



QUALITY MEAT
from Britain

BRITISH RED MEAT EXPORTS CONFERENCE

13 June 2024

Butcher's Hall, Farringdon

PROUD
TO SUPPORT



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Session 1: Ambition for Export

What has been achieved?

Review of 2023, key wins, progress made with the Beyond the Border strategy and what's next.

Nicholas Saphir, Chair of AHDB

Introduction to Richard Hampton

International Trade Development Director

What are we working with?

Global markets and trade trends

Tom Dracup

Lead Analyst (Red Meat) AHDB



Global Factors

- **Conflict**
- **Political Uncertainty**
- **Volatile Markets**



Opportunities

- **Market Movements**
- **Developing markets**
- **The Drive for Quality and Provenance**

Disruptors?



- Logistics
- Disease Risk
- Production Volatility
- Regulatory landscape

Global market – Production Picture (2024 estimates)

EU/UK producer prices supported, with tighter supply across red meat proteins

US:

- Beef production ↓ 2%
- Pigmeat production ↑ 3%
- Low beef inventory

EU:

- Beef production ↓ 2.3%
- Pigmeat production ↓ 0.4%
- Sheep meat ↓ 4.9%

China:

- Pigmeat production ↓ 3%
- Beef production ↑ 2%
- Subdued economic recovery, high inventories

Brazil:

- Beef production ↑ 2%
- Pigmeat production ↑ 4%

Australia:

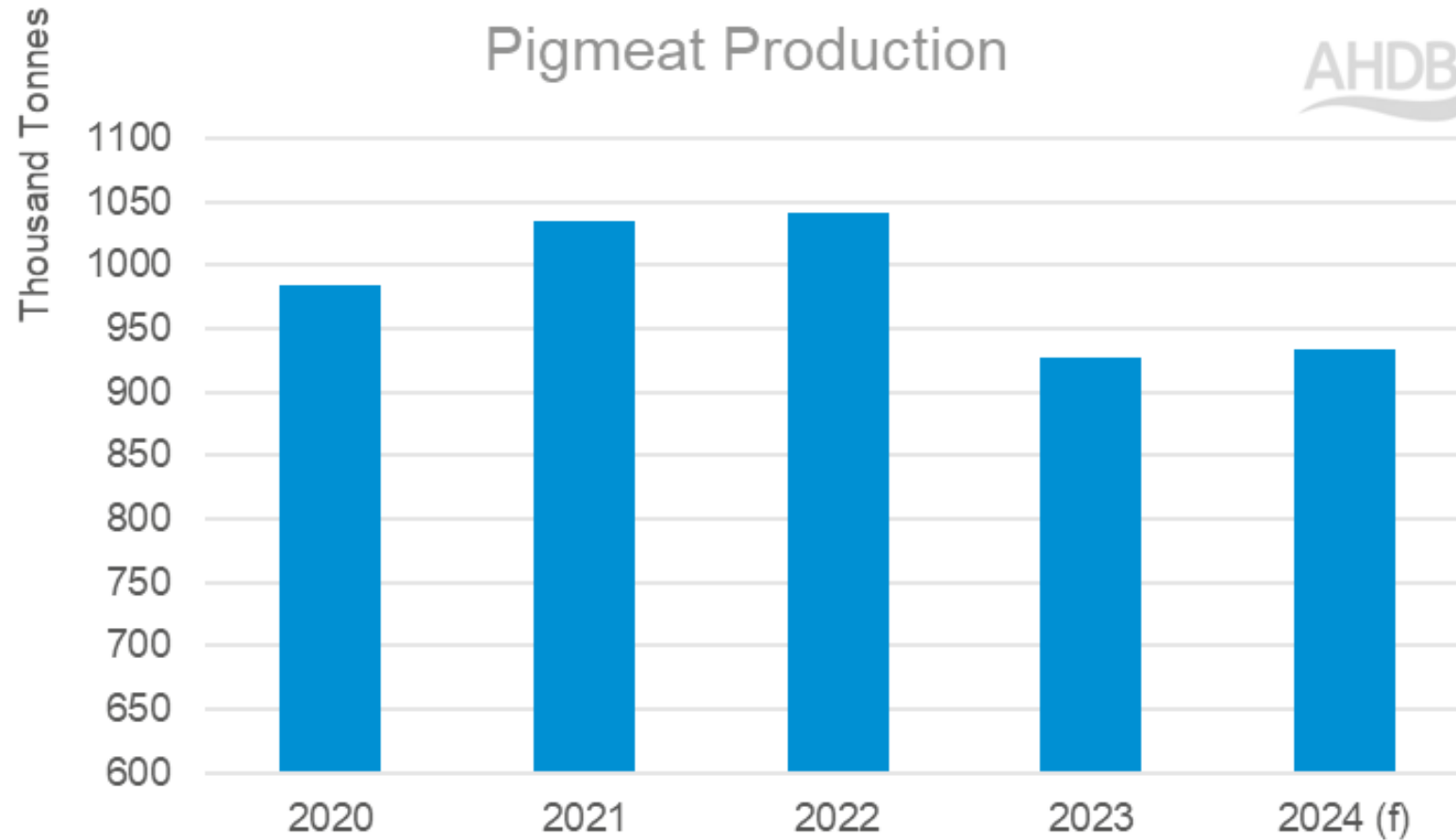
- 2024 Beef production ↑ 11%
- 2024 Sheep meat Production ↑ 3.5%

