

The background of the entire page is a photograph of a rural landscape. In the foreground, a man in a green and black jacket and dark trousers is walking through a lush green field. To his left, a group of sheep with white wool and black faces are grazing. In the background, there are several large, mature trees with dense green foliage under a clear sky.

Delivering the future of farming


Your levy in action

Beef & Lamb sector plan

2022–2027

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A man with short grey hair, wearing a green and black jacket with 'betacraft' written on the chest, stands in a grassy field. In the background, several sheep are grazing. The man is smiling slightly and has his hands in his pockets.

“ The levy should be used to support the reputation of red meat, and all other work should be aligned behind that goal ”

Colin Bateman

A word from the Beef & Lamb council chair

The Beef & Lamb sector is facing a period of significant change. The levy is an investment in the future of your business and the industry. You asked for change and a fresh approach to how the levy is spent – one that delivers the best value for you and helps make your business more profitable.

In May 2022, AHDB invited every levy payer to tell them what work was most important. Thousands of you responded and the message was clear. The levy should be used to support the reputation of red meat and all other work should feed into that goal.

We now know how positively you feel about marketing campaigns, increasing access to export markets, and educating consumers. And all this post-farmgate work needs to be backed up by independent insight and evidence.

As a result of your views from the Shape the Future vote and the decisions of the sector council, AHDB will be asked to focus on:



There have been some difficult conversations and hard decisions to ensure the results of the vote have been respected and the work at AHDB delivers the best value. The plan below sets out what AHDB will do over the coming five years and is the beginning, rather than the end, of a conversation.

All the ways you can contact the sector council and the AHDB team can be found at the end of this document. We look forward to hearing from you.

Colin Bateman

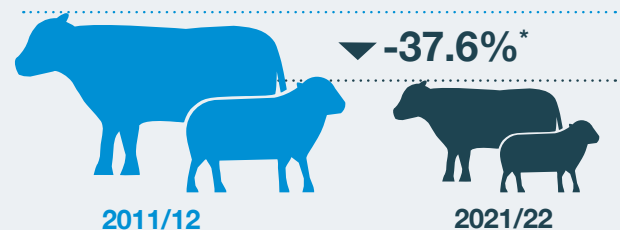
Chair of Beef & Lamb Sector Council

Purpose of the levy

The Beef & Lamb levy empowers all levy payers to act together to tackle challenges and opportunities that cannot, or will not, be addressed by individuals or commercial organisations alone.

Like many organisations AHDB faces financial constraints, meaning that we the sector council have had to make some hard choices about where we put your levy funds. The levy rate has stayed the same for over a decade. In addition, inflation and changes in AHDB's VAT status (meaning that we can no longer reclaim it) have all combined to reduce the available levy funds (from £15.4m this financial year to a projected £14.2m in 2023–24) for the sector council to invest on your behalf.

