

Strategic Action Plan for the Welsh Red Meat Industry



2011-2012

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 on 28 April 2009 by Elin Jones AM, the then Minister for Rural Affairs.

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 3.

Evidence of achievements against the actions within the Action Plan is supplied by all parties in the Welsh red meat supply chain - the Welsh Government, HCC and industry stakeholders.

Annual Monitoring Reports of the Action Plan were published in July 2010 and October 2011, summarizing delivery against the targets within the Action Plan. It was reported that targets had either been completed or were progressing well during both 2009-2010 and 2010-2011.

The 2011-2012 Annual Monitoring Report is the third output of the Monitoring Sub Committee and covers the period 01 April 2011 to 31 March 2012.

In order to meet the needs of the industry and to achieve the objectives identified by the Action Plan, HCC issues a 3-year Corporate Plan in April each year, summarizing the planned delivery by HCC for the forthcoming three years. 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. 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).

HIGHLIGHTS OF DELIVERY (2011-2012)

The following tables highlight some of the achievements against actions for 2011-2012, 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	Highlights of Delivery (2011-2012)
<p style="text-align: center;">1. Promotion</p>	<p>Consumer opinion of Welsh Lamb as 'a brand I can trust' increased to 85% in Wales (from 84%) and increased to 82% in Meridian (from 65%)</p> <p>Consumer opinion of Welsh Lamb as 'a brand for me' increased to 87% in Wales (from 78%) and measured at 44% in Meridian (2011/2012 is the base year)</p> <p>The True Taste Awards in November 2011 received 1,017 entries from 366 businesses (up from 700 entries in 2010/2011). 119 awards were given in total, 75 from product categories of which 23 were specifically from the meat sector</p> <p>HCC maintained a presence of Welsh Lamb in 60 UK restaurants (Welsh Lamb Club network)</p> <p>3 point of sale materials disseminated by HCC to GB retailers for Welsh Lamb and Welsh Beef</p> <p>3 export market trade fairs attended by Welsh exporters alongside the Welsh Government and/ or HCC - Food & Hotel Asia in Singapore, Anuga in Germany and Gulfood in Dubai. 5 export events undertaken by HCC in Benelux, France, Germany and Italy</p> <p>HCC promoted Welsh red meat brands by means of integrated advertising (TV, print media and digital), press relations, on-pack sales promotions and marketing literature (including recipe leaflets), at the point of sale</p>

Actions	Highlights of Delivery (2011-2012)
<p style="text-align: center;">2. Research activity and training</p>	<p>Portfolio of 7 Research and Development (R&D) projects maintained by HCC, focused on supporting the Welsh red meat industry</p> <p>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</p> <p>Consumer opinion of lamb research demonstrated that consumer opinion remained fairly similar to findings in 2009 with taste, tenderness, leanness and price being key motivators for purchase</p> <p>37 beef and lamb producer selection for slaughter courses delivered by HCC at abattoirs and livestock markets</p> <p>Preparing animals for slaughter DVD produced and disseminated to over 3,000 producers by HCC, to aid producers in preparing livestock for market</p> <p>7 projects supported by HCC 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 the Farming Connect scheme provides tailored one to one business and technical guidance and environmental advice on a variety of topics via the Whole Farm Plan and Farm Advisory Services. The Knowledge Transfer Programme delivery aims to help producers adopt new practices, benchmark performances, share ideas, address market needs and encourage innovation</p> <p>Quality Management Procedures training maintained by HCC in 21 small and medium sized abattoirs and processors across Wales</p>

Actions	Highlights of Delivery (2011-2012)
<p style="text-align: center;">3. Animal health and welfare</p>	<p>In 2011 the Animal Health & Welfare Strategy Steering Group developed a new approach to the delivery of the GB Animal Health & Welfare Strategy objectives in Wales and how the work of the Steering Group should be prioritised moving forward. This involved a list of top “non Statutory” disease priorities which will be reviewed each year by the Steering Group</p> <p>HCC published 10 booklets/ factsheets/ leaflets focused on animal health and welfare for sheep and beef farmers, including topics such as controlling liverfluke, reducing lamb losses and anthelmintic resistance</p> <p>HCC offered support for Johne's Disease testing on beef cattle in Wales - 67 farmers received support (testing 2,907 cattle), up from 2010/2011 where 60 farmers received support</p> <p>HCC offered support for BVD testing on beef cattle in Wales - 40 farmers received support</p> <p>Defra undertake regular surveillance for diseases across GB and disseminate the findings to the other GB Administrations and stakeholders</p> <p>HCC reviewed the Parasitology Action Plan for Wales with input from the Parasitology Steering Group and an updated Action Plan was published in 2011</p>

Actions	Highlights of Delivery (2011-2012)
<p style="text-align: center;">4. Environmental protection</p>	<p>'A sustainable future – the Welsh Red Meat Roadmap' was published by HCC in July 2011. It identifies strategies that will assist the Welsh red meat industry in responding to environmental change.</p> <p>The final results of the Welsh Government and HCC funded research into bioreduction of fallen stock at Bangor University were received in November 2011. These have been analysed and a report is currently being drafted for submission to the European Food Safety Authority (EFSA) for approval of on farm storage under European Regulation EC 1069/2009</p> <p>The Farming Connect Red Meat Development Programme, delivered by HCC until August 2011, promoted new ideas and initiatives through its network of demonstration farms, discussion groups and knowledge transfer officers. Since September 2011 Farming Connect, delivered by Menter a Busnes, has delivered a knowledge transfer programme, maintained a network of demonstration farms and initiated one-to-one support</p> <p>The Welsh Government has responded to the independent Land Use Climate Change report (March 2010) and accepted the majority of its recommendations. An implementation plan has been developed which includes knowledge transfer and R&D activity to reduce greenhouse gas emissions from Wales' ruminant livestock. The implementation plan is presently being reviewed</p>

Actions	Highlights of Delivery (2011-2012)
<p style="text-align: center;">5. New entrants</p>	<p>16 studentships (PhD's and MSc's) commissioned by HCC</p> <p>51 young farmers (aged under 40) took part in Farming Connect Red Meat Development Programme open days, discussion group meetings and events delivered by HCC until August 2011</p> <p>The Welsh Government Young Entrants Support Scheme 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</p> <p>A 2010 inquiry by the Equality and Human Rights Commission into recruitment and employment in the meat and poultry processing sector in England and Wales 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 sit on this task force to ensure that any actions specific to the Welsh meat and poultry processing sector are taken forward and dealt with accordingly</p>

