

# Overview of Meat Plans and Programmes for 2020

**Joe Burke, Senior Manager:  
Meat & Livestock**

**BORD BIA**  
IRISH FOOD BOARD



# Outline

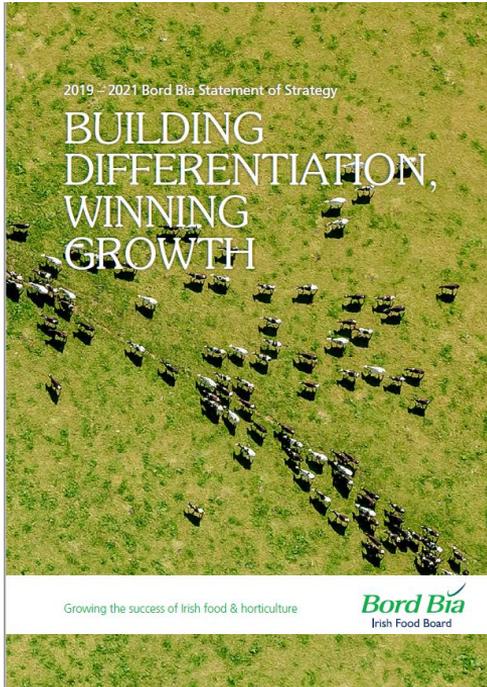
Recap on Strategic Goals

Meat Plans for 2020

Key initiatives by species



# Bord Bia Statement of Strategy



## 4 Strategic Priorities

1. Driving Success & Growth in the Market
2. Insight to Power Growth
3. Building Reputation for Growth
4. Leading through People

# Strategic Vision for Irish Meat

*Maximising the value returned from the marketplace by making Irish meat the preferred choice of the world's best customers through the delivery of verifiable selling points and consistently excellent quality*

# Strategic Goals for Meat

## Deliver Value & Volume Growth

Grow share in  
Priority  
Markets

Increased  
Partnership  
with Key  
Customers  
Globally

Differentiate  
Irish Meat  
through  
Robust,  
Verifiable  
Proof Points

Grow  
Awareness &  
Preference for  
Irish Meat in  
Priority  
Markets

# Delivery focused on priority markets and customers



	Beef	Pigmeat	Lamb	Poultry
Established Markets	Germany Italy Netherlands United Kingdom	Ireland	Germany Belgium Nordics France	Ireland
'New' Markets	China Japan Hong Kong South Korea	China Mexico Ukraine	USA China Japan	China South Korea

**Activity in other markets focused on key customers**

An aerial photograph of a lush green landscape. A stream flows through the center, bordered by trees and shrubs. In the foreground, a herd of cows is grazing in a field. The background shows a large field with several concentric green circles overlaid on it. The text "2020 Meat Plans by Strategic Priority" is centered over the image in a large, white, sans-serif font.

# 2020 Meat Plans by Strategic Priority

# 1 Driving Success & Growth in the Market

SUPPORT

Market Preparation

SERVICE

Lead Generation & Market Activation

REL'SHIP  
MGMT

QUALITY

Strategic Partnerships

SALES



# Meat Initiatives by Programme, 2020

## Market Preparation

Lean Programme - Pigmeat

Market Access Inspection Visits

Strategy Development – Lamb (US & China)

Commercial Marketing Strategy

Brexit Workshops – Customs & Supply Chain

# Lean Pigmeat Producer Programme

Lean Start/Plus Programme

30 participants

Overseas centre of excellence visit

Collaboration with Teagasc



# Sheep Meat - Market Entry Strategy



## News

FARMERS WEEKLY - farmersweekly.co.nz - October 7, 2019 5



RISK: Methane and carbon dioxide targets could besoop primary production and the national ability to provide well-being to citizens, the Meat Industry Association says in its annual report.

## US leaps up sheep meat ladder

Alan Williams

alan.williams@fwdaily.co.nz

THE United States, which pays the best prices, has become New Zealand's second biggest sheep meat market.