Southern hem, producer prices eased with higher production and weaker Chinese demand

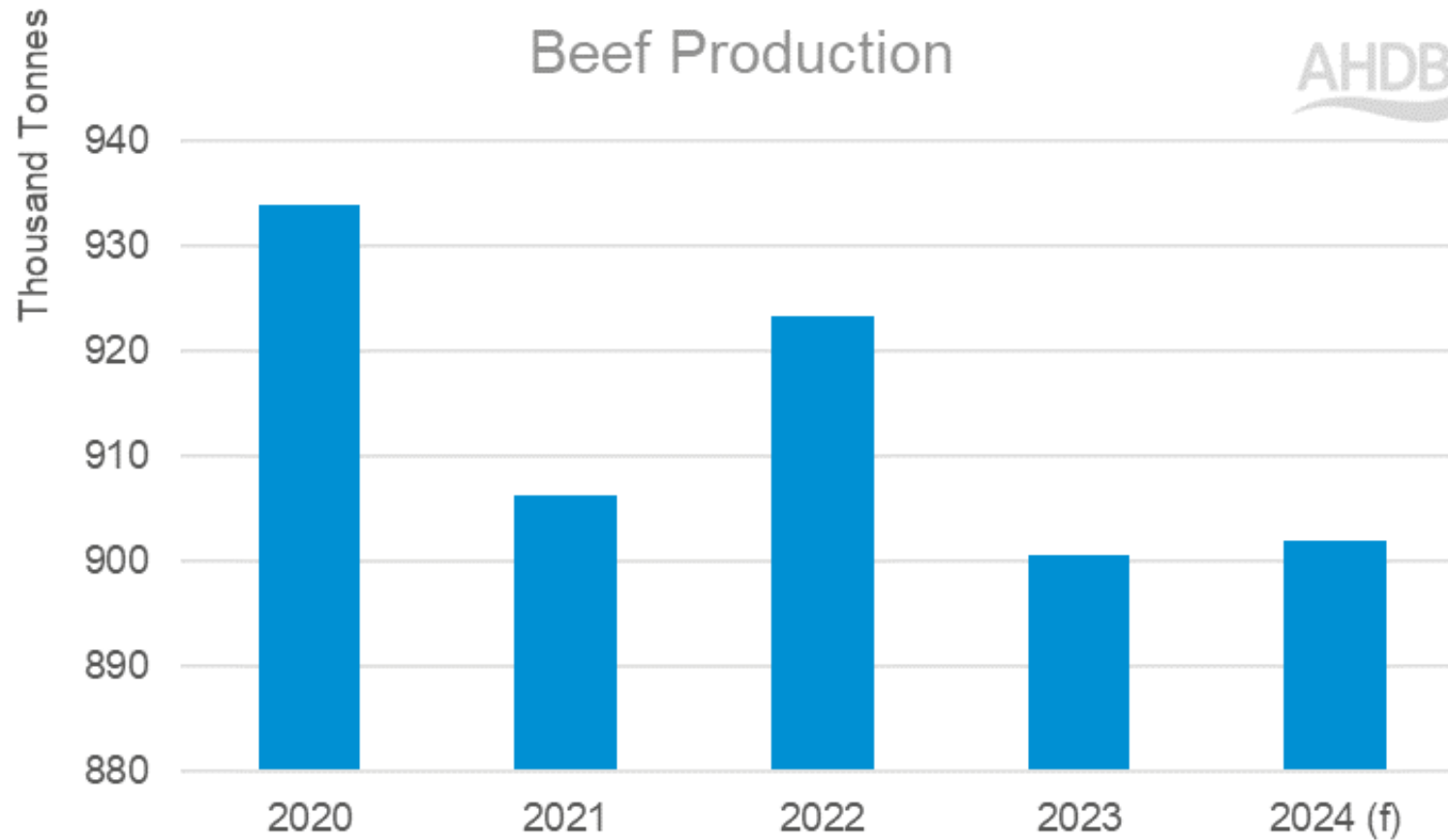
UK market focus



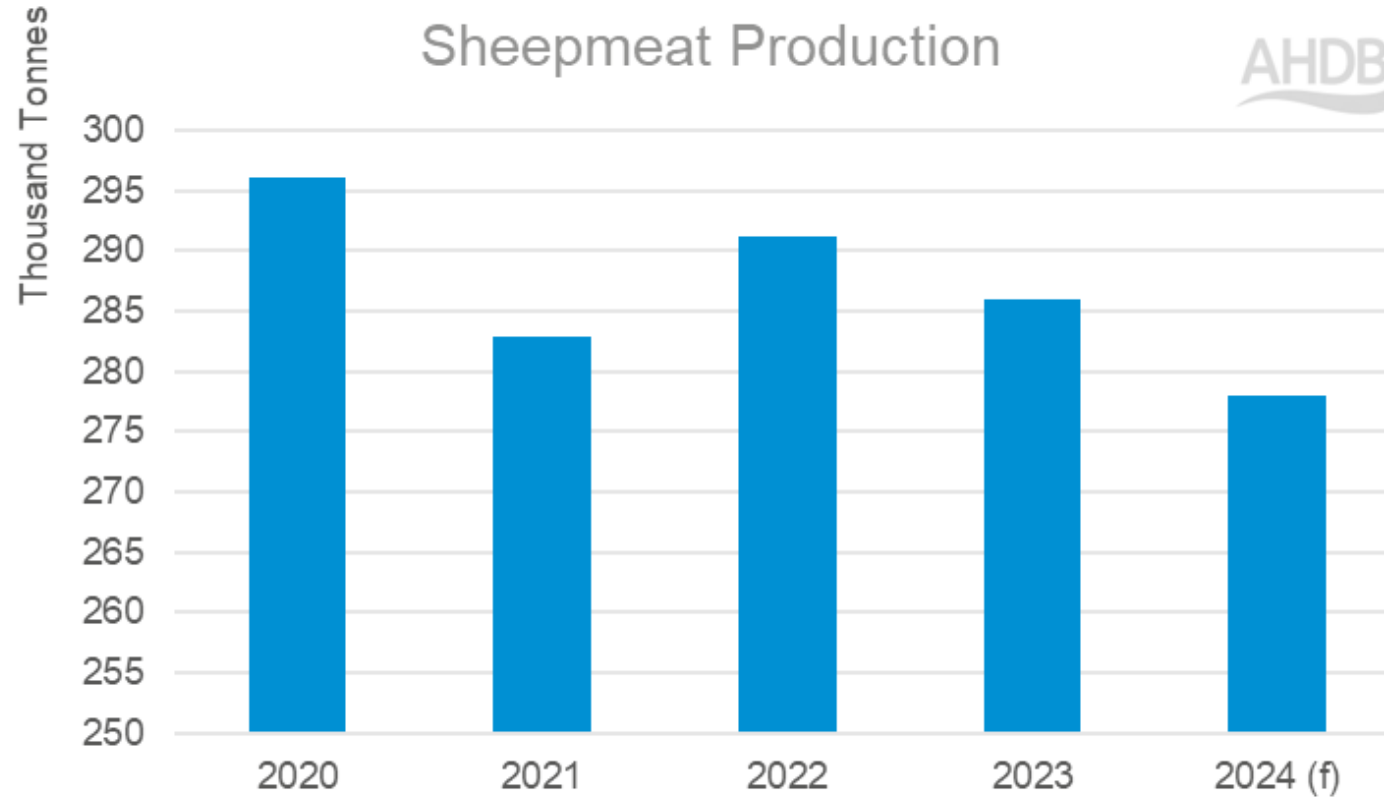
Pigmeat Production (Calendar Year)



Beef Production (Calendar Year)



Sheep Production (Calendar Year)