Actions	Highlights of Delivery (2011-2012)
<p style="text-align: center;">6. Supply chain integration</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 Supply Chain Efficiencies Scheme (SCES) - part of Axis 1 of the Rural Development Plan for Wales 2007-2013 - provides financial support for co-operation projects that will develop new products, processes and technologies in the agriculture and food sector as well as in the forestry sector. This scheme is designed to help move 'embryonic' supply chain partnerships to a stage where they are confident to adopt a new supply chain process leading to greater tangible and intangible benefits. It would increase the capacity of producers to take costs out of the supply chain, improve marketing capability and ensure future sustainability. A total of 31 projects and close to £25 million investment have been awarded under the SCES. 5 projects are specifically focused on the Welsh red meat industry and all projects aim to improve linkages with the entire Welsh red meat supply chain. To achieve this the projects will be delivering training, information dissemination and knowledge transfer of new technologies</p>

Actions	Highlights of Delivery (2011-2012)
<p style="text-align: center;">7. Product development</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 the University of Wales Institute Cardiff (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</p> <p>The Processing and Marketing Grant Scheme - part of Axis 1 of the Rural Development Plan for Wales 2007-2013 - is designed to enable primary producers of agricultural and forestry products in Wales to add value to their outputs. It is also designed to improve the performance and competitiveness of their businesses; to respond to consumer demand; to encourage diversification and to identify, exploit and service new emerging and existing markets. 25 business have been awarded assistance and the nature of investment relates to adding value to Welsh red meat products</p> <p>HCC awarded 3 scholarships (to America and New Zealand) for 3 members of the Welsh red meat supply-chain to study to study charcuterie, sheep production and climate change (up from 2 scholars in 2010/2011)</p> <p>HCC funded 306 farmers to join study tours (to England, Belgium, France, Germany, Ireland, Northern Ireland, Norway, Italy, Romania, Scotland, USA and within Wales) for Welsh red meat producers</p>

Actions	Highlights of Delivery (2011-2012)
8. Information and advice dissemination	<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 issuing 112 press releases and specialist articles, undertaking 9 press events and facilitating on-site visits by farming and other trade journalists</p> <p>Dissemination of information and advice by HCC through literature, the HCC websites and attendance at events and shows - monthly Market Bulletins, in excess of 500 publications available, 'industry facing' and 'consumer facing' internet sites and approximately 3,000 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 through Farming Connect - 8 demonstration/ development farm events undertaken, 18 discussion group meetings facilitated, 18 technical factsheets published and 12 Gwlad articles published by HCC as a part of the Farming Connect Red Meat Development Programme until August 2011. Since September 2011, Farming Connect delivery has continued, delivered by Menter a Busnes, with 103 events undertaken, 22 factsheets published and technical articles and podcasts produced (covering a range of topics and promoting 'best practice' and providing technical information on stock management, health planning, breeding, grassland management, environmental management, nutrition and housing)</p> <p>42 meetings and events focused on genetic improvement in beef and sheep delivered by HCC. 634 beef and sheep farmers received training on genetic improvement and support for performance recording, Artificial Insemination (AI) or Embryo Transfer (ET) from HCC</p> <p>11 national and international events and shows attended by HCC to target consumers including the Royal Welsh Show, Winter Fair, Urdd National Eisteddfod, the Real Food Festival in London, Anuga (Germany) and Gulfood (Dubai)</p> <p>6 events for school pupils undertaken by HCC</p> <p>3 publications/ websites giving healthy diet advice to children and providing nutritional information for decision makers in the education and health services - sports booklet, student cookbook and student healthy eating website</p>

Actions	Highlights of Delivery (2011-2012)
<p style="text-align: center;">9. Regulatory development</p>	<p>The Welsh Government's Appetite for Life initiative (which aims to improve the food and drink provided in schools, has recommended standards which are to become statutory standards. The Minister for Education and Skills, Leighton Andrews AM, has agreed the timescale for the commencement of the provisions in the Healthy Eating in Schools (Wales) Measure. This includes introducing regulations around the food and drink provided in schools. The regulations will have effect from September 2012 in primary schools, and from September 2013 in secondary schools and special schools</p> <p>HCC responded to 14 relevant government and industry consultations, aimed at influencing policies and strategies affecting the Welsh red meat industry</p> <p>Frequent meetings held and sponsorship of events undertaken by HCC to raise awareness of Welsh red meat to politicians and policy makers in Cardiff Bay, London and Brussels</p> <p>In August 2011 the Minister for Business, Enterprise, Technology and Science, Edwina Hart AM and the Deputy Minister for Agriculture, Alun Davies AM; requested a report to investigate the regulatory burden on Welsh farmers and land managers in Wales. The "Working Smarter" report (published in January 2012) includes 74 recommendations to the Welsh Government on how to deliver better regulation within an appropriate framework, improved customer service for the farmers and a sector with increased profitability from a business perspective</p>

Actions	Highlights of Delivery (2011-2012)
<p style="text-align: center;">10. Contingency planning</p>	<p>A GB and Northern Ireland Contingency Plan has been produced by the Animal Health and the Veterinary Laboratories Agency on behalf of Defra and in association with Administrations in Wales, Scotland and Northern Ireland. The Plan is a strategic level document which demonstrates how all Administrations will work together to resolve an outbreak of exotic notifiable animal disease. The GB NI Plan compliments the plans produced by the individual Administrations and completes the picture of how diseases will be effectively managed</p>

FOCUS FOR DELIVERY OF THE ACTION PLAN IN 2012-2013

In order to monitor progress of delivery against Actions in 2011-2012, the Monitoring Sub Committee agreed to split the Actions into the following four categories for delivery.

1. Actions which have been fully completed

Actions within the Action Plan which have been fully achieved in 2009-2010, 2010-2011 or in 2011-2012 are highlighted in the tables in Annex 1.

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 2012-2013. 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 2012-2013. These are colour coded in the tables in Annex 2. The Actions are as follows:

- Seek to enhance the linkages between Welsh tourism and red meat production.

