

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



**2014-2015**

**Annual Monitoring Report**

## **BACKGROUND**

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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 the then Minister for Rural Affairs.

The following vision for the industry is identified within the Strategic 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 Strategic 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**

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A Monitoring 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 Strategic Action Plan. Current Committee members are listed in Annex 2.

The Committee is a unique group for monitoring performance against the Strategic Action Plan targets for the Welsh Red Meat Industry. Its role is crucial in ensuring transparency and it provides a valuable process in reviewing the ongoing contribution of partners within the red meat sector towards achieving the vision.

Evidence of achievements against the actions within the Strategic 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 Strategic Action Plan have been published each year from 2010 to 2014, summarising delivery against the targets within the Action Plan. It was reported that targets had either been completed or were progressing well during these years.

The 2014-2015 Annual Monitoring Report is the sixth output of the Monitoring Committee and covers the period 01 April 2014 to 31 March 2015.

In order to meet the needs of the industry and to achieve the objectives identified by the Strategic Action Plan, HCC issues a 3-year Corporate Plan in April each year, summarising 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 and **support personnel** in 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 (2014-2015)

The following tables highlight some of the achievements against actions for 2014-2015, with the detailed achievements recorded in Annex 1.

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 (2014-2015)
<p style="text-align: center;"><b>1. Promotion</b></p>	<p>HCC created an awareness of the 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. In particular there was increased focus on the use of social media with great success, resulting in substantial increases in opportunities to see promotional material across all social media channels using cost effective methods</p> <ul style="list-style-type: none"> <li>• HCC undertook Welsh Lamb TV advertising in the Wales and Meridian TV regions during September 2014 and Welsh Beef TV advertising in the Wales TV region in October 2014</li> <li>• Awareness of Protected Geographical Indication (PGI) Welsh Lamb and PGI Welsh Beef amongst consumers achieved 38 percent (from 30 percent) and 57 percent (from 35 percent) respectively</li> <li>• Propensity to purchase PGI Welsh Lamb and PGI Welsh Beef amongst consumers achieved 78 percent (from 76 percent) and 78 percent (from 77 percent) respectively</li> <li>• Awareness of Welsh Lamb and Welsh Beef as PGI products amongst consumers achieved 37 percent (from 29 percent) and was benchmarked at 22 percent respectively</li> </ul> <p>In 2014 the Welsh Government launched and published 'Towards Sustainable Growth: an Action Plan for the Food and Drink Industry 2014-2020'. The plan focuses on the delivery of actions to encourage industry growth and deliver on a number of other Welsh Government priorities including tackling poverty and the greening of growth. A new Welsh Government Food and Drink Wales website was also launched in March 2015. The website will further improve communications throughout the industry, reporting on business support, trade successes, new opportunities and policy development</p> <p>HCC worked to open up new markets for Welsh red meat (at home and in export):</p> <ul style="list-style-type: none"> <li>• Four export market trade shows attended by Welsh exporters (opening up markets and encouraging new product development) alongside HCC</li> <li>• Four exploratory market visits undertaken by HCC</li> <li>• 12 effective market development programmes completed by HCC across France, Italy, Germany and Belgium/ Luxembourg</li> <li>• HCC membership of UK Export Certification Partnership (UKECP) which seeks to open up markets for UK exports</li> </ul>

Actions	Highlights of Delivery (2014-2015)
<p style="text-align: center;"><b>1. Promotion (continued)</b></p>	<p>HCC supported 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):</p> <ul style="list-style-type: none"> <li>• HCC maintained relationships with six key account retailers and food service operators using where necessary sales promotion programmes to achieve enhanced on-pack and menu identification</li> <li>• HCC report that 99 percent of eligible independent retailers are utilising appropriate PGI Welsh Lamb and PGI Welsh Beef labelling</li> <li>• HCC maintained a presence of Welsh Lamb and Welsh Beef in foodservice operators by means of the Welsh Lamb Club - 75 percent of member restaurants reported by HCC to be identifying Welsh Lamb on the menu</li> <li>• HCC maintained a presence of Welsh Lamb and Welsh Beef in 233 Welsh independent retailers by means of the Butchers Club</li> </ul> <p>HCC encouraged procurement of Welsh red meat through brand awareness campaigns with key accounts. Support was also provided to cookery events and through sponsorship of events and HCC maintained contact with Welsh show and event organisers to encourage use of Welsh red meat</p> <p>73 Welsh public sector organisations have signed-up to the National Procurement Service (NPS) which was launched in November 2013. The success of the NPS will be measured in terms of increasing the opportunities for food businesses to supply the public sector, the number of suppliers and volume/range of product supplied, and the benefits to food producers targeting this marketplace</p> <p>HCC protected and enhanced the Welsh red meat brands through the PGI Abattoir and Cutting Plant Verification Scheme:</p> <ul style="list-style-type: none"> <li>• All abattoirs and cutting plants that wish to brand Welsh Lamb and/ or Welsh Beef are inspected annually by HCC. 62 annual inspections and 12 unannounced inspections were undertaken in 2014/15</li> <li>• Enforcement authorities were provided with on-going support by HCC in regard to Welsh Lamb and Welsh Beef</li> <li>• Enforcement authorities undertook regular inspections of PGI Welsh Lamb and PGI Welsh Beef in the retail sector</li> </ul>

Actions	Highlights of Delivery (2014-2015)
<p style="text-align: center;"><b>2. Research activity and training</b></p>	<p>HCC undertook relevant, cost effective research activity which met the needs of the Welsh red meat sector through a portfolio of R&amp;D projects:</p> <ul style="list-style-type: none"> <li>• Nine projects funded by HCC. Examples include a project to develop sustainable strategies for controlling liver fluke in cattle herds, the incorporation of industry data into the production of carcass trait EBVs to enable farmers to select breeding stock on traits that are relevant to what they get paid for, and breeding new grass and clover varieties that can mitigate against environmental damage caused by flooding or drought while being productive forage varieties</li> <li>• Projects quarterly evaluated by the HCC R&amp;D Committee (which is made up of the Welsh Government, HCC and industry representatives)</li> <li>• As well as being the sole funder on projects, HCC also works collaboratively with other similar organisations to cost-effectively contribute to larger scale projects that are relevant to the beef, sheep and pork sectors in Wales</li> </ul> <p>Defra manage all government research budgets on an England and Wales basis. Welsh Government officials worked closely with Defra counterparts to actively influence both programme and project development to ensure Welsh research needs are considered. R&amp;D programmes of relevance to the Welsh red meat sector include Sustainable Intensification Platform, Global Food Security Programme and UK Agri Technology Strategy</p> <p>The 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. The first phase of research was completed in September 2011. The second phase of research was completed in March 2013 following evaluation by independent experts. This phase consisted of:</p> <ul style="list-style-type: none"> <li>• a review of Food Chain Information and Collection and Communication of Inspection Results</li> <li>• a qualitative risk assessment of visual inspection of red meat and large game</li> <li>• a trial of visual inspection of fattening pigs from non-controlled housing conditions, and</li> <li>• a social research into the interactions between the Food Business Operator and officials in the slaughterhouse environment.</li> </ul> <p>The third phase of research was started in the spring of 2014.</p>

Actions	Highlights of Delivery (2014-2015)
<p style="text-align: center;"><b>2. Research activity and training (continued)</b></p>	<p>HCC provided training to meet the needs of the industry and enhance the skills base:</p> <ul style="list-style-type: none"> <li>• 55 beef, lamb and pork selection for slaughter courses for producers delivered by HCC at abattoirs and in industry events (funded by the Rural Development Plan [RDP] for Wales 2007-2013)</li> <li>• Industry events include carcass demonstrations at the Grassland event and Royal Welsh Agricultural Show where farmers are invited to take part in a competition to grade the carcasses. This interaction enables training to take place while engaging in conversations on other topical issues</li> <li>• Qwizdom technology (a new interactive learning tool that enables course participants to log their answers into a handset before and after the course) has been introduced at the selection for slaughter courses to monitor the increase in knowledge as a result of participating in the course. Results demonstrate that there is an increase in knowledge after the training</li> <li>• Enhanced training given to 23 SMEs on Quality Management Plans and engagement on-going (funded by the RDP for Wales 2007-2013)</li> <li>• Online training delivered to over 1,500 farmers to encourage the uptake of EID recording in sheep flocks (funded by the RDP for Wales 2007-2013)</li> </ul> <p>The Welsh Government, through the Farming Connect Skills Development Programme, has provided access to training courses throughout Wales for both practical and regulatory linked training; and delivered to the needs of the red meat industry in improving business and technical efficiency, improve working practices within a business, meet statutory requirements and encourage diversification on a variety of topics and into new areas of work (lambing techniques, sheep shearing, sheep dipping, foot trimming, food preparation and hygiene, butchery skills, trailer towing, safe use of pesticides, safe use of veterinary medicines, health and safety practices and risk assessments). A Skills Assessment tool has identified training and development opportunities and new areas of expertise for individuals and businesses to develop. There is also an Online Skills Assessment service available for farmers to assess their skills and training needs and can help identify skills and training requirements for individuals and businesses; approved Training Providers deliver the training needs identified</p> <p>Improve in Wales (the Skills Council for the UK's Food &amp; Drink Manufacturing and Processing Sector) has provided strategic training skills to help increase performance, growth and productivity. The skills needed are identified and national occupational standards are set that directly reflect the skills and knowledge required by the sector</p>