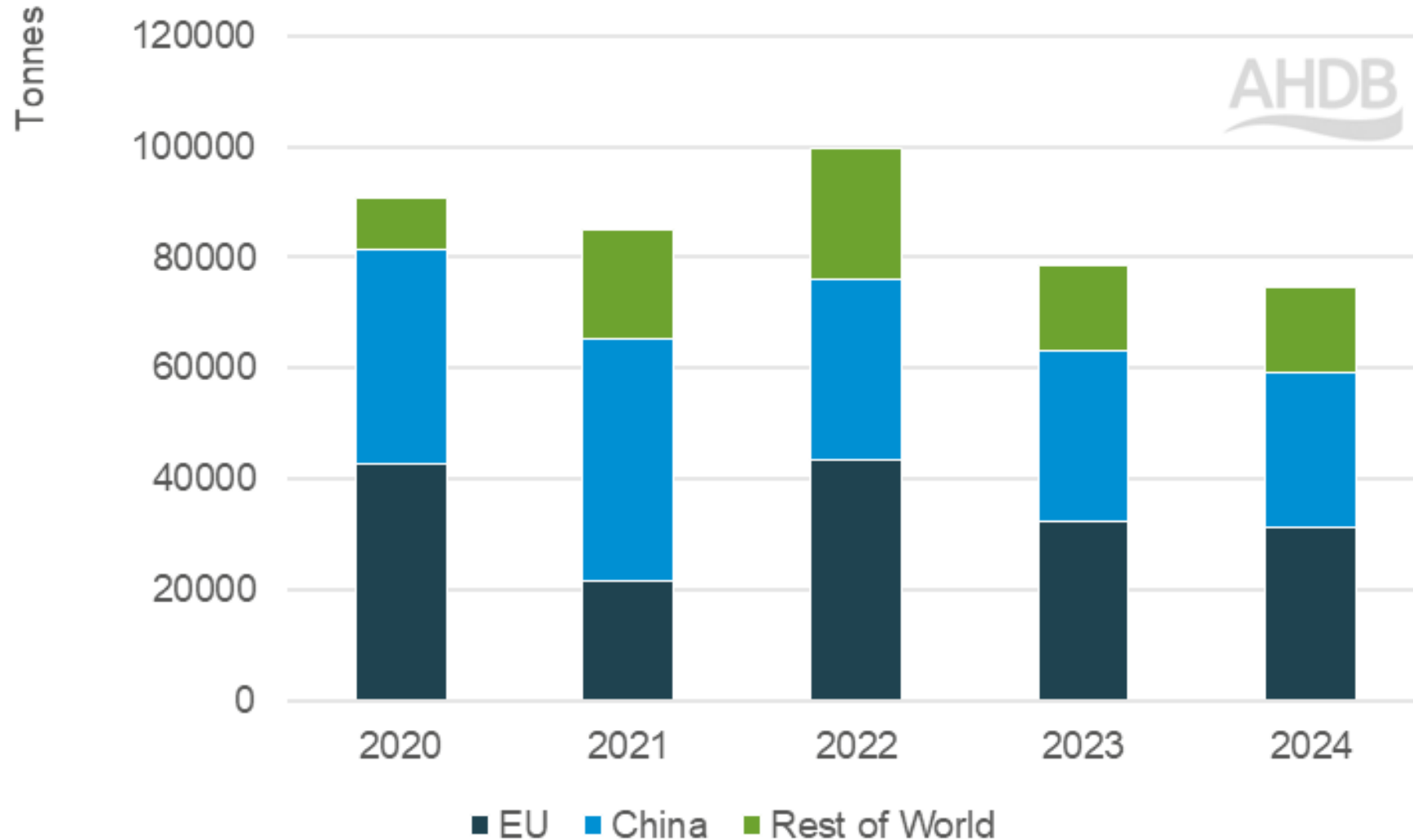
Supply base conclusion

- Tight domestic supply
- Medium term trends
 - Wider than UK

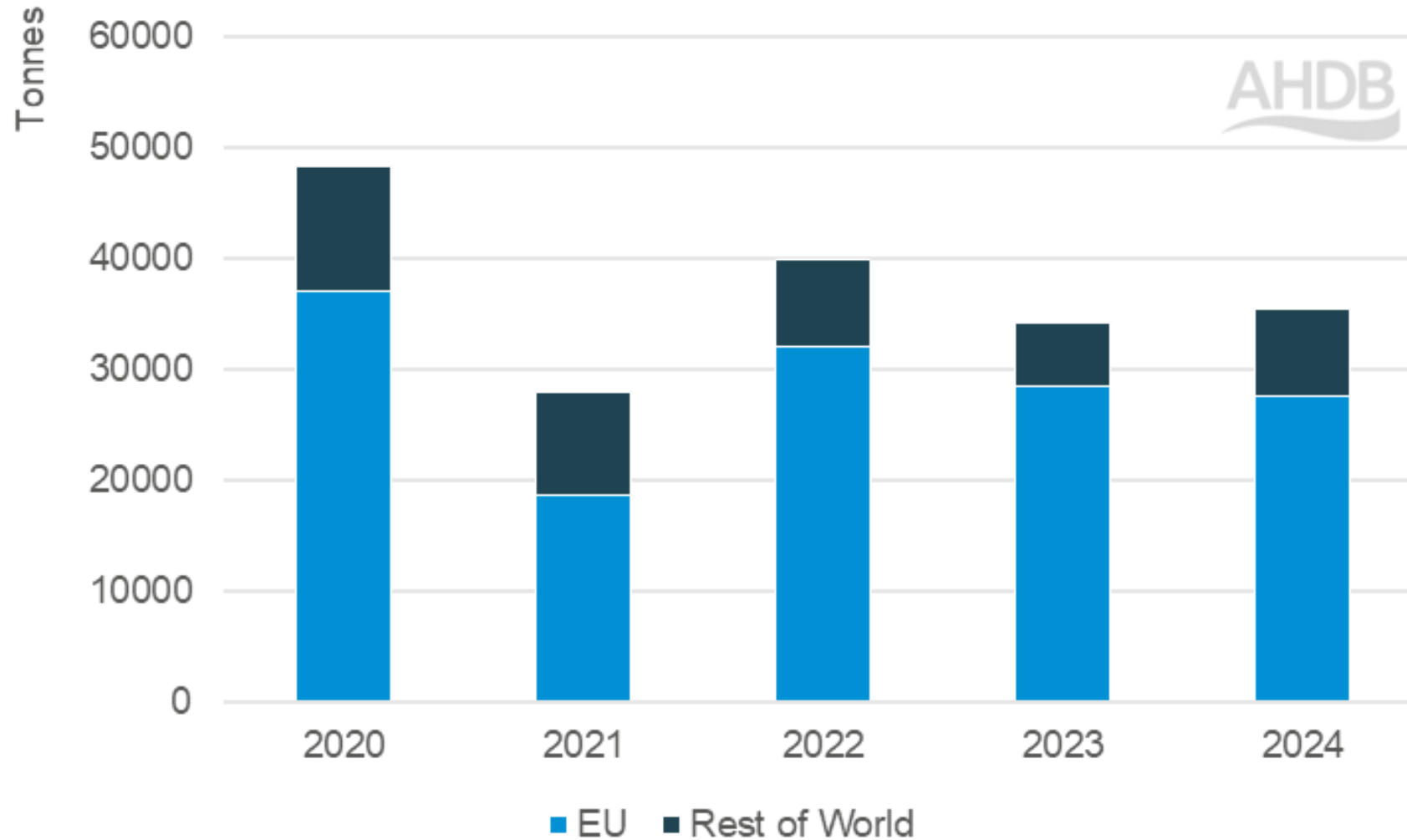
Export performance



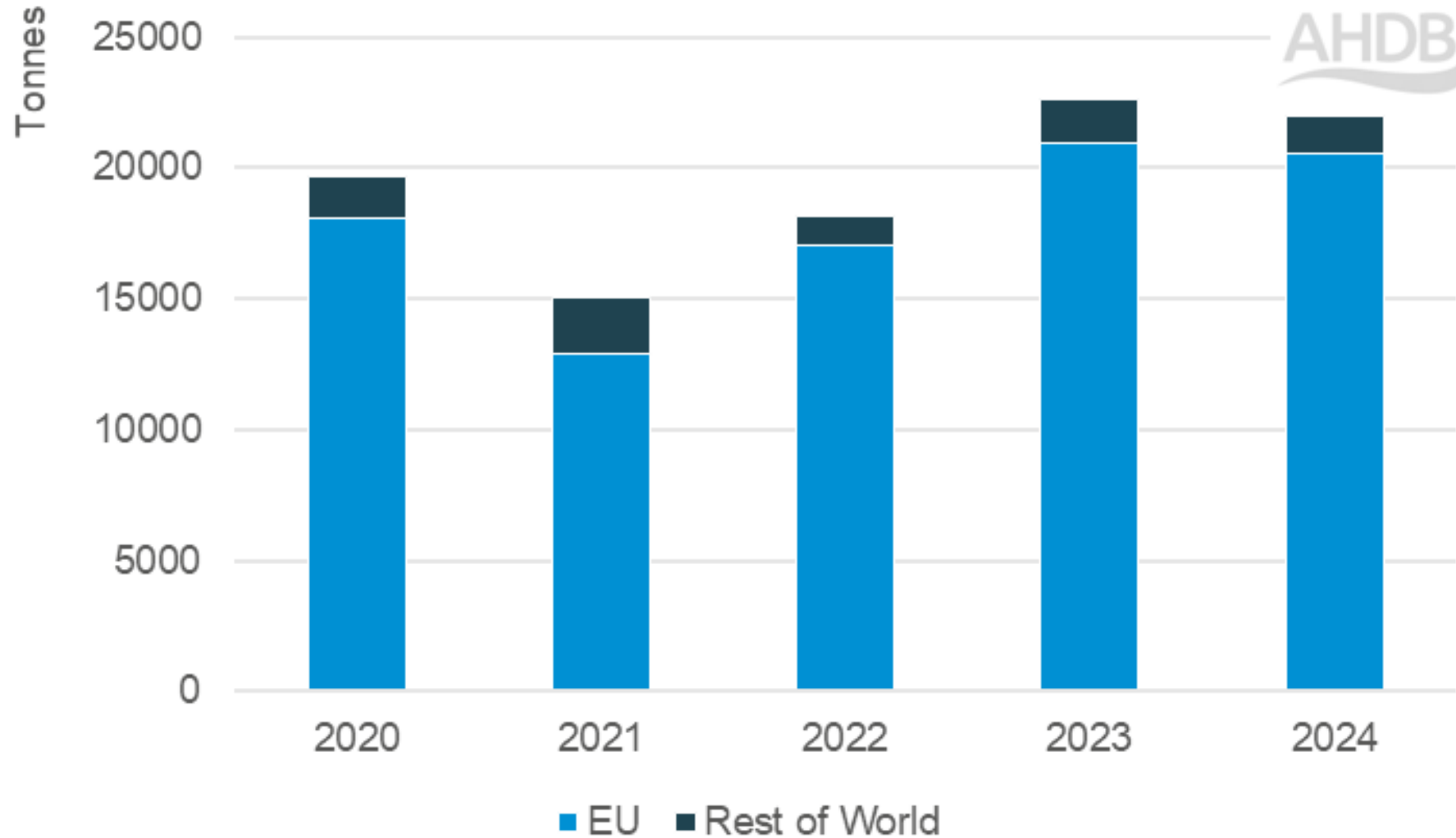
UK Pigmeat Exports – Year to Date Volume



UK Beef Exports – Year to Date Volume



UK Sheepmeat Exports – Year to Date Volume





The year ahead

Global Red Meat Markets

- EU

Challenges

- Tight domestic supply
- High Prices

The Focus

- Capitalise on Opportunity
- Carcase Balance

Where next?

Market Access Update

Ouafa Doxon

Senior Market Access Manager, AHDB

Content

- Markets update
- Export Knowledge Hub