4. Actions which have not been fully achieved

In some instances Actions have not been fully achieved in 2011-2012 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 – Seeking PGI status for Welsh Pork is a longer term target. During 2011-2012 HCC initiated a review of the Welsh pork sector to gather data for inclusion in the specification.
- 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 has been prepared by HCC and sources of funding are now being investigated.

Annex 1

Actions which have been fully completed

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

	Objective	Action	Achievements
4. Environmental protection	To seek to mitigate the Welsh red meat industry's impact on the environment	Develop an environmental impact 'roadmap' for Welsh red meat production	'A sustainable future – the Welsh Red Meat Roadmap' was published by HCC in 2011-2012. Reviews of the Roadmap targets will be undertaken in 2013, 2016 and 2020 HCC continue to seek to mitigate the Welsh red meat industry's impact on the environment
		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 were adopted, where possible, by abattoirs and processors in 2009-2010 and 2010-2011 Alternative energy sources continue to be utilised, where possible, by abattoirs and processors across Wales to meet Regulatory requirements

	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 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 HCC continue to encourage the development of added value Welsh red meat products
		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

Annex 2

Achievements against Actions (2011-2012)

In the following tables achievements against actions (April 2011 to March 2012) 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 2011 - 2012	
		2009 - 2010	2010 - 2011	2011 - 2012		
1. Promotion	To advertise and promote Welsh red meat and promote the industry overall	Create an awareness of the Welsh red meat brands (e.g. PGI [Protected Geographical Indication], True Taste, Organic, etc.) and enhance their value amongst consumers (through retailers, food service, etc.)				Consumer opinion of Welsh Lamb as 'a brand I can trust' increased to 85% in Wales (from 84%) and increased to 82% in Meridian (from 65%) - <i>Source: Market Tools for HCC</i>
						Consumer opinion of Welsh Lamb as 'a brand for me' increased to 87% in Wales (from 78%) and measured at 44% in Meridian (2011/2012 is the base year) - <i>Source: Market Tools for HCC</i>
						Awareness of 'Wales the True Taste' brand amongst Welsh consumers and consumers in the rest of the UK at 18% and 2% respectively (compared to 17% and 2% respectively in 2010) - <i>Beaufort Research for the Welsh Government 2011</i>
						The True Taste Awards in November 2011 (organised by the Welsh Government) received 1,017 entries from 366 businesses (up from 700 entries in 2010/2011). 119 awards were given in total, 75 from product categories of which 23 were specifically from the meat sector
						The True Taste Awards winners in the 2011/2012 awards promoted by the Welsh Government through a PR agency throughout the UK; and through distribution of the Producer Directory and the True Taste magazine
						Sponsorship by HCC of 'Battle for the Dragon' (where teams from Germany, New Zealand, Sweden and Wales competed) and the Welsh Culinary Team at the International Culinary Championship (held in France)
						Sponsorship by HCC of 13 industry related events (including county shows, the Farmers' Union Wales conference, the NFU Cymru conference, the National Sheep Association 2011 event and the Super Meat and Fish Awards 2011)
						The Cywain programme managed by Menter a Busnes has been supported in 2011-12 by the Welsh Government and the Rural Development Plan. In 2011-12 there have been 18 projects that have been successful in developing new markets for Welsh meat producers
						2 trade development programmes (via Levercliff and Menter a Busnes) are managed by the Welsh Government. In 2011-12, 6 meat sector companies have participated actively
						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 maintained a presence of Welsh Lamb in UK restaurants by means of the Welsh Lamb Club network - 60 registered restaurants and 35 registered butchers/ distributors						
Over 560,000 Welsh Lamb and Welsh Beef labels distributed by HCC to retailers. HCC also worked with major multiples to incorporate logos into packaging						
Open up new markets for Welsh red meat (at home and in export), where appropriate, for prime red meat, veal, mutton, etc.					3 export markets attended by Welsh exporters alongside the Welsh Government and/ or HCC - Food & Hotel Asia in Singapore, Anuga in Germany and Gulfood in Dubai. 5 export events undertaken by HCC in Benelux, France, Germany and Italy. The Welsh Government showcased Welsh Lamb at the Alimentaria trade exhibition in Barcelona	
					4 exploratory market visits undertaken by the Welsh Government and/ or HCC - to Canada, China and Italy. The HCC market visit to Canada was supported via an OMIS report by the Welsh Government. 3 inward trade missions undertaken by HCC to Germany and Spain	
					Market access discussions undertaken with Defra by the Welsh Government and HCC for Canada, China and Russia export markets. Red meat market research/buyer project in Russia supported by the Welsh Government via an OMIS report	
					Market opportunities for Welsh red meat investigated by HCC (including Canada, China, Russia, the USA and Vietnam)	
					HCC membership of UK Export Certification Partnership (UKECP) which seeks to open up markets for UK exports	