Actions	Highlights of Delivery (2014-2015)
<p style="text-align: center;"><b>3. Animal health and welfare</b></p>	<p>The Wales Animal Health &amp; Welfare Framework is a Programme for Government Commitment and was launched in July 2014. The Framework describes the long term vision for animal health and welfare in Wales through five strategic outcomes. The overarching objectives of the Framework are to build on progress made in Wales to further improve standards of animal health and welfare</p> <p>The Welsh Government bovine TB eradication programme is carrying out a long-term goal of eradicating bovine TB in Wales. The programme is aimed at dealing with all the sources of TB infection - controls are in place to tackle the disease in cattle and vaccinating badgers has started to deal with the infection in the badger population. It includes annual testing, cattle movement restrictions, biosecurity advice to farmers through the Cymorth TB initiative and badger vaccination in both the Intensive Action Area and across Wales where it is supported by the badger vaccination grant</p> <p>HCC supported the delivery of the Animal Health and Welfare Strategy: Wales Action Plan and undertake surveillance and/ or eradication (where appropriate) of disease/ pests likely to impact on the Welsh red meat industry:</p> <ul style="list-style-type: none"> <li>• The Parasitology Steering Group (facilitated by HCC) met and ensured that actions were being delivered in support of the Animal Health and Welfare Strategy</li> <li>• 32 meetings attended by HCC focussing on herd and flock health status. These meetings enable HCC to update and provide knowledge transfer messages on animal health issues</li> <li>• 45 farms are taking part in an HCC project to investigate the level of anthelmintic resistance on sheep farms in Wales. Of these, 24 farms have received their initial results that give an outline of the efficacy of the three original anthelmintic groups for roundworms on their farm (funded by the RDP for Wales 2007-2013)</li> <li>• Five veterinary practices have signed up two farms each onto the HCC Animal Health Surveillance Project, with investigations underway including calving intervals, cattle fertility, worm resistance in sheep and dermatitis in ewes udders (funded by the RDP for Wales 2007-2013)</li> <li>• Three farm events focusing on the importance of making good quality silage to prevent health issues at feeding were facilitated by HCC (funded by the RDP for Wales 2007-2013). A booklet was also produced highlighting the importance of good silage making practices to avoid health issues when feeding silage</li> <li>• Support of the industry initiates to develop sustainable worm control strategies for sheep and cattle. SCOPS (Sustainable Control of Parasites in Sheep) has been in existence for 10 years and is focused on slowing the development of resistance to anthelmintics to ensure a longer lifetime of these essential drug therapies. COWS (Control of Parasites Sustainably in Cattle) is a younger initiative focussed on developing guidelines to prevent the cattle sector experiencing the same problems that the sheep sector has with resistance in anthelmintics</li> </ul>

Actions	Highlights of Delivery (2014-2015)
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>3. Animal health and welfare (continued)</b></p>	<p>Number of cattle farms and sheep farms in Wales that are participating in the Premium Cattle Health Scheme and the Premium Sheep and Goat Health Scheme increased to 471 and 479 respectively in 2015</p> <p>Farming Connect's innovative and farmer focused approach enables businesses to improve and enhance high standards of animal health, welfare and biosecurity on farm. A series of animal health focused events were arranged during this period including sheep and beef health business clubs. These events focused on identifying and understanding key performance indicators influencing herd and flock performance, feeding options, and including consideration of outwintering stock options</p> <p>An industry led Bovine Viral Diarrhoea (BVD) sub-group has been developing a strategic approach to tackling BVD in Wales. The principles outlined in the BVD sub-group's proposals have been welcomed and endorsed by the Animal Health and Welfare Framework Group. Some further work commissioned to set out in more detail the actions that need to be taken and taking into account any potential options for accessing the next RDP to support the delivery</p>

Actions	Highlights of Delivery (2014-2015)
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>4. Environmental protection</b></p>	<p>The Welsh Government's Farming Connect Knowledge Transfer Programme has delivered a series of events promoting best practice, including rotational grazing, getting the most from your soil and drainage to increase productivity, improving grassland through effective methods of weed and rush control, focussing on soil and pasture management control and linking soil with trace elements</p> <p>Natural Resources Wales aims ensure that the natural resources of Wales are sustainably maintained, enhanced and used, now and in the future. The 2014-2017 Corporate Plan sets out the planned outcomes and priorities for Wales and annual reporting indicates good progress against key targets to date</p> <p>Farming Connect has supported a group of farmers through the Farmer Innovation Fund to help protect the environment and improve production efficiencies. The group worked in partnership with local veterinary practices to investigate ewe mortality by using post-mortem results to identify cause of death and any underlying disease which maybe present within local sheep populations</p> <p>HCC encourage shared practice amongst producers on how individual businesses sustain production whilst delivering positive environmental management through awarding scholarships for members of the Welsh red meat supply-chain to visit red meat industries around the world. Studies in 2014/15 included use of marginal land</p>

Actions	Highlights of Delivery (2014-2015)
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>4. Environmental protection (continued)</b></p>	<p>HCC has encouraged utilisation of local slaughtering/ processing facilities, where appropriate, in order to minimise the environmental impact of movements of livestock to slaughter:</p> <ul style="list-style-type: none"> <li>• 23 abattoirs/ cutting plants were supported by HCC to explore options for working with suppliers on factors influencing business efficiency and environmental impact (funded by the RDP for Wales 2007-2013)</li> <li>• HCC supported the improvement of links between abattoirs and producers in their locality through the provision of carcass selection training at abattoirs in Wales (funded by the RDP for Wales 2007-2013)</li> </ul> <p>In order to add value to the Welsh supply-chain by encouraging efficient disposal of waste materials and assist producers in adapting to and mitigating climate change, HCC has:</p> <ul style="list-style-type: none"> <li>• Published an environmental roadmap for the Welsh red meat industry in 2012 to investigate ways the sector could reduce its greenhouse gas emissions. An interim report was published in March 15 to gauge how the industry is progressing. The report said that efficiency improvements can be achieved in a number of ways and HCC are now considering future funding options to progress this work area</li> <li>• Delivered a series of meetings to abattoirs and producers to enhance awareness of factors affecting processing efficiency including presentation of livestock for slaughter</li> <li>• Participated in an industry forum on the use of pesticides in the grassland sector as part of the voluntary initiative. The forum promotes the responsible use of pesticides and disseminates messages to the industry. Recent work has prioritised informing farmers of changes to legislation on applying pesticides including requirements for training and certification</li> </ul> <p>In October 2014 the Welsh Government published its Review of climate change emissions and adaptation in the agriculture and land use sectors. The report provided an evidence base to develop actions to cut greenhouse gas (GHG) emissions and adapt to a changing climate. Three main areas for delivery of GHG reductions were identified: improved efficiency of agricultural production, expanding woodland and restoring peatland; and exploiting opportunities in rural areas for generating renewable energy. Risks to the sector from a changing climate and opportunities for taking action were also identified - these will contribute to the Sectoral Adaptation Plan for the Natural Environment. The report took a holistic view and opportunities for synergy and areas where trade-offs will need to be considered are also discussed</p>

Actions	Highlights of Delivery (2014-2015)
<p style="writing-mode: vertical-rl; transform: rotate(180deg);"><b>5. Support personnel</b></p>	<p>HCC supported further education opportunities in agriculture and key red meat areas - 14 studentships (PhD's and MSc's) with leading UK research institutions supported by HCC in 2014/15, 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 Farming Connect Agri Academy is an excellent example of investment in human and social capital. Those that have participated in Agri-Academy have demonstrated positive acts of leadership and joined various industry working groups to put their learning into practice</p> <p>Farming Connect has provided 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</p> <p>HCC promoted the Welsh red meat industry as a career opportunity and supported young farmer and new entrant's initiatives/ events:</p> <ul style="list-style-type: none"> <li>• DVD produced by HCC, highlighting the opportunities for employment amongst 16-18 year olds at each stage of the supply chain was distributed on an on-going basis - over 2,000 copies distributed</li> <li>• Young farmers/ new entrants encouraged through a range of HCC activities - including study tours and carcass selection courses</li> <li>• 'Know what you're looking at' publication disseminated by HCC to young people in conjunction with YFC. Nine YFC stock judging events attended by HCC to highlight best practice</li> </ul> <p>The Welsh Government Young Entrants Support Scheme (YESS) continued to provide 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 includes 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 and joint ventures); and access to funded mentoring services from established farmers</p> <p>The Welsh Government has had discussions with Aberystwyth University - IBERS to develop the two New Entrant Partnerships at Pwllpeiran Upland Research Platform. This will provide an opportunity for young persons under 40 with no permanent land holding to develop their farm business and integrate with innovative research programmes. The two farms will also play an important role in knowledge transfer to the farming industry. This is new and innovative approach that if successful could be used as a template for the development of a protocol for getting new entrants into the industry in Wales</p>

