Export Update: View from North America

This webinar will begin shortly

AHDB

AHDB Exports Webinar July 2020

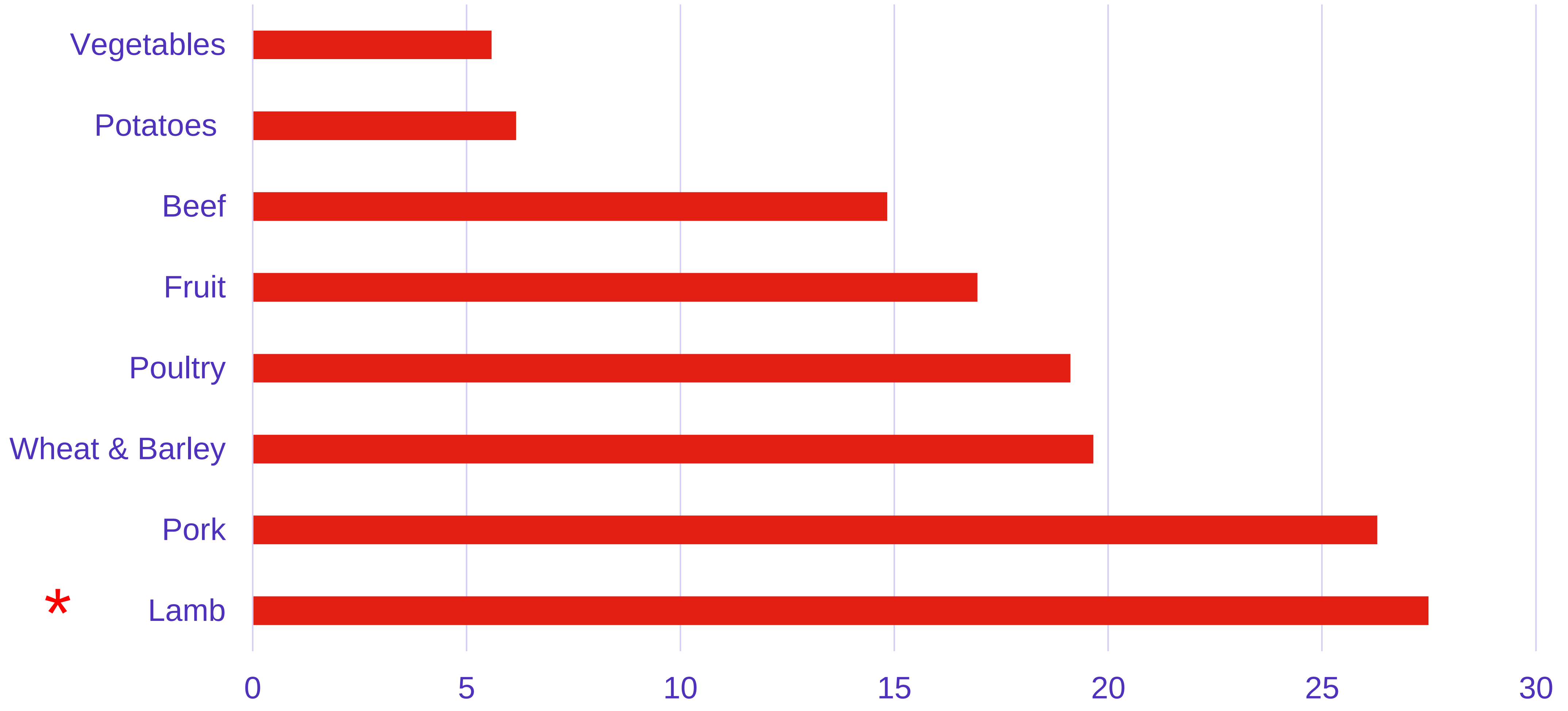
Dr Phil Hadley
International Director

AHDB

Overview

- Introduction and overview of AHDB export activities
- Dana Dickerson, Head of F+D NA, Dept International Trade, Canada
- Susana Morris, Senior Export Manager Americas, AHDB
- Questions and ends at 4.15pm
- Submit questions via the questions tool on your control panel, session after presentations
- Webinar is recorded and will be available after on the AHDB website and youtube channel

Exports as % of domestic production



*Lamb exports between 28% and 33% of production and can rise to 40% seasonally

Source: Defra/HMRC

What we do

- Technical market access, import risk assessment questionnaires, support towards approval, inward inspection, ongoing market maintenance- working in partnership with industry, UK Gov and UKECP
- Outward missions to new/growing markets
- Trade shows to build reputation/presence and provide a platform for exchange with buyers
- In-market presence, activity and intelligence gathering, principally China (CBBC)/HK/US and currently expanding to Japan and Middle East on market development/reputation plus additions in China/US- reflecting opportunities
- Collaborate/support from local Embassy/FCO/DIT network eg Beijing post
- Brussels office on EU policy and impact evaluation

AHDB Export- team outline

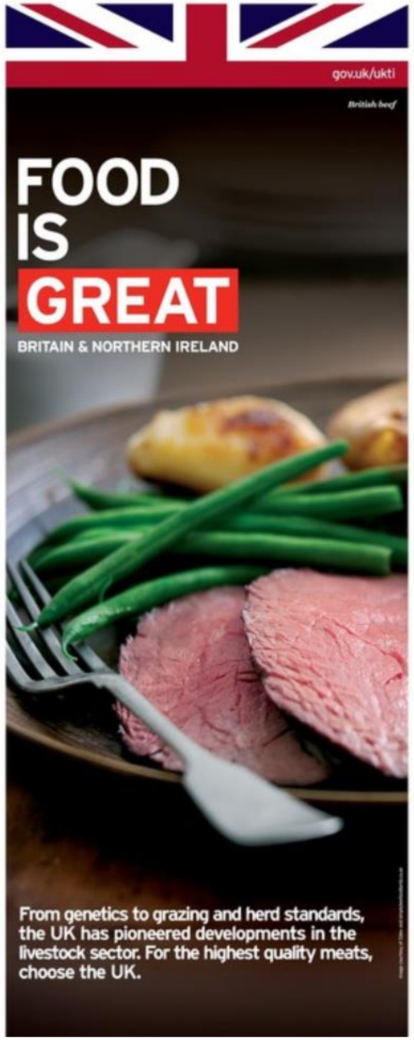
Americas- Susana Morris
EU/MENA- Remi Fourier
Asia Pacific- Jonathan Eckley

Access

- Recent successes in Japan (beef/lamb), Taiwan (pork), China (pork & beef) and US (Beef)
- Ongoing access dialogues with Mexico (pork), Taiwan (lamb), China (lamb), and Vietnam (pork)- travel restrictions continue to hamper inward approval visits
- Current access to Canada with access to US for pork, beef nearing final stage
- A number of certificates are now available electronically via APHA (see: www.gov.uk/export-health-certificates

GREAT- working with Gov

EXPORTING
IS
GREAT
BRITAIN & NORTHERN IRELAND



Market insight

Prompted associations with British food

AHDB

34%
Good quality food

29%
Food safety

29%
Tradition and heritage

27%
Countryside and farming

37 % would pay a premium for British Food

61% China / 65% India

21% France / Germany 24%

Source: AHDB/Red Tractor – ICM International Consumer Perceptions Research August 2017

Q5 – Now thinking specifically about food products from Britain. Which, if any, of the following words or phrases do you associate with British food? (Please select all that apply).

Looking forward

- Exports continues to remain critical to stakeholders and a core part of the AHDB function
- We are developing our approach to include more support in newly granted markets and those with key growth opportunities
- This will increase the ability to deliver on the ground development and reputation building activities with partners
- We will also further improve our consumer insight work in key international markets so we can understand and exploit the potential
- Brexit- EU market remains vital and 3rd C's offer further opportunities

BUSINESS IS GREAT

BRITAIN & NORTHERN IRELAND

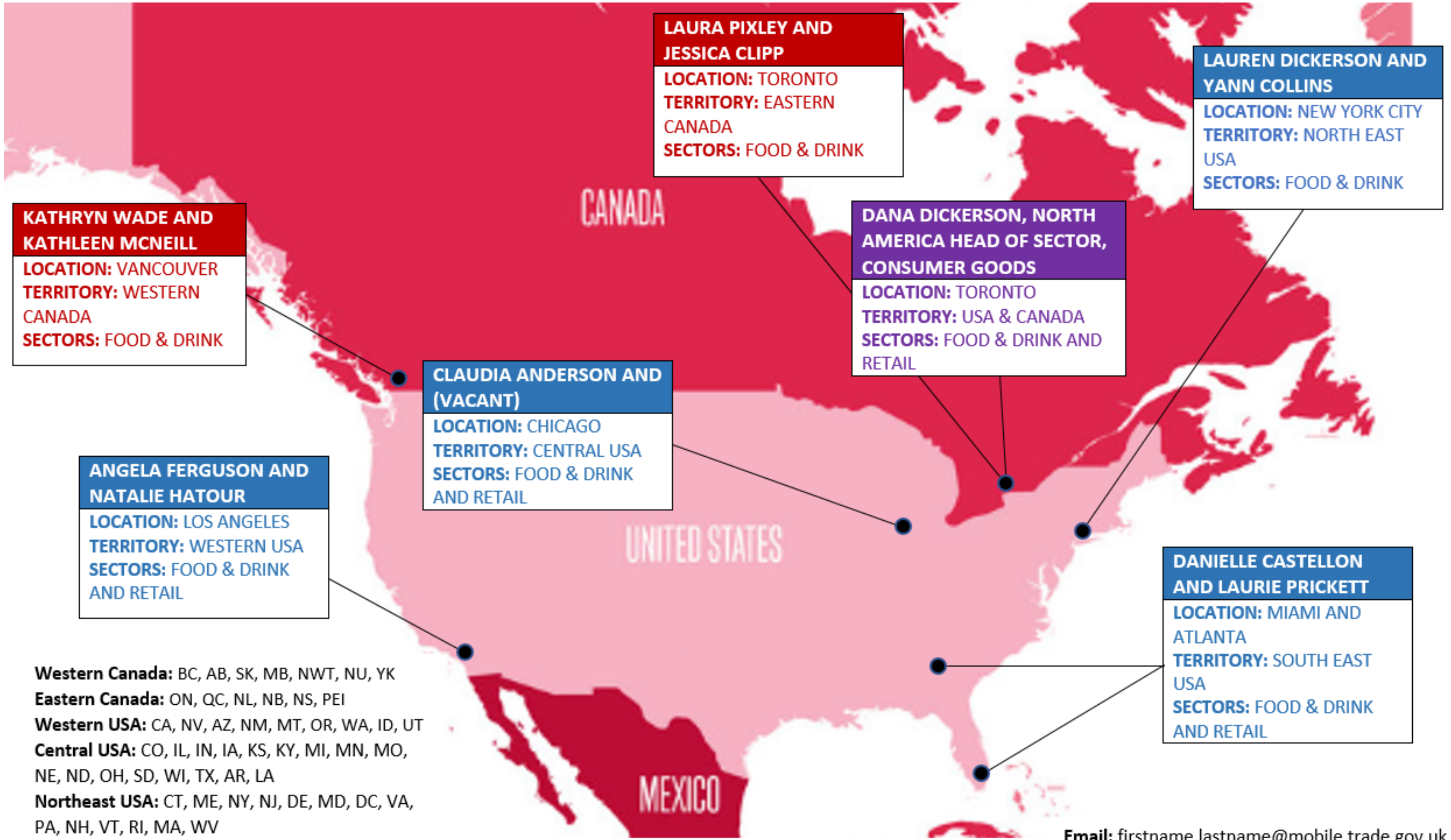
Dana Dickerson
North America Head of Sector – Consumer Goods

Department for International Trade

Agenda

- Introduction to DIT North America and our work
- Overview of the Canadian and US markets
- Impact of Covid-19 on the market
- North American recovery and medium and longer term opportunities and challenges for UK exports
- Compliance best practice

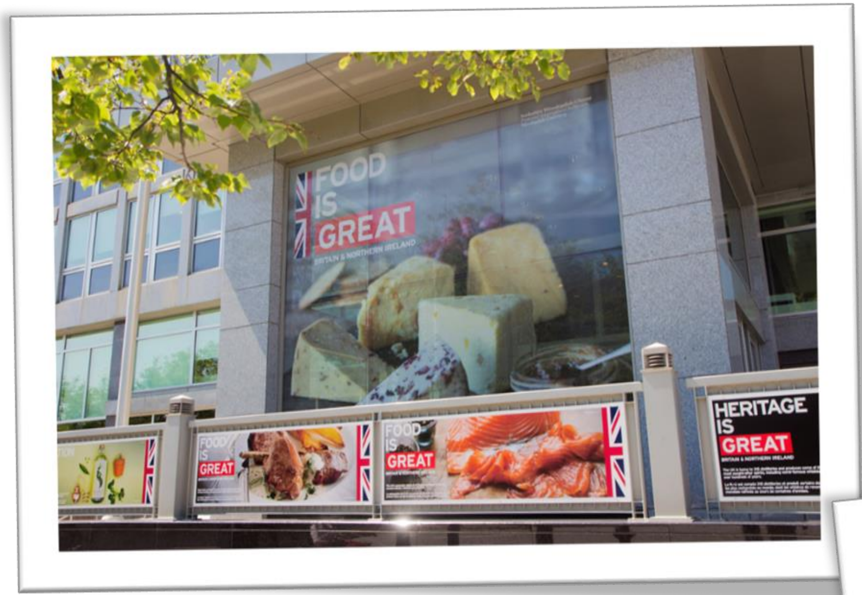
DIT North America Food & Drink



Western Canada: BC, AB, SK, MB, NWT, NU, YK
Eastern Canada: ON, QC, NL, NB, NS, PEI
Western USA: CA, NV, AZ, NM, MT, OR, WA, ID, UT
Central USA: CO, IL, IN, IA, KS, KY, MI, MN, MO, NE, ND, OH, SD, WI, TX, AR, LA
Northeast USA: CT, ME, NY, NJ, DE, MD, DC, VA, PA, NH, VT, RI, MA, WV
Southeast USA: FL, GA, NC, SC, MS, TN, AL, PR

Email: firstname.lastname@mobile.trade.gov.uk

DIT Trade Promotion Work in Market



The meat of the matter

British meat is known for its strong native breeds heritage, regional variations, high welfare standards, thorough traceability and diversity of feed - no growth-promoting hormones.

