

# **Strategic Action Plan for the Welsh Red Meat Industry**



**2010-2011**

**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 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 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, which includes representatives of the Welsh Government, HCC Board members and representatives of the Welsh red meat industry, is responsible for the monitoring and evaluation of the Action Plan. Current Committee members are listed in Annex 1.

The 2009/2010 Annual Monitoring Report of the Action Plan was published in July 2010 and concluded that targets within the Action Plan had either been completed or were progressing well during 2009/2010.

The 2010/2011 Annual Monitoring Report is the second output of the Monitoring Sub Committee.

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 in mid April 2010, which summarised the planned delivery by HCC between 2010 and 2013. Internal business plans within the Welsh Government also identify specific targets against actions where the Welsh Government 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**.
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 (2010-2011)

The following tables highlight some of the achievements against actions for 2010-2011, 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 Government, HCC and industry stakeholders.

Actions	Achievements
1. Promotion	<p>Recognition of Welsh Lamb brand within Wales increased to 51 percent</p> <p>Recognition of the Protected Geographical Indication (PGI) logo within GB increased to 13 percent</p> <p>Awareness of 'Wales the True Taste' brand amongst Welsh consumers and consumers in the rest of the UK at 17% and 2% respectively</p> <p>HCC established a presence of Welsh Lamb in 40 London restaurants (London Welsh Lamb Club)</p> <p>3 point of sale materials disseminated by HCC to GB retailers for Welsh Lamb, Welsh Beef and pork</p> <p>3 export markets attended by Welsh exporters alongside the Welsh Government and/ or HCC - Food &amp; Hotel Asia in Singapore, SIAL in France and Gulfood in Dubai</p> <p>Market research for HCC reported that 84 percent and 87 percent of Welsh consumers considered Welsh Lamb and Welsh Beef respectively to be 'brands they could trust'. 78 percent and 80 percent respectively also reported that they were 'brands for them'</p>

Actions	Achievements
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>2. Research activity and training</b></p>	<p>Portfolio of 9 Research and Development projects maintained by HCC, focused on supporting the Welsh red meat industry</p> <p>The Welsh Government engage with external organisations to discuss Welsh research priorities and actively influence programme direction and encourage collaboration</p> <p>Consumer research for HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU) 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>42 beef and lamb producer selection for slaughter courses delivered by HCC at abattoirs and livestock markets (funded through the Rural Development Plan for Wales 2007-2013)</p> <p>33 projects supported by HCC (funded through the Rural Development Plan for Wales 2007-2013) to disseminate information to the industry on genetic improvement, climate change/ environmental issues, animal health and welfare, animal and human nutrition, product quality and safety, traceability and socio-economics</p> <p>The Welsh 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>Quality Management Procedures training undertaken by HCC in 20 small and medium sized abattoirs and processors across Wales (funded through the Rural Development Plan for Wales 2007-2013)</p>

Actions	Achievements
<p><b>3. Animal health and welfare</b></p>	<p>The Welsh Government and the Animal Health &amp; Welfare Steering Group developed a revised approach to how the GB Animal Health and Welfare Strategy (AHWS) should be delivered in Wales. The Steering Group also re-assessed its top non-statutory disease priorities for the beef, dairy and sheep sectors</p> <p>HCC published 5 booklets/ factsheets/ leaflets focused on animal health and welfare for sheep and beef farmers, including topics such as Johne's disease eradication, BVD eradication, ecto/ endo parasite control and disease surveillance (funded through the Rural Development Plan for Wales 2007-2013)</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) - 176 farmers expressed an interest (to test 8,586 cattle)</p> <p>HCC offered support for BVD testing on beef cattle in Wales (funded through the Rural Development Plan for Wales 2007-2013) - 104 farmers expressed an interest</p> <p>Defra undertake regular surveillance for diseases across GB and disseminate the findings to the Welsh Government and stakeholders</p> <p>HCC reviewed the Parasitology Action Plan for Wales and an updated Action Plan is scheduled to be published in 2011 (funded through the Rural Development Plan for Wales 2007-2013)</p>

Actions	Achievements
<p><b>4. Environmental protection</b></p>	<p>The Environmental Roadmap for beef and sheep production, prepared by HCC, is scheduled to be published in 2011</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</p> <p>The results of the Welsh Government and HCC funded research into bioreduction of fallen stock at Bangor University is being analysed prior to application to the European Food Safety Authority (EFSA) for approval of on-farm storage under the new European Regulation EC/1069/2009</p> <p>Defra are funding a Research and Development project to improve the inventory calculations for greenhouse gas emissions in the UK. Improvements to this data will ensure more reliable data on greenhouse gas emissions is reported allowing progress to monitored more accurately</p>

