



Export Conference June 2023

# Market Access Update

Ouafa Daxon

Market Access Manager

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## Contents

### Market update

- Market Access prioritisation
- Asia
- Americas
- Caribbean
- Next

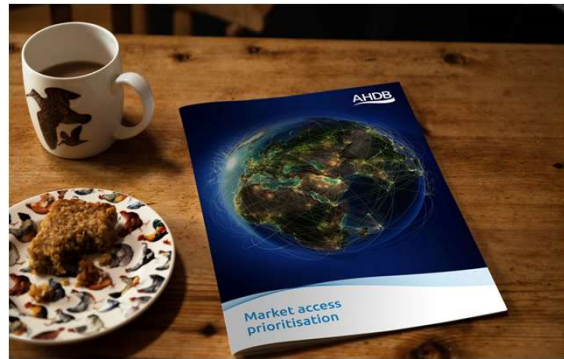
### Export training offer

- Export Training Offer
- Pillars
- Ownership

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# Market Access Prioritisation

Our evidence-based market access prioritisation informs the direction of travel of our market access activities.



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## CHINA



Pork, lamb and beef



Work dominated by CIFER and re-listing  
New approvals

Scope to improve export health  
certificate (incl. casing)










To progress UK lamb and secure an  
inward mission 2023/24 (tbc)

Beef remains priority despite BSE ban

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## VIETNAM







-  Pork and beef
-  Scope of export health certificate agreed
-  UK pork applications submitted
-  Readiness to export late summer
-  Beef is our next priority


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## TAIWAN







-  Lamb and beef
- Audit in September 2022
-  Agreed scope of export health certificate
- Listing of sites is imminent
- Readiness to trade by late summer
-  Beef risk assessment with a mission in 2024 (tbc)
- Disease free status risk assessments


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**SOUTH KOREA** 






-  Pork, beef and lamb
-  Pork audit for ongoing approval  
Audit in September 2022 (beef)
-  Maintain access for pork  
To secure beef access before moving to lamb

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**USA** 



-  Lamb, beef
-  Access lamb market  
Increase number of lamb/beef exporters
-  Improve lamb and beef access

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## MEXICO




-  Pork – offal and edible by products
-  Scope of the new export health certificate agreed
-  Remote audit before the end of 2023
-  Readiness to export early 2024 (tbc)  
More sites listed
-  Lamb and beef next

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## CHILE







-  Pork, offal and edible by products
-  New export health certificate to mention offal
-  Revised listing of exporters to include offal
-  Next step is listing sites for beef export

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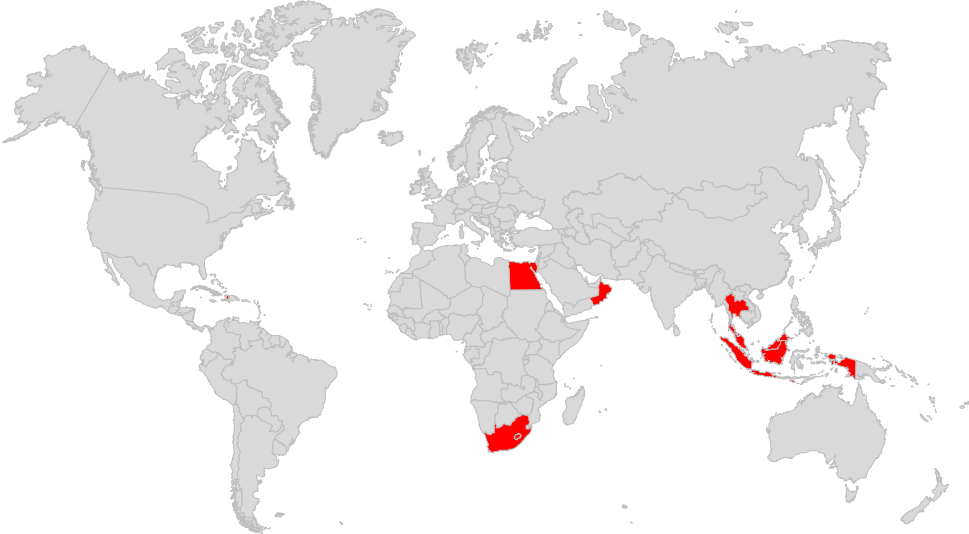

