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IMS Economics Webinar: Key Issues for Global Meat and Livestock Sector

The 21th IMS Economics Webinar in March attracted forty-seven participants from multiple time zones. It provided an opportunity to assess some of the key issues affecting the global meat and livestock sector.

Presentations were made by Richard Brown, Director of the GIRA Meat Club and Justin Sherrard, Global Strategist Animal Protein at Rabobank. The focus of presentations and discussions was on the prospects for 2024 with an emphasis on the global trading situation and an assessment on how sustainability policies were impacting meat economies in key countries.

IMS Secretary General, Hsin Huang, was hosting the webinar for the last time and IMS Economics Chair, Erin Borror, thanked him for all his excellent support for the Economics Webinars and Workshops over the years as well as for his work for the world meat industry in general. She was also delighted to welcome the new IMS Secretary General, Phil Hadley, to the Webinar.

2023 a Less Disruptive Year for Meat Companies than 2022 - but still Challenging

Richard Brown started by highlighting the many factors that influenced the global livestock and meat sector in 2023 and were likely to continue to be influential in 2024. In relation to 2023 he indicated that overall, there had been less disruption than in the previous year although it had still been a challenging time, particularly for those involved in international trade.

Over the past five years the impact of Covid on the world economy and the aftermath of the African Swine Fever (ASF) outbreak with its outcome for pork production in China had left a lasting impact on the global meat economy. Other factors mentioned included:

- The slower than expected recovery in import demand from China, which was critical as China now accounted for a third of all world meat imports.
- The strong upward movement in world animal feed prices; although these peaked in mid-2022 and declined significantly since then, these major fluctuations are making livestock producers cautious about expansion out of concern for possible future price hikes at a time of political uncertainty.
- Some recent greater resistance to sustainability measures in some countries; this has partly resulted from market prices not increasing in line with production costs putting pressure on producer margins. Notable has been the strong farmer reactions in some EU countries which could have an impact on the speed with which the European Green Deal measures could proceed.
- The fact that elections are taking place in a large number of countries in 2024, with particular significance attached to the US Presidential election.
- The concern about the potential impact of HPAI in Brazil, now the world's major meat exporter, in the event of its spread to Brazilian commercial poultry flocks.
- Other factors mentioned were: *fluctuations in value of the US$; uncertainty on future energy costs* and *'anti meat' pressures*, particularly in Europe.

Looking ahead, he proceeded to touch on three areas of potential political instability. Firstly, the war in ***Ukraine*** with its implications for agriculture and trade. Although export routes for Ukraine's cereal products were being found to be more satisfactory than in 2022, particularly through the EU, the price obtained remained low.

The trade was also causing adverse reactions in some EU countries, notably Poland. In relation to the ***Israel/Hamas*** war, there is a potential for a wider spread of instability,

although so far there has been no oil shock or full-scale regional escalation of hostilities. Even so, according to the Drewry container index, freight rates for containers had doubled since the Houthi operations in the Red Sea as companies had been forced to take safer, but more expensive, trade routes.

Finally, there are rising tensions between ***China and Taiwan***; China openly states its long-term goal of reunification and this could create potential for future trade disruption. At present, China is displaying signs of 'being patient.' Nonetheless, President Lai Ching-te won the Taiwan election in January on a pro-independence stance.

Lower Meat Consumption Growth Forecast up to 2028

Looking to longer-term trends, ***consumption*** growth between 2018 and 2028 is forecast by GIRA to rise at an annual rate of only 1.6% - far lower than in previous decades.

Poultrymeat consumption is predicted to show the greatest rate of increase over this period, at +2.1%. Sheep and goatmeat is also forecast to rise by almost 2%. The increase for beef and veal, however, is expected to be only 0.9%. Pork consumption in 2028 is projected to be at about the same level as in 2018 but it should be remembered that it is recovering from its low point in 2020 when pork supplies dropped sharply due to ASF-induced herd reductions, particularly in China and other Asian markets.

