



Gira Asia Meat Club – 2026

14th Edition

12th - 13th February 2026

New features, summary of service, structure and fees

Proposal – June 2025

Contact: Rupert Claxton
+44 1323 870137
rclaxton@girafood.com

Market Insights, Data and Forecasts by Species and Country:

Pork - Poultry - Beef - Sheepmeat

Country Reports

CHINA

Country report

INDIA

Country report

INDONESIA

Country report

JAPAN

Country report

MALAYSIA

Country report

PHILIPPINES

Country report

SOUTH KOREA

Country report

THAILAND

Country report

VIETNAM

Country report

SRI LANKA

Country overview

PAKISTAN

Country overview

SINGAPORE

Country overview

TAIWAN

Country overview

BANGLADESH

Country overview

Synthesis Reports

Feed Cost

Economic
Slowdown

ASIA Synthesis

Production - Consumption - Trade - Prices

China Pork System
Real oversupply or
poor management

Sustainability
Corporate drivers

Pigmeat

Poultrymeat

Beef

Sheepmeat

GLOBAL Synthesis

Production - Consumption - Trade - Prices

Global Pigmeat

Global Poultrymeat

Global Beef

Global Sheepmeat

DATA (for 2014-2024, 2025e, 2026f, 2030f)

2030 outlook... supported by data forecasts and explanation

5-year outlook as the Asian markets recovering from the economic drag that currently effects much of the region, and the impact of US trade policy changes. How does demand pick up from the currently weak situation? Is the emphasis on domestic or import supply? What is happening on the ground to drive the changes?

Animal diseases, variations and developments - At the time of writing, the situation on animal disease is a continuation of 2024. But Brazil is currently suffering its first commercial case of HPAI, and the trade bans that have resulted... ASF vaccines have not gained commercial support, and Asias industry is exposed to new variants.

Sustainability – the drum beat is quickening, but it is still not a core topic for Asian production, however the global brands are driving its relevance in the region:

Gira follows the impact of sustainability, the increasing legislation and market demands, but what will this mean in Asia? In each country Gira will increasingly challenge our team to consider the impact specifically and look at what the drivers are for change... and how they will play out in the markets. It will not be the same as seen in the western markets of the EU or US, but is increasingly important to investors, and brands in Asia.

South Asia

A complex region with poor data, and significant demand potential, but currently suffering from weak economies and high inflation. A main ara of focus to improve Gira's insights in markets that represent low per capita consumption, but huge potential for market shifts. India is now the biggest country by population, but how does the meat supply chain respond in this highly price sensitive market.

Gira's Meat Newsletter: Launched in mid-2023, it is now a core part of the service

5 editions throughout the year, updating trends in the core regions, and their impact on global markets. This is available to anyone in a GAMC member company or organisation, with the option to be added to the mailing list at any point in the year.

World-class interactive annual meeting on 12th - 13th February 2026 at a venue in Asia (potentially Malaysia). Both the physical meeting and online streaming (live and recorded) allow members to share the insights with more colleagues than ever before. Two days of interactive discussion and networking between Gira's research team, and the GAMC members. Supported by presentations covering key disruptors for the future of the industry and the valuable opportunity to build your network.

Club webinars - selected webinars throughout the year

Between the annual club meetings, Gira updated members on developments around the world in the meat supply chain and how Gira's view on key markets is evolving. Each webinar is approximately one hour, focused on key issues at that point in the year, and the key changes since the last update. Webinars are available as recordings. Recent examples: HPAI Brazil Risk, Covid Impact Analysis, ASF China, HPAI in US Dairy Cattle, Trump's Tariffs...



Key changes to the outlook,
what are the major changes in
the global market



- Email and phone access to Gira personnel
- Providing data clarification and discussion



Picking up on key events and
issues throughout the year



Five editions throughout the
year, updating the key issues
for the global industry



- 9 major country reports
- 5 country profiles
- Including chapters on each of the 3 species; Beef, Piguemeat, & Poultry
- Selective coverage of Sheepmeat



Two-day meeting, 12th-13th February 2026

Asian City TBC

- Overview of Gira's outlook by species
- Intimate "club" environment
- "Round-table" discussion of key issues
- Key networking opportunities
- Remote access available
- Informal welcome dinner, 11th February 2026
- Networking Dinner, 12th February 2026
- Soft copy of presentations



- Half-day, one-to-one (for species members)
- Tailored to your specific needs
- Client-office or boardroom, briefing
- Client pays travel costs

- Global Synthesis: 5 reports - Total meat overview & drivers at a global level; + 4x species
- Asian Synthesis; 5 x reports *Beef, Piguemeat, Poultry & Sheepmeat + Overview*
- Option: Excel-based Data Dashboard



