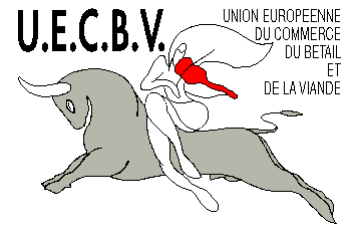
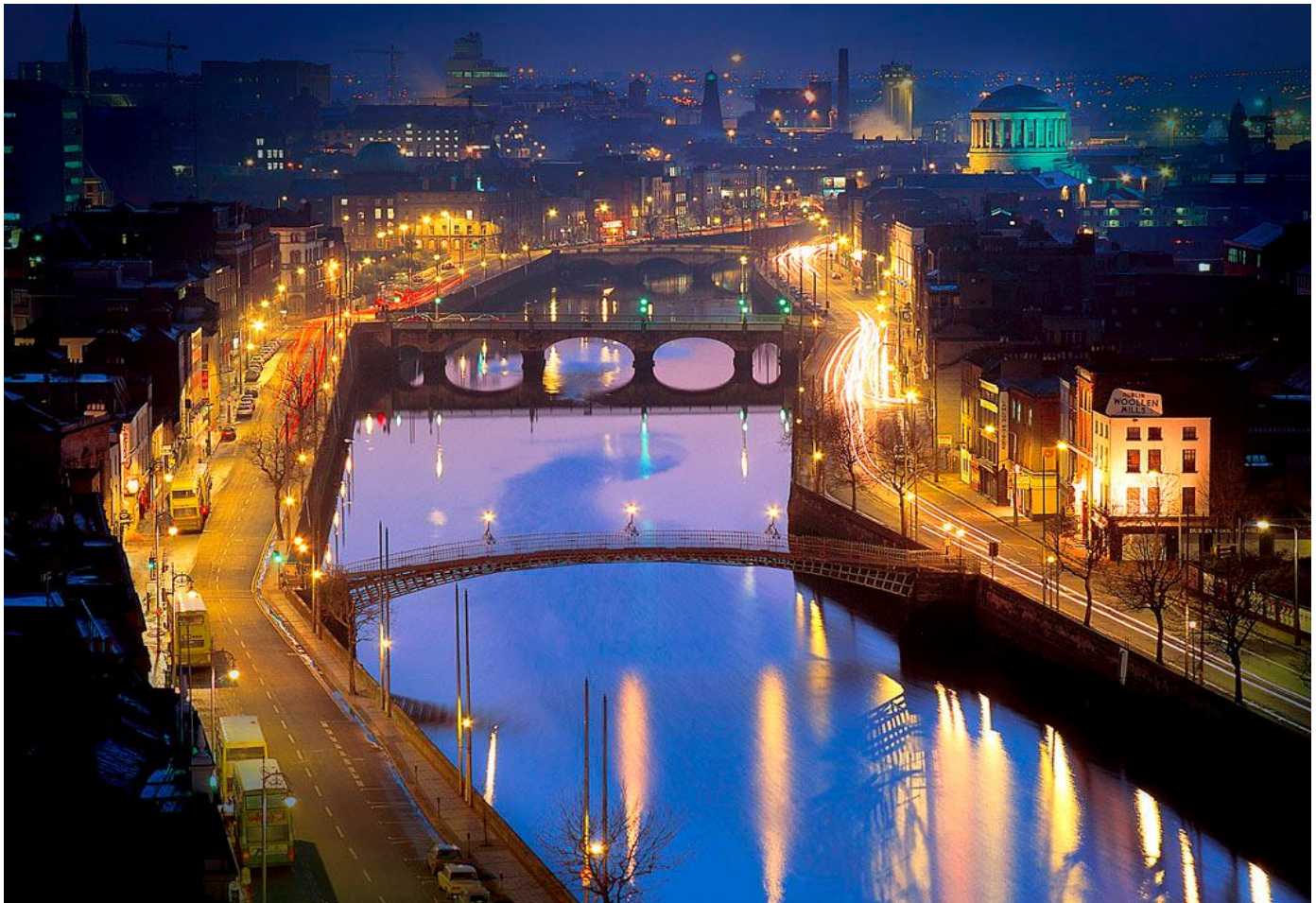




Young European Meat Committee



YEMCo 10th Anniversary Conference



Dublin, Ireland
24 -26 March 2011

In partnership with



The opportunities for Europe's meat industry beyond 2013 !

also a

Celebration of YEMCo's 10th Anniversary!