# CARIBBEAN



-  Pork, beef and lamb
-  Export health certificate for Jamaica and other islands in progress
-  To host an inward mission  
Secure access for 2024

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# Where next?



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## Export training offer



To drive export



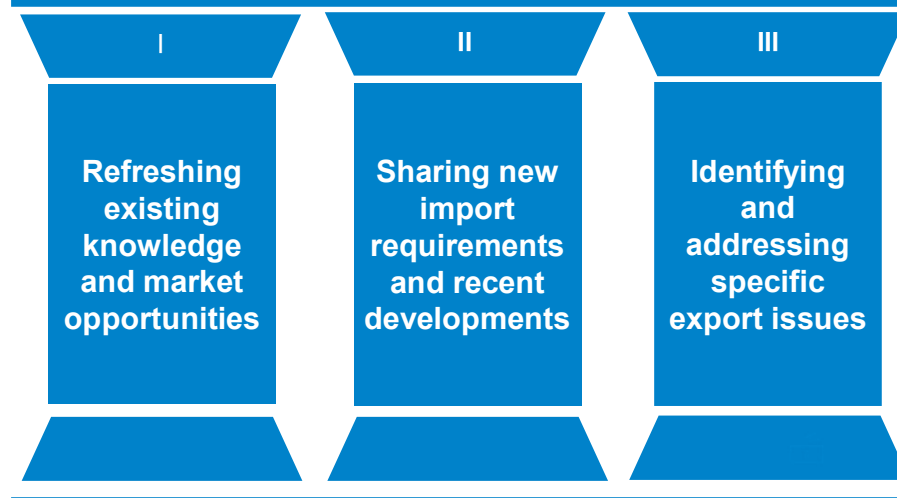
To protect the reputation of UK agriculture



To maximize global opportunities

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### Export Training Offer



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## Ownership



The training program starts with you



It must meet the needs of exporters



Next - survey to identify your training needs

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## Halal Opportunities

Awal Fuseini

Halal Sector Senior Manager

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## Halal Opportunities

Sheep meat, beef and 5<sup>th</sup> quarter

EU, MENA, Asia, the Americas, SSA.

Strong Muslim population, limited production and growing middle class



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## AHDB's activities in the sector

Inward and outward trade missions

Trade Shows

Market access, intelligence and maintenance

Contribution to free trade agreements



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## Demonstration of Life and challenges for Halal beef



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# AHDB Trade Policy Analysis

Sarah Baker

Head of Economics – Analysis

[Sarah.Baker@ahdb.org.uk](mailto:Sarah.Baker@ahdb.org.uk)

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# Horizon - International Trade Policy Analysis reviews opportunities across the globe



Examples of Insight delivered out to the industry

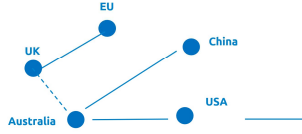
- Analysis on agricultural policies across the devolved nations
- Analysis of Trade Agreements and implications of WTO for UK agriculture

With AHDB expert analysis across a range of data sources



### Trade Network Model

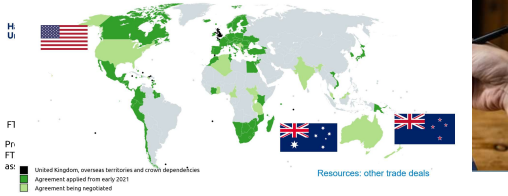
Understanding the impact of trade deals for agri-food.



Only quantitative modelling available providing data on changes to trade flows and prices at farmgate, wholesale and retail.