Welsh lamb, in particular, gained traction in the Canadian market in 2016, driven by increased retail listings across Canada.

British beef may soon become just as popular as lamb, due to two recent developments. In 2015, beef from UK facilities registered with the CFIA became eligible for export to Canada. In addition, CETA, which is expected to come into force this year, will eliminate the customs duty payable on imported UK beef, giving it the same duty-free access that pork and lamb producers already enjoy.

Proof of the distinctive character of UK meats, both Scotch and Welsh beef and lamb have been awarded European PGI (Protected Geographical Indication) status, recognising their special regional significance.

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CANADIAN MARKET OVERVIEW

Canada overview

37.6 million people
80% urban population
English & French

10 Provinces
3 Territories
6 Time Zones

2nd largest country by land

40x size of UK

Strong cultural affinity with UK, increasingly multicultural population

Canada Market Characteristics

- Significant global producer of beef and pork, active exporter
- Highly integrated with the United States
- High consolidation – 7 companies control 40% of the meat market
- Decline in red meat consumption

Canadian livestock production and export

<u>*World top 10 beef exporters - 2018*</u>

1,000 metric tonnes, carcass weight equiv.

		(% of world exports)
Brazil	2,083	20%
Australia	1,662	16%
India	1,556	15%
United States	1,432	14%
New Zealand	633	6%
Argentina	508	5%
Canada	502	5%
Uruguay	466	4%
Paraguay	365	3%
E.U.	351	3%
Total	**10,553**	

Source: USDA

- 11.58 million cattle and calves in 2018 on approximately 73,600 Canadian farms and ranches. Alberta accounts for approximately 41% of this inventory. Farm cash receipts from the sale of cattle and calves in 2018 totalled $9.1 billion.

- In 2018, 630,769 head of cattle were exported to the United States for breeding, feeding and processing, with fed animals exported for slaughter representing the largest share of exports (37.9%).
- Canada exported 597,500 tonnes of beef and cattle valued at $3.7 billion in 2018, representing 44 per cent of beef production (including live slaughter cattle exported).
- 38% of domestic beef slaughter is exported. The United States is the major export market for Canadian beef (74% of exports).

Canadian livestock production

- In 2018 Canada produced 14.17 million hogs, up 1.7% from the previous year, on approximately 8,170 farms. Farm cash receipts from the sale of slaughter hogs in 2018 totalled $4.1 billion.
- In 2016 Canada produced 825,400 sheep and lambs, up 1.4% from the previous year, on approximately 9,390 farms. Canadian sheep production is primarily located in Ontario, Quebec and Alberta. Farm cash receipts for sheep and lambs in 2018 totalled $185.8 million.

Canadian Beef Imports

Canada: Beef Imports, January - June (metric tons, CWE*)							
Partner Country	**Quantity**			**% Market Share**			**% Change**
	2017	**2018**	**2019**	**2017**	**2018**	**2019**	**2019/2018**
World	**121,247**	**128,778**	**108,588**	**100.00**	**100.00**	**100.00**	**- 15.68**
EU28	708	984	2,921	0.58	0.76	2.69	196.96
United States	76,626	78,844	66,941	63.20	61.22	61.65	- 15.10
New Zealand	13,869	14,733	11,794	11.44	11.44	10.86	- 19.95
Australia	13,431	16,091	11,326	11.08	12.50	10.43	- 29.61
Uruguay	11,410	10,802	9,499	9.41	8.39	8.75	- 12.06
Mexico	1,892	2,582	3,996	1.56	2.00	3.68	54.76
All other countries	4,019	5,726	5,032	3.31	4.45	4.63	-12.12

*Source: Global Trade Atlas / *Conversion to carcass weight equivalent (CWE) at 1.4 for fresh, chilled and frozen meat, and at 1.79 for salted and processed meat*

Canadian Beef Imports

HS 0201 - Meat of Bovine Animals -- Fresh or Chilled

	2015	2016		2017		2018		2019	
	Value (Cad)	Value (Cad)	% change	Value (Cad)	% change	Value (Cad)	% change	Value	% change
United States	$797,685,820	$698,477,102	-12%	$729,869,002	4%	$670,945,498	-8%	$597,990,566	-11%
Mexico	$11,127,666	$12,798,247	15%	$12,768,952	0%	$24,484,544	92%	$41,954,822	71%
Australia	$32,324,400	$25,848,023	-20%	$21,595,143	-16%	$19,742,984	-9%	$16,286,516	-18%
New Zealand	$5,945,326	$7,090,634	19%	$3,875,611	-45%	$4,441,840	15%	$5,449,736	23%
Japan	$1,193,327	$1,796,839	51%	$2,489,305	39%	$3,019,457	21%	$2,997,359	-1%
United Kingdom	$886	$2,232,185	251840%	$767,742	-66%	$1,419,795	85%	$150,898	-89%
Ireland	$0	$54,970	-	$659,604	1100%	$193,337	-71%	$154	-100%
Argentina	$0	$34,727	-	$110,905	219%	$156,722	41%	$277,376	77%

HS 0202 - Meat of Bovine Animals - Frozen

	2015	2016		2017		2018		2019	
	Value (Cad)	Value (Cad)	% change	Value (Cad)	% change	Value (Cad)	% change	Value	% change
Australia	$196,116,549	$121,727,944	-38%	$96,716,514	-21%	$118,663,393	23%	$89,419,960	-25%
New Zealand	$130,432,640	$100,277,425	-23%	$101,664,095	1%	$98,977,896	-3%	$75,576,721	-24%
Uruguay	$75,342,392	$81,030,801	8%	$60,539,864	-25%	$49,512,505	-18%	$43,204,403	-13%
United States	$49,297,477	$43,221,958	-12%	$36,100,089	-16%	$41,112,983	14%	$34,937,952	-15%
United Kingdom	$775	$439,291		$1,026,897	134%	$1,007,310	-2%	$13,236,199	1214%
Mexico	$643,310	$6,090,175	-	$9,858,633	-	$11,686,424	-	$8,141,991	-30%
Ireland	$0	$1,159,800	-	$296,168	-74%	$1,254,143	323%	$5,123,393	309%
Japan	$7,148	$0	-100%	$3,343	-	$0	-	$215,561	-
Argentina	$0	$0		$94,893	-	$0	-	$57,890	-

Canadian Pork Imports

Canada Pork Imports: January - June (metric tons, CWE*)							
	Quantity			% Market Share			% Change
	2017	2018	2019	2017	2018	2019	2019/2018
World	**105,789**	**112,005**	**122,796**	**100.00**	**100.00**	**100.00**	**9.63**
EU28	12,854	17,270	15,277	12.15	15.42	12.44	- 11.54
United States	90,674	93,387	105,719	85.71	83.38	86.09	13.20
Denmark	2,076	2,975	3,995	1.96	2.66	3.25	34.25
Germany	2,365	2,864	3,197	2.24	2.56	2.60	11.63
Spain	2,182	2,323	2,117	2.06	2.07	1.72	- 8.88
Poland	3,776	5,259	2,008	3.57	4.70	1.63	- 61.82
All other countries	4,716	5,197	5,760	4.46	4.64	4.69	10.83

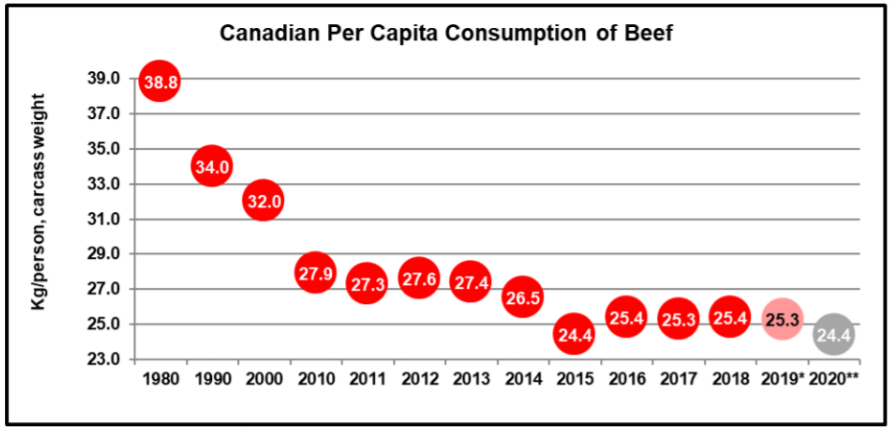
Source: Global Trade Atlas / *Conversion to carcass weight equivalent at 1.3

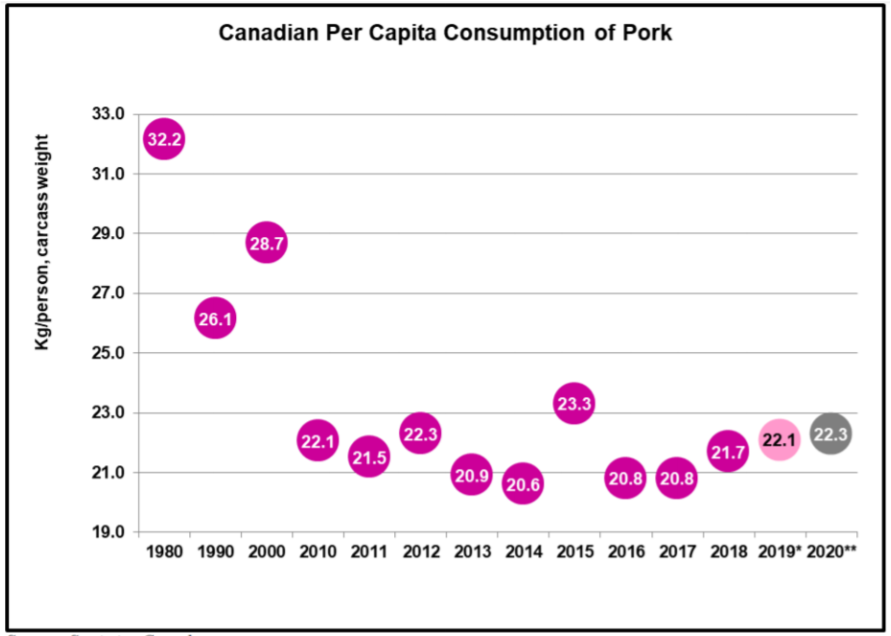
Canada Meat Consumption

Meat Consumption in Canada (Pounds per Capita)
Retail Weight (beef, pork); Carcass Weight (poultry)

	Beef	Pork	Chicken
2003	51.21	42.04	65.90
2004	49.23	44.97	67.04
2005	47.95	38.65	67.73
2006	47.33	39.20	67.92
2007	48.30	42.11	68.32
2008	46.96	40.04	67.84
2009	44.64	39.48	68.61
2010	43.96	36.95	67.17
2011	42.99	36.02	66.12
2012	43.25	37.41	65.54
2013	42.95	35.05	66.29
2014	41.67	34.48	68.56
2015	38.12	38.91	70.46
2016	39.51	34.79	72.02
2017	39.48	34.83	73.21
2018	39.82	36.31	76.32

Source: Statistics Canada





Canadian Tariff Rate Quota

The access level for the beef and veal TRQ is 76,409,000 kilograms.

- Within the TRQ, there are two country-specific reserves and a Most-Favoured-Nation (MFN) pool:
  - 29,600,000 kilograms is available within the country-specific reserve for imports from New Zealand (NZ);
  - 35,000,000 kilograms is available within the country-specific reserve for imports from Australia;
  - 11,809,000 kilograms is available within the MFN pool for imports from eligible non-FTA countries.