Major Slowdown in World Trade over the next 4 Years

The rate of increase in world meat ***trade*** has slowed significantly since 2020 compared with the strong growth in the 2010 - 2020 period. According to GIRA, estimated total trade increased by 36% between 2012 and 2020, whereas further growth of only 6% is forecast between 2020 and 2028. In relation to ***short-term trends***, notable developments were the forecast decline in imports into China - particularly for pork and poultry; also, lower beef imports into Japan and Korea.

By contrast, increased beef import volumes were predicted for Mexico and the US. In relation to exports, increased amounts of beef and lamb from Australia were forecast as well as higher volumes of poultrymeat from Thailand and beef from India. EU pigmeat exports were expected to decline further. In addition, a notable feature was the emergence of Russia as a significant exporter of pork.

Justin Sherrard concurred with many of Richard's comments on world markets and the potential importance of the HPAI situation in Brazil. China remained critically important in world trading trends and its cautious import performance in the early part of 2024 was of concern to many major exporting countries. Despite the various uncertainties, global trade remained critically important for many countries in the longer-term in view of its vital role in carcase balance as well as in food security.

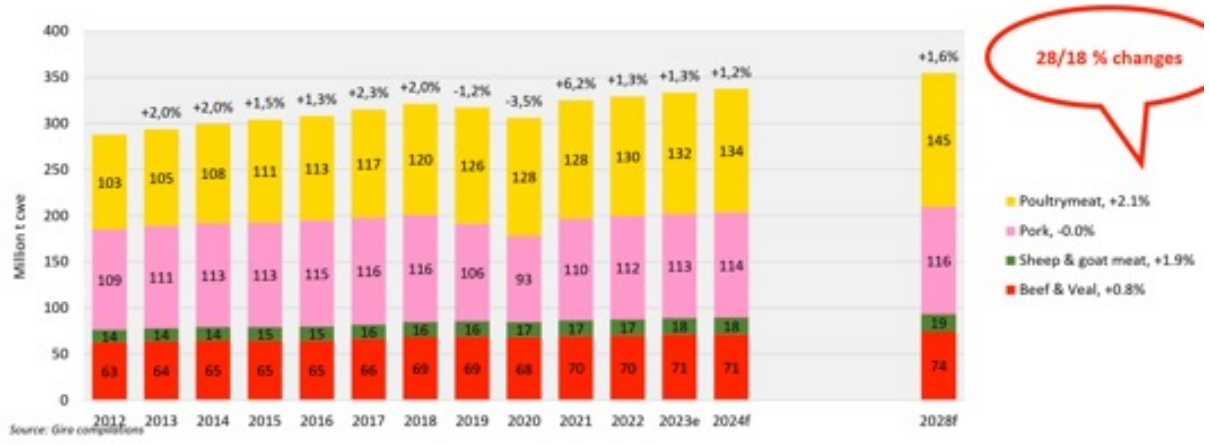
Brazil Remains Dominant Meat Supplier to China

Turning to ***beef***, the imports into ***China*** were plateauing at present and reflected the period of 'soft' consumer confidence. Brazil was increasingly the dominant supplier, but it was noticeable that ***Australia*** was increasing its exports after a period when China had imposed restrictions on some meat plants.

The Rabobank forecasts indicated that the current phase of the cattle cycle would result in the ***US*** becoming a growing net beef importer up to 2025, although this was nothing new and reflected the build-up in the US cattle herd. He noted that although ***Brazilian*** beef consumption had been declining in recent years at the same time as exports were growing, it was feasible to expect growth in both exports and consumption in future years.

In relation to ***pork***, he felt that ***Chinese*** pork import volumes

Figure 1. World Meat Consumption 2018-2028, '000t cwe



would improve in the second part of the year. The market for pork variety meats remained of particular importance for exporting countries to China.