### Trade deal impact analysis

Studies have been conducted on 3 major markets with further work planned.

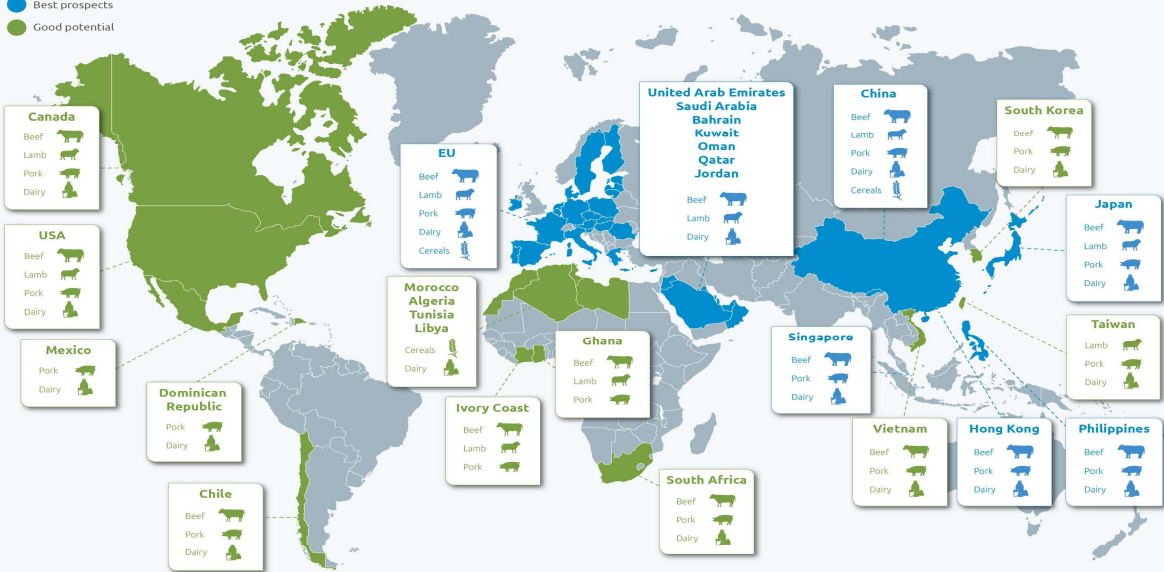


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## Prospects for UK agri-food exports



- Best prospects
- Good potential



This map highlights the best opportunities for UK agri-food exports according to our 2023 analysis. It is not comprehensive. If a region is shown in grey, it does not imply that opportunities do not exist there.

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# International Consumer Insight

Steven Evans

Lead Consumer Insight Manager

Steven.Evans@ahdb.org.uk

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## AHDB International Consumer Insight

### What we do

AHDB's Retail and Consumer Insight team looks at International consumer behaviour in key export markets.

*We use this to support growth in our industries by:*

- Providing a better understanding of how consumers shop
- Helping levy payers understand their final customers needs
- Working with AHDB Exports on strategic consumer opportunities for exporters.



### Market experts providing unique analysis to the market

#### Examples of AHDB Subscription and data services

Euromonitor  
IGD  
AHDB Bespoke International Research - TwoEarsOneMouth

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## Identifying Market Potential

**AHDB**

Together with horizon-scanning exercises and a unique relationship with industry, the Market Intelligence team allows AHDB to identify emerging and priority markets.