Conversely, it is no longer NZ's biggest beef customer, that honour now going to China. The average value of sheep meat exports there in the year ended June 30 was \$17.79/kg, with total sales worth \$456 million on volume of 25,691 tonnes.

Year-on-year growth in the US market was 2.4% by value.

The US trade biggest customer China by a big margin last year will over twice the amount for product, the Meat Industry Association says in its annual report.

China continues as the main market, taking 51% of exports by volume at 263,953t and 39% of exports by value, at \$1.38 billion. Chinese imports increased 39% in value year-on-year with product prices at an average \$6.77/kg, just 38% of what the American pay.

And US imports of NZ beef fell 17% by value while China's imports jumped nearly 50%.

The US passed the United Kingdom as the second biggest

year, exports there falling by 16% to 42,030t, the lowest figure in a 12-month period and less than half the volume of exports there a decade ago, MIA says.

The value of exports fell by a smaller amount, 12% to \$417m, with an average price of \$9.72/kg.

Despite the fall the UK remains NZ's most important market for high-value chilled cuts at 26% of total chilled sheep meat exports for a value of \$277m.

Germany, \$263.2m, and the Netherlands, \$238.7m, are the next biggest individual country markets overall but down 16% and 23% respectively on a year earlier. Brazil has affected NZ sheep meat exports to both the UK and the rest of the European Union as part of an international trade environment that continues to be in flux, MIA chairman John Loughlin and chief executive Tim Ritchie said.

"We are still grappling with what Brexit will look like and how it might impact access."

The wider UK and EU remain very important to the NZ sheep industry with France, \$165.6m in sales, and Belgium, \$81.7m, also among the top country customers, meaning five of the top 10 are from that region.

and UK plans to split the NZ sheep meat quota in half in post-Brexit planning. That is contrary to NZ's long-held right, NZ is willing to look at creative solutions to maintaining its position, Loughlin and Ritchie said.

“These targets are contrary to science-based policy and not credible given the short-lived nature of methane.”

John Loughlin  
Meat Industry Association

Despite these issues growth in China and the US more than offset UK/EU weakness so total sheep meat exports edged out a 1% gain to just under 400,000t year-on-year.

The industry here is determined to find a Chinese approach for all NZ meat companies to be certified for exports of chilled sheep meat and beef products to

been made since 10 plants owned by six companies were registered more than two years ago.

"This continues to cause frustration and an unhelpful playing field for member companies as not all are able to take advantage of the opportunities in the market."

There are other unaddressed issues including access for processed meat products, pet food and raw material for further processing.

Beef exports to China rose 73% to 171,173t, and overtook the US as the biggest market.

By value it took in \$1.2b of product, an 89% lift, with the US down 17% at \$1.095b. The volume to the US was the lowest since 2000-11.

China also became the biggest market for chilled beef, at 970t from just a small number of plants approved for chilled exports, highlighting the importance of widening access for NZ plants, Loughlin and Ritchie said.

They single out climate change as the major challenge for the meat industry as the Government pushes ahead with the Zero Carbon Bill.

Most of the legislation in question seems best they are

targets, which have the hallmarks of a messy political compromise.

"These targets are contrary to science-based policy and not credible given the short-lived nature of methane."

That and the net zero target for carbon dioxide by 2050 have the potential of jeopardising the primary sector.

"This will ultimately impact our national ability to provide well-being to our citizens."

The primary sector has world-leading, innovative, high-tech, complex production and manufacturing businesses producing food for global customers and delivering real and tangible benefits to regional NZ and the wider economy.

MIA accepts that from 2025 farmers will individually pay a price for their measured greenhouse gas emissions but to be effective pricing will have to be at the minimum level to being about behaviour change and uptake of new technology and to ensure farmers pay only where emissions are truly creating increased warming.

