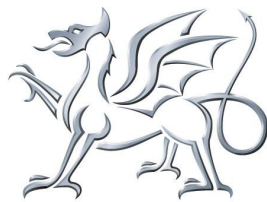


# Strategic Action Plan for the Welsh Red Meat Industry



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government



## 2009-2010

## Annual Monitoring Report

## BACKGROUND

The Strategic Action Plan for the Welsh Red Meat Industry, which was developed by Hybu Cig Cymru - Meat Promotion Wales (HCC) in close consultation with the Welsh red meat industry and the Welsh Assembly Government, was launched by Elin Jones AM Minister for Rural Affairs on 28 April 2009.

The following vision for the industry is identified within the Action Plan - *a profitable, efficient, sustainable and innovative Welsh red meat industry, which responds competitively to ever changing market trends and benefits the people of Wales.* In order to achieve this vision, the Action Plan provides strategic direction for the Welsh red meat industry by identifying strategic objectives, actions and outcomes which seek to address the challenges and take advantage of the opportunities facing the industry.

The Action Plan also identifies that close partnership working between the Welsh Assembly Government, HCC and the Welsh red meat industry is essential to progress the objectives and implement the actions. As a result arrangements with HCC for implementation, monitoring and evaluation of this Action Plan have been put in place.

## MONITORING AND EVALUATION OF THE ACTION PLAN

A Monitoring Sub Committee of the HCC Board met for the first time on 13 August 2009 and included representatives of the Welsh Assembly Government, HCC Board members and representatives of the Welsh red meat industry. Committee members are listed in Annex 1. This Committee agreed a framework for reporting and measuring progress of the Action Plan and this annual report is the first output of those activities.

The annual report is issued following the collation of relevant data to coincide with year-end of each financial year.

In order to meet the needs of the industry and to achieve the objectives identified by the Action Plan, HCC issued a 3-year Corporate Plan at the end of April 2009, which summarised the planned delivery by HCC between 2009 and 2012. Internal business plans within the Welsh Assembly Government also identify specific targets against actions where the Assembly is identified as a responsible body.

The key Actions identified by the Action Plan are as follows, and delivery against these overarching Actions is outlined below:

1. Undertake **promotion** of Welsh red meat products amongst the supply chain;
2. Undertake **research activity** on behalf of the Welsh red meat industry and provide **training** to meet the needs of the Welsh red meat industry;
3. Encourage best practice in regard to **animal health and welfare**;
4. Minimise the environmental impact of Welsh red meat production and seek **environmental protection**;
5. Encourage **new entrants** into the Welsh red meat industry;

6. Seek to enhance Welsh red meat **supply chain** transparency and **integration**;
7. Support Welsh red meat **product development** (e.g. new products, alternative uses of products and new markets);
8. Collate and analyse **information and advice** and target its **dissemination** to the Welsh red meat industry;
9. Advise, assist and influence **regulatory development**; and
10. Undertake **contingency planning** to assist the Welsh red meat industry during times of difficulty (including animal health and market impact).

### SUMMARY OF ACHIEVEMENTS AGAINST ACTIONS (2009-2010)

The following tables highlight some of the achievements against Actions for 2009-2010, with the detailed achievements recorded in Annex 2.

Achievements incorporate the activities delivered by all parties in the Welsh red meat supply chain - the Welsh Assembly Government, HCC and industry stakeholders.

Actions	Achievements
<b>1. Promotion</b>	<p>Advertising awareness (within targeted TV regions) of Welsh red meat increased to 32 percent</p> <p>Three point of sale materials for retailers and two kits for independent retailers disseminated by HCC</p> <p>Welsh red meat exports increased by 20 percent in value and 10 percent in volume over 2008/2009</p> <p>The Local Sourcing Action Plan was launched by the Welsh Assembly Government</p> <p>The True Taste Awards in November 2009 (organised by the Welsh Assembly Government) received 139 meat entries</p> <p>HCC promoted Welsh red meat brands by means of integrated advertising - Welsh Lamb and Welsh Beef TV advertising undertaken</p>

Actions	Achievements
<p><b>2. Research activity and training</b></p>	<p>Portfolio of 12 Research and Development projects focused on supporting the Welsh red meat industry maintained by HCC</p> <p>Consumer research commissioned by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Assembly Government and the European Union) which reported that the most important demand drivers for lamb consumers were taste (12 percent) and tenderness (11 percent) and that their choice of meat for special occasions is beef (54 percent) and lamb (42 percent)</p> <p>Welsh Assembly Government officials continue to liaise with Defra and external organisations to discuss Welsh research priorities and actively influence programme direction which are relevant to the red meat sector e.g. Integrated Farming Systems, Animal Health &amp; Welfare, Resilient Food Chain, Technology Strategy Board, Levy Boards, Research Institutes and Research Councils</p> <p>20 beef and lamb selection for slaughter courses for producers delivered by HCC at abattoirs and livestock markets (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Assembly Government and the European Union)</p> <p>The Welsh Assembly Government through Farming Connect provided tailored one to one business and technical guidance and environmental advice from private sector organisations on a variety of topics via the Whole Farm Plan and the Farm Advisory Services</p>
<p><b>3. Animal health and welfare</b></p>	<p>The Welsh Assembly Government acts as secretariat to the Animal Health and Welfare Steering Group (on which HCC also sits) and monitors progress against the aims of the strategy</p> <p>HCC published in excess of six booklets and leaflets focused on animal health and welfare for sheep and beef farmers (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Assembly Government and the European Union)</p> <p>HCC offered support for Johne's Disease testing on beef cattle in Wales (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Assembly Government and the European Union) - 87 farmers expressed an interest (to test 4,439 cattle)</p> <p>Defra undertake regular surveillance for diseases across GB and disseminate the findings to the Welsh Assembly Government and stakeholders</p>