Actions	Achievements
<p><b>5. New entrants</b></p>	<p>14 PhD's and 2 MSc's commissioned by HCC</p> <p>423 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 Government through the Farming Connect Skills Development Programme 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</p> <p>Following the report by the Equality and Human Rights Commission, into recruitment and employment in the meat and poultry processing sector in England and Wales, in March 2010, a task force (which includes the Welsh Government) has been set up to assess the findings and look at improving working practices</p>

Actions	Achievements
<p><b>6. Supply chain integration</b></p>	<p>The Welsh Government continues to engage with UK government to press for the introduction of a fully independent body with the necessary powers to enforce the new Groceries Supply Code of Practice and to hear appeals. This will ensure greater fairness throughout the supply chain</p> <p>The Welsh Government 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</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>The Food Knowledge Transfer programme (KITE project), delivered by UWIC, aims to support 125 companies in Wales with a further 100 companies receiving disseminated results through workshops and conferences. Through employing graduate/ suitably qualified food technologists, it is estimated that 70 food technology type roles will be developed in Wales during the lifetime of the programme, impacting on sales of Welsh produced product, job creation and waste reduction (funded through the Rural Development Plan for Wales 2007-2013)</p> <p>The Welsh Government 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 - 17 red meat business have been awarded assistance totalling over £1 million</p> <p>HCC awarded 2 scholarships (to South America and Australia/ New Zealand) for 2 Welsh red meat producers to study low input systems and meat grading systems respectively (funded through the Rural Development Plan for Wales 2007-2013)</p> <p>HCC coordinated 23 study tours (to France, Ireland, Scotland, England, Germany, Belgium and Italy) for Welsh red meat producers (funded through the Rural Development Plan for Wales 2007-2013)</p>

Actions	Achievements
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>8. Information and advice dissemination</b></p>	<p>The Welsh 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 96 press releases, 26 specialist articles and 8 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) - monthly Market Bulletins, in excess of 300 publications available, 'industry facing' and 'consumer facing' internet sites and approximately 1,000 liveweight price text messages issued on a weekly basis (for beef and sheep)</p> <p>A network of demonstration farms, development farms and discussion groups maintained by HCC (as part of the Welsh Government Farming Connect Red Meat Development Programme) - 19 demonstration farm events, 8 development farm events, 74 discussion group meetings, 7 technical factsheets and 11 Gwlad articles</p> <p>10 meetings and events focused on genetic improvement in beef and sheep delivered by HCC. 394 beef and sheep farmers received training on genetic improvement and support 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)</p> <p>20 national and international events and shows attended by HCC to target consumers</p> <p>9 events for school pupils undertaken by HCC (funded through the Rural Development Plan for Wales 2007-2013)</p> <p>8 publications giving healthy diet advice to children and providing nutritional information for decision makers in the education and health services published by HCC (funded through the Rural Development Plan for Wales 2007-2013)</p>

Actions	Achievements
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>9. Regulatory development</b></p>	<p>Following a 2-year research project by the Welsh Government, involving 4 local authorities, which concluded in December 2010, the draft guidelines on standards for meat and meat products has been revised</p> <p>HCC responded to 26 relevant government and industry consultations, aimed at influencing policies and strategies affecting the Welsh red meat industry</p> <p>The Welsh red meat industry is interacting with the Red Tape Review on an ongoing basis</p>

Actions	Achievements
10. Contingency planning	<p>A GB and Northern Ireland Contingency Plan is being produced by Animal Health on behalf of Defra and in association with Devolved Administrations in Wales, Scotland and Northern Ireland. A revised Welsh Government Plan is being produced that will sit beneath the GB and Northern Ireland Plan and will set out the systems and structures that would be used to deal with an outbreak of exotic notifiable disease in Wales</p> <p>HCC demand driver recovery plan updated on an ongoing basis</p>

## FOCUS FOR DELIVERY OF THE ACTION PLAN IN 2011-2012

In order to monitor progress of delivery against Actions in 2010-2011, the Monitoring Sub Committee agreed to split the Actions into the following four categories for delivery.

### 1. Actions which have been fully completed

As some of the Actions were fully achieved in 2009-2010, there was no requirement for activities to be delivered in 2010-2011. The tables in Annex 3 show the Actions which have been fully completed in 2009/2010 and 2010/2011.

### 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 2011-2012. These are colour coded in the tables in Annex 2.

### 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 2011-2012. These are colour coded in the tables in Annex 2.

The Actions are as follows:

- 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.
- Seek to enhance the linkages between Welsh tourism and red meat production.
- Encourage the development of innovative ways of utilising the fifth quarter, hides and skins and offal products to encourage utilisation of the entire carcass.

