GIRA Meat Club 2026

2nd & 3rd December 2026, Crowne Plaza Hotel Geneva

Annual Meeting Agenda

Wednesday 2 December 2026 : 08h15-18h00 CET

08:15 Introduction

08:30 Key drivers & brakes, and disruptors in the global meat market

- Rising costs: Oil, feed, labour…
- Pressured trade dynamics
- Disruptors to the forecasts - what isn't built in!

Global Synthesis: Rising costs, and pressured consumers

- Overview: High oil, and rising tensions, a year of uncertainty
- Key global forecasts: Production, trade, consumption & prices

Weak Signals - on the horizon, but not changing todays outlooks

09:35 Poultrymeat Global Synthesis: production falling short of potential market

- Rising production costs squeeze margins
- Production moving East, but over-expansion a serious short term risk
- The role of China as a major exporter

EU Poultry: broiler production limited by planning & disease

- Production growth moving East?
- Fragmentation of EU welfare & environmental regulations
- Mercosur agreement done: but antibiotic issue counters

Q&A

10:30 Break

11:00 Middle East - how have the markets really been disrupted by Iran/US war

- Beyond the war - is Saudi's drive for self-sufficency sustainable?
- Disruption to imports in the Gulf region

Brazilian poultry: Rising productivity, can they add value?

- Mercosur - the detail of the deal, and the shake out
- Will rising costs moderate production outlook?
- Export relationships maturing in the face of Chinese chicken!

China: production surges

- Export market diversification
- Will China still import?

USA Poultry: Booming on the back of high beef prices

- Domestic market canabalising exports
- Is profitability driving investment?

Special topic - PPWR - EU packaging legislation, distracting or game changing?

Q&A

13:00 Lunch

14:00 **Pigmeat Global Synthesis: contradictions**

- Global oversupply or weak demand? - producer price challenges
- China moves into export gear
- Failing to benefit from high beef prices

China pork: Production fails to decline fast enough

- Are losses on farm in 2026 enough to supress 2027 production?
- Oversupply motivating export trend - long term challenger?
- Imported feed the only way forward?

Special topic - Spain's battle with ASF - progress, but slow

EU pigmeat regulation killing long term production

- What future for NW European pig industry?
- Losses at the farm gate

Panel - Regulation as the limiting factor

15:30 **Break**

16:00 **USA pork: Carcass weights balance lower pig numbers**

- Profitability erroded despite high beef prices
- Trump and cross border trade - how important is Canada to US pork?
- Prop-12 - repercussions and real world consequences!

Brazil: exports boom, but how can they compete with China?

- Reorganising the supply chain
- Export boom - key focus markets

Other Asia: Negative demand shift as oil & inflation bite

- Short-term disruption but long-term potential
- Invesments in modern farms
- Can China enter the markets as a supplier?

Mexico

- Reorganising production - but exports falter

Closing comments

18:00 **Session concludes**

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Thursday 3rd December 2026 08h30-16h30 CET

08:30 **Beef Global Synthesis: Global supply tightens, but have prices peaked?**

- US pulling beef off the world market
- Trade in the balance - who are the real winners?
- Losing the consumers - can they still afford beef?

EU Beef: prices ease, despite falling supply

- Is the drive for beef on dairy complete? can it deliver more?
- Mercosur and the Brazilian ban!
- Tight EU supply, who wins?

New Zealand Beef: Unrealised potential

- The situation now
- The barriers to realising dairy beef potential

Australian Beef: cattle cycle turns, will El Niño delay it?

- Limits to cattle numbers on feedots?
- Export pull, balancing the US pull

Q&A

10:20 **Break**

10:50 **China Beef: The impact of the Safegaurd quotas**

- Building domestic supply - what is the potential?
- Import limitations - a year of two halves
- The impact of Beef Safegaurd going forward

Brazilian Beef: production falls as prices boom

- When will production recover from current cycle?
- What is behind the EU ban, is it really two years?
- Brazilian beef exports, pivoting to Trumps quota?

Other South American Beef: Can they take advantage of Brazil's EU absence?

- Changing beef production systems
- US and EU competing for beef, or is it a complementary opportunity?

Special Topic - Indian Markets: The winners and losers in India's protein race

- What is driving India's demand explosion?
- Balancing domestic opportunities with exports

USA Beef: Is the import pull a permanent global factor?

- Domestic production continues to fall
- Imports fail to fill the supply gap

Q&A

12:50 **Lunch**

13:50 Opportunities in W.Africa ruminant markets

UK: Tightening consumer spending impacts meat demand

Are Brazilian traders pivoting product from the EU to the UK?

Import potential beyond the traditional EU sources

Sheep Global Synthesis: Tightening global supply balance

Challenges in western markets able to be offset by gains in Asia?

High global prices able to drive production growth, or too late?

European sheepmeat: disease burden continues to weigh against rebuilding

As production loses further ground, is it losing critical mass?

Can imports support the market?

Australian sheepmeat: Restructuring after loss of live trade

Increased exports look to North America, despite Trump!

How is the India export market developing?

New Zealand: Are they topping out in the Asia markets, or short term issues?

NZ Ag policy, is it really supportive to producers, or political smoke?

Is lamb important on the domestic market?

China: Can sheepmeat benefit from tight beef supply

How is the sheep flock restructuring?

The outlook for premium meats in China

Closing comments and Q&A

16:25 Session concludes