Key variables & assumptions:

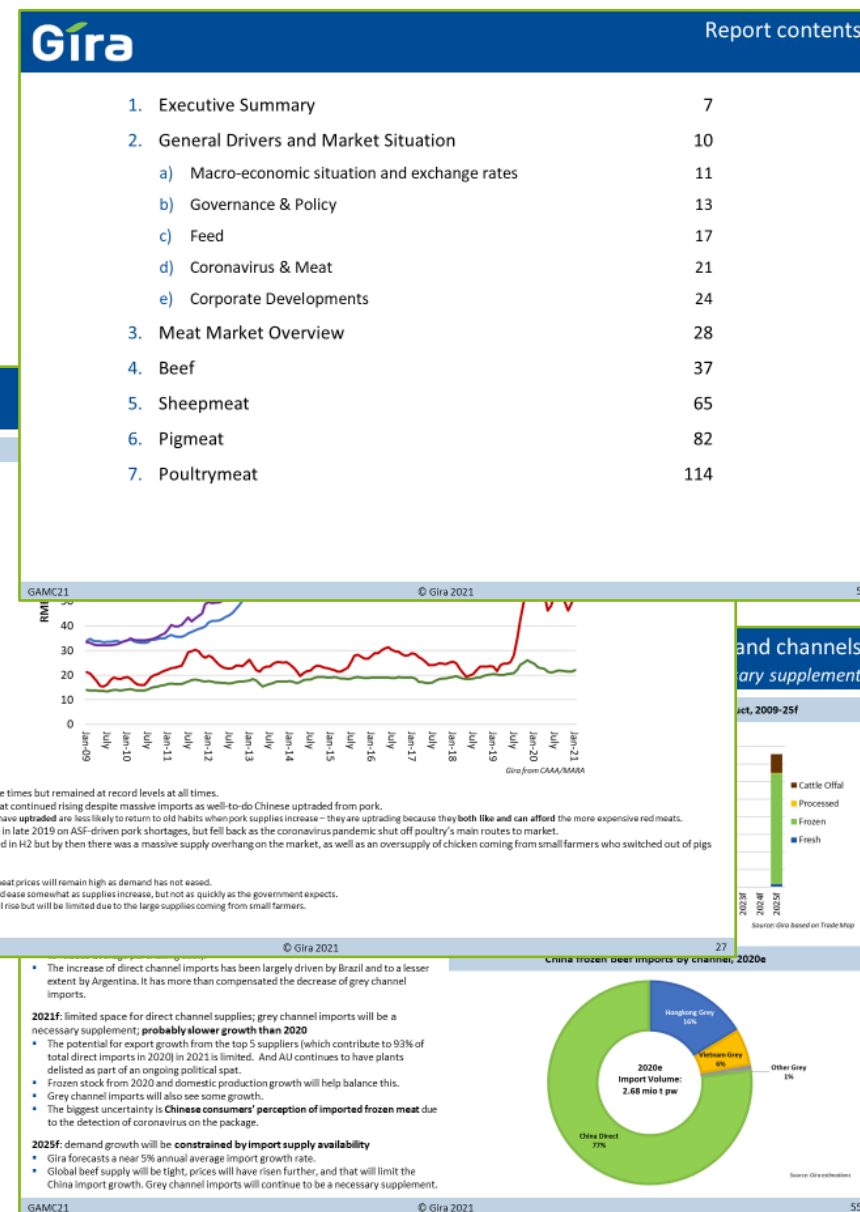
- Socio-economic, political, feed grain cost & availability, and weather impact...
- Major supply and demand side drivers, breaks and disruptors.

Total meat consumption, prices, production and trade

- Meat availability, total consumption in volume and per capita terms.
- Fish consumption – total and per capita.
- Total production & imports/exports, price comparisons.
- Drivers for change.
- Overview of forecasts.

Data per species 2014-2024, 2025e, 2026f, 2030f: per country, across Asia and in a global context

- Herd breakdown: breeding herd, rearing/finishing herd.
 - Farm structure and key developments.
- Production: slaughtering, carcass weight, net production.
 - Processing structure and key corporate developments.
- Consumption.
 - Key market segmentation and distribution channel developments.
- Trade – annual and monthly.
 - Key flows in volume, origin/destination and price.
- Prices.
 - Producer prices, and wholesale/retail where available.