US pork production had been well maintained during a period of reduced profitability. This was due to increases in productivity possibly partly linked to the extra care taken by producers to upgrade their biosecurity in the face of a possible ASF outbreak. US pork exports are expected to remain at similar levels in the next 2 years.

Brazilian pork production has increased significantly in recent years and both production and exports are expected to rise further in 2024 with China continuing to be the major market.

The reduction in ***EU*** pork exports was inevitable with the pressures from European consumers on the industry to introduce stricter animal welfare and environmental measures which resulted in EU prices becoming less internationally competitive. Exports had already declined significantly in 2022 and 2023; a less marked reduction is forecast for 2024. Of interest is the fact that the main EU pig meat exporting countries have had contrasting experiences. Spain and Netherlands were increasing their exports during 2023, including to other EU countries, whereas there were declines in Germany and Denmark.

Will the Sustainable Agenda Continue to Grow at the Current Rate?

Justin raised the question of whether or not the sustainability agenda is growing or in retreat in relation to livestock industries. On the one hand, attention to these issues appears to be on the move with major food companies now driving change through their supply chains. On the other hand, the recent farmer protests in several EU countries and the imminent European Parliament elections in June give the farming industry an opportunity to influence politicians to adopt a slower pace of change.

The critical question farmers are asking is 'Who is going to pay for the additional cost of applying these sustainable measures?' Outside Europe there is a mixed picture and this is further complicated by the fact that the sustainability agenda is broad and includes a complex range of issues.

EU's Deforestation Regulation Causing much Concern

A central tool, which will be needed in future, is the requirement of supply chain traceability and this is particularly relevant with the EU Deforestation Regulation (EUDR), which was agreed in early 2024. The regulation is designed to ensure that seven commodity products, including beef, can no longer be sold in the EU 'if sourced from areas affected by deforestation or forest degradation practices.'

A complex list of requirements to prove compliance with the EUDR has been drawn up with implementation effective from December 30, 2024. The regulation applies to countries inside the EU as well as to third country suppliers. Although the EU only imports approximately 5% of its beef from third countries, there would be particularly important implications for the major supplying countries, Brazil, Argentina, and Uruguay.

EUDR is important but should be seen in the context of the full global biodiversity agenda; the UN Framework for this was set out in the 2022 Biodiversity Conference. A range of areas agreed by Governments are covered, including conservation and management of at least 30% of the world's land and waters, restoration of degraded ecosystems and the reduction of the loss of areas of high biodiversity.

These could all potentially impinge on the livestock/meat sectors. Major companies, as well as financial organisations, will need to keep abreast of developments. If the EUDR approach is taken as the way forward to solving these issues, there is a danger that major additional costs could be incurred without achieving the desired objectives.

Further Evidence of Increased Disclosure Pressure on Supply Chains

Justin mentioned three other examples of the greater emphasis on sustainability with potential implications for livestock supply chains:

- In the US, the California Department of Food and Agriculture has now set out details on the requirements for all pork that is to be sold in California under State Proposition 12. This includes higher animal welfare and

Figure 2. Uncertainty in Global Trade



sustainability standards than are currently applicable in the rest of the US. Enforcement of this will involve audit trails and transparency throughout the supply chain.

- Corporate due diligence legislation was agreed in the European Parliament to safeguard human rights and the environment; so far this has been blocked by the EU Council of Ministers but could there be a change of heart at some future date?
- The attempt by the US Securities and Exchange Commission to secure agreement to enhance and standardise climate-related disclosures for investors. If Scope 3 emissions were included under this legislation in future years there could be important implications for food sector companies.

It is early days for assessing the longer-term threat of these initiatives. Nonetheless, there seems little doubt that there will be greater pressure on supply chains to make further auditable disclosures. Animal protein supply chains need to face up to the 'direction of travel' implicit in these initiatives. So far they have appeared to be slow in their reactions; however, 'catching up could be costly.'