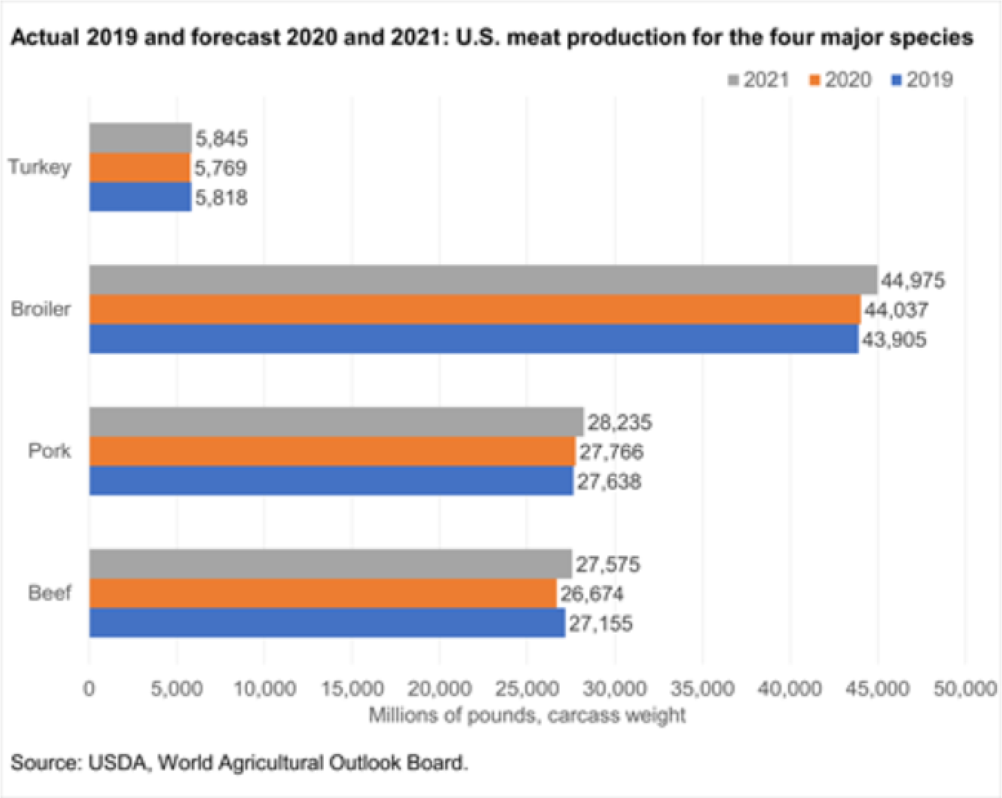
- Imports within access commitment are tariff-free, those outside of access commitment are subject to a TRQ of 26.5%.

- UK beef currently has unlimited duty-free access under the CETA agreement.

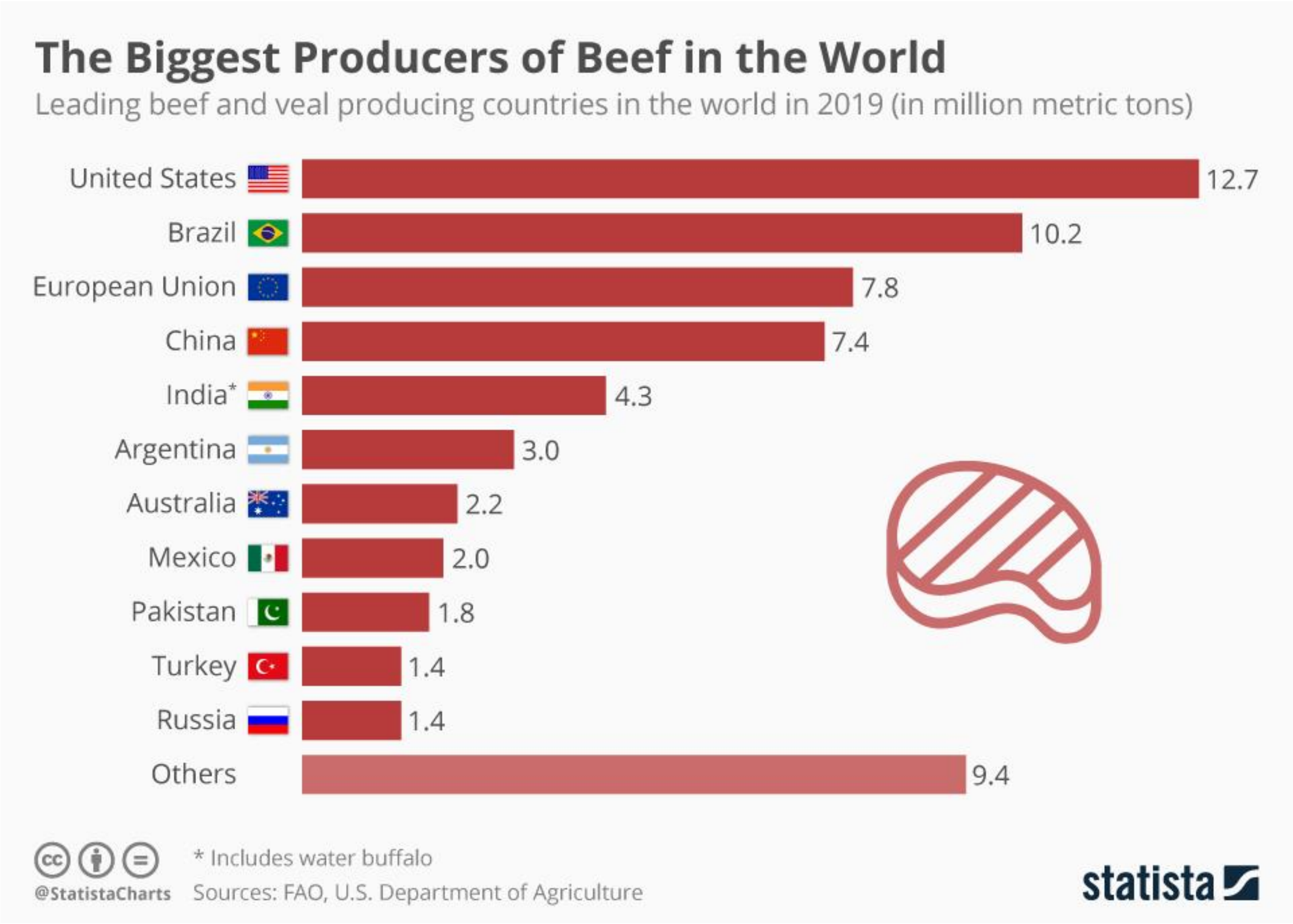
US MARKET OVERVIEW

The US Meat Market

- Meat in the United States is a $50.4 billion industry, having experienced a 1% growth in 2019 (+1.7% for beef).
- In 2018, the US produced 26.9 billion pounds of commercial beef, with 11.7% of it dedicated to the export market.



The Biggest Producer of Beef in the World



US Domestic Producers

- **JBS USA Holdings Inc** (Greely, CO)
  Plants: 44 Employees: 73,000
- **Tyson Foods Inc** (Springdale, AK)
  Plants: 111 Employees: 122,000
- **Cargill Meat Solutions Corp** (Wichita, KS)
  Plants: 26 Employees: 28,000
- **Sysco Corp** (Houston, TX)
  Plants: 17 Employees: 1,200
- **Smithfield Foods Inc** (Smithfield, VA)
  Plants: 60 Employees: 50,000
- **Hormel Foods Corp** (Austin, MN)
  Plants: 33 Employees: 19,000

- Top Livestock Slaughtering States (Cattle): **Nebraska, Kansas, Texas, Colorado, California, Wisconsin, Washington, Pennsylvania**.

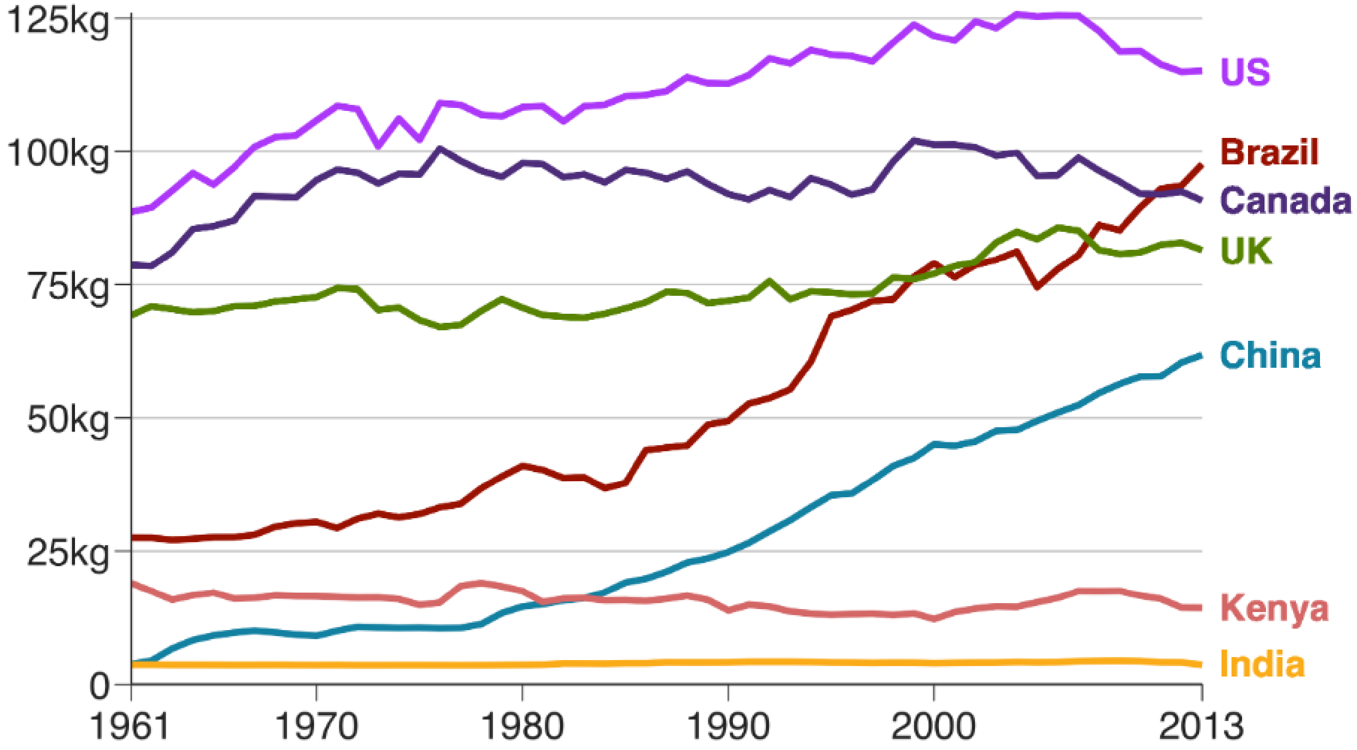
US Red Meat Imports

- In 2019, 3.06bn pounds of beef were imported into the United States. As of April 2020, 1.04bn pounds of beef have been imported into the US, a 3.3% increase over last year.
- The 4 main countries of origin for imported beef are Canada (26% share of imports), Australia (24%), Mexico (19%), and New Zealand (14%), respectively (Beef and veal imports as of April 2020 last 52 weeks, ERS/USDA).
- Majority of imported beef from outside North America is destined for foodservice. Some products like ‘never ever’ beef, Australian tenderloins, Uruguayan 100% grassfed beef, etc. are going into retail.
- Irish Celtic Beef from Kepak was being promoted in Massachusetts-based Roche Bros supermarket for St Patricks Day.
- In 2019, 218 million pounds of lamb were imported into the United States. Australia (75%) and New Zealand (24%) control the market.

