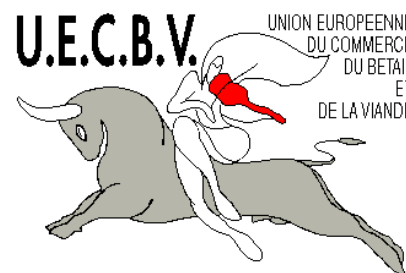
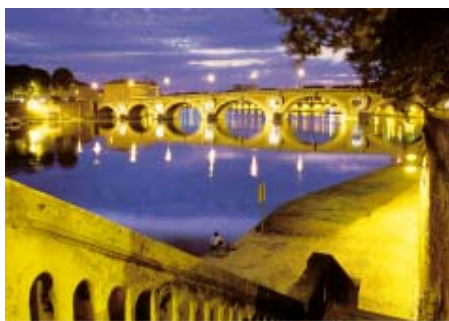


MINUTES



YEMCo Conference TOULOUSE, France 3-4 April 2009

MINUTES

The YEMCo Conference was sponsored by:



“Building the Future: Strategies of the European Meat Industry”

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FRIDAY 3 APRIL 2009 – PROFESSIONAL VISITS



After early breakfast, the group of Young professional of the European Meat Industry left for Castres to visit to Bigard Slaughterhouse and the Slaughtering, cutting and packaging facilities « Canards Gras et Lapins » of "[Les Fermiers Occitans](#)" - a subsidiary of Arterris Co-Operative. The Castres slaughterhouse is a specialist in ovine slaughtering and cutting, which YEMCo participants were able to see, next to Beef cattle slaughtering. [BIGARD](#) also offers a wide range of hides thanks to the reach of its supply zones. YEMCo participants also visited this part of the factory. They were able to understand better how hides are created and salted, how they are transported in lorries or containers and are stored in refrigerated zones at a temperature ranging between 8 and 10°C.

At "Les Fermiers Occitans" the visit of the slaughtering process was followed by tasting of the original Frois Gras – a true highlight of the visit. Many YEMCo participants bought a souvenir of the delightful food home with them. If you want to buy more, order it online: [Click here](#)

Next, a visit to [Spanghero S.A](#) in Castelnaudary, the self-proclaimed "Capital of Cassoulet", took place where the youngsters of YEMCo could see how the **REAL** Cassoulet of Castelnaudary was made. During the visit, it was shown that Cassoulet is also sold in France as a commercial product in cans and can be found in supermarkets, to which Spanghero SA supplies to. The group was then honoured by the presence of UECBV President Laurent Spanghero, who invited them to lunch and a really tasting experience of Cassoulet. **Cassoulet** (from Occitan *caçolet*) is a rich, slow-cooked bean stew or casserole originating from this region. Numerous regional variations exist, but are made with white beans (*haricots blancs*, *lingots*), duck or goose confit, meat and sausages. In the cassoulet of Toulouse, the meats are pork and mutton, the latter frequently a cold roast shoulder. The Carcassonne version is similar but doubles the portion of mutton and sometimes replaces the duck with partridge. The cassoulet of Castelnaudary uses a duck confit (duck cooked for several hours in its own fat) instead of mutton and serves it in a special dish (the "cassole").



Back in Toulouse, the group visited the AIRBUS facilities and had a guided tour of the production site. There was a presentation on the AIRBUS A380 programm and a coach tour outside the Jean-Luc Lagardère facility. Participants also entered the site and discovered, from a facility-integrated lookout, the general test stations, the exterior test stations, and got a general view over the whole site. Dinner took place at the « Les Caves de la Maréchale » in centre Toulouse which have an opportunity for animated debate and networking.

SATURDAY 4 APRIL 2009 – CONFERENCE DAY



Eva Moser, President of YEMCo opened the conference, which was followed by welcoming words. Eva Moser welcomed the president of the UECBV, Mr. Spanghero and thanked the French meat association and the organizers and companies. She thanked the Spanghero company for the hospitality and she thanked the long term sponsor Cryovac. In the first time in history they saw rabbit and duck slaughter and ate famous local dishes. Mr. Douzain from the French Meat Industry Federation (FNICGV) also welcomed participants

Introducing the theme of the conference, Mrs. Moser said despite the financial and economic crisis, the meat industry never cried out for help. The meat industry always found the way out by itself. Therefore the theme of the conference was “Building the future: strategies of the European meat industry” which saw several case studies and testimony of representatives of the poultry meat, beef, and pig meat industry in Europe.

Jean-Marc Spanghero spoke first on the future strategy of the famous SPANGHERO Company. For them, the focus is on “ready meals” as another activity besides slaughtering and cutting. In Castre there is no breeding activity and diversification needed to be added to the portfolio mix. Consumer behavior also showed that there is a need for more processed products and a certain specialization was needed: “We need to focus our means on processing, which will be the future. We are in a good region and develop products which are close to the identity of the French south west, we have a good image and a good brand, so we invested in the factory and develop the production of cooked meals” he stated. Tomorrow, meat will be sold in different forms and in the future there will be even more added value products ready meals rather than a single piece of meat.

The approach of the Spanghero Company can be summed up in parts:

- 1) local and regional differentiation
- 2) focus on processed meals ready meals

There are partnership agreements and some traditional activities which Spanghero did in the past are now outsourced. Partners are therefore important. Spanghero does not sell carcasses anymore: “The partners are supplying us with raw materials and supply us with good quality meat. The supply chain is therefore very important”. For Mr. Spanghero, specialists should do their job and his company will focus on prepared meals. There is more and more specialization you have to make choices! For him, companies need not to be overly complex anymore.