Markets update

Value of market access

- Overall objective of market access:
 - Support the opening of a new market
 - Improving and maintaining access to existing markets
- The value of market access work
 - Crucial role in carcass balance
 - Financial value across down the supply chain

Market Access Prioritisation - 2023

The report gives the rationale and an overview of nine key country markets in which we are currently focusing our market access activities.



Asia



China



- CIFER 2023/2024 exercise
- New approval/name change



- Working towards including more pork commodities
- Progress assessment on UK lamb



- Beef remains a priority despite BSE ban and Bluetongue Virus bans



Vietnam



- Access granted/listing in progress
- Estimated value over 5 years £12M



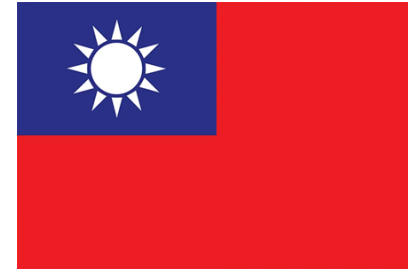
- Risk assessments submitted in 2017
- To re-open discussions on beef



- Next priority lamb



Taiwan



- Access granted
- Estimated value over the next 5 years £25M



- Disease free status risk assessments



- Beef import risk assessment data submitted



Americas



Mexico



- Muscle meat, offal and edible by products
- Estimated value over the next 5 years £18M



- Audit visit carried out (May-June)
- Maintain access/ more sites listed.