US Meat Consumption

- US Meat Consumption In The World

Average annual consumption per person

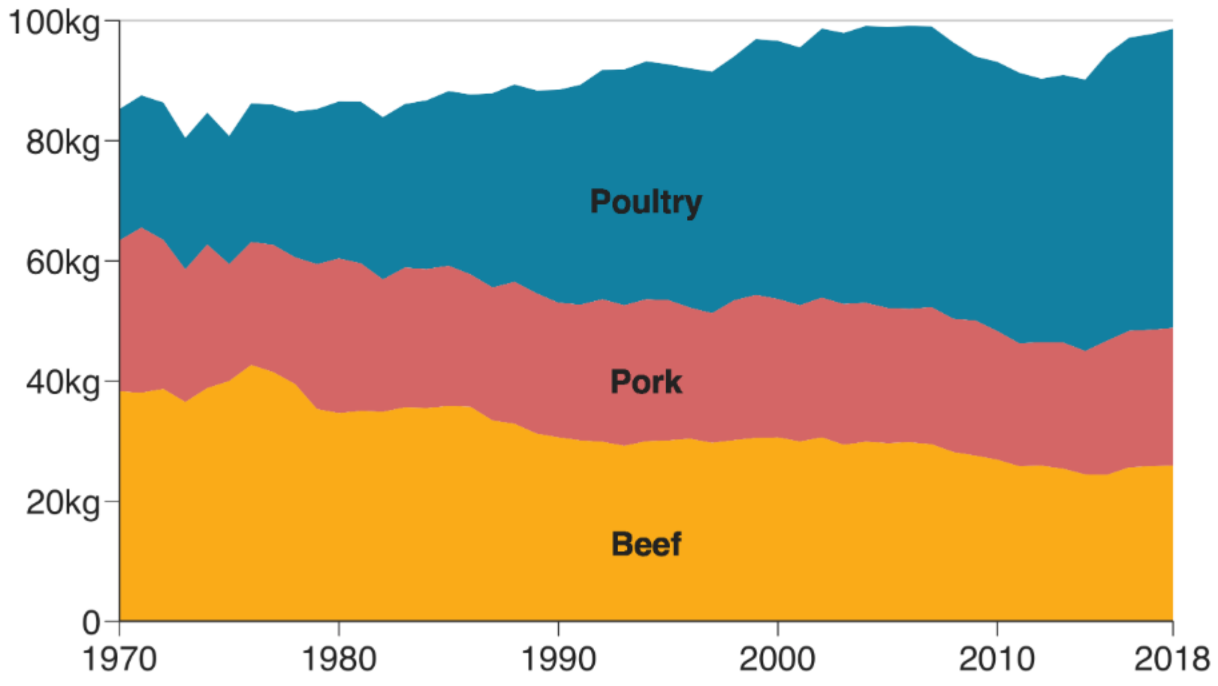


Source: UN Food and Agriculture Organization

The US Consumer

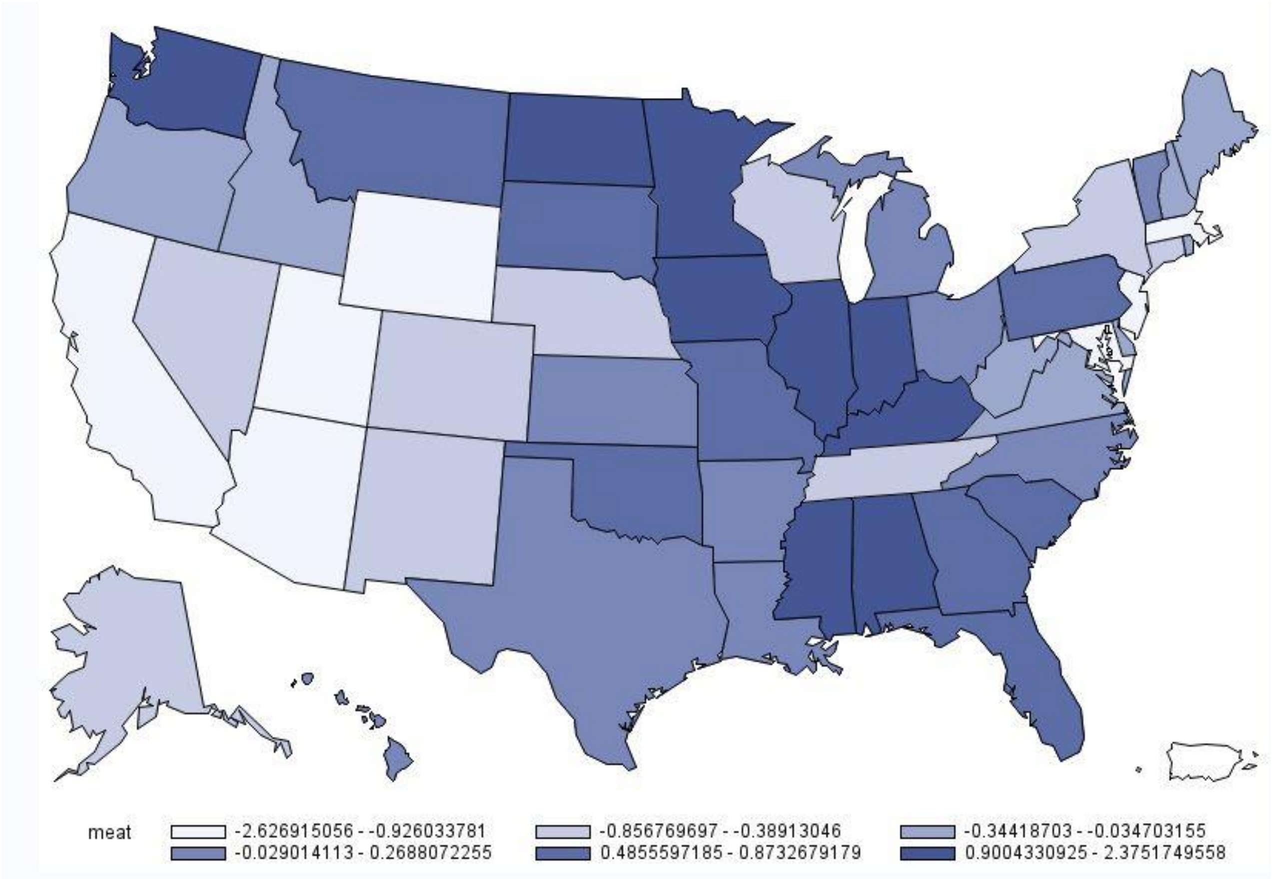
- US meat consumption in the US has changed over the years.

Average annual consumption per person, by type of meat

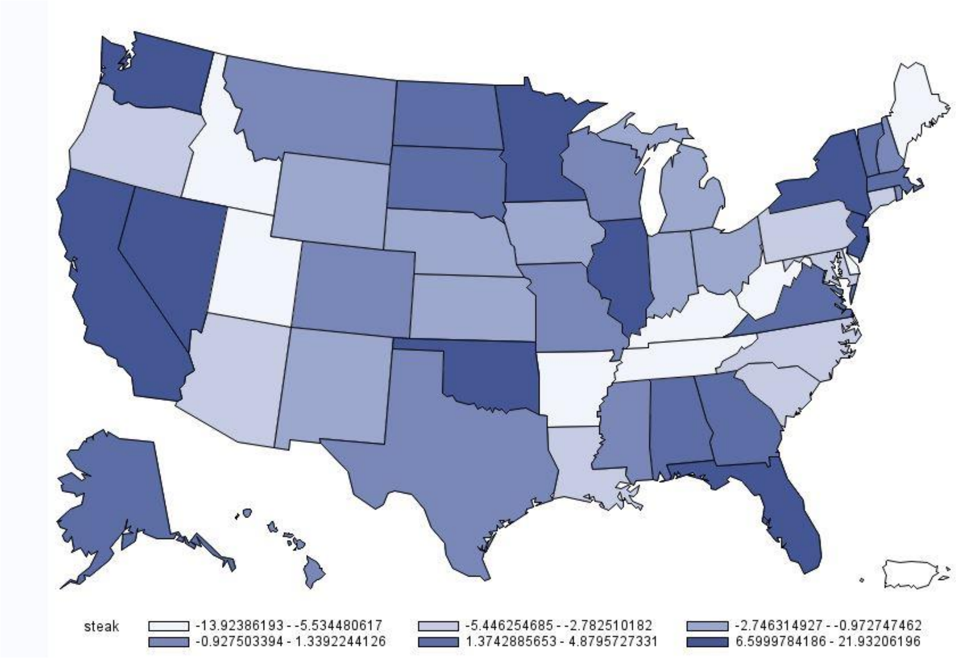


Source: USDA

Overall Meat Demand by State

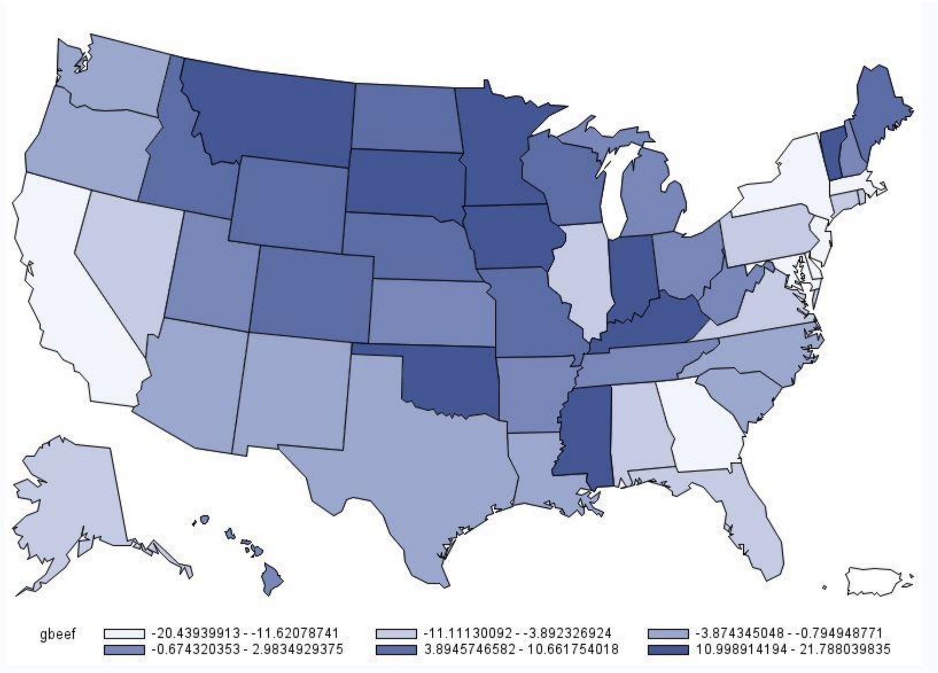


Meat Demand by State: Steak vs Ground Beef



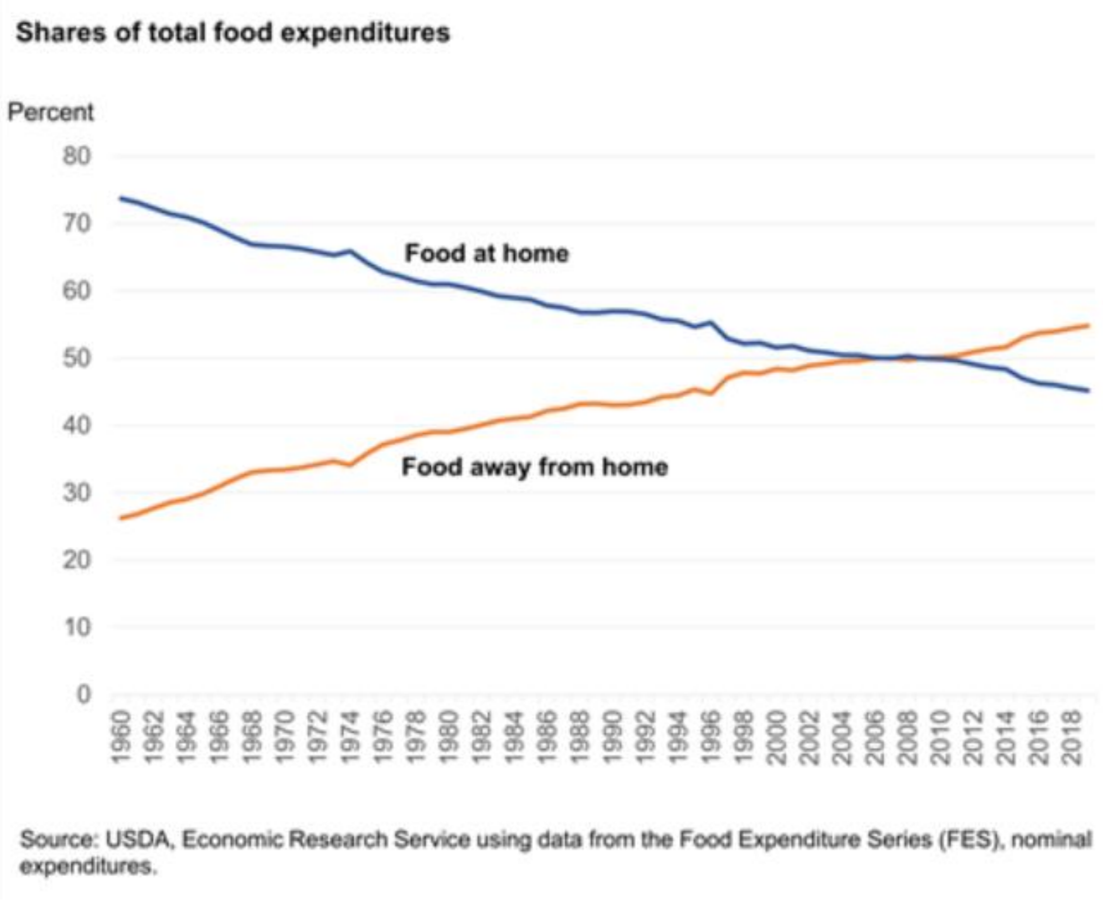
Steak / Fine Cuts

Ground Beef



Americans (Were) Eating Out More and More

- In 2019, the share of food at home was 45.2%, and food away from home was 54.8%.



