

AUTUMN 2024

RUMINANT NEWS

AT THE HEART OF THE BEEF & LAMB INDUSTRY

**Driving change through
accurate, on-farm
environmental data**

**How to 'meat' the
growing global appetite
for beef and lamb**

GET READY FOR
a better future

Roots to Resilience is a transformative programme
designed to put people first and empower farmers

Funded by
your levy

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Get ready for a **better future**

Roots to Resilience is a transformative programme designed to put people first and empower farmers, helping them make informed decisions that benefit the economic, social and environmental aspects of their businesses. Amy Hughes, one of our Senior Engagement Managers for Beef and Lamb, gives her take on the programme.

We launched Roots to Resilience back in October 2023 with the aim of empowering farmers to take time away from their businesses to challenge their thinking and identify what they want to achieve and how they can apply change.

It applies systems-based thinking, which helps those who participate to see the bigger picture and how change can positively affect both their businesses and their lives. This approach recognises that agriculture is not just about individual enterprises, crops or livestock but involves a multitude of factors and relationships that influence each other and the entire system.

The three key principles of the programme are:

Ownership – be accountable for decisions made and respond in new ways.

Clarity – be clear about what you want to achieve and why.

Community – build your support network and champion others.

Our levy payers are at the heart of everything we do at AHDB. We understand that every farmer and every farm is different and that a one-size-fits-all approach is outdated and rarely successful. Roots to Resilience is our response to the evolving challenges and opportunities within the industry and reflects our commitment to supporting the agricultural community.

How it works

Roots to Resilience champions collaboration between farmers, industry experts and stakeholders to drive positive change.

The programme will facilitate knowledge exchange among farmers, allowing them to share their experiences, insights and on-farm practices. This farmer-to-farmer learning approach will foster a supportive community and promote the adoption of systems-based thinking. It will provide farmers with the tools, skills and resources to identify their personal goals and optimise their farming systems to improve the resilience of their business.

The journey so far

In December 2023 we held our first workshop with Dallas Mount, hosting 50 farmers in Sutton Coldfield. Dallas has worked with thousands of ranchers and farmers across the USA, Canada, Mexico and Australia to position their businesses for economic profit and ecological health through his world-renowned 'Ranching for Profit' course.

The workshop identified key topics that are important to farmers, and we have used these to form our knowledge exchange programme for the year. In January, we ran events across the country with Jason Rowntree from Michigan State University on balancing food production and ecosystem function. In July, we were joined by Emily Grant, founder of Forrit Consultancy, when we looked at finding opportunities to work on your business not in it, the foundations of financial management and managing and prioritising your time.

What's coming up

It doesn't stop there. We have some great plans for you in the next couple of months.

Discuss the Undiscussabull™

In October we will be welcoming Elaine Froese, a world leader in family communication, coaching and farm family transition management, to the UK. She has influenced 9 million people across the course of her career. She will help run our Discuss the Undiscussabulls events which will run from the 21 October to 30 October at venues across the country.

We know succession is one of the biggest threats to UK agriculture. Clashes between the outgoing generation and the incoming generation are common, as they can sometimes struggle to communicate their wants, needs and feelings. Families are frequently left in difficult situations when someone passes away and they realise there is no will or plan for the transition of the farm.

These issues are not limited to family situations. People farming in partnership with non-relatives will also have to have difficult conversations about the direction of the business. The Discuss the Undiscussabull events will give attendees the skills to have these conversations and to plan and develop their farming businesses. It's going to be a great session with some valuable take homes, so I encourage you to come along to an event near you.

Roots to Resilience workshop

In November we are excited to welcome back Dallas Mount to run another Roots to Resilience workshop. Last December they were a sell out, and we can't wait to run another workshop with him.

It will be very different to what you have done before. Thinking and talking about what you want could feel

uncomfortable, however, Dallas has years of experience in facilitating these conversations so you will be in good hands. Ultimately, we want you to come away feeling empowered, in control of your farm's future and knowing the next steps for achieving your goals.

Don't just take my word for it though, here's what some of the farmers who attended last year had to say...

Andy Martin, a beef, sheep and arable farmer from Ludlow in Shropshire said: "To those thinking about signing up to the Roots to Resilience workshops I would say be brave, take the opportunity to meet like-minded farmers, be confident, learn as much as you can and have fun! Through my experience my confidence has improved, and I have been able to implement changes in my business that are going to see a better future for my family."

Ed Bray, a sheep farmer from Market Rasen in Lincolnshire, said: "It seems like a big sacrifice taking time away from the farm for a few days, but I saw it as a real investment in myself personally and in the business. It gave me a fresh perspective and I came home with lots of new ideas and skills – it's definitely worth it."

To find out more about Roots to Resilience and to sign up to our upcoming events, visit ahdb.org.uk/roots-to-resilience

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Driving change through accurate, on-farm environmental data



AHDB is addressing the intense pressure faced by farmers to deliver on environmental targets through its new baselining pilot. AHDB's Environment and Livestock Science Director Chris Gooderham tells us more.

Agriculture is facing the biggest challenge of a generation in demonstrating the positive impact farming systems can have on the environment. This is amplified by a lack of accurate, on-farm- level data.

To help the industry to tackle this issue we have launched, with support from Quality Meat Scotland, a baselining pilot which will help farmers unite and take action by collecting accurate on-farm data and evidence to safeguard the future of British agriculture, ensuring it receives fair recognition and reward.

The project will provide a starting point for tracking changes in greenhouse gas (GHG) emissions and carbon sequestration over time and identify where there are opportunities to make improvements. It aims to show:

- The environmental impact of agriculture in GB
- The scale and potential of natural carbon stocks and sequestration
- The industry's progress towards net zero

The pilot will allow the industry to demonstrate how it delivers a collection of public goods, benefiting all of society, such as improving water quality, reducing greenhouse gases, building carbon stocks, enhancing soil health and supporting biodiversity both above and below ground.

Farmers want to know their numbers

We had a great response to the launch, receiving 509 expressions of interest to take part in the project. This just goes to show the interest out there for farmers to gain in depth knowledge about their environmental impact.

We could only take 170 farms through, so we have spent the last few weeks selecting the farms to join the pilot. We made sure this was objective and impartial as it was important we included a good range of farms, covering all our sectors, and a mix of production systems, land management uses and soil types. We also wanted to ensure we included some farms who were at the start of their environmental journey as well as others who have been on it for some time.

While the pilot isn't designed to be representative of the whole of British agriculture, it is important for us to be able to compare different farming practices.

Empowering farmers

The project work will start in November 2024 and the farmers selected will gain a full understanding of their individual farm's environmental performance and obtain the knowledge and confidence to make changes to safeguard their future.