Effect of inflation on the spending power of your levy



*RPI inflation change over 10 years

Results of Shape the Future voting

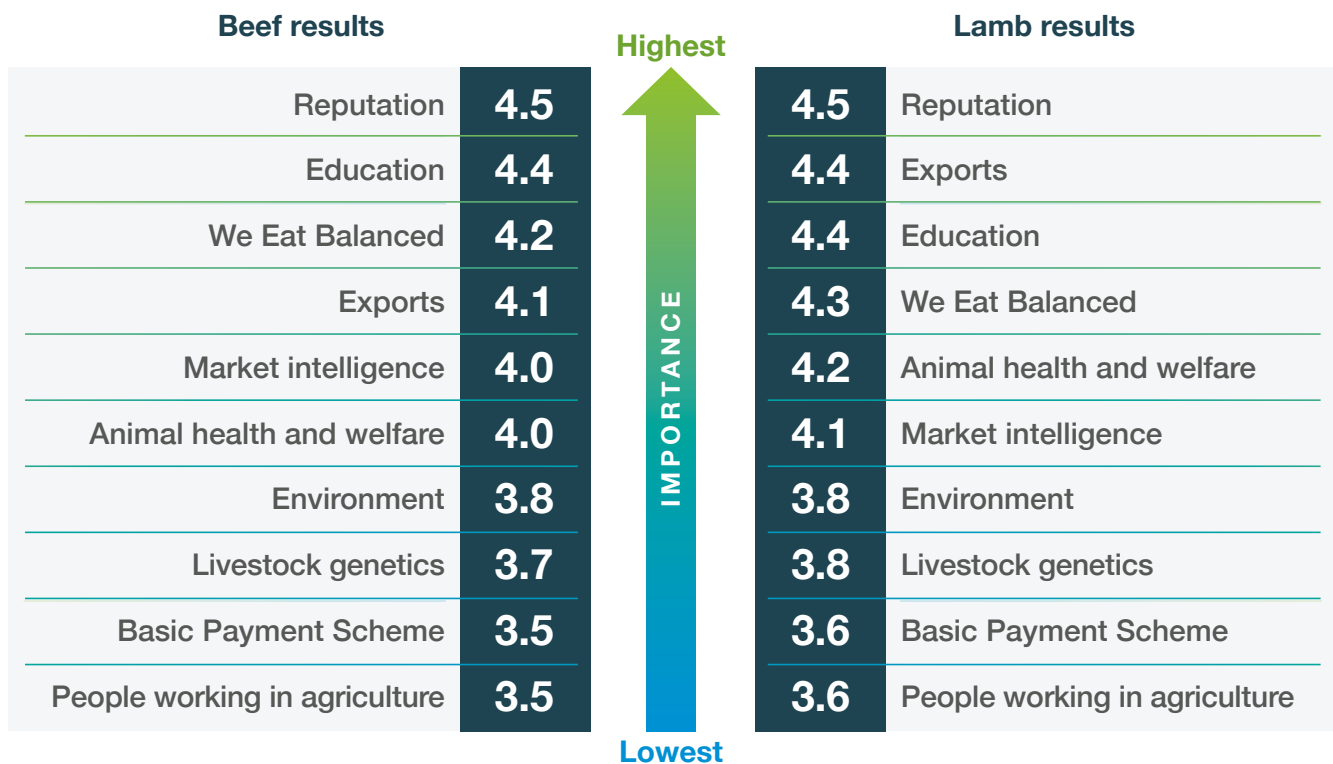
In April and May 2022, every levy payer was invited to have their say on how the levy was spent. This was the first step in delivering our promise to put you at the heart of everything we do.

Levy payers were asked to score on a 1 to 5 scale which areas of work were the most important to them. They also had the opportunity to post individual comments.

All areas of work achieved good scores. While lower scores were given to pre-farmgate areas (such as animal health and welfare, and the environment), the sector council recognises much of this work is vital to underpin the reputation of the sector and so must be preserved. For example, collecting data on antibiotic usage via the electronic Medicine Hub will be essential to defend the

sector against unfair criticism. Also, environmental data and evidence are used to inform consumers and government, and to rebuff mistruths about the sector's impact.

The sector council considered all comments submitted through the free text boxes in the Shape the Future vote. The most commonly expressed views supported prioritising the promotion of food and farming by AHDB.



Scale: 5 high (important) – 1 low (less important)





The five-year plan

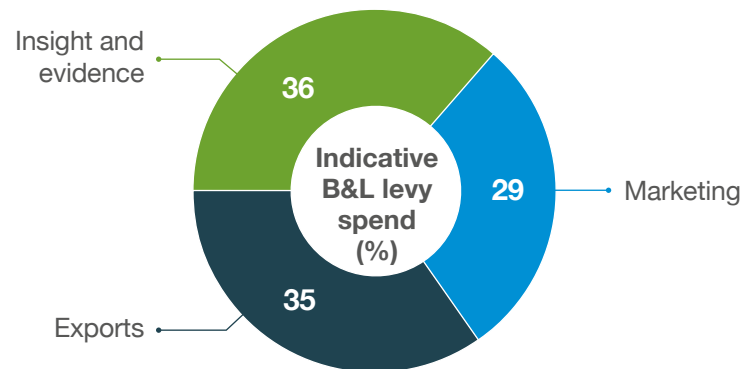
As a result of the Shape the Future vote the sector council has asked for considerable change in what AHDB does for the Beef & Lamb sector.

The most striking feature of this plan is that all work will be expected to protect or promote the reputation of the sector, either directly or indirectly.

Three core areas of work will support the overarching reputation aims:



Future levy distribution:



Marketing

Levy payers can only support the reputation of the industry if they have good opportunities to sell the beef and lamb that they produce at profitable prices.

The domestic market is incredibly valuable. Many foods are competing for shoppers' spend, and not just other meats. A positive consumer attitude towards beef and lamb is vital to sustain long-term demand.

The aim of this work is to protect long-term demand by championing beef and lamb as an excellent choice for consumers.

We will measure impact by sharing with you the pre- and post-campaign results showing how consumers' attitudes have shifted as a direct result of our marketing campaigns.

AHDB will:

- Continue the We Eat Balanced campaign, joining forces with other sectors to reduce costs and give greater impact to our work with consumers
- Deliver other highly visible targeted marketing campaigns across national TV, online, social and press
- Showcase our world-class farming standards to consumers, including animal health and welfare and environmental credentials
- Work with retailers to improve the shopping experience in the meat aisle

Exports

The more beef and lamb we can sell around the world, the better chance we have of getting the best value for the whole carcass and so support farmgate prices.