FRIDAY 25 MARCH 2011

Friday was the day of professional visits. There were two options to choose from/

Business Day – upon INVITATION ONLY

There were a “business day” organised by the Irish organisers for selected companies, designed to give Irish Meat Companies the opportunity to contact specific delegates who may be current customers or potential customers. This was a tailored programme of business meetings and plant visits to their own production operation.

All other participants were invited to FARM AND FACTORY visits. There were 2 tours to choose from:

ITINERARY 1 – Wexford



First, there was a visit to Primary Processing Plant for Lamb, IRISH COUNTRY MEATS, Camolin Co Wexford (www.irishcountrymeats.com). Irish Country Meats is Ireland's largest sheep meat processor, with a philosophy of specialisation that delivers unrivalled expertise in quality lamb production, cold chain management, processing efficiency and after-sales service.



This was followed by a visit to “Crean Farm” in Gorey, Co Wexford and a visit to the traditional Bosco’s Traditional Irish Butchers, in Carlow as well as a visit to the Irish Retailer Superquinn, Carlow. Superquinn is dedicated to Irish fresh foods. While we stock a remarkably wide range of packaged grocery brands, Irish fresh foods are our speciality.



ITINERARY 2 – Kildare

The second trip begun with a visit to Irish Retailers in Dublin, Dunns, one of the leading supermarkets with a 26% share of Irish market.

The group then visited Sheplands Farm, Sallins, Co Kildare, a model farm of good practise chosen by Board Bia.

This was followed by a visit to the 2010 award winning No.1. Butcher of Ireland: [Nolan's of Kilcullen](#)! Nolans Butchers was established in 1886. Set up in the main street of a small village in Co.Kildare known as Kilcullen. It continues today with the next generation of the Nolan family, Andrew and his son James. They boast a staff of full-time and part time workers of about 20 men and women.

This butchers shop has become something of an institution for many people. There are many obvious reasons for this, such as quality, reliability and value for money; Nolan's however has a unique atmosphere. Dubbed aptly as the "social centre of Kilcullen". There is a vibe in the shop that typifies the nature of the people of the area. People arrive not only for the meat but also for the "meet". It is this combination of guaranteed quality and the unique atmosphere that make nolan's the butcher's with a difference.



In the afternoon, a visit to Meat Ingredients Production Plant took place: DAWN FARM FOODS (www.dawnfarms.ie). Dawn Farms is the leading multi species fully cooked and fermented meat ingredients company in Europe. Dawn Farms supplies leading food manufacturing companies and blue chip foodservice brands in Europe from probably the most technologically advanced cooked meat facilities in Europe. Dawn Food supplies sliced, diced, ground, IQF Cooked Meat ingredients for Pizza Manufacturers, Ready Meal/Recipe dish manufacturer such as Pizza Hut and Subway.



NETWORK RECEPTION

In the evening, all participants met for a reception/gala dinner with the Guest of Honour – Mr. Simon Coveney TD., Irish Minister for Agriculture.



YEMCo conference – Saturday, 26th March 2011

The morning started with presentations high-level speakers. This session was chaired by Mrs. Eva Moser, Chairman of YEMCo. Over 100 participants joined an active debate.



The topic of the first session was:

“The opportunities for the meat industry beyond 2013”

Aidan Cotter, CEO, BORD BIA;

Aidan Cotter outlined the challenges of food production arising from the massive growth of the population. How to provide significantly more food and feed for a growing population while respecting the environment and dealing with climate change ?

What role does the meat market play in this? The growth in meat consumption will lead to additional 40 million tons of meat which needs to be produced, which is equivalent to the meat production of the EU in any year. Poultry and Pig meat will represent 90% of this growth. Asia and China will be the key drivers'. The growth will be met mainly by South America.

