

Background and detailed information on the 2019 UECBV Annual Conference

I. Opening - Welcome Speeches

The conference was open by EDOK President, Lefteris Gitsas, whose speech underlined that *“the organisation of the International Conference was a major challenge for EDOK, with great interest, as Greece is an important meat market, considering the population of at least 10 million, with 30 million tourists added every year, who have to eat and taste Greek cuisine, in which meat has a leading role.”* Greek beef production ranges from 26-28% demand, and 30-32% for pork; so, by definition, Greece is an importing country. In sheep and goat meat, there is self-sufficiency of 92%, and export options. *“We are interested in meeting the needs of the country, but for us, EDOK, it is also very important to exchange views and know-how with our colleagues from Europe to strengthen our market position, and, on the other hand, to contribute to the developments that are taking place in our sector at a rapid pace. This International Forum is an ideal time for all of us as part of the European Meat Sector to set our own goals and prepare to turn the “Green Deal” from a problem into an opportunity for growth.”*

The Minister of Rural Development and Food, Mr Makis Voridis, said he shared the concerns of farmers and stressed that one should make sure that imported products from third countries meet the same high standards as those produced in the EU. Concerning the “Green Deal”, the Minister underlined that if one sees it as *“merely a set of additional obligations, it loses the big picture. In the EU we are now developing innovative, high quality products that appeal to informed consumers. I hope everyone will see the opportunities created by these conditions.”*

Mr Voridis also referred to the visit of the Greek President with the Chinese Government in Athens three days later, tackling the benefits to Greece of the China-European Union trade agreement, underlining the important prospects for Greek farmers, as the Greek slice is included in the list of protected products.

Stressing that the legislative framework for Inter-branch Organisations will be ready by the end of November, the minister called for the highest possible representation of the National Inter-branch Organisations and underlined that the percentage required for their recognition would be reduced at first.

UECBV President Philippe Borremans mentioned in his speech: *“From our point of view, the term “Green Deal” implies that partners act together, that is, cooperate in the common interest. This is something we also confirmed in our recent campaign, entitled #MeatTheFacts, and the slogan “What would life be without livestock”.*

He stressed that it was an honour, being at the cradle of Europe, to take the opportunity of discussing the next strategical steps for the future. He highlighted that UECBV could be the centre of exchange of views and put forward the main issues, keeping in mind that the Green Deal means a deal, i.e. working together for both sides, producers and consumers, without winners or losers, just winners.

II. Trade policy and interactions within the EU / non-EU, Balkan, South East Mediterranean and Near East Countries: economic picture, potential and future in light of the new EU Commission Green Deal

Panel Discussion with the speakers and representatives of the industry chaired by Margaret Boanas, UECBV International Trade Section Chairwoman and Vice-President, and moderated by Georgios Didangelos, Agronomist-Agroeconomist, Secretary General of EDOK.

First, French Livestock Farming Institute, IDELE's Financial Services Director, Philippe Chotteau, pointed out the dynamic outlook on increased meat consumption in the south-eastern Mediterranean, especially beef and veal, and the particular area of live cattle trade. He stressed that competition would intensify in the region, also because of the agreement with Mercosur.

Further, it was explained that the export strategy in EU countries was currently heterogeneous. *"For example, Spain is internationally oriented and 50% of its exports go to third countries. Italy mainly targets the intra-European market while Greece deals primarily with its neighbours, Bulgaria and Cyprus."* He added that the south-eastern Mediterranean countries were relying on meat imports and that was a dynamic and emerging market, with increasing live cattle exports from South America to Mediterranean Countries (outside the EU).

The President of the Pan-Hellenic Association of Shipowners and Exporters, Mr Nikos Mavrikos, stressed that Greece, based on its geopolitical position, could support Europe in meat exports. *"The port of Piraeus can be a great asset to the country, for Greece to become a major transit hub for the south-eastern Mediterranean developing new trade routes."* He highlighted that Greece benefited of modern harbour infrastructures and storage capacity to play its role in the trade of agrifood products, by particularly ensuring the cold chain.

Andreas Demetriou, President of the Poultry Farming Association of Ioannina, presented the picture of livestock production in Greece, saying that livestock contributes only 25% of the total economic activity of the Greek agricultural sector, when the EU average is 41%. He emphasized that tourism could be a useful tool for any structural and economic reconstruction effort in the sector.

Ms Panayiotas Papadakis, representing the Ministry of Rural Development and Food, referred to the World Health Organization's sanitary and phytosanitary measures, which must be implemented by all Member States of the European Union in order to safeguard consumer health, without creating barriers to trade. *"These measures should be based on scientific principles and should not be a barrier to the conclusion of trade agreements"*, Ms Papadakis stressed. She added that, even if the EU COM has the mandate to negotiate EU Free trade agreements, trade is far from being automatic and still depends a lot on bilateral relations between individual MS and the trade partner countries.

Ms Athanasia Doukaletsi, Veterinarian, Lead Auditor for Food Safety Management Systems TÜV HELLAS (TÜV NORD), explained the importance of certification, the benefit of certification schemes for the operators and what schemes were available for the operators, such as ISO 22000, IFS, BRC, FSCC.