Actions	Highlights of Delivery (2014-2015)
5. Support personnel (continued)	<p>The Welsh Government commissioned an independent review in May 2013 by Malcolm Thomas MBE into the “Next Generation into Farming” with the aim of setting out a strategic way forward for the future of the industry and to inform the development of the next RDP for Wales 2014-2020. This review reported in May 2014 and identified the barriers affecting entry to the industry, discussed the barriers of exit and succession in the industry, considered the wider agricultural industry skills requirements and made recommendations on the support required by the next generation into farming</p>

Actions	Highlights of Delivery (2014-2015)
6. Supply chain integration	<p>With the aim of developing opportunities for Welsh food and drink businesses to supply multiple retailers, the Welsh Government operates a programme of Retailer Engagement through working in partnership with food industry contractors. The programme has been revised and prioritises building relationships with each of the major multiple retailers and also the ‘second tier’ retailers. Work with retailers has seen more Welsh product listings with multiple retailers</p> <p>The recently launched Welsh Government Food Tourism Action Plan provides the framework and reaffirms the clear links between food and tourism in Wales. The Action Plan has the overall aim to raise awareness of Welsh Food and Drink and make information about Welsh Food and Drink more widely available to businesses and visitors to Wales</p> <p>HCC enhanced linkages between tourism and red meat production/ products through the Red Meat Roadshow (funded through the RDP for Wales 2007-2013) which attended events over 13 days throughout Wales at popular tourist destinations. The Red Meat Roadshow included cooking demonstrations and copies of the 'Out &amp; About with the Welsh Red Meat Roadshow' booklet, encompassing aspects of Welsh food, culture and environment were distributed. An independent evaluation into the impact of the Welsh Red Meat Roadshow has produced the following results, compiled from a series of surveys conducted with people who attended the events:</p> <ul style="list-style-type: none"> <li>• 62 percent said their awareness of the nutritional benefits of red meat had increased as a result of the project</li> <li>• More than 65 percent stated they now intended to purchase Welsh meat more frequently</li> <li>• 45 percent said they would now take the country of origin into consideration when buying red meat</li> <li>• 19 percent said they were now consuming red meat more often following the project</li> </ul>

Actions	Highlights of Delivery (2014-2015)
<p><b>6. Supply chain integration</b> (continued)</p>	<p>The Supply Chain Efficiencies Scheme (SCES) – which is part of Axis 1 of the RDP 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. The 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 aims to increase the capacity of producers to take costs out of the supply chain, improve marketing capability and ensure future sustainability. 31 projects and approximately £34 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 deliver training, information dissemination and knowledge transfer of new technologies</p>

Actions	Highlights of Delivery (2014-2015)
<p><b>7. Product development</b></p>	<p>HCC has been working closely with all parts of the red meat supply chain including processors in Wales and exporters to encourage development of new/ alternative market sectors and products. This has included a programme to raise awareness of the role that producers and processors can play in extending shelf life of PGI Welsh Lamb</p> <p>HCC is providing on-going encouragement within the industry for the development of innovative ways of utilising the fifth quarter, hides, skins and offal products. A feasibility study into possibility of ‘Value’ range of Welsh Lamb for UK retail has been completed and disseminated to processors by HCC</p> <p>The Processing and Marketing Grant Scheme is part of Axis 1 of the RDP for Wales. 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 by the Welsh Government and the nature of investment relates to adding value to Welsh red meat products</p> <p>HCC continues to explore opportunities to support the uptake of automated carcass grading systems in Welsh abattoirs and utilising new technologies to measure meat yield. To this end, HCC has established an industry-wide group to consider automated carcase assessment and development of yield payment systems</p>

Actions	Highlights of Delivery (2014-2015)
<p><b>8. Information and advice dissemination</b></p>	<p>The Welsh Government issue 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 collate, analyse and disseminate relevant information and advice responsibly to the industry using relevant media and existing networks:</p> <ul style="list-style-type: none"> <li>• Dissemination of information and advice by HCC through literature, the HCC websites and attendance at events and shows</li> <li>• Live weight price text messages issued by HCC on a weekly basis (for beef and sheep) to over 2,000 recipients</li> <li>• 12 Market Bulletins have been published by HCC. 6 industry focused publications produced by HCC. An industry resource of approximately 750 publications is currently available from HCC, including the Little Book of Meat Facts 2014</li> <li>• 'Industry facing' and 'consumer facing' internet sites have been maintained and expanded by HCC – approximately 939,000 page views of the HCC website during the period</li> <li>• HCC Corporate Facebook page (775 likes) and twitter feeds (1,300 followers) maintained continuously</li> <li>• HCC targeted industry information to relevant trade, consumer and general media, through press releases and on-site visits by farming and other trade journalists - 130 press releases issued by HCC and 82 articles written</li> </ul> <p>A network of demonstration farms (23 supplying to the red meat sector), discussion groups and business clubs have been delivered and facilitated through Farming Connect. BVD, Johnes and Neospora Disease control and eradication projects have been established on a number of demonstration farms for the red meat sector. Lameness has also been featured as well as a project to establish the trace element status of beef herds and sheep flocks to identify any deficiencies or excesses with the overall aim of improving physical and financial performance. Discussion group meetings are an effective means of communicating up to date information and advice to farmers. A total of 154 discussion group meetings were delivered to the red meat sector by Farming Connect in 2014/1</p> <p>HCC has supported a range of business improvement activities and encourage shared practice amongst producers through:</p> <ul style="list-style-type: none"> <li>• HCC has attended 23 meetings and events with pedigree beef and sheep producers to encourage participation in genetic improvement activity</li> <li>• 4 publications produced and disseminated by HCC on cost of production/ benchmarking by HCC, including lamb and suckler calf cost of production</li> <li>• HCC awarded three scholarships for members of the Welsh red meat supply-chain, with visits to New Zealand, Australia and Ireland, to study meat eating quality, use of marginal land and succession planning. The scholars attend industry meetings to disseminate the findings of their trips</li> </ul>

Actions	Highlights of Delivery (2014-2015)
<p><b>8. Information and advice dissemination</b> (continued)</p>	<p>HCC has delivered 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:</p> <ul style="list-style-type: none"> <li>• Teaching materials for schools were produced and disseminated by HCC with the assistance of Meat and Education to promote the healthy eating message amongst schools and health professionals</li> <li>• HCC educational cookbooks distributed to schools and universities, at school events and through shows such as the Royal Welsh and Winter Fair</li> <li>• Tastings and cooking demonstrations were provided by HCC at events worldwide to demonstrate the versatility and nutritional benefits of red meat as part of a balanced diet</li> </ul>

Actions	Highlights of Delivery (2014-2015)
<p><b>9. Regulatory development</b></p>	<p>The Welsh Government, FSA Wales, Natural Resources Wales, HCC, trade organisations and farmers unions keep up to date with policy and strategic developments on an on-going 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 Healthy Eating in Schools (Nutritional Standards and Requirements) (Wales) Regulations 2013 came into force on 2 September 2013. These regulations set out the types of food and drink that should be provided during the school day; and define the nutrient content of school lunches. Schedule 3 of the regulations sets out that meat must be provided in primary schools on at least two days a week and in secondary schools on at least three days a week. The regulations also set out and how frequently meat products may be provided</p> <p>HCC influence policies and strategies to ensure commercial performance is not adversely affected:</p> <ul style="list-style-type: none"> <li>• HCC responded to all relevant government and industry consultations, aimed at informing policies and strategies affecting the Welsh red meat industry</li> <li>• 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</li> </ul> <p>The "Working Smarter" report, which investigated the regulatory burden on Welsh farmers and land managers in Wales, was published in January 2012. It recommended a simplified and improved way of working for both regulators and farmers in Wales and included recommendations to the Welsh Government. A Welsh Government team was set up to deliver against the recommendations and work is on-going</p>

Actions	Highlights of Delivery (2014-2015)
<p style="text-align: center;"><b>10. Contingency planning</b></p>	<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 was republished in October 2014 and complements the UK Contingency Plan for Exotic Notifiable Diseases of Animals</p> <p>The Welsh Government welcomed the findings of the Elliot Review into the Horsemeat crisis and continues to work closely with appropriate agencies including Defra's Food Chain Emergency Liaison Group, the Food Standards Agency Wales and the Animal Health and Welfare Framework Group to ensure food chain integrity in Wales and for Welsh produce and continued high standards of animal welfare in Welsh agriculture</p> <p>The "Review into the Resilience of Welsh Farming" report (published in January 2014) included recommendations to the Welsh Government on developing responses to risk and emergency events and maximising economic performance of Welsh agriculture. A Welsh Government team has been set up to deliver against the recommendations and work is on-going</p> <p>HCC contributed to Welsh Government and Defra contingency planning exercises to assist the industry during times of difficulty</p>

## OVERVIEW OF DELIVERY (2009-2015)

Since the launch of this Strategic Action Plan in 2009, progress against targets has been monitored on an on-going basis, with reports published on an annual basis. After six years of delivery, this report also seeks to review the overall impact of the Action Plan on the Welsh red meat industry.

