



Invitation to the
Gira Meat Club – 2022/23
- World Meat Market Outlook -

47th Annual Edition

Geneva: 6th - 7th December 2022

Summary of the service, structure and fees

July 2022

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

- Picking up on key events and issues throughout the year

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

- Key events: global market
- Total meat overview & drivers
- 4 x species reports *Beef, Pigmeat, Poultry & Sheepmeat*
- Option: Excel-based Data Dashboard



Two-day meeting, 6th-7th December 2022 Crowne Plaza (near Geneva)

- 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, 5th December 2022
- Gala Dinner, 6th Dec 2022
- Soft copy of presentations



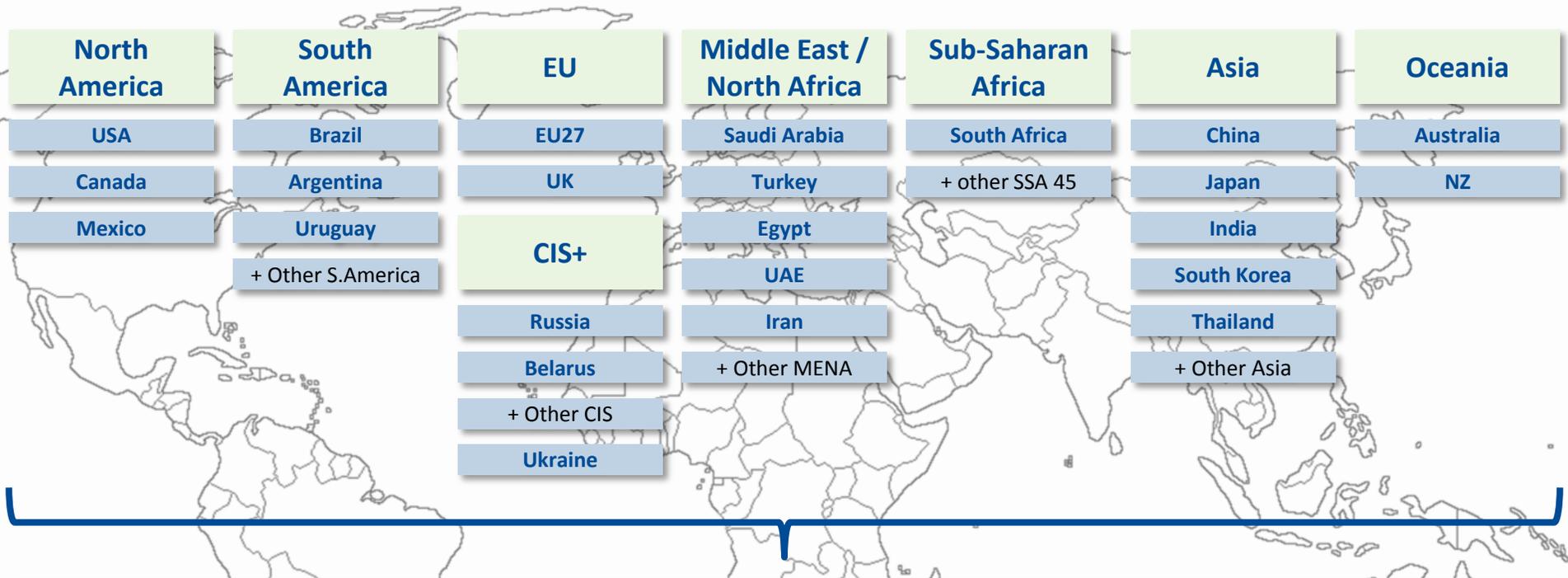
- Half-day, one-to-one (for species members)
- Tailored to your specific needs
- Client-office or boardroom, briefing
- Client pays travel costs



- For key countries in 8 main regions
- Including chapters on each of the 4 species; Beef, Pigmeat, Poultry & Sheepmeat

REGIONAL MARKET INSIGHTS, DATA & FORECASTS BY SPECIES

Drivers & brakes – Total Meat – Pigmeat – Poultry – Beef – Sheepmeat



GLOBAL SYNTHESIS

Socio-economics – **Production** – **Consumption** – **Trade** – **Prices** – Industrial developments

Total Meat - Global Pigmeat - Global Poultry - Global Beef - Global Sheepmeat

Global coverage;

resources focused on the key regions & species

Global Synthesis Reports

Reviewing global meat trading environment:

- 1 x General Report:
 - Global totals & comparison of key data by species, and region.
 - Key Assumptions and Drivers.
- 4 x Species Reports:
 - Pigmeat, Poultry, Beef and Sheep/goatmeat.
- Comparative data and focused analysis of main drivers.