The following activities will take place on farm:

- Aerial LIDAR (light ranging and detection) scanning to assess above-ground carbon stocks in trees and hedges, as well as mapping run-off risk
- Assessment of field soil carbon levels
- Soil analysis
- Carbon audit and action plan

The activities will cover both cropped and non-cropped land, such as woodland, enabling us to test the counterfactual – what would happen if the land wasn't being farmed.

The environmental journey these farms will go on will provide a host of win-wins. The good thing about storing more carbon in the soil and reducing emissions is that, in most cases, the result is improved soil health, reduced inputs and greater production efficiency. Our aim is to explore and demonstrate this on a range of commercial farms and show what industry could achieve.

Benefiting the wider industry

The pilot is the starting point to measure any changes delivered by the farmers taking part. However, it will also provide a huge dataset from which we will be able to draw some early observations. For example, the relevance of carbon stocks, the potential for increasing soil carbon storage, and what impacts it.

Early on we will also be able to gauge the relative capacity of above-ground and below-ground carbon, the impact of farming methods and land uses on emissions, carbon stocks, biodiversity, run-off risk and soil health. By measuring and analysing this data it will help us understand the critical elements that could be rolled out across the rest of the industry.

We also want to see what else the technology can deliver, pushing the boundaries to understand what is possible in terms of accurately measuring environmental metrics, particularly using remote monitoring from satellites which could help with measuring more frequently and at lower cost.

Rewriting the narrative

Ultimately, this project is more than just a pilot, it's a movement to redefine how farmers are recognised for delivering both food and environmental goods. It will demonstrate the true environmental impact of agriculture in Great Britain, the scale and potential of natural carbon stocks and sequestration and the industry's progress towards net zero. It's a transition to informed action and debate about British agriculture. For more information, visit ahdb.org.uk/baselining

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AHDB at the Anuga food show

James Small, a beef and sheep farmer from Somerset, tells us about his experience at the 2023 Anuga World Food show.



Having attended Anuga – one of the world’s largest and most important trade fairs for food – in Cologne, Germany, last year, I wanted to share what I discovered and learned.

As a beef and lamb producer, I’m a reasonable contributor to the AHDB levy. We’ve all seen that deduction off the price we’re paid, either from the abattoir or the livestock market, and, I suspect like most payers, I’ve grumbled about it. So where does it go and what is it spent on?

The recent Shape the Future vote saw us, the levy payers, being able to influence how the levy is invested. The priorities are now focused on marketing, exports, insights and evidence, working to enhance our reputation both at home and abroad. Is this important and does it matter?

Well yes, we (the UK) are now facing a less enshrined future, outside the trade and customs wall that surrounds the EU. We are more exposed to world trade and must operate within the trade deals that our government of the day agrees to. We need to protect the hard-won reputation of our domestically produced meat within our own valuable home market (65+ million people who are in the top 5% wealth bracket of the world), but we also need to look beyond our shores to opportunities elsewhere.

Let me be clear, I don’t think we’ll ever be the cheapest producers in the world, but we are passionate about our vocation, have a wonderful, flavoursome and sought-after product, which has a fantastic story. In addition, tough national regulations ensure traceability, provenance and safety throughout the supply chain.

Being able to see first-hand the AHDB Beef, Lamb and Pork export team in action at Anuga gave me what I can only describe as a sense of pride at being a part of this story. AHDB’s welcoming stand was prominent and centrally located in the meat hall. It was designed to allow a selection of British producers and processors to have a presence in their own branded areas around the edge, inviting interest from passing attendees under one banner.

Within the stand was a large seating area – a place where business could be done, conversations struck and details exchanged. At one end was an open kitchen, with a team preparing a tasting menu of British produce. This may have seemed excessive, but I quickly realised that this was a brilliant piece of marketing. Existing and potential buyers could meet producers and processors, hear the story of our product, discuss their requirements and try a sample all at the same time.

These export markets and their requirements are about seeking and seizing opportunities. It’s not about exporting a carcass but, rather, parts of the fifth quarter or specific cuts of meat. For example, Japan is a key market for beef tongue, but we need to understand and meet their rigid requirements.

This is where the knowledge learned and shared by AHDB’s Export team kicks in, opening these discussions, creating opportunities and communicating each party’s demands and offerings throughout the chain.

There are huge opportunities in the sheep sector, with a particular eye on the halal market, both at home and abroad. It’s recognised that our temperate climate and breeds of sheep, which are grass fed, produce a wonderfully flavoured eating experience. When combined with cultural and religious requirements, this makes British lamb an obvious choice. But we need to understand these requirements and why they are important to the purchaser to ensure that British lamb is always the first choice.

During my day at the show, I visited, spoke to and listened to delegations from other countries, including the USA, Argentina and Uruguay. We discussed export requirements, production methods, farm types, climate challenges and how each country collects and spends levy monies. Some of the key points included:

1. Traceability and food safety is a priority for importers
2. Many of their animals start their lives on grass farms but finish on a cereal diet in a feedlot (sheep and cattle)
3. The climate challenge is affecting us all
4. In every country whose delegates I spoke with, producers pay some form of levy
5. Some countries have better government support, in that they match-fund the levy collected or assist in another way
6. The British brand is widely recognised and respected – we don’t need to convince other countries that we can be trusted, but we can’t be complacent either, we need to continue to work at retaining and building that trust
7. An export deal isn’t done in one jump, it’s a series of small steps, and it takes a long time, sometimes years, to foster relationships, trust and confidence – they are hard-won and easily lost
8. There simply isn’t any other organisation that can facilitate and create these export opportunities for us like AHDB can

So, is AHDB worth the levy it collects? In short, I wholeheartedly believe so. Even with the modest amount collected, the organisation can multiply each £1 of spend into over £11 worth of value returned. No matter the value of the finished lamb, but let’s say it’s an average of £90, the producer pays a flat rate of £0.60 – that’s less than 1% of the value of the lamb. If the proposed increase to £0.75 happens, it’s still below 1%. Look at it another way, in one of the diversified businesses we have on the farm, we spend circa 20% of turnover on marketing.

“ There’s no point in having a great story and product if you don’t tell people about it or make it easy for them to get a hold of it ”



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

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Evidence-based communication

AHDB's Let's Eat Balanced campaign, which launched at the start of 2024, has sparked important conversations about the benefits of red meat as part of a healthy, balanced diet. AHDB's Head of Media Relations, Phil Maiden, explains more.

While we welcome the interest in our marketing campaigns, we feel it is important to push back on those misconceptions that we have seen widely reported and provide the evidence that debunks their claims.