The deficit of beef production in Europe will lead to bigger imports from South America. What are the issues that the meat industry needs to address? Scale, the consumer 'feedback loop », embracing the culture of innovation are amongst those issues.

The key message to the international audience: COME SEE US – Irish Meat companies are open for inspection and open for business.



[\[Click here to access the Power Point Presentation\]](#)

Mairead McGuinness, MEP, Member of the Agriculture Committee of the EP

CAP Reform



Mrs. McGuinness, MEP gave an update on the current CAP reform. Nothing is settled yet, but the debate over the share of of the budget is heating up. Finance ministers are not prepared to consider enlarging the budget. If the budget remains as it is currently, the question is : « What CAP post 2013 would we need ? ». There may be more « greening » that is foreseen, also some redistribution of payment. But nothing is settled and the more you debate this, the more difficult it becomes. Flexibility is key here. Mrs. McGuinness said the EU Commission should not add « Green Tape » to the « Red Tape ».

Consumers

Food information to consumers is a hot topic; in the end, the country of origin labelling issue for beef was not so bad for some countries in the EU. There may well be an extension to other meats in the future. This may also be extended to processed food / meats in the future. What is correct labelling in the 21st century? She would be interested in the views of YEMCo.

Other hot issues

Other hot issues concern novel foods includes the cloning of animal and the GMO feed issue. Fairness in the food supply chain – to try and to archive a fairer price for farmers must also be on the agenda.

Padraig Walsh, President of Copa - EU farmers' association



Copa President Padraig Walshe highlighted the catastrophic impact the EU's current trade liberalising talks, notably with Latin American countries and Morocco, could have on the EU farm sector, unless urgent action is taken. Mr Walshe stressed that there are a series of bilateral trade deals being negotiated by the Commission which have the potential to seriously undermine EU producers' incomes which are already only 50% of average EU incomes. For example, trade liberalising talks are continuing with the Latin American Trade bloc Mercosur which would have a severe impact on the EU agriculture sector, notably on meat producers. This is unacceptable. "Moreover, some of these countries can use pesticides and herbicides that have been banned in the EU for years, making them more competitive. They can also use growth promoters in their meat production and profit from the benefits of genetically modified crops as well as labour cost differentials. It is ridiculous that farmers in the EU are expected to compete on such an unlevel playing field". He continued: "The Commission plans on the future Common Agricultural Policy (CAP) post 2013 is the other big issue confronting EU farmers and the EU agri-food sector at the moment. We are concerned about moves to further green the CAP which will make it more costly for farmers to produce. Measures to manage the market must also be retained and improved, especially in the wake of increasing market volatility. The future for food production in the EU will be bright provided the right policy framework is in place. We have to meet the challenges of increasing production to meet growing world food demand so now is not the time to reduce production. We need green growth not green constraints. There is a need for research into how we can increase production at the same time as protecting the environment. A crucial decision which is yet to be taken is also the size of the EU budget after 2013. We cannot have sufficient production without a sizeable budget in place".

Eugenio Longo, Cryovac Sealedair Director, Sustainability Consultancy Services

A very interesting presentation followed on enhancing Sustainability with Packaging Solutions, by Eugenio Longo, Director of SMARTlife™ Sustainability Consultancy Services Of Sealed Air Corporation. His company is a leading global innovator & manufacturer of specialty packaging and performance-based materials & equipment systems. Their products are all around the food chain and can involve food packaging that makes mealtime more convenient and keeps food fresher and better tasting, protective packaging, transparent shrink packaging, etc.