The following tables highlight the key outcomes for the Welsh red meat industry between 2009 and 2015.

Actions	Outcomes (2009-2015)
<b>1. Promotion</b>	<p>Increased awareness of Welsh red meat products and brands</p> <ul style="list-style-type: none"> <li>• In 2013 (most recent data available), 79 percent of GB consumers reported that Welsh Lamb is a brand for them (compared to 67 percent in 2008)</li> <li>• Awareness of Welsh Beef amongst consumers in Wales increased to 57 percent in 2015 (from 42 percent in 2010)</li> </ul> <p>Increased value derived from Welsh red meat products and brands</p> <ul style="list-style-type: none"> <li>• UK retail sales value of Welsh red meat increased by 32 percent between 2009 and 2014, to £353 million annually</li> <li>• UK foodservice sales value of Welsh red meat increased by 20 percent between 2009 and 2014, to £36 million annually</li> <li>• Export sales value of Welsh red meat increased by 59 percent between 2009 and 2013, to £223 million annually</li> </ul> <p>Both Welsh red meat products and sub-brands supported whilst ensuring the strength of the Welsh brand is not diminished or undermined</p>
<b>2. Research activity and training</b>	<p>A Welsh red meat industry with access to a range of information and advice:</p> <ul style="list-style-type: none"> <li>• Supporting business development, efficiency and competitiveness</li> <li>• Able to trade effectively in a worldwide market place</li> <li>• Innovative and adopting new technologies</li> </ul>
<b>3. Animal health and welfare</b>	<p>A Welsh red meat industry with access to a range of information and advice, supporting business development, efficiency and competitiveness</p>
<b>4. Environmental protection</b>	<p>A Welsh red meat industry with access to a range of information and advice:</p> <ul style="list-style-type: none"> <li>• Capitalizing on environmental credentials</li> <li>• Maximizing contributions to the national climate and biodiversity debate</li> <li>• Facilitating food being produced in a sustainable manner</li> </ul>
<b>5. Support Personnel</b>	<p>Skill levels in the Welsh red meat industry enhanced, assisting in creating a more sustainable workforce</p>

Actions	Outcomes (2009-2015)
<b>6. Supply chain integration</b>	Welsh red meat industry partners cooperating and collaborating, to improve competitiveness and business performance, conserve resources where appropriate, and enhance supply-chain linkages and transparency
<b>7. Product development</b>	Collaborative ventures supported and new added value Welsh red meat products developed, resulting in the development of new markets, reduced waste and improved supply-chain efficiencies
<b>8. Information and advice dissemination</b>	<p>A Welsh red meat industry with access to a range of information and advice:</p> <ul style="list-style-type: none"> <li>• Supporting business development, efficiency and competitiveness</li> <li>• Enabling them to plan for and cope with global changes</li> <li>• Able to trade effectively in a worldwide market place</li> <li>• Capitalizing on environmental credentials</li> <li>• Maximizing contributions to the national climate and biodiversity debate</li> <li>• Facilitating food being produced in a sustainable manner</li> </ul> <p>The Welsh red meat industry encouraged to improve competitiveness and business performance through the adoption of technologies</p> <p>Consumers with access to information and advice of the nutritional value of Welsh red meat and the role of livestock production in maintaining the environment</p>
<b>9. Regulatory development</b>	New policy requirements/ regulations influenced to minimize regulatory burden
<b>10. Contingency planning</b>	Contingency plan in place to enable the Welsh red meat industry respond to difficulty/ crisis

## **WELSH RED MEAT INDUSTRY STRATEGIC ACTION PLAN: 2020 VISION**

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After six years of delivery under the current Strategic Action Plan it was felt that a new strategic direction was required for the Welsh red meat industry. The new Strategic Action Plan (2020 vision) is in development by HCC in close consultation with the Welsh red meat supply-chain and the Welsh Government. It is anticipated that this new, outcome-focused Action Plan will be launched in July 2015.

The 2020 Vision seeks to deliver '*a profitable, efficient, sustainable and innovative Welsh red meat industry which benefits the people of Wales, which is resilient to political and environmental change, and is capable of responding competitively to ever changing market trends*'.

The Strategic Action Plan identifies the priorities, objectives, targets and actions that will help to address key challenges and bring about a positive impact on the employment and the growth of the rural economy in Wales. It is intended to provide a pathway forwards whilst being flexible enough to allow the Welsh red meat industry to respond to changing circumstances in a timely and appropriate manner. This Action Plan seeks to be ambitious, yet realistic. It is outcome driven and, as such, specific financial targets for 2020 have been included for the first time, in order to provide a clear and focused measure of success.

As such, this is the last year of monitoring for the current Strategic Action Plan, as from April 2015 onwards delivery and outcomes will be measured against the targets of the new Action Plan. The Monitoring Committee of the HCC Board will continue to be responsible for the monitoring and evaluation of the Action Plan and Annual Monitoring Reports will be published. Given the inclusion of financial targets in the new Action Plan, it is anticipated that monitoring will be undertaken during late autumn when output figures have been published.

## **Annex 1**

### **Achievements against Actions (2014-2015)**

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In the following tables achievements against actions (April 2014 to March 2015) are colour coded to show the progress of delivery.

 Signifies that Actions were achieved

 Signifies that Actions were achieved but that increased emphasis was deemed to be required

 Signifies that delivery is underway but that Actions were not fully achieved

Objective	Action	Progress						Achievements 2014- 2015	
		2009/10	2010/11	2011/12	2012/13	2013/14	2014/15		
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], Organic, etc.) and enhance their value amongst consumers (through retailers, food service, etc.)							<p>HCC created an awareness of the 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. In particular there was increased focus on the use of social media with great success, resulting in substantial increases in opportunities to see promotional material across all social media channels using cost effective methods</p> <ul style="list-style-type: none"> <li>- HCC undertook Welsh Lamb TV advertising in the Wales and Meridian TV regions during September 2014 and Welsh Beef TV advertising in the Wales TV region in October 2014</li> <li>- Awareness of PGI Welsh Lamb and PGI Welsh Beef amongst consumers achieved 38% (from 30%) and 57% (from 35%) respectively. Source: <i>MetrixLAB &amp; Wright Research for HCC</i></li> <li>- Propensity to purchase PGI Welsh Lamb and PGI Welsh Beef amongst consumers achieved 78% (from 76%) and 78% (from 77%) respectively. Source: <i>Wright Research for HCC</i></li> <li>- Awareness of Welsh Lamb and Welsh Beef as PGI products amongst consumers achieved 37% (from 29%) and was benchmarked at 22% respectively. Source: <i>MetrixLAB &amp; Wright Research for HCC</i></li> </ul> <p>In 2014 the Welsh Government launched and published 'Towards Sustainable Growth: an Action Plan for the Food and Drink Industry 2014-2020'. The plan has been, and continues to be about actions, targets and timescales. Whilst not a high level strategy, it focuses on the delivery of actions to encourage industry growth and deliver on a number of other Welsh Government priorities including tackling poverty and the greening of growth. There are 48 actions in total. The actions show the Welsh Government as an active and supportive partner to industry, by providing clarity, certainty, and confidence</p> <p>With firm support from industry and complementing the Action Plan for the Food and Drink Industry 2014-2020, the Welsh Government has established a Food and Drink Wales Industry Board to bring the sector together and help drive sustainable growth. In July 2014, Robin Jones Managing Director of The Village Bakery was appointed as interim Chair of the shadow Board. Members of the Board have now also been appointed and the inaugural meeting was held on 11 March 2015</p> <p>A new Welsh Government Food and Drink Wales website was launched in March 2015. The website will further improve communications throughout the industry, reporting on business support, trade successes, new opportunities and policy development</p>
		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)							<p>HCC supported 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):</p> <ul style="list-style-type: none"> <li>- HCC maintained relationships with 6 key account retailers and food service operators using where necessary sales promotion programmes to achieve enhanced on-pack and menu identification</li> <li>- HCC report that 99% of eligible independent retailers are utilising appropriate PGI Welsh Lamb and PGI Welsh Beef labelling</li> <li>- HCC maintained a presence of Welsh Lamb and Welsh Beef in foodservice operators by means of the Welsh Lamb Club - 75% of member restaurants reported by HCC to be identifying Welsh Lamb on the menu</li> <li>- HCC maintained a presence of Welsh Lamb and Welsh Beef in 233 Welsh independent retailers by means of the Butchers Club</li> </ul>
		Open up new markets for Welsh red meat (at home and in export), where appropriate, for prime red meat, veal, mutton, etc.							<p>HCC worked to open up new markets for Welsh red meat (at home and in export):</p> <ul style="list-style-type: none"> <li>- 4 export market trade shows attended by Welsh exporters (opening up markets and encouraging new product development) alongside HCC - SIAL, Horecava, Gulfood and Horecate (compared to 4 in 2013/2014)</li> <li>- 4 exploratory market visits undertaken by HCC (compared to 3 in 2013/2014)</li> <li>- 12 effective market development programmes completed by HCC across France, Italy, Germany and Belgium/Luxembourg</li> <li>- HCC membership of UK Export Certification Partnership (UKECP) which seeks to open up markets for UK exports</li> </ul>
		Encourage procurement of Welsh red meat by Local Authorities, colleges, the army, hospitals, event and show organisers, other public sectors, etc.							<p>HCC encouraged procurement of Welsh red meat through brand awareness campaigns with key accounts. Support also provided to cookery events and through sponsorship of events and HCC maintained contact with Welsh show and event organisers to encourage use of Welsh red meat</p> <p>Through the Action Plan for the Food and Drink Industry 2014-2020 the Welsh Government support and encourage Welsh caterers to use Welsh products including Welsh red meat and also encourage the use of appropriate logos and emblems on menus and advertising. In that vein, Bwyd a Diod Cymru / Food and Drink Wales is the "identity" which has been successfully used in UK and International exhibitions over the past two years. It relies on simple imagery and messaging which continues to evolve and will be further refined under professional guidance</p> <p>73 Welsh public sector organisations have signed-up to the National Procurement Service (NPS) which was launched in November 2013. The success of the NPS will be measured in terms of increasing the opportunities for food businesses to supply the public sector, the number of suppliers and volume/range of product supplied, and the benefits to food producers targeting this marketplace. Welsh Government officials are actively engaged in the newly formed NPS Food Category Forum which is working up proposals for all Ambient, Frozen and Fresh Food supplied into the public sector</p> <p>The Welsh Government are working closely with the UK Government on all areas of the food supply chain including public sector procurement</p>
		Promote the value of the Welsh red meat industry and products, livestock breeds, livestock genetics and live exports							<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. In particular there was increased focus on the use of social media with great success, resulting in substantial increases in opportunities to see promotional material across all social media channels using cost effective methods. Welsh Lamb TV advertising in the Wales and Meridian TV regions was undertaken by HCC during September 2014. Welsh Beef TV advertising was undertaken by HCC in the Wales TV region in October 2014</p>
	To protect Welsh red meat and enhance the Welsh red meat brands	Develop PGI status for Welsh Pork						<p>During 2013-14 a Traditionally Reared Pedigree Welsh Pork TSG application was developed and is now proceeding through the Protected Food Name application process. Decision made by HCC Board that pursuing an application for PGI status for Welsh Pork is not appropriate and would duplicate the Traditionally Reared Pedigree Welsh Pork TSG</p>	
		Protect and enforce the PGI Welsh Lamb and Welsh Beef designations, to ensure compliance						<p>HCC protected and enhanced the Welsh red meat brands through the PGI Abattoir and Cutting Plant Verification Scheme:</p> <ul style="list-style-type: none"> <li>- All abattoirs and cutting plants that wish to brand Welsh Lamb and/ or Welsh Beef are inspected annually by HCC. 62 annual inspections and 12 unannounced inspections were undertaken in 2014/15</li> <li>- Enforcement authorities were provided with on-going support by HCC in regard to Welsh Lamb and Welsh Beef. Enforcement authorities undertook regular inspections of PGI Welsh Lamb and PGI Welsh Beef in the retail sector</li> </ul>	