One such criticism came from the Plant-Based Health Professionals (PBHP) and the Doctors Association UK. They sent an open letter accusing AHDB of promoting misleading health claims, neglecting the negative environmental impact of livestock farming, and not adequately addressing the health risks associated with meat and dairy consumption. It urged AHDB to retract the campaign and collaborate with healthcare professionals to promote more sustainable dietary practices, focusing on plant-based foods.

AHDB's response to misconceptions

AHDB responded by strongly refuting the claim that the Let's Eat Balanced campaign is misleading public health messaging. AHDB takes a science-based approach to communicate accurate and transparent information about the nutritional benefits of red meat and dairy, in accordance with the Great British Nutrition and Health Claims Register. The 'Let's Eat Balanced' campaign supports the government's dietary guidelines, the Eat Well Guide, which encourages a varied, healthy and sustainable diet.

On social media

As with many things, we see a lot of misinformation spread on social media too. In a tweet on X, the TV presenter

Chris Packham labelled the campaign "dangerous propaganda". As an evidence-based organisation, the allegation was hard to ignore. Especially when all the claims made within the Let's Eat Balanced campaign go through stringent checks by AHDB's experts and are reviewed by the Advertising Standards Authority to ensure their accuracy. We play by the rules and that's why we felt compelled to raise this issue with Mr Packham's employers at the BBC.

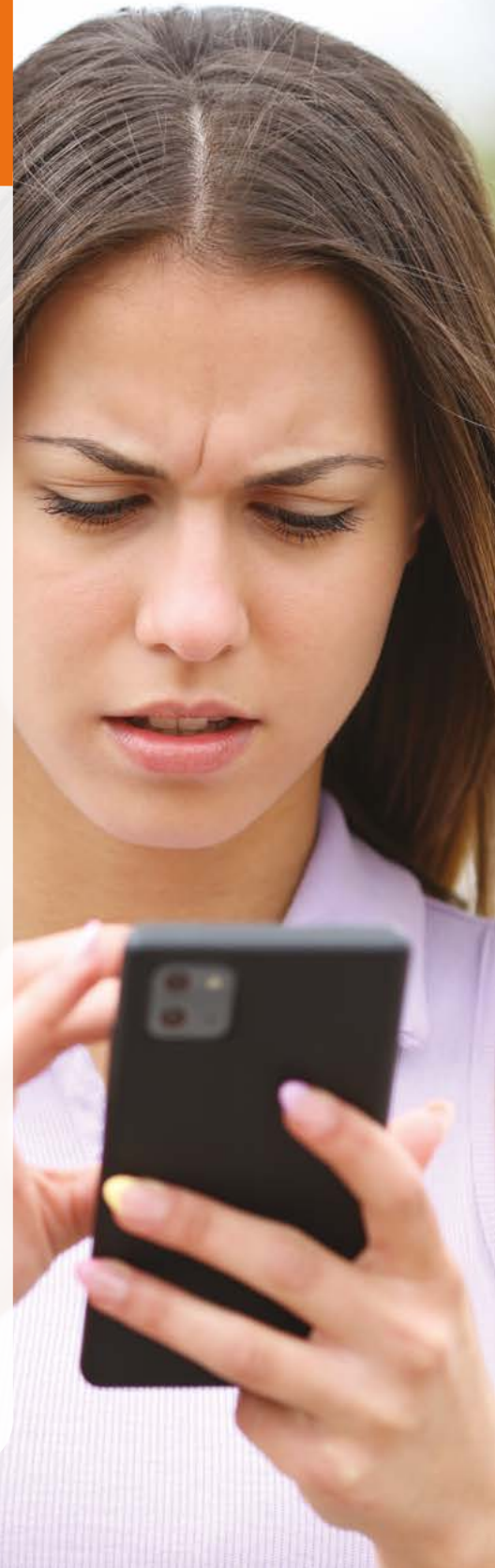
Supporting British Agriculture

AHDB is committed to the evidence that shows British red meat and dairy are produced in a highly sustainable way. Agriculture is asked to manage and deliver multiple public goods on behalf of the nation such as providing nutritious, affordable food, and its contribution towards net zero which is largely overlooked within current scientific evidence. This is why we will continue to support our levy payers by carrying out research such as our baselining pilot: ahdb.org.uk/baselining and challenging inaccurate claims in the press and social media.

If you would like to find out more about some of the claims we have challenged and how we work with the media, please visit: ahdb.org.uk/challenging-misinformation

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Free ingredients into schools: A recipe for success

AHDB's Head of Education, Roz Reynolds, updates us on how the free ingredients into schools programme is going.



Earlier this year, as part of our education work to build children's confidence in cooking and nutrition, we launched an initiative to provide free ingredients to schools.

In collaboration with the British Nutrition Foundation, this ambitious programme aimed to empower students with practical cookery skills, overcoming budgetary constraints that often limit these activities.

Enthusiastic feedback

The initiative has seen an enthusiastic response, with more than 2,500 students across England engaged in hands-on cooking. The programme supplied essential ingredients, such as British pork, beef, flour and dairy products, enabling schools to offer practical food lessons that many would otherwise struggle to afford.

Teacher surveys revealed overwhelmingly positive feedback, with 100% of students expressing an interest in cooking again with dairy, flour and beef. Teachers reported significant benefits: 94% noted increased student skills and confidence and 90% observed improved cooking knowledge. Additionally, 67% of teachers highlighted enhanced understanding of healthy eating among students.

Emphasising the programme's impact, Roz commented: "We know the cost of ingredients for practical food lessons can be a challenge. From the positive feedback we received, it's clear this initiative has removed barriers and inspired young people to cook with quality ingredients produced by UK farmers."

With support from Lidl, UK Flour Millers and school caterers Elior UK and Hutchison Catering, alongside their suppliers Bidfood and Turner Price, the initiative was implemented through three mini pilots which used British pork, dairy, flour and beef.

British Beef Fortnight

British Beef Fortnight took place from 22 April to 3 May 2024, with 1,265 students from 14 schools making aromatic beef and potato curry.

Jake, a Year 8 student, describing the dish, said, "It smells and tastes banging," while teachers appreciated the opportunity to watch students work independently and confidently. One teacher noted, "[The best part was] giving all students the opportunity to cook and being able to watch them work independently and confidently."

Impact and future plans

The pilot project reached 15 schools, with several engaging in more than one activity. This initiative notably impacted schools with higher than average percentages of students eligible for free school meals, demonstrating the programme's reach to diverse student populations.

Looking ahead, the goal is to expand the initiative to more schools, continuing collaboration with partners to support its growth.

This initiative represents a significant step towards supporting practical food education in schools, removing barriers and inspiring young people to cook with quality ingredients produced by UK farmers. The gratitude and enthusiasm from teachers, students and parents alike highlight the project's success and potential for future growth.