Next, Mr. Francis Lamisse, General Manager, Arterris Co-Operative, (turnover: EUR 600 million; staff: 1,110; members: 21,000) took the floor. As a Cooperative group the company is a special enterprise due to its structure but the challenges are the same. He talked about the regional distribution in the South of France and mentioned the fundamentals by which the company operates: He described his company based on many values, meanings or appeals, using the regional advantages and local specifics to create various different products. Here the closeness to the Mediterranean basin also helps. Due to the expertise, the capacity for negotiations with officials and politicians in the region is strong, a necessity for good and lasting business expansions. Furthermore, a strong financial background helps with investments, ensuring competitiveness and promoting innovation. He then described the procedure for correct and successful mergers of several of these companies, a clear trend in the meat industry in South France. Here, the need for a proper management of the newer and larger cooperative group was needed.

[More details can be found on the Power Point Presentation](#)

Mr. Gérard Cladière, CEO, DEFIAL (Bigard-Socopa group) rounded up the presentations looking at BIGARD. As the leading processor of meat in the French private sector, BIGARD has been cultivating the “art of meat” for over 30 years. As such, BIGARD is a group of slaughterhouses which are specialized in meat-processing and the manufacturing of fresh and frozen products. Today, the group comprises a number of competitive processing and slaughter plants, spread across the whole of France. All Bigard industrial sites fulfil the same requirement, i.e. they fully manage the supply chain, from the selection of animals to their slaughter and from carving to the manufacturing of processed products. Bigard has 17 industrial sites and 4 company subsidiaries, they are spread out across the country. Bigard offer retailers a choice of almost 130 products, including beef burgers, meat skewers, carpaccios and sausages. Mr. Cladiere stated: « We constantly strive to innovate with our Research and Development team, coming up with new concepts which help us remain the market leaders »



[More details can be found in the Power Point Presentation](#)

His presentation was followed by a Q&A session with the audience. One question related to the dominance of the retail sector and its affect to BIGARD. Mr. Caldière responded that there is a need to better negotiate prices, there should be better bargaining power. Prices are currently being imposed by the retailer and they make huge margins on meat products. A price observatory should be established. Big retailers have polluted the market and now they blame the European Meat industry for the high prices. The price that imposed on the meat industry are too high.

What is a successful strategy in the Meat Industry, even if you are an SME? If you can differentiate yourself from your competitors in terms of products or services, then there is an evaluation for SMEs and there is a chance, but there is little of this currently. Possibly, the European Commission with its many initiatives could support the right framework for foster innovation and entrepreneurship in the European Meat Industry. We should participate in such an initiative. The specifics of the region and special adaptation could be used to be a successful strategy as well. If the big companies do not use their seize to block markets and if the small companies are not to play with the big one and concentrate of their specialty, then there could be a market for them in the future. Do away wit the losses by counting better. If there is no specialization then the process of concentration will continue, SME’s will not ne able to resist. Key elements are partnership with the big players, proximity of service and a certain intelligence to stay in the market. We see lees and less meat and there is competition form poultry and fish which need to be taken into consideration.

After lunch, the presentations continued. Christine Walsh from the Agriculture and Horticulture Development Board (AHDB) in the UK presented “Strategic planning for the meat industry in turbulent times”. She explained how the Young Leaders Course, the Fellowship in Operations Management for the Meat Industry was developed to make the next generation of leaders in the meat industry more competitive and enable then to bring lasting profit to the companies. She showed with clear examples of these years’ graduates how the programme helped to increase income and reduce costs, how savings of £130,000 could be made, how sales could be doubled, and equivalent to €1,000,000 pa.

[More details can be found in the Power Point Presentation](#)



Finally, Francois-Xavier Méric, from YEMCo's long term sponsor Cryovac presented the packaging process optimization through operation monitoring. For more than half a century Cryovac has been a worldwide leader in perishable food packaging technologies. Working closely with the food processing, foodservice, and supermarket industries they have developed packaging systems to help make distribution and merchandising of fresh foods efficient and effective. The innovation of Cryovac is certainly their Case-Ready concept - centrally wrapped packages for display without further preparation at retail. Benefits to processors, retailers and consumers: cost savings, enhanced quality control, traceability, extended shelf-life and convenience.

[Find out more – visit the Webpage](#)

This was followed by a presentation on the next YEMCo Conference in Rotterdam, November 2009

[More details can be found in the Power Point Presentation](#)

Whilst some YEMCo members enjoyed Indoor Karting in the afternoon, the YEMCo Board met for a Board Meeting consisting of Board Members, Regional Coordinators, Advisers / see list below). The conclusions are available separately.

ACCOMPANYING PERSON PROGRAMME

On Friday and Saturday a detailed Guided sightseeing tour by foot in Old Toulouse had been arranged leading through narrow streets and squares, discovering mansions, religious buildings and lots of remarkable edifices such as Saint-Sernin Basilica ([click here to go to the web page](#)) or the Jacobins Convent ([click here to go to the web page](#)) etc. In the afternoon, there was a guided tour of the Augustins Museum (Museum of Fine Arts) ([click here to go to the web page](#)). This Museum displays very unique sculptures and paintings collections ranging from the XIIIth century to the XXth century. The accompanying persons also participated in the visit to AIRBUS. There was enough time to explore the city alone and go for some serious souvenir hunting and shopping.

FOR ALL PHOTOS



Visit the Webpage:

<http://picasaweb.google.com/arne.mielken/YEMCoToulouse?authkey=Gv1sRgCKG50qLm3eGTpAE&feat=directlink>

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