**Elements which makes up monitoring and evaluating market potential**

Unpicking market potential and future opportunities

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## Providing Insight around Consumers in International Markets

**AHDB**

Some additional importance factors come through by market

QUALITY

TASTE

PRICE / VALUE

FR

\* Origin of product

DE, NL, SE, DK, FI, NO, PL

\* Animal welfare

PL

\* Use by date, appearance & health

International Consumer Horizon reports & Country Focus Reports

Bespoke Research – Meat Buying Behaviour 2021-2023 across 4 regions

Insight articles reviewing consumers in key export markets

<https://ahdb.org.uk/international-consumer-insight>

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**AHDB**

## Global Consumer Considerations

- Amplify** Quality credentials as the consistent foundation of Global messages
- Drive** quality across all regions through showcasing delicious looking product (taste and tenderness/texture, appealing product appearance cues and **reinforce freshness where possible**)
- Address** price/value perceptions by ensuring that all communication seeks to justify any price premium
- Support** with messages amplifying Production Standards (rooted consumer desires around Food Safety in S.E. Asia, Naturalness in North America and Halal Assurance within the Middle East)
- Reassure** on freshness perceptions in North America and S.E. Asia – something that is perceived to be more likely to be a feature of locally produced meat around Food Safety, especially in S.E. Asia



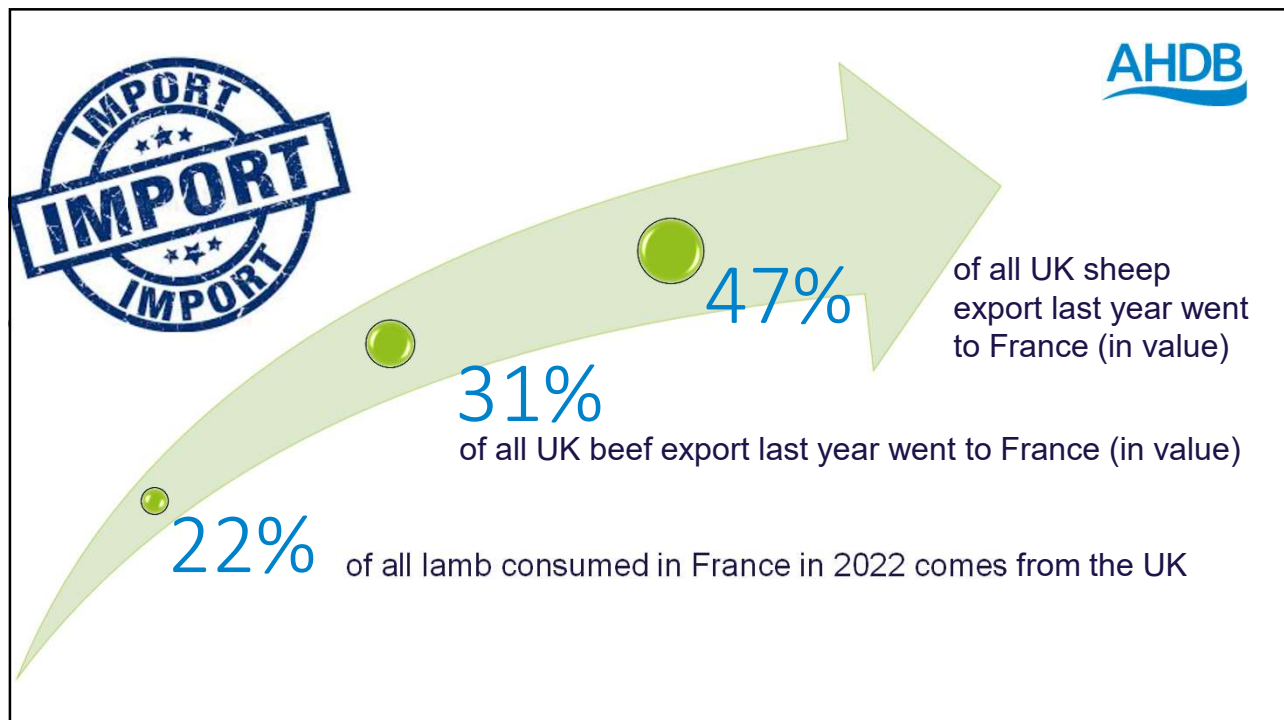
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# France- Market developments and opportunities

