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Join the Conversation *#MBW19*

**Quick links to social channels at *www.meatbusinesswomen.org*
*@meatwomen***



Go to: slido.com

Event code: #Meat2019

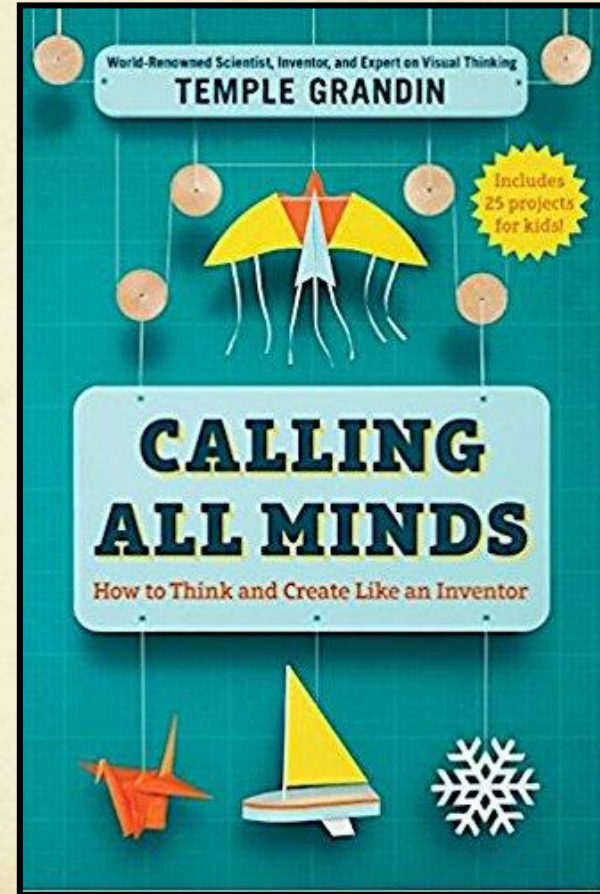
Today's Agenda

- **Welcome: Laura Ryan** (Chair of Meat Business Women)
- **Temple Grandin** (American Professor of Animal Science) Thinking in Pictures
- **Ursula Lavery** (Technical and R&D Director Europe, Moy Park), Making a Global Impact
- **Teresa Exelby** (People Director, Morrisons Manufacturing), Working with Purpose
- **Phil Hadley** (International Development Director, AHDB) Trading Across the World
- **Panel Q&A**
- **12.30 – 13.30: Lunch**
- **Sophie Devonshire** (CEO The Caffeine Partnership & Lead at Speed author), How to Lead at Speed
- **Mel Wombwell & Kylie Roberts** (SHIFT unlimited), Mentoring in Action
- **Christine Middlemiss** (Chief Veterinary Officer), The Future of Our Industry
- **Close: Emma Hallam** (Meat Business Women committee member)

Calling All Minds, 2nd Edition

**Temple Grandin,
Professor of
Animal Science
Colorado State
University**

See: www.Grandin.com





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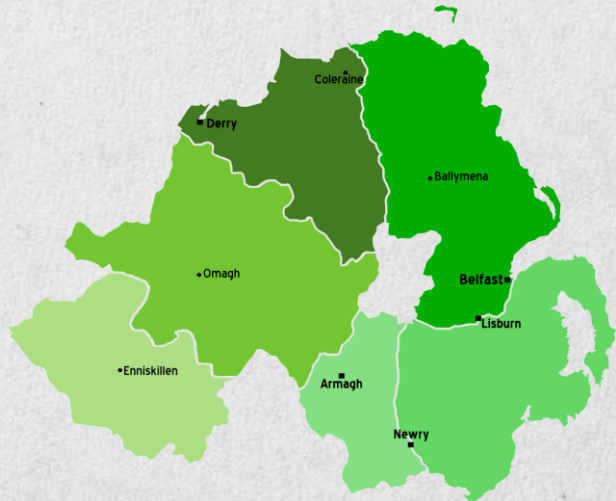
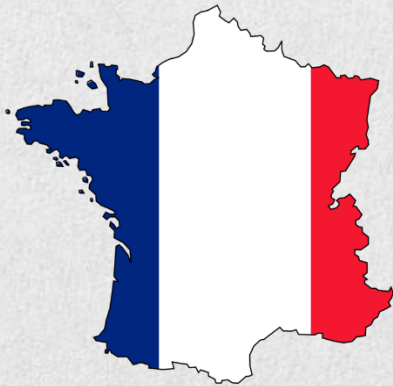
FOOD FOR GOOD

URSULA LAVERY

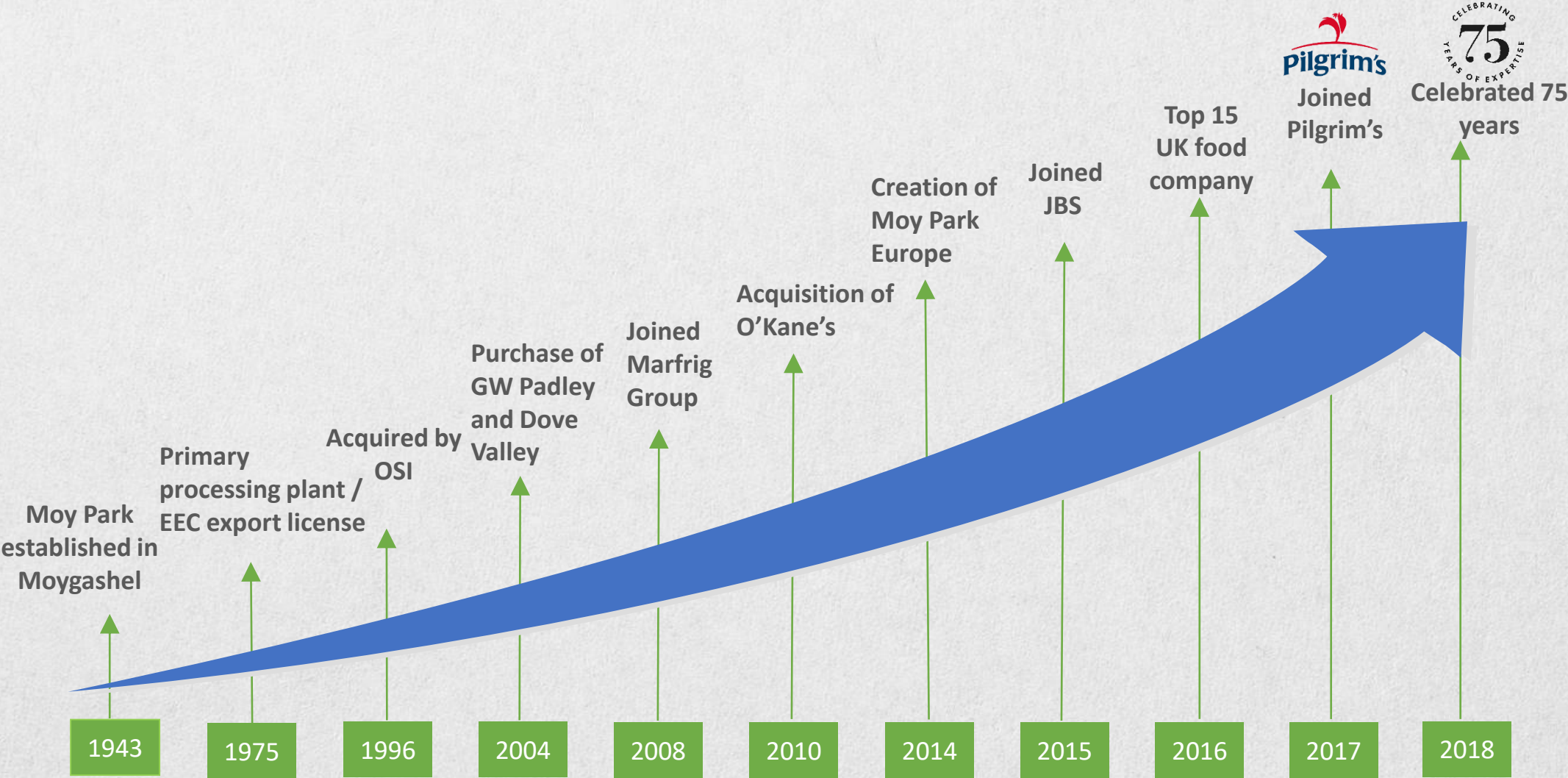
TECHNICAL AND R&D DIRECTOR EUROPE

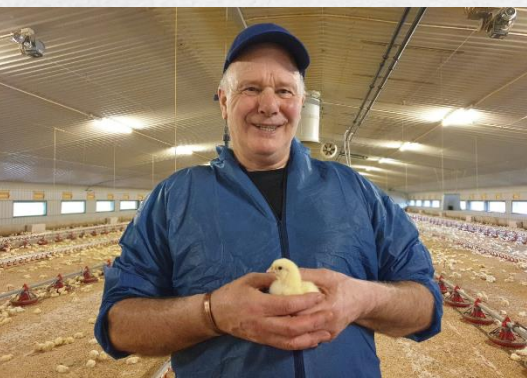


CAREER



THE MOY PARK JOURNEY





MOY PARK BUSINESS OVERVIEW



- Top 15 UK food business
- Largest company in Northern Ireland
- More than 13,000 employees
- £1.6 billion turnover
- c.30% market share UK fresh poultry
- Footprint in UK, France & Netherlands
 - 4 primary processing plants
 - 8 further processing plants
 - 3 feed plants
 - 6 hatcheries
 - c.800 poultry farms



OUR PRODUCTS



- *Comprehensive product offering centred on poultry, convenience and meat free products*
- *Leading UK & European retail, Foodservice and QSR customers*