- Next priority lamb



USA



- Lamb access (2022)
- Estimated value over the next 5 years £37M



- Exploring wider scope to include head meat (beef)



Canada



- Sheep/beef/ pig access



- Multi species Food System audit visit



Where next?



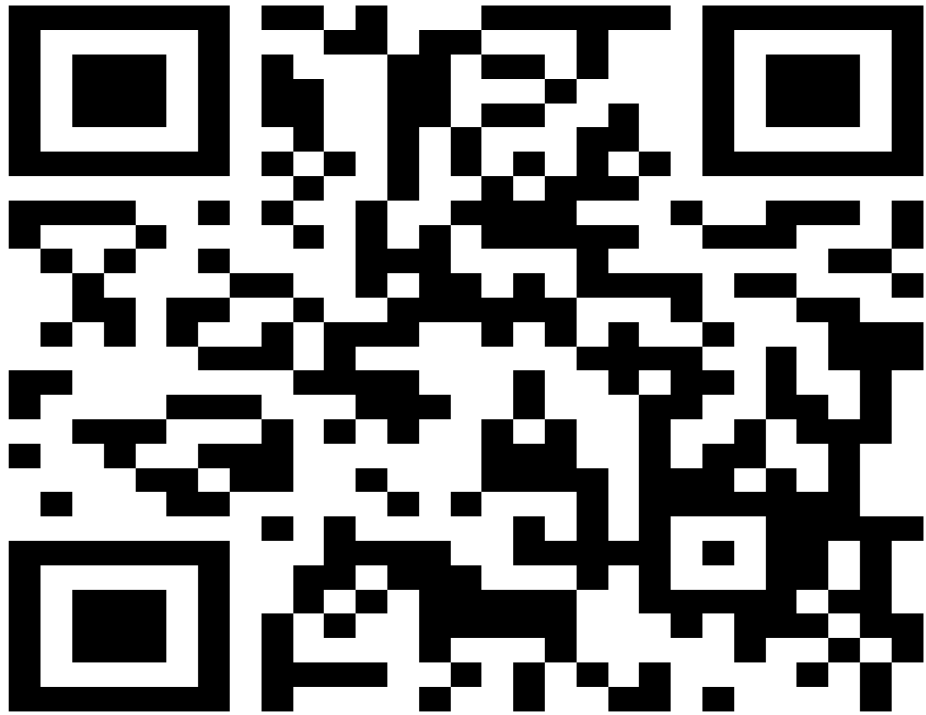
Welcome to the AHDB Export Knowledge Hub



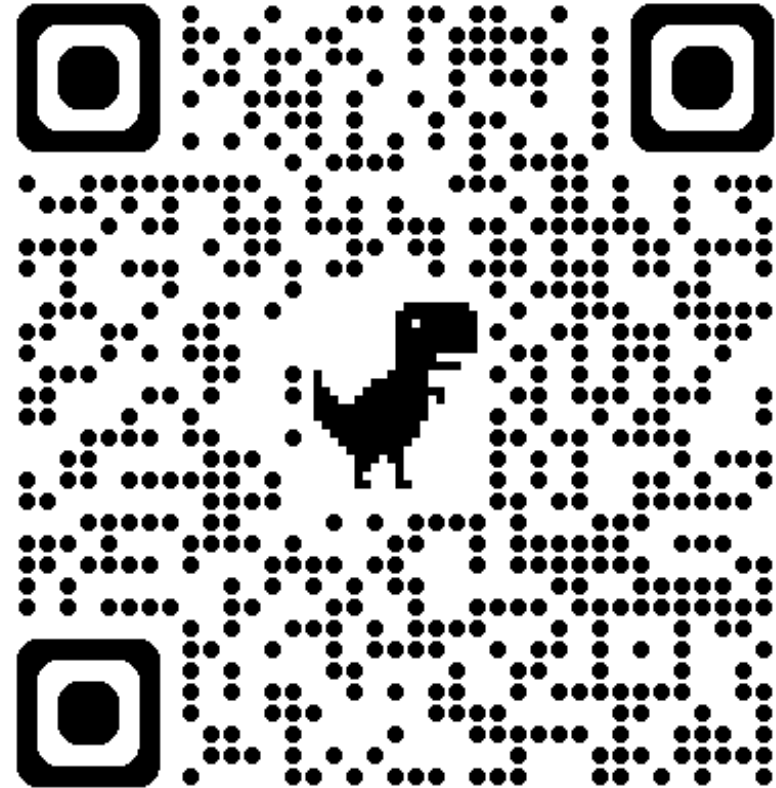
*Working to increase access to new overseas markets
and opportunities for UK producers.*

Next steps

- Export survey



- Export Knowledge Hub registration



A brand strategy for Europe

Gareth Renowden

Head of International Marketing, AHDB

Introduction

QUALITY
MEAT
from Britain



Brand strategy



Brand hierarchy



Key messaging

Produced to world-class food and farming standards



Grass fed

Grass makes up 90% of the feed needed for British cows and sheep to prosper



Outdoor reared

Due to the Britain's climate and landscape, red meat production systems are primarily outdoor