The primary sector has made a collective commitment to responding to climate change and promised \$20m a year to do the

46%+  
Growth in Sheep  
Meat Imports  
since 2013

2018 Sheep Meat Imports  
124,873 tones

Market Share  
Australia 78%  
New Zealand 21%

Source: Farmers Weekly New Zealand/GTIS

# Meat Initiatives by Programme, 2020

## Lead Generation & Market Activation (All Meats)

Trade Fairs

In-Market Lead Generation

Inward Buyer Visits

Trade Missions

In-House Trade Shows

Meat Academy/CIBC

# Trade Fairs

食品安全与可持续性领域的佼佼者

食品安全

European Beef and Lamb – Excellence in Food Safety & Sust



# In Market Lead Generation Events



In Market Staff  
Lead Generation

Targeted events

Board  
Follow Up

20 in-market lead generation events planned for 2020



Inward Buyer Visits, 2020

25 planned across all major markets



## Ministerial Led Trade Missions 2020

China – Philippines – Vietnam – Thailand - Algeria – Egypt



## In-House Trade Shows

Raise awareness of Irish meat throughout the Customers Meat Teams

Raise awareness of key differentiating factors: Sustainability, Taste, etc.

# Meat Academy



Highly effective means of B2B communication

Building Supplier - Customer – End User relationship

Opportunity to communicate specific targeted messages

Encourages trial/purchase



# Strategic Partnerships



# 2 Insight to Power Growth

Brand Development

Consumer & Cultural Insight

Market Insight & Information

Strategy & Planning

Trends, Foresight & Innovation

THE  
POWER  
OF  
INSIGHT

# Brand Development



**Bespoke Brand  
Development  
Service**

# Meat Initiatives by Programme, 2020

## Consumer & Cultural Insight

European Meat Shopper Tracker

Dietary Lifestyle Trends

Q Mark Health Check Ireland

Q Mark Campaign Tracking

# Meat Initiatives by Programme, 2020

## Market Insight & Information

Consumer Panel Data Ireland

European Meat Panel Data

China Foodservice – Beef & Lamb

German & UK Foodservice (All meats)

Market Insights – US & Ukraine mkts

# Interactive *Power BI* data on [bordbia.ie](http://bordbia.ie)

## Beef Market Tracking

### R3 Prime Male Cattle (€/kg Deadweight excl. VAT)



The table shows the average prices recorded for R3 prime male cattle in Ireland, the UK and across the EU for the most recent available week, and the equivalent week in the last 2 years.

**Euro Price for the Most Recent Week and Same Time Last Year (€/kg deadweight, excl. VAT)**

Country & Type	Saturday 30 December 2017	Saturday 29 December 2018	Saturday 28 December 2019
IE Steers	€ 3.94	€ 3.70	€ 3.55
UK Steers	€ 4.17	€ 4.00	
EU Young Bulls	€ 3.99	€ 3.76	

The graph below shows the average weekly prices recorded for R3 prime male cattle in Ireland, the UK and across the EU. The timeline is displayed on a weekly basis and includes prices from 2014 up to the most recent available week.



# 3

## Building Reputation for Growth

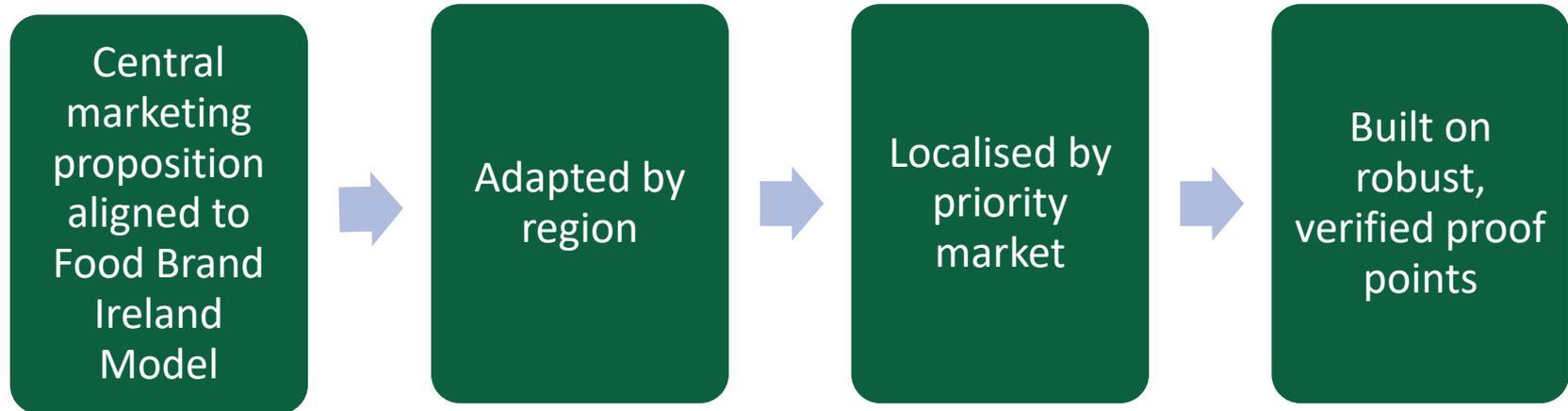
*Driving the functional and emotional differentiation of Food Brand Ireland*

