



Gira Asia Meat Club – 2025

13th Edition

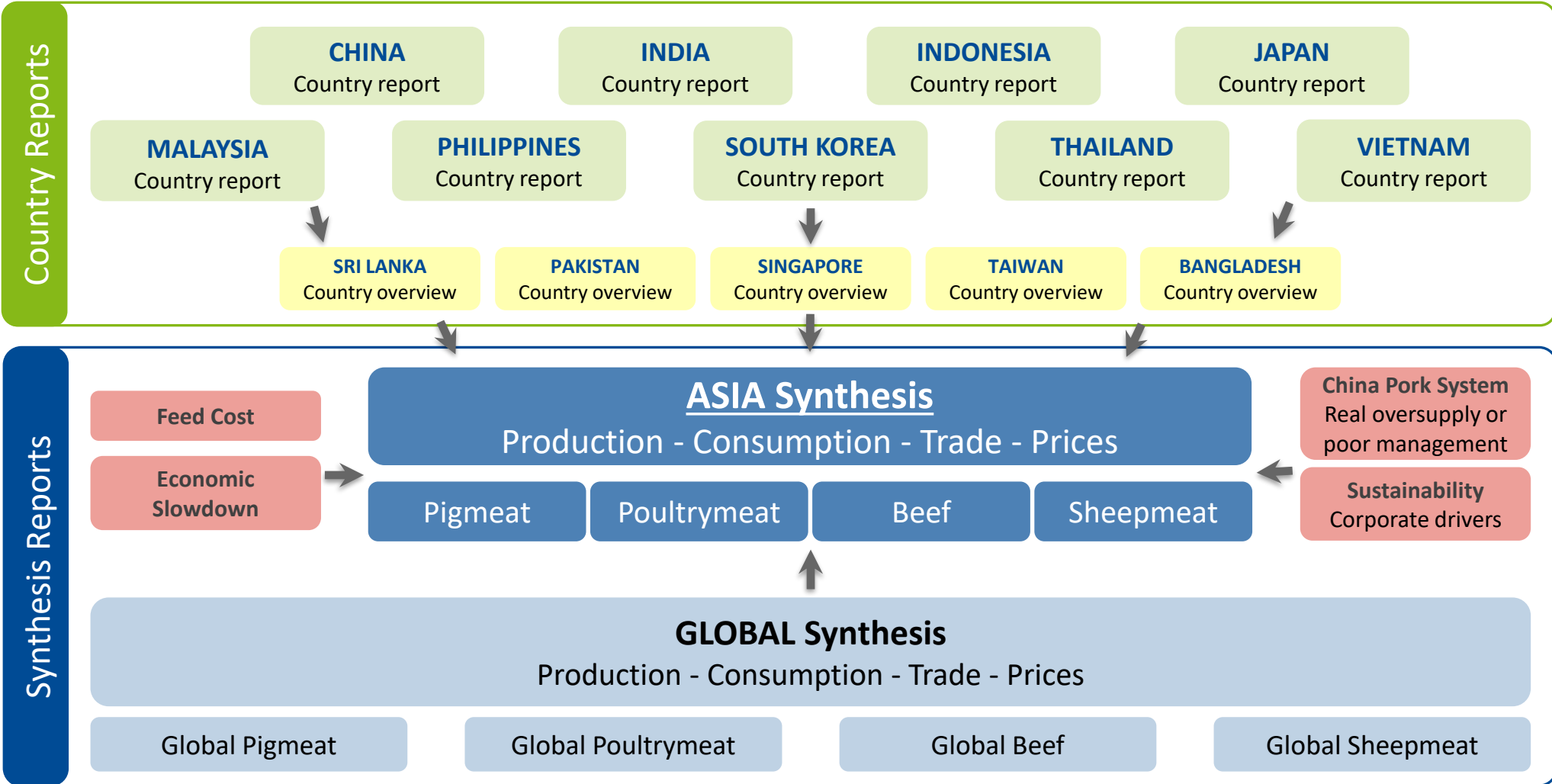
13th - 14th February 2025: Ho Chi Minh City, Vietnam
New features, summary of service, structure and fees

Proposal – May 2024

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Market Insights, Data and Forecasts by Species and Country:

Pork - Poultry - Beef - Sheepmeat



DATA (for 2013-2023, 2024e, 2025f, 2029f)

2029 outlook... supported by data forecasts and explanation

5-year outlook as the Asian markets develop from the economic drag that currently effects much of the region, and investors look for new potential. How does demand pick up from the currently weak situation? Is the modernising supply chain a key driver, or a challenge?

Animal diseases, variations and developments - At the time of writing, the situation on animal disease is a continuation of 2024. But changes to the status quo are an ongoing risk: new variants, vaccines, changing management, changing regulation, trade impacts, and the impact on global trade with new geographies.