Objective	Action	Progress			Achievements 2011 - 2012
		2009 - 2010	2010 - 2011	2011 - 2012	
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.			Regular meetings between HCC and Welsh Health Supplies undertaken. Discussions held between HCC and YHA and with school food procurers The Welsh Government has been working with caterers and food producers with arrangements to supply caterers to the London Olympics 2012 Contact with Welsh show and event organisers maintained by HCC to encourage use of Welsh red meat
		Promote the value of the Welsh red meat industry and products, livestock breeds, livestock genetics and live exports			Increase in consumers in Wales and Meridian reporting that Welsh Lamb was a 'brand they could trust' - 85% (from 84%) and 82% (2011/2012 is the base year) respectively. Increase in consumers in Wales and Meridian also reporting that Welsh Lamb was a 'brand for them' - 87% (from 70%) and 44% (2011/2012 is the base year) respectively - Source: Market Tools for HCC HCC promoted Welsh red meat brands by means of integrated advertising (TV, print media and digital), press relations, on-pack sales promotions and marketing literature (including recipe leaflets), at the point of sale. Welsh Lamb TV advertising in the Wales and Meridian TV regions was undertaken by HCC during September/ October 2011. Welsh Beef TV advertising in the Wales TV region undertaken by HCC in December 2011 The Welsh Government promoted 10 promotional grant applications (the same number as in 2010/2011) which encompassed red meat products as part of their activity e.g. as part of a wider exhibition or event HCC developed a section on the HCC website to promote industry and marketing information to pork producers. HCC facilitated master classes for pork producers - focused on sausage making, bacon curing, pork butchery and charcuterie
	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 - review of the Welsh pork sector underway gathering data for inclusion in the specification
		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 – 54 annual inspections and 14 unannounced inspections undertaken Enforcement authorities provided with ongoing support by HCC in regard to Welsh Lamb and Welsh Beef. HCC attended a workshop for Trading Standards Officers in November 2011, to update them on PGI 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 2011 - 2012
		2009 - 2010	2010 - 2011	2011 - 2012	
2. Research activity and training	Undertake relevant, cost effective research activity which meets the needs of the Welsh red meat sector whilst ensuring there is no duplication				Portfolio of Research and Development (R&D) projects focused on supporting the Welsh red meat industry maintained by HCC - 7 maintained in 2011/2012. Projects quarterly evaluated by the HCC R&D 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 to investigate incorporating meat quality into commercial sheep breeding programmes
					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 Administrations, research councils and Living with Environmental Change (LWEC)
					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 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. Engagement for this period 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 Food Processing and Manufacturing Efficiency. The Welsh Government aim to facilitate partnerships between R&D and industry
					Official meat controls are prescribed by directly applicable EU legislation. The Food Standards Agency (FSA)'s Future Meat Controls Research Programme was set up in 2010 to gather the evidence necessary to support a case for regulatory reform, with the aim of moving towards a more risk-based, proportionate, targeted and cost effective system of official meat controls
					As part of its second phase of research in this area, the FSA has funded the following projects: a review of Food Chain Information and Collection and Communication of Inspection Results, a qualitative risk assessment of visual inspection of red meat and large game, a trial of visual inspection of outdoor fattening pigs, and a social science study into the interactions between the Food Business Operator and officials in the slaughterhouse environment
					As part of a third phase of research, and in order to take advantage of developments across Europe such as the European Food Safety Authority (EFSA) scientific opinion on pig inspection, the FSA aims to commission further research in 2012 in the following areas: implementation of EFSA Opinion based principles in the UK pig meat production sector, alternative official control models for poultry inspection, and use of Plant Inspection Assistants in Approved Game Handling Establishments
					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 accounted for 12% of UK red meat volume sales in 2011 (compared to 14% in 2010) . 52% of retail lamb sales in 2011 were to social classes AB and C1 (up from 49% in 2010). 57% of lamb consumers in the UK were retired or 'empty nesters' (2011/2012 is the base year). 60% of lamb sold in the UK in 2011 were chop/steaks and leg roasts (compared to 62% in 2010). 52% of volume sales of lamb in 2011 were in London, the Midlands and the South (compared to 53% in 2010) - <i>Kantar Worldpanel for HCC</i>
Consumer opinion of lamb research in 2010 commissioned by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU) demonstrated that consumer opinion remained fairly similar to findings in 2009 with taste, tenderness, leanness and price being key motivators for purchase - <i>Source: Beaufort Research for HCC</i> . The research also looked at why consumers do not buy lamb, such as its perceived lack of versatility, and ways these barriers could be overcome. A publication was developed and disseminated to independent retailers in November 2011					

Objective	Action	Progress			Achievements 2011 - 2012
		2009 - 2010	2010 - 2011	2011 - 2012	
2. Research activity and training (continued)	To support the improvement of business efficiency of the Welsh red meat industry				37 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 12 events (including the Royal Welsh Show and Winter Fair)
					Preparing animals for slaughter DVD produced and disseminated to over 3,000 producers by HCC, to aid producers in preparing livestock for market
					7 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 the Farming Connect scheme provides tailored one to one business and technical guidance and environmental advice 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 Farm Advisory Services. The Knowledge Transfer Programme delivery aims to help producers adopt new practices, benchmark performances, share ideas, address market needs and encourage innovation. It also supports the industry on cross cutting themes of environment and climate change, animal health and welfare, health and safety, biosecurity, effective use of ICT, women and young entrants. Information is disseminated via a range of delivery methods, e.g. Demonstration Farm projects, discussion groups, workshops, farm walks, podcasts, clinics and seminars
					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, safe use of veterinary medicines and health and safety practices). A Skills Assessment tool can identify any training and development opportunities and any new areas of expertise to develop for individuals and businesses
					Quality Management Procedures training continued by HCC in 21 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)
					The Wales Food Supply Chain Project - a collaborative project undertaken by Improve, Lantra, People 1st and Skillsmart Retail produced a report which confirms the combined industries in the food chain employ 230,000 workers making it the largest employer in Wales. Results were disseminated at a conference in Llandudno in October 2011. The outcomes from the project plus the report were also presented to AM's from all political parties (at a breakfast meeting) in November 2011. Case studies have also been developed (involving Dunbia) in collaboration with Careers Wales which include DVDs and other relevant materials, to promote careers along the food supply chain. This has been published as part of the Careers Wales 'Spotlight' series and the Improve 'Tasty Careers' brand
					Improve has engaged with a number of those providers currently delivering in the food & drink industry with a view to establishing a Wales Food & Drink Skills Academy. The proposal has been well received to date
					Meetings have been undertaken with Cardiff Metropolitan University to discuss their involvement in the ESF funded 'Work Based Learning' projects which fund up to 60 credits for employers/employees located in convergence areas in Wales
					Improve has actively canvassed the FE Institutions in Wales to deliver a 'Pathway to Apprenticeship' (at level 2) in food & drink manufacturing. Unfortunately no expressions of interest were received from the FEI network in Wales. However with support from Improve and the Apprenticeship Team in DFES, an agreement has been reached with Coleg Sir Gar to run a small 'pilot' which will focus on Food Technology
					Following the demise of the Food & Drink Advisory Partnership, both the Agri-Food Partnerships and Training & Skills Sub Group have agreed to continue as independent fora with the combined aim of lobbying Government and encouraging collaborative activity to deliver against the food & drink strategy
					The Welsh Government collects post-16 education and training data via the Lifelong Learning Wales Record (LLWR). There was 1 Foundation Apprenticeship (level 2) programme in the Meat and Poultry processing sector pursued between August 2010 and July 2011

