

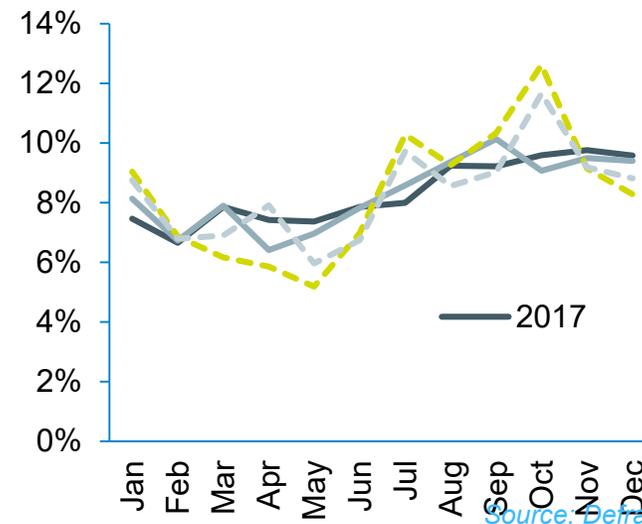
AHDB and Exports

Phil Hadley

International Market Development Director

Why?

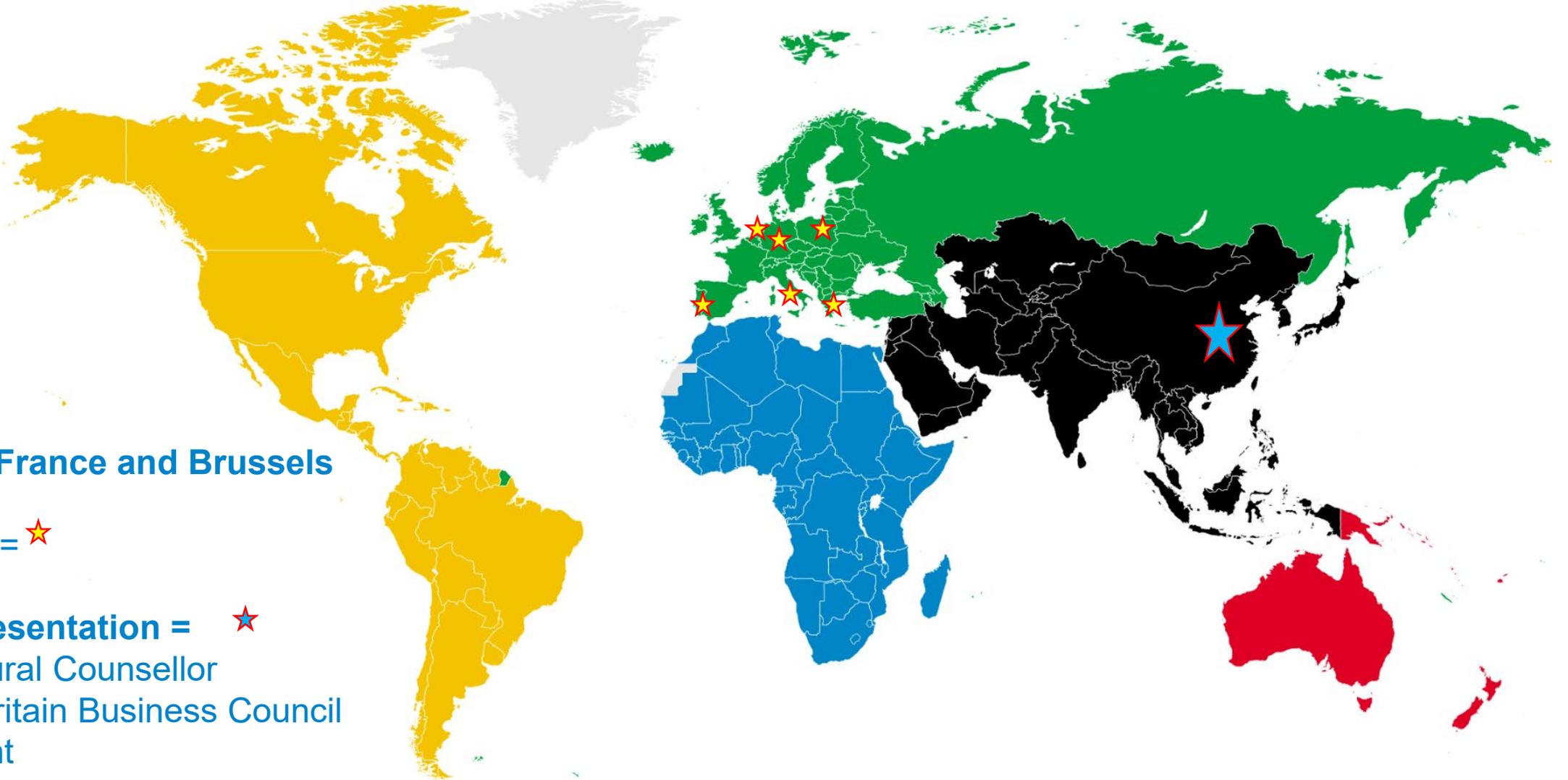
- Adds value to production in high end markets- building the UK brand
- Exploit our differences & build reputation (eg: high health status seed potatoes)
- Utilises over supply and address peaks in seasonal production
- Carcass balance for the products not in demand domestically