The aim is to increase market access and drive exports to underpin prices.

We will measure impact by sharing with you the number of markets open, the value and volume of trade, and the value that brings per head.

Currently those figures are:

Beef: 79 markets, 135,000 tonnes volume, approx £439m value, and a value per head of £164.

Lamb: 45 markets, over 73,000 tonnes volume, £446m value and a value per head of £35.

AHDB will:

- Continue to open new markets by collaborating with government and industry to realise new sales opportunities, including approval for sheep meat to Taiwan and the USA, and beef to China and South Korea
- Champion beef and lamb at international trade shows in target markets such as North America, the EU, Asia and the Middle East
- Host foreign buyers and governments seeking to approve and facilitate increases in access and trade
- Work with exporters to enable them to visit target markets and increase trade
- Support exports of beef and lamb in established markets by working closely with exporters

Insight and evidence

It is only possible to protect and promote the reputation of beef and lamb if we can provide evidence of excellent on farm practices demonstrated across our industry.

However, farmers can only employ the best techniques if they are aware of them, and they are profitable enough to adopt. AHDB provides independent insight and evidence to support farmers and, in turn, the reputation of the industry.

The aim of this work is to enable levy payers to improve their on-farm practices and gather data to support the reputation of beef and lamb.

We will measure impact by the profitability of the sector and scores from the Levy Payer Satisfaction Survey.

AHDB will work in the following areas:

Animal health and welfare

- Collect data to underpin the reputation of beef and lamb. For example, the use of antibiotics in the sector via AHDB's Medicine Hub
- Work with others to prevent or minimise the effect of any diseases, such as BVD and TB, which can affect the physical and economic performance of the herd, and the reputation of the sector

- Work with Defra to develop the Animal Health and Welfare Pathway

Environment

- Build on our existing knowledge and use it to help levy payers navigate changes to environmental policy
- Provide the best practical advice on techniques that will boost profits and minimise environmental impact
- Develop a roadmap to work with industry to develop and document shared objectives to benchmark the impact of beef and lamb production on the environment, and provide proof of continuous improvement
- Work with the industry to develop standard approaches and metrics where they are most needed
- Commission an independent review of the role genetics can play in reaching net zero, and consider how this can be optimised and funded

Market intelligence

- Supply price information
- Analyse cost of production and farm margins, including international comparisons
- Follow consumption trends that could impact on demand levels and standards of production
- Monitor emerging longer-term market signals that will impact on profits and the ability to compete at home or overseas
- Provide 24/7 access to all this information and other practical resources on an improved website