Objective	Action	Progress			Achievements 2011 - 2012
		2009 - 2010	2010 - 2011	2011 - 2012	
3. Animal health and welfare	To promote the Welsh red meat industry overall				<p>In 2011 the Animal Health & Welfare Strategy (AHWS) Steering Group developed a new approach to the delivery of the GB AHWS objectives in Wales and how the work of the Steering Group should be prioritised moving forward. This involved a list of top "non Statutory" disease priorities which will be reviewed each year by the Steering Group: Beef - Bovine Viral Disease (BVD), Johne's and Liver Fluke Dairy - Johne's Disease, Lameness, Mastitis and BVD Sheep - Sheep Scab, Liver Fluke, Lameness and Lambing Losses</p> <p>The Welsh Government is undertaking interviews to appoint a new Chair to the AHWS Steering Group. Once appointed the new Chair will be engaged to scope the Groups' views on the way forward post 2014 when the GB AHWS Strategy comes to an end</p> <p>The AHWS Steering Group set up a Task and Finish group to consider ways to tackle Sheep Scab, including a review of legislation, examples of good practice and behaviour, treatment; and communication</p> <p>A sub-group of the AHWS Steering Group has been actively considering what further action can be taken in Wales to tackle Johne's disease. The sub-group continues to refine its thoughts and will present their findings and recommendations back to the Steering Group and Welsh Government</p> <p>The Welsh Government engage with external organisations to discuss Welsh research priorities</p> <p>In March 2012, Environment Minister John Griffiths announced a new Strategic Framework for Bovine TB Eradication covering the next four years which will build on existing cattle surveillance and control measures, biosecurity best practice and input received from stakeholder engagement. It also includes the vaccination of badgers within the Intensive Action Area</p> <p>HCC published 10 booklets/ factsheets/ leaflets focused on animal health and welfare for sheep and beef farmers (up from 5 booklets published in 2010/2011), including topics such as controlling liverfluke, reducing lamb losses and anthelmintic resistance - funded through the Rural Development Plan for Wales 2007-2013 (which is funded by the Welsh Government and the EU) and Farming Connect</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) - 67 farmers received support (testing 2,907 cattle), up from 2010/2011 where 60 farmers 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) - 40 farmers received support (2011/2012 is the first year of support)</p> <p>HCC published 6 '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 the Farming Connect scheme provides tailored one to one business and technical guidance and advice on a variety of topics (including feeding and breeding for improved performance and improving animal health) via the Whole Farm Plan and the Knowledge Transfer Programme delivery has placed a strong emphasis on animal health and welfare including the priorities identified in the Animal Health & Welfare Strategy. A total of 65 animal health related events were arranged during the period 01 September 2011 - 31 March 2012 and activities included the series of Lambing Focus events with John Vipond of SAC, Fluke Control in sheep and cattle and two pilot Farming Connect Sheep Scab Workshops</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)				<p>Defra undertake regular surveillance for diseases across GB and disseminate the findings to the other GB Administrations and stakeholders</p> <p>HCC reviewed the Parasitology Action Plan for Wales with input from the Parasitology Steering Group and an updated Action Plan was published in 2011. The Plan aims 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 maintained by HCC on 7 Demonstration Farms (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU). Additionally 2 factsheets on anthelmintics were disseminated by HCC</p>

Objective	Action	Progress			Achievements 2011 - 2012
		2009 - 2010	2010 - 2011	2011 - 2012	
4. Environmental protection	To seek to mitigate the Welsh red meat industry's impact on the environment				<p>The Supply Chain Efficiency Scheme (SCES) provides financial support for co-operation projects that will develop new products, processes and technologies in the agriculture and food sector as well as in the forestry sector. This scheme is designed to help move 'embryonic' supply chain partnerships to a stage where they are confident to adopt a new supply chain process leading to greater tangible and intangible benefits. It would increase the capacity of producers to take costs out of the supply chain, improve marketing capability and ensure future sustainability. The SCES is part of Axis 1 of the Rural Development Plan (RDP) for Wales 2007-2013 funded by the European Union and the Welsh Government. This is the first time that this type of scheme forms part of the RDP and, as such, it constitutes a pilot scheme</p> <p>A total of 31 projects and close to £25 million investment have been awarded under the SCES. 5 projects are specifically focused on the Welsh red meat industry, with one project having the specific aim to assess all new red meat industry innovations, their effectiveness in achieving the desired goal and their impact on the industry and the environment. Additionally the project will present this information to the industry in a clear, concise and unambiguous way, thus ensuring the meat industry is in the best position to meet market requirements efficiently and cost effectively project which are addressing the issue of mitigating the Welsh red meat industry's impact on the environment</p>
	Facilitate a coordinated approach to water management, pollution control and waste disposal, between industry and relevant private and public sector bodies				<p>The Welsh Government's Farming Connect Knowledge Transfer Programme has emphasised the business benefits of sound environmental management to the red meat sector at 51 events during the period 01 September 2011 - 31 March 2012. 11 factsheets, technical articles a podcasts have been produced. A range of topics have been covered including promoting best practice on soil management, nutrient management, efficient grassland utilisation and growing arable and forage crops to improve sustainability</p> <p>The final results of the Welsh Government and HCC funded research into bioreduction of fallen stock at Bangor University were received in November 2011. These have been analysed and a report is currently being drafted for submission to the EFSA for approval of on farm storage under European Regulation EC 1069/2009</p> <p>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 press relations</p> <p>The Farming Connect Red Meat Development Programme, delivered by HCC until August 2011, promoted new ideas and initiatives through its network of demonstration farms, discussion groups and knowledge transfer officers. Since September 2011 Farming Connect, delivered by Menter a Busnes, has delivered a knowledge transfer programme, maintained a network of demonstration farms and initiated one-to-one support</p>
	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 (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
	Provision of advice on agri-environment schemes				<p>The Welsh Government through the Farming Connect scheme provides tailored one to one business, technical guidance and environmental advice on topics including environmental management and land management via the Whole Farm Plan, and Farm Advisory Services (FAS). Farming Connect has supported businesses that are interested in applying for the Glastir All-Wales Element (AWE) by giving them mentoring and advice on the most suitable options for their farm. Farming Connect has also supported businesses that have applied for the Agricultural Carbon Reduction and Efficiency Scheme (ACRES) through FAS or the Whole Farm Plan service by completing nutrient management plans, slurry storage reports and energy efficiency reports. Farming Connect arranged 17 on-farm events held in September 2011 which were for farmers interested in applying to join the Glastir AWE that included sessions on identifying improved and unimproved land, wildlife and stream side corridor creation, arable options, field and woodland edge development and farm ponds</p> <p>The EA ensure advice on agri-environment schemes is available through events, publications and PR</p>
	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 press relations
	Encourage shared practice amongst producers on how individual businesses sustain production whilst delivering positive environmental management				<p>HCC published 6 '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</p> <p>The EA encourage shared practice amongst producers through the dissemination of information at events and through publications and press relations</p> <p>HCC awarded a scholarship to Australia and New Zealand for a member of the Welsh red meat supply-chain to study climate change (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU). The scholar will attend industry meetings throughout 2012 to disseminate the findings of their trips</p> <p>The Farming Connect Red Meat Development Programme, delivered by HCC until August 2011, promoted new ideas and initiatives through its network of demonstration farms, discussion groups and knowledge transfer officers. Since September 2011 Farming Connect, delivered by Menter a Busnes, has delivered a knowledge transfer programme, maintained a network of demonstration farms and initiated on-to-one support</p>