US Trade policy

- **US TRQ**
  - UK will sit in WTO ‘Other Countries’ tariff rate quota (65,005 tons). Imports over access commitment tariffed at 26.4%.
  - Other competitors that use this quota include Ireland, Japan, the Netherlands, France, Lithuania, Namibia and Brazil.
  - TRQ offered on a first-come, first-served basis to the eligible countries.
  - As of June 20th, 6.76% of the quota has been filled. In previous years it has achieved a 100% fill rate.
- **US Section 301 Large Civil Airbus Dispute**
  - 25% tariff applied to UK pork products exported to the USA
- **UK-US FTA**
  - Opportunities to resolve tariff & non-tariff barriers for UK exports
- **DIT Report a Trade Barrier Service**
  - https://www.great.gov.uk/report-trade-barrier/

COVID-19 IMPACT ON NORTH AMERICAN RED MEAT MARKET

Impact of C-19 on Beef and Pork Markets

February 2020

- African Swine Fever's disruption of livestock and meat markets
- Trade tensions' influence on agri-food markets
- Global and domestic red meat demand
- U.S. growth in beef and pork production
- Global economic impact of coronavirus – but concerns primarily around exports to Asia, not domestic impact
- Food preferences shifting, but domestic demand for red meat remaining robust
- China's ability to rebuild its hog herd

Impact of C-19 on Beef and Pork Markets

March

- C-19 hits North America, panic buying, demand shift from foodservice to retail.
- Retailers bid up prices - beef packer margins swell to over $600 per head.
- High beef slaughter rates, 40k/week more than expected.
- Unemployment skyrocketing, recession concerns loom.
- Large number of hogs in the US production pipeline, high slaughter (11% over last year).
- US lamb retail sales were up 54 percent in the week ending March 15

Impact of C-19 on Beef and Pork Markets

April

- Consumers stockpiling runs its course (for time being).
- Foodservice outlets shuttered, demand dip.
- Restaurants pivot to take out and delivery, foodservice product transitioning to retail.
- Slaughter rates cut back. US export volumes remain strong, pork exports up 40% over prior year.

Canadian beef imports Jan-Apr 2020

HS 0201 - Meat of Bovine Animals -- Fresh or Chilled		
	Jan-Apr 2020	
	Value	% change
United States	$245,315,295	41%
Mexico	$14,398,585	37%
Australia	$9,101,265	70%
New Zealand	$2,578,845	54%
Japan	$1,383,105	20%
United Kingdom	$25,761	-69%
Ireland	$125,700	-
Argentina	$93,249	-3%

HS 0202 - Meat of Bovine Animals - Frozen		
	Jan-Apr 2020	
	Value	% change
Australia	$21,124,854	-35%
New Zealand	$41,443,264	24%
Uruguay	$38,848,452	38%
United States	$14,058,753	37%
United Kingdom	$10,282,212	87%
Mexico	$3,455,156	-12%
Ireland	$6,774,134	830%
Japan	$5,329	-98%
Argentina	-	-

Impact of C-19 on Beef and Pork Markets

May

- COVID-19 infiltrates meat processing facilities, forcing the closure of some slaughter plants and slowing the production pace at others. Pig crop is estimated to have under-killed by about 3.6m head between March and May. Some euthanisation of pigs but many put on low energy diets. Pork packer margins over $100 a head.
- Beef production plunges and there is a flurry of buying interest, price levels soar. Additional waves of stockpiling following coverage of disruption.
- President Trump issues executive order requiring meat plants to remain in operation.
- Logistical shift from foodservice to retail distribution has improved. Some areas allow restaurants to re-open.

April and May Headlines

McDonald's Canada begins importing beef from U.S. amid Canadian supply issues

US consumers rush to buy meat amid concerns over Covid-19 shortages

Agriculture department reported beef production down nearly 25% compared to last year, and pork production down 15%

2 Alberta meat plants affected by COVID-19 make up 70% of Canada’s beef processing capabilities

There are fears the US faces a coronavirus-driven meat shortage, but analysts say there's actually plenty to go around: 'We have the meat'

Impact of C-19 on Beef and Pork Markets

June

- Retail meat prices still high but beginning to reduce.
- Packing plants largely recover from disruption, slaughter is approx. 95% of normal. An estimated 800k – 1m head of fed cattle went un-slaughtered in April and May creating a huge backlog of cattle in US feedyards. Cash cattle prices retreat. Beef packer margins are high at $500/head but on the decline. Pork packer margins back down to $35/head.
- Supply is large again as demand from foodservice remains low. Restaurants beginning to reopen but still constrained.
- International demand for US exports is low. 3% decline in US beef exports expected for 2020 as a whole.
- US meat producers probing UK meat producers on domestic shortages vs exports.

Near term outlook

- Summer - Pressure on US cash cattle prices sustained as the backlog of fed cattle is processed. Steer weights are now 52 pounds heavier than they were at this time last year, animals are carrying a lot of fat. Pork prices to remain low.
- Autumn – Reduction in supply created by light spring cattle placements by feeders in March, April and May. Potential higher pork placing by Q4 or early 2021 resulting from pig herd liquidation in May/June, some industry downsizing expected reducing supply in the longer term.
- Longer term: Market must now address macroeconomic impact of the crisis. Unemployment has surged to around 13%. Beef and pork demand will be hampered by high unemployment through 2020 and probably well into 2021.
- Experts cautioning buyers to remain vigilant for a resurgence in coronavirus infections that could cause packing plants to shut once again.

North American recovery / re-opening status

- Major cities hardest hit, re-opening more slowly.
- US has had 2,624,873 total confirmed cases, 127,299 deaths. Canada has had 104,000 total confirmed cases, 8,615 deaths.
- Foodservice establishments, in many places almost exclusively limited to take out and delivery since March, are gradually reopening on-premise service under strict guidance.
- Even though many restaurants have re-opened to dine-in customers, there are spacing requirements that will depress sales and there is a general reluctance on the part of consumers to return to restaurants while the virus is still spreading.
- International tourism is expected to be closed through the summer of 2020, and international travel is currently limited.
- Significant growth in e-commerce, new routes to customer.

Opportunities and Challenges

Before Covid-19…

- Foodservice focus
- Breed and feed specificity
- Animal welfare and sustainability, farm and grass story
- Commitment to the market and investment
- Niche opportunities to build Brand UK
- Getting compliance right

Post-Covid…

- Above is all still important but watch foodservice recovery, explore specialty butchers, new distribution models (e.g. D2C)
- Speak to the emerging homebody economy
- Increased focus on local
- Stay connected with DIT for opportunities – our team mapping and staying alive to gaps caused by disruption/panic buying

A reminder on compliance for Canada…

- Shipping marks that are not properly or securely affixed to the carton can fall off in transit or at the warehouse before clearance/release, deeming the shipment non-compliant
- Shipping marks cannot be re-used within any 12 month period
- Shipping marks must match the OMIC
- Export health certificates must accompany all shipments of animal products, and they must be issued by the country of origin
- Entire consignments cannot be identified as one species if they contain multiple species
- Contents of a shipment/container must be properly declared (species, wording, etc.)
- Samples (for trade shows and for customers) need to be identified as samples on the certificate and on the cartons

Department for International Trade

GREAT

BRITAIN & NORTHERN IRELAND

MARKETING NORTH AMERICA

Susana Morris
Senior Export Manager – North America
Thursday, 2nd July 2020

Webinar

North America

802374 (B01267) 5-95

AHDB

Canada

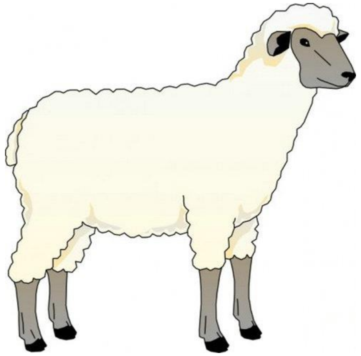
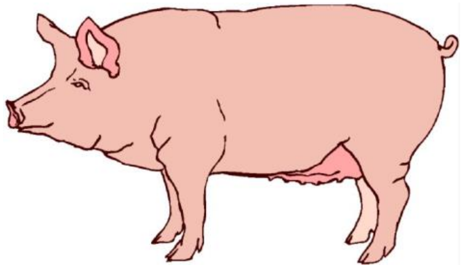
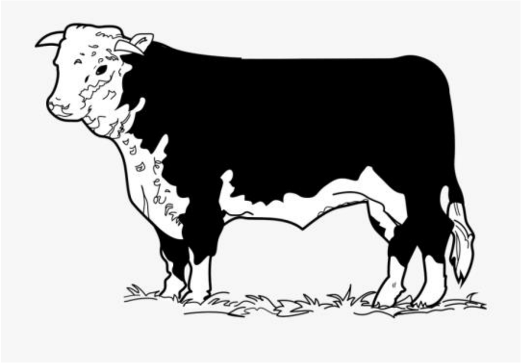
- Beef
- Lamb
- Pork

USA

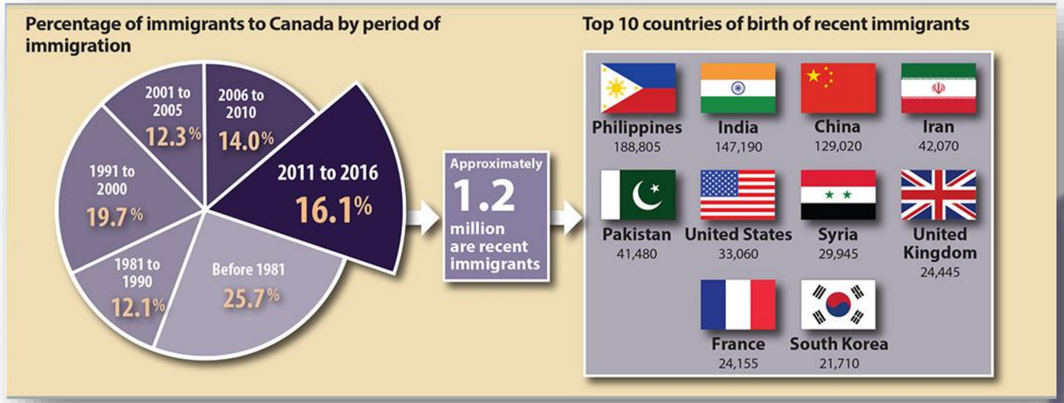
- Pork
- Beef
- Lamb

Mexico

- Pork
- Lamb

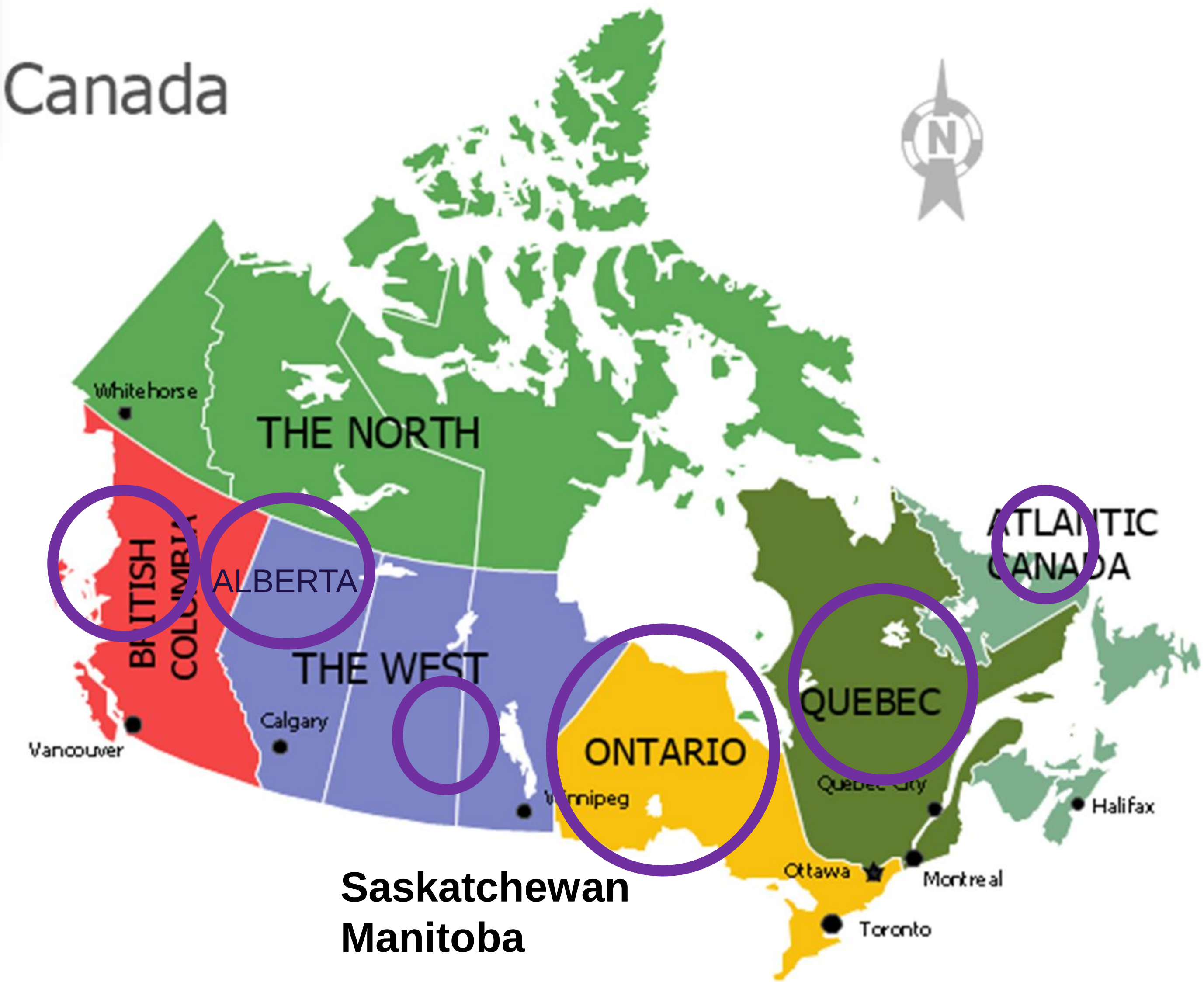
	UK	Canada	USA	Mexico
	33M	802Th	5M	9M
	5M	14M	75M	18M
	10M	11M	94M	35M

AHDB

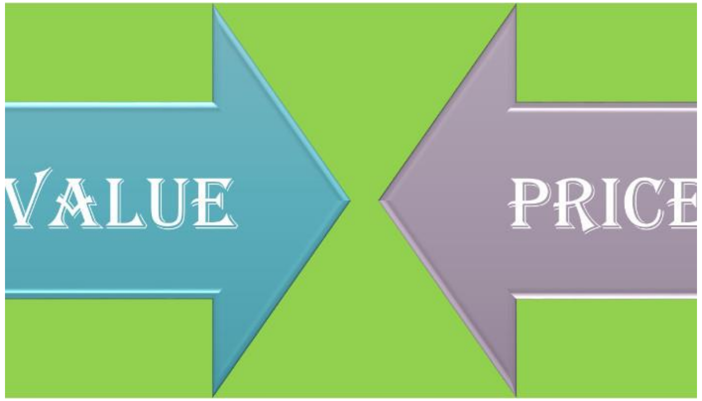


Mayor cities by population 2020

• Toronto	6.4M
• Montreal	4.3M
• Vancouver	2.7M
• Calgary	1.5M
• Edmonton	1.5M
• Ottawa	1.4M



Marketing trends



Marketing trends

Unverified labels: free range, free run, cage free, grass fed…

Note that, in Canada, **there is no independent inspection or verification** to ensure that producers using these labels are in fact raising their animals in the method indicated.