Sustainability - not yet a core dynamic in Asia, but where will it be in 5 years' time:

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. Can demand recover, and how will it drive the evolution of meat production?

Five editions of Gira's Meat Newsletter: New since mid-2023

This newsletter is offered in response to a need for more regular updates on the big events in the global markets. Five editions throughout the year, with a focus on the major global producers, covering production, price and trade. It also picks up key events in global markets.

World-class interactive annual meeting on 13th - 14th February 2025 at a venue in Ho Chi Minh City. 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, 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...



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



Two-day meeting, 13th-14th February 2025

Ho Chi Minh City, Vietnam

- 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, 12th February 2025
- Gala Dinner, 13th February 2025
- Soft copy of presentations



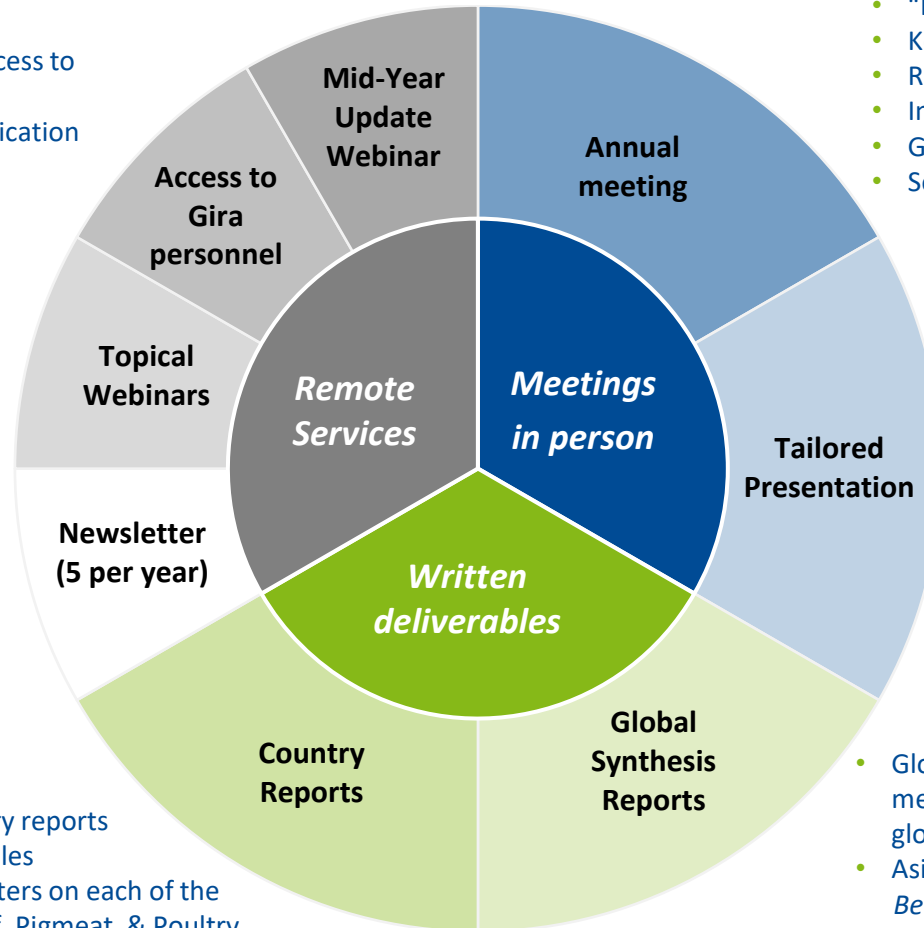
- Email and phone access to Gira personnel
- Providing data clarification and discussion



Picking up on key events and issues throughout the year



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



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



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



- Global Synthesis: 5 reports - Total meat overview & drivers at a global level; + 4x species
- Asian Synthesis; 5 x reports *Beef, Pigmeat, 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.