Country Reports

Detailed, justifying forecasts with objective data and robust analysis:

- Depth of coverage is flexed to reflect the relative importance of the species and the country
 - Report length adjusted accordingly
 - Data combined with the explanation as to why and how
- Each country report is organised into the following chapters:
 - 1) **Executive summary** - the headlines
 - 2) **General Drivers and Market Situation** - economics, feed, and other...
 - 3) **Meat Market Overview** - Comparison of key data between species
 - 4) **Beef** - data & analysis
 - 5) **Sheep and Goatmeat** - data & analysis
 - 6) **Pigmeat** - data & analysis
 - 7) **Poultrymeat** - data & analysis
- Country Briefs are produced where only 'light cover' is required.

| Region | Country | Balance tables | | | | Reports | | | |
|---------------|-------------------------|----------------|----|----|----|---------|----|----|----|
| | | Bf | Sh | Pk | Py | Bf | Sh | Pk | Py |
| North America | CA | x | o | x | x | x | | x | o |
| | US | x | x | x | x | x | o | x | x |
| | MX | x | o | x | x | x | o | x | x |
| South America | AR | x | x | x | x | x | o | o | x |
| | BR | x | x | x | x | x | o | x | x |
| | UY | x | x | x | x | x | o | o | o |
| | Other S.Am ¹ | x | | x | x | x | | x | x |
| Europe | EU27 | x | x | x | x | x | x | x | x |
| | UK | x | x | x | x | x | x | x | x |
| CIS/UA | RU | x | x | x | x | x | o | x | x |
| | UA | x | o | x | x | x | o | x | x |
| | BY | x | o | x | x | o | o | o | o |
| | Other CIS ² | o | o | o | o | x | o | o | x |
| MENA | MENA 20 ³ | x | x | o | x | x | x | | x |
| | AE | x | x | o | x | o | o | | o |
| | EG | x | x | o | x | o | o | | o |
| | IR | x | x | o | x | o | o | | o |
| | SA | x | x | o | x | o | o | | o |
| | TR | x | x | o | x | o | o | | o |
| SSA | SSA 46 ⁴ | o | o | o | o | o | o | o | o |
| | ZA | x | x | x | x | x | x | x | x |
| Asia | CN | x | x | x | x | x | x | x | x |
| | IN | x | x | x | x | x | o | o | x |
| | JP | x | x | x | x | x | o | x | x |
| | KR | x | x | x | x | x | o | x | x |
| | TH | x | o | x | x | o | | o | x |
| | Other Asia ⁵ | x | o | x | x | x | o | x | x |
| Oceania | AU | x | x | x | x | x | x | o | o |
| | NZ | x | x | x | x | x | x | o | o |

x = Detailed Balance Tables

o = Simplified Balance Table

X = Detailed Reports

o = Overview Reports

No report

¹ Other South America - total figures + select detail for: CL, CO, PE, PY, VZ
² Other CIS - total figures + select detail for: AM, AZ, KZ, KG, MD, TJ, TM, UZ
³ MENA20 - key numbers on all 20 countries in the region
⁴ SSA 46 - total figures + select detail per country for Sub Saharan Africa
⁵ Other Asia - total figures + select detail for: ID, PH, TW, VN

Executive summary - the headlines, to hand, explained.

General Drivers and Market Situation: Key variables & assumptions

- Socio economic, political, feed grain cost & availability, and weather impact
- Inflation, war, labour... the factors that are shaping 2022

Meat Market Overview: How does the evolution and outlook of the species compare to each other

- Totals for meat consumption, production and trade. Price comparisons
- With fish production and consumption data added for context

The 4 key species chapters: Data + explanation by species 2012 - 22e, 2023f, 2027f: per country, per species, in a global context

- The “Balance Table” - the key numbers in one place so that the evolution can be compared.

- Herd / Flock breakdown: breeding herd, rearing/finishing herd
 - Farm structure and key developments

- Production: slaughtering, carcass weight, net production (and GIP)
 - Processing structure and key corporate developments

- Trade: both meat and livestock
 - Key flows in volume, origin/destination and price, including estimations of Grey Trade

- Consumption: total and per capita
 - Key drivers and challenges

- Prices
 - Producer prices, wholesale/retail where available, and trade

Brazilian pig slaughtering
Chinese ASF gives industry boost; challenge through the mid-term

Monthly slaughter numbers, 2016-20

Brazilian pig slaughtering and offtake rate, 2009-2025f

2021 is expected to be another positive year for the Brazilian pork industry:

- Slaughterings are forecast to increase again; Gira is forecasting growth of 3.8%.
- A continued surge in export volumes is expected with China the major driver of this.
 - This will be a key factor encouraging producers.
 - Processors with access to the market will also be looking to significantly increase production to leverage the higher prices attainable in the market.
- Pork producer prices in Brazil are expected to remain buoyant as a result.
- Feed costs are expected to remain relatively high but stable in 2021, supporting profitability for producers.

Most will view China as a short- to mid-term opportunity and will therefore not look to invest significantly at a farm level; whilst exceptions to rule will exist, this should act to limit the downside when Chinese buying slows.

- Investment at a farm level is however expected, driving slaughter volumes up progressively in Brazil, but importantly driving efficiency gains through the value chain.
- Slaughter growth will therefore sit below the expected production gains thanks to these efficiency gains.

