

INTERNATIONAL
MEAT SECRETARIAT

WORKSHOP

Economic issues facing the global meat industry

Subjects for discussion include:

- The impact of the current global economic crisis
- Environmental challenges
- Structures and strategies
- Global trading development



INTERNATIONAL

Oficina Permanente

MEAT *Office International*

Internacional

SECRETARIAT *de la Viande*

de la Carne



20–22 April 2009

at the

**Hotel de Wageningse Berg
Wageningen
Netherlands**

The Objectives of the first IMS International Economics Workshop

Comment from the Workshop Chairman

The objective of this Workshop is to explore economic issues of key importance to the meat industry. These issues are increasingly global – and have implications for all our industries in one way and another. This Workshop provides an ideal opportunity to discuss and, where possible, reach conclusions which will be of value to our respective industries and companies. Those attending will be analysts, economists and experts with a knowledge of the meat and livestock sector. Our discussion and debates will take place in a professional and rigorous manner; however, at the end of the day we will be seeking answers and solutions not merely having an academic discourse! I hope you will join us in Wageningen; if so, please complete the registration form and return to us.

Bob Bansback

Programme

Monday 20 April 2009

11.00 – 12.00	Delegates arrive at Workshop venue - Hotel de Wageningse Berg, Wageningen.
12.00	<i>Midday • Buffet lunch</i>
12.50	Opening of Workshop by Patrick J Moore, President, International Meat Secretariat.
13.00	Session 1 • Presentations from country delegates. Brief contributions will be made by country delegates – relevant data having been requested in advance under a common format. The focus will be on any key recent strategic developments in the country concerned. Depending on the number of contributors, the sessions may have to be split by species.
<i>Mid afternoon</i>	<i>Coffee break • Continuation of session 1</i>
18.30	<i>End of session 1</i>
19.30	<i>Dinner in hotel • Guest speaker: Professor Ruud Huirne, Managing Director, Agricultural Economics Research Institute, Wageningen. 'Latest Economic Research on Livestock and Meat at Wageningen'.</i>

Tuesday 21 April 2009

7.30 – 8.30	<i>Breakfast in hotel</i>
9.00	Session 2 • 'The Global Economic Situation and Implications for the Meat Trade'. Introductory presentation by Loek Boonekamp, Special Adviser to the OECD Director for Agriculture, Paris. Over the past year, the economic environment for the international meat markets and trade has changed considerably. The financial crisis has led to a credit crunch affecting investments and trade. Currency fluctuations have been more volatile. Global economic growth is slowing and many countries have entered or are facing recession. Oil prices have declined dramatically with implications for the profitability of biofuel production, demand for feedstock and prices for feed. Some of these changes are short-term but others will remain for several years. The opening presentation will discuss these factors and analyse their impact on meat production, consumption and trade. Workshop participants will then be invited to comment on experiences in their own countries/regions.
10.30	<i>Coffee break</i>
11.00	Session 3 • 'Strategic and Structural Changes in the Global Meat Industry'. Introductory presentation by Richard Brown, Director GIRA Meat Club. The meat industry is becoming more global. The poultry industry has led the way but pigmeat and now the beef sector is moving in the same direction. What are the key driving forces behind this?

What are the key constraints that may dictate the pace and the shape of change over the next few years? What is the role of institutional and global trading factors in these changes? To what extent do cultural factors represent major barriers to be overcome? Finally, what strategies are being deployed by meat companies in their domestic and export markets? Following the introductory presentation covering the global perspective, a case study from a European country will be presented prior to participants contributing from their own country perspectives.
(Session scheduled to finish at 12.30).

13.00

Buffet lunch in the hotel

14.00

Session 4 • ‘Environmental Issues and their Impact on the Meat Sector’.

Introductory presentation by Pierre Gerber, Livestock Policy Officer, FAO, Rome – a co-author of the FAO Report ‘Livestock’s Long Shadow’.

The FAO Report highlighted some basic challenges for the meat and livestock industry stemming particularly from the need for climate change and global warming issues to be addressed globally. What are the priority areas and what steps can be taken to mitigate greenhouse gas emissions? How has the global economic crisis affected the priority which will be given to environmental issues? The introductory paper will address these subject areas. A contribution will then be made by Dr Ge Backus from the Animal Systems Division, LEI, Wageningen, spelling out positive steps that are being taken by some sectors of the livestock industry and further steps that can be taken. There will be a break-out session into groups which will then report back on conclusions from different countries to this.

15.30

Coffee break

16.00

Session 5 • ‘Future Global Trading Patterns for meat with or without a Doha Agreement’.

Introductory presentation from Flavio Coturni, Head of Agricultural Trade Policy Analysis Division, Directorate General for Agriculture and Animal Development, EU Commission.

Future patterns in World trade are not just influenced by price competitiveness and comparative advantage. They are seriously influenced by world trade agreements and bilateral arrangements. If the Doha Round is not concluded in the near future, there are likely to be bilateral arrangements concluded with important implications for trade flows. There may also be legal challenges, which have been left in the sidelines while the Doha Round negotiations have been taking place. The introductory presentation will cover these points from an EU perspective. This will be followed by contributions from the US and South America. There will then be a round table discussion for all participants (Session to conclude by 18.00).

19.00

Pre-dinner reception

19.30

*Dinner • Guest speaker: A Director from the VION Food Group***Wednesday 22 April 2009**

7.30 – 8.30

Breakfast

9.00

Departure for local visits to farm enterprises

10.45

Return from visits • Coffee break

11.15

Session 6 • Summary of Workshop conclusions

A small group will have worked up a summary of the key conclusions from the previous 5 sessions. Workshop participants will seek to reach a consensus on the conclusions to be put out in the Workshop report.

12.00

Session 7 • Review of Workshop and future plans

A summary of the views put forward in the questionnaire which will have been circulated prior to the Workshop. This will be followed by a discussion on the future of the group.

13.00

End of workshop • Buffet lunch served in the hotel