You are most welcome to join the Economics Committee and attend future webinars. If you would like to do so, please contact the Chair, Erin Borror: eborror@usmef.org

Bob Bansback
IMS Advisory Committee

IMS Marketing and Communications Workshop Bord Bia, Dublin, October 2023

This article concludes the two-part report of the 2023 IMS Marketing Workshop (the first article was published in Newsletter 658, January 2024)

Session Two – Barriers to Meat Consumption

"The Dublin Declaration of Scientists on the Societal Role of Livestock" was published in June 2023. Authored by Frederic Leroy and Declan Troy, it was launched to "balance the debate" on meat consumption by using science rather than rhetoric to combat the multitude of "opponents and detractors".

EAT Lancet, and others, have, for many years, been using and sharing unbalanced messaging about the role and value to human health of meat consumption, not backed up by scientific evidence. Many of these negative health claims have subsequently been called "science fiction".

Rather than just accept the negativity it was suggested that the meat industry internationally come together to:

1. identify the problems
2. make a robust case
3. insist on the scientific evidence
4. mobilise support

The Global Meat Alliance showcased their approach focusing on:

- building networks
- delivering insights
- facilitating collaboration

GMA identified their current "Big 5" issues as:

- next generation farming
- primary pork
- World Iron Week
- FAO event
- how to engage at COP 28

Sustainability has been a relatively new entrant to the challenges to meat consumption and Bord Bia have been working on the survey *Understanding the Consumer and Carbon ... Striking the Balance, plants, protein and the planet*.

The consumer is becoming increasingly confused by the complexity of the subject. There is limited real understanding of carbon claims and, not surprisingly, because of the increasing range of challenges, human nutrition remains more important than the environment.

Alternative proteins are largely supported by younger, idealistic consumers who are often able to influence their parents. Balanced messaging and greater diversification will be needed to to meet the future demands and concerns of consumers.

Australian Pork have targeted the foodservice market with "Porkstar". Focusing on Influencers and Food Professionals they are encouraging independent chefs to become "rockstars" as part of this, largely through social media.

Annual national marketing events have targeted the top 18% of the foodservice market using high end chefs and restaurants to spread the pork message through to the High St and supermarkets. To date, A$1.06m added value has been created on a limited budget.

Bord Bia have achieved growth in the value and low cost segments in the EU after many years of focusing on premiumisation. This is part of their journey to "sustainable marketing" and achieving greater profitability from carcass utilisation.

EU rules on green claims have been challenging and "greenwashing" must be avoided at all costs, not just by the meat industry, but the food industry in general, if consumers are to understand and believe sustainability messaging.

Canada Pork introduced "Pork on the Plate", focused on consumer choices. Using a limited budget

they targeted continuity of messaging overreach. The target audience was clearly defined both by a combination of attitudes and media choice.

The barrier was clearly defined as the cost/value of pork and the messaging sought to explain the values of pork to consumers. Support messages sought to overcome consumers negativity on cooking temperature, "safety" of pork and dry/overcooked product.

AHDB in the UK is concerned with a range of agricultural markets and is able to, where appropriate, work across markets to get its messaging across to consumers. "We Eat Balanced" is an example.

Its messaging is across a range of channels including the web, social media, point of sale, education and human health and nutrition. Based on consumer insight into which messages are motivating to consumers, opportunities are identified which move into activation. These are already achieving a range of positive attitudinal gains.

A wide range of messaging has been utilised under the consistent theme, including human health, sustainability, naturalness and vitamin B12. As has already been noted, human health outperforms sustainability in consumer communication, particularly among "Happy Carnivores".

Underpinning the campaign are a range of outputs:

- use of "long form" PR to keep messaging visible and simple
- using farmers as the basis of stories and articles for authenticity
- thinking beyond taste and the environment
- changing the narrative by the introduction of nutrient density, etc.