Strategy/Vision

- Strategy to create conditions to achieve access, support technically and facilitate market opportunities for the benefit of our stakeholders
- Support Government on official access negotiations
- Develop contacts, networks, market intelligence and dynamics
- Allow commercialisation once pump primed and to manage market risks
- Aligned to Government export plans
- Also aligned to other organisations to leverage funds, resource, eg BPA and BLG collaboration on genetics- enhancing UKs reputation for quality meat/livestock
- *Working under Strategic Priority 3: Helping the industry understand and deliver what consumers will trust and buy*

Current External Network – Worldwide



Offices In France and Brussels

EU Agents= ★

Asia Representation = ★

- Agricultural Counsellor
- China Britain Business Council
- HK agent

Recent access successes

- China: Beef ban lifted (est value £250M/5 years) and sheep market access discussions beginning. Widening of dairy access. Seed potatoes agreed. Ongoing dialogue on technical requirements for cereals.
- Japan: Beef and sheepmeat approval anticipated (est £15M/pa)
- Taiwan: Pork access granted in August (est value £50M/5 years)- recent Ministerial launch
- Philippines: full access for beef, lamb added to existing pork access
- Ongoing access dialogue with US, Mexico, South Africa, India
- Cuba: seed potatoes, commercial breakthrough to trading in the marketplace
- **AHDB seen has a key role with stakeholders and Government alike**

Dairy highlights- focus on three key regions



China: growing dairy interest



US: largest non-EU market



Gulf: growing foodservice demand

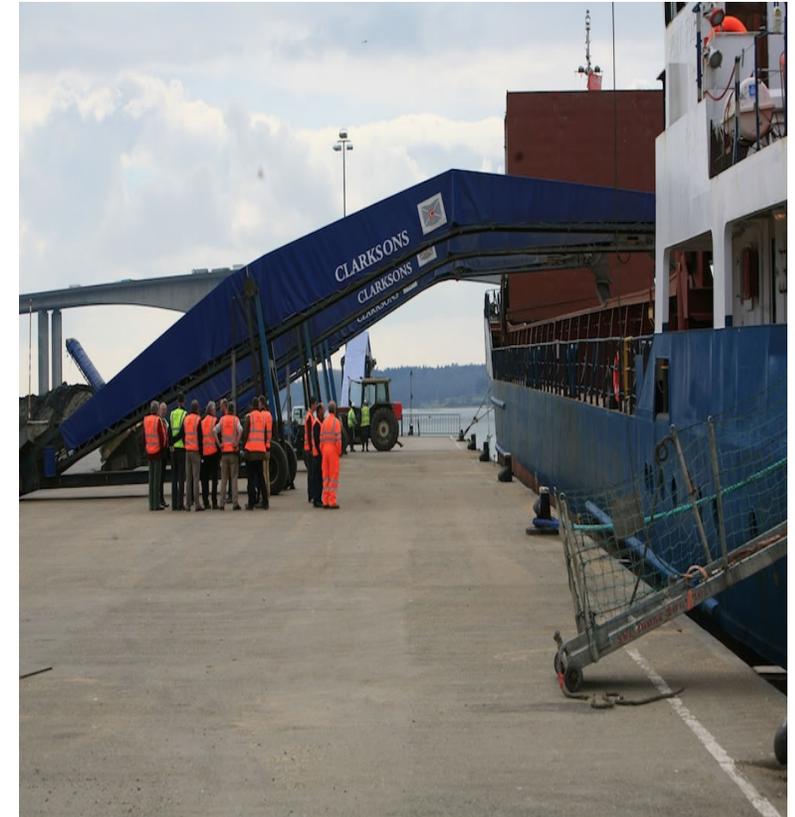
Cereals highlights- MENA, China and supply chain