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

In some instances Actions have not been fully achieved in 2010/2011 as delivery is still underway. These are colour coded in the tables in Annex 2. The Actions are as follows:

- Develop PGI status for Welsh Pork  
Due to the lengthy process in applying for Protected Food Name status - which involves Welsh, UK and EU consultation - PGI status for Welsh Pork is a long term target.
- Develop an environmental impact 'roadmap' for Welsh red meat production  
The roadmap has been drafted and consulted upon during 2010/2011 and is scheduled to be published later in 2011/2012.
- Support the uptake of automated carcass grading systems in Welsh abattoirs  
A project proposal to support the development and uptake of Video Image Analysis in Welsh abattoirs was prepared by HCC and submitted to the Welsh Government in 2009/2010. Possible funding is being investigated in 2011/2012.
- Investigate the links between cross compliance and farm assurance to ensure there is no duplication or additional burden  
The Red Tape Review is underway, looking at ways to avoid potential duplication across the Welsh agricultural industry, however this is a long term target.

## **Annex 1**

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

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#### **HCC Board Members**

Dai Davies (*Monitoring Sub Committee Chair*)

Huw Evans

Glyn Roberts

Wyn Williams

#### **Industry Representatives**

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

NFU Cymru Livestock Board Chair - Peter Davies

#### **Welsh Government Officials**

Food, Fisheries and Market Development Division - Paula Whitfield

Sustainability and Environmental Evidence Division - Barbara McLean

#### **HCC Executives**

Bryan Regan




Kirsten Smith

## **Annex 2**

### **Achievements against Actions (2010-2011)**

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In the following tables achievements against actions (April 2010 to March 2011) are colour coded to show the progress of delivery.

-  Signifies that Actions have been achieved but that ongoing delivery is required
-  Signifies that Actions have been achieved but that increased emphasis is required
-  Signifies that delivery is underway but that Actions have not been fully achieved

Objective	Action	Progress		Achievements 2010/2011
		2009/2010	2010/2011	
1. Promotion	To advertise and promote Welsh red meat and promote the industry overall			Recognition of Welsh Lamb brand within Wales increased to 51% (from 47%). Recognition of Welsh Beef brand within Wales was 25% which was higher than all other beef brands - <i>Market Tools for Hybu Cig Cymru - Meat Promotion Wales (HCC)</i>
				53% and 34% of Welsh consumers spontaneously mentioned Welsh Lamb and Welsh Beef respectively when asked about Welsh food and drink and 23% and 3% 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 Welsh Government</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 55% - <i>Beaufort Research for the Welsh Government</i>
				13% of GB consumers said they recognised the PGI logo in 2010 (compared to 6% in 2007) - <i>Beaufort Research for HCC</i>
				Awareness of 'Wales the True Taste' brand amongst Welsh consumers and consumers in the rest of the UK at 17% and 2% respectively from 16% and 2% respectively in 2009) - <i>Beaufort Research for the Welsh Government</i>
				The True Taste Awards in November 2010 (organised by the Welsh Government) received 700 entries in 15 categories
				The True Taste Awards winner in the red meat category in the 2009/2010 awards promoted by the Welsh Government through a PR agency throughout the UK, through distribution of the Producer Directory and the True Taste magazine (50,000 copies distributed across Wales)
				Sponsorship of: Junior Chef of Wales competition Battle for the Dragon (where teams from Switzerland, Finland and Wales competed) Welsh International Culinary Championships Welsh Culinary Team at the World Culinary Olympics (held in Luxembourg)
				Sponsorship by HCC of 19 industry related events (including county shows, Farmers' Union Wales conference, NFU Cymru conference and National Sheep Association 2010 event) The Welsh Government attended 12 exhibitions and events
				3 business development programmes (via Levercliff and Menter a Busnes) initiated by the Welsh Government
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 food service operators using where necessary sales promotion programmes to achieve enhanced on-pack and menu identification
				HCC established a presence of Welsh Lamb in London restaurants by means of a London Welsh Lamb Club - 40 registered restaurants
				Approximately 2 million Welsh Lamb and Welsh Beef labels distributed by HCC to retailers
Open up new markets for Welsh red meat (at home and in export), where appropriate, for prime red meat, veal, mutton, etc.				3 executions of Welsh Lamb and Welsh Beef point of sale materials disseminated by HCC to GB retailers (Spring/ Summer 2010, Autumn/ Winter 2010 and Spring/ Summer 2011), 1 execution of pork point of sale materials disseminated by HCC to retailers
				3 export markets attended by Welsh exporters alongside the Welsh Government and/ or HCC - Food & Hotel Asia in Singapore, SIAL in France and Gulfood in Dubai. 5 export events undertaken by HCC in Italy, Germany and France
				3 exploratory market visits undertaken by the Welsh Government and/ or HCC - to Finland, Denmark and China. 7 inward trade missions undertaken by HCC, to Germany, Spain, Luxembourg and Switzerland
				The Welsh Government facilitated 2 UK export events - China Workshop and China Buyer meeting
				Market access discussions undertaken with Defra by the Welsh Government and HCC for Canada, China and Russia export markets. Market Research and Buyers Projects undertaken by the Welsh Government for China and Canada
				Welsh Lamb is available as a branded item in major retailers in France, Italy, Germany, Belgium, Luxembourg, Spain, Singapore, Dubai and Hong Kong HCC membership of UK Export Certification Partnership (UKECP) which seeks to open up markets for UK exports