Objective	Action	Progress						Achievements 2014- 2015
		2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	
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							<p>HCC undertook relevant, cost effective research activity which met the needs of the Welsh red meat sector through a portfolio of R&amp;D projects:</p> <ul style="list-style-type: none"> <li>- • Nine projects funded by HCC. Examples include a project to develop sustainable strategies for controlling liver fluke in cattle herds, the incorporation of industry data into the production of carcass trait EBVs to enable farmers to select breeding stock on traits that are relevant to what they get paid for, and breeding new grass and clover varieties that can mitigate against environmental damage caused by flooding or drought while being productive forage varieties</li> <li>- Projects quarterly evaluated by the HCC R&amp;D Committee (which is made up of the Welsh Government, HCC and industry representatives)</li> <li>- • As well as being the sole funder on projects, HCC also works collaboratively with other similar organisations to cost-effectively contribute to larger scale projects that are relevant to the beef, sheep and pork sectors in Wales</li> </ul> <p>The Welsh Government continue to work with external organisations to determine Welsh research priorities. Aim to influence research and evidence programme direction and facilitate collaboration where appropriate. Welsh Government work with Research Councils - BBSRC, NERC, LWEC, Research Institutes, Levy Bodies, Devolved Administrations and EU (EIP's). EIP to be integrated into next Farming Connect programme</p> <p>The Welsh Government have built links with Defra farming and land management evidence teams to explore synergies, joint priorities and opportunities; discuss ways to influence other funders (research councils, EU etc.) and discuss future ways of joint working</p> <p>Defra manage all government research budgets on an England and Wales basis. Welsh Government officials worked closely with Defra counterparts to actively influence both programme and project development to ensure Welsh research needs are considered. R&amp;D programmes of relevance to the Welsh red meat sector include Sustainable Intensification Platform, Global Food Security Programme and UK Agri Technology Strategy</p> <p>Engagement with the £70 million Agri-Tech Catalyst, run by Innovate UK and the Biotechnology and Biological Sciences Research Council, offering funding to innovative businesses and researchers to develop solutions to innovative solutions to challenges in the agri-tech sector</p> <p>Official meat controls are prescribed by directly applicable EU legislation. The 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</p> <p>The first phase of research was completed in September 2011</p> <p>The second phase of research, which began in autumn 2011, was completed and published in March 2013 following evaluation by independent experts. This phase consisted of:</p> <ul style="list-style-type: none"> <li>- a review of Food Chain Information and Collection and Communication of Inspection Results</li> <li>- a qualitative risk assessment of visual inspection of red meat and large game</li> <li>- a trial of visual inspection of fattening pigs from non-controlled housing conditions, and</li> <li>- a social research into the interactions between the Food Business Operator and officials in the slaughterhouse environment.</li> </ul> <p>Research into the modernisation of meat controls is also being carried out at European level by the European Food Safety Authority (EFSA). FSA research findings were made available to EFSA in order to inform its scientific opinion on pigs (published in October 2011), on poultry (published in June 2012) and on the remainder species (published in June 2013)</p> <p>The third phase of research was started in the spring of 2014. This phase consists of:</p> <ul style="list-style-type: none"> <li>- a social science project to review the impact of new legislation governing official controls in approved pig slaughterhouses</li> <li>- a social science project to evaluate the use of Spotters to assist official meat inspection in slaughterhouses</li> <li>- a review of improved Food Chain Information and Collection and Communication of Inspection Results</li> <li>- a review of the potential use of farm of origin information for more targeted inspection of <i>Cysticercus bovis</i>, and</li> <li>- a project to examine the relationship between seroprevalence in the main livestock species and presence of <i>Toxoplasma gondii</i> in meat</li> </ul>
	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						