Find out more at ahdb.org.uk/education



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Focus on halal

Halal is often talked about as an important market for British livestock producers – particularly lamb. AHDB Beef & Lamb Engagement Manager Karl Pendlebury has been speaking to Senior Halal Manager Dr Awal Fuseini to find out why this is the case.



Tell me about your role at AHDB?

I support levy payers both in the UK and in export markets to tap into the opportunities that exist. In the domestic market, I work across teams including the Knowledge Exchange team and Marketing. In the Export team, we work with exporters in the UK to expand the reach of countries and customers taking the product, along with understanding the slaughter requirements in the main halal markets.

Why is halal so important to British beef and lamb producers?

If you want to evaluate its importance, you need to look at consumption. Muslims tend to spend more on meat than the general population and they also tend to consume more meat per capita compared with the general population.

How do you go about your daily role in the Export team when promoting British halal outside the country?

We work closely with UK food processors to identify the markets they want to export to. We then identify the main buyers from different markets – I look after both the African and Middle Eastern markets, so I know most of the main importers in those regions. We connect the exporters and the buyers through inward and outward trade missions, as well as events such as Gulfood and the Saudi Food Show. This allows exporters to interact with buyers from across the world.

How do you interact with the Muslim community and that market within the UK?

We speak with the Islamic scholars to educate them about what happens on farm – they make decisions on halal so that allows us to connect with consumers. The Muslim community has huge respect for the Islamic scholars and what they say to the congregations at mosques, so it is very important they deliver the correct message.

We also work with retailers and processors so that they know what we do on farm and what our processors do in terms of halal meat production and that it is certified by a competent authority of the halal sector.

The halal market is arguably the fastest-growing sheep meat market in the world, why is that?

Meat is an important part of the life of Muslims, and they consume a lot of it – at social events or religious festivals, for example. We know lamb is very important as it is the second most consumed meat behind chicken; beef is also an important meat for Muslims. Because the Muslim population is growing, we are seeing an uptake in consumption, particularly of lamb.

If you had to choose one myth to bust about the halal market, what would that be?

Our biggest challenge here is the slaughter method. Many farmers and consumers do not have the facts surrounding halal slaughter. The majority of small ruminants in the halal sector are slaughtered in the same way as conventional slaughter. The animals are electrically stunned and then slaughtered – the only difference is that in the halal slaughter, a short prayer is said, similar to grace being said by Christians at the beginning of a meal. Halal has additional requirements in that the slaughterer must be approved by the halal certification body.

How do you interact with AHDB's beef and lamb engagement team and the farming community?

The engagement team plays an integral role in bringing farmers closer to the halal sector by organising meetings where we have the opportunity to interact with thousands of farmers. This has created a platform where we have been able to allay the fears of most farmers and reassure them that animals are handled as well as they would be in conventional slaughter.

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The sector council's view on halal – Gulam (Gama) Khan

When I first joined, halal was quite dormant. For example, some of the campaigns were targeted at the generic consumer and not a halal consumer. What's happened over the last two years is that we have seen an increased awareness in its importance to consumers in the UK and overseas.

Currently, individuals within AHDB, for example Dr Awal Fuseini, represent halal, giving knowledge to the farmer. But there is a massive education piece required so that Muslim consumers understand more about the industry and how this food is produced. The market is worth around £1.7 billion and growing steadily, with around 75% of all sheep slaughtered in the UK designated towards halal.

I would like AHDB to take a proactive step in engaging with Muslim consumers, not only when it comes to beef and lamb, but we should also be looking at the Dairy and Cereals & Oilseeds sectors as they also provide our levy payers with some fantastic opportunities for growth.



The analyst's view on halal – Vanessa Adamson, AHDB Retail Consumer Insight Manager (Red Meat and Dairy Consumer Trends)

In 2019, we conducted a consumer research project on halal and we've recently completed a new project this year, as there is a gap in the market in terms of knowledge about the halal red meat sector.

Our previous findings showed that although Muslims account for 6.5% of the population, they consume around 20% of all lamb sold in the UK.

In our latest research with The Smithfield Collective, which will be shared later this year, 80% of the Muslim community are consuming lamb at least once per week compared to less than 10% of the general population in the UK.

In the 2019 report, the average spend on red meat for a UK household was £12.60 a week, whereas spend on halal was about £28.50 a week according to Kantar Worldpanel. With the recent cost-of-living crisis and rising food prices, the weekly spend in 2024, has been further accentuated with halal shoppers spending 2.5 times more on meat than the average UK shopper. Our new halal report on halal retail and consumption trends will be published later this year.

Supporting farmers to host school farm visits

Serena Colwill, a fourth-generation farmer from Exford, Somerset, tells us about her experience of being part of the School Farm Visits Support programme.



Last year, AHDB embarked on an exciting journey by launching its first education pilot programme to help farmers start their own school farm visits. This opportunity, delivered in partnership with LEAF Education (Linking Environment and Farming), was open to farmers across all sectors represented by AHDB. Twenty farmers were selected following an open application process to receive funded places, offering them training and one-to-one support to give them the knowledge, skills and confidence to deliver safe, high-quality and memorable school visits.

The programme kicked off in November 2023, providing fully funded Countryside Educational Visits Accreditation Scheme (CEVAS) training and accreditation. Among the aims of this pilot was to give more children the chance to experience a real working farm first-hand and better understand where their food comes from.

The CEVAS training could either be completed face-to-face with two full-day training sessions or online via weekly two-hour sessions over six weeks. Farmers had access to their CEVAS trainers (LEAF's education specialists), who were always quick to address their queries. The course provided all the necessary information and know-how to confidently deliver memorable school farm visits.

Serena successfully completed her course and held her first school farm visit with the support of a LEAF education specialist. "My one-to-one support was invaluable in helping me deliver the perfect session for all age groups," Serena said.

"Overall, I have had a fantastic experience with the School Farm Visits Support Programme. I would like to thank LEAF and AHDB for giving me the opportunity to enhance my knowledge in delivering educational farm visits on our farm at no cost. It has really helped me build on the success of my business"

“ It’s a way to sharpen my skills and learn new things. It also allows me to hear from other farmers ”
Serena Colwill, farmer, Exford

One of the farmers who eagerly embraced this opportunity is Serena Colwill, a fourth-generation farmer managing her family farm in Exford. Serena saw this programme as a golden opportunity. "It's a way to sharpen my skills and learn new things," she explained. "It also allows me to hear from other farmers."

Serena passionately believes in the importance of inviting young people to her working farm. "It not only benefits their mental health but also helps them understand about where their food comes from, how we care for our animals and the environment. Each child should be given the opportunity to experience this."

She learned about AHDB's fully funded school farm visit programme through LEAF and decided to apply. Reflecting on the application process, she said, "It was simple. We were given the option to do the CEVAS training online, which was very beneficial considering my location and family commitments."