Objective	Action	Progress			Achievements 2011 - 2012
		2009 - 2010	2010 - 2011	2011 - 2012	
4. Environmental protection (continued)	To seek to mitigate the Welsh red meat industry's impact on the environment (continued)				<p>A sustainable future – the Welsh Red Meat Roadmap' was published by HCC in July 2011 - identifying strategies that will assist the Welsh red meat industry in responding to environmental change (including disposal of waste materials)</p> <p>The final results of the Welsh Government and HCC funded research into bioreduction of fallen stock at Bangor University were received in November 2011. These have been analysed and a report is currently being drafted for submission to the EFSA for approval of on farm storage under European Regulation EC 1069/2009</p> <p>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 EFSA. 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</p> <p>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</p> <p>The Welsh Government through Farming Connect provides knowledge transfer on best practice and one-to-one technical guidance via the Whole Farm Plan and the Farm Advisory Service</p>
	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				<p>The Welsh Government's Farming Connect Knowledge Transfer Programme aims to help producers prepare for the impact of and mitigate against, climate change and is the overarching theme of the programme as one of the cross cutting themes. During the period 01 September 2011 - 31 March 2012 climate change has been promoted at 100 events to the red meat sector. Topics include best practice on soil carbon management, the benefits of grassland based farming and production efficiencies since so many of the efficiencies required to achieve the target reductions in GHG emissions have a direct correlation with efficiencies in production, so-called win-win situations</p> <p>A sustainable future – the Welsh Red Meat Roadmap' was published by HCC in July 2011 - identifying strategies that will assist the Welsh red meat industry in responding to environmental change</p> <p>HCC published 6 '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</p> <p>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 administrations) Agriculture and Climate Change R&D Programme, of which the Greenhouse Gas Inventory R&D Platform is a major (£12.6 million) component. Under the programme consortia of research institutions are delivering specific methane emissions factors for a range of cattle and sheep systems</p> <p>The Welsh Government has responded to the independent Land Use Climate Change report (March 2010) and accepted the majority of its recommendations. An implementation plan has been developed which includes knowledge transfer and R&D activity to reduce greenhouse gas emissions from Wales' ruminant livestock. The implementation plan is presently being reviewed</p> <p>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 be monitored more accurately</p> <p>The Welsh Government through Farming Connect provides tailored one to one business and technical guidance and practical and regulatory training 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</p>
	Seek to reduce methane and nitrous oxide emissions from grass fed livestock				<p>HCC is funding a project to research new forage varieties to address future climate change issues, including greenhouse gas emissions. 4 studentships are also being funded by HCC, to seek ways of reducing the emissions of grass fed livestock</p>

Objective	Action	Progress			Achievements 2011 - 2012
		2009 - 2010	2010 - 2011	2011 - 2012	
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)			<p>16 studentships (PhD's and MSc's) commissioned by HCC (up from 14 studentships in 2010/2011) including topics such as climate change mitigation, novel grass varieties, control strategies for cryptosporidium and inventory calculations for measuring greenhouse gas emissions</p> <p>The Food Industry Centre at Cardiff Metropolitan University 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>
		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 until August 2011 (when Farming Connect contract finished) - 51 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 (aged 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, leadership development and business development</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 provides practical and regulatory training to assist in improving working practices, complying with legislation, encouraging diversification on a variety of topics, identifying appropriate training opportunities and supports the introduction to business planning course. Farming Connect provides assistance to Young entrepreneurs through the Whole Farm Plan service with business and financial advice on business planning, and raise awareness of career opportunities in the Welsh red meat industry. The Farming Connect Knowledge Transfer Programme have established and delivered Young Entrant Discussion Groups (targeted at under 40s) across Wales, 11 Discussion Group meetings delivered during the period 01 September 2011 - 31 March 2012. A successful established group is the Penybont Discussion Group in Powys attracting over 30 young farmers to their discussion group meetings regularly</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>An 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 sit on this task force to ensure that any actions specific to the Welsh meat and poultry processing sector are taken forward and dealt with accordingly. The EHRC has undertaken a formal review to assess the extent to which relevant bodies have effectively implemented the recommendations in the inquiry report and continues to work with companies to implement these recommendations</p>	

Objective	Action	Progress			Achievements 2011 - 2012
		2009 - 2010	2010 - 2011	2011 - 2012	
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			<p>Welsh Government has worked with Regional Tourism Partnerships across Wales to organise 5 'meet the buyer' events which have featured meat producers at each event</p> <p>Welsh Government has liaised with Visit Wales to explore the linkages between Welsh tourism and Welsh production</p>
		Seek to have a Retailer Ombudsman appointed to regulate supermarkets			<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>
	Support development of multiple retailer and co-operative networks to strengthen branding, market share and market intelligence and to provide training opportunities			<p>The SCES provides financial support for co-operation projects that will develop new products, processes and technologies in the agriculture and food sector as well as in the forestry sector. This scheme is designed to help move 'embryonic' supply chain partnerships to a stage where they are confident to adopt a new supply chain process leading to greater tangible and intangible benefits. It would increase the capacity of producers to take costs out of the supply chain, improve marketing capability and ensure future sustainability. The SCES is part of Axis 1 of the Rural Development Plan (RDP) for Wales 2007-2013 funded by the European Union and the Welsh Government. This is the first time that this type of scheme forms part of the RDP and, as such, it constitutes a pilot scheme</p> <p>A total of 31 projects and close to £25 million investment have been awarded under the SCES. 5 projects are specifically focused on the Welsh red meat industry and all projects aim to improve linkages with the entire Welsh red meat supply chain. To achieve this the projects will be delivering training, information dissemination and knowledge transfer of new technologies</p>	