Objective	Action	Progress						Achievements 2014- 2015
		2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	
3. Animal health and welfare	To support the improvement of business efficiency of the Welsh red meat industry							<p>The Wales Animal Health &amp; Welfare Framework is a Programme for Government Commitment and was launched at the Royal Welsh Show in July 2014. The Framework describes the long term vision for animal health and welfare in Wales through five strategic outcomes;</p> <ul style="list-style-type: none"> <li>• Wales has healthy productive animals</li> <li>• Animals in Wales have a good quality of life</li> <li>• People trust and have confidence in the way food is produced and the way public health is protected</li> <li>• Wales has a thriving rural economy</li> <li>• Wales has a high quality environment</li> </ul> <p>The overarching objectives of the Framework are to build on progress made in Wales to further improve standards of animal health and welfare</p> <p>HCC supported the delivery of the Animal Health and Welfare Strategy: Wales Action Plan</p> <ul style="list-style-type: none"> <li>- The Parasitology Steering Group (facilitated by HCC) met and ensured that actions were being delivered in support of the Animal Health and Welfare Strategy</li> <li>- 32 meetings attended by HCC focussing on herd and flock health status. These meetings enable HCC to update and provide knowledge transfer messages on animal health issues</li> <li>- 3 farm events focusing on the importance of making good quality silage to prevent health issues at feeding were facilitated by HCC (funded by the RDP for Wales 2007-2013). A booklet was also produced highlighting the importance of good silage making practices to avoid health issues when feeding silage</li> <li>- Support of the industry initiates to develop sustainable worm control strategies for sheep and cattle. SCOPS (Sustainable Control of Parasites) in sheep has been in existence for 10 years and is focused on slowing the development of resistance to anthelmintics to ensure a longer lifetime of these essential drug therapies. COWS (Control of Parasites Sustainably in Cattle) is a younger initiative focussed on developing guidelines to prevent the cattle sector experiencing the same problems that the sheep sector has with resistance in anthelmintics</li> </ul> <p>Number of cattle farms and sheep farms in Wales that are participating in the Premium Cattle Health Scheme and the Premium Sheep and Goat Health Scheme increased to 471 and 479 respectively in 2015</p> <p>In order to support the implementation of the Framework and take forward in partnership, six independent members were publically appointed in June 2014. The Wales Animal Health and Welfare Framework Group has a pivotal role in providing a recognised link between the Welsh Government, livestock keepers, animal owners, industry representatives and the veterinary profession. Following establishment of the Group it has initially focussed efforts on defining priorities, developing an evidence base and establishing partnership networks with a view to publishing its first annual Implementation Plan by the summer 2015</p> <p>An industry led Bovine Viral Diarrhoea (BVD) sub-group has been developing a strategic approach to tackling BVD in Wales. The principles outlined in the BVD sub-group's proposals have been welcomed and endorsed by the Animal Health and Welfare Framework Group. Some further work commissioned to set out in more detail the actions that need to be taken and taking into account any potential options for accessing the next RDP to support the delivery</p> <p>The Wales Animal Health and Welfare Framework is the Welsh Government plan for improving animal health &amp; welfare standards for kept animals. The Framework has succeeded the Great Britain Animal Health and Welfare Strategy in Wales. The Framework also considers the contribution to protecting public health, the economy and the environment. The Framework was launched at the Royal Welsh Show 2014</p> <p>The Welsh Government bovine TB eradication programme is carrying out a long-term goal of eradicating bovine TB in Wales. The programme is aimed at dealing with all the sources of TB infection - controls are in place to tackle the disease in cattle and vaccinating badgers has started to deal with the infection in the badger population. It includes annual testing, cattle movement restrictions, biosecurity advice to farmers through the Cymorth TB initiative and badger vaccination in both the Intensive Action Area (IAA) and across Wales where it is supported by the badger vaccination grant</p> <p>The third year of the Welsh Government's five-year badger vaccination project concluded in November 2014 in the IAA in west Wales where over 4,000 doses of the vaccination were successfully delivered. This project is aimed at developing a degree of immunity to bovine TB within the badger population to reduce the potential for the onward spread of infection to cattle and other badgers in the area</p> <p>Farming Connect's innovative and farmer focused approach enables businesses to improve and enhance high standards of animal health, welfare and biosecurity on farm. A series of animal health focused events were arranged during this period including sheep and beef health business clubs. These events focused on identifying and understanding key performance indicators influencing herd and flock performance, feeding options, and including consideration of overwintering stock options. Sheep and beef specific discussion group topics included focus on lambing, keeping disease off farms and suckler herd health and performance. Responding to industry needs, workshops were held addressing the issue of sheep scab, aimed at helping farmers gain an understanding of the disease, its diagnosis, treatments available and reducing disease risk. Workshops were also held on the benefits of faecal egg count monitoring, aimed at encouraging farmers to monitor worm populations on their own farms so they only treat when necessary. Silage analysis workshops were held to enhance producer understanding and facilitate better interpretation of silage analysis results and the nutritional requirements of different classes of livestock. BVD workshops aimed at highlighting the problem and helping and encouraging farmers to carry out an initial screen of their suckler beef herds for the presence of Bovine Viral Diarrhoea (BVD) virus. The Farming Connect programme also utilised a range of other innovative approaches communication routes and media to deliver key messages and support knowledge requirements of red meat producers specifically through its new Farm Enterprise Competition, drop-in clinics, on-farm demonstration events, discussion groups, factsheets, shows and exhibitions, as well as using new media such as podcasts</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 &amp; Welfare Strategy</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>The Animal and Plant Health Agency (APHA) Veterinary and Science Policy Advice Team and Veterinary Exotic Notifiable Diseases Unit undertook regular surveillance for diseases across GB, communicating their findings to the GB administrations accordingly. The APHA International Disease Monitoring and Risk Assessment team monitor and provide updates on emerging diseases from across the world. This enables GB Administrations to track both the domestic and International potential threats of disease incursion</p> <p>HCC undertake surveillance and/ or eradication (where appropriate) of disease/ pests likely to impact on the Welsh red meat industry:</p> <ul style="list-style-type: none"> <li>- 45 farms are taking part in an HCC project to investigate the level of anthelmintic resistance on sheep farms in Wales. Of these, 24 farms have received their initial results that give an outline of the efficacy of the three original anthelmintic groups for roundworms on their farm (funded by the RDP for Wales 2007-2013)</li> <li>- 5 veterinary practices have signed up two farms each onto the HCC Animal Health Surveillance Project, with investigations underway including calving intervals, cattle fertility, worm resistance in sheep and dermatitis in ewes udders (funded by the RDP for Wales 2007-2013)</li> </ul>

Objective	Action	Progress						Achievements 2014- 2015
		2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	
4. Environmental protection	To seek to mitigate the Welsh red meat industry's impact on the environment							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 aims to 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 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. A total of 31 projects and close to £34 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 presents 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 whilst addressing the issue of mitigating the Welsh red meat industry's impact on the environment
	Facilitate a coordinated approach to water management, pollution control and waste disposal, between industry and relevant private and public sector bodies							The Welsh Government's Farming Connect Knowledge Transfer Programme has delivered a series of events promoting best practice: <ul style="list-style-type: none"> <li>• Rotational Grazing</li> <li>• Getting the most from your soil and drainage to increase productivity</li> <li>• Improving grassland through effective methods of weed and rush control</li> <li>• Focus on soil and pasture management control</li> <li>• Linking soil with trace elements</li> </ul> <p>The Farm Advisory service offers one to one, confidential on-farm advice, that is tailored to the needs of the business, highlighting areas where improvements can be made or actions to be taken in managing facilities on farm and advice on upgrading farm infrastructure on water management, pollution control and waste disposal. Farming Connect has supported several beef and sheep projects within the Farmer Innovation fund which was launched in January 2014. Farmers received funding towards investigating an innovative and practical project which would help them tackle 'real' problems, improve production efficiencies whilst also protecting the environment</p> <p>The Welsh Government submitted an application to the European Food Safety Agency (EFSA) for consideration of an approved method of storing sheep carcasses prior to disposal. However, this was not supported by EFSA</p> <p>Natural Resources Wales aims ensure that the natural resources of Wales are sustainably maintained, enhanced and used, now and in the future. The 2014-2017 Corporate Plan sets out the planned outcomes and priorities for Wales and annual reporting indicates good progress against key targets to date</p>
	Encourage utilisation of local slaughtering/ processing facilities, where appropriate, in order to minimise the environmental impact of movements of livestock to slaughter							HCC has encouraged utilisation of local slaughtering/ processing facilities, where appropriate, in order to minimise the environmental impact of movements of livestock to slaughter: <ul style="list-style-type: none"> <li>- 23 abattoirs/ cutting plants were supported by HCC to explore options for working with suppliers on factors influencing business efficiency and environmental impact</li> <li>- HCC supported the improvement of links between abattoirs and producers in their locality through the provision of carcass selection training at abattoirs in Wales</li> <li>- Participated in an industry forum on the use of pesticides in the grassland sector as part of the voluntary initiative <a href="http://www.voluntaryinitiative.org.uk">www.voluntaryinitiative.org.uk</a>. The forum promotes the responsible use of pesticides and disseminates messages to the industry. Recent work has prioritised informing farmers of changes to legislation on applying pesticides including requirements for training and certification</li> </ul>
	Pursue environmental accreditations at plant level							Environmental accreditations were pursued by abattoirs and processors across Wales in order to successfully manage and minimise their environmental impacts and integrate sustainable business practices into their everyday operations. Waste, energy and carbon management and improved resource efficiency were pursued through the implementation environmental management systems, working towards environmental legislative compliance and undertaking environmental training
	Provision of advice on agri-environment schemes							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 to apply for Glastir Entry by providing mentoring and advice on the most suitable options for their farm. This provision also covers the business opportunity of accessing Glastir. During this period Farming Connect has supported businesses that have applied for the Glastir Efficiency Grants scheme by undertaking nutrient management plans, slurry storage, energy and water efficiency reports
	Encourage uptake of existing environmental audits available							Natural Resources Wales continues to encourage the uptake of environmental audits through the dissemination of information at events, the website and through publications and press relations
	Encourage shared practice amongst producers on how individual businesses sustain production whilst delivering positive environmental management							Natural Resources Wales aims ensure that the natural resources of Wales are sustainably maintained, enhanced and used, now and in the future. The 2014-2017 Corporate Plan sets out the planned outcomes and priorities for Wales and annual reporting indicates good progress against key targets to date. Natural Resources Wales provides advice on sustainable land and water use and integrated natural resource management to embed good practice through the dissemination of information at events and through publications and press relations
								HCC encourage shared practice amongst producers on how individual businesses sustain production whilst delivering positive environmental management through awarding scholarships for members of the Welsh red meat supply-chain to visit red meat industries around the world. Studies in 2014/15 included use of marginal land
								Farming Connect promoted new ideas and initiatives through its network of demonstration farms where results and lessons learned were disseminated to sheep and beef industry. The Farmer Innovation Fund encouraged collaborative industry developed projects to investigate an innovative and practical intervention to help tackle 'real' problems e.g. Beulah Speckled Face Improvement Group - Genetic breeding improvement and development of EBV's. The results of all these projects were disseminated through the knowledge transfer programme to demonstrate the benefit of adopting new technology and strategic approach to farming