Reflecting on the pilot project's success, Roz Reynolds, AHDB Head of Education, said: "We are glad to have supported 20 farmers on their journey to hosting school visits to their farms. Our farmers have put in a lot of hard work and it's great to see them now hosting their first visits with huge success and giving young people a unique opportunity to learn where their food comes from through experiencing a working farm first-hand, which is so powerful."

Following the programme's success, AHDB is continuing to support more farmers following an open application process.

For more information, please visit ahdb.org.uk/education

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Business outlooks and beyond



Izzy Shohet joined AHDB in October 2022 as a trainee analyst and moved to the Livestock team as an analyst in April 2023, where her work focuses on the red meat sectors, specifically the domestic and international lamb markets. Here, Izzy talks us through a typical day for her in the Livestock market intelligence team.

AHDB's Livestock market intelligence team produces impartial and independent market information for levy payers and key stakeholders. This is broken down into key outputs for each sector, which include:

- Weekly articles on key industry developments
- Cattle and Sheep Weekly – a newsletter delivering the latest market information straight to your inbox
- Sector outlooks – our predictions for the coming year

Our weekly outputs are the bread and butter of our work, where we investigate the factors that influence red meat markets both domestically and overseas. These include production, prices, trade and consumer demand.

I focus on the lamb side of things, such as the price of lamb at any given time, and what and how factors are influencing it. This also includes keeping an eye on our international competitors and how their production and exports impact the UK market.

On a typical day, I will research the content we are writing, using industry knowledge and my network of international contacts to add context to the data. For me, this includes contacts in New Zealand and Australia, who provide me with the most up-to-date information on these markets, alongside domestic supply chains.

I will then turn this data and insight into digestible and meaningful content for people to read on our website. We also share our market insights through social media videos and podcasts, as well as newsletters. In our latest podcast venture – Agonomics with David and Jack – two of our economists examine the stories behind the numbers from the world of agriculture, and members of the Red Meat team regularly feature.

Another way we share market data is by attending and presenting at events. For example, I travel around England speaking to farmer groups, vets and processors. We work closely with our Retail and Consumer Insight team to bring the whole market picture to life.

In terms of newsletters, our main publication for sharing market news is Cattle and Sheep Weekly. We issue this every Friday, and if you haven't already subscribed, you can do so via our preferencecentre.ahdb.org.uk

Within this newsletter, we collate a range of news and information from across AHDB, such as:

- The latest market data
- Articles and analysis
- News and key updates
- Events

Are there other things you would like to see in the newsletter? Email us via redmeat.mi@ahdb.org.uk

Lamb market outlook

Our lamb market outlook provides a medium- to long-term look at what might be in store for the lamb sector over the coming months. It brings together my forecasts on the lamb crop, the breeding flock and slaughter numbers to predict what overall lamb production will look like for the coming year. It also includes predictions on what trade might look like and how this could influence the domestic market.

Our colleagues in the Retail and Consumer Insight team provide a forecast for lamb demand, which is also included in the outlook.

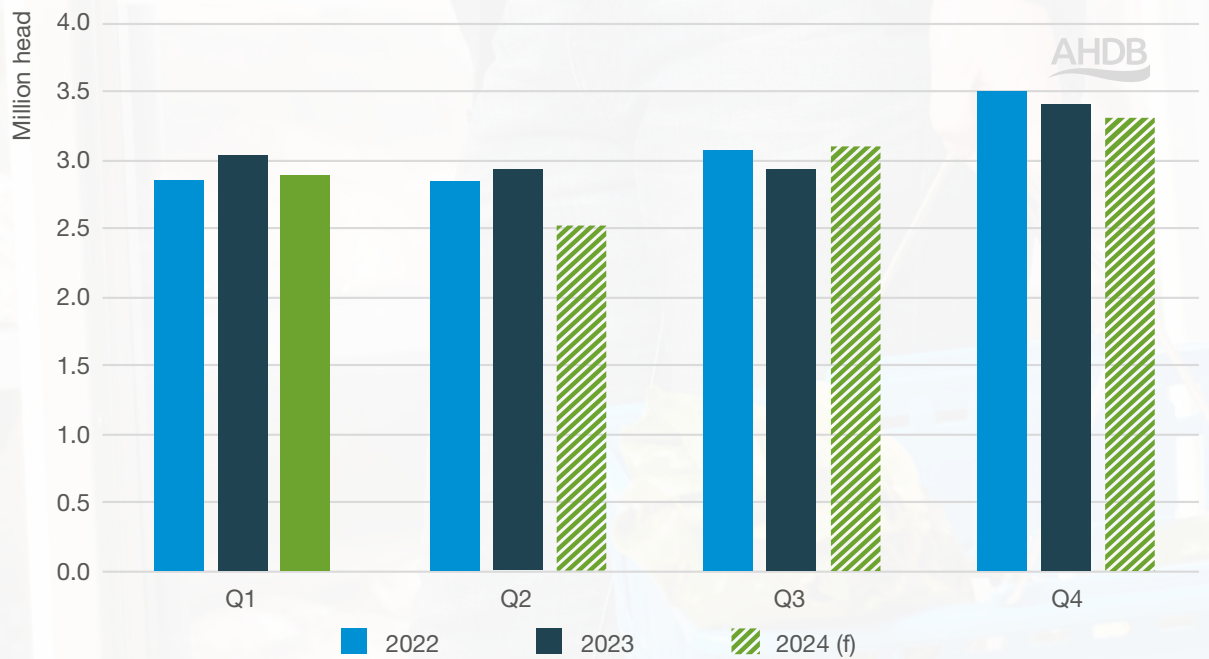
Key takeaways from the June market outlook:

- Total sheep meat production is expected to fall by 3%, to 278,000 tonnes, in 2024
- Retail and foodservice demand for lamb will remain pressured by consumer budgets, with consumption set to decline by 1% compared with 2023
- Imports in the first quarter of 2024 grew but are expected to slow for the remainder of the year
- Exports declined in the first quarter of 2024 and are expected to remain in decline given our falling domestic production

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Actual and forecast (f) UK clean sheep slaughter



Beef and lamb assurance in Europe



James Taylor, Head of Farm Assurance, discusses the second report in its series, comparing English beef and lamb assurance standards with those of key international markets around the world.

The report is the second in a series of four which will provide evidence to support the ongoing independent review into farm assurance in the UK.

The latest report compares farmgate production standards at both a regulatory and voluntary level in Germany, Poland, Ireland, France and the Netherlands with those in England.