Primary fresh and fresh added-value



Ready-to-eat



Coated



Multi-protein & meat free



COLLABORATIVE RELATIONSHIPS

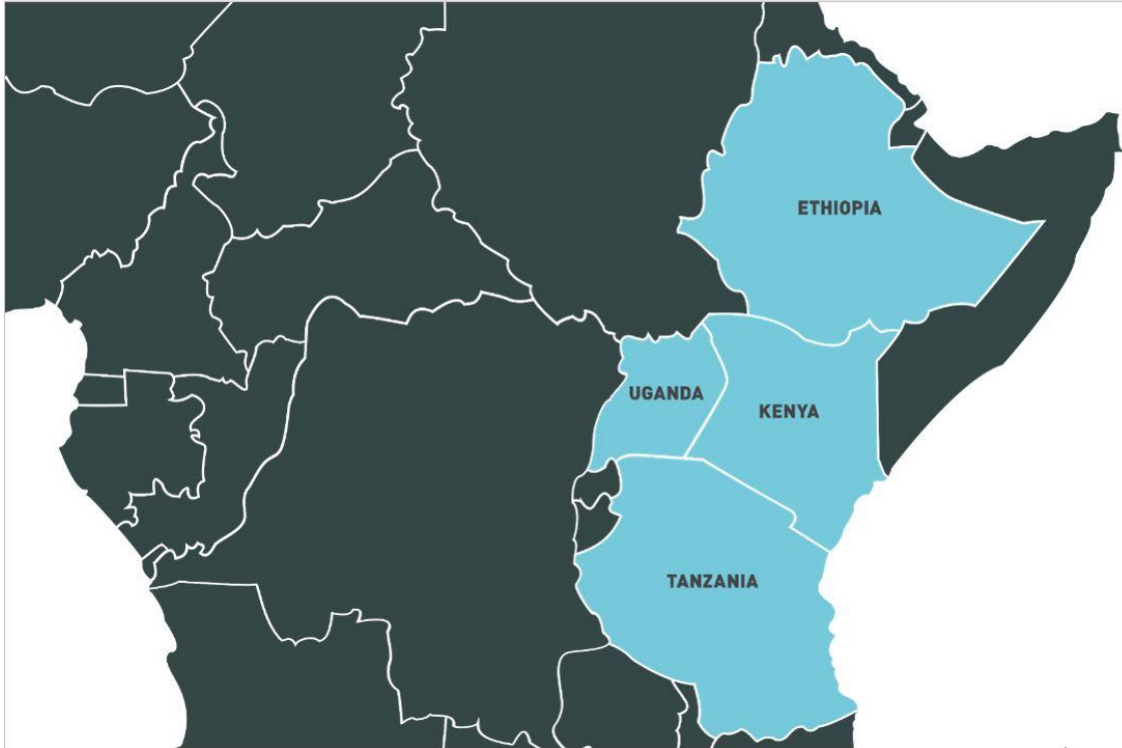




MOY PARK & FARM AFRICA
3 YEARS IN PARTNERSHIP

 **FARM AFRICA**

AGRICULTURE IS THE BACKBONE OF AFRICA



AGRICULTURE

Developing agricultural expertise for long-term change.



ENVIRONMENT

Safeguarding the environment for years to come.



BUSINESS

Boosting business to drive prosperity.

MOY PARK & FARM AFRICA IN PARTNERSHIP HIGHLIGHTS



MOY PARK & FARM AFRICA IN PARTNERSHIP RESULTS



Target: £100,000

Raised: £150,328.25



BIG BEEHIVE BUILD

TANZANIA, 2017



3 DAYS,
14 WOMEN,
120
BEEHIVES TO
BUILD



GETTING STARTED.....



LUNCH IS READY.....



THE FINISHED BEEHIVES... PLACING THEM IN THE WOODS



EERI THE WELCOMING COMMITTEE





“POVERTY IS THE MAIN DRIVER OF DEFORESTATION. THIS CHALLENGE KICK-STARTS NEW HONEY BUSINESSES FOR THE EERI COMMUNITY, TEACHING THEM HOW TO MAKE MONEY THROUGH FOREST-FRIENDLY BUSINESSES. ”







“EMPOWERING WOMEN FARMERS HELPS BUILD BETTER LIVES FOR THEIR CHILDREN AND LOCAL COMMUNITY, BUT IT ALSO MAKES A VALUABLE CONTRIBUTION TO DEVELOPING A STRONGER, MORE SUSTAINABLE ECONOMY FOR THE COUNTRY.”

“THE LADIES WE MET IN BERMI VILLAGE WERE WELCOMING, KIND, RESOURCEFUL AND VERY KEEN TO LEARN. WE WERE HONoured TO SPEND TIME WITH THEM.”





THANK YOU





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Working with Purpose

Teresa Exelby
People Director

Why?

**To make and provide
food we're all proud of,
where everyone's effort
is worthwhile,
so more and
more people
can afford to enjoy
eating well.**

<https://www.youtube.com/watch?v=xruwuZ91i4Q>

Our Ambitions



- We offer create value for money across the store
- We provide good quality fresh food
- We make fresh food visibly and daily on Market Street
- Our experts on Market Street help and advise
- We have warm and friendly staff who care deeply about service
- You can easily get what you want
- We provide clothing, home, leisure and services to complement our food

- A manager who listens, helps and supports me
- The opportunity to develop, progress and grow
- The tools and training to do my job
- A fair day's pay for a fair day's work
- Very highly valued and treated with respect
- I can have my say on what matters



Our Ambitions



- Buy and sell simply
- Establish lasting relationships
- Always do what we say, build trust
- Focus on quality and new
- Achieve profitable growth

- Focus on the core
- Recover then grow
- Build a stronger balance sheet
- Create shareholder value



Stats



9
Distribution
Centres

101,0041
colleagues



12 million
customers
weekly

491
Stores &
1500
conv

Turnover
£17.7bn (up
2.7%)

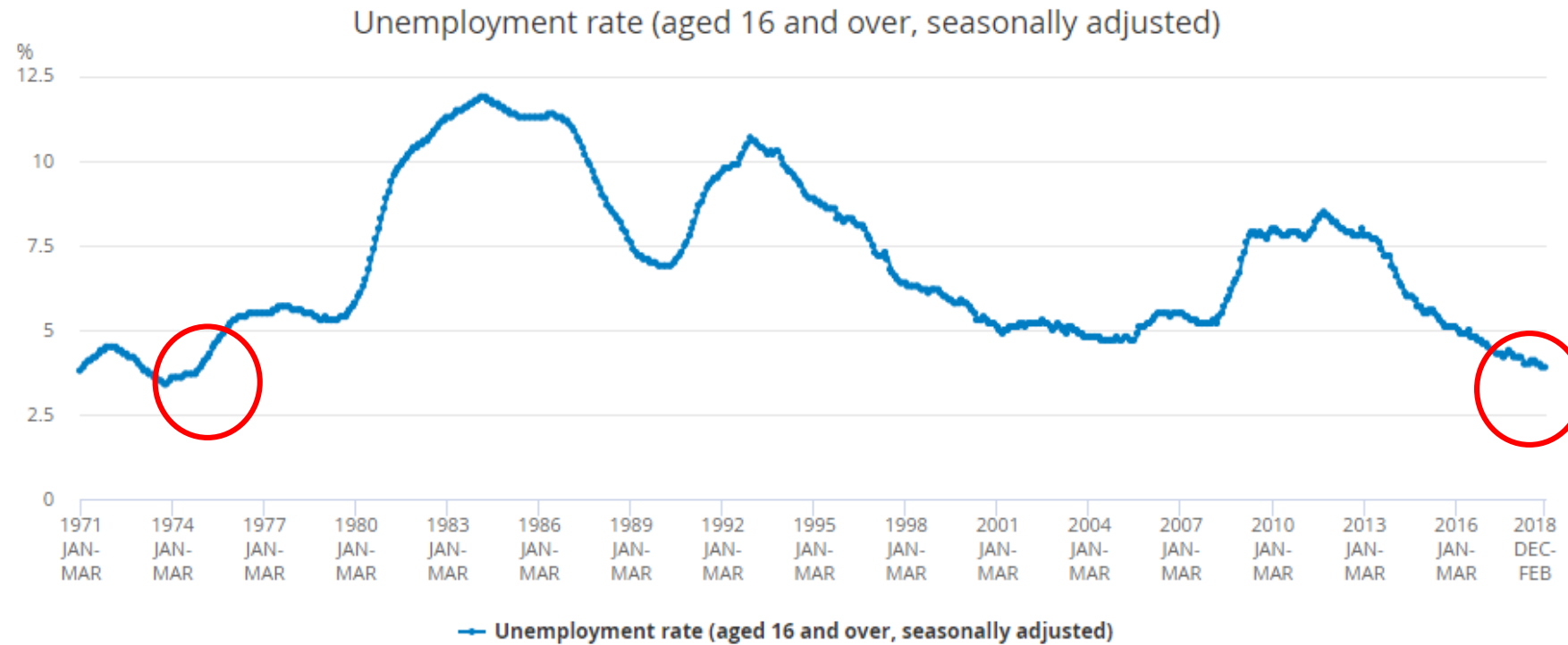
18
Manufacturing
Sites



Profit
£406m
(before tax)

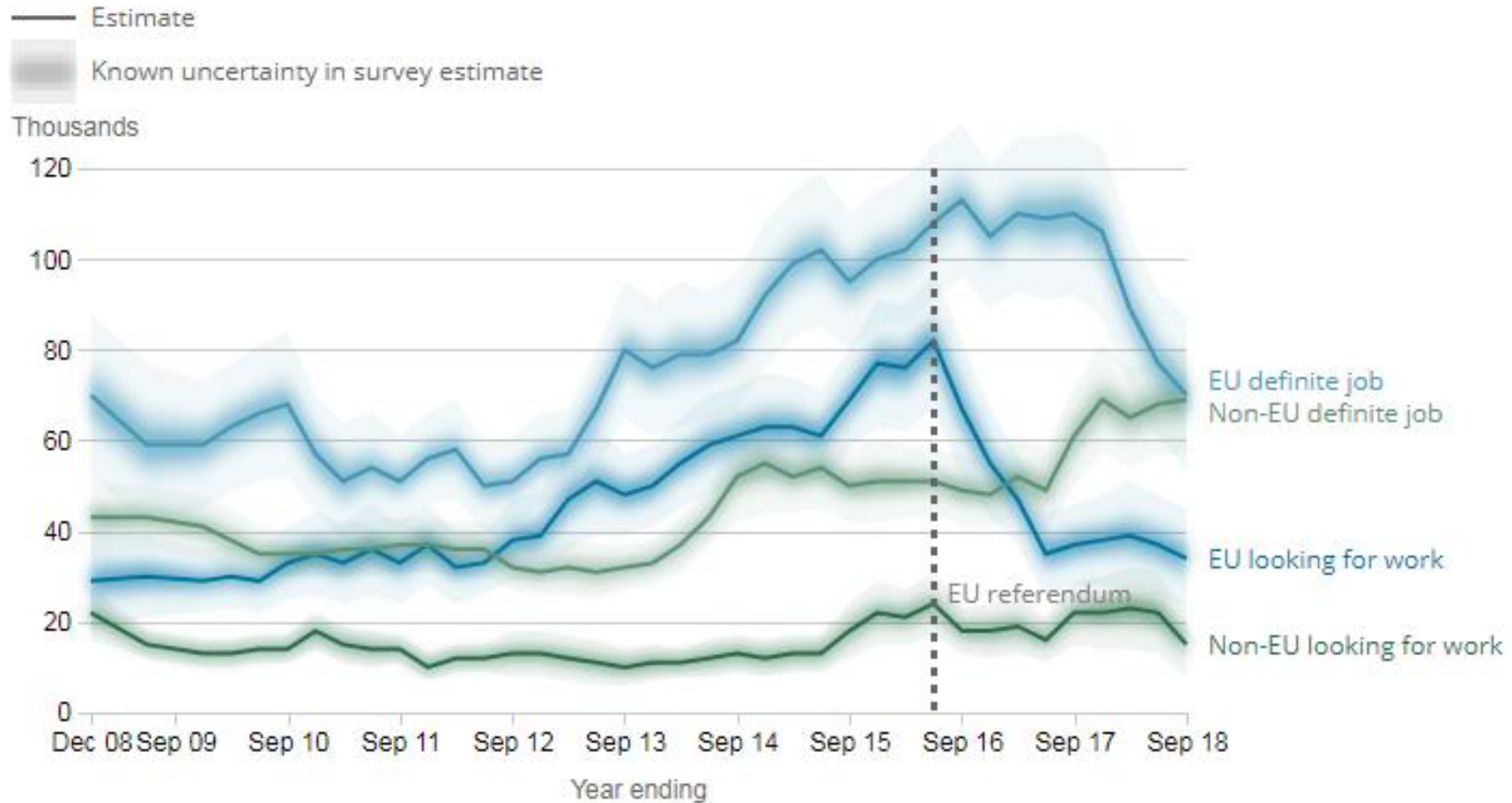
<https://www.youtube.com/watch?v=y4nwoZ02AJM>