Belgium is a small country and has introduced the theme, "Not more meat but better meat", focusing on inspiring consumers to consider and buy "local meat". This was particularly focused on consumers who were regular consumers.

"Good Local Food" was a multi-sector approach based on science and promoting its benefits to Belgian consumers.

Barriers to Meat Consumption

Many of the barriers are long standing, particularly in the developed world. However, they are frequently based on rhetoric and poor, if any, science. The international meat industry is beginning to push back on these messages with responses soundly based on science.

The range of issues is complex but it is interesting to note that, despite the increase in challenges around sustainability and the environment, the consumer still sees human health as its major concern.

The use of green claims in promotion are increasingly being challenged and regulated. To be credible the meat industry must be able to substantiate its messaging to avoid serious challenges. Campaigns such as those run by Bord Bia in Europe, AHDB with "We eat balanced" and VLAM's "Not more meat but better meat" are all successful examples to help the meat industry look forward positively.

Session 3 - Development of Meat Consumption

QR codes were in major decline before Covid but have rapidly made a comeback as a way of easily and cost-effectively giving detailed messages to consumers. Canada Beef has been making extensive use of QR codes across its range of products in domestic and export markets.

The customer experience is key to connecting consumers to the product. Codes on every cut mean that Canada Beef can look at the information generated to see which messages are most read and motivating. They have partnered with major retailers and shared information to improve retailer/consumer engagement.

GIRA explained the importance of food security to all sizes of nations across the world. Whilst developed Western economies may be challenged on meat consumption, due to both image and price, many developing nations are looking for more protein!

GDP and meat consumption are frequently linked. Chinese pork consumption peaked in 2014 and, since then, they have been looking for other premium proteins.

Other differences are based on how far economies have come from being close to agriculture and the evolution to superstores (richer nations) from local/convenience stores (poorer nations). Consumption is driven by population and economic growth, resulting in increased urbanisation. The focus on "traditional meat" then moves to, first chicken, and then, processed/convenience products.

Does Brazil have a serious problem with HPAI and does it, or will it, seriously affect chicken production? Over 40% of Brazilian chicken is exported, so if there was a major outbreak both domestic and export sales would be seriously affected resulting, at the very least, in significant product shortages and price increases. The knock-on effect would also be felt in all protein markets.

The National Pork Board in the USA have identified a problem with the long-term demand for pork. The biggest problem is demographic changes that are happening. Older consumers are being lost so there is a need to replace them with younger cohorts.

Between 2022 and 2032 it is predicted that in the USA the younger generations will increase from 18-27% of the population whilst the 58-76 year old cohort will reduce from 21-16%. To maintain pork's relevance new attractions and incentives are being developed to stimulate purchase from younger consumers.

Australian Beef exports 75% of their production, largely to Asia. To assist in promotion they have identified 5 drivers of food consumption in Asia:

- enjoyment
- health
- convenience
- integrity
- culture/status

The purchase of beef is driven by increases in disposable income. The rising affluence of SE Asia is seeing the move from the wet market to the supermarket. The better educated (richer) Asian consumers have more in common with similar groups around the world than their rural neighbours. This is leading to a globalisation of food trends such as curries, stir fries and sushi.

Whilst most countries are able to provide accurate information on their meat production and consumption, sub-Saharan Africa is an exception. Few reliable figures are available to accurately assess the size of the market and any opportunities. Meat Boards have been established in South Africa and Ivory Coast but, as yet, have little in the way of resources to work with their markets.

Red Meat Industry Services has been established in South Africa bringing together 13 local organisations to give a single focus to the production and promotion of red meat. It currently exports to 26 countries and 80% of its production is through feedlots.

The Livestock and Meat Commission of Northern Ireland have, for many years, run a wide-ranging programme of education to school-age consumers. Through a well-trained team they visit large numbers of schools to get across a range of positive messages about red meat, including the cooking and eating of red meat.