**Building Awareness in NEW markets**

**Building Preference in EXISTING Markets**

**Defending & Building Preference in IRELAND**

# How will *Food Brand Ireland* influence our marketing campaigns for Irish meat?



# BRINGING THE NEW PROPOSITIONS TO B2B TARGETS

## Established Markets

## BEEF PROPOSITIONS

## New Markets

I choose to source Irish beef because it is prime quality, produced primarily from steers and heifers by farmers who are part of a national quality and sustainability programme and are independently audited. Irish beef is a naturally tasty product which is valued by my consumer.

I choose to source beef from Ireland because I can trust it as a source of high quality and safe beef. It is produced in a way that meets the high food safety standards in the European Union and this is driven by the Irish government. Irish beef is naturally nutritious which is valued by my consumers.

## BEEF COMMUNICATION PILLARS



Open space



Sustainability



Grass fed



Trust & Transparency



Tasty, high quality Beef

BOEUF  
Le goût d'u

Een hemels kers  
voor iedereen.

来自欧洲的盛宴

爱尔兰牛肉18年重返中国

Qui si  
pascola  
in libertà

## B2C Irish Beef campaigns – Priority EXISTING Markets

- To support and build sales of Irish beef
- Drive preference by increasing awareness of its distinctive benefits.

Focus on retail & foodservice:

- Germany
- Italy
- Netherlands

www.boeuf-irlandais.com  
www.agneau-irlandais.com

Deel de smaak va

Rundvlees van topkwa  
al in de keuken: het is n  
hemel gaat helemaal o  
beweging zijn, ervaar je  
Meer weten? Laat je ins

Unsere Qualität

mit John Griffin

Outdoor

Online

Press

In-Store

Radio

“翡翠岛”广袤牧场

坐落于北纬53°，  
被大西洋暖流环绕，  
空气纯净，雨水充沛，牧场丰茂，  
拥有全球可持续发展的天然草场，  
80%的农业用地被绿草覆盖。

肉 天然健康  
坚持天然放牧方式

- 户外散养牧放  
每头牛约有300天的超天然放牧时间，草料是在纯净自然环境中生长的爱尔兰天然牧草。
- 草饲健康  
爱尔兰牛肉色泽红亮，脂肪较少，不饱和脂肪酸过多。
- 口感鲜嫩  
肉质拥有迷人口感和嚼劲，感受鲜美的肉汁从齿间慢慢溢出。

Alan conosce  
i suoi manzi  
uno per uno

La carne di chi ama  
la carne



www.irish-beef.it

# Chef's Irish Beef Club



9 markets, 90+ Chefs

Belgium, Britain, France, Germany, Italy, Netherlands, Sweden, Switzerland and UAE

Elevate public perception of Irish Beef as being a world class sustainable grass fed product



- ✓ **23 journalists and 4 influencers** attended the event
- ✓ **5 interviews** arranged with the Chefs
- ✓ **15 articles** generated to date November 14th
- ✓ **44 posts** on Instagram and Facebook
- ✓ **76 IG stories**