Objective	Action	Progress						Achievements 2014- 2015
		2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	
4. Environmental protection (continued)	To seek to mitigate the Welsh red meat industry's impact on the environment (continued)							<p>HCC seek to add value to the Welsh supply-chain by encouraging efficient disposal of waste materials. HCC published an environmental roadmap for the Welsh red meat industry in 2012 to investigate ways the sector could reduce its greenhouse gas emissions. An interim report was published in March 15 to gauge how the industry is progressing. The report said that efficiency improvements can be achieved in a number of ways, including:</p> <ul style="list-style-type: none"> <li>- Improving the efficiency of livestock production</li> <li>- Optimising the number of calves per cow and lambs per ewe</li> <li>- Adopt effective feed rationing to reduce costs while improving growth rates to reduce the time an animal spends on farm before slaughter</li> <li>- Selecting stock with good genetic potential to improve growth rate and carcase characteristics</li> <li>- Incorporate legumes, such as red and white clover, into grass leys because they have a higher protein content than grass monocultures and have the capacity to fix nitrogen from the atmosphere, so reducing the need for bagged fertiliser</li> </ul> <p>HCC are now considering future funding options to progress this work area</p> <p>The Welsh Government submitted an application to the European Food Safety Agency (EFSA) for consideration of an approved method of storing sheep carcasses prior to disposal. However, this was not supported by EFSA</p> <p>Bangor University are now investigating what technical adjustments can be made for the system to be considered for approval for the disposal of pigs/poultry. Possible further developments for ruminant fallen stock is unlikely to gain approval in the near future</p> <p>Farming Connect has supported a group of farmers through the Farmer Innovation Fund to help protect the environment and improve production efficiencies. The group worked in partnership with local veterinary practices to investigate ewe mortality by using post-mortem results to identify cause of death and any underlying disease which maybe present within local sheep populations. Farming Connect continues to provide knowledge transfer ensuring that information is available to help producers adopt new practices, share ideas, and encourage innovation</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. Climate change was promoted at events to the red meat sector and topics included anaerobic digestion, the benefits of digestates (run in conjunction with WRAP), insights into Hydro and biomass systems and soil and grassland management</p> <p>HCC assist producers in adapting to and mitigating climate change</p> <p>HCC published an environmental roadmap for the Welsh red meat industry in 2012 to investigate ways the sector could reduce its greenhouse gas emissions. An interim report was published in March 15 to gauge how the industry is progressing. The report said that efficiency improvements can be achieved in a number of ways, including:</p> <ul style="list-style-type: none"> <li>- Improving the efficiency of livestock production</li> <li>- Optimising the number of calves per cow and lambs per ewe</li> <li>- Adopt effective feed rationing to reduce costs while improving growth rates to reduce the time an animal spends on farm before slaughter</li> <li>- Selecting stock with good genetic potential to improve growth rate and carcase characteristics</li> <li>- Incorporate legumes, such as red and white clover, into grass leys because they have a higher protein content than grass monocultures and have the capacity to fix nitrogen from the atmosphere, so reducing the need for bagged fertiliser</li> </ul> <p>and</p> <p>HCC are now considering future funding options to progress this work area</p> <p>HCC delivered a series of meetings to abattoirs and producers to enhance awareness of factors affecting processing efficiency including presentation of livestock for slaughter</p> <p>In October 2014 the Welsh Government published its Review of climate change emissions and adaptation in the agriculture and land use sectors. The report provided an evidence base to develop actions to cut greenhouse gas (GHG) emissions and adapt to a changing climate. Three main areas for delivery of GHG reductions were identified: improved efficiency of agricultural production, expanding woodland and restoring peatland, exploiting opportunities in rural areas for generating renewable energy. Risks to the sector from a changing climate and opportunities for taking action were also identified - these will contribute to the Sectoral Adaptation Plan for the Natural Environment. The report took a holistic view and opportunities for synergy and areas where trade-offs will need to be considered are also discussed</p> <p>The Welsh Government through Farming Connect has provided 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 seek to reduce methane and nitrous oxide emissions from grass fed livestock and is funding a project to research new forage varieties to address future climate change issues, including greenhouse gas emissions. 4 studentships were also being funded by HCC to seek ways of reducing the emissions of grass fed livestock</p>

Objective	Action	Progress						Achievements 2014- 2015
		2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	
5. Support personnel	To encourage new personnel into the Welsh red meat industry and support existing personnel							<p>HCC supported further education opportunities in agriculture and key red meat areas- 14 studentships (PhD's and MSc's) with leading UK research institutions supported by HCC in 2014/15, including topics such as climate change mitigation, novel grass varieties, control strategies for cryptosporidium and inventory calculations for measuring greenhouse gas emissions</p> <p>Cardiff Metropolitan University's Food Science Department offers comprehensive education in one of two routes linked towards food.</p> <ul style="list-style-type: none"> <li>- Food Science &amp; Technology (BSc &amp; MSc) - from the development of new foods to the study of how foods impact health, wellness, and disease prevention. Meeting the increasing demand for food science and technology expertise worldwide, our graduates provide the food industry and public with well-prepared and highly competent food science professionals</li> <li>- Food Production Management (BSc) - from the concepts and development of food to the production, management and leadership of food companies. This new degree programme was designed to ensure students have all of the necessary skills to not only lead a quality, technical or development department but also to manage and lead an entire food production company</li> </ul>
	Promote the Welsh red meat industry as a career opportunity and support young farmer and new entrant's initiatives/ events							<p>HCC promoted the Welsh red meat industry as a career opportunity and supported young farmer and new entrant's initiatives/ events:</p> <ul style="list-style-type: none"> <li>- DVD produced by HCC, highlighting the opportunities for employment amongst 16-18 year olds at each stage of the supply chain was distributed on an on-going basis - over 2,000 copies distributed</li> <li>- Young farmers/ new entrants encouraged through a range of HCC activities - including study tours and carcass selection courses</li> <li>- 'Know what you're looking at' publication disseminated by HCC to young people in conjunction with YFC. 9 YFC stock judging events attended by HCC to highlight best practice</li> </ul> <p>The Welsh Government Young Entrants Support Scheme (YESS) continued to provide 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 includes 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 and joint ventures); and access to funded mentoring services from established farmers</p> <p>The Farming Connect Agri Academy is an excellent example of investment in human and social capital. Those that have participated in Agri-Academy have demonstrated positive acts of leadership and joined various industry working groups to put their learning into practice. A number of the recommendations from the Review of Further Education Colleges by Professor Wynne Jones supports the current Farming Connect programme and proposals to expand delivery under the 2014 - 2020 RDP. This will help develop the vision for a modern and professional agricultural industry in Wales, embedding a culture of continuous professional development and improved business focus. There is a specific commitment to personal development, professionalism and modern practice forming an attractive career option for aspiring entrants and to help those already in the industry to keep up with the evolving technological developments and business competitiveness.</p> <p>Farming Connect has provided 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. Business plans and skills assessments have been prepared on behalf of young farmers seeking to access YESS funding. The Skills Development Programme has provided 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</p> <p>The Welsh Government have had discussions with Aberystwyth University - IBERS to develop the two New Entrant Partnerships at Pwllpeiran Upland Research Platform. This will provide an opportunity for young persons under 40 with no permanent land holding to develop their farm business and integrate with innovative research programmes at Pwllpeiran. The two farms will also play an important role in knowledge transfer to the farming industry. It is envisaged that the application process will start in September 2015, with a view to getting tenancy agreements in place by March 2016. Discussion are on-going to ensure BPS National Reserve, YESS and Glastir are available to the new entrants if possible. Farm Business Tenancies will run for five years. This is new and innovative approach that if successful could be used as a template for the development of a protocol for getting new entrants into the industry in Wales</p> <p>The Welsh Government commissioned an independent review in May 2013 by Malcolm Thomas MBE into the "Next Generation into Farming" with the aim of setting out a strategic way forward for the future of the industry and to inform the development of the next RDP for Wales 2014-2020. This review reported in May 2014 and identified the barriers affecting entry to the industry, discussed the barriers of exit and succession in the industry, considered the wider agricultural industry skills requirements and made recommendations on the support required by the next generation into farming.</p> <p>The findings and recommendations of the report (which included widening the Young Entrants Support Scheme [YESS], establishing a Joint Opportunities Platform to help create a network of information and mentoring services and help new entrants looking for a route into the industry, creating more opportunities for training, development and continuous personal development and creating policies to support exit from the industry to make way for newcomers) have been welcomed by the Welsh Government and work has progressed to integrate the recommendations into Welsh Government policy</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)							