Species Membership

- Two delegates to the 2-day meeting
- **Reports** - Global & Asia synthesis reports and Country reports for the selected species
- **Presentations** - copies of all species-specific and general presentations, including synthesis
- Newsletter - five editions p.a., key global issues
- Email and phone access to Gira personnel
- Price:
 - One species - **USD 19,500**
 - Two species - **USD 24,500**

Options

Full Membership

(all four species)

- Two delegates to the 2-day meeting
- Reports - all synthesis and country reports
- Soft copy of all presentations
- Half-day client-office consultancy
- Newsletter - five editions p.a.
- Email and phone access to Gira

USD 31,500

Country Membership

- Two delegates to the 2-day meeting
- Reports - copy of the full selected country report
- Presentation - copy of the Asia synthesis presentations and selected country presentations
- Newsletter - five editions p.a.
- Email and phone access to Gira

China - USD 15,500

Other countries - POA

Synthesis Membership

- Two delegates to the 2-day meeting
- Reports - copies of Global and Asia synthesis reports
- Presentations - copies of the Global and Asia synthesis presentations
- Newsletter - 5 editions p.a.

USD 13,900

Extras

Extra Delegate to Meeting

+USD 1,500 per seat (max 2 extra)

Excel Dataset - for internal use

+USD 1,500 for Asia Synthesis

Webinar Presentation (30-60 min)

+USD 2,500 delivered as required

Gira Asia Meat Club 2025

Conference Agenda – Ho Chi Minh, Vietnam



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	Falling feed prices, but supply remains tight Developing domestic production, focuses on modern systems Beyond just the Trump effect, war, disease and economics
10:20	<i>Coffee Break - 30 mins</i>	
10:50	Special Topic **How has modern retail evolved post Covid in SE Asia** Feed ingredient dynamics in Asia Asian Lamb Markets Special Topic **Green Feeds - the evolution of an integrated meat business in Vietnam**	Reliant on imports, and global prices Increased import pull as Demand booms
12:30	<i>Lunch - 1 hour in the hotel</i>	

Session 2 - Pigmeat

13:30	Pigmeat Global Overview China Vietnam	Increased competition on global export markets, despite weak EU Consolidation and Trade Wars The global test bed for ASF vaccines, but results seem disappointing?
15:15	Q&A	
15:25	<i>Coffee Break - 30 mins</i>	
15:55	Philippines - Pork and Poultry Interplay Japan Indian Pork Market Asian Pigmeat overview	Import tariff reduction persists, but investment in chicken persists Over view of meat consumer dynamics, changing priorities A distraction or a niche opportunity? Recovering supply, with less Chinese market stress + minor markets
17:30	Finish	
18:30	<i>Networking BBQ Dinner</i>	

Session 3 - Poultrymeat

08:30	Poultrymeat Global Overview Pakistan China Indonesia	Global supply increases after profitable 2024 What potential does the industry have, and how can it achieve it? Development of further processing for export Supply management and government controls
09:50	Q&A	
10:15	<i>Coffee Break - 30 mins</i>	
10:45	Special Topic ** Developments in the Asian Dairy Industry **	
11:10	Thailand Vietnam India Asian Poultrymeat overview	Rising production costs reduce competitiveness at export Rising export potential, but the focus remains the domestic market Consolidation and profitability - where is the industry headed? Rising protein demand favours broiler chicken production
12:30	<i>Lunch - 1 hour in the hotel</i>	

Session 4 - Beef

13:30	Beef Global Overview India China	Can exports and domestic market balance Safeguarding challenge - what will be the out come
14:35	Q&A	
14:50	<i>Coffee Break - 30 mins</i>	
15:20	Special Topic ** Disruption in Asia's Live Cattle Flows** Japan Philippines Asian Beef overview	Production support can't displace imports Has ASF been a driver for beef production, or just imports Globally high prices meet weak but recovering demand
16:35	Concluding comments	
17:00	Finish	

Two days packed with detailed information on the latest issues that continue to impact the livestock and meat markets of Asia.

Supported by insightful discussion between the club members and Gira's team.

Gira Asia Meat Club 2025

Conference Agenda – Ho Chi Minh, Vietnam



Thursday 13th February 2025

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

Falling feed prices, but supply remains tight
Developing domestic production, focuses on modern systems
Beyond just the Trump effect, war, disease and economics

10:20 Coffee Break - 30 mins

10:50 Special Topic **How has modern retail evolved post Covid in SE Asia**

Feed ingredient dynamics in Asia
Asian Lamb Markets

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

Special Topic **Green Feeds - the evolution of an integrated meat business in Vietnam**

12:30 Lunch - 1 hour in the hotel

Session 2 - Pigmeat

13:30 Pigmeat Global Overview
China
Vietnam

Increased competition on global export markets, despite weak EU
Consolidation and Trade Wars
The global test bed for ASF vaccines, but results seem disappointing?