Actions	Achievements
<p><b>4. Environmental protection</b></p>	<p>Development of an Environmental Roadmap for beef and sheep production underway collaboratively by the Welsh Assembly Government and HCC</p> <p>The Farming Connect Red Meat Development Programme, delivered by HCC, promotes new ideas and initiatives through its network of demonstration farms, discussion groups and knowledge transfer officers and works alongside the Climate Change Development Programme (delivered by Canolfan Hinsawdd Cymru) to help producers prepare for the impact of, and mitigate against, climate change</p> <p>The Welsh Assembly Government and HCC continue to fund work on a collaborative basis at Bangor University to investigate an alternative method for on-farm storage of fallen stock on farms</p> <p>The Welsh Assembly Government are engaged with the Land Use Climate Change Group to find ways to reduce greenhouse gas emissions</p>
<p><b>5. New entrants</b></p>	<p>4 PhD's and MSc's commissioned and 13 studentships maintained by HCC</p> <p>Approximately 500 young farmers (aged under 40) took part in Farming Connect Red Meat Development Programme open days, discussion group meetings and events</p> <p>The Welsh Assembly Government through the Farming Connect Skills Development Programme (delivered by Lantra) provided practical and regulatory training to raise awareness of career opportunities in the Welsh red meat industry</p>
<p><b>6. Supply chain integration</b></p>	<p>Food Tourism Strategic Action Plan launched by the Welsh Assembly Government</p> <p>8,000 copies of quarterly information bulletin sent out by HCC to producers through abattoirs in Wales to encourage supply chain cooperation (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Assembly Government and the European Union)</p> <p>The Welsh Assembly Government support projects within the Rural Development Plan for Wales 2007-2013 that seek to conserve economic and environmental resources and enhance supply chain integration - 28 projects have been approved, totaling over £25 million of grants</p>

Actions	Achievements
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>7. Product development</b></p>	<p>The Food Technology Centre (Llangefni), the Food Centre Wales (Horeb) and the Food Industry Centre (Cardiff) have supported producers and retailers in fostering the development of the Welsh food processing industry through consultancy, training and research</p> <p>Market opportunities for skin-on sheepmeat report published collaboratively by HCC and the Food Standards Agency Wales</p> <p>The Welsh Assembly Government provided financial assistance for capital and revenue investments that add value to agricultural products to 13 red meat business</p> <p>HCC awarded 1 scholarship to study grassland management in New Zealand and coordinated 5 study tours to Europe for Welsh red meat producers (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Assembly Government and the European Union)</p>

<p><b>8. Information and advice dissemination</b></p>	<p>The Welsh Assembly Government published Gwlad monthly, to disseminate information and advice to over 30,000 individuals in the Welsh agricultural industry</p> <p>HCC targeted relevant trade, consumer and general media, through 123 press releases, 26 specialist articles, 5 on-site visits by farming and other trade journalists and 10 press events</p> <p>Dissemination of information and advice by HCC through literature, the HCC websites and attendance at events and shows (partly funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Assembly Government and the European Union) - monthly Market Bulletins, in excess of 200 publications available, 'industry facing' and 'consumer facing' internet sites maintained and approximately 100,000 liveweight price text messages issued</p> <p>A network of demonstration farms, development farms and discussion groups maintained by HCC (as part of the Welsh Assembly Government Farming Connect Red Meat Development Programme)</p> <p>10 meetings and events focused on genetic improvement in beef and sheep delivered by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Assembly Government and the European Union) - 489 beef and sheep farmers received support for performance recording, Artificial Insemination or Embryo Transfer</p> <p>8 major national and international events and shows attended by HCC</p> <p>6 events for primary school pupils and 4 events for secondary school pupils undertaken by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Assembly Government and the European Union)</p>
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Actions	Achievements
9. Regulatory development	<p>A two year action research project by the Welsh Assembly Government, involving 4 local authorities, commenced in September 2008 to develop and test the guidelines for implementing the food and nutritional standards proposed in Appetite for Life and learn lessons from this project to inform wider application across all maintained schools in Wales</p> <p>HCC responded to 41 relevant Government and industry consultations, aimed at influencing policies and strategies affecting the Welsh red meat industry</p> <p>Sponsorship of five events undertaken by HCC to raise awareness of Welsh red meat to politicians and policy makers in Cardiff Bay, London and Brussels</p>
10. Contingency planning	<p>The Welsh Assembly Government Framework Response Plan and Overview of Emergency Preparedness for Exotic Animal Disease are reviewed annually</p> <p>Market impact contingency plan prepared by HCC</p>

## FOCUS FOR DELIVERY OF THE ACTION PLAN IN 2010-2011

In order to monitor progress of delivery against Actions in 2009-2010, the Monitoring Sub Committee agreed to split the Actions into the following four categories for delivery. These are colour coded in the tables in Annex 2.

### 1. Actions which have been fully completed

As some of the Actions have been fully achieved in 2009-2010, there is no requirement for activities to be delivered in 2010-2011. These Actions are as follows:

- Pilot a project to enhance supply-chain transparency.
- Undertake an evaluation of market opportunities for red meat in the 'ethnic' market.
- Investigate the market opportunities for dairy-bred bull calves.

### 2. Actions which have been achieved but which require ongoing delivery

Many of the Actions are an ongoing requirement to support the Welsh red meat industry and as such there is a requirement for the same activities to be delivered in 2010-2011.

### 3. Actions which have been achieved but which require an increased emphasis

The Committee has identified Actions where there is a requirement for increased activities to be delivered in 2010-2011. These Actions are as follows:

- Support the retail and food service sectors in Country of Origin labelling and in promoting the consumption of branded Welsh red meat (at home and in export).
- Encourage procurement of Welsh red meat by Local Authorities, colleges, the army, hospitals, event and show organisers and other public sectors.