A new tool in the range of marketing communication is Artificial Intelligence. Currently, AI is in its infancy, but there is already a debate on how, if at all, it can be used in our outputs. Anecdotally, AI is already being used by the meat industry's opponents to assist in rapidly spreading low cost, anti-meat messages.

Some basic questions:

- Is there a future role for the meat industry to utilise AI in its marketing outputs?
- Can ChatGPT be used to answer the challenges?
- Can AI become an enabler, not a replacement, for marketing strategy?
- Can our messaging be improved in either/both content or cost through the use of AI?

These are very basic questions as AI is really in its infancy in the world of marketing and communication. However, it is something that individual IMS members and the Marketing Committee will be considering very carefully in coming months.

During Covid there was a marked growth of plant-based proteins. Consumers across the world became increasingly aware of diet as part of health and started to experiment with an increasing range of plant-based alternatives. However, as "normality" returned the market began to enter a level of maturity. With so many non-meat burgers and other me-too products the attraction began to wane with product de-listings and a reduction in consumption.

Whilst nobody would claim the plant-based market is dying it is certainly under pressure to retain its shelf space. Also previously accepted claims of "better for you" are being disputed due to high fat and sugar contents… let alone high prices for just veggies!!

So, whilst the market is being challenged, is another threat about to arrive? "Cultivated meat" is being approved in many countries, making (unproven) claims to attract environmentally concerned consumers. Watch this space!!

Key Takeaways

If Session 2 was about "defence", then Session 3 was about "promotion".

Across the world, to oversimplify, meat consumption is under pressure in the developed world, but looking at growth in the developing world. Another challenge is the worldwide decline in older ("Happy Carnivores") and the growth of younger consumers who have many more diet options.

Over many years the budgets available to meat bodies has reduced, meaning that new, lower cost methods of communication have been trialled. The use of QR codes and work to better understand consumers, in relevant markets, is key to more focused, cost-effective communications … "using a rifle, not a shotgun"!

A FOOTNOTE!!

Two new elements became apparent during the Workshop and will need to be addressed as they evolve.

- Lab grown meat

Whilst plant-based food may have peaked, lab grown is being approved in many countries. This may prove to be an alternative to meat for environmentally concerned consumers and should be carefully monitored.

- Artificial Intelligence

The world of technology moves rapidly and it is only a year or two since the Metaverse was the next big thing! AI has the potential to radically change the way many companies and markets communicate. The meat industry must not only be aware of this but, at an early stage, participate by developing its marketing and communications strategies and outputs.

….AND FINALLY!!

At the end of the Workshop, Peter Haydon stepped down as Chair of the Marketing Committee. Peter had bought his excellent marketing skills and creativity to the role as was thanked by those attending.

Courtney Knupp, from US Pork, was elected as the new Chair and is currently reviewing feedback from Dublin before considering future developments and directions for the Marketing and Communications sector of IMS.

Chris Lamb, past Chair
IMS Marketing Committee

Marketing Meat When Inflation Takes a Bite

When inflation at the supermarket remains stubbornly high, what's the best way to entice customers to spend at the meat counter?

That was the prime question at this year's Annual Meat Conference, held in March in Nashville, Tennessee, and co-sponsored by FMI – The Food Industry Association and the North American Meat Institute. The question also received considerable attention in the "Power of Meat" study that accompanies the conference.

As reported by *Meat+Poultry Magazine*, "Meat remains the biggest revenue generator among the fresh departments at retail with US$99 billion in sales, 98.2 per cent household penetration and 48 purchases per year." And while the rate of inflation in the meat department was lower than the rate for total food and beverages purchased at the supermarket – 2.1 per cent versus 5.9 per cent – rising meat prices caused shoppers to buy more meat products on sale, to change the amounts and types of meat they purchased including different cuts, and to buy more house-branded meat products, according to data recorded in "Power of Meat."