The same goes for terms like grass fed, nest laid or pasture raised and so on. Producers who use these labels on their products have **not been inspected** to make sure they're raising their animals in the method indicated, unless they are also certified under a program that audits and inspects to verify compliance.

https://humanecanada.ca/our-work/focus-areas/farm-animals/humane-certification/

Promotional Activities

AHDB

May 2019

Promotional Activities

2020/2021

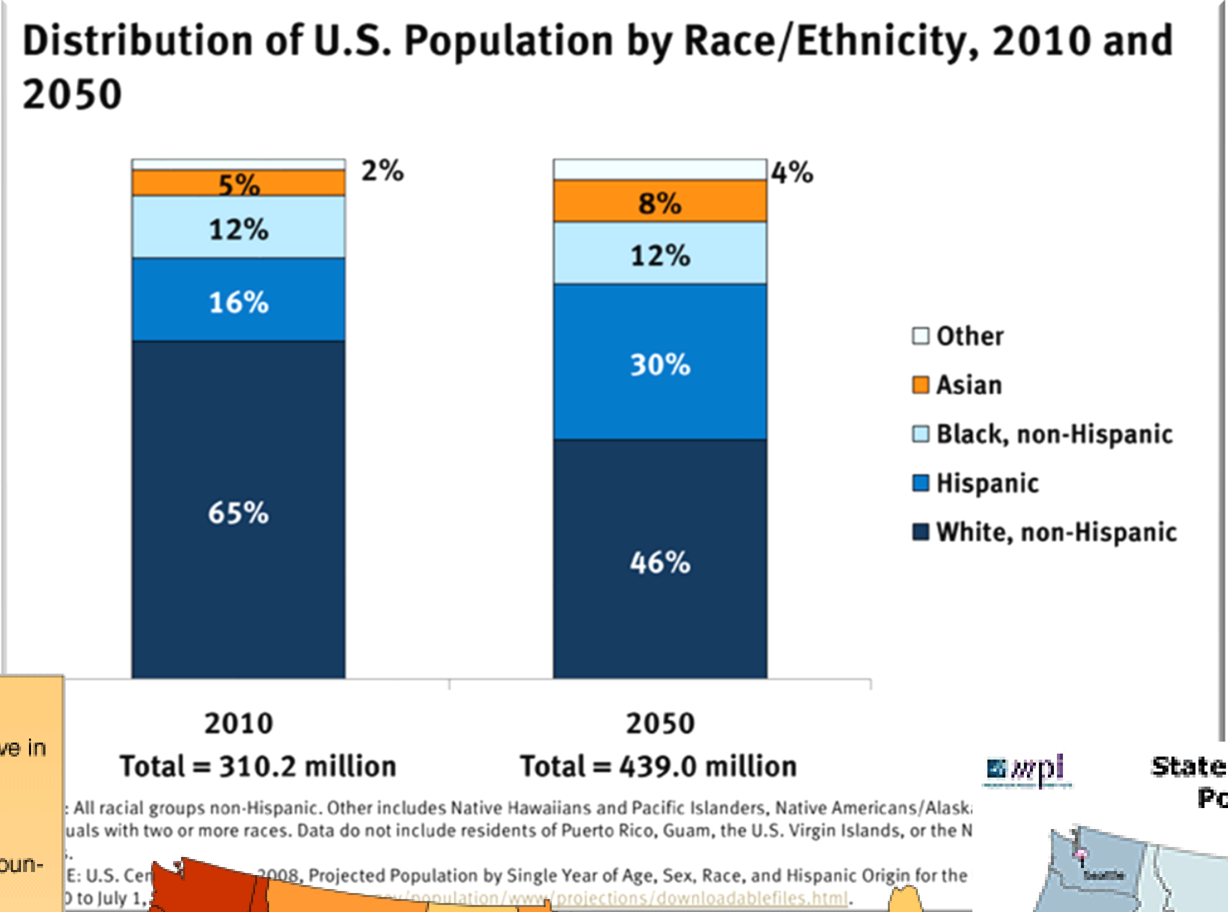
March 2021

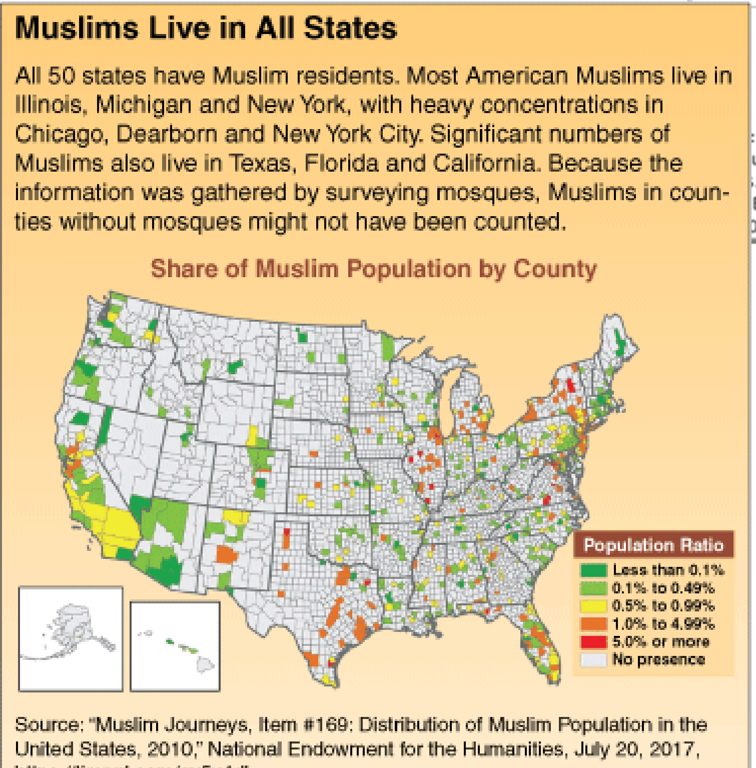
AHDB

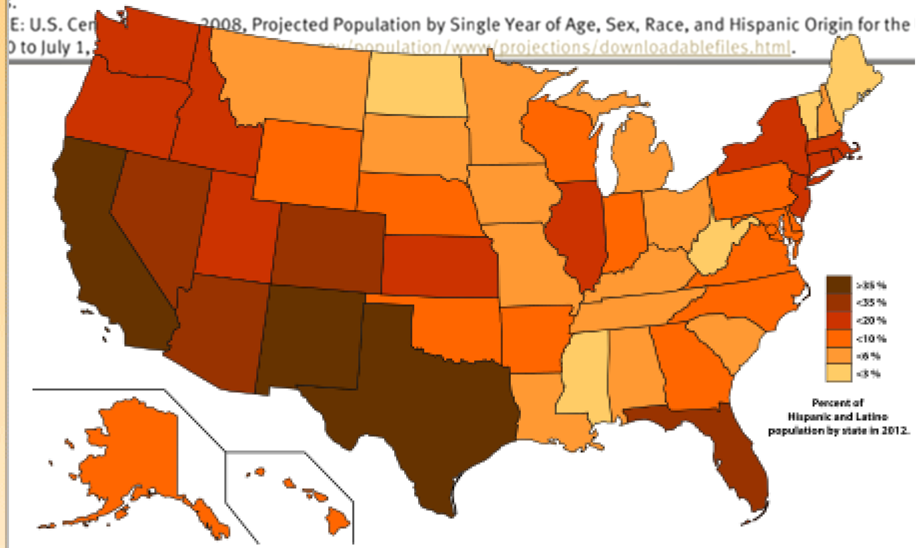

RUSSIA
AK
Fairbanks
Anchorage
CANADA
Pacific Ocean
Juneau

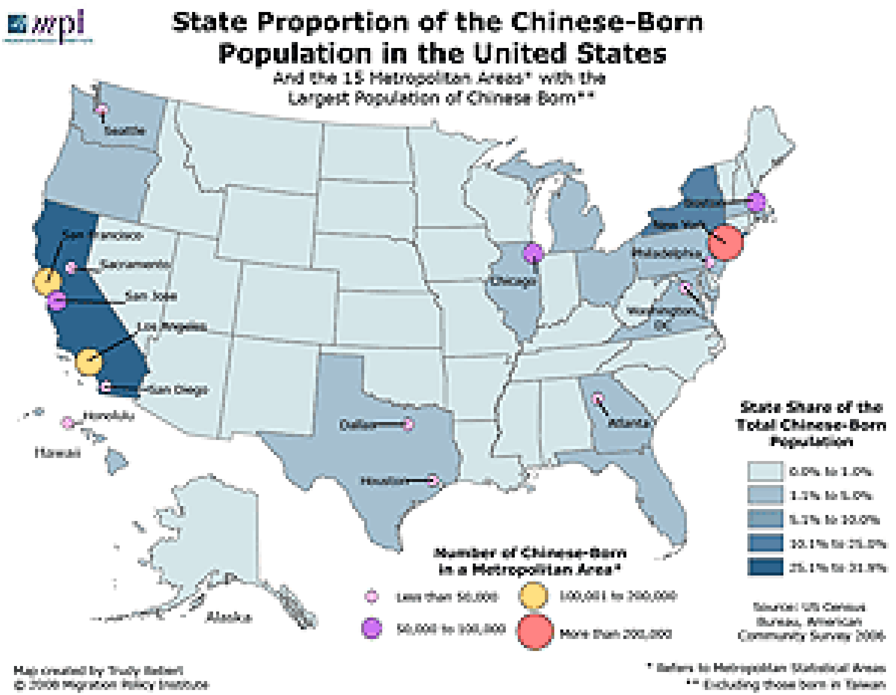

ENJOY MORE
BEEF
FLORIDA BEEF COUNCIL
Ford


AHDB


Distribution of U.S. Population by Race/Ethnicity, 2010 and 2050
2%
5%
12%
16%
65%
4%
8%
12%
30%
46%
Other
Asian
Black, non-Hispanic
Hispanic
White, non-Hispanic
2010
Total = 310.2 million
2050
Total = 439.0 million
: All racial groups non-Hispanic. Other includes Native Hawaiians and Pacific Islanders, Native Americans/Alask
uals with two or more races. Data do not include residents of Puerto Rico, Guam, the U.S. Virgin Islands, or the N
E: U.S. Cen 2008, Projected Population by Single Year of Age, Sex, Race, and Hispanic Origin for the
to July 1, /population/www/projections/downloadablefiles.html.