Lucille Brillaud

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## THE STORY

OUR AIM IS TO SUPPORT THE SALES OF UK BEEF & LAMB IN FRANCE



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## OBJECTIVE

To support the sales of beef in France

EXPORTERS


IMPORTERS

WHOLESALERS


RETAILERS

FOOD SERVICE


GENERAL FRENCH PUBLIC




DIGITAL COMMUNICATION - B2B & B2C



B2B EVENTS



MARKET RESEARCH



SHOWS : SIHRA/ SIAL

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## What's coming up

Digital exports hub

Develop links with importers

Customer research to adapt the message



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# Belgium- Market developments and opportunities

Carole Daems

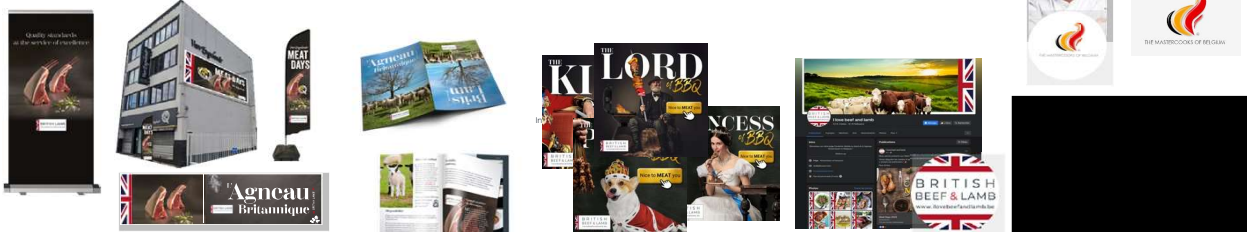
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## Success stories



AHDB - Representation of British Meat In Belgium.  
Brand awareness and visibility - Media campaigns



Parole de chef

### New Campaign

#### Targets:

HORECA sector,  
Wholesaler and  
buyer. Consumers.

#### Objective:

Brand awareness  
and visibility.  
Education of targets  
towards animal  
welfare. health.

#### Realization:

PR representation: congress.  
events. meeting. visibility  
supports. Media campaign  
(GDN, LinkedIn, Influencers):  
creation of videos & images.  
collaboration with Mastercook.

#### Team:

Senior account, creative and  
designers, programmers,  
copywriters, and translators.

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## Some Report 2022-2023



### Facebook page I love beef and lamb

- **3 posts per week** in average (best posts amplified with Meta Ads)
- **New posts identity** launched in 2023 (as seen on right)
- **4200+ followers** (95%+ in Belgium)
- **2250 interactions per month** in average
- **Reaches 27,000 people in Belgium monthly** in average



### YouTube channel I love beef and lamb

- **85 videos** in total, including 15 new videos from our collaboration with the Mastercooks of Belgium over the past year
- **17,000 monthly impressions** in average
- **40 hours of video** viewed per month in average
- More than **6% click-through rate**

### I love beef and lamb website

- **390+ articles** (news, guides and recipes) in French and Dutch in total
- Including **30+ recipes in collaboration** with the **Mastercooks of Belgium**
- **1900 monthly page views** in average



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## SoMe 2023-2024 Plan



### Facebook page I love beef and lamb

- **3 new posts per week** (recipes, news, meat-related tips)
- **Best performing posts pushed** with Meta Ads as usual

### Instagram page Ilovebeefandlamb

- **Launch of the Instagram** page with additional Meta Ad budget and with the help of **influencers campaigns**
- **2-3 new posts every week**

### Ilovebeefandlambwebsite

- **5+ new recipes** and articles published each **month**
- Plan to **redesign the website** (faster and more up-to-date)

### YouTube channel I love beef and lamb

- **12 new videos** with the **Mastercooks of Belgium**
- **Videos** pushed on the **Instagram** and **Facebook** pages