They are looking for

- Reducing waste and damage
- Extending distribution and shelf life
- Increasing productivity
- Reducing energy and transportation costs
- Increasing ease-of-use

Their new SmartLife™ initiative is designed to demonstrate how packaging can enhance sustainability. Vivid examples in Mr. Lungos presentation illustrated the Cryovac goals. His presentation can be downloaded [here](#)

Discussion with the audience



There was then a discussion with the audience. Phillippe Borremans asked the MEP how far would she be prepared to go to remove the legislative barriers in Europe? Mairead McGuinness MEP believes that production standards are not considered to be restrictions! Europe needs to speak with one voice. Imported foodstuffs need to have the same standards as food from EU countries. In Europe there needs to be policy consistency between different actors in the EU, e.g. DG Agri and DG Trade must work together. But - DG Trade also has to realise that cows are not cars and they are not comparable: The food industry is different from other industries. The president of COPA said that airplanes and cars have a clear standard under which you will never ever sale any. Clearly food is more important, so why not apply strict same standards? And don't forget – why produce 100 million tons of carbon emissions for products produced from outside the EU when it can be done in EU for 30 million tons. It is more economical to do it at home.

Regarding the EU budget for agriculture, please don't forget that in Brazil, the budget for agriculture is 46 billion euro that's 237 euros spent by Brazillian citizens. In Europe, we spend only 107 euro per EU citizen and it is still perceived as too much.

Martin Müller asked about labelling. In Germany, they view it critically. Maihed Mc Guinness said that in principle she is in favour of informing the consumer. Many EP groups say it should be there participatory when its absence may mislead the consumer. The information origin labelling should assist the consumer. A little bit of soul searching of the industry is necessary.

Cormac Healy asked what happened to the « EU labelling » proposal? Answer : It is not part of the discussions. Padraig Walsh prefers EU Labelling , labelling must be easily understood by the consumer.

Westfleisch does not see a danger in the FTA EU - Mercosur trade deal. Mr. Walsh said that one does not insist on the implementation of the same rules. In Europe we cannot use GMO products, the use of hormones and pesticides is banned, yet we import from countries which do not have these rules. So Westfleisch concluded that the real question therefore is how import controls are implemented, not the trade deal itself. In the EU, we export to Russia (very closed, strictly controlled markets), but it remains an attractive market. If we were to enforce our rules, we would still remain attractive for Brazil and Argentina. Westfleisch believes that the EU is reaching limits of productions so we need meat production from Brazil. The MEP said that a WTO deal will hurt the beef production and the rural areas in the EU. We don't have sufficient control, Europe allows the imports first and then makes the controls.

World Pork Conference

Eva Moser, Chairperson of YEMCo presented the agenda and details of the next World Pork Congress which will take place in Bonn Germany just before the ANUGA.

[\[Click here to access the Power Point Presentation\]](#)

YEMCo Autumn Conference 2011

Mr. Spanghero presented the next YEMCo conference which will take place in Weinfelden, Switzerland together with the Annual General Assembly of the UECBV. Thursday, 22 September 2011. On Thursday, 22nd September 2011 there will be visits to a meat plant, a supermarket etc. In the afternoon, there will be a conference with the possible topic "The marketing of meat and meat products in Switzerland". On Friday, 23rd September 2011, YEMCo members will participate in the conference and seminars around the UECBV AGM.

[\[Click here to access the Power Point Presentation\]](#)

The next session was chaired by Laurent Spanghero, President, UECBV.

Roundtable “You have built Europe’s meat industry as we know it today. How do you see the future?”



The speakers were introduced by Laurent Spanghero, who praised their achievements and their roles for the meat industry:

Jean-Marie Joutel, Bigard Socopa, France – (<http://www.bigard.fr/>) explained the importance of his company with turnover of 4.2. billion Euro. He explained that the French beef industry has come out of a period of transition. After some sustained amalgamation within the industry, two groups (Bigard-Socopa and Elivia) now control over half of the beef processed annually. The merger of Bigard-Socopa in 2009 was very significant. It has emerged as the market leader in France in terms of production, accounting for 40% of national production at around 540,000 tonnes of beef annually, which is similar to the Vion group.

Consolidation of the beef industry is the primary challenge facing the French industry. An increase in the number of cattle processed in France would make it possible to spread out structural expenditure in slaughtering and cutting facilities over greater numbers of animals, which should help capture value added.