Unemployment figures 1975 & 2018



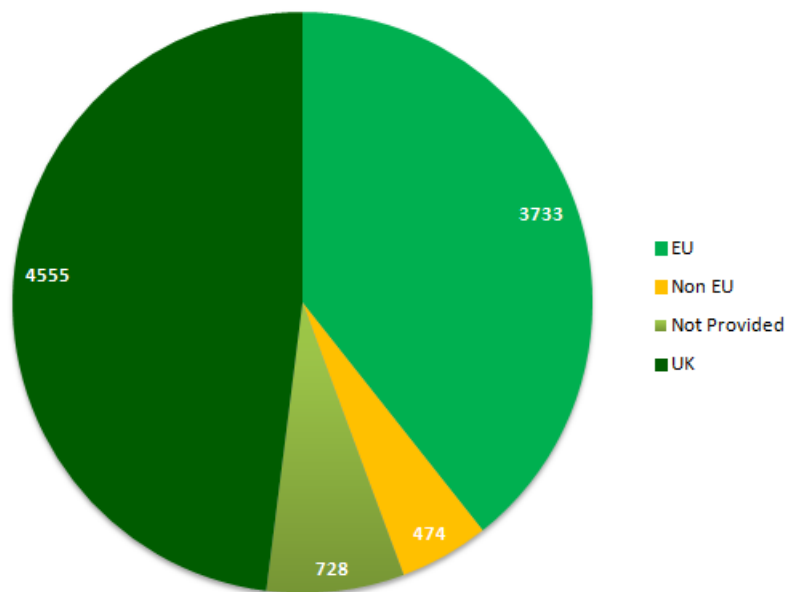
Source:

Migration



Mix of EU and British colleagues

Wm Morrisons - Nationality Headcount



Nationality	Heads
EU	3733
Non EU	747
Not provided	728
UK	4555
Total	9490

Finding my purpose



1988



1998



2018



1995



2005

*“Enabling ordinary people
achieve extraordinary things”*

1. You choose where you set your bar
 2. Find your own truths and get time in perspective
 3. Invest in your friendships
- If you need any more, listen to Baz Luhrmann
.....always wear sunscreen



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Meat Business Women Conference 2019

Trading Across The World

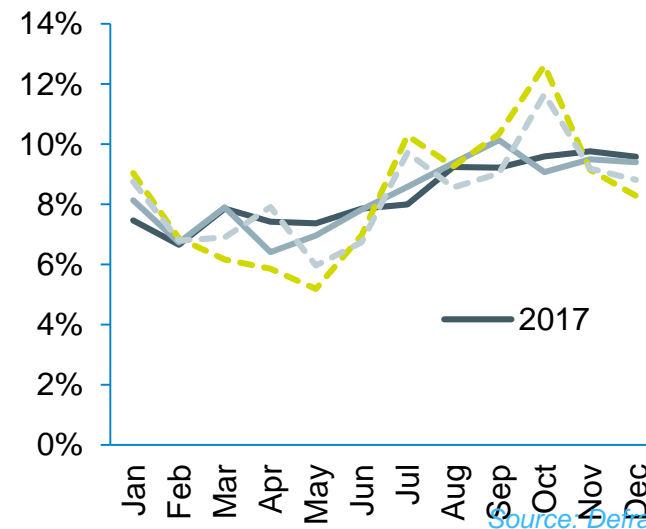
Dr Phil Hadley (International Development Director, AHDB)

Overview

- Why we export
- Role of AHDB export function
- Brexit and the future trading relationship with the EU
- Deal or no deal?
- Role of the International Meat Secretariat (IMS)

Why?

- Adds value to production in high end markets
- Exploit our differences & build reputation (eg: outdoor reared)
- Utilises over supply and address peaks in seasonal production
- Carcass balance for the products not in demand domestically



What we do

- Technical market access, import risk assessment questionnaires, support towards approval, inward inspections, ongoing market maintenance
- Outward missions to new/growing markets eg recent commercial mission to Taiwan immediately post gaining access & attended by 8 companies
- Trade shows to build reputation/presence and provide a platform for exchange with buyers
- In-market presence, activity and intelligence gathering, principally China and HK
- Leverage support from Embassy/FCO/DIT network
- Brussels office on EU policy and impact evaluation and intelligence sharing

AHDB resource

- Teams covering all sectors including Livestock and Crops
- French office covering EU markets principally for Livestock products with a network of representatives in Germany, Italy, Netherlands, Portugal, Poland and Belgium
- Brussels office focused on EU policy and application
- Market intelligence provision in US
- Beijing based representative via China-Britain Business Council
- Part funding of UK Agriculture Councillor in British Embassy, Beijing

Recent successes

- Taiwan: Pork access granted in 2018
- Philippines: full access for beef, lamb and pork granted
- Ongoing access dialogue with US and Mexico, inward inspections anticipated 2019
- Further pork approvals for China
- Events including SIAL China, Foodex Japan, ANUGA
- Recent commercial mission for beef/lamb exporters to Foodex Japan following access being granted in January

Red meat highlights



China: pork worth £70M in '18



Philippines: trade growing

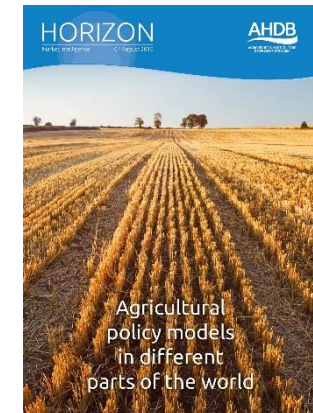
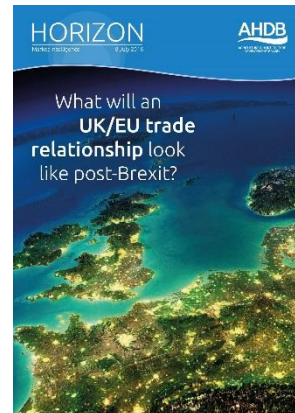
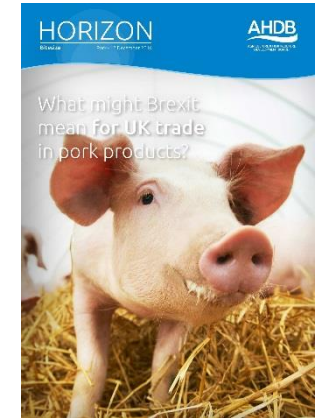
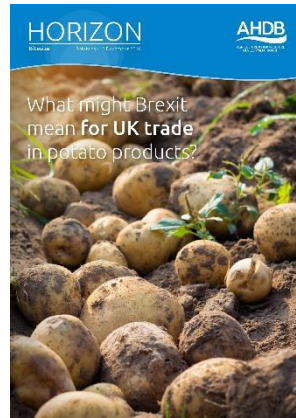
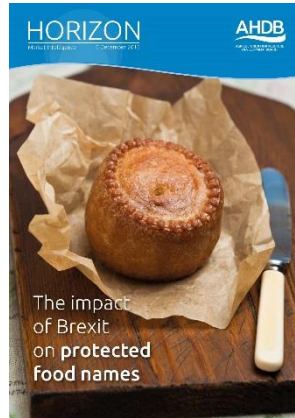


Hong Kong: premium opportunities

GREAT



AHDB has explored Brexit issues within the Horizon series



UK food and drink trade heavily EU dependent



Source: UK HMRC
Note: includes alcohol

So where are we now?

- 10/04/2019 – PM's request for an extension approved by EU leaders:
 - **New Brexit day: 31 October 2019**
 - **Flexible extension:** Brexit can happen before that day if UK MPs ratify the Withdrawal Agreement
 - Some **conditions** were set:
 - UK must hold European Elections
 - UK must act “in a responsible manner, according to its *withdrawing* situation”
 - No re-opening of WA, no negotiation on future relationship



What happens if the WA is ratified?

- Transition period until 31 December 2020
 - ✓ EU law continues to apply to and in the UK as if it were a MS
 - ✓ UK remains in the EU Customs Union and Single Market
 - ✓ UK remains bound by all EU international agreements (including FTAs)
- BUT:
 - ✗ UK is no longer represented in EU institutions, agencies and bodies

What happens if there is no deal?

- UK will be a third country as of 1 November 2019
 - ✗ EU law will no longer apply to and in the UK
 - ✓ UK-EU relationship governed by general international public law
 - ✗ UK outside of the EU Customs Union and Single Market:
 - ✓ Trade relationship governed by WTO rules (tariffs, border checks, SPS controls...)
 - ✗ UK no longer bound by all EU international agreements
 - ✓ UK will be stepping out of some 70 FTAs the EU has negotiated with third countries (eg Japan, Canada)

In the event of a No Deal...