Reputation

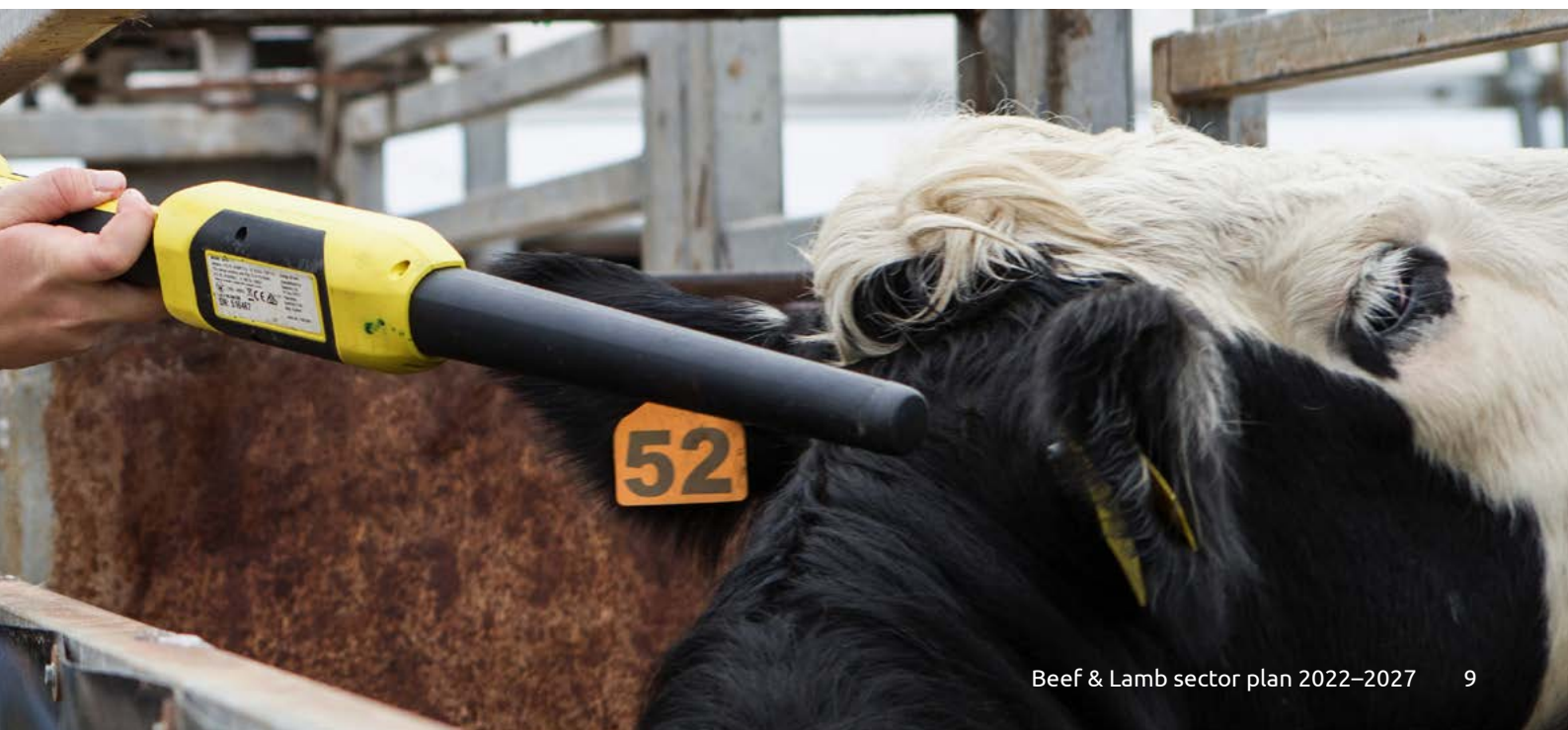
So, what do we mean by reputation? In consumers' eyes the hot topics are their own health, animal health and welfare, and the environment.

The aim of this work is to protect and promote the reputation of beef and lamb to consumers.

We will measure impact by annually gathering data about the perception of consumers towards beef and lamb.

AHDB will:

- Educate consumers of the future by working with the British Nutrition Foundation, supporting Open Farm Sundays, providing teaching materials for schools, and supporting Healthy Eating Week
- Promote the image of red meat in the media by stressing the benefits of eating beef and lamb and challenging misinformation
- Bring the industry together to tackle reputational issues, identifying the most effective messages to promote the industry while encouraging others to share them widely
- Provide expert spokespeople, case studies and the facts for the press and media
- Actively seek opportunities to promote the positive work of the industry and its benefits for wider society
- Respond to government consultations and address Select Committees using evidence to positively inform government policy decisions
- Inform policy development to ensure beef and lamb remain a key part of the Government's Eatwell Guide
- Remain alert to emerging reputational issues and policy direction



Work reducing or stopping following the vote

The sector council has acted on clear messages from levy payers to amplify our work on marketing, exports and reputation. Delivering this work, combined with a reduction in total income, means that hard choices have to be made and some work must be reduced or stopped.

There were lower scores in areas such as environment and animal welfare. While much of this is vital to underpin the reputation of red meat, we must not duplicate what others are already providing. Other areas, such as

transition from BPS and people in agriculture, will also be pared back. The council has asked AHDB to collaborate with government, industry, and others to consider alternative funding routes.

The sector council asked the AHDB team to:

- Prioritise work that supports reputation (including educating younger consumers), the domestic market and exports, and supports levy payers to make informed choices. The latter includes essential elements of animal health and welfare and environmental work, as well as supportive market intelligence
- Scrutinise all other work, eliminate duplications with others and optimise opportunities to collaborate
- Ultimately, ensure that all work supports optimising the reputation of beef and lamb

Your council – next steps and contacting us

AHDB is committed to putting the levy payers at the heart of everything we do.

In doing so, you will have an active, field-based Engagement team who will work alongside you, industry experts and key stakeholders. Their specific talents, insights and enthusiasm to work across the industry will provide the essential connections between our organisation and others whom we need to collaborate with to achieve our aims. As a pivotal point of contact and by using various methods of engagement, the team can share insights and evidence that is not available anywhere else in the industry.

To receive regular updates, online and at events, register now to stay in touch at ahdb.org.uk/keeping-in-touch

Keep talking

Contact the Engagement team via ahdb.org.uk/beef-lamb-engagement-team

Contact a sector council member at ahdb.org.uk/beef-lamb-council

For all other enquiries, email us at info@ahdb.org.uk

Who's who in your sector council 2022



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