Dan Browne, from Dawn Meats, Ireland – (<http://www.dawnmeats.com/>). The Dawn Meats Group was established in 1980, with its headquarters located in Waterford, Ireland. It is one of Europe's largest food processing companies food processing companies and meat suppliers and forms part of the Queally Group, Ireland's largest privately owned agri-business. It is one of the largest suppliers of Irish beef and British beef, Irish pork and British pork, Irish lamb and British lamb. The group processes in excess of 500,000 cattle & 1,000,000 lamb per year, from which it produces 200,000 tonnes of added value meat products, including 55,000 tonnes of consumer packs which are delivered daily to Europe's leading retail outlets. stressed the need for a profitable meat production and in fairness for farming. Mr. Browne said that we need to be careful

with the Mercosur negotiations, this could be a real threat for the EU meat industry. This is a clear challenge of the future.

Joe Hyland, of Irish Country Meats, Ireland – (<http://www.irishcountrymeats.com/>) is chairman of the UECBV sheep meat group as well as the EU Commission advisory group on sheep meat . His company, Irish Country Meats is the specialist sheep meat processing division of Slaney Foods, a subsidiary of the Linden Food Group - a combined business which represents significant scale in beef and lamb processing on the island of Ireland. This scale and specialisation facilitates a customer-focused, cost efficient quality beef and lamb product with the customer proposition "big enough to deliver, small enough to care". Mr. Hyland expressed his worry about the significant and on-going reduction of the sheep meat sector. More and more very good sheep farmers have stopped business. It is very critical that we sustain production in Europe. As a product, lamb cannot become completely marginalised. The EU's sheep meat policy has failed and this has been forgotten for the various CAP negotiations. What will YEMCo do not to forget sheepmeat?

Egbert Klokkers, Director – International Sales, Westfleisch, Germany – (<http://www.westfleisch.de>). Westfleisch is a leading meat marketer in Germany and Europe. The international company, based in Muenster, North Rhine-Westphalia / Germany, slaughters, cuts, processes and refines meat. Westfleisch was originally established in 1928 as a livestock marketing cooperative, and is now owned by about 4,700 farmers in North West Germany and the Netherlands. On the basis of cooperation agreements, they breed pigs, cattle and calves. For this reason, Westfleisch is able to guarantee safety and quality along the whole process chain in particular. Westfleisch has approximately 1,900 employees, is the no. 3 meat marketer in Germany and ranks amongst the top 5 in Europe, a cooperate company with about 4500 jobs. Total turnover is about 2 billion euros, 800 000t of meat, 30.000t is processed meats. 43% of the produced tonnage is exported to Europe and third countries. Mr. Klokkers mentioned that the key challenges of the future are related to the energy / land use against food production. Also the image of agriculture and food needs to change.

Robert Tönnies, Tönnies, Germany – (<http://www.toennies.de/>). TönniesFleisch are specialists in slaughter and butchery of pigs, sow and cattle. We produce and deliver high-quality self-service meat alongside convenience products. Marketing and new product development are an important part of the TönniesFleisch way of working and sales offices throughout Europe ensure that TönniesFleisch products are present in all the important markets in Europe. With a turnover of 4,3 billion euros and 8300 employees they slaughter 15 mio. pigs a year and about 150.000 cattle. Over 50% of this is exported. Mr. Tönnies thinks that "world hunger" is the next serious issue to be addressed for the meat industry. A clear challenge for the world, but an opportunity for the meat industry? Another big topic of conversation circles around the consumer and transparency. How to get transparency about our "black box"? We can only do one thing as a solution: Educate the consumer and offer transparency. We also need to create confidence in food safety, e.g. also by the tracing and tracking of meat back to the individual cow. Finally, shelf-life / durability is both a big challenge and a large opportunity: If we can prolong our shelf-life to be able to supply other countries, which are growing then current challenges will turn into great and lasting opportunity.

Soren Tinggaard, Danish Crown, Denmark. Danish Crown is:

The world's second largest – and Europe's largest – pig slaughtering business, Europe's largest meat processing company, Denmark's largest cattle slaughterhouse business, One of the two or three largest meat exporters in the world and the world's largest exporter of pork. – (<http://www.danishcrown.com/>) Mr. Tinggaard explained how "Danish Crown Future" was created. In the future, the main challenges will be:

1. Move focus on the value chain
2. Branding of processed products
3. Growing international competition
4. China's meat consumption will grow greatly. They may have the potential of overflow the world with pork in the future.