EU and UK import tariff rates for selected beef, lamb and pig meat products

Code	Product	EU tariff rate (2016-18 average prices)	UK tariff (2016-18 average prices)
Fresh/chilled Beef			
02011000	Carcase/half carcase	70%	37%
02013000	Boneless cuts	41%	35%
Fresh/chilled Lamb			
02041000	Carcase/half carcase	76%	76%
02042300	Boneless	60%	60%
02042250	Legs	48%	48%
Fresh/chilled Pork			
02031110	Carcase/half carcase	30%	4%
02032955	Boneless cuts	35%	5%
02031211	Bone-in hams and cuts	44%	6%

TRQ of ~230,000
tonnes
would be
implemented

Tariffs outside of preferential trade deals are high for many food products

Key changes for exporters

- UK needs to become a **listed exporting third country** to the EU
 - ✓ Necessary legislative texts already approved by EU Member States (09/04/2019):
 - Three geographical territories will appear: GB (Great Britain + Northern Ireland), GG (Guernsey), JE (Jersey)
 - The Isle of Mann will not be listed
 - As soon as a no deal happens, UK will be able to upload the full list of approved establishments involved in the processing and exporting of animal products
- Export Health Certificates (**EHC**) needed - signed by an **authorised signatory** such as an official vet (another Brexit related problem: shortage of vets)
- The goods will need to enter the EU through a border inspection post (**BIP**)
- The EU-based importer will have to **notify** the BIP prior to the arrival of the consignment, and upload a copy of the EHC on TRACES

EU approved Border Inspection Posts

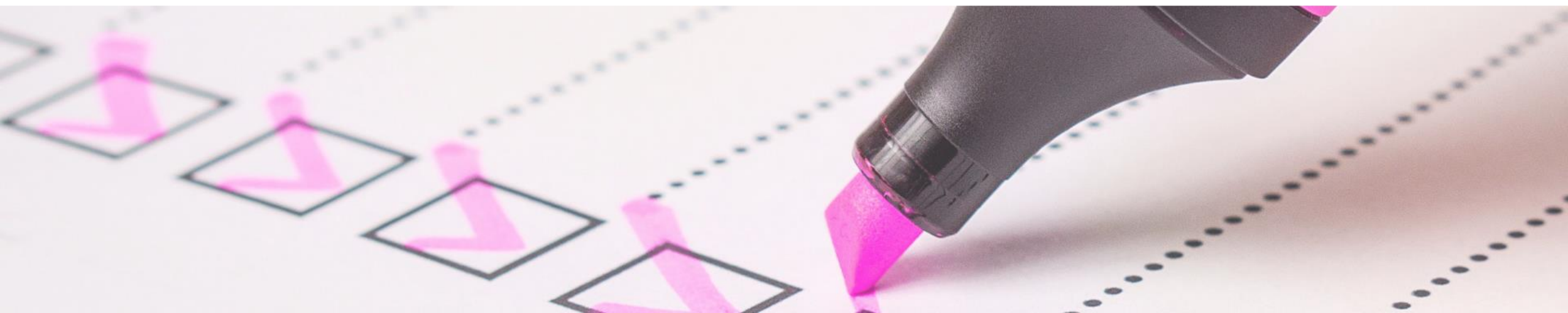
- Full list: Commission Decision 2009/821/EC
- Latest amendment (12/04/2019): 16 new/updated BIPs in 6 MS
 - **Belgium**: Antwerp, Zeebrugge
 - **Denmark**: Esbjerg
 - **Ireland**: Dublin Port, Rosslare Europort
 - **Spain**: Ferrol, Santander, Vigo
 - **France**: Caen-Ouistreham, Calais, Calais (Eurotunnel), Cherbourg, Dieppe, Roscoff, Saint-Malo
 - **Netherlands**: Rotterdam



- ✓ In order to minimise disruption, the **UK has been granted continued access to TRACES**, the EU's import notification system. However, UK access will be limited as a third country (only data relevant to its territory). Therefore:
- Imports from the EU: exporters in the EU can continue to use TRACES to notify authorities if they are planning on exporting to the UK
 - Imports from non-EU countries: UK importers will need to use a new UK system called the Import of products, animals, food and feed system (IPAFFS)
 - Exports from the UK to the EU: import agents in the EU must notify the BIP through TRACES upon arrival of their consignment

Producers also need to prepare

- Important steps to minimise disruption:
 1. Get a UK **EORI** number
 2. Plan with logistics providers for the appropriate trade route for your products
 3. Check the documents and systems you will be required to use/provide
- Beware!
 - EU's customs processes for third countries will apply to the UK
 - Tariffs will apply



There are opportunities globally



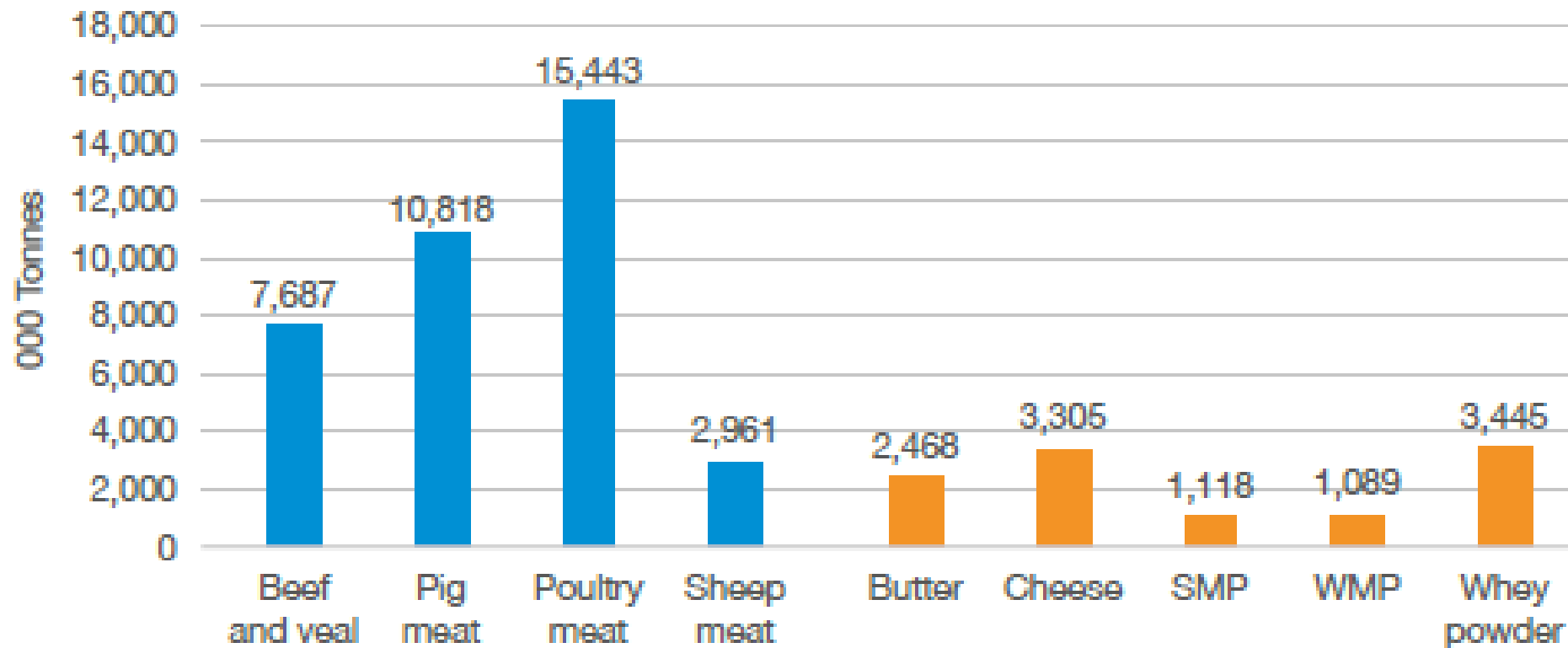
- UK aims to leave the EU Customs Union and strike trade deals with countries around the world
- Risk of less favourable access to the EU market
- Aims to identify which markets, beyond the EU, offer the greatest opportunities

What is driving demand?

GROWTH IN GLOBAL MIDDLE CLASSES	2009 No of people (m)	2009 Global Share (%)	2030 No of people (m)	2030 Global share (%)
North America	338	18%	322	7%
Europe	664	36%	680	14%
Central and South America	181	10%	313	6%
Asia-Pacific	525	28%	3228	66%
Sub-Saharan Africa	32	2%	107	2%
Middle East and North Africa	105	6%	234	5%
World	1845	100%	4884	100%

Significant global opportunities – if we can compete

Projected Growth in Global Consumption 2016-2026



Source: AHDB, OECD-FAO. Dairy figures are product weight



International Meat Secretariat

- Founded in 1974 to represent the global meat and livestock sector
- 80 members across 25 nations representing around 75% of global commercial meat production
- National organisations covering their meat/livestock interests
- Representation on key platforms inc Codex, FAO, OIE, etc
- Hosts the World Meat Congress every 2 years with c600-1000 global delegates

- *To promote the sustainable supply of safe, healthy, high quality and nutritious animal proteins as an essential part of a healthy diet*
- Champions quality, science based solutions and policy, innovation, free/fair trade and sustainable business
- Key issues inc environmental challenges, nutrition, food security and sustainability
- Achieved by pooling global knowledge for members and academics to feed high quality information into key organisations to facilitate decision/policy making

In conclusion

- Global trade is increasing the opportunities for UK processors to add value to the sector through exports
- But, our world is one of change and Brexit will provide both challenge and opportunity
- We will continue to work closely with UK and overseas Governments to develop new agreements to support export growth

A vibrant landscape at sunset. A dirt path leads through a lush green field towards a distant horizon. The sun is low on the horizon, creating a warm glow and long shadows. The sky is filled with colorful clouds in shades of orange, yellow, and blue. The overall scene is peaceful and inspiring.

**‘Inspiring our farmers, growers and
industry to succeed in a
rapidly changing world’**

Go to: slido.com

Event code: #Meat2019



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PANEL Q&A



INSPIRE • NETWORK • GROW

BACK AT 1.30PM



INSPIRE • NETWORK • GROW

WELCOME BACK



LEADERSHIP IN A WORLD OF SPEED

CAFFE!NE®
STIMULATING BUSINESS



SOPHIE DEVONSHIRE
CEO, THE CAFFEINE PARTNERSHIP

CAFFE!NE[®]
STIMULATING BUSINESS

SOPHIE DEVONSHIRE



SUPERFAST LEAD AT SPEED

How pace can drive performance



100





THE NEED FOR SPEED.