- Provide training to meet the needs of the industry and enhance the skills base, including enabling the supply-chain to meet market requirements; encouraging best practice, business management, sales and marketing; support work based learning (e.g. butchery) in business operators.
- Assist producers in adapting to and mitigating climate change, by adapting production systems, conserving soil carbon, reducing nitrous oxide and methane emissions, reducing flood risks and conserving biodiversity.
- Deliver a range of educational and health programmes on the importance of Welsh red meat in the diet and raise consumer understanding of how meat is produced (e.g. school road shows, farm visits and cooking demonstrations).
- Ensure interaction with policy makers to ensure Welsh interests are protected.

#### **4. Actions which have not been fully achieved**

In some instances Actions have not been fully achieved in 2009/2010 as delivery is still underway. These Actions are as follows:

- Develop PGI status for Welsh Pork.
- Develop an environmental impact 'roadmap' for Welsh red meat production.
- Ensure all employees of the red meat processing sector are treated in accordance with the Department for Health's Single Equality Scheme.
- Support the uptake of automated carcass grading systems in Welsh abattoirs.
- Investigate the links between cross compliance and farm assurance to ensure there is no duplication or additional burden.

## **Annex 1**

### **Action Plan Monitoring Sub Committee Members**

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#### **HCC Board Members**

Huw Evans

Nic Lampkin

Glyn Roberts

Rees Roberts (*Monitoring Sub Committee Chair*)

Wyn Williams

#### **Industry Representatives**

FUW Livestock, Wool & Marts Committee Chair - Aeron Prysor Jones

NFU Cymru Livestock Board Chair - Peter Davies

#### **Welsh Assembly Government Officials**

Food, Fisheries and Market Development Division - Paula Whitfield

Technical Services Division - Barbara McLean

#### **HCC Executives**

Bryan Regan





Kirsten Smith

## **Annex 2**

### **Achievements against Actions (2009-2010)**

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In the following tables achievements against actions (April 2009 to March 2010) are colour coded to show the progress of delivery.

-  Signifies that Actions have been completed in 2009/2010
  
-  Signifies that Actions have been achieved in 2009/2010 but that ongoing delivery is required for 2010/2011
  
-  Signifies that Actions have been achieved in 2009/2010 but that increased emphasis is required for 2010/2011
  
-  Signifies that delivery is underway but that Actions have not been fully achieved in 2009/2010

## Annex 2 - Achievements against Actions (2009-2010)

Objective	Action	Progress	Achievements 2009/2010
1. Promotion	To advertise and promote Welsh red meat and promote the industry overall		Advertising awareness (within targeted TV regions) of Welsh red meat increased to 32% (from 28%) - <i>Market Tools and Beaufort Research for Hybu Cig Cymru - Meat Promotion Wales (HCC)</i>
			Awareness amongst Welsh consumers of types or brands of Welsh food and drink increased to 87% (from 85%) and awareness amongst consumers in the rest of the UK at 52% - <i>Beaufort Research for the Welsh Assembly Government (WAG)</i>
			57% and 43% of Welsh consumers spontaneously mentioned Welsh Lamb and Welsh Beef respectively when asked about Welsh food and drink (from 55% and 40%), and 28% and 4% of consumers in the rest of the UK spontaneously mentioned Welsh Lamb and Welsh Beef respectively when asked about Welsh food and drink - <i>Beaufort Research for the WAG</i>
			Awareness of 'Wales the True Taste' brand amongst Welsh consumers and consumers in the rest of the UK at 16% and 2% respectively - <i>Beaufort Research for the WAG</i>
			6% of GB consumers said they recognised the PGI logo when prompted, in 2007 - <i>Beaufort Research for HCC</i>
			Consumer PR for Welsh red meat delivering coverage of 10 million opportunities to see - <i>Ogilvy Action Research for HCC</i>
			Sponsorship of 3 culinary teams/ events (the Welsh Culinary Team, the Chef of Wales competition and the Battle of the Dragon competition) by HCC
			Sponsorship of 19 industry related events (including county shows, Farmers' Union Wales conference, NFU Cymru conference and National Sheep Association Sheep 2009 event) by HCC
			The True Taste Awards in November 2009 (organised by the WAG) received 860 entries in 27 categories (including 139 meat entries)
			The True Taste Awards winner in the red meat category in the 2009/2010 awards promoted by the WAG through a PR agency throughout the UK, through distribution of the Producer Directory and the True Taste magazine (50,000 copies distributed across Wales)
			The WAG attended 12 exhibitions and events, during which 7 red meat businesses exhibited 17 times
			3 business development programmes (via Levercliff and Menter a Busnes) initiated by the WAG
Support the retail and food service sectors in Country of Origin labelling and in promoting the consumption of branded Welsh red meat (at home and in export)		HCC worked with 5 key account retailers and 2 food service operators using where necessary sales promotion programmes to achieve enhanced on-pack and menu identification	
		3 point of sale materials developed by HCC for retailers (Summer 2009, Autumn/ Winter 2009 and Spring/Summer 2010) and 2 kits for independent retailers disseminated by HCC	
Open up new markets for Welsh red meat (at home and in export), where appropriate, for prime red meat, veal, mutton, etc.		Welsh red meat exports increased by 20% in value and 10% in volume over 2008/2009 - <i>HCC Calculations based on HM Revenue and Customs data</i>	
		5 export events/ markets attended by HCC and Welsh exporters (Dubai [International Business Wales - IBW/Wales stand], Germany, Hong Kong [IBW/Wales stand], Italy and Spain [IBW/Wales stand])	
		3 exploratory market visits and inward trade missions undertaken with support from HCC (Belgium, Finland [IBW/UK Trade & Investment] and Italy)	
		Market access discussions undertaken with Defra by IBW and HCC for Libya, Saudi Arabia, Japan and China export markets	
		HCC membership of UK Export Certification Partnership (UKECP) which seeks to open up markets for UK exports	
Encourage procurement of Welsh red meat by Local Authorities, colleges, the army, hospitals, event and show organisers, other public sectors, etc.		HCC attended a 2 day event with a school meal provider in Anglesey to encourage sourcing of local Welsh produce	
		The WAG have been working on the Ryder Cup 2010 campaign and involved in the London Olympics 2012 preparations to encourage Welsh red meat companies to be involved	
		The WAG encouraged local sourcing of products through 8 'meet the buyer' events across Wales and through 2 dedicated public sector procurement 'meet the buyer' events	
		The Local Sourcing Action Plan was launched by the WAG - ongoing monitoring and annual report of success	
		Contact with Welsh show and event organisers made by HCC to encourage use of Welsh red meat	
		One to one contact with 10 public procurement bodies in Wales undertaken by HCC to encourage usage of Welsh red meat	
Promote the value of the Welsh red meat industry and products, livestock breeds, livestock genetics and live exports		66% of ABC1 respondents (Meridian area) regard Welsh Lamb as a premium brand (from 60%) - <i>Market Tools for HCC</i>	
		HCC promoted Welsh red meat brands by means of integrated advertising (TV, print media and digital), sales promotions and PR - Welsh Lamb TV advertising in Meridian, Central and Wales TV regions undertaken by HCC between September and November 2009. Welsh Beef TV advertising in the Wales TV region undertaken by HCC in December 2009	
		The WAG promoted 10 promotional grant applications which encompassed red meat products as part of their activity e.g. as part of a wider exhibition or event	
		Marketing campaign for Welsh Pork undertaken by HCC with Welsh pork producers - activities included a pork producers study tour to Italy and the development of marketing toolkits for 9 producers across Wales	