Discussion with the audience

A fair income in the food chain

How do you deal with the fact that all your suppliers are suffering? What will happen to the prices?

Mr. Tinggaard said that this year, there will be an improved situation; the problem is the feed / meat protein price. Mr. Klokkers said that in Germany they have destroyed parts of the beef market by making the price too high. Farmers should be paid of course, but we must not destroy our markets. Mr. Spanghero asked if the retailers, the consumers, the producers and the processors talk to each other to discuss the food supply chain? If farmers do not produce, we have no raw materials for the meat industry. Mr. Klokkers said that they are actively engaged in talks at all levels which brought the meat industry in Germany forward. We are well connected.

Maturation of meat – challenges and opportunities

How may innovative packaging help in the future?

Mr. Toennies sees the possibility to enhance shelf-life by 30 days to reach all the countries. Mr. Klokkers thinks that there is no need for this in the pig meat sector: Here, "we don't need to talk about shelf-life in Europe. There is enough time as currently available". For beef this may be different, there the packaging industry may help. However, our work focus is inside the industry - how to optimise production.

Training, Education and recruitment of workforce

How do you see the future of recruitment of new middle management in the meat industry?

How should this problem of the future be tackled? It's not a very sexy area to work in a slaughterhouse said Mr. Joutel. Bigard makes an effort to train people but it is a real problem. Trained people also leave the meat sector to choose something which is more pleasant to work in. There are also social issues, there are recruitment problems, and there are salary issues. There is a problem with the attractiveness of the sector. Mr. Tinggaard talked about the education centre in Roskilde in Denmark. The free movement of workforce in Europe means that currently there are no German workers in German meat plants, Mr. Klokkers confirmed.

The future of the meat processing – what relationship with supermarkets?

Do you think in 2015 we will have a competitive EU meat industry?

Mr. Joutel: We have to be clever. We need to get more from carcasses and explore worldwide opportunities. Days are looking sunny ahead, also for the farmers that are going hand to hand with us.

Mr. Browne: We can be optimistic; food security is something we need to be focused on. We also need a "level playing field" with other players around the world. Also, our efforts should focus on bringing the entire chain together. We are quite confident

Mr. Hyland: We need to ensure that secure of quality of sheep meat so we need sound policies regarding sustainable supply. We need to improve relations with the retailers and the farmers.

Mr. Tönnies : Yes we are competitive, we have good cutting places, we have good export opportunities, our meat is an export success, we assure quality, we respect quantity and quality and we are looking forward to exploring the future export market.

Mr. Klokkers: We are already competitive; we have great stories to tell about our agriculture and our landscape so we can bring the consumers to appreciate the meat. The future for all three species is very good. Not on quality, not on price, not on efficiency - we don't need to hide.

Mr. Tinggaard : The picture is not to clear , we may see competition from “cheap” countries. The pork market is not just one single market; there are so many markets, so we might indeed lose some market share. But not in many markets, we have to stay focus on the production side.

Simon House, Sales Director, Cryovac Food Packaging - West & South East Europe, Sealed Air Cryovac, UK – (<http://www.sealedair.com/default.aspx>)

Mr. House presented the view of related industry. He mentioned further industry consolidation will take place, due to some of the following pressures:

- fall in frozen meat sales,
- demand for shelf-life extension
- Retail dominance –
- global, high meat prices,
- fresh port – moving to packaged,
- industry demand to reduce cost to pack kg of meat

Oil and Energy rises are also of crucial importance.

He then presented some of the answers, that the processing industry can bring: Easy open solutions (grip and tear) and quick rip ! There is a clear move towards shrink raps. He also talked about packaging system automation and integration. There is a significant change in display from the side of trays to full vertical merchandising. There is also better shelf appeal in store, it offers huge benefits. As regards international markets, they consider for Africa to be the new China, the continent still untouched. They consider Nigeria to have great market potential. Cryovac has a permanent exhibition center in Paris, participants are welcome to visit it.