\$58billion
58 countries



LAUNCH





\$58billion
58 countries

5
YEARS





1,000,000

86

YEARS



1,000,000

7

YEARS

Impatience









RESPONSIVE
RESPONSIBLE



PACE-SETTERS





SET THE PACE



RIGHT

SET THE PACE



CAFFE!NE®

STIMULATING BUSINESS



YOUR PACE



SETTING THE PACE for
your team

***"I don't have time to
think..."***



THE
POWER
OF THE



pause

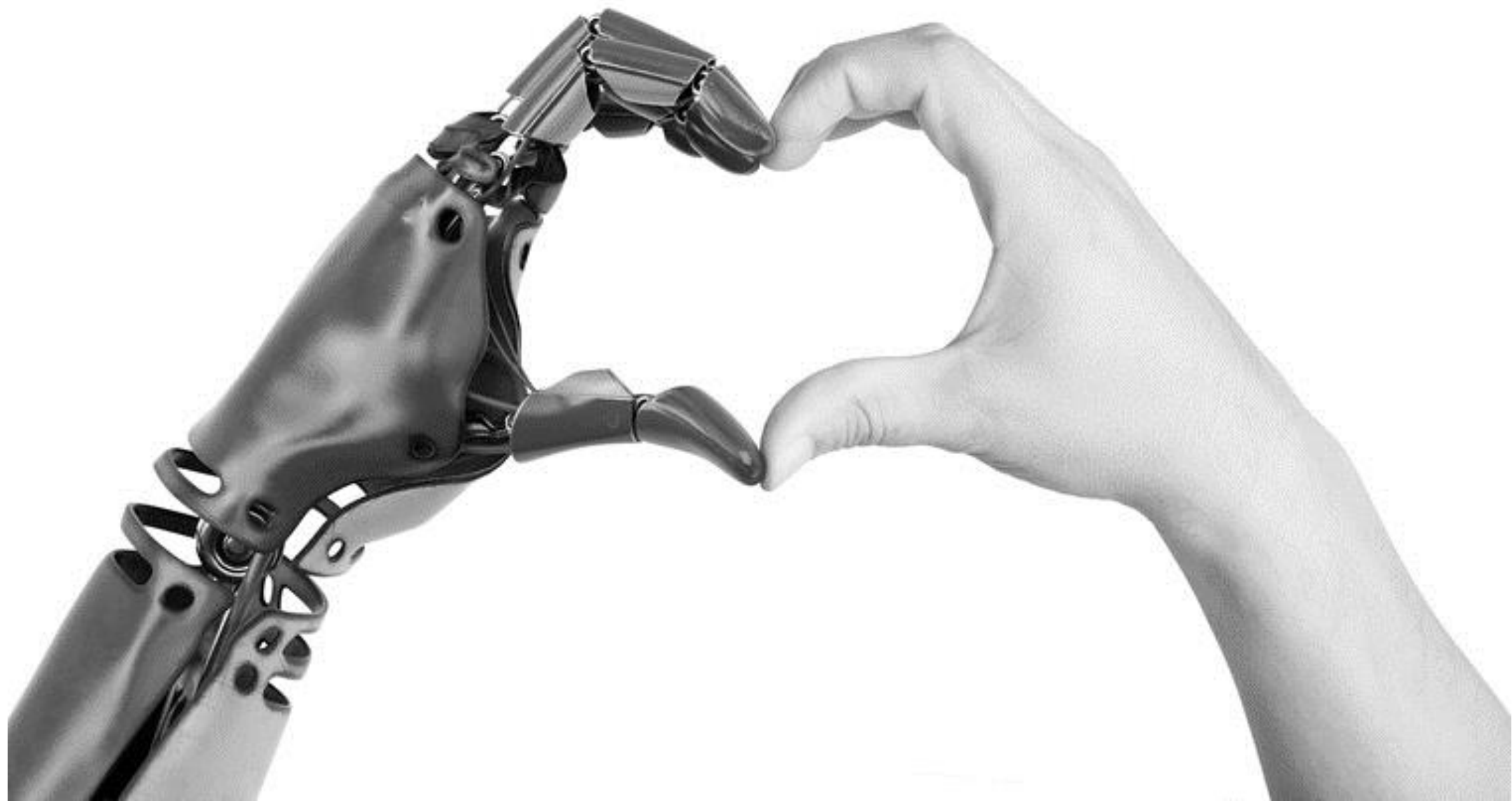




Velocity *n.*

[vuh-los-i-tee]

SPEED, IN THE RIGHT DIRECTION





empathy



KiKorothy

CUSTOMER

WELCOME TO NARCISSISTS
ANONYMOUS. NOW BEFORE
WE GET STARTED, LET'S TALK
ABOUT ME FOR A WHILE.



Shiell

A blue-tinted image of Earth from space, showing the curvature of the planet and swirling cloud patterns. A bright sun is rising over the horizon, creating a lens flare effect with rays of light extending across the sky.

