include the promotion and enhancement of the nutrient density/richness credentials of dairy and establishing a fair and balanced view of milk fat based on sound science rather than opinion and doctrine. Sustainability is also a huge topic, but here we need to look at sustainability in the broader context of food security, sustainable nutrition, sustainable industry development and employment and of course a sustainable environmental. We must also not forget that diets need to be sustainable from a cost, sensory, enjoyment and satisfaction perspective. Dairy has a lot to offer if we look at all aspects of sustainability. Another hot topic is food assurance and safety. The development of methods and systems to guarantee the authenticity and safety of milk and dairy products throughout the supply chain will be critical to the development of the dairy sector."

"For me this is really about putting dairy back into the 'centre of the table' in countries that have traditionally consumed dairy, and building the profile of dairy as a wonderful source of nutrition – the gold standard if you want, in countries and regions where dairy has not been a staple in the past. World population growth and demand for superior nutrition bodes well for dairy, but addressing the issues mentioned previously will be an important determinant of the future success of the sector."

"Addressing some of dairy's most significant issues will require sector-wide collaboration and strong scientific and technical leadership. I am committed to do my part to help focus the dairy sector on the priority issues, fostering collaboration and creating consensus around the arguments we can use to defend and grow dairy nutrition."

"To become more efficient we need not only more common standards but also the methods used to verify compliance with those standards. Regulations need to protect consumers from false claims, and ensure food safety, but not be so restrictive that they stifle innovation and our ability to delivery the natural goodness of dairy in new formats and to new markets. The development of cost effective ways to meet regulations underpinned by robust science will have a key role in improving the efficiency of the supply chain."

Summit Daily brings you more about a very small sample of tomorrow's speakers by conducting mini, email interviews.



Dr. Torsten Hemme

Natural Inspiration session on Tuesday 9, at 10.30.

Torsten grew up on a dairy farm in Northern Germany which has been in the family for more than 400 years. After working as dairy farmer for 2 years he studied agricultural economics at University Göttingen/Texas A&M University.



In his PhD research 1995-1999 he developed the software TIPI-CAL and the idea of the IFCN research network. He is Chairman of the IFCN in which researchers from more than 80 countries and 70 companies are participating.

When asked "What is the 'primary message' in your paper?" Torsten replied:

"There is twice as much trade within countries, from milk surplus to milk deficit regions, within the EU, US and China than on the world market."

"The key driver for developments in global milk production in the future will depend on the milk price, the feed price and the related milk:feed price ratio. Once this ratio is on a level, as it was in NZ in the past, milk production growth will be generated by grazing or low yield farming systems in developing countries. Once the milk:feed price ratio becomes favourable (like f.e. in the USA 2000-2007) we will see growth of milk production where:

- feed is cheap,
- you get the permission to build feed lot dairies of 2000 cows or more and
- have the ability to manage these units."

"Waterfootprint will be one new hot issue for the global dairy industry in the future. After having fully understood and benchmarked carbon footprints, dairy farming systems will be classified by how much water and what type of water they use."

"Since the year 2000 the IFCN network has been globally analysing the competitiveness of milk production to help dairy regions to know where there are. In the future, we will help dairy regions and their stakeholders search for future-fitting dairy farming systems. Of course, this has to meet economic criteria such as cost competitiveness and at the same time meet the various other criteria to be sustainable."

Mariann Fischer Boel

Natural Inspiration Session, Tuesday 9 at 13.30.

Mariann Fischer Boel served as a Member of the Danish Parliament from 1990-2004 and was Minister for food, agriculture and fisheries from 2001-2004. From 2004-2010 she was European Commissioner for Agriculture and rural development and carried out important reforms of the Common Agricultural Policy. She now lives in Denmark where she serves on the Boards of several organisations.

"The primary message in my paper? The European Model of Agriculture is able, through its multifunctional approach, to address new challenges and turn them into opportunities for European farmers, provided the reform path towards more market orientation and the delivery of public goods via agriculture continues."



"In order to shape the future of the dairy sector efficiently, the CAP has: 1. to consider the competitive capacity of producers and processors of milk, 2. to enhance transparency in the dairy supply chain and 3. to move towards even more market orientation i.e. without quotas but not without a safety net.