Cairo Baking Workshop



Chinese Inward Mission



Meet the Exporter

Potatoes highlights- increasing market opportunities



Kenyan Inward Mission



Potato Trials in Kenya



Fruit Logistica



CHIPS TO CHINA Fresh Brexit boost as landmark £240million dairy and potato deal signed with China on 28th August

Trade Secretary Liam Fox signed two fresh deals with Beijing as part of trade talks - bringing British products over to China

Red meat highlights- EU, Asia and Americas



China: pork worth £70M in '17



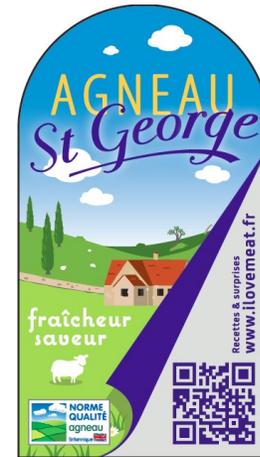
Philippines: trade up 45% in '17



Hong Kong: trade up 46% in '17

Red Meat highlights- EU

- 17 exporters differentiating using origin, QSM, WC PGI in 12 targeted EU markets
- 9 exporters engaged in QSM marketing activities with 23 major national retailers



France- 13 exporters engaged in QSM



NOWOŚĆ

Brytyjskie Smaki.pl

KUP 2 DOWOLNE OPAKOWANIA JAGNIĘCINY BRYTYJSKIEJ I ODBIERZ UNIKATOWY SOS ZA 1 GR

Poleca **KEVIN AISTON**

Landjunker SELECTION

DRY AGED TOMAHAWK STEAK RIB-EYE-STEAK VOM RIND MIT RIPPENKNOCHEN

AGE 21

14 TAGE AM KNOCHEN TROCKEN GEREIFT, ANSCHLIESSEND WEITER BIS ZU 21 TAGE GEREIFT, FÜR EINEN VOLLEREN GESCHMACK, AUSSERGEWÖHNLICHE ZARTHEIT UND SAFTIGKEIT

DRY AGED TOMAHAWK STEAK

Price: € 19.43 / 19.99
Nettogewicht: 0.972

LAMB

Try it, love it

Objectives:

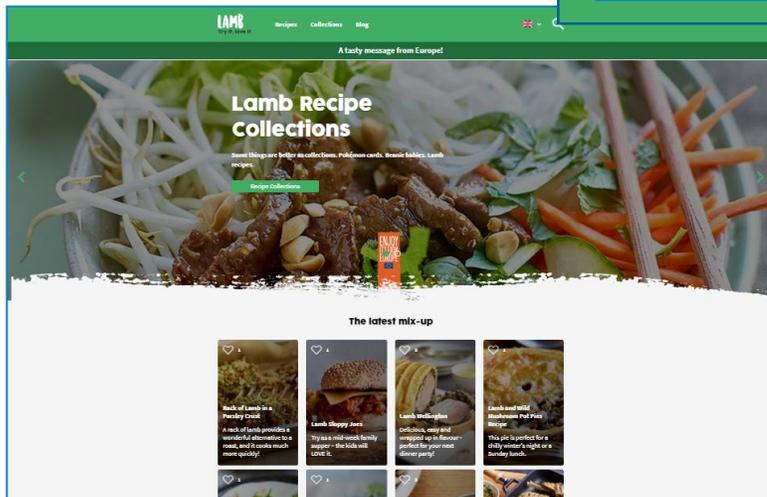
- Modernise the image of lamb to increase consumption
- Enhance the image of European lamb production
- Target the campaign at 25-35 year olds in England