	Objective	Action	Progress	Achievements 2009/2010
1. Promotion (continued)	To protect Welsh red meat and enhance the Welsh red meat brands	Develop PGI status for Welsh Pork		PGI specification for Welsh Pork under development by HCC
		Protect and enforce the PGI Welsh Lamb and Welsh Beef designations, to ensure compliance		All abattoirs and processors that wish to brand Welsh Lamb and/ or Welsh Beef inspected annually by HCC – 51 annual inspections and 8 unannounced inspections undertaken
				Enforcement authorities provided with ongoing support by HCC in regard to Welsh Lamb and Welsh Beef
				Enforcement authorities undertook regular inspections of Welsh Lamb and Welsh Beef in the retail sector - enforcement action undertaken when appropriate

	Objective	Action	Progress	Achievements 2009/2010
2. Research activity and training	To ensure the Welsh red meat industry has access to up to date and relevant information and advice to ensure informed decision making and support the improvement of business efficiency	Undertake relevant, cost effective research activity which meets the needs of the Welsh red meat sector whilst ensuring there is no duplication		Portfolio of 12 Research and Development (R&D) projects focused on supporting the Welsh red meat industry maintained by HCC. Projects quarterly evaluated by the HCC R&D Advisory Committee (which is made up of the WAG, HCC and industry representatives). Projects include research into new forage varieties to address future climate change issues and research into genetic markers of sheep to evaluate potential for increasing meat yield
				As part of the Defra managed England and Wales R&D budget WAG officials liaise with Defra to actively influence programme direction and to ensure Welsh research needs are considered. R&D programmes of relevance to the Welsh red meat sector include Integrated Farming Systems, Agriculture and Climate Change, Resource Efficient and Resilient Food Chain and Animal Health and Welfare
				WAG engage with external organisations to discuss Welsh research priorities and actively influence programme direction and encourage collaboration, these include Levy Boards, Research Institutes throughout the UK, the Scottish Government and Research Councils. As part of this engagement, WAG is represented on the Agricultural & Horticultural Research Forum group which involves UK levy boards, Government and Research Councils
				The WAG engage with the Technology Strategy Board to develop the Sustainable Agriculture and Food Innovation Platform which brings together Government, businesses and researchers to stimulate the development of new technologies - 3 meetings attended by the WAG to ensure complimentary research activities across England and Wales
				In general terms the research and survey work funded by the Food Standards Agency (FSA) is focused on tackling gaps in the evidence base to help the Agency understand food issues and meet its policy aims and objectives. The FSA does not provide research grants, but contracts research groups to address specific questions aimed at producing the background evidence on which it can base its policies. The FSA's portfolio of over 150 research projects includes the areas of nutrition, diet and food choice, foodborne illness, chemical contaminants, TSEs, radiological safety and improving consumer choice and standards of food production
				Market research commissioned by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the European Union [EU]) - Lamb accounts for a 16% share of UK red meat volume sales. 49% of retail lamb sales were to social class ABC1. 50% of lamb sold in the UK were chop steaks and leg roasts. 41% of volume sales of lamb were in London and the Midlands <i>Kantar Worldpanel for HCC</i>
				Consumer research commissioned by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU): Lamb consumers reported that the most important demand drivers were taste (12%) and tenderness (11%) and that their choice of meat for special occasions is beef (54%) and lamb (42%) - <i>Beaufort Research for HCC</i>