Objective		Action	Progress		Achievements 2010/2011	
			2009/2010	2010/2011		
1. Promotion (continued)	To advertise and promote Welsh red meat and promote the industry overall (continued)	Encourage procurement of Welsh red meat by Local Authorities, colleges, the army, hospitals, event and show organisers, other public sectors, etc.			Three Catering Advisory Group meetings (CAG) were attended during the year, to update NHS Boards catering managers on aspects of the supply side of their meat, justifying price increases particularly in relation to lamb supply. Advising on alternative cut use and updating Welsh Health Supplies meat purchasing specifications including writing new meat product specifications	
					Meeting attended at Swansea City Council and consequently their contracted supplier to help facilitate the supply of Welsh Meat to Swansea schools	
					The Welsh Government 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 Welsh Government 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 Welsh Government - ongoing monitoring and annual report of success	
	Promote the value of the Welsh red meat industry and products, livestock breeds, livestock genetics and live exports					84% and 87% of Welsh consumers reported that Welsh Lamb and Welsh Beef respectively were 'brands they could trust'. 78% and 80% percent of Welsh consumers also reported that Welsh Lamb and Welsh Beef respectively were 'brands for them' - <i>Market Tools for HCC</i>
						HCC promoted Welsh red meat brands by means of integrated advertising (TV, print media and digital), PR, on-pack sales promotions and marketing literature, such as recipe leaflets, at the point of sale. Welsh Lamb TV advertising in the Wales TV region was undertaken by HCC during September 2010. Welsh Beef TV advertising in the Wales TV region undertaken by HCC in December 2010
						The Welsh Government 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
						HCC supported the launch of 3 Welsh Pork product ranges and a Sausage competition, and created a vast range of high quality fresh pork, bacon and gammon photography for use by the industry
						PGI specification for Welsh Pork under development by HCC
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 – 33 annual inspections and 12 unannounced inspections undertaken
						Enforcement authorities provided with ongoing support by HCC in regard to Welsh Lamb and Welsh Beef
						Amendments proposed by HCC to the PGI Welsh Lamb and Welsh Beef specifications approved by the EC, enhancing enforcement
					Enforcement authorities undertook regular inspections of Welsh Lamb and Welsh Beef in the retail sector - enforcement action undertaken when appropriate	

Objective		Action	Progress		Achievements 2010/2011
			2009/2010	2010/2011	
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 9 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 Welsh Government, HCC and industry representatives). Projects include research into new forage varieties to address future climate change issues and research into controlling liver fluke on Welsh beef and sheep farms
					As Defra manage all research budgets on an England and Wales basis, Welsh Government officials work closely with Defra counterparts to actively influence both programme and project development to ensure Welsh research needs are considered. R&D programmes of relevance to the Welsh red meat sector include Sustainable Farming Systems, Agriculture and Climate Change, Resource Efficient and Resilient Food Chain and Animal Health and Welfare
					The Welsh Government engage with external organisations to discuss Welsh research priorities, actively influence programme direction and encourage collaboration, these include levy boards, research institutes throughout the UK, other devolved administrations, research councils and Living with Environmental Change (LWEC)
					The Welsh Government is continuing to strengthen links 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. Such engagement has included the development of a consortium building workshop in south Wales prior to the launch of a £15 million R&D competition focusing on sustainable protein production
					The research and survey work funded by the Food Standards Agency (FSA) is focused on helping the Agency understand food issues and meet its policy aims and objectives. The Agency 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. In relation to the red meat sector specifically, the Agency has previously commissioned work, for example, around skin-on-sheepmeat and currently, the FSA is building the evidence base to support a case to modernise official controls on meat. The driving force behind this work is to improve public health by adopting a more risk- and evidence-based approach to meat production. Research has been carried out in the areas of inspection data, assessment of current inspection tasks, and analysis of risks to public health, animal health and welfare. Future evidence gathering exercises will include revision of Food Chain Information and Collection and Communication of Results, running trials of alternative models of inspection, and further risk assessments
					Market research commissioned by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the European Union (EU)) - Lamb accounts for 14% of UK red meat volume sales in 2010. 49% of retail lamb sales in 2010 were to social classes AB and C1 (the same percentage as 2009). 62% of lamb sold in the UK in 2010 were chop/ steaks and leg roasts (compared to 50% in 2009). 53% of volume sales of lamb in 2010 were in London, the Midlands and the South - Kantar Worldpanel for HCC
					Consumer research commissioned by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government 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%) - Beaufort Research for HCC