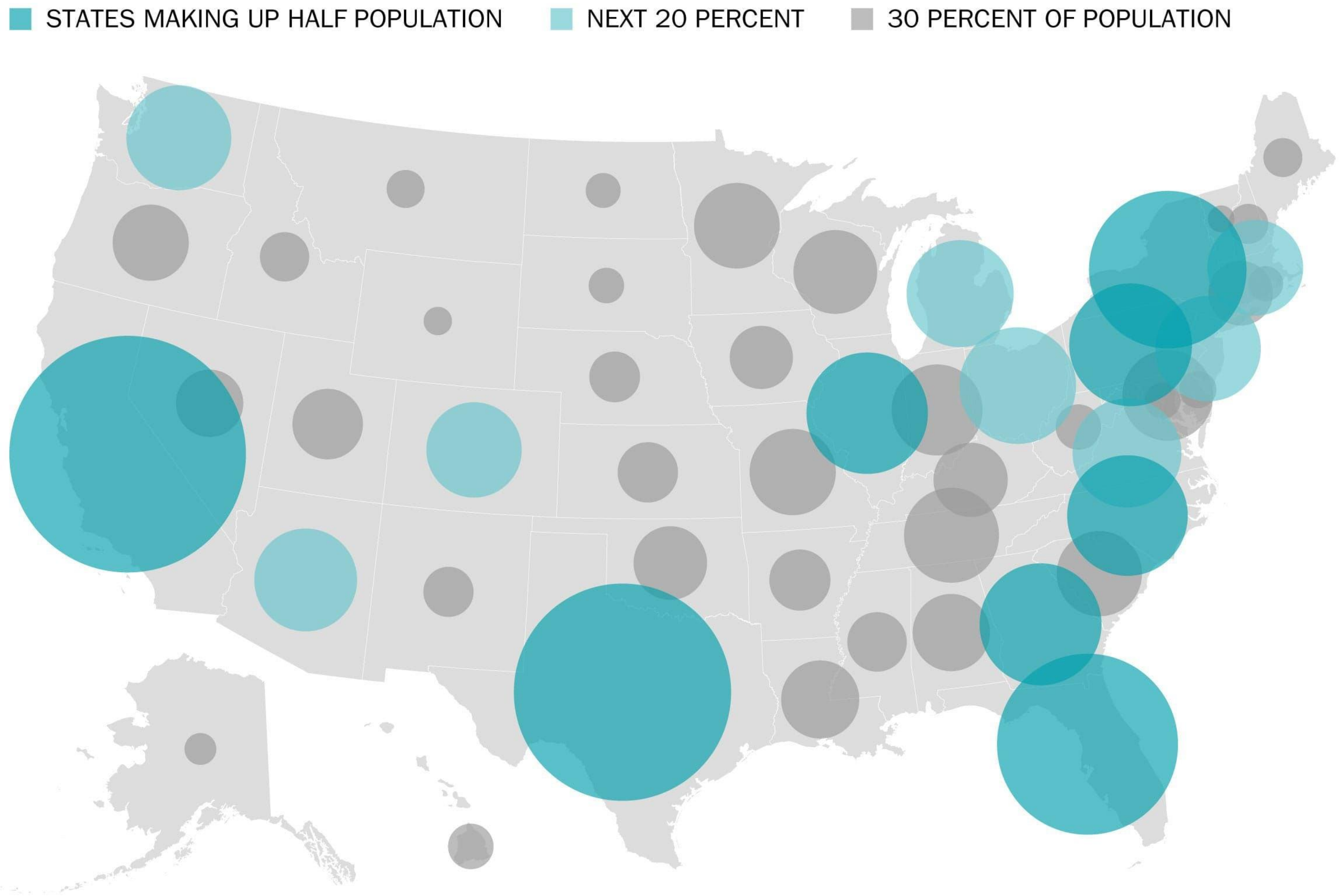

Muslims Live in All States
All 50 states have Muslim residents. Most American Muslims live in Illinois, Michigan and New York, with heavy concentrations in Chicago, Dearborn and New York City. Significant numbers of Muslims also live in Texas, Florida and California. Because the information was gathered by surveying mosques, Muslims in counties without mosques might not have been counted.
Share of Muslim Population by County
Population Ratio
Less than 0.1%
0.1% to 0.49%
0.5% to 0.99%
1.0% to 4.99%
5.0% or more
No presence
Source: "Muslim Journeys, Item #169: Distribution of Muslim Population in the United States, 2010," National Endowment for the Humanities, July 20, 2017,


>35 %
<35 %
<20 %
<10 %
<6 %
<3 %
Percent of
Hispanic and Latino
population by state in 2012.


mpi
State Proportion of the Chinese-Born
Population in the United States
And the 15 Metropolitan Areas* with the
Largest Population of Chinese Born**
Seattle
San Francisco
Sacramento
San Jose
Los Angeles
San Diego
Chicago
Boston
New York
Philadelphia
Dallas
Houston
Atlanta
Honolulu
Hawaii
Alaska
State Share of the
Total Chinese-Born
Population
Number of Chinese-Born
in a Metropolitan Area*
Less than 50,000
50,000 to 100,000
100,001 to 200,000
More than 200,000
Source: US Census
Bureau, American
Community Survey 2006
* Refers to Metropolitan Statistical Areas
** Excluding those born in Taiwan

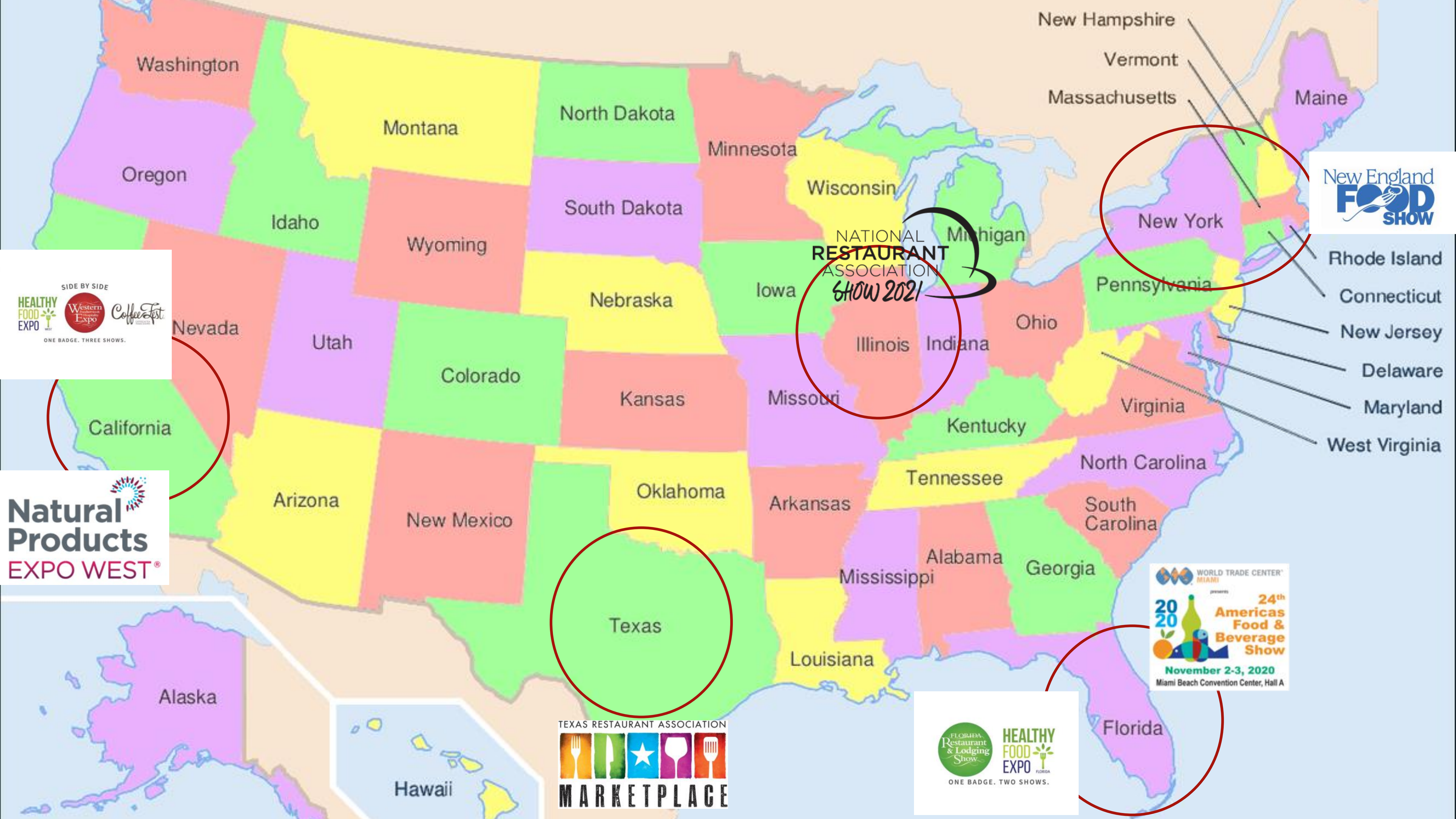
Population by state in 2040

2016 analysis by Demographics Research Group, Weldon Cooper Center for Public Service, University of Virginia.



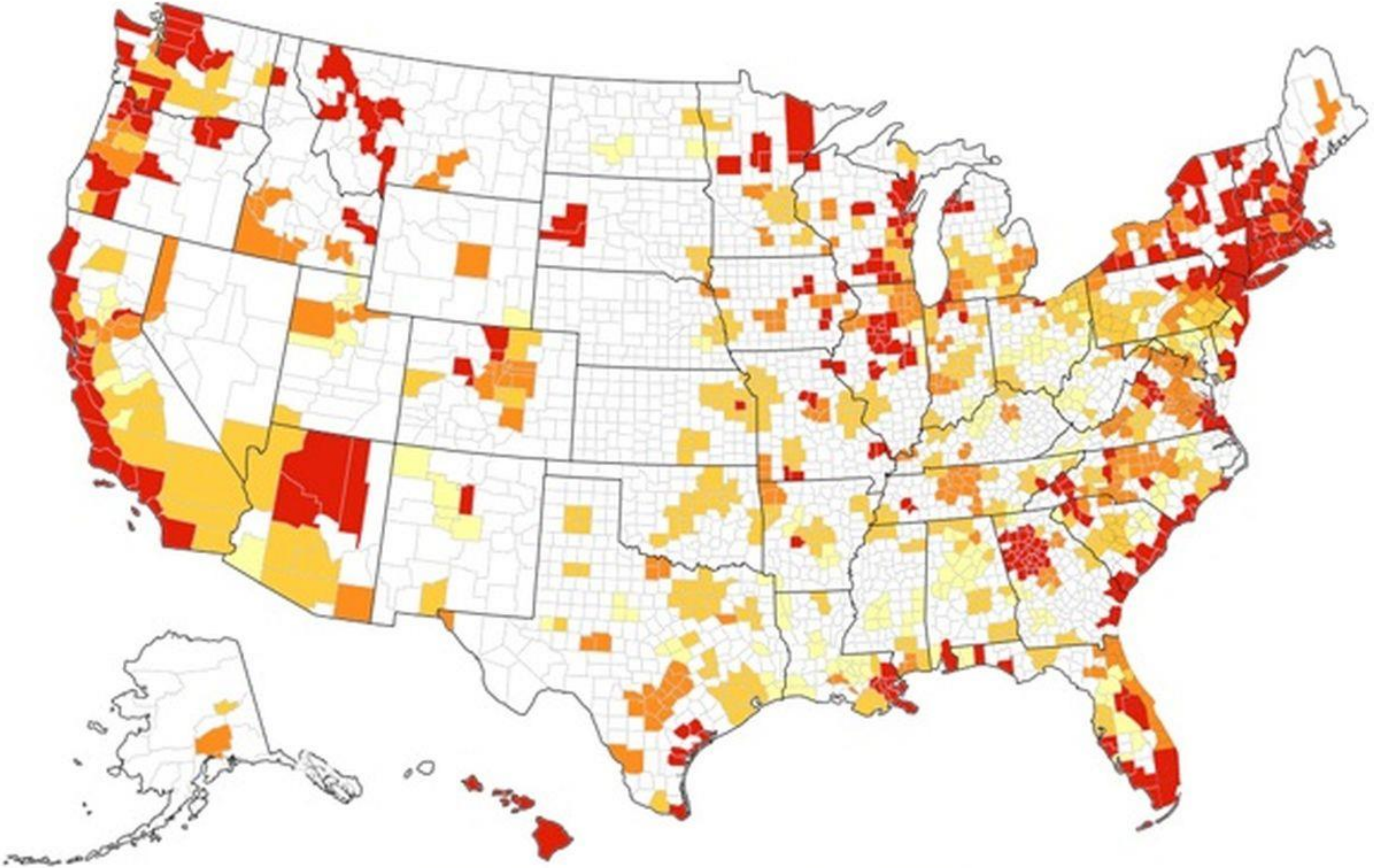
In about 20 years, half the population will live in 8 states:

California	40M
Texas	29M
Florida	22M
NY	19M
Pennsylvania	13M
Illinois	13M
Ohio	12M
Georgia	11M



Washington
Oregon
California
Nevada
Idaho
Montana
Wyoming
Utah
Arizona
Colorado
New Mexico
North Dakota
South Dakota
Nebraska
Kansas
Oklahoma
Texas
Minnesota
Iowa
Missouri
Arkansas
Louisiana
Wisconsin
Illinois
Michigan
Indiana
Ohio
Kentucky
Tennessee
Mississippi
Alabama
Georgia
Florida
South Carolina
North Carolina
Virginia
West Virginia
Pennsylvania
New York
Maine
New Hampshire
Vermont
Massachusetts
Rhode Island
Connecticut
New Jersey
Delaware
Maryland
Alaska
Hawaii
SIDE BY SIDE
HEALTHY FOOD EXPO
CoffeeFest
ONE BADGE. THREE SHOWS.
Natural Products EXPO WEST
NATIONAL RESTAURANT ASSOCIATION SHOW 2021
New England FOOD SHOW
TEXAS RESTAURANT ASSOCIATION MARKETPLACE
WORLD TRADE CENTER MIAMI
2020
24th Americas Food & Beverage Show
November 2-3, 2020
Miami Beach Convention Center, Hall A
HEALTHY FOOD EXPO
ONE BADGE. TWO SHOWS.