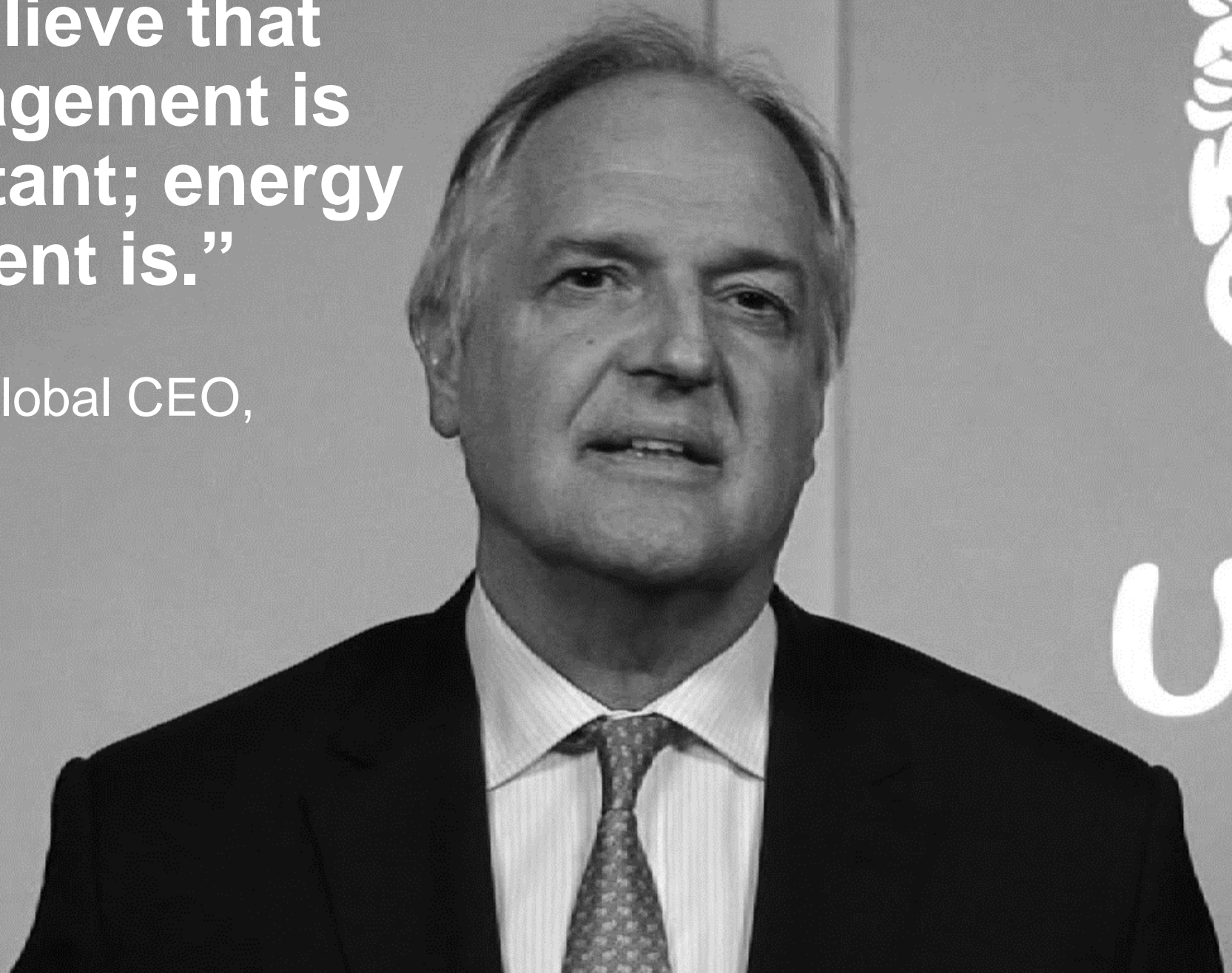
**ENERGY IS
EVERYTHING**



energy

**“I firmly believe that
time management is
not important; energy
management is.”**

Paul Polman, Global CEO,
Unilever



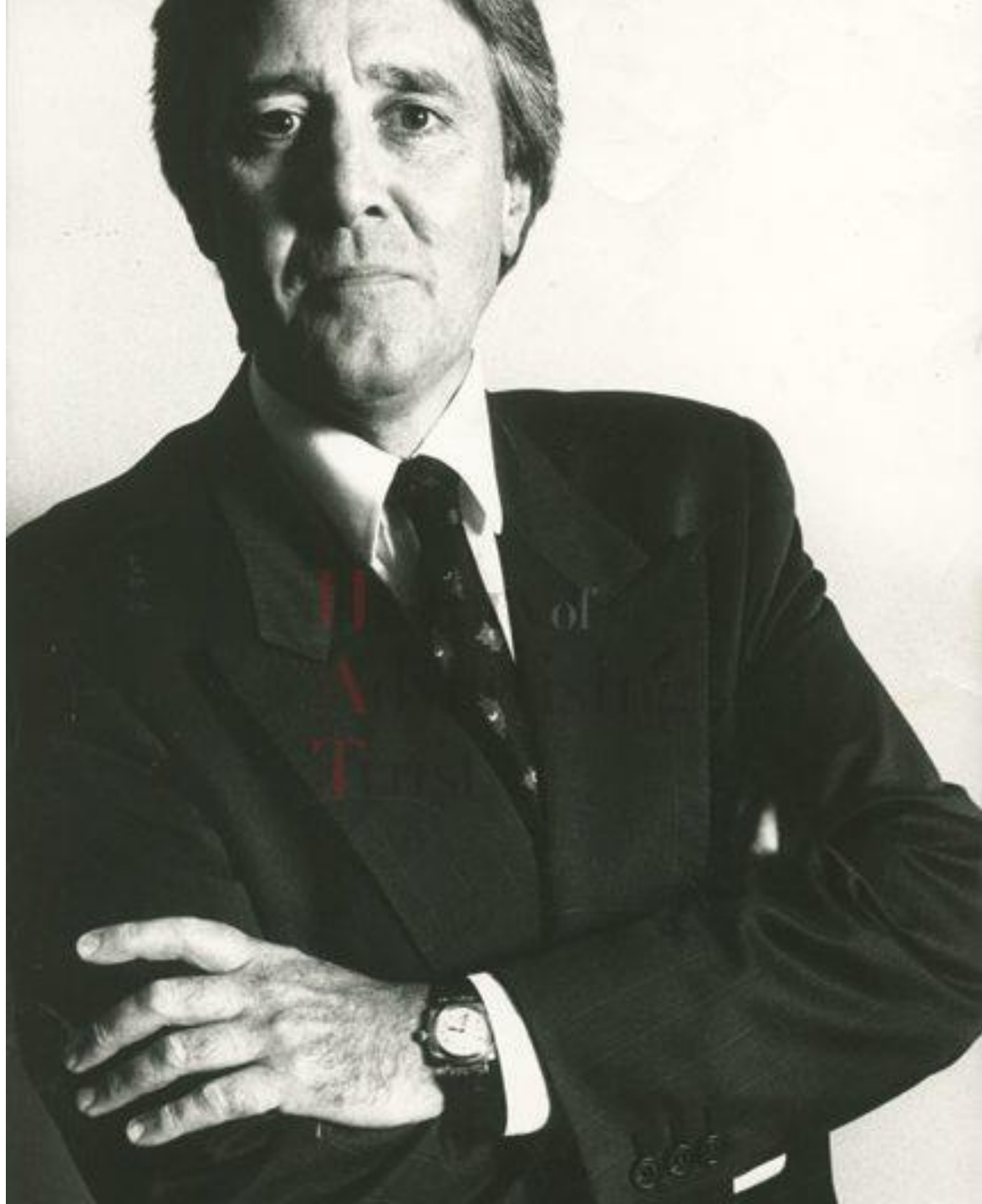


THE DIARY TEST



STRATEGIC

laziness



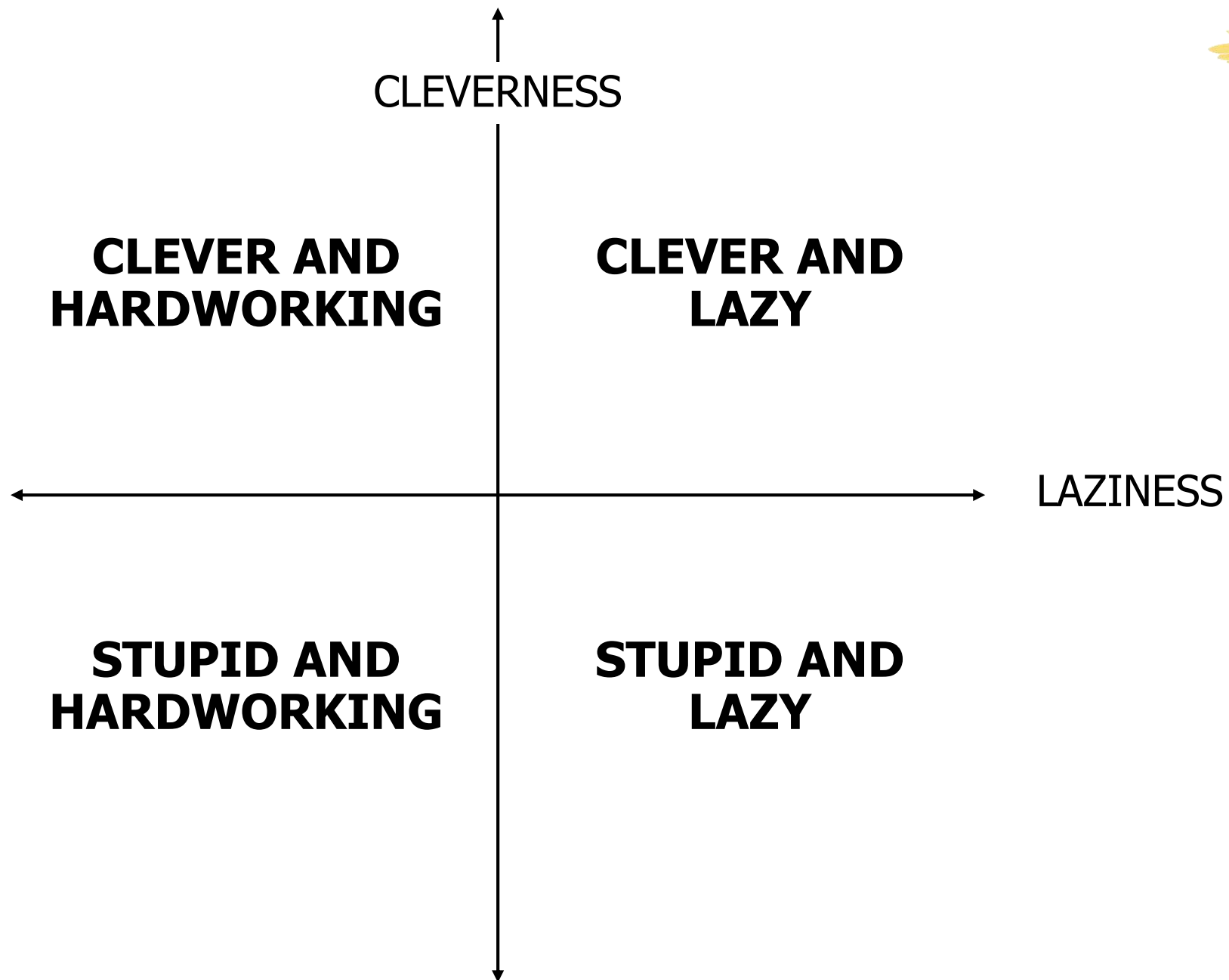
lazy thinking
HELPS



“I divide my officers into four classes as follows: the clever, the hardworking, the lazy, and the stupid. Each officer always possesses two of these classes.”

Kurt von Hammerstein-Equord
Commander-in-Chief of the Reichswehr 1878-1943







editing

TO MOVE FASTER



do less

**CHOOSE
CURATE
FOCUS
EDIT
PURGE
PRIORITISE**

HIGH



Velocity

LEADERSHIP



“Speed matters in business – plus a high-velocity decision making environment is more fun too.”

Jeff Bezos, CEO Amazon



citius est melius

@s_devonshire
@caffeinepartner

CAFFE!NE®
STIMULATING BUSINESS

www.ThisIsCaffeine.Com



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Mentoring in action

Mel Wombwell and Kylie Roberts
SHIFT unlimited

Not sitting down: Elin Ersson

<https://www.youtube.com/watch?v=ZSJ7du-EC9w>

93%

56%

24%

78%



Create the life you love

Space to think, dream, connect & create...

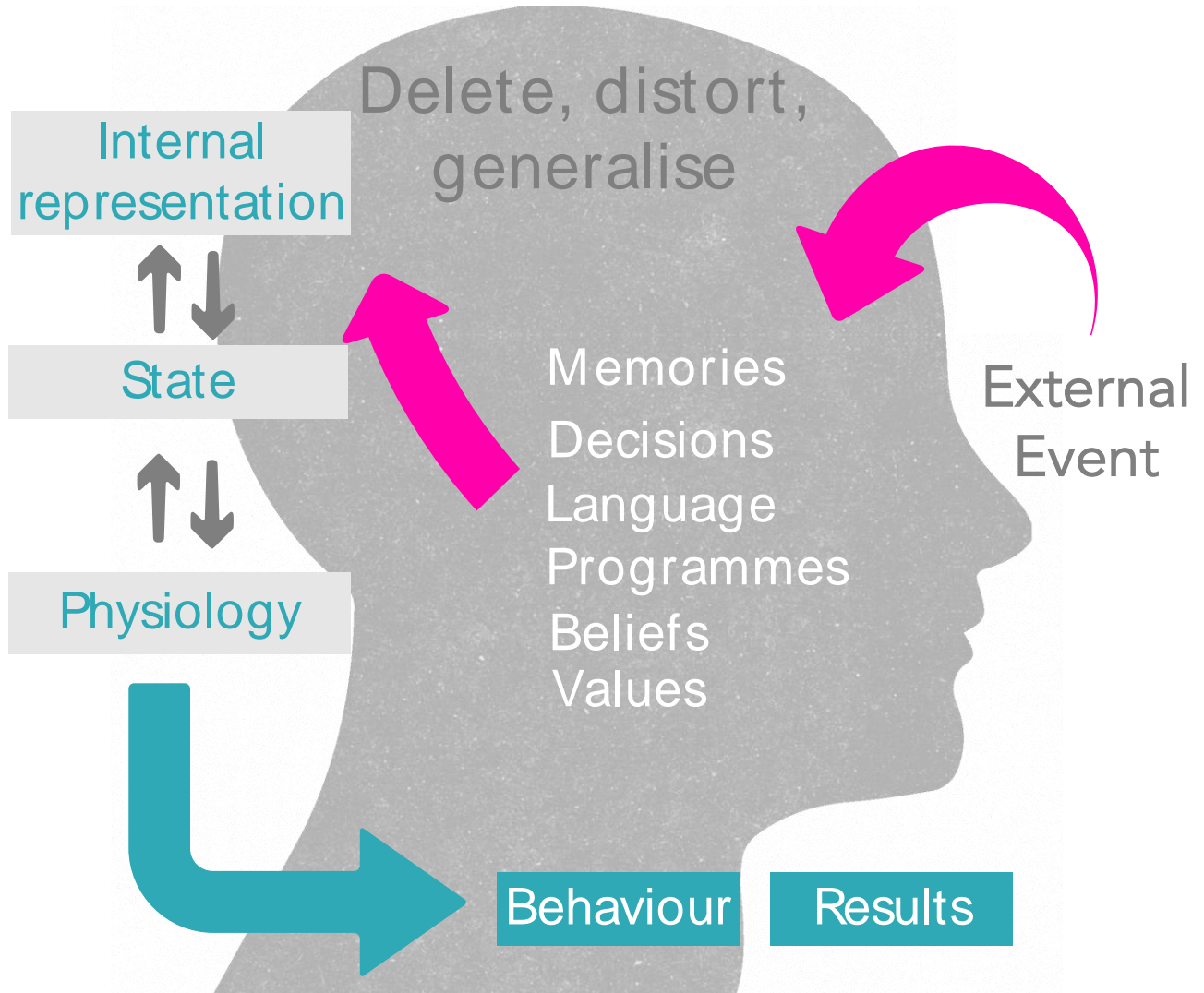
Kylie Roberts & Mel Wombwell

VUCA
Volatile
Uncertain
Complex
Ambiguous

What is mentoring and what is coaching?

A coach has some great questions to help you find your answers; a mentor has some great answers for your questions.

Every answer has a short shelf life; questions though last forever.



Theodore Roosevelt (1910)

It is not the critic who counts; not the man who points out how the strong man stumbles, or where the doer of deeds could have done them better. The credit belongs to the man who is actually in the arena, whose face is marred by dust and sweat and blood; who strives valiantly; who errs, who comes short again and again, because there is no effort without error and shortcoming; but who does actually strive to do the deeds; who knows great enthusiasms, the great devotions; who spends himself in a worthy cause; who at the best knows in the end the triumph of high achievement, and who at the worst, if he fails, at least fails while daring greatly.