Objective		Action	Progress		Achievements 2010/2011
			2009/2010	2010/2011	
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			42 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 Government and the EU). Selection for slaughter competitions undertaken by HCC at 9 events (including the Royal Welsh Show and Winter Fair)
					33 projects focusing on development and innovation were supported by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU) to disseminate 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 Welsh 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 (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 UK's Sector Skills Council for land-based and environmental industries) look after the skills needs in relation to land management and production, animal health and welfare, and environmental industries
					The Welsh Government through the Farming Connect Skills Development Programme provides 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 - 2,195 individuals attended events
					Quality Management Procedures training undertaken by HCC in 20 small and medium sized abattoirs and processors across Wales (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU)
					Improve (the Food and Drink Sector Skills Council) has delivered a new suite of 'Improve Proficiency Qualifications' (IPQ's) and 'Improve Vocational Qualifications' (IVQ's) for the food industry. This includes qualifications for meat & poultry and a new 'Food Manufacturing Excellence' (FME) qualification. These are currently being publicised to both employers and providers in Wales. These have been well received to date and it is hoped the FME qualification may be run as a 'pilot' via the Food Supply Chain (SPFP) Project
					A project manager has now been appointed for the 'Food Supply Chain Project' and Miller Research (working collaboratively with Beaufort Research) has been appointed to complete the research phase. It is anticipated that Improve's new 'Food Manufacturing Excellence' (FME) qualification will be piloted through this project
					The Welsh Government collects post-16 education and training data via the Lifelong Learning Wales Record (LLWR). There were 7 Foundation Modern Apprenticeship (level 2) programmes in the Meat and Poultry processing sector pursued between August 2009 and July 2010

Objective		Action	Progress		Achievements 2010/2011		
			2009/2010	2010/2011			
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			<p>The Welsh Government and the Animal Health &amp; Welfare Steering Group have developed a revised approach to how the GB Animal Health and Welfare Strategy (AHWS) is delivered in Wales and how the work of the Group is prioritised. During the last six months the AHWS Steering Group has been re-assessing their top non-statutory disease priorities for the beef, dairy and sheep sectors. At their meeting in February 2011 the AHWS Steering Group agreed their top priorities would be:</p> <ul style="list-style-type: none"> <li>- Beef: Bovine Viral Disease (BVD), Johne's Disease and Liver Fluke;</li> <li>- Dairy: Johne's Disease, Lameness, Mastitis and BVD; and</li> <li>- Sheep: Sheep Scab, Liver Fluke, Lameness and Lambing Losses.</li> </ul> <p>These priorities will help focus the work of the AHWS Steering Group both in short and longer term. The Welsh Government retains a statutory responsibility for certain animal diseases as well as the responsibility to lead on a notifiable exotic animal disease outbreak. However, whether addressing a notifiable or non-notifiable animal disease, the AHWS Steering Group supports the continued need for close partnership working between industry and government</p> <p>Through the Farming Connect Red Meat Development Programme, HCC prepare animal health plans on demonstration farms in conjunction with the farm veterinary. 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</p> <p>The Welsh Government engage with external organisations to discuss Welsh research priorities</p> <p>The Welsh Government TB Eradication Programme has resulted in the number of cattle being compulsory slaughtered because of bovine TB in Wales decreasing to 6,587 cattle (January to October 2010) from 9,146 slaughtered during the same period in 2009. In the first 10 months of 2010, the Welsh Government arranged the testing of 1,562,650 cattle compared with 1,518,338 during the same period in 2009. Approximately 12% of cattle herds had been under restriction at some point during the period due to a TB incident which is 2% lower than for the same period in 2009. The reduction in new incidents in 2010 is 14% compared to 2009</p> <p>HCC published 5 booklets/ factsheets/ leaflets focused on animal health and welfare for sheep and beef farmers, including topics such as Johne's disease eradication, BVD eradication, ecto/ endo parasite control and disease surveillance (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU). Through the Farming Connect Red Meat Development Programme, HCC held 7 demonstration farm events including animal health and welfare topics</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 Government and the EU) - 176 farmers expressed an interest to date (to test 8,586 cattle). 60 farmers have received support</p> <p>HCC offered support for BVD testing on beef cattle in Wales (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU) - 104 farmers expressed an interest to date</p> <p>HCC published 10 'Animal Bytes' (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU) which are reports which translate technical scientific reports into a farmer friendly format - including articles on animal health and welfare</p> <p>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 Welsh Government and the EU) - including an A-Z guide on diseases facing the industry</p> <p>The Welsh Government 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 improving animal health via the Whole Farm Plan, the Farm Advisory Services and the Skills Development Programme</p>		
					<p>Defra undertake regular surveillance for diseases across GB and disseminate the findings to the Devolved Administrations and stakeholders</p> <p>NADIS disease surveillance funded by HCC and disseminated widely to assist the industry</p> <p>HCC reviewed the Parasitology Action Plan for Wales with input from the Parasitology Steering Group and an updated Action Plan is scheduled to be published in 2011 - this 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 Welsh Government and the EU)</p> <p>Programme of disease surveillance and health benchmarking initiated by HCC on 8 Demonstration Farms (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU)</p>		
				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)			