€4.5m
over 3 years &
€ 10M overall

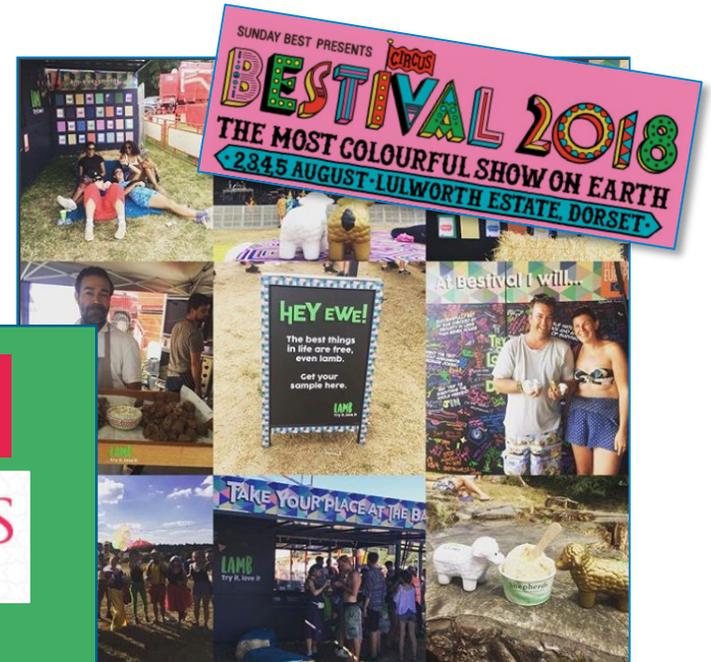
Influencers



Digital



Media Partnerships



Events

Recent activities

- Philippines and Angola outward missions
- New agency in HK with focus on younger consumers and first young chef competition- high value market
- Middle East- Gulfood key regional event in February- meat and dairy
- China region- valuable & growing market, with challenges (price, disease, SPS)- in-country presence and programme of activity across sectors
- North America- active pork trade, market access sought for beef/lamb. Canada show presence with QMS/HCC and GREAT branding
- Chief Veterinary Officer recent visit to China, Japan and Taiwan to continue on-going access momentum- working with DEFRA, APHA, devolved administrations *et al*

CVO outward



- Building relationships
- Ensuring issues are fully understood and resolved effectively
- Seeking further access while underpinning existing access
- Understanding the marketplace and challenges/opportunities
- Supporting where appropriate- disease outbreak control
- Being 'serious' about trade and outward looking