The dominant assurance scheme in each nation was chosen for analysis:

- Red Tractor (England)
- Quality System (Germany)
- Quality Meat Poland
- Sustainable Beef and Lamb Assurance Scheme (Ireland)

- Label Rouge (France)
- Beter Leven (Netherlands)

Every farm assurance scheme contains its own modules and categories, which prohibits direct comparison. Therefore, the authors used 14 categories against which each of the schemes was scrutinised to understand and compare performance:

The report shows that Red Tractor achieved the highest average score, although other schemes scored higher than Red Tractor in five of the 14 categories considered.

Beter Leven (Netherlands) achieved a higher score in husbandry procedures and youngstock management and

matched Red Tractor's score for animal health and welfare, while Quality System (Germany) was the highest-scoring scheme in livestock transport, food safety and traceability, documentation and assurance.

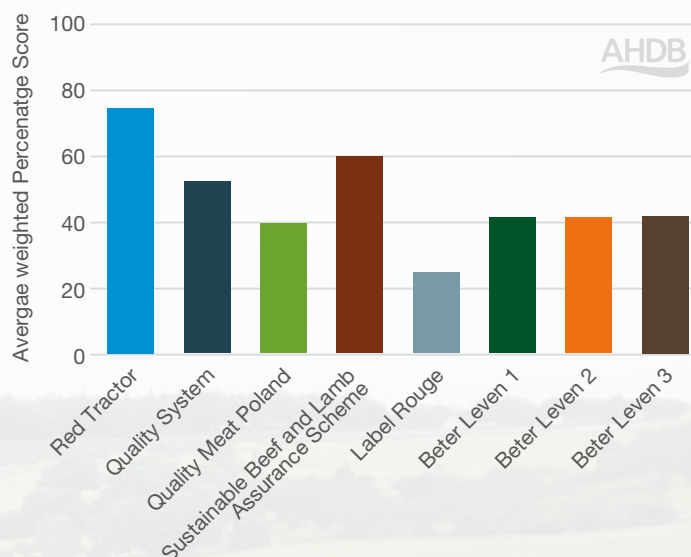
The authors of the report believe that there are areas of potential improvement for every scheme, in all categories.

The final reports in the series will compare farm assurance standards in North and South America, and will be published in October.

For more information, including copies of the reports to date, visit ahdb.org.uk/farmstandards-review-beef-lamb

Category	RT	QS	QMP	SBLAS	Label Rouge	Beter Leven 1	Beter Leven 2	Beter Leven 3
Traceability, Documentation and assurance	77%	79%	66%	74%	56%	67%	67%	67%
Personnel	72%	29%	11%	34%	0%	36%	36%	36%
Food Safety	77%	90%	71%	77%	30%	43%	43%	43%
Housing and Shelter	75%	60%	47%	62%	40%	64%	65%	65%
Feed and Water	85%	65%	62%	82%	64%	67%	67%	67%
Husbandry Procedures	74%	39%	55%	59%	57%	90%	90%	90%
Youngstock Management	81%	61%	46%	73%	70%	69%	71%	73%
Animal Health and Welfare	59%	57%	36%	50%	6%	59%	59%	59%
Animal Medicines	77%	59%	43%	58%	11%	51%	51%	51%
Biosecurity and Disease Control	67%	23%	42%	38%	0%	5%	5%	5%
Livestock Transport	52%	83%	44%	35%	0%	10%	10%	10%
Vermin Control	81%	33%	5%	52%	0%	4%	4%	4%
Fallen Stock	94%	55%	12%	79%	0%	0%	0%	0%
Environmental Protection	77%	0%	20%	62%	0%	0%	0%	0%

Beef and lamb assurance standards average scores



UK farm assurance review

This series of reports will feed into the ongoing independent-commissioner-led review into the future of farm assurance, which has been jointly commissioned by the National Farmers' Union (NFU) and AHDB, along with NFU Cymru, the Ulster Farmers' Union (UFU) and NFU Scotland (NFUS). This review is examining;

- How farm assurance can deliver value back to scheme members
- How standards are developed to meet the evolving needs of members, the markets they serve, sector diversity and an appreciation of the global marketplace
- How assurance members are engaged with (including the development of standards) and inspected and how technology is used in assurance now and in future
- How assurance schemes can and should fit with regulation and government schemes to best serve members

New Farm Assurance Lead

James Taylor has taken up the new role of Farm Assurance Lead at AHDB. His family are mixed tenant farmers on the Broughton Castle estate near Banbury and James previously sat on the AHDB Beef & Lamb sector council.

As well as farming, he previously worked on rural project and programme evaluations across Europe and further afield.

James said: "I'm delighted to have joined AHDB in this role and I'm looking forward to helping deliver robust evidence to inform the current debate over the future of farm assurance in the UK."

For further information, contact:

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The full picture: bull purchasing, with all the information



Harriet Bunning, Lead Animal Genetics Expert, and Seth Wareing, Senior Engagement Manager for Beef & Lamb, explain the benefits of using AHDB's National Beef Evaluations to select which bulls are right for your system.

Picture the scene: you've made the decision to buy a new bull and you're at the sale, show or farm. How do you decide which one to buy?

If you're looking for something that's going to put a bit more size or shape into your herd, you can look at a bull to get a good idea of what their calves might be like. In the show ring, the biggest bull with the best conformation tends to take the top prize. This means farmers have done a good job at breeding cattle with higher carcase weights and EUROP scores.

But what if your goal is breeding more productive heifers? Can you look at a bull and tell if his daughters will calve at two, produce a calf every year and ensure the calf will survive to weaning? A good start would be to look at his mother or sisters. If he was his mother's fifth calf in seven years, then he's probably carrying some good maternal genetics. This approach is beneficial when the information is available, but it's hard to get the full story for all bulls.

There is another way, which takes all the information from the British Cattle Movement Service (BCMS) from all animals and measures the quality of a bull's genetics – AHDB's National Beef Evaluations (NBE). This approach is especially important when looking at female production.

The information that comes from BCMS tells us how long an animal lives, when they calve and how many calves they have in their lifetime. When this is collected on a national scale and combined with the cattle's family tree, it can highlight the animals that will breed the best suckler cows. Our National Beef Evaluations measure the genetic quality of all breeds and crossbred cattle. We use pedigree information from all the major beef breed societies and milk recording schemes, combined with BCMS data on performance for three maternal characteristics.

Our carcase evaluations only use data supplied by abattoirs (from over 14 million animals), rather than performance-recorded data from pedigree breeders.