"Inflationary pressure felt by consumers materialized in the meat department as shoppers bought meat less frequently and bought less per purchase — dollar sales were flat (0.1 per cent) and pound sales decreased 1.0 per cent year-on-year," reported the magazine.

"It is a pattern that we are seeing across the entire store because one thing is for certain, the pressure on America's pocketbook is real," Ann-Marie Roerink, principal and founder of 210 Analytics, commented at the conference. "If we compare today's food and beverage prices to those seen in 2019, people are spending 32 per cent more on food and beverages than they were prior to the pandemic.

"They've used credit cards to supplement what they make. They've depleted the savings that they had. We also know that in March, about this time last year, those additional [federal government food assistance] benefits ran out. Student loans are due again. So, there's a lot of pressure in the pocketbook and all that is resulting in the patterns that we're going to talk about today."

Silver Linings

A silver lining, however, is that while inflation has caused Americans to trim back on luxuries such as restaurant meals, home-cooking has increased. "With shoppers including meat in nearly 87% of home-cooked meals every week and looking to meat to make occasions special, the opportunities to provide great choice, taste and value continue to grow," said Rick Stein, vice-president for fresh foods for FMI.

The other good news for the U.S. meat industry, according to "The Power of Meat," is that demographic changes are bringing meat-centered meals into increasingly favorable light. For example, and rather interestingly, the members of so-called "Generation X" (those born between 1965 and 1980), which is the smallest of current U.S. generations, account for the greatest proportion of meat sales at 32 per cent.

"If we dig even deeper and we do the same exercise based on the different generations that are in the marketplace, you see that the big money makers right now are Gen X," Roerink said. "Even though it's a small generation, they're very much punching above their weight given the fact that they are very likely to have families as well as the income to match."

Baby Boomers (those born between 1946 and 1964) also remain an important demographic for meat and poultry retail because they buy meat most frequently — 53 times per year. "Boomers are in our stores quite a bit," Roerink said. "They don't spend as much as the other generations while they're in the store but look at their number of trips at 53 times per year compared to just 40 times per year (for millennials)." Among the generations, Millennials (born between 1981 and 1999) spend the most money per meat purchase. "That means each and every time millennials are in the store, we need to make sure that those purchases count," Roerink said.

Packaging and the Power of Persuasion

As reported by *Meat+Poultry*, retailers can optimize trips and units sold per trip by leveraging consumers' acceptance of case-ready meats which have reached record highs. Based on findings from the 2024 Power of Meat study, retailers should consider pack size variety, freezer-ready packaging, secondary displays and cross-merchandising. Additionally, a majority of consumers (91 per cent) surveyed for the Power of Meat study said they can be persuaded to spend a little more on meat and poultry. Top reasons given for spending more include holidays, special occasions and entertaining friends and family.

This year's study also revealed major shifts in where consumers are buying meat. According to *Progressive Grocer*, "In 2007, supermarkets were the primary meat purchase channel, with 71 per cent of purchases, compared to 16 per cent for supercenters. Today, traditional grocery stores are at 48 per cent and supercenters are at 32 per cent. Club stores picked up three per cent and the advent of online shopping siphoned away another one per cent."

"Shopping for meat and poultry is a balancing act between money, time, nutrition, taste and meal occasion for consumers," noted *Meat+Poultry's* report on the Meat Conference and "Power of Meat" study. "Convenience is important but price takes precedence for shoppers trying to manage tight household budgets. The solution for a majority (87 per cent) of consumers is meals that mix prepared foods and scratch-cooked items. But price has become a headwind to that trend."

The Power of Meat study concluded: "Help shoppers create meals they want to make again: 92% of shoppers agree the meat/poultry can be a great price, but if it did not taste good, they will not buy it again. "Emphasize quality and taste and provide relevant tips by preferred cooking appliances. Air fryers are now the number three appliance in preparing meat and poultry, behind the stove and oven."

Steve Bjerklie, Contributing Editor, *Meat & Poultry* Magazine; correspondent, *The Economist*.