15:15 Q&A

15:25 Coffee Break - 30 mins

15:55 Philippines - Pork and Poultry Interplay
Japan
Indian Pork Market
Asian Pigmeat overview

Import tariff reduction persists, but investment in chicken persists
Over view of meat consumer dynamics, changing priorities
A distraction or a niche opportunity?
Recovering supply, with less Chinese market stress + minor markets

17:30 Finish

18:30 Networking BBQ Dinner

Friday 14th February 2025

Session 3 - Poultrymeat

08:30 Poultrymeat Global Overview
Pakistan
China
Indonesia

Global supply increases after profitable 2024
What potential does the industry have, and how can it achieve it?
Development of further processing for export
Supply management and government controls

09:50 Q&A

10:15 Coffee Break - 30 mins

10:45 Special Topic ** Developments in the Asian Dairy Industry **

11:10 Thailand
Vietnam
India
Asian Poultrymeat overview

Rising production costs reduce competitiveness at export
Rising export potential, but the focus remains the domestic market
Consolidation and profitability - where is the industry headed?
Rising protein demand favours broiler chicken production

12:30 Lunch - 1 hour in the hotel

Session 4 - Beef

13:30 Beef Global Overview
India
China

Restructuring of slaughter - how much more buffalo is available
Safeguarding challenge - what will be the out come

14:35 Q&A

14:50 Coffee Break - 30 mins

15:20 Special Topic ** Disruption in Asia's Live Cattle Flows**

Japan
Philippines
Asian Beef overview

Production support can't displace imports
Has ASF been a driver for beef production, or just imports
Globally high prices meet weak but recovering demand

16:35 Concluding comments

17:00 Finish

Two days packed with detailed information on the latest issues that continue to impact the livestock and meat markets of Asia.

Supported by insightful discussion between the club members and Gira's team.

The 2025 Gira Asia Meat Club was launched with a two-day meeting in Ho Chi Minh on 12th - 13th February 2024, with a gathering of delegates representing 20 Club members.

The meeting was also broadcast to members unable to attend. The broadcast has become a part of the GAMC service and will continue in future editions.

2025 HIGHLIGHTS

In addition to the country and species reports the 2025 Gira Asia Meat Club also included special reports on:

- Inflationary impact on demand
- Forecast Disruptors
- Disruption in Asian Live Cattle Flows
- The Challenges of Pakistan's Poultry Sector
- The recovery of modern retail in Asia post-Covid
- The evolution from feed to meat of a Vietnamese Integrator
- Asian lamb markets

2025 MEMBERS

- | | |
|----------------------|------------------------------|
| ▪ AHDB | ▪ IFC – World Bank |
| ▪ Aviagen Inc | ▪ INAC (Uruguay) |
| ▪ Bord Bia | ▪ JBS Foods |
| ▪ BRF | ▪ Meat & Livestock Australia |
| ▪ CPF | ▪ National Pork Board (US) |
| ▪ DSM | ▪ Sealed Air |
| ▪ Green Feed Vietnam | ▪ VLAM (Belgian Meat Office) |
| ▪ Hopwise (China) | |



Gira is a Geneva-based group with over 50 years' experience in the meat sector. It has a reputation for high quality, objective and neutral analyses throughout the food chain:

- Specialist in food market and chain dynamics - especially in meat and livestock.
- Good client-relations with a wide range of 'blue chip' food companies.
- Gira's Global Meat Club is now in its 50th Year.

Global coverage for the meat & dairy sectors: with selective detail in strategy and marketing analysis, and of other sectors of the food market.

- Gira's meat team is uniquely positioned to assemble a global analysis of key events.

Gira is highly cost effective:

- Very experienced staffing network with unique geographic, sectoral, and process skill mix.

Gira is flexible, with two main 'streams' of client service:

- **Published research** (uniquely detailed) on key current topics, with costs shared by a 'syndicate' of clients.
 - Annual Meat and Dairy Clubs – provide a significant foundation of global information and insight.
 - Selective studies on key issues effecting the meat industry today – some of these are one offs, whilst others are repeated periodically.
- **Management consultancy** (specific to, and sensitive to, client needs) with sector focus on food & agribusiness. Including, but not limited to:
 - Corporate strategy and company development.
 - Due Diligence.
 - Market appraisals, and access studies.
 - Customer-need audits.
 - Competitor benchmarking.

To find out more and keep up to date, visit www.girafood.com or follow our [Gira LinkedIn page](#)



Should you any further information please contact:

Rupert Claxton:
rclaxton@girafood.com
+44 1323870137