Characteristic	Definition
Maternal	
Age at first calving	The age in days of a heifer when she has her first calf
Productive lifespan	The number of calves produced by a cow in her lifetime
Calf survival	The probability that once a calf has been tagged, it will still be alive at 10 months of age
Carcase	
Days to slaughter	Age at slaughter, measured in days
Carcase weight	Cold carcase weight
Carcase conformation	EUROP conformation score
Carcase fat class	EUROP fat score
ADCG (average daily carcase gain)	A measure of carcase growth rate, equal to the carcase weight (kg) per day of age at slaughter

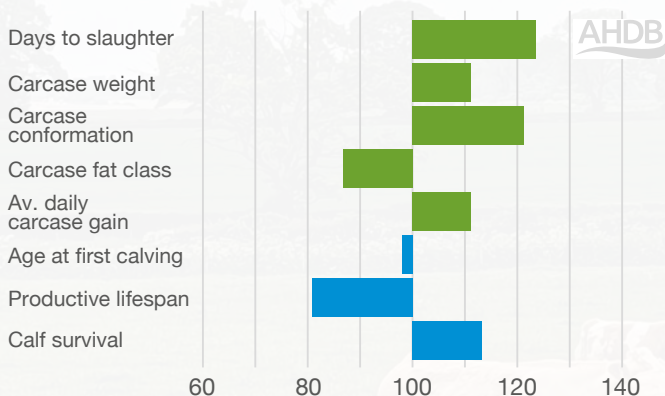
There are many benefits to this:

- More data with less effort: we use data that is already collected, rather than requiring performance recording by breeders
- Commercially applicable: we use data from crossbred and dairy-beef animals alongside pedigree beef
- Relevant measures: our measures directly affect profit: value at finishing depends on carcass weight and EUROP score; cost to finish depends on days to slaughter and carcass growth rate

How to use National Beef Evaluations

Results are displayed on our website in a chart. Each characteristic has a bar which shows the genetic quality, with bars further to the right typically showing a higher score. That means the bull in this example (figure xxx) scores well for carcass weight and growth, but his low score for productive lifespan means his daughters are likely to produce fewer calves than the average.

National Beef Evaluations



Why doesn't my animal have any results?

We only publish results when we have enough data to produce a reasonably accurate score. We continue to collect data from BCMS, breed societies and abattoirs and publish new results three times a year, so your animal may get results soon.

So next time you're headed to a sale or farm to buy a bull, go armed with all the available information, rather than just what the sellers want you to know.

For more information about NBE and to look up your cattle, visit:

ahdb.org.uk/knowledge-library/national-beef-evaluations

What's coming next for NBE?

We are continuing to update NBE, bringing new data together to improve our measures of genetic quality. For example, we're expanding to include new characteristics, such as cow mature size and TB resistance.

We are also combining characteristics to create EnviroBeef – a measure of the genetic potential to reduce the carbon footprint of suckler beef, which we hope to launch in the next 12 months.



For further information, contact:

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Unlocking the benefits of BALE GRAZING



Bale grazing originated in North America and is a grass and hay outwintering system for cattle that is seeing increased interest from UK farmers as a method of reducing costs. Katie Evans, Senior Knowledge Exchange Manager, explains more.

Bale grazing involves setting out hay bales onto pasture ahead of winter and feeding in a planned, controlled manner using electric fencing. The practice is well suited to dry, cold winters seen in North America, but more and more farmers are adopting the practice over here.

Budgets are tight, with soaring costs, especially given the bad winter we had last year, impacting feed and bedding availability. If done well, bale grazing can bring significant cost savings. As part of the Pasture for Life Innovative Farmers project, which is collecting data on bale grazing, AHDB have commissioned a report on the economics of bale grazing to help you decide if this is a system you could adopt on your farm.

The costs and benefits of bale grazing will be unique to each farm and will depend on the wintering system you already use. Broadly speaking, we have seen that reduced labour and bedding costs are the biggest differences between housing cattle and bale grazing over winter.

Laying out bales as soon as they are made reduces handling and storage costs and, depending on your housing set-up, fuel and labour costs are at least halved. With the cost of straw soaring, this provides the opportunity for significant savings when not using it for bedding. Good-quality hay will meet the nutritional needs of dry cows, so there are savings associated with making hay instead of silage, especially if you are also buying in straw to balance a silage diet. Empty sheds that would have otherwise been used for housing also present an opportunity for extra income.

It is also important to consider the benefits that can't be so easily measured. Farmers taking part in the Innovative Farmers field lab project said that some of the benefits of bale grazing included a better work/life balance, gaining more enjoyment in the day-to-day job and that creating a more sustainable way to run their cattle took the pressure off the rest of the business.

They also reported an increase in diversity, seeing more insects and wildlife on farm thanks to the introduction of new species into the grass sward. All of this can help farmers align what they are doing with their personal values.



Case study: Claire and Sam Beaumont

Claire and Sam Beaumont returned to Claire's 188 ha home farm in 2017 after a spell working in London as engineers. They have a herd of 52 animals of varying ages, with the cows calving at the end of April. Sam and Claire are aiming to have 100-head of cattle in the next few years. They are taking part in the Innovative Farmers project.

The farm consists of 33 ha of top fell, 430 metres above sea level. This is heather moorland and grazed by four fell ponies in summer. Below this is a 90 ha area of rough grazing and wood pasture, where the herd spends most of the winter on deferred grazing. On the lowest ground, there are 65 ha of meadows, managed on long 60- to 90-day grazing rotations throughout the summer.

Sam explains: "Using this system, I am thinking about what and where the animals will graze all year round. Bale grazing strategies differ on different farms. For us, it gives the cows something different to eat when the wood pasture has done its job and allows the meadows to get growing.

"I work out how much to give and where to place the bales using a free farming app and I move them between 8:00am and 9:00am every morning. It is a fluid and flexible process, which allows us to balance our family life and other

commitments. It is also good for me – I like the physical activity needed to roll out the bales."

The Beaumonts have noticed changes in sward composition, with more taller grasses, like cocksfoot, and more legumes and wildflowers, such as red clover, ox-eye daisies and plantains, and soil health is improving too.

They have also seen their costs reduce significantly, from £375 per head, when the cattle were housed, down to about £30/head last winter, and the cattle are healthier than ever. Bale grazing has also freed up the old shed, where they now salt and store hides for leather.

"We are passionate about maintaining the natural landscape and enriching the wildlife in this beautiful place," says Claire. "Cattle offer opportunities to do this. We can revitalise the grassland while producing very high-quality food. Using a low-cost system, which includes outwintering, allows us to do this and make a profit."

For further information, contact:

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Economics of Bale Grazing Report

The Economics of Bale Grazing report draws together management and financial information from seven farms across the UK that are currently bale grazing. It highlights where cost savings can be made before you apply a cost-benefit analysis to your own system. As always, when looking outwards at other farms, this report shows what's possible, rather than what's probable. To read the full report, visit ahdb.org.uk

Bluetongue 3: What you need to know

Dr Amey Brassington, Senior Animal Health & Welfare Scientist, explains what to look out for with the new strain of bluetongue, BTV-3. She discusses where to find help and what AHDB are doing to support you.