Sustainable

Red meat from the Britain is among the most sustainable in the world

Target audience

Wholesalers

Importers

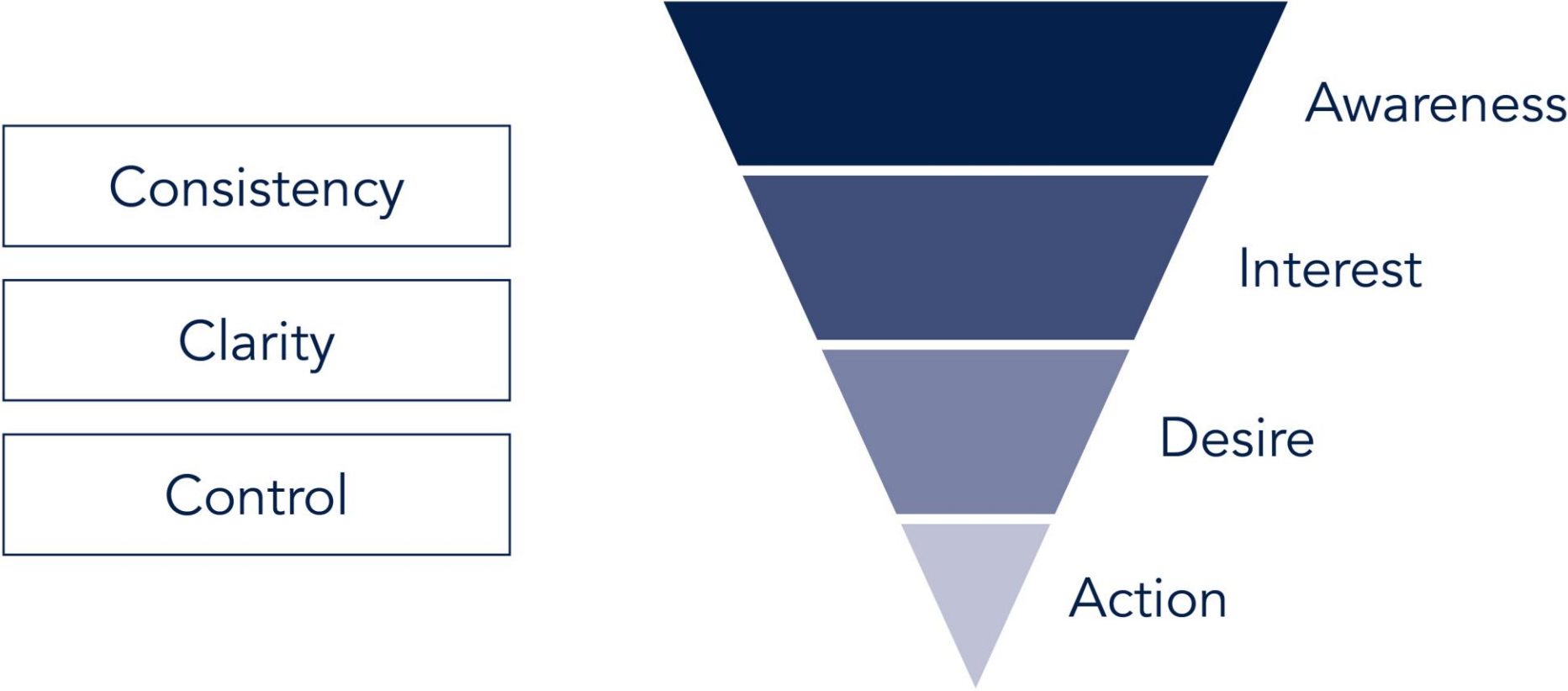
Chefs

Butchers

QUALITY
MEAT
from Britain 



Benefits of the new brand strategy



Launch timeline



Brand visuals



GREAT Blue
 C 100 M 76 Y 0 K 64
 R 4 G 4 B 63
 Pantone 2768C
 # 04043F

GREAT Red M 92 Y 100 K 0 R 235 G 0 B 0 Pantone 485 # EB0000	White R 255 G 255 B 255 # FFFFFFFF	AHDB Text K 80 R 87 G 87 B 86 # 575756
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Title text style

Body text style (1920x1080px template). Use **Avenir Black** to emphasise key words (if required)

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Session 2: What could hinder and help UK meat exports?

Discussion of disease threats with the Chief Veterinary Officer

Dr Christine Middlemiss, UK CVO

Angela Christison, Director for Strategic
Development, AHDB

What is the Food and Drink Export council doing to promote UK products including red meat?