Vulnerability

What are the things you are challenged by at the moment that you are not sharing or acknowledging with others? Acknowledge them here.

.....

.....

.....

In the last 12 months, when did you feel most vulnerable? And how did you respond to this vulnerability? What is your coping mechanism when you are stressed, ill etc. How does this way of coping help and hinder you?

.....

.....

.....

.....

.....

Commit to talking about these vulnerabilities to a trusted person(s) or loved one.

"You can't get to courage without walking through vulnerability" Brene Brown

18

In the last 12 months, when did you feel most vulnerable?

And how did you respond to this vulnerability?

What is your coping mechanism when you are stressed, ill, run down etc?

How does this help or hinder you?

PLAYBACK

What I heard you say is...

Have I got you?

Is there more?

List five ways
that you get in
the way of your
own happiness
and success

GROW model for coaching

G: What is your goal?

R: What is your reality?

O: What options are there?

W: What will you do?

Sheryl Sandberg, Mentorship Matters

<https://www.youtube.com/watch?v=b9FIKLhx4hc>

Inspired to act

Four opportunities:

1. **Comprehensive list of questions for GROW**
2. **Create the life you love £10 today**
3. **NLP and Coach Practitioner programme**
4. **Meat Business Women mentoring network**

www.shiftunlimited.com

Mel Wombwell: Mel@shiftunlimited.com

Kylie Roberts: Kylie@shiftunlimited.com



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Department
for Environment
Food & Rural Affairs



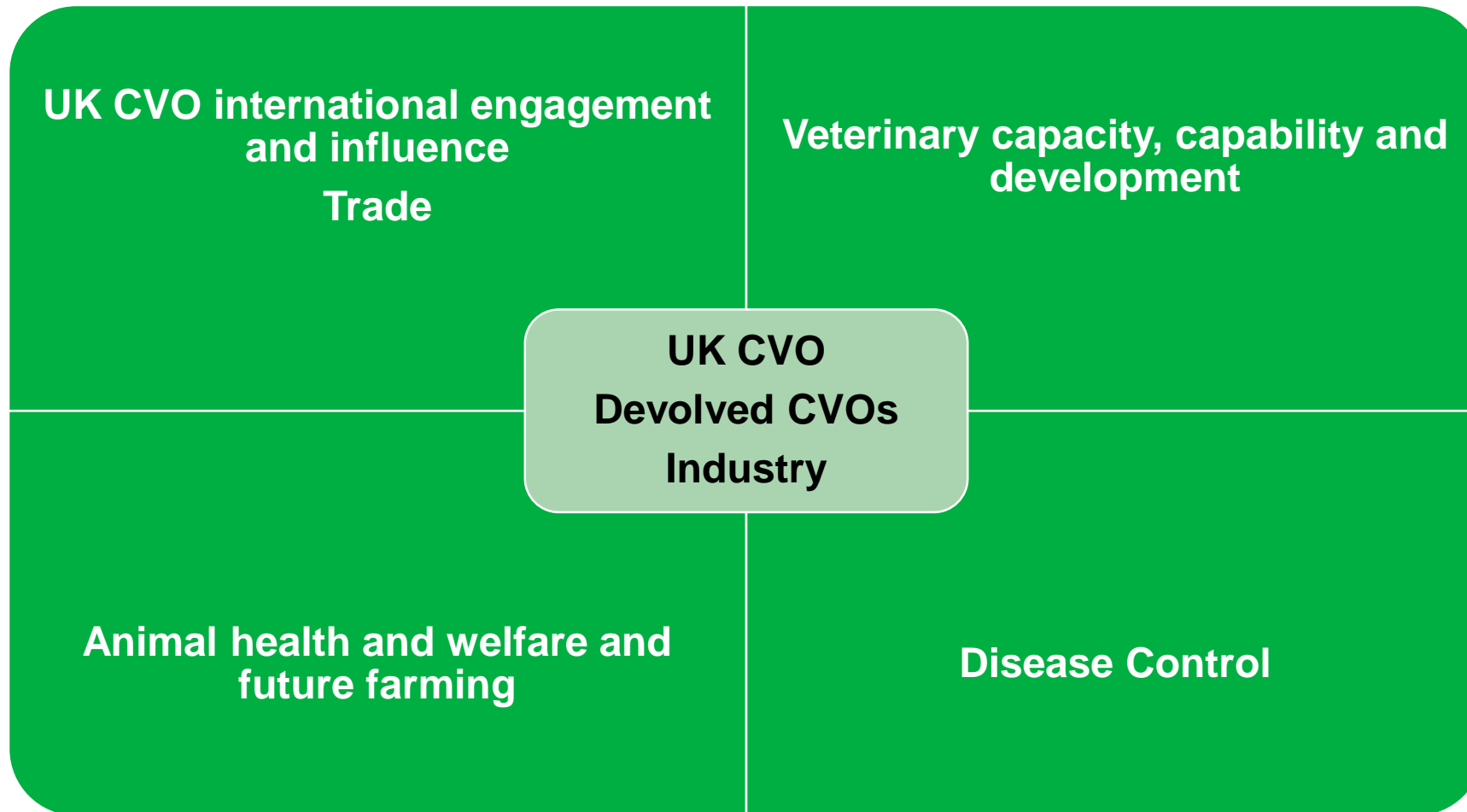
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My UK CVO perspective on the future of our industry

MBW conference

Christine Middlemiss, UK Chief Veterinary Officer
14th May 2019

UK CVO role



Three Challenges

- **Getting the balance right**

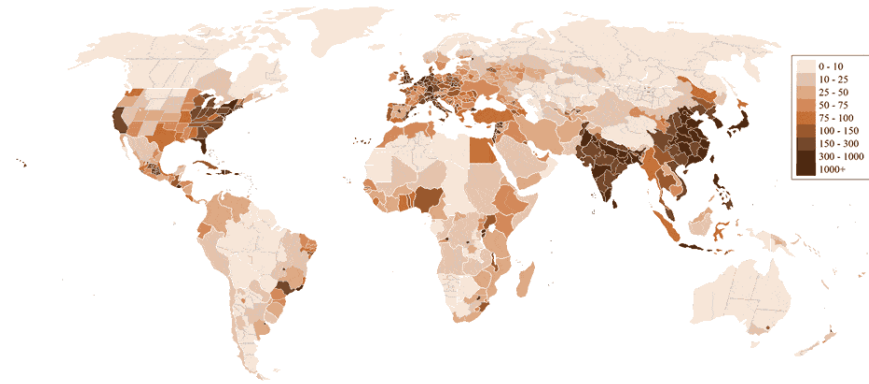
- Affordable nutritious food
- Enough to feed the world
- Minimum environmental impact

- **ASF & other Exotic diseases**

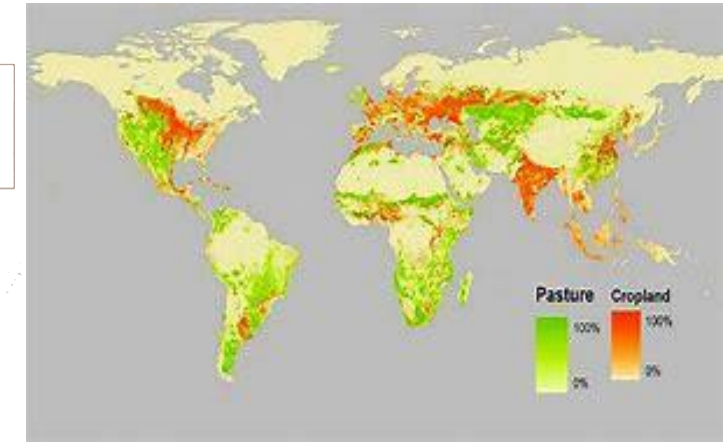
- Constant but changing threat
- Current situation
- Horizon scanning

- **EU Exit:**

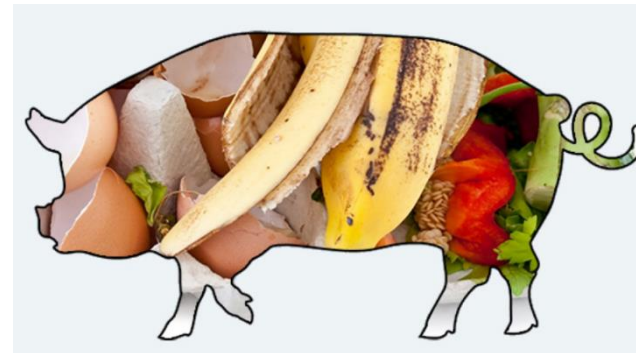
- Challenges & Opportunities



Global Population



World Agriculture Map

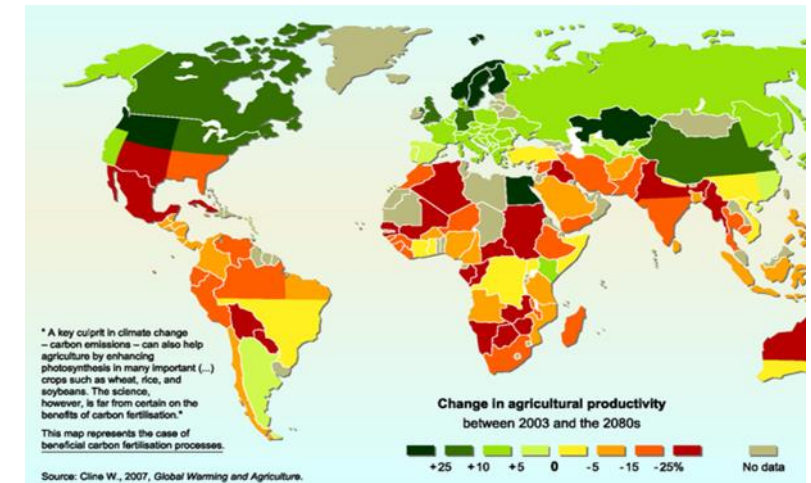
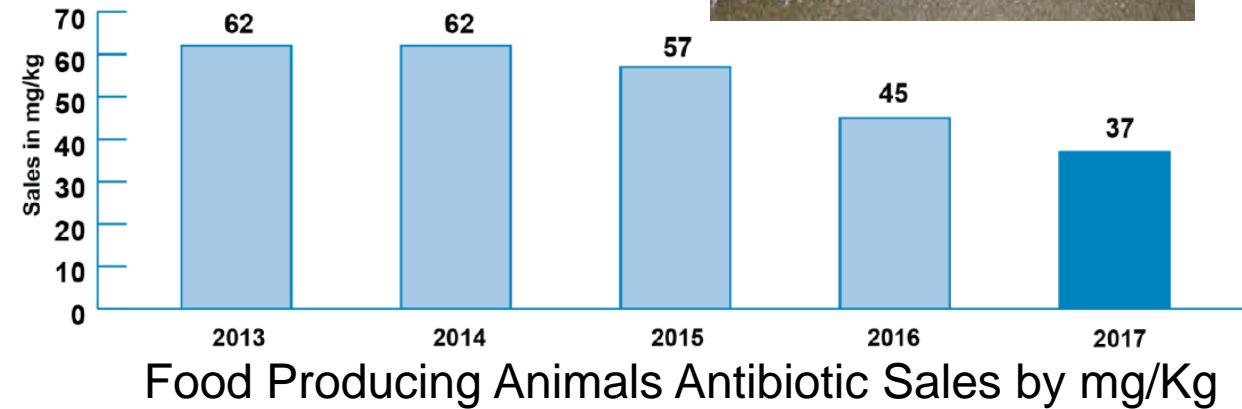