Objective		Action	Progress	Achievements 2009/2010
2. Research activity and training (continued)	To support the improvement of business efficiency of the Welsh red meat industry	Provide training to meet the needs of the industry and enhance the skills base, including enabling the supply-chain to meet market requirements; encouraging best practice, business management, sales and marketing; support work based learning (e.g. butchery) in business operators; and communicate the importance of better understanding ways to control/ reduce cost of production and developing consistent quality products that meet market needs		20 beef and lamb selection for slaughter courses for producers delivered by HCC at abattoirs and livestock markets (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU). Selection for slaughter competitions undertaken by HCC at 3 events (including the Royal Welsh Show and Winter Fair)
				41 development projects agreed by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU), disseminating information to the industry (focused on genetic improvement, climate change/ environmental issues, animal health and welfare, animal and human nutrition, product quality and safety, traceability and socio-economics)
				The WAG through Farming Connect provided tailored one to one business and technical guidance and environmental advice from private sector organisations on a variety of topics (including feeding and breeding for improved performance, reducing feed costs by growing more grass or supplementary crops, making better use of fertiliser and farm manures, improving animal health, financial planning to forecast cashflow and profit, environmental protection and enhancement, succession planning, environmental management and land management, farm diversification, energy conservation and generation and climate change) via the Whole Farm Plan and the Farm Advisory Services
				Lantra (the industry body supporting skills, education and training for the UK's environmental and land-based industries) works closely with industry, education and the government to give employers a real influence over skills in the UK
				The WAG through the Farming Connect Skills Development Programme (delivered by Lantra) provided practical and regulatory training to assist in improving working practices, complying with legislation and encouraging diversification on a variety of topics (including sheep shearing, foot trimming, food preparation and hygiene, trailer towing, safe use of pesticides and safe use of veterinary medicines)
				The Farming Connect Red Meat Development Programme, delivered by HCC, promotes new ideas and initiatives through its network of demonstration farms, discussion groups and knowledge transfer officers - 1,678 beneficiaries attended events
				Quality Management Procedures training programme for small and medium sized abattoirs and processors initiated by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU). Contact with 19 Welsh plants undertaken
				Improve (the Food and Drink Sector Skills Council) developed the Sector Performance Standards (also known as National Occupational Standards [NOS]) for the food and drink industry. They provide a breakdown of the skills and knowledge needed to carry out a wide range of different functions in the red meat industry including preparation and abattoirs, production butchery and retail butchery. The Sector Performance Standards have also been used by Improve to create 'Units' for a variety of nationally recognised qualifications (including families of Improve Proficiency Qualifications [IPQs] and Improve Vocational Qualifications [IVQs]). These Qualifications form the basis of apprenticeships
				The WAG collects post-16 education and training data via the Lifelong Learning Wales Record (LLWR). There were 85 Foundation Modern Apprenticeship (level 2) programmes in the Meat and Poultry processing sector pursued between August 2008 and July 2009
				14 Electronic Identification (EID) project open days and 2 events involving EID delivered by the WAG and HCC. Interim and Final reports published

Objective		Action	Progress	Achievements 2009/2010
3. Animal health and welfare	To promote the Welsh red meat industry overall	Support the delivery of the Animal Health and Welfare Strategy: Wales Action Plan		The WAG acts as secretariat to the Animal Health and Welfare Steering Group (on which HCC also sits) and monitors progress against the aims of the strategy
				Through the Farming Connect Red Meat Development Programme, HCC prepare animal health plans on Demonstration Farms in conjunction with the farm vet. Progress is benchmarked over three years and information on how to make improvements disseminated to the industry. Messages about the importance of effective biosecurity are also highlighted
				The WAG work with Defra and the other Devolved Administrations on implementing the Regulations that support the amended Animal By-Products Regulations. EU Council agreed revised text of ABP Regulations on 07 September 2009. New Regulations which include provision for on-farm containment due to come into force in early 2011
				The WAG engage with external organisations to discuss Welsh research priorities and actively influence programme direction. Programmes include the an Animal Health and Welfare R&D Programme
				The WAG TB Health Check Wales has ensured that 11,761 whole herd tests have been completed and a TB Eradication Plan has been agreed
				HCC published in excess of 6 booklets and leaflets focused on animal health and welfare for sheep and beef farmers, including topics such as controlling parasites, ecto-parasite control, sheep health, liverfluke and psoroptic mange (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU)
				HCC offered support for Johne's Disease testing on beef cattle in Wales (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU) - 87 farmers expressed an interest (to test 4,439 cattle)
				HCC published 5 'Animal Bytes' (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU) - reports which translate technical scientific reports into a farmer friendly format - including articles on animal health and welfare
				HCC published monthly bulletins to highlight topical diseases being faced by the Welsh red meat industry (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU) - including an A-Z guide on diseases facing the industry
	Undertake surveillance and/ or eradication (where appropriate) of disease/ pests likely to impact on the Welsh red meat industry and prevent the entrance of exotic disease (where possible)			
HCC instigated a review of the Parasitology Action Plan for Wales which will initiate suitable projects to develop industry understanding of parasitology issues in Wales (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU)				
Programme of disease surveillance and health benchmarking initiated by HCC aiming to survey all 15 Demonstration Farms in 2010/2011 (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU)				