Mr Enrique Oliveira Moralejo, ES, representing UECBV in the panel discussions, highlighted the high added value of livestock for biodiversity, the maintenance of rural areas, the preservation of the landscape and the high nutritional value. The livestock and meat sector will continue to be criticised

and needs to better communicate on sustainability and on all measures in place to ensure a high animal welfare level.

III. Meat Industry 4.0, how new technologies could be used in the meat sector to face labour shortage and to answer the new EU Commission Green Deal sustainability goals?

Panel Discussion with the speakers and representatives of the industry chaired by Jos Goebbels, UECBV Meat Industry Section Chairman and Vice-President, NL, and moderated by Andreas Georgoudis, Professor, Director General of EDOK, GR.

In her introductory speech of the second session, Deputy Minister of Rural Development and Food, Fotini Arabatzis, emphasized that “sustainable livestock is the innovative livestock” and emphasized that “*our goal should be to harmonise production with the real potential of our country*”. Furthermore, with regard to climate change, the Deputy Minister stated that oversimplified positions do not provide answers: “*Climate change is necessary, but it is not meant to weaken livestock. Our efforts are focused on producing high value-added products. This will be the Greek response to the challenge of global livestock farming, which is climate change.*”

The global transformation we are facing was addressed by Mr Tassos Haniotis, Director of the Directorate-General for Agriculture and Rural Development at the EU Commission. “*The global food system is moving from the phase of solving economic and social problems at the expense of the environment, to a phase where both economic and environmental problems with precision agriculture will be resolved and possible social tensions like health, digital divide, gap in labour market in urban and rural areas*”. He emphasized that “*the starting point for strategic planning must be the most recent documented and scientific information. For example, are cows more polluted than cars? We need to focus on that. We don't need to talk about how many articles the Agreement will have, but how it will become an opportunity.*”

The Director in the Commodities and trade team of Copa-Cogeca, Mr Daniel Azevedo, mentioned the CAP and new technologies. “*We support the Common Agricultural Policy but the European Commission wants to reduce aid and this will only have a negative impact*”, he mentioned, adding that one producer would not only invest in new technologies because the costs were low, but because the economic returns would be attractive. “*Digital technology helps small farms promote their products locally, or sell their animals before their fattening is complete*”, Copa-Cogeca's Director pointed out. He added that trade was essential for farmers; the EU farming community is committed and proud of the EU model of production; however, EU farmers still have not been able to get market recognition for their valuable work. There are no climate deniers in the agricultural community!

The Secretary General of Commerce and Consumer Protection of the Ministry of Development and Investments, Panagiotis Stampoulidis, expects, soon, new investments in the meat sector in Greece. As he said, “*in recent months our country has begun to develop a new investment environment and this can be the basis for investment in the meat sector. The new development law will solve many problems. Without bureaucratic hurdles and with enough tools, investors can now easily choose where to invest.*” Mr Stampoulidis said: “*We are concerned about low performance in domestic production, but this is something that can be improved as Greece acquires an investment-friendly*

environment. At the same time, we codify all rules for the movement and marketing of products and services. We are all convinced that we will soon see new investments in the meat sector.”

Niels-Henrik Grothe, Director of Automatization at the Danish Technological Institute, informed via animated film sequences about increased demand for customization, which will be from bulk to single piece production. Developing a strategy is the solution, not technology; industry 4.0. is a tool. The competences and the knowledge are there; we need to create the interaction. If the sector is able to unite its forces, it will face the challenges. In the scenarios for the future, there are 3 main common drivers:

- Increased demand for customisation: be more flexible than today and convert product in more added value product.
- Increased sustainability, which is larger than only cost of production, and can also mean decreasing these costs. High tech industry is part of the solution.
- Working on the image to be able to recruit new people, in particular being attractive by developing new technologies.

Klemens van Betteray, Vice-President of CSB-System AG and Agricultural Economist, University of Bonn, Germany, pointed out that IT processes were getting faster and that Automation was the driver for Industry 4.0 – with regard to sensor systems, especially image processing is being urged on. Automation of intralogistics will continue and automation enables better hygiene with logistical cost benefits. Long-term development towards the Smart Meat Factory has to run “step by step”. High-performance ERP system is the central basis for the Smart MEAT Factory. He concluded that Digitalization ensures competitiveness of the enterprises and Digitalization supports requirements for sustainability management.

Yannick Henry, Deputy Director for Social Affairs and Vocational Training, Fedev, FR, highlighted the importance of training in the meat sector. A short film showed how new technologies can help to improve workers welfare on the line. When it comes to maintenance of the equipment, the sector is in competition with others asking equivalent competences. When recruiting, there is a virtual platform available to show the work in a slaughterhouse. New technologies are useful to attract the young workers. Nevertheless, the meat sector has a defective image. Building a social dialogue at EU level could be a necessary solution for moving forward.

David Fernández, Industry 4.0 Advisor for the Catalan Government, ES, drew the attention on the fact that the sector is late and needs to adapt to face the increase of costs and other challenges. Industry 4.0 is a tool that could bring a revolution in the way of working. Automation will be able to replace non-qualified workers. The sector should concentrate on its best skills, highlighting these activities and going for sub-contracting for the rest.

Bjarne Thomsen, Senior Consultant, for the Workers Associations EFFAT, DK explained his association was supporting the development of automation. There is an acute labour shortage and the costs of work in Denmark are not competitive. Robots may help to attract younger workers and also to make them stay longer on the labour market.