# Beef B2B Campaign – Priority ‘NEW’ Markets

## Increase sales of Irish beef in China

- Focus on importers/distributors of beef into the foodservice sector
- E-commerce platforms

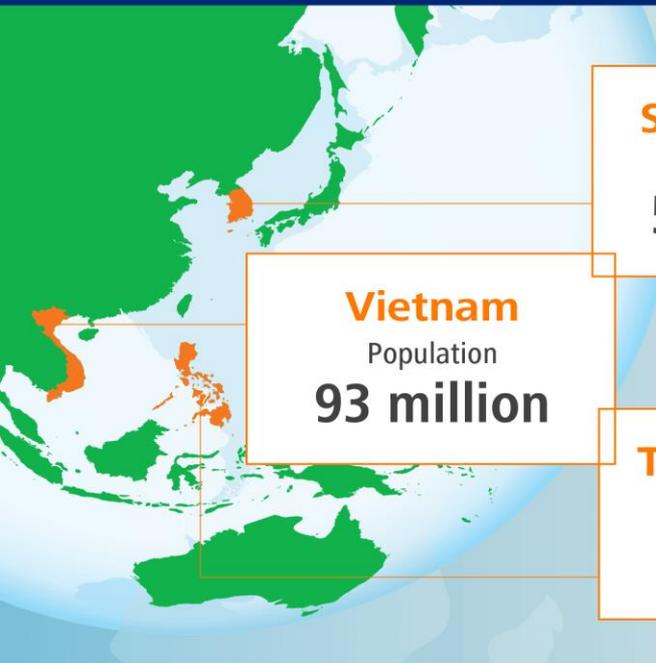
## Increase sales of Irish beef in Japan

- Target beef importers and food manufacturers.

EU CO-FUNDED

# €3.95m Pork & Beef Campaign

Targeting Key Asian Markets (2019 - 2021)



## South Korea

Population

51 million

## Vietnam

Population

93 million

## The Philippines

Population

103 million

## CAMPAIGN OVERVIEW



### 540 Key Decision Makers

from trade and government level will attend Technical Seminars.



### 300,000 Buyers

accessible to meat exporters through 9 International Trade Shows in the region.



### 1,000+ Asian Journalists

will receive press packs and news releases throughout the campaign.



### 630 Days of Inward Study Visits

with 90 overseas trade representatives visiting farms and producers in Ireland.



### €700,000 Digital Campaign Investment

to an audience of 250 million in the key 3 markets.



### East Meets West - Masterchef Cook Off

will engage with over 150 of Asia's Top Chefs to endorse European Pork and Beef.



CAMPAIGN FINANCED  
WITH AID FROM  
THE EUROPEAN UNION

EU CO-FUNDED

# €3.82m Pork and Poultry Campaign

Targeting China & Mexico (2020-2022)

## CAMPAIGN OVERVIEW



Digital & Social Media



Communications



Trade Shows



Trade Seminars



Cooking Demonstrations & VIP Event



Inward Study Visits



Knowledge Transfer Visits



# Year 3: EU Lamb Campaign – Try It Love It

Ireland

France

Germany

UK

# L'AGNEAU

L'essayer, c'est l'adorer

ENJOY  
IT'S FROM  
EUROPE



CAMPAIGN FINANCED  
WITH AID FROM THE  
EUROPEAN UNION



# Q Mark Ireland - Pork & Bacon/Ham

## Objectives

- Increase market share of Quality Assured ham & bacon
- Increase consumption of pork.