"Currently, and also in five years, the biggest challenge for the global dairy industry will be coping with the volatility of prices in a more and more globalised market, without falling back into protectionism or using trade distorting measures.

Ken Ash

Natural Inspiration Session, November 9 at 16.00.

Prior to becoming OECD Director of Trade and Agriculture in December 2008, Ken had served as Deputy Director since 1999. He played a leading role in the merger of the former Trade and Agriculture directorates in 2006, serving to reinvigorate the key policy contributions of the OECD in the areas of trade, agriculture and fisheries.



Summit Daily – "In one sentence, what is the primary message in your paper?"

Ken Ash – "Further reform of farm policies in OECD countries would greatly benefit producers and consumers..."

Summit Daily – "Where do you see the global economic and policy outlook for agriculture, say 10 years ahead?"

Ken Ash – "I see a healthy sector, growing particularly strong in less developed countries and I also see more reliance on markets and trade."

Summit Daily – "In your opinion, what are the 'hot topics' for the global dairy industry now, in five years?"

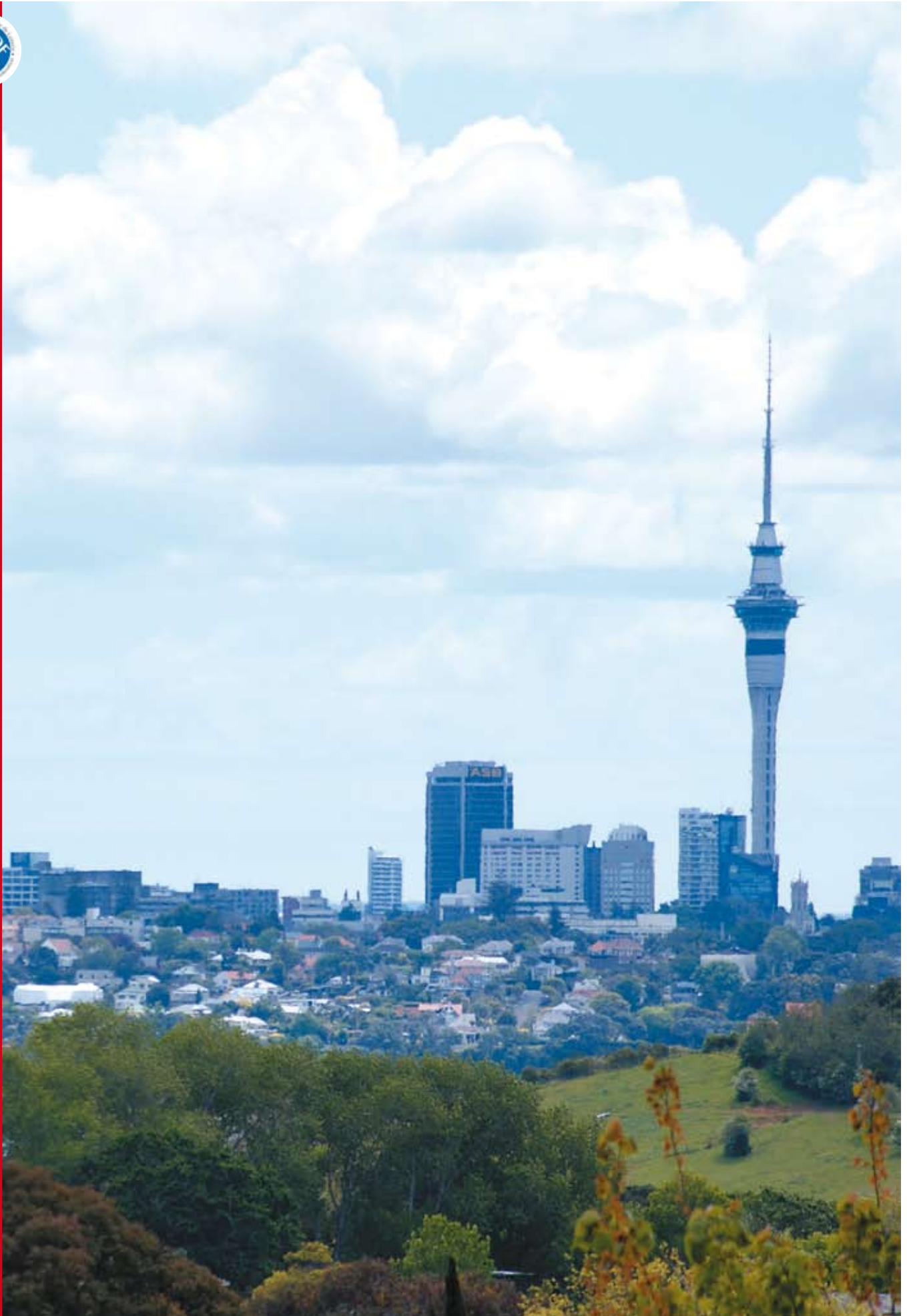
Ken Ash – "Global food security, resource scarcities, climate change, market uncertainties.