[\[Click here to access the Power Point Presentation\]](#)

YEMCo's 10TH Anniversary celebration

The session chairman was Cormac Healy, Director, Meat Industry Ireland

Comments from UECBV, Laurent Spanghero, President of UECBV



Mr. Laurent Spanghero, President of UECBV recalled the importance of YEMCo and its vital importance in the work of UECBV. He said that YEMCo really established itself as the leading think tank of over 200 young executives and managers of European commercial and industrial firms engaged in livestock and meat business across Europe. Each year, the objectives of YEMCo became more and more clear and today it is a prime forum for exchanging ideas and experiences amongst members at European level. This is thanks to the great three chairpersons that YEMCo has seen. In YEMCo, you do an

analysis of all key areas in relation to the meat industry (e.g. consumption pattern, retail, technology, international trade, food safety etc.). YEMCo members develop methods and models to increase competitiveness and profitability of the members enterprises and the European meat industry, this is something to be kept and valued. Finally, YEMCo helps to maintain a wide network of young professionals in the European meat industry, allowing for cross-border cooperation and greater business opportunities. For this the YEMCo conference are crucial. He wished for YEMCo to continue to grow in the next decade. HAPPY BIRTHDAY!

Looking back of 10 year successful YEMCo conferences, Paddy Browne – 1st YEMCo President

The first president / chairman of YEMCo recalled how he came to form YEMCo. About 12 years ago he was invited to visit different companies and different countries across Europe. Many people have become very good friends since then. On one of the junior trips, President Spanghero wanted him to create the Young European meat committee. They decided to hold a conference in Tours, France in a great Château. After the first conference, they created a Board. They made a point to stay away from the political debates and discussions. He grew YEMCo from there, visiting Belgium, Denmark, Italy, Spain, France, Germany, The Netherlands and so on in the process. He concluded: "We might be from different nationalities, from different countries but we all are from the same industry. I benefited from these exchanges and the different positions expressed". Friends of YEMCo coming to the conferences should always learn from the visits. For long period, he considered YEMCo to be « his baby ». But now it is in good hands.

Unveiling of New YEMCo logo, Philippe Borremans – 2nd YEMCo President

Phillippe Borremans stated that for the second decade of YEMCo the logo had to be updated. He said criteria for the new logo should be modern, young and innovative. The logo should have a link to Europe, a link to the meat industry and show that we are a « thinking-tank ». He asked if all species should be represented. He explained that a survey of participants had been organized and during lunch, he had counted the submissions. Then he presented the three different logos which did not make it.



He can now present the winning logo, which is from now on the new YEMCo logo :



Young European Meat Committee

Events that shaped the meat industry – current YEMCo President, Eva Moser

Eva Moser gave an amusing Power Point Presentation which looked back at some of the key events which shaped the European Meat Industry.

[\[Click here to access the Power Point Presentation\]](#)

Closure of the YEMCo Conference and outlook by Eva Moser

Eva Moser then closed the conference and recalled that the next meeting would be in Weinfeld in September.

Pictures

For all pictures of the event: [click here](#)

Networking evening



YEMCo allowed for the wide network of young professionals in the European meat industry to grow during a social evening with Greyhound Racing at Shelbourne Park. Greyhound racing was a great way to spend an evening out in Dublin. It was a very social evening out, it was great fun and some participants even won a few quid. This included the dinner.

Accompanying Programme

There was also a very interesting accompanying programme for participants. On Friday, there was visit to the Guinness Storehouse and a visit to Grafton Street – Dublin’s premier shopping district (Free Time). This was completed by a special Tour of Dublin City, the so-called Dublin Viking Experience. On Saturday there was a visit to historic Wicklow Gaol for guided tour of the museum, inhabited by the wax figures depicting prisoners who were jailed there over the last 200 years. The group then arrived at Powerscourt House and Gardens. Powerscourt is one of Europe’s great treasures and Ireland’s most famous House and Gardens. Gracing the Wicklow Mountains, 20km from Dublin. There was also a shopping opportunity at Avoca Handweavers at Powerscourt.