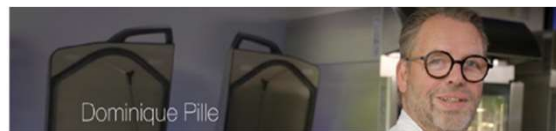
### Top topical Campaign 'BBQ'

- **Google** Display Network
- **SoMe**
- **Linkedin**



### Collaborations

- 12 new recipe videos with the Mastercooks of Belgium to feed the YouTube channel and to show our qualitative meats are being used by great chefs
- 1-2 influencers campaigns to amplify our Instagram and Facebook pages and increase British beef and lamb awareness. 1st campaign: summer BBQ (June 2023)



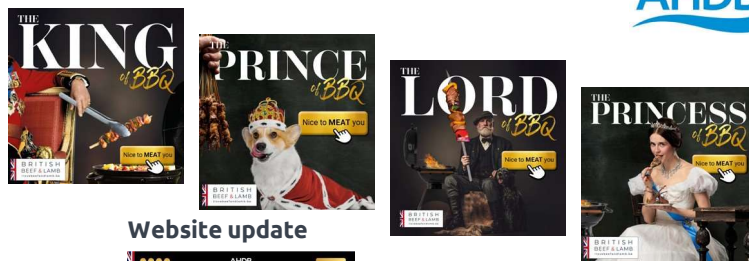
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## What's next...



### Top topical Campaign 'BBQ'

- **Google** Display Network
- **SoMe**
- **Linkedin**



### Website update



Collaborations with **Foodies influencers**



Association with the biggest **wholesalers**



**Educational role** of product traceability and recognition in stores

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What's next...



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# Germany- Market developments and opportunities

Dr. Tim Schäfer

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## Short description of the German market



### General

- Meat consumption per capita is steadily declining (2002 60 kg; 2023 52 Kg)
- Focus of trade is more and more on locally sourced meat
- Appropriate husbandry and sustainability are mandatory for trade
- Strong trend towards meat substitutes

### Lamb

- Degree of self-sufficiency with lamb appr. 50 %
- Lion share of imports from New Zealand
- Seasonal consumption
- Consumption per capita is low appr. 600 g
- Muslim community accounts for a large proportion of lamb consumption

### Beef

- The price is usually important for the purchase decision
- Meat from young bulls and cows is preferred by the trade
- Consumption per capita 8,7 kg
- German and Irish is dominant

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## Objective and target groups



Objective: Improving the image and promoting sales of English red meat in Germany

Target groups:

- Exporter
- Importers
- Retail
- Butcher
- Restaurants/hotels
- Caterer
- Consumers



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## Activities

- B2B Events (tastings, bbq seminars e.g.)
- Cooperation with butcher association (cutting demonstrations, seminars in butcher schools)
- Cooperation with German national butcher team (World Champion at butcher challenge 2022 in Sacramento)
- Shows (ANUGA Cologne, Chefsache Düsseldorf, IGEHO Basel, SÜFFA Stuttgart, Internorga Hamburg)
- Retail (promotional activities in EDEKA stores)
- Events (King Charles visit in Hamburg, New Year reception British Embassy Berlin)
- Mission to UK with German butcher, representatives of trade and journalists
- Digital communication B2B & B2C (website, facebook, youtube)
- Market research



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# The Netherlands - Market developments and opportunities

John Schilder

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## The Dutch market, some characteristics;

### General

- Meat consumption per capita is stable for a few years now
- Quality perception of British/UK is high
- Better Life sustainability label for meat is mandatory for retail

### Lamb

- Seasonal consumption
- Consumption per capita is low
- Mostly out of home, retail is relatively small
- Increase of local sourcing

### Beef

- Cow oriented
- Cheap and red
- Little focus on breeds
- Processing for re-sell to other markets
- Irish is dominant

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## Activities include;