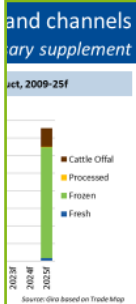
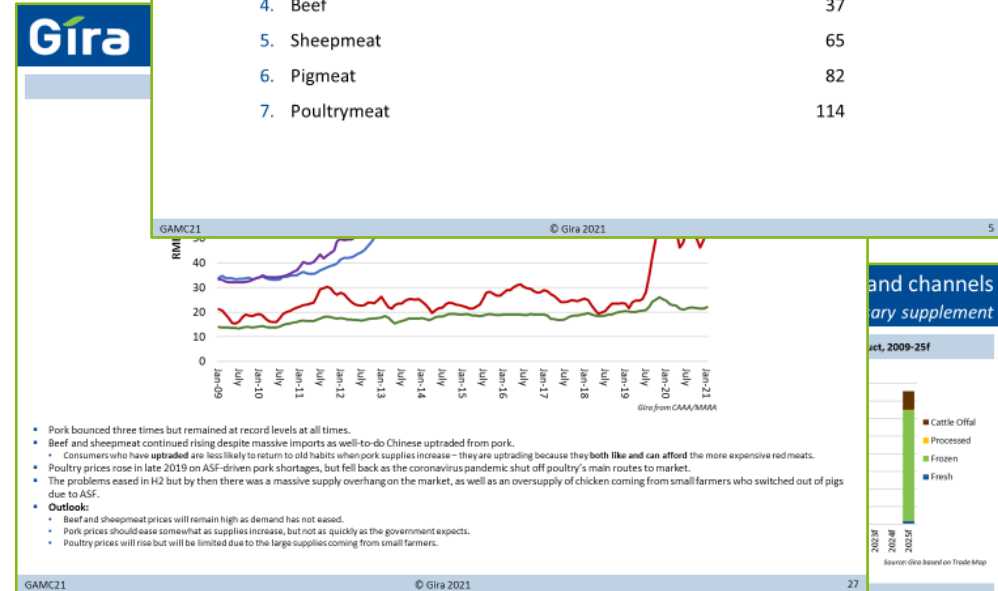
Total meat consumption, prices, production and trade

- 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 2013-2023, 2024e, 2025f, 2029f: 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.

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- Pork bounced three times but remained at record levels at all times.
- Beef and sheepmeat continued rising despite massive imports as well-to-do Chinese uprated from pork.
 - Consumers who have uprated are less likely to return to old habits when pork supplies increase – they are uprating because they both like and can afford the more expensive red meats.
- Poultry prices rose in late 2019 on ASF-driven pork shortages, but fell back as the coronavirus pandemic shut off poultry's main routes to market.
- The problems eased in H2 but by then there was a massive supply overhang on the market, as well as an oversupply of chicken coming from small farmers who switched out of pigs due to ASF.
- Outlook:
 - Beef and sheepmeat prices will remain high as demand has not eased.
 - Pork prices should ease somewhat as supplies increase, but not as quickly as the government expects.
 - Poultry prices will rise but will be limited due to the large supplies coming from small farmers.

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 19,100**
 - Two species - **USD 24,000**

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 30,700

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 13,500

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 2024

Conference Agenda - Manila, Philippines



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**
- 10:30 Coffee Break - 30 mins**
- 11:00 Feed ingredient dynamics in Asia**
 Asian Lamb Markets
Special Topic **Sustainability - Asian Interpretation and Implementation**
- 12:30 Lunch - 1 hour in the hotel**

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

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

Session 2 - Pigmeat

- 13:30 Pigmeat Global Overview**
 Japan
 South Korea
 China - Huge overcapacity at farm level
- 15:15 Q&A**
- 15:30 Coffee Break - 30 mins**
- 16:00 Thailand**
 Vietnam
 Philippines
 Asian Pigmeat overview
Special Topic **Implementation of Animal Vaccines - distraction or booster**
- 17:30 Finish**
- 18:30 Networking BBQ Dinner**

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

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

Session 3 - Poultrymeat

- 08:30 Poultrymeat Global Overview**
 Philippines
 Japan
Special Topic ** Brazilian HPAI - Year One Lessons **
 China
- 09:50 Q&A**
- 10:20 Coffee Break - 30 mins**
- 10:50 Special Topic ** Malaysian HPAI and 2022 crisis: can the industry restructure? ****
- 11:10 Thailand**
 Vietnam
 Indonesia
 India
 Asian Poultrymeat overview
- 12:30 Lunch - 1 hour in the hotel**

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

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

Session 4 - Beef

- 13:30 Beef Global Overview**
 India
 China
- 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
- 16:35 Concluding comments**
- 17:00 Finish**

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

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

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 2024 Gira Asia Meat Club was launched with a two-day meeting in Manila on 15th - 16th February 2024, with a gathering of delegates representing 13 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.

2024 HIGHLIGHTS

In addition to the country and species reports the 2024 Gira Asia Meat Club also included special reports on:

- Inflationary impact on demand
- Forecast Disruptors
- Weak Chinese economy and meat demand
- Sustainability in the Asian context
- Developing role of vaccination in meat supply
- Philippines market and consumer dynamics
- The role of sheepmeat in the region

2024 MEMBERS

- AHDB
- Aviagen Inc
- Australian Pork
- Bord Bia
- Bounty
- BRF
- CPF
- DSM
- JBS Foods
- Meat & Livestock Australia
- National Pork Board (US)
- Sealed Air
- VLAM (Belgian Meat Office)



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 49th 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](#)



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