Objective	Action	Progress		Achievements 2010/2011
		2009/2010	2010/2011	
4. Environmental protection	To seek to mitigate the Welsh red meat industry's impact on the environment			The Welsh Government 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			The Environmental Roadmap for beef and sheep production, prepared by HCC, is scheduled to be published in 2011
	Facilitate a coordinated approach to water management, pollution control and waste disposal, between industry and relevant private and public sector bodies			The Welsh Government 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 results of the Welsh Government and HCC funded research into bioreduction of fallen stock at Bangor University is currently being analysed prior to application to the European Food Safety Authority (EFSA) for approval of on-farm storage under the new European Regulation EC/1069/2009
				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 an abattoir of the farmers choice in Wales and through the dissemination of 8,000 bulletins to producers through abattoirs (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government 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 Welsh Government 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 10 'Animal Bytes' (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government 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

Objective	Action	Progress		Achievements 2010/2011	
		2009/2010	2010/2011		
4. Environmental protection (continued)	To seek to mitigate the Welsh red meat industry's impact on the environment (continued)			The Environmental Roadmap for beef and sheep production, prepared HCC, is scheduled to be published in 2011 and suggests how addressing agricultural waste has a positive impact on the environment	
				Research undertaken collaboratively by the Welsh Government and Bangor University - bioreduction project	
				Waste of animal origin (animal by-products) from the food industry will cover all aspects, from the livestock rearing unit, through slaughtering to down stream processing and incorporation into food stuffs. The new European Regulations on this waste have allowed some relaxation for low risk waste and recognises that new technologies are being developed to extract value from the waste rather than landfill/ destroy it. The Welsh Government will attempt to implement the Regulations with the aim of reducing the burden of dealing with this waste and maximising recovery of both energy and resources from it in ways that still safeguard animal and public health. Within the new controls is the possibility to safely store some of the smaller fallen stock on farms via a containment system, the technical aspects of a system being developed in Wales will be included in a dossier to be considered by the European Food Safety Agency (EFSA) shortly. If this is accepted by EFSA , this containment system could be approved for use in the EU. This Welsh development could have significant benefits to some farmers who find current disposal arrangements burdensome	
				Recycling of low risk animal by-products has been undertaken via composting for a few years in certain parts of Wales. It is expected that recycling by digestion in anaerobic digestors (AD plants) will increase where there is an ability to recover energy via methane and produce a soil improver/organic fertiliser as well. Both these recycling systems can operate at varying throughput sizes that could allow the food supply chain to utilise them for waste disposal	
	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 Welsh 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
					The Farming Connect Development Programme aims to help producers prepare for the impact of, and mitigate against, climate change
					The Environmental Roadmap for beef and sheep production, prepared by HCC, is scheduled to be published in 2011 and aims to outline strategies for all sectors of the supply chain to reduce their impact on the environment
					HCC published 10 'Animal Bytes' (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU) - reports which translate technical scientific reports into a farmer friendly format, including articles on climate change
					The Welsh Government engages with external organisations to discuss Welsh research priorities and actively influence programme direction. Programmes include Defra's (in partnership with the UK devolved administrations) Agriculture and Climate Change R&D Programme, of which the Greenhouse Gas Inventory R&D Platform is a major (£12.6m) component. Under the programme consortia of research institutions are delivering specific methane emissions factors for a range of cattle and sheep systems
					The Welsh Government have responded to the independent Land Use Climate Change report (March 2010) and accepted the majority of it's recommendations. An implementation plan has been developed which includes knowledge transfer and R&D activity to reduce greenhouse gas emissions from Wales' ruminant livestock
Seek to reduce methane and nitrous oxide emissions from grass fed livestock				Defra are funding an R&D project to improve the inventory calculations for greenhouse gas emissions in the UK. Improvements to this data will ensure more reliable data on greenhouse gas emissions is reported allowing progress to monitored more accurately	
				The Welsh Government 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	
				The Defra funded R&D project, ruminant nutrition regimes to reduce methane and nitrogen emission, concluded in 2010/2011. Results are being disseminated to the industry to assist farmers in managing their livestock in a profitable way as well as lessening their impact on the environment	