- 350 butchery outlets
- Lamb campaign
- Launch Q3 2023

**Gault & Millau**

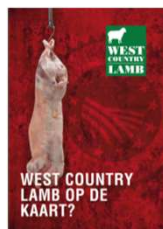
- Partnership
- West Country Lamb award during launch event
- All year round



- Sponsorship
- Attract young people to Horeca
- Social media activities
- Launch Q3 2023

**HORECAVA**

- 61.000 visitors
- Kick of lamb season
- January 2024



- Partnership with importer Meat Street
- All year round

- 18 outlets in NL and BE
- Launch of UK lamb in Q2 2023

**HANOS**  
INTERNATIONALE HORECA GROOTHANDEL

**WE LOVE BEEF**  
**WE LOVE LAMB**

- websites to support UK red meat
- Platform for social media
- Currently updated

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## Direct opportunities;

- Lamb cuts for Keurslagers butcherchain campaign
  - Lean classification (1-2)
  - Fresh weekly delivery allowing volumes to grow
- Single breed matured beef cuts/carcasses
  - Single out breeds when grading
  - Special breeds, e.g. Ruby Red Devon, Short/Long Horn, Belted Galloway
  - Fresh delivery allowing volumes to grow

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# Poland and CEE Region- Market developments and opportunities

Marek Schejbal

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## Background to Planning 2023/24

- The **volatility in supply of British beef and lamb** to Poland & CEE during 2021/2 (**post Brexit/Covid**) impacted considerably on trade:
  - De-listings/loss in retail: Biedronka, Carrefour, Lidl and Auchan in Poland and Albert (Ahold) in Czech Rep.
  - Re-building relations and confidence with customers, many from the beginning
  - With a constant concern that the unpredictability could return
- Makro loss (a major customer 7+ years) : Bord Bia secured business with Metro Group in Germany.
- Regaining some sales through limited in-out promotions: Auchan, Carrefour and Biedronka.
- The **issue** is not price (price pressure with Ukraine), but **continuity of supply**.
- Therefore, the largest importer of British lamb in Poland has invested in cutting/packing equipment for retail packs to **guarantee supply** and underpin **opportunities** for both **beef and lamb**

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## Overview of Marketing Plan 2023/24

- Preparation of new sales **presenter** for Poland and CEE markets with:
  - Lamb and Beef retail packs supplied from Poland
  - Added value meat products ready for distribution
- Researching/re-building **databases of buyers** regionally
- B2B campaign **targeting** buyers with **new product offer** in select markets/regions
- Generating **B2B sales leads** for conversion:
  - Targeted B2B sales campaigns
  - Trade shows and Training events
- Supporting **Retail** and **HoReCa** sales via targeted **promotional campaigns**
- On-going B2B and B2C **social media** activity, **PR** and Trade publicity
- Developing and launching sales of **added-value meat products** to help drive utilisation and volume of primal cuts (subsequently carcasses) imports

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# Trade Shows and Training Events



Participation in B2B international trade show: World Food Poland. 2024 edition TBC



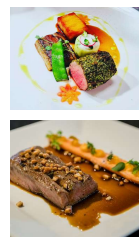
Training video for Chefs/Buyers in cutting & preparation: 9,000+



Participation in HoReCa trade show: EURO Gastro Poland. 2024 edition TBC



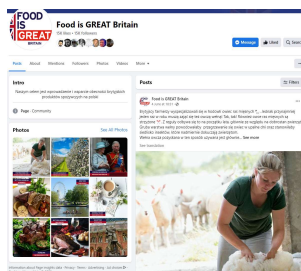
Participation in HoReCa trade event: Restaurant Chefs Congress



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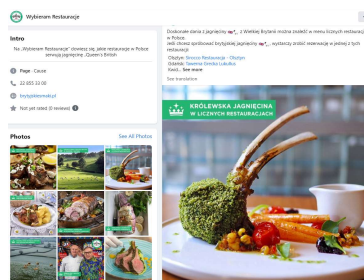
# Social Media