Bluetongue virus (BTV) is a notifiable disease affecting cattle, sheep and other ruminants, which is transmitted by midge bites. It does not affect people or food safety, and meat and milk from infected animals is safe to eat and drink.

There are numerous strains of the BTV. The first cases of the blue tongue serotype virus 3 (BTV-3) strain of the virus were identified in Great Britain in November 2023 through the annual surveillance programme.

Different species show varied clinical signs, but, generally, sheep show more acute signs and cattle show more chronic signs, with impacts on productivity.

CLINICAL SIGNS OF BLUETONGUE:

- Nasal discharge
- Crusting around the nostrils and muzzle
- Redness and swelling of the mouth, eyes, nose and skin above the hoof
- Swelling of the teats
- Fatigue
- Abortions
- Small, weak or deformed calves/lambs, dying within a few days of birth
- Reduced milk yield

Reducing the risk of BTV

BTV is most commonly spread by midges that are infected with the virus when they bite an infected animal. The midge now infected with the virus then bites an uninfected animal.

The time of year, temperature, wind direction and proximity and number of neighbouring farms all affect spread. The midge season is usually March to September, but some will survive throughout the year.

Control of midges is difficult. While it is unlikely that the risk of bluetongue disease can be completely removed on any individual farm, steps can be taken to reduce the risk.

Movement controls and restrictions for susceptible livestock in high-risk areas can minimise the risk of infected animals without clinical signs moving the disease between holdings. Free, voluntary testing is available from Defra for animals moving from high-risk counties, available from gov.uk

Contingency plans for disease outbreaks on farm and for if and when they might be in a disease-control zone should include details of where animals are normally slaughtered and check that the abattoir is designated.

We are advising farmers to 'ACT' on BTV-3 by being aware of how bluetongue is transmitted as a vector-borne disease, while providing caution against misinformation, and promoting evidence-based tactics on farm.

1. Awareness of how BTV-3 is transmitted as a vector-borne disease.
2. Caution against any misinformation, but instead view the latest facts.
3. Tactics on farm to help with midge control must be evidence-based.

Can I vaccinate my animals against BTV-3?

There is currently no vaccine authorised for use in the UK for BTV-3.

Vaccines available for other strains of BTV do not offer cross-protection, so vaccinating your animals against BTV-8 will not protect them from BTV-3, for example.

What do I do if I suspect one of my animals has BTV?

BTV is a notifiable disease, so if you suspect an animal is infected, you are legally obliged to report this. Failure to do so is an offence.

In England, you must report it to APHA on 03000 200 301. In Wales, contact 0300 303 8268. In Scotland, contact your local Field Services Office.

How is AHDB supporting me and the industry?

At the start of the incursion, AHDB facilitated the industry to create a collaborative communications strategy which focused on using vets as amplifiers of messages through Ruminant Health & Welfare (RHW). We created a hotline service, online information hub, hosted in-person and online events and posted social media updates in collaboration with RHW that provided a resource hub for farmers and the industry to get up-to-date, translated technical information on bluetongue.

AHDB will continue to take a leading role in bringing external groups together, working in partnership with other industry organisations to ensure that all levy payers receive timely and consistent information in relation to bluetongue.

Further information and support

For more frequently asked questions, visit the Ruminant Health & Welfare Bluetongue Hub:
ruminanthw.org.uk/bluetongue-virus

Find out if your holding is within a TCZ and apply for movement licences: gov.uk/guidance/bluetongue

If you are concerned about the personal or business impact of BTV, you can call the Farming Community Network on 03000 111 999 or the Royal Agricultural Benevolent Institution on 0800 188 4444.

You can call AHDB's bluetongue hotline on 024 7771 0386.

For further information, contact:

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BRITISH LAMB

TIRED OF



FEELING TIRED?

Did you know that lean British lamb naturally contains 7 essential vitamins and minerals?* These include vitamin B12, which helps to reduce tiredness and fatigue while supporting energy production, giving your health a hand.



LET'S EAT
BALANCED
FROM AHDB



*Lean lamb is naturally rich in zinc and vitamins B12 and B3, and is a natural source of phosphorus, potassium, and vitamins B5 and B6. Enjoy as part of a balanced diet and healthy lifestyle.

SUPPORT FOR FARMERS

From money matters to
mental health, help is at hand.

When faced with challenges, it's reassuring
to know that there are charities that you
can lean on for practical advice,
guidance and support.



For more information
on what support is available visit:
ahdb.org.uk/support-for-farmers

RABI[®]
helping farming people

FCN | THE FARMING
COMMUNITY
NETWORK

WHO WOULD
FILL YOUR
BOOTS?
FARM SAFETY FOUNDATION

NEWS & UPDATES

Diary dates

20 September – Talking Leaders: Sexy soils | AHDB

2 October – (Webinar) Bluetongue virus – October update

7 November – NSA South East Field Days – Making the most of grazed forage in your sheep system (Maidenhead)

15 November – Sheep Breeders Round Table conference

17 October – Talking Leaders: Thinking bigger | AHDB

Keep an eye on our events page for the most up-to-date information and details on how to book your place: ahdb.org.uk/events

Roots to Resilience

To find out more about Roots to Resilience and to sign up to our upcoming events, visit ahdb.org.uk/roots-to-resilience

Discuss the Undiscussabulls™ events

(See page 4 for more information)

AHDB welcomes Elaine Froese – a world leader in family communication, coaching and farm family transition management – to help run events, which will give attendees the skills to plan and develop their farming businesses, on the following dates.

- **21 October, Carlisle**
- **23 October, Harrogate**
- **25 October, Telford**
- **28 October, Huntingdon**
- **30 October, Exeter**

ROOTS TO RESILIENCE WORKSHOP

18–21 November – Roots to Resilience ‘Ranching for Profit’ course – Hollins Hall, Hollins Hill, Baildon, Shipley, Bradford BD17 7QW

AGRILEADER

Tuesday 1 October at 7:00pm live on all the AHDB social channels – AgriLeader Forum Circle livestream

We are launching the Forum 2025 with an AgriLeader Circle where you can hear from a farmer in your sector on how the AgriLeader Forum has helped their business.

We will be joined by Victoria Walmsley (Dairy), James Herrick and Ben Harman (B&L), George Tait (Pork), Tom Martin (Host), Anthony Pearce (C&O) and Graham Wilkinson (CEO, AHDB).

HAVE YOU SEEN OUR HARD-COPY PUBLICATIONS?

- In addition to our online information, tools and resources, hard-copy publications are available for beef and lamb levy payers in England. To order your hard copies, visit our website: ahdb.org.uk/co-publications



KEEP IN TOUCH



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