Objective	Action	Progress		Achievements 2010/2011
		2009/2010	2010/2011	
5. New entrants	To encourage new personnel into the Welsh red meat industry and support existing personnel			<p>14 PhD's and 2 MSc's commissioned by HCC (including topics such as climate change mitigation, novel grass varieties and inventory calculations for measuring greenhouse gas emissions)</p> <p>Opened in 2009, the Food Industry Centre at the University of Wales Institute Cardiff (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)</p> <p>Food Industry Skills Project (FISP): The Masters Degree is almost ready for launch in 2011 and has recently been validated by UWIC following receipt of 'letters of support' from various partners and stakeholders. The course has been developed in conjunction with Aberystwyth University, North Carolina University and Michigan State University</p> <p>Foundation Degree: An application submitted by UWIC (supported by Improve) to develop a Foundation Degree in Food Science/ Technology has recently been approved.</p>
	Promote the Welsh red meat industry as a career opportunity and support young farmer and new entrant's initiatives/ events			<p>Delivery of Farming Connect Red Meat Development Programme by HCC - 423 young farmers (aged under 40) took part in open days, discussion group meetings and events</p> <p>The Welsh Government Young Entrants Support Scheme (YESS) provided assistance to facilitate the establishment of young farmers (under 40) who possess adequate skills and competence and are setting-up as head of the holding for the first time. The assistance package included a one off grant payment for capital investment for expenses incurred when young entrant is setting-up as head of holding for the first time; access to a dedicated Young Entrants' Business Enabler Service, which will advise on training, knowledge transfer and joint venture opportunities as well as matching young entrants with appropriate established farmers who wish to explore different working patterns e.g. share farming, joint ventures, etc.; and access to funded mentoring services from established farmers</p> <p>Young farmers/ new entrants encouraged through a range of HCC activities - including study tours and carcass selection courses</p> <p>Lantra offer a range of support activities including advice on how to get to know the environmental and land-based industries, 'a day in the life of' experiences, work experience and volunteering opportunities, guidance on the educational routes into the sector, skills competitions and a Diploma in Environmental and Land-based Studies</p> <p>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</p> <p>The Welsh Government through the Farming Connect Skills Development Programme 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</p>
	Ensure all employees of the red meat processing sector are treated in accordance with the Department for Health's Single Equality Scheme (2007-2010)			<p>A 12-month inquiry by the Equality and Human Rights Commission (EHRC) into recruitment and employment in the meat and poultry processing sector in England and Wales was released in March 2010. It made recommendations to supermarkets, recruitment agencies, processing firms, government, regulators and unions for improving working conditions and standards of both domestic and foreign workers. A task force was set up to assess the inquiries findings and look at improving working practices. The Welsh Government sits on this task force to ensure that any actions specific the Welsh meat and poultry processing sector are taken forward and dealt with accordingly. The EHRC will soon undertake a formal review to assess the extent to which relevant bodies have effectively implemented the recommendations in the inquiry report</p>

Objective	Action	Progress		Achievements 2010/2011
		2009/2010	2010/2011	
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)			<p>Food Tourism Strategic Action Plan launched by the Welsh Government - ongoing monitoring and annual report of success</p> <p>The Welsh Government continues to engage with UK government to press for the introduction of a fully independent body with the necessary powers to enforce the new Groceries Supply Code of Practice and to hear appeals. This will ensure greater fairness throughout the supply chain</p> <p>The Welsh Government 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</p>
	Seek to enhance the linkages between Welsh tourism and red meat production			
	Seek to have a Retailer Ombudsman appointed to regulate supermarkets			

Objective	Action	Progress		Achievements 2010/2011		
		2009/2010	2010/2011			
7. Product development	To encourage the development of added value Welsh red meat products	Support and develop new Welsh branded products			HCC maintain a portfolio of R&D projects including a project looking at plant based strategies to improve the nutritional value of beef for the consumer	
					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	
	Encourage the development of innovative ways of utilising the fifth quarter, hides and skins and offal products to encourage utilisation of the entire carcass	Encourage further processing and packing facilities within Wales				The Food Knowledge Transfer programme (KITE project), delivered by UWIC, aims to support 125 companies in Wales with a further 100 companies receiving disseminated results through workshops and conferences. Through employing graduate/ suitably qualified food technologists, it is estimated that 70 food technology type roles will be developed in Wales during the lifetime of the programme, impacting on sales of Welsh produced product, job creation and waste reduction (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU)
						Ongoing encouragement by HCC for the development of innovative ways of utilising the fifth quarter, hides and skins and offal products. Fifth quarter research project by HCC scheduled to be published in 2011
						The Welsh Government 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 - 17 red meat business have been awarded assistance totalling over £1 million
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				HCC awarded 2 scholarships (to South America and Australia/ New Zealand) for 2 Welsh red meat producers to study low input systems and meat grading systems respectively (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU). The scholar from 2009/2010 attended a number of industry meetings to disseminate the findings of his trip	
					HCC coordinated 23 study tours (to France, Ireland, Scotland, England, Germany, Belgium and Italy) for Welsh red meat producers (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU)	
	Support the uptake of automated carcass grading systems (such as Video Image Analysis [VIA]) in Welsh abattoirs				HCC project proposal to support the development and uptake of VIA in Welsh abattoirs submitted to the Welsh Government in 2009/2010	