Regular posts on Food is GREAT fan page in Poland with over 15,000 active fans



<https://www.facebook.com/FoodisGREATBritain>



Promotional B2B fan pages on Facebook and Instagram with over 2,500 followers amongst Chefs



<https://www.facebook.com/wyberamrestauracje>

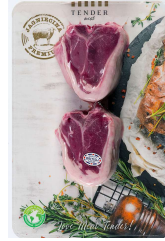
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# Game change: from in-out promotions to listings



*In-out promotions with Carrefour at Biedronka*



*Range of British lamb chops and steaks cut and packed in Poland  
Range of British beef steaks cut and packed in Poland - first time offer*



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# Added-value products with British meat



*Gourmet PIEROGIES – Polish dumplings with Traditional and Exotic fillings using British Lamb*

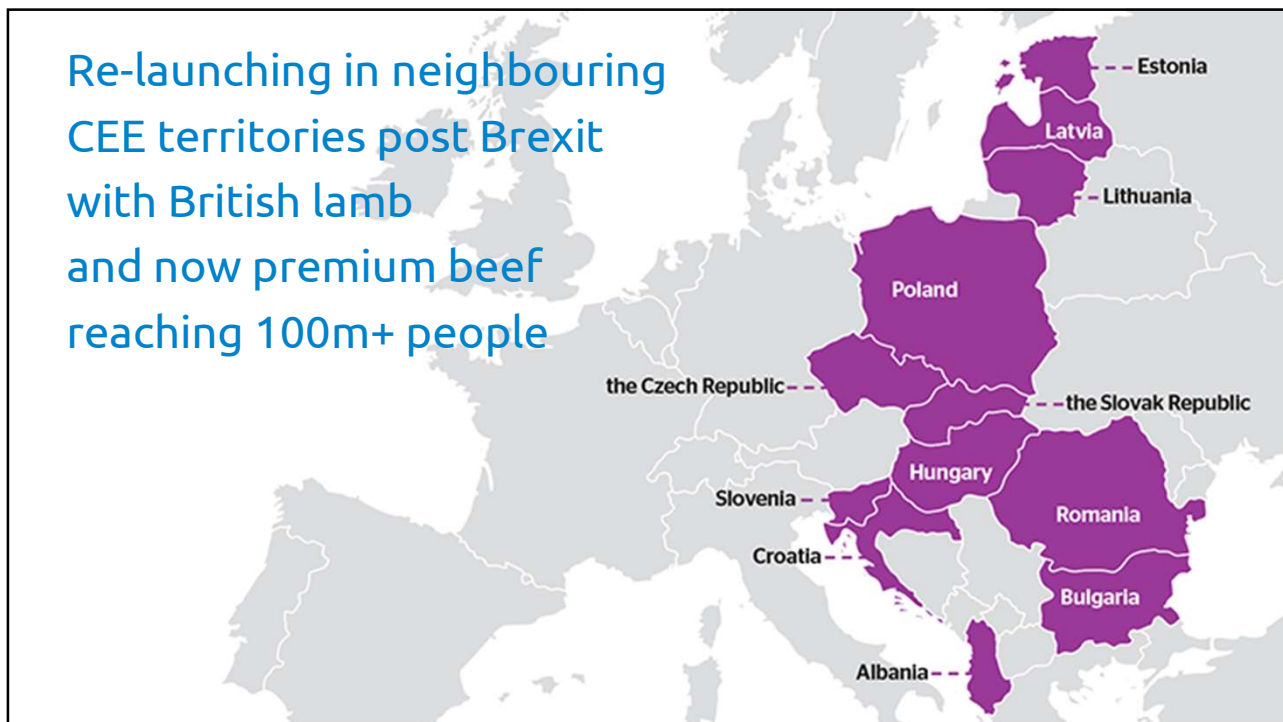


*Gourmet PIEROGIES – Polish dumplings with Exotic fillings using British Beef*



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## EU contacts

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