## Target Audience

- 30-60 yr female shoppers

## Message

- Choose ham and bacon with the Quality Mark and enjoy it more because you can **trust** it.
- Buy QA pork more often as it is **versatile**, delicious and easy to prepare for everyday & weekend meals



### Key Activities

TV Advertisement

Video on Demand

Digital Media - Social, Search

PR Activities

# Q Mark Ireland - Poultry

## Objective

- Build and drive home market preference for Quality Assured Irish poultry

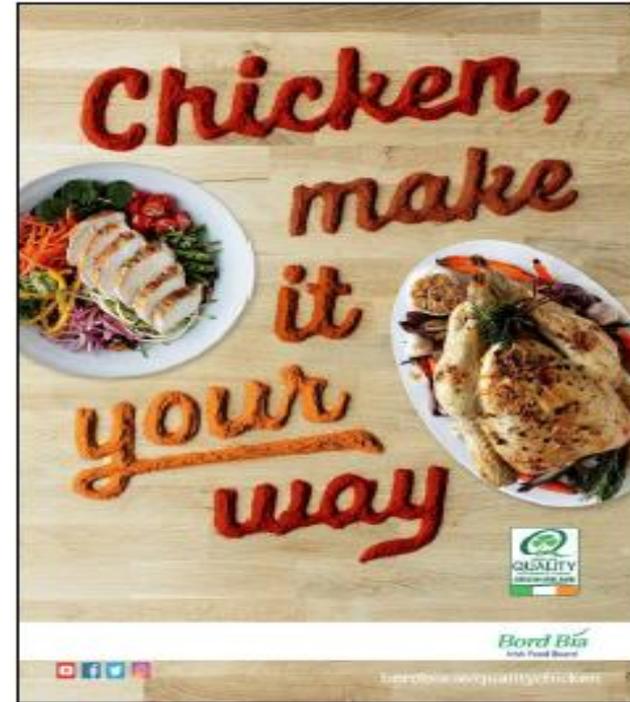
## Target Audience

- Pre and young families

## Message

- Buy QA chicken more frequently as it is a reliable and **versatile source of protein** to prepare for everyday and weekend meals

Activities incl: TV, PR, Digital, Social, Outdoor



# Q Mark Ireland – Lamb

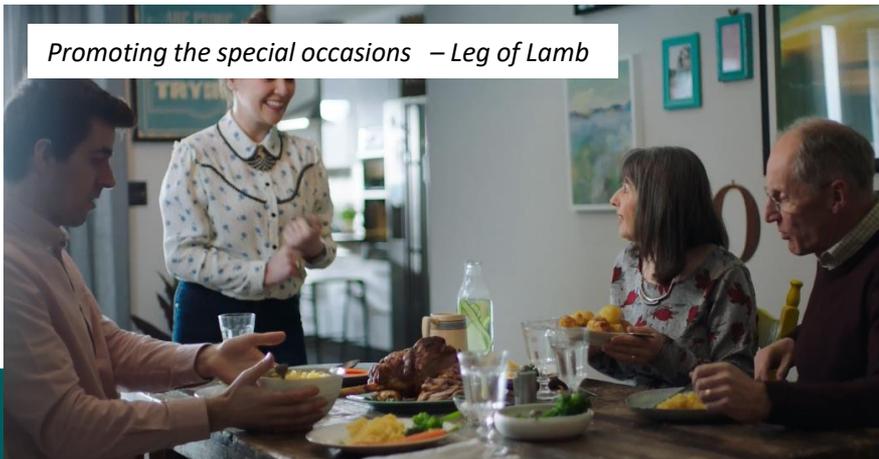
*Promoting Convenience – Lamb Stir Fry*



*Promoting Versatility – Lamb cutlets for the BBQ*



*Promoting the special occasions – Leg of Lamb*



*Promoting Quality Assured Lamb*



# 3

## Building Reputation for Growth

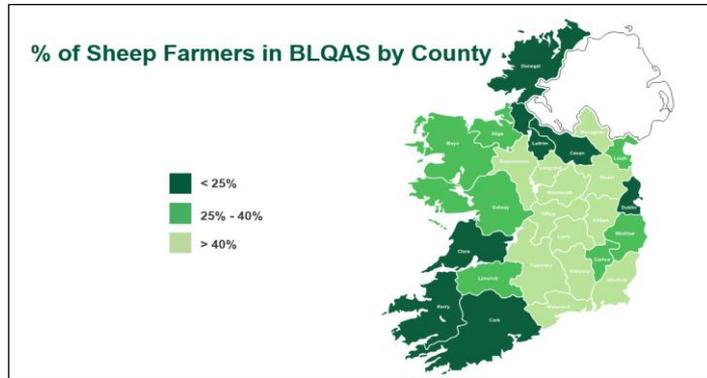
*Driving the functional and emotional differentiation of Food Brand Ireland*