Objective		Action	Progress	Achievements 2009/2010
4. Environmental protection	To seek to mitigate the Welsh red meat industry's impact on the environment	Support supply chain projects which seek to conserve economic and environmental		The WAG support Supply Chain Efficiencies projects within the Rural Development Plan for Wales 2007-2013 that seek to conserve environmental resources. 28 projects have been approved, totaling over £25 million of grants
		Develop an environmental impact 'roadmap' for Welsh red meat production		Development of an Environmental Roadmap for beef and sheep production underway collaboratively by the WAG and HCC – industry consultations anticipated in 2010
	Facilitate a coordinated approach to water management, pollution control and waste disposal, between industry and relevant private and public sector bodies			The WAG through Farming Connect provided tailored one to one business and technical guidance and practical and regulatory training from private sector organisations on a variety of topics (including making better use of fertiliser and farm manures, environmental protection and enhancement and energy conservation and generation) via the Whole Farm Plan, the Farm Advisory Services and the Skills Development Programme
				The WAG and HCC continue to fund work on a collaborative basis at Bangor University to investigate an alternative method for on-farm storage of fallen stock on farms
				The principal aims of the Environment Agency (EA) are to protect and improve the environment and to promote sustainable development - a coordinated approach to water management, pollution control and waste disposal is encouraged through initiatives, events, publications and PR
				The Farming Connect Red Meat Development Programme, delivered by HCC, promotes new ideas and initiatives through its network of demonstration farms, discussion groups and knowledge transfer officers
	Encourage utilisation of local slaughtering/processing facilities, where appropriate, in order to minimise the environmental impact of movements of livestock to slaughter			HCC supported the improvement of links between abattoirs and producers in their locality through the provision of carcass selection training at all abattoirs and the dissemination of the quarterly bulletin to producers through abattoirs (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU)
	Pursue environmental accreditations at plant level			Environmental accreditations are being pursued by abattoirs and processors across Wales in order to reduce their environmental impacts and costs and improve their company's efficiencies. Areas include implementing an Environmental Management System (EMS) - such as SO 14001 (e.g. the Green Dragon Environmental Standard), EMS auditing, production of Energy Performance Certificates, reducing waste and energy consumption and improved resource efficiency
	Seek to utilise alternative energy sources, where possible (e.g. hydrocarbons and a replacement for Hydrochlorofluorocarbons [HCFC] refrigerants in abattoirs before 2010)			Alternative energy sources are being utilised, where possible by abattoir and processors across Wales to meet Regulatory requirements
	Provision of advice on agri-environment schemes			The WAG through Farming Connect provided tailored one to one business and technical guidance and practical and regulatory training from private sector organisations on a variety of topics including environmental management and land management via the Whole Farm Plan, the Farm Advisory Services and the Skills Development Programme The EA ensure advice on agri-environment schemes is available through events, publications and PR
	Encourage uptake of existing environmental audits available			The EA encourage the uptake of existing environmental audits through the dissemination of information at events and through publications and PR
	Encourage shared practice amongst producers on how individual businesses sustain production whilst delivering positive environmental management			HCC published 5 'Animal Bytes' (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU) - reports which translate technical scientific reports into a farmer friendly format, including articles on environmental issues and climate change The EA encourage shared practice amongst producers through the dissemination of information at events and through publications and PR The Farming Connect Red Meat Development Programme, delivered by HCC, promotes new ideas and initiatives through its network of demonstration farms, discussion groups and knowledge transfer officers
	Seek to add value to the Welsh supply-chain by encouraging efficient disposal of waste materials (e.g. fallen stock, etc.)			Development of the Environmental Roadmap for beef and sheep production - which intends to consider agricultural waste Research undertaken collaboratively by the WAG and Bangor University - bioreduction project The WAG engage with external organisations to discuss Welsh research priorities and actively influence programme direction. Programmes include the Resource Efficient and Resilient Food Chain R&D Programme The WAG through Farming Connect provided tailored one to one business and technical guidance and environmental advice from private sector organisations on a variety of topics via the Whole Farm Plan and the Farm Advisory Services

	Objective	Action	Progress	Achievements 2009/2010
4. Environmental protection (continued)	To seek to mitigate the Welsh red meat industry's impact on the environment (continued)	Assist producers in adapting to and mitigating climate change, by adapting production systems (e.g. encouraging ventilation in sheds, increasing access to shade in the fields, etc.), conserving soil carbon, reducing nitrous oxide and methane emissions, reducing flood risks and conserving biodiversity		The Farming Connect Red Meat Development Programme, delivered by HCC, works alongside the Climate Change Development Programme (delivered by Canolfan Hinsawdd Cymru) to help producers prepare for the impact of, and mitigate against, climate change
				Development of the Environmental Roadmap for beef and sheep production - which will address climate change HCC published 5 'Animal Bytes' (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU) - reports which translate technical scientific reports into a farmer friendly format, including articles on climate change The WAG engage with external organisations to discuss Welsh research priorities and actively influence programme direction. Programmes include the Agriculture & Climate Change R&D Programme The WAG are engaged with the Land Use Climate Change Group to find ways to reduce greenhouse gas emissions, this includes scenarios for the red meat sector The WAG through Farming Connect provided tailored one to one business and technical guidance and practical and regulatory training from private sector organisations on a variety of topics (including environmental protection and enhancement, environmental management and land management, energy conservation and generation and climate change) via the Whole Farm Plan, the Farm Advisory Services and the Skills Development Programme
		Seek to reduce methane and nitrous oxide emissions from grass fed livestock		Defra are funding an R&D project - ruminant nutrition regimes to reduce methane & nitrogen emission – which aims to assist farmers to manage their livestock in a profitable way as well as lessening their impact on the environment. Results will be disseminated in July 2010

	Objective	Action	Progress	Achievements 2009/2010
5. New entrants	To encourage new personnel into the Welsh red meat industry and support existing personnel	Support further education opportunities in agriculture and key red meat areas (i.e. meat science)		4 PhD's and MSc's commissioned by HCC (including topics such as climate change mitigation, novel grass varieties and inventory calculations for measuring greenhouse gas emissions) and 13 studentships maintained by HCC (including topics such as parasitology, meat science and livestock genetics) Opened in 2009, the Food Industry Centre at UWIC contains food processing facilities and state of the art research facilities. There are a number of bursaries on offer for those studying Food Science (in the form of work-based placements or cash payments) Improve developed a Sector Skills Agreement and Action Plan for the food and drink industry in Wales. This has been used to help fund the 'Food Industry Skills Project' being led by University of Wales Institute, Cardiff (UWIC) which is delivering a food science masters degree programme, 6 short courses, a bursary scheme and an academy feasibility study
		Promote the Welsh red meat industry as a career opportunity and support young farmer and new entrant's initiatives/ events		Delivery of Farming Connect Red Meat Development Programme by HCC - approximately 500 young farmers (aged under 40) took part in open days, discussion group meetings and events Young farmers/ new entrants encouraged through a range of HCC activities - including study tours and carcass selection courses Lantra offer a range of support activities including the £2 million Green Talent Scheme (which offers 5,000 work placements for 14 to 19 year olds), advice on how to get to know the environmental and land-based industries, 'a day in the life of' experiences for 10 different jobs, work experience and volunteering opportunities, guidance on the educational routes into the sector, skills competitions and a Diploma in Environmental and Land-based Studies Improve offer a range of support activities including career information, advice on apprenticeships, guidance on qualifications, a job toolbox service and advice on employability skills The WAG through the Farming Connect Skills Development Programme (delivered by Lantra) provided practical and regulatory training to assist in improving working practices, complying with legislation and encouraging diversification on a variety of topics, to raise awareness of career opportunities in the Welsh red meat industry
	Ensure all employees of the red meat processing sector are treated in accordance with the Department for Health's Single Equality Scheme (2007-2010)			A 12-month inquiry by the Equality and Human Rights Commission into recruitment and employment in the meat and poultry processing sector in England and Wales has made recommendations to supermarkets, recruitment agencies, processing firms, Government, regulators and unions for improving working conditions and standards of both domestic and foreign workers