Margaret Boanas

Deputy Chair Food & Drink Export Council



Session 3: Global Trade – Market Liberalisation & Trade Dynamics

Growth in the Halal Sector

Dr Awal Fuseini

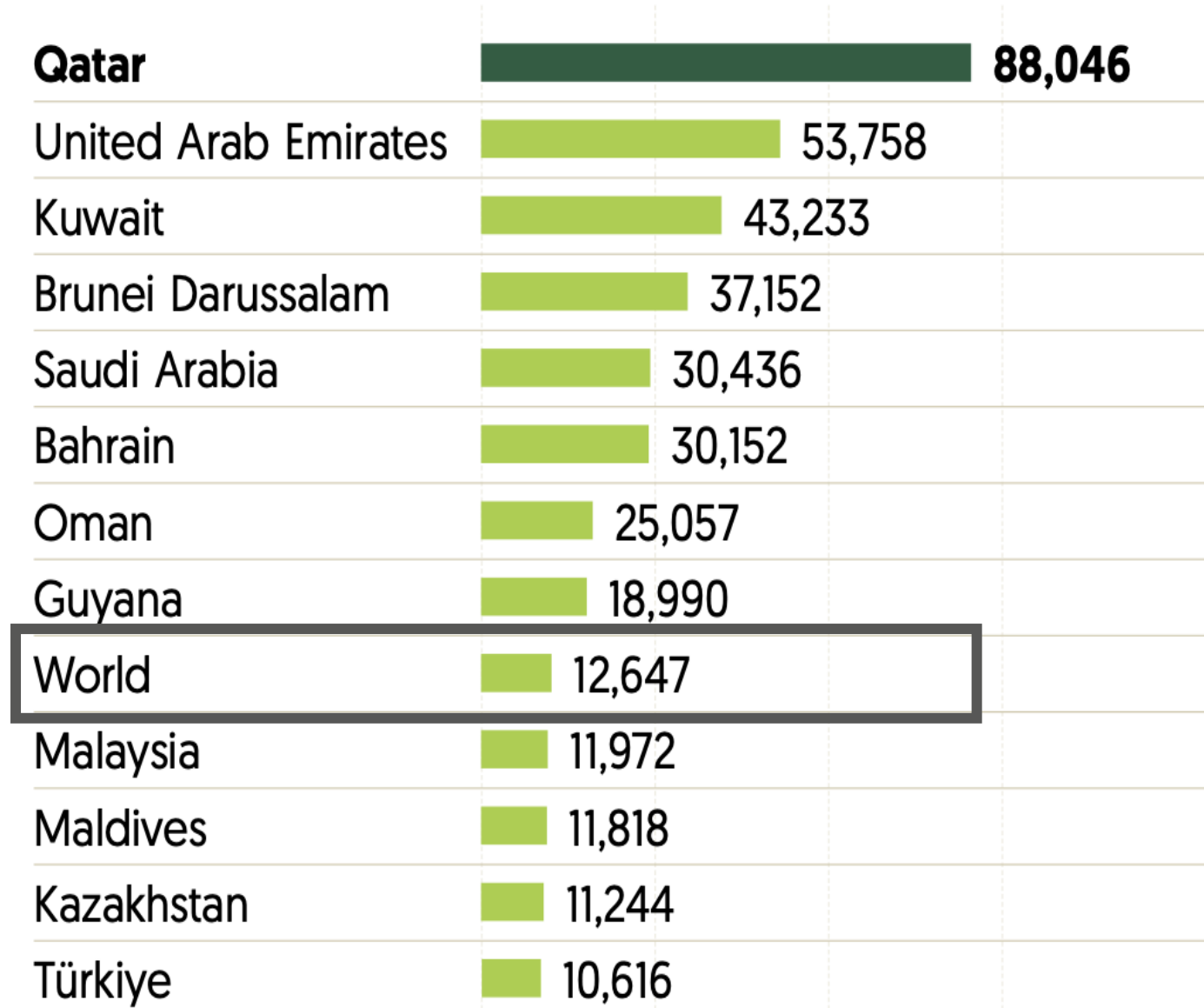
Senior Halal Manager, AHDB

The global Halal market at a glance

- Muslim population of 2 billion, relatively young with a high disposable income
- The global Islamic economy expanded from USD1.62 trillion in 2012 to USD2.29 trillion in 2022
- Spend on Halal food reached USD1.4 trillion in 2022
- Meat forms an important part of Muslim lifestyles

GDP PER CAPITA, CURRENT PRICES

US\$ (2022)



Key Halal markets



The domestic (UK) market

The EU market

The Middle East market

Value comparison per tonne Sheep meat (fresh)

Global £6,635.46

Kuwait £8,764.64

Saudi £12,213.17

UAE £19,315.17

Qatar £20,769.26



What the consumer is prepared to pay in Dubai



What about volume outside the EU?

Kuwait is the largest market by volume outside the EU for **fresh sheep meat** (838 tonnes)

Ghana is the largest market for **frozen sheep** meat by volume (1,092 tonnes) outside the EU



The future looks bright for this sector!

We were in Dubai in February for Gulfood

We were also in Riyadh last month for the Saudi Food Show

In early June, we interacted with buyers in Jordan

Join us in Senegal in September

And don't forget South Africa WC 30th September



Let's not forget the market at our doorstep

A population of 3.9 million accounting for a market value of £1.7 billion

Domestic Muslim population eat and spend more on meat than the general population

All major processors now process Halal meat

All major supermarkets now sell Halal meat

The festivals present enormous opportunities. The next one is on the 16th of June!



And always remember this: we are here for you!



Thank you

Awal Fuseini

Awal.Fuseini@ahdb.org.uk



Regional/Species review

Chair: John Bates, Senior Media Relations Manager

Panel:

Jonathan Eckley, Head of International Trade Development

Susana Morris, Senior Trade Development Manager

Lucille Brillaud, Marketing and Communications Manager

In the year of the Dragon, how will China perform?

Mr CHEN Wei

President, China Meat Association

The Final word...from Graham Wilkinson, AHDB's CEO



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