Most Restaurant and Bar Dense US Cities



Customer needs

Benefits

Transparency & integrity in the supply chain

Humane animal treatment

Creating better & healthier food systems

Environmental sustainability

Traceability

High Animal Welfare

No hormones /control of antibiotics

Working with the environment/Grass-Fed

RED TRACTOR CERTIFIED STANDARDS

American Humane CERTIFIED®

USDA ORGANIC

FOOD ALLIANCE CERTIFIED PRODUCER

American Grassfed®

100% FREE HORMONE 100% FREE

Animal Welfare APPROVED®

CERTIFIED HUMANE RAISED & HANDLED

global animal™ PARTNERSHIP

PCO CERTIFIED 100% GrassFed

RAISED WITHOUT™ ANTIBIOTICS

ANIMAL WELFARE APPROVED BY AGW

CERTIFIED GRASSFED BY AGW

CERTIFIED NON-GMO BY AGW

100% NATURAL NATURAL PRODUCT

Grass-Fed

ing meat.
10 YEAR ANNIVERSARY
global animal
PARTNERSHIP
100+ animal w
for beef, pork, c
Made Right Here
Pasture Raised Beef
Back Ribs
$4.99
Born, Raised and Harvested in the U.S.
Pasture Raised Beef
Delmonico Steak
$9.99
Born, Raised and Harvested in the U.S.
Pasture Raised Beef
Denver Steak
$9.99

NET WT 16 OZ
PORK RAISED WITH
NO
ANTIBIOTICS
& GROWTH HORMONES
HUMANELY
RAISED
PORK RAISED WITH 100%
VEGETARIAN FEED
GLUTEN FREE
THICK CUT APPLEWOOD SMOKED UNCURED BACON
NET WT 16 OZ
UNCURED TURKEY BACON

PROUDLY RAISED IN THE USA
Smithfield
ALL NATURAL
PREMIUM FRESH PORK
PORK TENDERLOIN
USDA PROCESS VERIFIED
juicy
100% MONEY-BACK GUARANTEE
TENDERLOIN
Pork Tenderloin 2 Pieces
Filete de Puerco 2 piezas
USE OR FREEZE BY
02.09.19
Product of USA
PRICE/LB.
NET WT./LB.
TOTAL PRICE
$4.08
2.80
$11.42
KEEP REFRIGERATED
juicy

Marketside
Butcher
NEVER EVER...
any added hormones
any added antibiotics
GRASS-FED
GROUND BEEF
80% LEAN / 20% FAT
KEEP REFRIGERATED
U.S. INSPECTED AND PASSED BY DEPARTMENT OF AGRICULTURE EST. 965
NET WT 16 OZ (1 LB) 453g

$8.45
Publix
$8.26
Publix
pork
ALL NATURAL
FRESH / NEVER FROZEN

GREAT - TASTING MEAT. NO ANTIBIOTICS. EVER.


NATIONAL
RESTAURANT
ASSOCIATION


GREAT
BRITAIN & NORTHERN IRELAND
BRITISH CHEESE
GRANDMA
specialty food association
PRESENTS THE
FANCY
FOOD
SHOW
JANUARY 21-23, 2018
SAN FRANCISCO


THE FRESH MARKET
STOP


FOOD IS GREAT
BRITAIN & NORTHERN IRELAND
AHDB


NSA
www.nationalsheep.org.uk
NATIONAL SHEEP ASSOCIATION
Join NSA today
to make a difference
and for a chance to win a
JFC-Agri sheep foam footbath
and 20 litres of hoof solution
AGRI
FarmWorks
by Shearwell Data
well.co.uk


22nd Americas Food and Beverage
Show & Conference
October 1-2, 2018
Miami Beach Convention Center, Hall A
Miami Beach, Florida U.S.A
www.americasfoodandbeverage.com

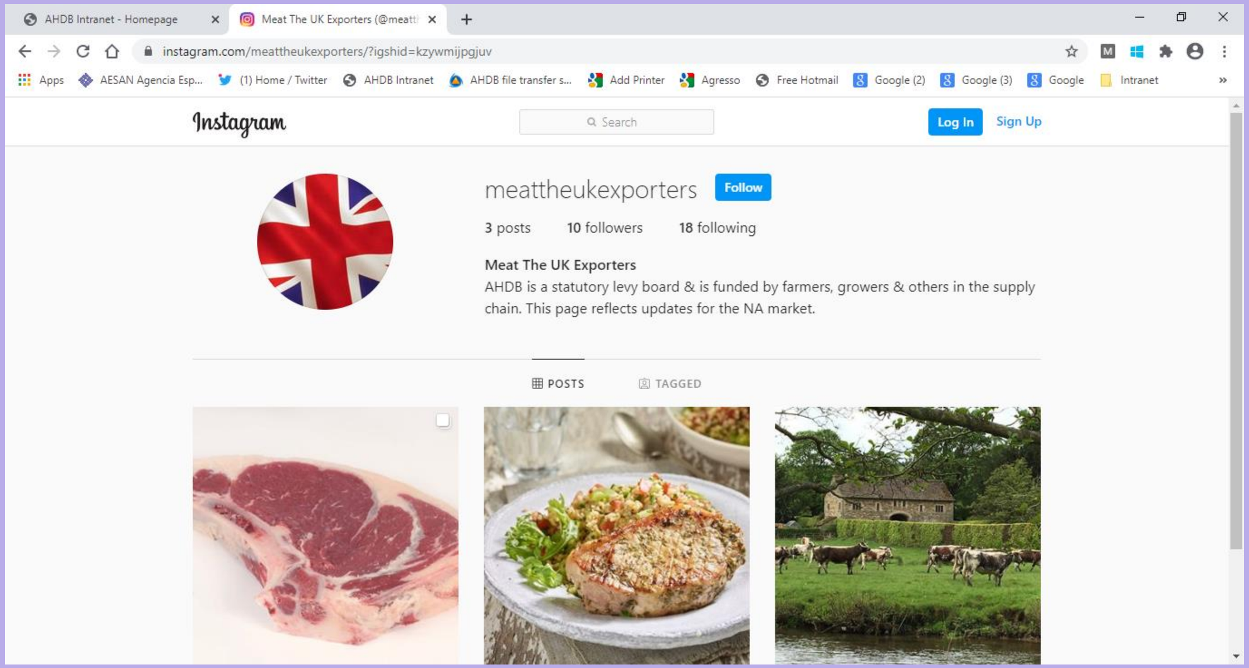
Promotional Activities

The Mesulam Group

Communications & Public Relations

PR
Events
Direct Mail
AHDB
IMPORTERS
digitalhub
EXPORTERS
Webinars / Seminars
Blogs
Advertising Online / Offline
Email
SEO / PPC

AHDB



https://instagram.com/meattheukexporters?igshid=kzywmijpgjuv

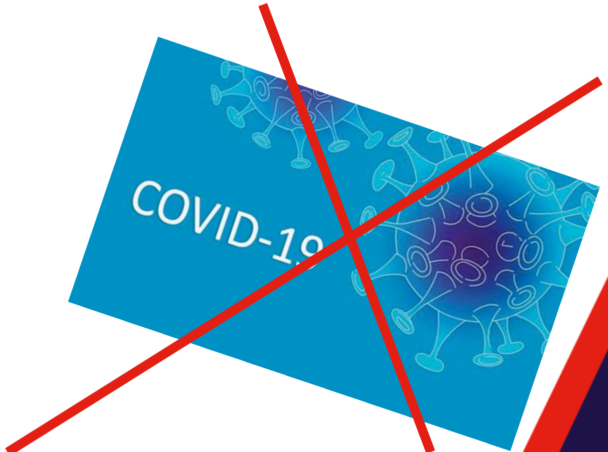
https://www.facebook.com/pg/MeatTheUKExporters

Calendar of activities

- July, 4th – US Independence Day/National Barbecue Day
- July, 13th – National French Fry Day
- August – National Sandwich Month
- August, 1st – National Mustard Day
- August, 20th – National Bacon Day – Pork Belly

- October – ‘Roast Beef’ Influencers day – To organise some small roasting joints to be delivered to a group of food influencers and invite them to a virtual butchery presentation

- March 2021 - RC Show Toronto
- May 2021 – NRA Show in Chicago/Outward mission UK Exporters
- June 2021 – US Journalist visit to the UK




United States
Baja California
Sonora
Chihuahua
Gulf of California
Baja California Sur
Coahuila
Nuevo
León
Tamaulipas
Sinaloa
Durango
Gulf of Mexico
Pacific Ocean
Zacatecas
San Luis
Potosí
Aguasca-
lientes
Nayarit
Guanajuato
Querétaro
Hidalgo
Jalisco
México
Tlaxcala
Veracruz
Puebla
Morelos
Colima
Michoacán
Guerrero
Oaxaca
Tabasco
Chiapas
Yucatán
Quintana
Roo
Campeche
Belize
Caribbean Sea
Guatemala
Honduras
Pacific Ocean
№A2808190066
Mexico
Kilometers
0 150 300 450
0 100 200 300
Ontheworldmap.com

Superama

Walmart
México y Centroamérica

CHEDRAUI

Soriana

Table 6.5. Wholesale and retail establishments, related to the distribution and marketing of meats, 2015

Number of establishments

State	Wholesale	%	Retail	%	Supermarkets	%	Grocery	%
Aguascalientes	26	2.20%	696	1.00%	66	1.10%	5427	0.90%
Baja California	39	3.20%	314	0.50%	374	6.20%	12 947	2.10%
Baja California Sur	18	1.50%	136	0.20%	85	1.40%	2 836	0.50%
Campeche	14	1.20%	627	0.90%	49	0.80%	5 428	0.90%
Coahuila	42	3.50%	877	1.30%	243	4.00%	14 544	2.30%
Colima	9	0.70%	482	0.70%	48	0.80%	3 571	0.60%
Chiapas	20	1.70%	2 961	4.40%	115	1.90%	32 575	5.20%
Chihuahua	58	4.80%	752	1.10%	238	3.90%	14 415	2.30%
Mexico City	137	11.30%	6 418	9.60%	453	7.50%	41 772	6.60%
Durango	16	1.30%	818	1.20%	68	1.10%	7 633	1.20%
Guanajuato	78	6.50%	3 721	5.50%	218	3.60%	31 380	5.00%
Guerrero	14	1.20%	2 015	3.00%	97	1.60%	22 829	3.60%
Hidalgo	11	0.90%	1 516	2.30%	78	1.30%	14 791	2.40%
Jalisco	93	7.70%	5 163	7.70%	370	6.10%	40 286	6.40%
México	116	9.60%	9 543	14.20%	678	11.20%	85 503	13.60%
Michoacán	24	2.00%	3 316	4.90%	159	2.60%	30 247	4.80%
Morelos	10	0.80%	1 536	2.30%	81	1.30%	12 889	2.00%
Nayarit	8	0.70%	691	1.00%	56	0.90%	5 875	0.90%
Nuevo León	122	10.10%	1 199	1.80%	519	8.60%	18 513	2.90%
Oaxaca	6	0.50%	3 100	4.60%	79	1.30%	30,963	4.90%
Puebla	44	3.60%	4 154	6.20%	169	2.80%	44 866	7.10%
Querétaro	20	1.70%	995	1.50%	101	1.70%	7 840	1.20%
Quintana Roo	22	1.80%	705	1.00%	122	2.00%	5 747	0.90%
San Luis Potosí	29	2.40%	1 461	2.20%	106	1.80%	13 165	2.10%
Sinaloa	51	4.20%	876	1.30%	319	5.30%	13 727	2.20%
Sonora	67	5.50%	540	0.80%	340	5.60%	12 084	1.90%
Tabasco	15	1.20%	1 546	2.30%	91	1.50%	8 487	1.30%
Tamaulipas	41	3.40%	1359	2.00%	225	3.70%	15 535	2.50%
Tlaxcala	2	0.20%	1 097	1.60%	27	0.40%	11 624	1.80%
Veracruz	35	2.90%	5 588	8.30%	288	4.80%	41 328	6.60%
Yucatán	17	1.40%	1 911	2.80%	126	2.10%	11 708	1.90%
Zacatecas	4	0.30%	1 033	1.50%	49	0.80%	8 412	1.30%
Total	1 208		67 146		6 037		628 947	

National Conference for Pig Producers

Expo ANTAD & Alimentaria México

GREAT YORKSHIRE SHOW

THANK YOU

Susana Morris

Senior Export Manager – North America

Thursday, 2 July

susana.morris@ahdb.org.uk

@SusanaMorris_

Webinar

Question & Answer Session

THANK YOU FOR JOINING US TODAY

AHDB

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FOOD IS GREAT
BRITAIN & NORTHERN IRELAND