	Objective	Action	Progress	Achievements 2009/2010
6. Supply chain integration	To improve linkages within the entire Welsh red meat supply-chain and develop a coordinated approach (for economic and environmental purposes)	Seek to enhance the linkages between Welsh tourism and red meat production		Food Tourism Strategic Action Plan launched by the WAG - ongoing monitoring and annual report of success
		Pilot a project to enhance supply-chain transparency		Pilot project initiated to encourage supply chain cooperation - 8,000 copies of quarterly information bulletin sent out by HCC to producers through abattoirs in Wales (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU)
		Seek to have a Retailer Ombudsman appointed to regulate supermarkets		The WAG have pressed in UK government forums for a Retailer Ombudsman resulting in agreement that there should be an independent body with the necessary powers to enforce the new Groceries Supply Code of Practice - work is ongoing to ensure market conditions enable fair and free competition
		Support development of multiple retailer and co-operative networks to strengthen branding, market share and market intelligence and to provide training opportunities		The WAG support projects within the Rural Development Plan for Wales 2007-2013 that seek to develop economic and environmental resources and enhance supply-chain integration. 28 projects have been approved, totaling over £25 million of grants. Projects include a focus on enhancing supply chains, training, management, marketing, information dissemination and transfer of new technologies

	Objective	Action	Progress	Achievements 2009/2010
7. Product development	To encourage the development of added value Welsh red meat products	Support and develop new Welsh branded products		2 product evaluation events undertaken by HCC (Llandudno and Swansea) HCC maintain a portfolio of R&D projects including projects looking to demonstrate safe shelf life of fresh meat HCC maintain an ongoing dialogue with Welsh processors and exporters to encourage development of new/ alternative market sectors and products The Food Technology Centre (Llangefni), the Food Centre Wales (Horeb) and the Food Industry Centre (Cardiff) have supported producers and retailers in fostering the development of the Welsh food processing industry through consultancy, training and research
		Undertake an evaluation of market opportunities for red meat in the 'ethnic' market		Market opportunities for skin-on sheepmeat report published collaboratively by HCC and the FSA Wales
		Encourage the development of innovative ways of utilising the fifth quarter, hides and skins and offal products to encourage utilisation of the entire		Fifth quarter research project underway by HCC which is scheduled to be published in 2010/2011 Fifth quarter opportunities benchmarked by HCC for 2 potential markets - product requirements for China and Spain identified
		Encourage further processing and packing facilities within Wales		The WAG provides financial assistance within the Rural Development Plan for Wales 2007-2013 for capital and revenue investments that add value to agricultural and forestry products through Processing and Marketing Grants - 13 red meat business have been awarded assistance
		Investigate the market opportunities for dairy-bred bull calves		Report on the market opportunities for dairy-bred bull calves published by HCC
		To encourage the uptake of technology within the Welsh red meat industry	Encourage the industry to utilise experiences from around the world, in regard to red meat production	
	Support the uptake of automated carcass grading systems (such as Video Image Analysis [VIA]) in Welsh abattoirs			HCC developed a project proposal to support the development and uptake of VIA in Welsh abattoirs - submitted to the WAG in July 2009