Summit Daily – "How will your role/work impact on this future.

Ken Ash – "My work will provide evidence-bases for further improvements in policy performance – domestically and internationally.



SCENE AROUND



Auckland's central business district, looking west from the suburb of Kohimarama, Sky City, venue for IDF WDS 2010, on right

The NZIFST *Taste of New Zealand* showcase event last evening had much to interest the large group who made the time to attend



SCENE AROUND



Zespri's Jayne Chamberlain talks with Bernardo Macaya Trejos and Sergio Estrada from Cooperativa de Productores de Leche dos Pinos, Costa Rica



Jackie Kirkham and Dongxiao Sun-Waterhouse of Plant & Food Research on their stand



Jenny, Tim and Phil Grainger, owners of Venerdi, "Using innovation to create allergen free baked goods"



Representing the Riddet Institute, General Manager, Mark Ward, right, and Amit Taneja

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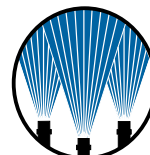
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Manufacturers of milk and other food ingredient powders recognise the constant need to operate their processes more efficiently. The goal is to increase throughput while simultaneously reducing costs in order to be competitive globally. Many manufacturers are also shifting more production towards higher value specialty products that require higher quality standards. In order to produce these different products, plant operations must perform

within narrower, more consistent, product specifications.

In the dairy industry, a variety of dryers and evaporators are common in the production of powdered products to achieve cost-effective moisture removal from concentrated liquids. Dryers and evaporators are the most energy intensive units used in the dairy processing industries. Optimal operation of this process is essential to reduce costs and help meet final product quality specifications.

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Rockwell Software Solutions for the Dairy industry at www.rockwellautomation.com/rockwellsoftware/cpg

Booth 26

Rockwell Software recognises these challenges and offers an application focused on delivering valuable dryer and evaporator balance control for optimisation and performance. These Model Predictive Control (MPC) and Optimisation applications assist in controlling and optimising the drying process during the production of powdered dairy products. Powered by Pavilion8® patented technology, this application is tailored to the individual configuration of each unit and specific site objectives. It combines Rockwell Software's Dryer and Evaporator Balance Control applications for a complete solution which incorporates full thermal control and optimisation.

The application works with single and multi-stage spray drying processes as well as flash dryers and processes with fluidised beds. It controls product average moisture to a desired target, while reducing overall moisture variability, and manages relative humidity and capacity to achieve optimal performance.

Real-time visualisation in a browser-based interface presents metrics that allow operators and management to monitor the performance of production, quality and energy. These dashboards provide predicted plant performances to be viewed and managed to realise and sustain the lifetime business value of MPC investment.

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Palletising system developed and constructed for an Australian dairy manufacturer which utilised ABB 660 industrial robots

Haden and Custance Ltd

– materials handling and automation specialists

Haden and Custance Ltd specialise in the design, manufacture and automation of material handling systems and supply a wide range of industries, including food and beverage, dairy, meat, building, paint and paper-board. From a base in Havelock North, Hawkes Bay, New Zealand, custom-built systems and products are shipped within New Zealand, to Australia, UK, Europe and the USA.

Haden and Custance actively pursue export opportunities to the extent that 90% of their sales are now outside New Zealand. A few of their clients include Heinz Wattle's, Goodman Fielder, Dulux, DB Breweries, Fonterra (NZ and Australia), Bega Cheese, Murray Goulburn, Dairy Crest, Lactalis, Great Lakes Cheese, Amcor/Kiwi Packaging, Charta Packaging, Visy, Carter Holt, and SCA Hygiene Australasia.