Objective	Action	Progress			Achievements 2011 - 2012
		2009 - 2010	2010 - 2011	2011 - 2012	
7. Product development	To encourage the development of added value Welsh red meat products				<p>HCC maintain an ongoing dialogue with Welsh processors and exporters to encourage development of new/ alternative market sectors and products</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 the University of Wales Institute Cardiff (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 Food Centre Wales - Horeb SCE project (funded through the Rural Development Plan for Wales 2007-2013) aims to increase the support for innovation along the food supply chain in Wales, to encourage the economic growth of the sector through exploitation of that innovation, and underpin the sustainability of this growth through the development of a skilled workforce. In order to achieve this aim the project will provide primary producers through either their links with secondary food businesses, or through their own diversification with:</p> <ul style="list-style-type: none"> • Research and development • Training and mentoring • Guidance on new product development • Technical advice • Opportunities for collaboration • Access to the skills of qualified Food Technologists for food producers who cannot normally afford the up front costs of new product development <p>The Food Technology Centre Welsh Food Added Value project (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU) aims to increase communication and integration between supply chain partners, in order to nurture and drive a collaborative ethos between primary producers, processors and end users. It has the following six key themes:</p> <ul style="list-style-type: none"> • Developing collaborative initiatives with primary food producers and food processors that develop efficient supply chain partnerships in Wales • New Product Development utilising local farm produce • To carry out research and development with primary food producers or food collaborations in order to create new products • To provide specialist mentoring for food producers and food collaborations to improve the skill base within Wales through specialist training programmes • To provide food producers and food collaborations with advice on primary and secondary food packaging in order to reduce material costs and improve environmental performance • To develop cost effective processes for food producers and food collaborations to develop innovative ways of utilising wastage <p>There are strong elements of industrial research within two of the six themes which are to carry out research and development with primary food producers or food collaborations in order to create new products; and to develop cost effective processes for food producers and food collaborations to develop innovative ways of utilising wastage. The project will provide high level support and guidance to individuals and groups of primary producers for researching and developing food products, improving the efficiency of production and ensuring that adequate skills are being developed to service the needs of the industry</p>
	Encourage the development of innovative ways of utilising the fifth quarter, hides and skins and offal products to encourage utilisation of the entire carcass				<p>Ongoing encouragement by HCC for the development of innovative ways of utilising the fifth quarter, hides, skins and offal products. Market access opportunities to China pursued by HCC and a market report including the type of products sought in the market. Further market opportunities report in progress by HCC, due for completion in April 2012</p> <p>Market opportunities for Welsh red meat fifth quarter, hides, skins and offal investigated by HCC (including China and Vietnam)</p>
	Encourage further processing and packing facilities within Wales				<p>The Processing and Marketing Grant Scheme is part of Axis 1 of the Rural Development Plan (RDP) for Wales 2007-2013 funded by the European Union and the Welsh Government. It is designed to enable primary producers of agricultural and forestry products in Wales to add value to their outputs. It is also designed to improve the performance and competitiveness of their businesses; to respond to consumer demand; to encourage diversification and to identify, exploit and service new emerging and existing markets. 25 business have been awarded assistance and the nature of investment relates to adding value to Welsh red meat products</p>
	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			<p>HCC awarded 3 scholarships (up from 2 scholars in 2010/2011), to America, Australia and New Zealand, for members of the Welsh red meat supply-chain to study charcuterie, sheep production and climate change (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU). The scholars from 2010/2011 attended 16 industry meetings to disseminate the findings of their trips</p> <p>HCC funded 306 farmers to join study tours (to England, Belgium, France, Germany, Ireland, Northern Ireland, Norway, Italy, Romania, Scotland, USA and within Wales) 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)</p>
	Support the uptake of automated carcass grading systems (such as Video Image Analysis [VIA]) in Welsh abattoirs			<p>HCC project proposal developed and sources of funding are now being investigated</p>	

Objective	Action	Progress			Achievements 2011 - 2012
		2009 - 2010	2010 - 2011	2011 - 2012	
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				<p>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</p> <p>Guidance notes for compliance with legislation is published by the Welsh Government on an ongoing basis (including electronic identification - EID and Food Chain Information)</p> <p>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</p> <p>HCC targeted relevant trade, consumer and general media, through press releases, specialist articles and on-site visits by farming and other trade journalists - 112 press releases and other specialist articles issued by HCC. 9 press events undertaken by HCC</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 Government and the EU). 12 Market Bulletins and 1 special Bulletin published by HCC. 15 industry focused publications produced by HCC. In excess of 500 publications currently available from HCC, including the Little Book of Meat Facts 2011. 'Industry facing' and 'consumer facing' internet sites maintained and expanded by HCC - over 2,500 unique visitors per month. Approximately 3,000 liveweight price text messages issued by HCC on a weekly basis (for beef and sheep)</p>
	Deliver a network of demonstration farms, development farms and discussion groups and disseminate best practice responsibly to the industry				<p>A network of demonstration farms, development farms and discussion groups maintained through Farming Connect. 8 demonstration/development farm events undertaken, 18 discussion group meetings facilitated, 18 technical factsheets published and 12 Gwlad articles published by HCC as a part of the Farming Connect Red Meat Development Programme until August 2011 (when Farming Connect contract finished). Since September 2011, Farming Connect delivery has continued, delivered by Menter a Busnes, with 103 events undertaken, 22 factsheets published and technical articles and podcasts produced (covering a range of topics and promoting 'best practice' and providing technical information on stock management, health planning, breeding, grassland management, environmental management, nutrition and housing)</p>
	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				<p>42 meetings and events focused on genetic improvement in beef and sheep delivered by HCC (up from 10 in 2010/2011). 634 beef and sheep farmers received training on genetic improvement and support for performance recording, Artificial Insemination (AI) or Embryo Transfer (ET) from HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU) (up from 394 farmers in 2010/2011)</p> <p>HCC's unit cost of production project benchmarked physical and financial data from 70 beef and sheep farms and disseminated the results to the industry (up from 37 farms in 2010/2011). 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)</p> <p>The Welsh Government through Farming Connect provides tailored one to one business and technical guidance and environmental advice 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. The Knowledge Transfer Programme delivery aims to help producers adopt new practices, benchmark performances, share ideas, address market needs and encourage innovation. It also supports the industry on cross cutting themes of environment and climate change, animal health and welfare, health and safety, biosecurity, effective use of ICT, women and young entrants. Information is disseminated via a range of delivery methods. Information is disseminated via a range of delivery methods, e.g. Demonstration Farm project, discussion groups, workshops, farm walks,</p>
	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				<p>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</p> <p>9 national events and shows attended by HCC to target consumers, including the Royal Welsh Show, Winter Fair, Halford Road Race, Urdd National Eisteddfod, the Real Food Festival in London, Taste of London, Nursing in Practice, Taste of Xmas and St Davids Day market. 2 international events and shows attended by HCC to target consumers - Anuga (Germany) and Gulfood (Dubai)</p> <p>6 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)</p> <p>Several thousand copies of Cool2Cook (red meat cook book aimed at children) distributed by HCC via school events and through shows such as the Royal Welsh and Urdd National Eisteddfod</p> <p>HCC attended 3 University Freshers Fairs in Aberystwyth, Bangor and Cardiff and attended 5 events at Newport College, Newport University and Glamorgan University; raising awareness of the importance of red meat in the diet</p> <p>3 publications/ websites giving healthy diet advice to children and providing nutritional information for decision makers in the education and health services (sports booklet, student cookbook and student healthy eating website published. Phone applications for both the Android and iPhone systems also produced by HCC (funded through the Rural Development Plan for Wales 2007-2013 which is funded by the Welsh Government and the EU)</p> <p>HCC published 6 '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</p> <p>Tastings and cooking demonstrations provided at events worldwide (including the Taste of London, the Taste of Christmas (in London), St Davids Day Market (in London) and the URDD [Welsh language youth organisation])</p>