Objective		Action	Progress	Achievements 2009/2010
8. Information and advice dissemination	To ensure the Welsh red meat industry has access to up to date and relevant information and advice to ensure informed decision making	Collate, analyse and disseminate relevant information and advice responsibly to the industry using relevant media and existing networks		The WAG, FSA Wales, EA, HCC, trade organisations and farmers unions all collate data on an ongoing basis in order to disseminate appropriate data through press articles, publications, presentations, meetings, events, open days, DVD's, text messages and through their websites
				Guidance notes for compliance with legislation is published by the WAG on an ongoing basis (including EID and Food Chain Information)
				The WAG published a monthly publication (Gwlad) to disseminate information and advice to over 30,000 individuals in the Welsh agricultural industry - including a number of articles on red meat issues
				HCC targeted relevant trade, consumer and general media, through press releases, specialist articles and on-site visits by farming and other trade journalists - 123 press releases and 26 specialist articles issued by HCC. 5 on-site visits by farming and other trade journalists and 10 press events undertaken by HCC
				Dissemination of information and advice by HCC through literature, the HCC websites and attendance at events and shows (partly funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU). 12 Market Bulletins and 1 special Bulletin published by HCC . In excess of 200 publications currently available from HCC. 2 DVD's released. 'Industry facing' and 'consumer facing' internet sites maintained and expanded by HCC. Approximately 100,000 liveweight price text messages issued by HCC (for beef and sheep)
				Deliver a network of demonstration farms, development farms and discussion groups and disseminate best practice responsibly to the industry
	Support a range of business improvement activities focused on reducing waste, adding value, reducing energy and water usage; and including benchmarking to encourage informed decision making and genetic improvement			10 meetings and events focused on genetic improvement in beef and sheep delivered by HCC. 373 beef and sheep farmers received support from HCC for performance recording, Artificial Insemination (AI) or Embryo Transfer (ET) and 116 received funding for performance recording, AI or ET from HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU)
				HCC's unit cost of production project benchmarked physical and financial data from 29 beef and sheep farms and disseminated the results to the industry. Lamb cost of production and suckler calf cost of production data published by HCC. Hill, upland and lowland lamb cost of production data also published by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU)
				The WAG through Farming Connect provided tailored one to one business and technical guidance and environmental advice from private sector organisations on a variety of topics (including feeding and breeding for improved performance, reducing feed costs by growing more grass or supplementary crops, making better use of fertiliser and farm manures, improving animal health, financial planning to forecast cashflow and profit, environmental protection and enhancement, succession planning, environmental management and land management, farm diversification, energy conservation and generation and climate change) via the Whole Farm Plan and the Farm Advisory Services
To inform consumers of the benefits of Welsh red meat in the diet, counter threats to consumption, highlight the essential role that livestock production plays in maintaining Wales' landscape and biodiversity and highlight Welsh red meat production standards	Deliver a range of educational and health programmes on the importance of Welsh red meat in the diet and raise consumer understanding of how meat is produced (e.g. school road shows, farm visits, cooking demonstrations, etc.)		Farming and Countryside Education (FACE) provided a range of educational programmes to raise understanding amongst children of how food is produced - through their website, publications, open days, school farmer markets and DVD's - focused on healthy eating and sustainability, the food chain, local food, school meals, farming methods, food miles and global agriculture	
			8 major national and international events and shows attended by HCC, including the Royal Welsh Show and Winter Fair	
			6 events for primary school pupils and 4 events for secondary school pupils undertaken by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU)	
			66 secondary schools responded to an HCC questionnaire to ensure future events/ literature/ support is targeted on the areas demanded	
			1 booklet (cool-to-cook) published by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU) which is aimed primarily at children, to advise on healthy diets, advise on the nutritional benefits of red meat and tackle obesity	
			HCC published 5 'Animal Bytes' (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU) - reports which translate technical scientific reports into a farmer friendly format, including articles on animal health and welfare, environmental issues, food health and security and climate change	
Tastings and cooking demonstrations provided at events worldwide (including the Tesco trailer tour across Wales, the URDD [Welsh language youth organisation] and the True Taste Market in London)				

Objective		Action	Progress	Achievements 2009/2010
9. Regulatory development	To advise, assist and influence policy makers and regulatory development with regard to the Welsh red meat industry and support the Welsh red meat industry in complying with and adapting to legislation and requirements (whilst ensuring longer-term economic and environmental sustainability)	Keep up to date with global/ EU/ UK/ Welsh policy and strategic developments, including developments in diet and nutrition; developments in new products, techniques and technologies; and environmental requirements		The WAG, FSA Wales, EA, HCC, trade organisations and farmers unions keep up to date with policy and strategic developments on an ongoing basis through attendance at research and market intelligence/ insight meetings, by receiving weekly/ monthly/ quarterly/ annual subscriptions and liaising with contacts worldwide The WAG through Farming Connect provided tailored one to one business and technical guidance and environmental advice from private sector organisations on a variety of topics (including assisting farmers to meet cross-compliance requirements) via the Farm Advisory Services
		Improve nutritional standards of food and drink provided in schools in Wales		10 events for school pupils undertaken by HCC to encourage inclusion of a balanced diet and better nutrition amongst children (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the WAG and the EU) A 2 year action research project by the WAG, involving 4 local authorities, commenced in September 2008 to develop and test the guidelines for implementing the food and nutritional standards proposed in Appetite for Life and learn lessons from this project to inform wider application across all maintained schools in Wales. These draft guidelines include standards for meat and meat products. The aim of this standard is to improve the quality of meat and poultry products used in schools, cut down on the number of times that manufactured meat products are served, reduce the fat content of children's diets and encourage children to embrace greater diversity in their diets and explore new taste experiences in and out of school
		Influence global/ EU/ UK/ Welsh policies and strategies to ensure commercial performance is not adversely affected		HCC responded to 41 relevant Government and industry consultations, aimed at influencing policies and strategies affecting the Welsh red meat industry Frequent meetings held by HCC and sponsorship of 5 events undertaken by HCC to raise awareness of Welsh red meat to politicians and policy makers in Cardiff Bay, London and Brussels
		Interact with the Welsh Assembly Government Task Force and the Red Tape Review		The Welsh red meat industry is interacting with the Red Tape Review on an ongoing basis
		Ensure interaction with policy makers to ensure Welsh interests are protected		The WAG, FSA Wales and HCC maintained a dialogue with key Government Ministers through regular meetings
		Investigate the links between cross compliance and farm assurance to ensure there is no duplication or additional burden		The Red Tape Review is looking at ways to avoid potential duplication across the Welsh agricultural industry and work is ongoing to investigate links between cross compliance and farm assurance with the aim of avoiding additional burden

Objective		Action	Progress	Achievements 2009/2010
10. Contingency planning	To support the improvement of business efficiency of Welsh red meat industry	Undertake contingency planning to assist the industry during times of difficulty (to include animal health and market impact)		The Animal Health Act 2002 requires that contingency plans are produced which cover certain specified notifiable diseases including Foot and Mouth Disease, Newcastle Disease and Avian Influenza. The WAG Framework Response Plan and Overview of Emergency Preparedness for Exotic Animal Disease set out the structures and processes for dealing with exotic animal disease in Wales. The plans are fully consistent with, and tie into the GB plans produced by Defra and are reviewed annually The WAG have undertaken work to identify and assess vulnerabilities facing the Welsh food supply chain should operational, financial, external or market disruptions be experienced Market impact contingency plan prepared by HCC