Objective	Action	Progress		Achievements 2010/2011			
		2009/2010	2010/2011				
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			The Welsh Government, 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 Welsh Government on an ongoing basis (including electronic identification (EID) and Food Chain Information)			
				The Welsh Government 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 - 96 press releases and 26 specialist articles issued by HCC. 8 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 Welsh Government and the EU). 12 Market Bulletins and 1 special Bulletin published by HCC. In excess of 300 publications currently available from HCC, including the Little Book of Meat Facts 2010. 'Industry facing' and 'consumer facing' internet sites maintained and expanded by HCC. Approximately 1,000 liveweight price text messages issued by HCC on a weekly basis (for beef and sheep)			
				Deliver a network of demonstration farms, development farms and discussion groups and disseminate best practice responsibly to the industry			A network of demonstration farms, development farms and discussion groups maintained by HCC (as part of the Welsh Government Farming Connect Red Meat Development Programme). 19 demonstration farm events and 8 development farm events undertaken by HCC. 74 discussion group meetings organised by HCC. 7 technical factsheets and 11 Gwlad articles published by HCC
				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. 394 beef and sheep farmers received training on genetic improvement and support 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 Welsh Government and the EU)
	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.)			HCC's unit cost of production project benchmarked physical and financial data from 37 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 (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU)		
					The Welsh 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 (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		
					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		
				20 national and international events and shows attended by HCC to target consumers, including the Royal Welsh Show and Winter Fair			
				9 events for school pupils undertaken by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU)			
				90 responses to an HCC questionnaire to ensure future events/ literature/ support is targeted on the areas demanded			
				8 publications giving healthy diet advice to children and providing nutritional information for decision makers in the education and health services (Cool2cook, 4 health leaflets and 3 posters on meat cuts for secondary schools) published by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU)			
				HCC published 10 'Animal Bytes' (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government 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 World of Welsh Lamb at the Leadenhall Market in London, the URDD [Welsh language youth organisation] and the Royal Parks Half Marathon)			

Objective	Action	Progress		Achievements 2010/2011	
		2009/2010	2010/2011		
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			The Welsh Government, 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 Welsh 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 (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			9 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 Welsh Government and the EU) A 2-year action research project commissioned by the Welsh 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. The final report for this project was published in December 2010. Taking into account the lessons learnt from those participating in the project and other local authorities implementing the standards, the section within the draft guidelines on standards for meat and meat products has been revised. 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. Consideration is currently being given as to whether any further changes need to be made to the standard for meat and meat products
		Influence global/ EU/ UK/ Welsh policies and strategies to ensure commercial performance is not adversely affected			HCC responded to 26 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 8 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 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 Welsh Government, FSA Wales and HCC maintained a dialogue with key Government Ministers through regular meetings Frequent meetings held by HCC and sponsorship of 8 events undertaken by HCC to raise awareness of Welsh red meat to politicians and policy makers in Cardiff Bay, London and Brussels
		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 2010/2011	
		2009/2010	2010/2011		
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 Welsh Government 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 A GB and Northern Ireland Contingency Plan is being produced by Animal Health on behalf of Defra and in association with Devolved Administrations in Wales, Scotland and Northern Ireland. A revised Welsh Government Plan is being produced that will sit beneath the GB and Northern Ireland Plan and will set out the systems and structures that would be used to deal with an outbreak of exotic notifiable disease in Wales The Welsh Government have undertaken work to identify and assess vulnerabilities facing the Welsh food supply chain should operational, financial, external or market disruptions be experienced HCC demand driver recovery plan updated on an ongoing basis

## Annex 3

### Actions which have been fully completed

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In the following tables achievements against actions are shown for actions where the activity has been fully achieved.

Objective		Action	Achievements
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)	Pilot a project to enhance supply-chain transparency	Pilot project to enhance supply-chain transparency initiated by Hybu Cig Cymru - Meat Promotion Wales (HCC) in 2009/2010
			HCC continue to work with the entire Welsh red meat supply-chain to improve linkages and develop a coordinated approach

Objective		Action	Achievements
7. Product development	To encourage the development of added value Welsh red meat products	Undertake an evaluation of market opportunities for red meat in the 'ethnic' market	Evaluation of market opportunities for red meat in the 'ethnic' market undertaken by the Food Standards Agency Wales and HCC in 2009/2010
		Investigate the market opportunities for dairy-bred bull calves	Investigation of the market opportunities for dairy-bred bull calves undertaken by HCC in 2009/2010
			HCC continue to encourage the development of added value Welsh red meat products
			HCC continue to encourage the development of added value Welsh red meat products