Objective	Action	Progress						Achievements 2014- 2015
		2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	
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>With the aim of developing opportunities for Welsh food and drink businesses to supply multiple retailers, the Welsh Government Food Division operates a programme of Retailer Engagement through working in partnership with food industry contractors. The programme has been revised and prioritises building relationships with each of the major multiple retailers and also the 'second tier' retailers. Work with retailers has seen more Welsh product listings with multiple retailers and the recent launch of the Ocado on-line Welsh shop</p> <p>The recently launched Welsh Government Food Tourism Action Plan provides the framework and reaffirms the clear links between food and tourism in Wales. The Action Plan has the overall aim to raise awareness of Welsh Food and Drink and make information about Welsh Food and Drink more widely available to businesses and visitors to Wales</p> <p>HCC enhanced linkages between tourism and red meat production/ products through the Red Meat Roadshow (funded through the RDP for Wales 2007-2013) which attended events over 13 days throughout Wales at popular tourist destinations. The Red Meat Roadshow included cooking demonstrations and copies of the 'Out &amp; About with the Welsh Red Meat Roadshow' booklet, encompassing aspects of Welsh food, culture and environment were distributed. An independent evaluation into the impact of the Welsh Red Meat Roadshow has produced the following results, compiled from a series of surveys conducted with people who attended the events:</p> <ul style="list-style-type: none"> <li>• 62 percent said their awareness of the nutritional benefits of red meat had increased as a result of the project</li> <li>• More than 65 percent stated they now intended to purchase Welsh meat more frequently</li> <li>• 45 percent said they would now take the country of origin into consideration when buying red meat</li> <li>• 19 percent said they were now consuming red meat more often following the project</li> </ul>
	Seek to enhance the linkages between Welsh tourism and red meat production							
	Seek to have a Retailer Ombudsman appointed to regulate supermarkets							
6. Supply chain integration	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 aims to 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 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 £34 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 deliver training, information dissemination and knowledge transfer of new technologies</p>
	Support development of multiple retailer and co-operative networks to strengthen branding, market share and market intelligence and to provide training opportunities							
	Support development of multiple retailer and co-operative networks to strengthen branding, market share and market intelligence and to provide training opportunities							
7. Product development	To encourage the development of added value Welsh red meat products							<p>HCC has been working closely with all parts of the red meat supply chain including processors in Wales and exporters to encourage development of new/alternative market sectors and products. This has included a programme to raise awareness of the role that producers and processors can play in extending shelf life of PGI Welsh Lamb</p> <p>The Food Knowledge Transfer programme (KITE project), delivered by the University of Wales Institute Cardiff (UWIC), aims to support 50 companies in Wales with a further 111 companies receiving disseminated results through workshops and conferences. Through employing graduate/ suitably qualified food technologists, it is estimated that 82 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 RDP for Wales 2007-2013)</p> <p>The Food Centre Wales - Horeb SCES project (funded through the RDP for Wales) 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 to underpin the sustainability of this growth through the development of a skilled workforce. In order to achieve this aim the project provides primary producers (through either their links with secondary food businesses or through their own diversification) with Research and development, Training and mentoring, Guidance on new product development, Technical advice, Opportunities for collaboration and Access to the skills of qualified Food Technologists for food producers who cannot normally afford the up front costs of new product development</p>
	Support and develop new Welsh branded products							
	Encourage the development of innovative ways of utilising the fifth quarter, hides and skins and offal products to encourage utilisation of the entire carcass							HCC is providing on-going encouragement within the industry for the development of innovative ways of utilising the fifth quarter, hides, skins and offal products. A feasibility study into possibility of 'Value' range of Welsh Lamb for UK retail has been completed and disseminated to processors by HCC
	Encourage further processing and packing facilities within Wales							The Processing and Marketing Grant Scheme is part of Axis 1 of the RDP for Wales. 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 by the Welsh Government and the nature of investment relates to adding value to Welsh red meat products
7. Product development	To encourage the uptake of technology within the Welsh red meat industry							HCC encouraged the industry to utilise experiences from around the world, in regard to red meat production by awarding 3 scholarships for members of the Welsh red meat supply-chain, with visits to New Zealand, Australia and Ireland, to study meat eating quality, use of marginal land and succession planning. The scholars will attend industry meetings throughout 2015 to disseminate the findings of their trips. The scholars from 2013/2014 attended 11 industry meetings to disseminate the findings of their trips
	Encourage the industry to utilise experiences from around the world, in regard to red meat production							
7. Product development	Support the uptake of automated carcass grading systems (such as Video Image Analysis [VIA]) in Welsh abattoirs							HCC continues to explore opportunities to support the uptake of automated carcass grading systems in Welsh abattoirs and utilising new technologies to measure meat yield. To this end, HCC has established an industry-wide group to consider automated carcase assessment and development of yield payment systems
	Support the uptake of automated carcass grading systems (such as Video Image Analysis [VIA]) in Welsh abattoirs							

Objective	Action	Progress						Achievements 2014- 2015
		2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	
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, Natural Resources Wales, HCC, trade organisations and farmers unions all collate data on an on-going 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 on-going basis</p> <p>The Welsh Government issue 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 collate, analyse and disseminate relevant information and advice responsibly to the industry using relevant media and existing networks:</p> <ul style="list-style-type: none"> <li>- Dissemination of information and advice by HCC through literature, the HCC websites and attendance at events and shows</li> <li>- Live weight price text messages issued by HCC on a weekly basis (for beef and sheep) to over 2,000 recipients</li> <li>- 12 Market Bulletins have been published by HCC. 6 industry focused publications produced by HCC. An industry resource of approximately 750 publications is currently available from HCC, including the Little Book of Meat Facts 2014</li> <li>- 'Industry facing' and 'consumer facing' internet sites have been maintained and expanded by HCC - approximately 939,000 page views of the HCC website during the period</li> <li>- HCC Corporate Facebook page (775 likes) and twitter feeds (1,300 followers) maintained continuously</li> <li>- HCC targeted industry information to relevant trade, consumer and general media, through press releases and on-site visits by farming and other trade journalists - 130 press releases issued by HCC and 82 articles written</li> </ul>
	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 (23 supplying to the red meat sector), discussion groups and business clubs have been delivered and facilitated through Farming Connect. BVD, Johnes and Neospora Disease control and eradication projects have been established on a number of demonstration farms for the red meat sector. Lameness has also been featured at demonstration farm events and the impact of implementing a lameness plan (five point plan), as well as a project to establish the trace element status of beef herds and sheep flocks to identify any deficiencies or excesses with the overall aim of improving physical and financial performance. Discussion group meetings are an effective means of communicating up to date information and advice to farmers. A total of 154 discussion group meetings were delivered to the red meat sector by Farming Connect during this period. The Farming Connect business clubs also covered topics such as 'Know your flock', introduction to comparable farm profit in lamb production, feed and forage cost focus and business planning for the next five years</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>HCC has supported a range of business improvement activities and encourage shared practice amongst producers through: :</p> <ul style="list-style-type: none"> <li>- HCC has attended 23 meetings and events with pedigree beef and sheep producers to encourage participation in genetic improvement activity</li> <li>- 4 publications produced and disseminated by HCC on cost of production/ benchmarking by HCC, including lamb and suckler calf cost of production</li> <li>- HCC awarded three scholarships for members of the Welsh red meat supply-chain, with visits to New Zealand, Australia and Ireland, to study meat eating quality, use of marginal land and succession planning. The scholars attend industry meetings to disseminate the findings of their trips</li> </ul> <p>Farming Connect has provided 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 home grown forage, 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 Service. The Knowledge Transfer Programme aims to help producers adopt new practices, benchmark performances, share ideas, address market needs and encourage innovation. A demonstration farm project continues to examine the causes of prolapse in pregnant ewes and developed alternative management/feeding options to help alleviate the problem. The Farmer Innovation Fund has provided the opportunity for groups of Welsh farmers to obtain funding towards investigating an innovative and practical project which would help tackle 'real' problems, improve production whilst also protecting the environment. Seven of the projects, which are farmer led, and relate to the red meat industry, including; understanding lamb growth rates and faecal egg counts in the performance of finishing lambs, practical assessment of different strategies to improve grassland and nutrient management, optimising lamb value from feeding plantain, genetic improvement of Beulah Speckled Face Sheep and ewe post-mortem group</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	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.)						<p>Farming and Countryside Education (FACE) helps children and young people to learn about food and farming in a sustainable countryside. Food and farming supports many areas of the curriculum, from science and maths to art and history. Farm visits, school farmers markets and classroom activities provide ideal opportunities to support education for sustainable development and global citizenship and out of classroom learning</p> <p>HCC has delivered 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:</p> <ul style="list-style-type: none"> <li>- Teaching materials for schools were produced and disseminated by HCC with the assistance of Meat and Education to promote the healthy eating message amongst schools and health professionals</li> <li>- HCC educational cookbooks were distributed to schools and universities, at school events and through shows such as the Royal Welsh and Winter Fair</li> <li>- Tastings and cooking demonstrations were provided by HCC at events worldwide to demonstrate the versatility and nutritional benefits of red meat as part of a balanced diet</li> </ul>	



## **Annex 2**

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

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#### **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 – Lyndon Edwards

#### **Welsh Government Officials**

Agriculture and Rural Affairs Division – David Lloyd-Thomas

#### **HCC Executives**

Julie Finch

Kirsten Hughes