Providing Proof

# Quality Assurance infrastructure is key to delivering proof points

A Challenge for Sheepmeat ~ 55% currently



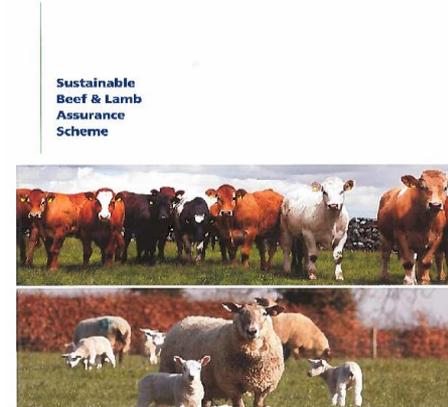
SBLAS Membership

	2015	2019
Total	12,541	11,487
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<i>of which</i>		
- Beef & Lamb	9,995	9,380 (-615)
- Lamb only	2,546	2,107 (-439)

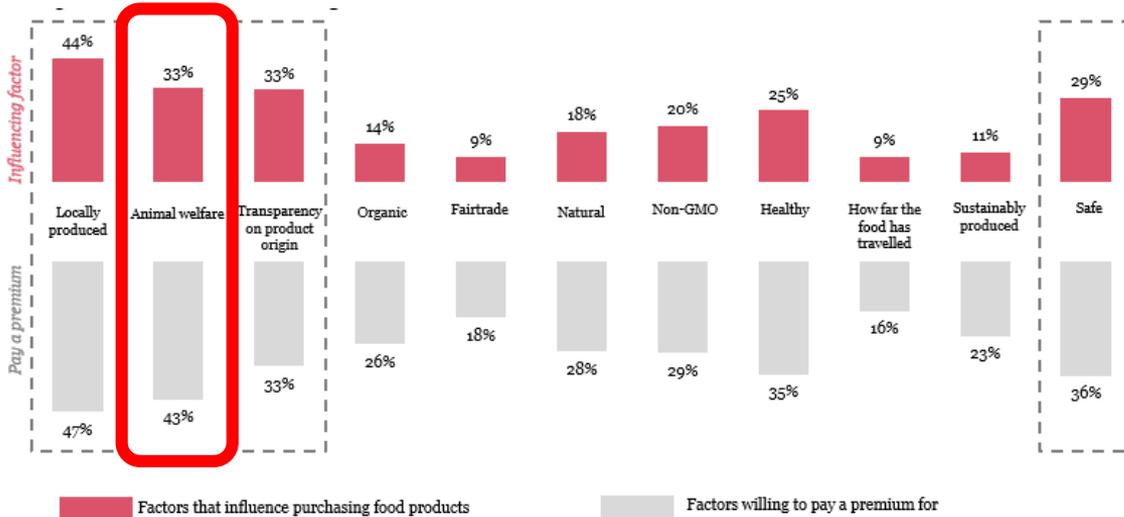
Target = Increase participation for lamb to 90% of national throughput from SBLAS flocks

# Grass Fed Standard for Beef

Development work is advanced regarding an accredited Standard to verify the percentage of an animals diet that consists of grass



# Animal Welfare Standard



Animal health & welfare standard for all livestock systems

Bord Bia Animal Health & Welfare Working Group

Technical Advisory Committee Sign off

# 4 Leading through people

*Fostering an entrepreneurial culture and skills*



Smurfit Executive Development  
UCD Michael Smurfit Graduate Business School



## Enhanced involvement in Meat sector

**Marketing Fellowship 2019/2020 = 6 projects in 5 markets**

**Origin Green Ambassadors 2019/2020 = 40% meat placements**

**Supply Chain = Focus on key meat accounts**

# Overview of Meat Plans and Programmes for 2020

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