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Brazilian beef export destinations & prices
Chinese price surge starting to abate with transition from sellers to buyers market

Exports to China as a share of production, 2009-2025f

Monthly frozen boneless beef export prices, 2017-20 M10

A key for the mid-term will be the likely strengthening of the currency which will erode the current competitive standpoint; exporters will need to identify other ways to attain and grow market access.

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Sample pages from the 2020 GMC Brazil Country Report

SPECIES MEMBER Subscription

- Country reports on the chosen specie(s)
 - Data and insight on the main metrics for that specie
 - Headline coverage on the “other” species
- Synthesis reports: Global overview + selected Specie(s)
- Attendance to the Annual 2-day club meeting:
 - Attendance for 2 delegates
 - Copy of all presentations
 - Streaming of recordings of all key presentations
- Half day client presentation (tailored)
- Mid-year selective global update
- Webinar updates on key developments
- 2 species - EUR 34,500
- 1 species - EUR 25,000

Other Membership Subscriptions

FULL MEMBERSHIP Subscription

- Detailed reports: 8 Regions of Country Reports (all species) + 5 Global Synthesis Reports (Overview + 4x Species) (PDF)
- 2-3 delegates to the 2-day Annual Meeting
- Copies of all presentations & forecasts
- Half day client presentation (tailored)
- Mid-year selective global update (webinar)
- Webinar updates on key developments
- EUR 42,000

REGION MEMBER Subscription

- Global general synthesis report and selected regional country reports
- 2 delegates to the 2-day Annual Meeting
- Copy of the synthesis presentations and selected region presentations
- Mid-year selective global update
- Webinar updates on key developments
- EU region - EUR 25,000
- Other regions POA

SYNTHESIS MEMBER Subscription

- Global Synthesis Reports (Global + All Species)
- 2 delegates to the 2-day Annual Meeting
- Copy of all the presentations
- Mid-year selective global update
- EUR 20,000

Annual Meeting – Only:

- EUR 14,200 - with copies of presentations
- EUR 9,900 - attendance-only

Extras

Excel Dataset + Dashboard

- The key numbers from all the countries
- EUR 2,500

Extra Delegate to the Annual Meeting

- Maximum of 2 extra per member
- EUR 1,500 each

Extra Webinar Presentations

- Delivered remotely - options available.
- EUR 2,500

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- ✓ AHDB (UK)
 - ✓ ALIC (Japan)
 - ✓ Aviagen (Int'l)
 - ✓ BRF (BR)
 - ✓ Canadian Cattlemen's Association
 - ✓ Canada Pork International
 - ✓ Cargill Meat Solutions (US)
 - ✓ COV – Dutch Meat Industry Association
 - ✓ DSM Nutritional Products (CH)
 - ✓ European Commission (EU)
 - ✓ FECIC (Spanish Meat Processor Assoc)
 - ✓ Fedegan (Co)
 - ✓ Fulton Marketing Group (US)
 - ✓ Handtmann (DE)
 - ✓ IFC – World Bank Group (Int'l)
 - ✓ Irish Food Board (Bord Bia)
 - ✓ JBS
 - ✓ Livestock & Meat Comm'n Northern Ireland
 - ✓ Landbrug & Fødevarer (Danish Meat Assoc'n)
 - ✓ Meat Industry Association New Zealand
 - ✓ Meat & Livestock Australia
 - ✓ Multivac – TVI (Int'l)
 - ✓ National Pork Board (US)
 - ✓ Sealed Air - Cryovac
 - ✓ Uruguayan National Meat Institute
 - ✓ UNIC (Italian Tanneries Association)
 - ✓ VLAM - Belgian Meat Office

Client feedback

"Unique opportunity to get the big-picture ... and the detail ... worldwide"

"I received excellent feedback from colleagues - Triple AAA"

"Great opportunity to discuss detail with Gira experts"

"Data and insight used for wide range of corporate needs"

Gira is an international research & consultancy firm with over 50 years experience. With an established reputation for high quality, objective and neutral analyses on the food sector:

- Specialist in food market and supply chain dynamics - especially in meat and livestock.
- Strong client-relations with numerous 'blue chip' food companies.
- Global coverage for the meat & dairy sectors: with selective detail in strategy and marketing analysis, and of other sectors of the food market.

Gira is highly cost effective:

- Experienced staff network with unique geographic, sectoral, and process skill mix, who work year-round in the sector.
- Significant global network of contacts, providing up to date insight on key issues in the market.
- Long term experience of key events, and how the various modules of the industry interact and evolve.

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

- Published research** - Uniquely detailed, on key current topics, with costs shared by a 'syndicate' of clients.
- Management & strategy consultancy** - Specific to, and sensitive to, client needs. Specialised sector focus on food & agribusiness. Highly confidential to the client.
- Conference speakers** - from board meetings and think tanks to industry gatherings, Gira's team are regular speakers around the world. Providing core insights into a constantly changing environment.

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