In New Zealand, Haden and Custance represent NDC for Automated Guided Vehicles (AGV's) and have recently completed installations – one of which incorporated two AGV's – at Fonterra Edendale. Fonterra has embraced the technology and have now introduced these vehicles on six of their sites in New Zealand.

Haden and Custance is also a Strategic Partner to ABB Robotics and offers sales, service and programming capabilities for new and existing ABB robot systems.

A recent Haden and Custance project was the development and construction of a palletising system for an Australian dairy manufacturer which utilised ABB 660 industrial robots (pictured). Four-axis robots utilising a mechanical/tine pickup head with a payload capacity of 180kg were installed. Each head was designed to handle 20 different products that ranged in weight from 3kg to 12kg and palletised product at a rate of up to 20 cartons per minute. This project also included two NDC Auto Guided Vehicle's.

To ensure minimal time is lost during equipment installation and commissioning, all projects are fully assembled and commissioned at Haden and Custance Ltd's factory floor prior to shipping.

Upon customer approval after acceptance testing at their Havelock North factory, the equipment is disassembled, packed and shipped to the customer's site where it is reassembled and fully re-commissioned to the customer's satisfaction.

Technical Tour 1



Both Technical Tour 1 and Technical Tour 2 will visit several sites of interest in the Waikato tomorrow and Thursday. Today we are highlighting Livestock Improvement Corporation and will feature more about other Waikato sites in Tuesday's Summit Daily.

Integrated herd improvement

Livestock Improvement Corporation (LIC) is one of the largest integrated herd improvement organisations in the world. A dairy farmer owned co-operative, LIC has been providing services to farmers since 1909, when a routine Herd Testing Service was instituted by New Zealand farmers, supervised by the Department of Agriculture.

LIC has been a user-owned co-operative since March 2002. Its services range from herd testing and milk analysis, to artificial breeding, animal health, farm advisory, herd recording, DNA analysis, farm automation and farm mapping systems.

Research

LIC's Strategy and Growth Group (S&G) consists of a team of scientists who are extensively published in the application of genetics, genomics and reproductive technologies.

The Reproduction research group has a long history of technical innovation dating back to the inception of artificial breeding (AB) more than 50 years ago. This group has the challenge of continuing the research achievements of Dr. Patrick Shannon and colleagues, who on the back of the successful frozen semen implementation in the 1950s, delivered liquid semen technology to the New Zealand dairy industry in 1988. Liquid semen has been a powerful innovation for the New Zealand dairy

industry as it allowed many more doses of semen to be produced from elite sires, which ensured the best genetic merit sires were used more widely. The value of the resulting genetic gain, in combination with the development of BW (breeding worth), means the New Zealand dairy industry achieves one of the highest rates of genetic gain in the world. The team is focused on further enhancements of the semen diluent and evaluation of semen sexing technologies for use in artificial breeding.

The biotechnology research group is focused on developing and delivering advanced genomic solutions to enhance animal selection decisions in LIC's animal breeding schemes, and to enable differential selection of pastoral livestock species through services offered by LIC's diagnostics business, GeneMark. The team has operated at the forefront of genomics technology, culminating in the delivery to dairy farmers of LIC's DNA Proven bull team in 2008.

This innovative new product, driven by genomic selection technology, is set to deliver greater levels of genetic gain to the dairy industry, as future generations of genomically selected sires are used extensively throughout the industry. New Zealand dairy farmers have quickly embraced genomics technology with uptake of this technology. The future goals for the biotechnology group include enhancing the genomic selection tools and developing the potential of the new generation of genomic technologies that will continue to improve the business of animal breeding.

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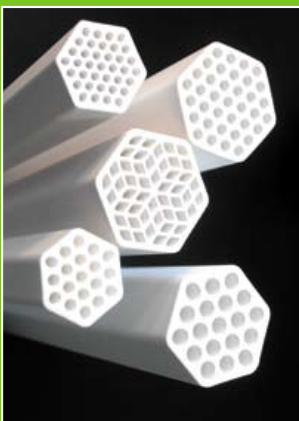
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