Objective	Action	Progress			Achievements 2011 - 2012	
		2009 - 2010	2010 - 2011	2011 - 2012		
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				<p>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</p> <p>The Welsh Government through Farming Connect provides tailored one to one business and technical guidance and environmental advice on a variety of topics (including assisting farmers to meet cross-compliance requirements) via the Farm Advisory Services. A range of delivery methods are in place to disseminate key industry messages and new developments through our range of delivery tools, strategic awareness events and through the Knowledge Transfer Programme</p>
		Improve nutritional standards of food and drink provided in schools in Wales				<p>6 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)</p> <p>The Welsh Government's Appetite for Life initiative aims to improve the food and drink provided in schools, through encouraging school meal providers to work towards more challenging food and nutritional standards, including meat and meat products standards. The meat and meat products standard aims 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. The Appetite for Life recommended standards are to become statutory standards. The Minister for Education and Skills, Leighton Andrews AM, has agreed the timescale for the commencement of the provisions in the Healthy Eating in Schools (Wales) Measure. This includes introducing regulations around the food and drink provided in schools. The regulations will have effect: - from September 2012 in primary schools - from September 2013 in secondary schools and special schools</p>
		Influence global/ EU/ UK/ Welsh policies and strategies to ensure commercial performance is not adversely affected				<p>HCC responded to 14 relevant government and industry consultations, aimed at influencing policies and strategies affecting the Welsh red meat industry</p> <p>Frequent meetings held and sponsorship of events undertaken by HCC to raise awareness of Welsh red meat to politicians and policy makers in Cardiff Bay, London and Brussels</p>
		Interact with the Welsh Government Task Force and the Red Tape Review				In August 2011, the Minister for Business, Enterprise, Technology and Science (BETS), Edwina Hart AM, and the Deputy Minister for Agriculture, Alun Davies AM, requested a report to investigate the regulatory burden on Welsh farmers and land managers in Wales. The "Working Smarter" report (published in January 2012) includes 74 recommendations to the Welsh Government on how to deliver better regulation within an appropriate framework, improved customer service for the farmers and a sector with increased profitability from a business perspective
		Ensure interaction with policy makers to ensure Welsh interests are protected				<p>The Welsh Government, FSA Wales and HCC maintained a dialogue with key Government Ministers through regular meetings</p> <p>Frequent meetings held by HCC and sponsorship of events undertaken by HCC to raise awareness of Welsh red meat to politicians and policy makers in Cardiff Bay, London and Brussels</p>
		Investigate the links between cross compliance and farm assurance to ensure there is no duplication or additional burden				The "Working Smarter" report (published in January 2012) includes recommendations to the Welsh Government on how to minimise duplication or additional burden in relation to compliance checks. A Welsh Government team has been set up to deliver against the recommendations

Objective	Action	Progress			Achievements 2011 - 2012	
		2009 - 2010	2010 - 2011	2011 - 2012		
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)				<p>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 Contingency Plan for Exotic Animal Diseases sets out the structures and processes for dealing with exotic animal disease in Wales. The Plan is fully consistent with, and ties into, the GB&NI Plan and is reviewed annually</p> <p>A GB and Northern Ireland Contingency Plan has been produced by the Animal Health and the Veterinary Laboratories Agency (AHVLA) on behalf of Defra and in association with Administrations in Wales, Scotland and Northern Ireland. The Plan is a strategic level document which demonstrates how all Administrations will work together to resolve an outbreak of exotic notifiable animal disease. The GB NI Plan compliments the plans produced by the individual Administrations and completes the picture of how diseases will be effectively managed</p> <p>The Welsh Government has undertaken work to identify and assess vulnerabilities facing the Welsh food supply chain should operational, financial, external or market disruptions be experienced</p>

Annex 3

Action Plan Monitoring Sub Committee Members

HCC Board Members

Dai Davies (*Monitoring Sub Committee Chair*)

Gwynn Angell Jones

Richard Rogers

Wyn Williams

Industry Representatives

FUW Livestock, Wool & Marts Committee Chair - Dafydd Roberts

NFU Cymru Livestock Board Chair - Peter Davies

Welsh Government Officials

Food and Market Development Division - Paula Whitfield

Scientific, Evidence & Assessment Branch - Barbara McLean

HCC Executives

Siôn Aron Jones

Kirsten Hughes