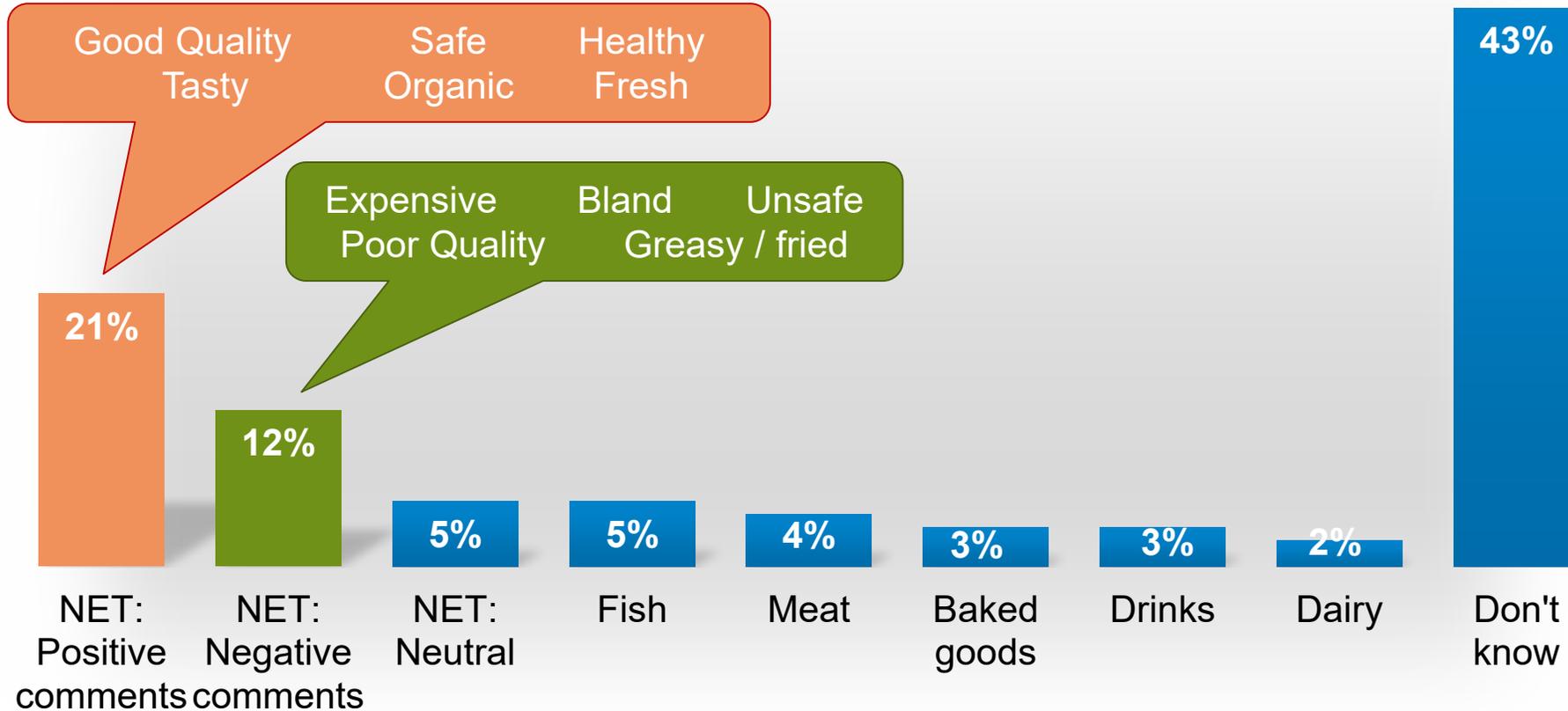
SIAL Paris- 21-25 October 2018



- EU major food event
- 27 exporters registered
- 15 exporters with booths, inc INI/LMC
- As part of joint approach with HCC and QMS
- Ministerial visit
- 300 delegates for GREAT BRITISH FOOD DINNER
- 14 dairy companies will exhibit alongside AHDB in the British Dairy Pavilion

What does 'British food' make you think of?

Unprompted associations with British food



➤ When asked to think about associations with British food, the most common response was 'Don't know', suggesting that awareness of British produce specifically is low and many people throughout the countries studied have no clear opinion.

Source: AHDB/ICM– International Consumer Perceptions Research November 2017

Q16 – Thinking about British food, what words and phrases come to mind? *Coded verbatim responses*. Codes <2% not charted. Base: All respondents (4,503)

In summary

- AHDB is seen by stakeholders and Government as having a significant part in the export success of our sectors, both in achieving market access and facilitating trade
- UK plc generally has a positive image for quality food products, including food safety, animal welfare and environment
- Stakeholders keen for broader export opportunities to grow trade and mitigate risks
- Brexit discussions remain on-ongoing and EU remains a key customer for UK agriculture products
- Third country export demand becoming increasingly important as global trade widens