



Gira Asia Meat Club 2024

Manila Hotel, Manila, Philippines

DRAFT Meeting Agenda

Thursday 15th February 2024

Session 1 - Key Global and Asian Meat Market Dynamics & Drivers

08:30 Registration

09:00 Welcome

Global Meat Market Context
Asian Meat Market Overview
2024 Asian Market Disruptors

Special Topic **Philippines - Changing Consumer Habits**

A record year for Brazil, but challenges elsewhere
China remains quiet, but rest of Asia sees cautious growth
Brazilian HPAI, US elections, Energy Costs and War

10:30 Coffee Break - 30 mins

11:00 Feed ingredient dynamics in Asia
Asian Lamb Markets

Reliant on imports, and global prices
Increased import pull as Demand booms

Special Topic **Sustainability - Asian Interpretation and Implementation**

12:30 Lunch - 1 hour in the hotel

Session 2 - Pigmeat

13:30 Pigmeat Global Overview
Japan
South Korea
China - Huge overcapacity at farm level

EU supply falling, US loss-making, BR consistent
Weak demand signals persist
ASF challenge spreads, dampening production growth
Consumers have moved on, How is the market restructuring

15:15 Q&A

15:30 Coffee Break - 30 mins

16:00 Thailand
Vietnam
Philippines
Asian Pigmeat overview

Restructuring of production in a weak demand environment
Industry restructuring, does the ASF vaccine help or hinder?
Strong imports in a weak market
Recovering supply, with less Chinese market stress

Special Topic **Implementation of Animal Vaccines - distraction or booster**

17:30 Finish

18:30 Networking BBQ Dinner

Friday 16th February 2024

Session 3 - Poultrymeat

08:30 Poultrymeat Global Overview
Philippines
Japan
Special Topic ** Brazilian HPAI - Year One Lessons **
China

HPAI disruption subsides
Producers take cautious line as demand remains weak
???
Lost supply and the impact on market balance
White feathered broiler industry on the rise

09:50 Q&A

10:20 Coffee Break - 30 mins

10:50 **Special Topic ** Malaysian HPAI - Can the industry restructure ****

11:10 Thailand
Vietnam
Indonesia
India
Asian Poultrymeat overview

Exports faced with strong Brazilian volume growth
Domestic production investment displaces imports
Economic recovery and 2024 election drive demand growth
Domestic market fundamentals fuel growth, but higher costs
Growth underpinned by economic recovery, imports significant

12:30 Lunch - 1 hour in the hotel

Session 4 - Beef

13:30 Beef Global Overview
India
China

Australian prices tumble with increased availability
Can the Buffalo Industry invest for the future?
Weak economics limit short term potential, but growth expected

14:35 Q&A

14:50 Coffee Break - 30 mins

15:20 **Special Topic ** The role of Australian live imports in Asian supply****

Japan
Philippines
Vietnam
Asian Beef overview

Can demand recover from Covid disruption
Import growth as production stagnates
Has demand for beef stalled?
Demand looks to imports to meet growth

16:35 Concluding comments

17:00 Finish