Getting the balance right

...for a sustainable well-fed healthy world

- Climate change
- Anti-microbial resistance
- Society wants and expectations
- Environmental protection
- Social media

- UK Role – science and evidence based policy
- UK USP – world leading animal health and welfare
- UK farm to international fork
- Technology and intelligence
- Responsibility and accountability



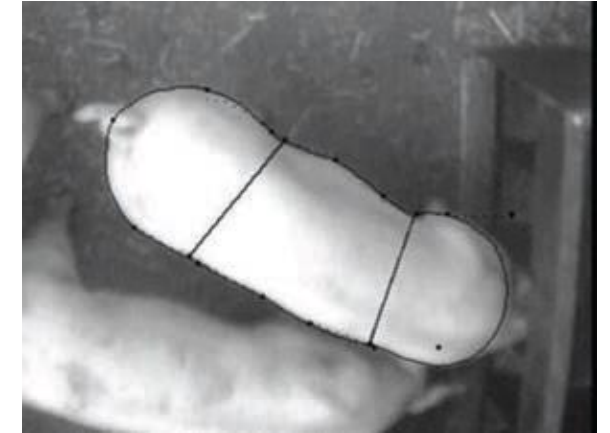
Farming Productivity Change

Getting the balance right

...for a sustainable well-fed healthy world

Fewer inputs, more outputs, environmental care

- Bovine TB
- Endemic disease reduction – Future Farming
- Animal welfare
- Role of wildlife
- Precision Livestock Farming (PLF)
- Livestock Information System (LIS)



Camera-based Weight Assessment for pigs



African Swine Fever

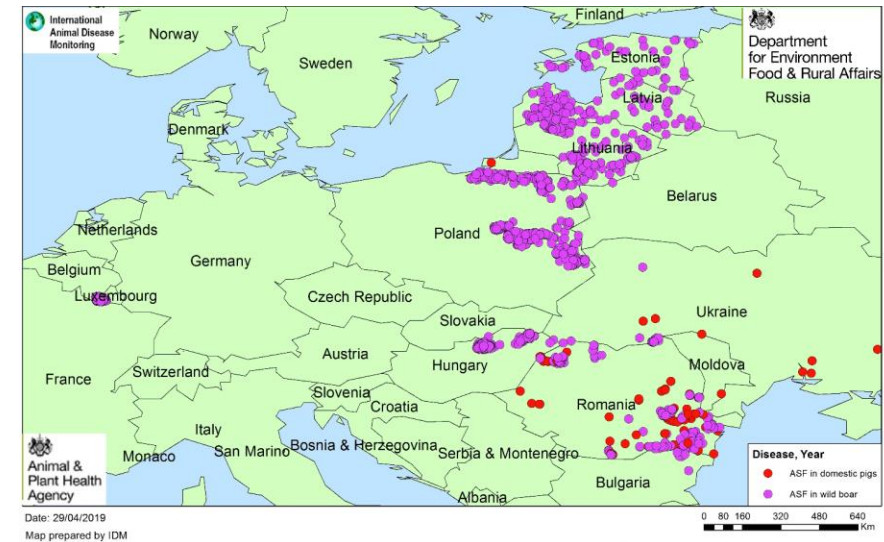
- a current exotic disease risk

Risk and Opportunity

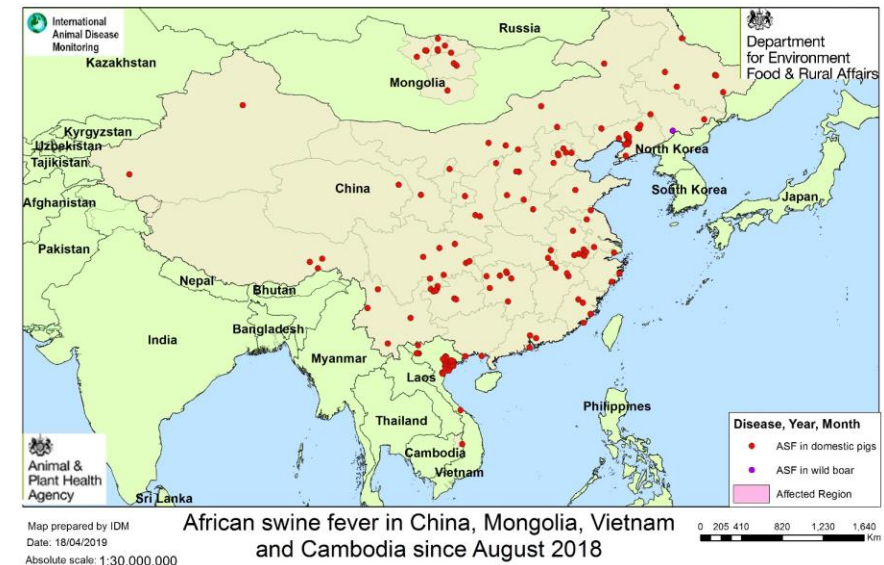
Why take action?



- Public health impacts
- Economic and wider society impacts
- Trade Impacts and Opportunities
- Animal welfare



African swine fever in domestic pigs and wild suidae since January 2019

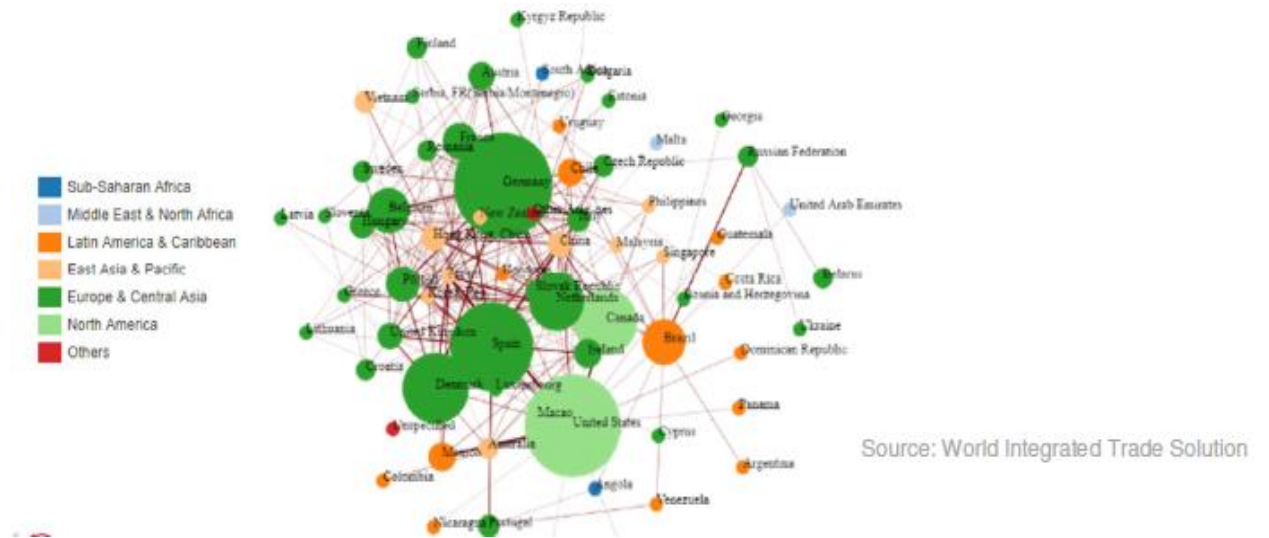


African swine fever in China, Mongolia, Vietnam and Cambodia since August 2018

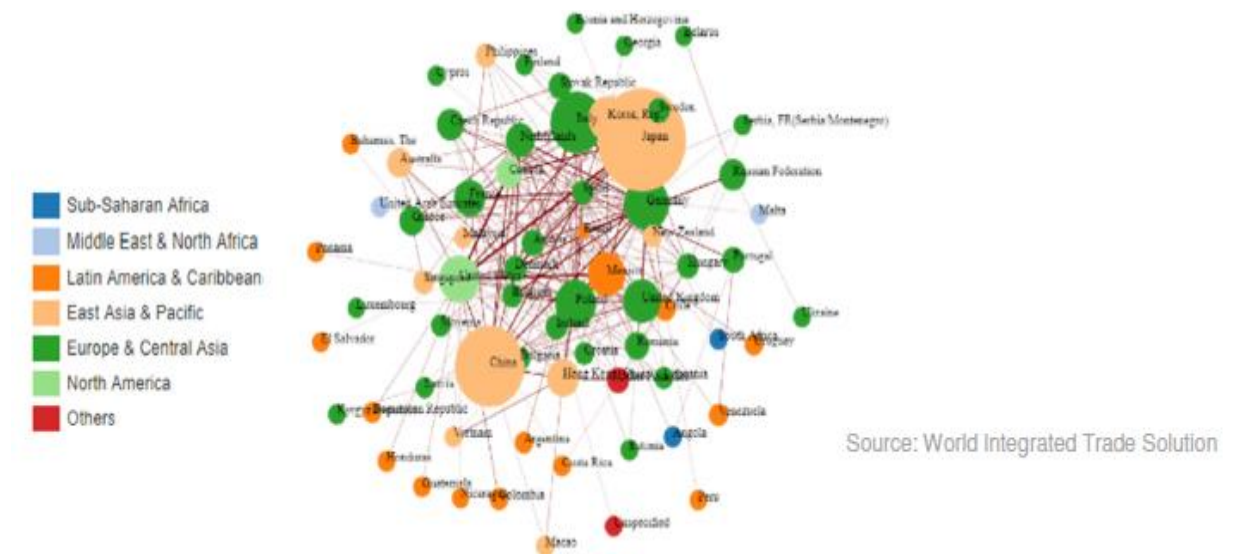
Changing Disease Risks

- changing climate and trade routes

- Horizon Scanning
 - international disease monitoring
 - meteorological modelling
- Risk assessment and analysis
- Testing technology
- Artificial intelligence
- Social media
- Open access information on **Gov.uk**



Global pork exports



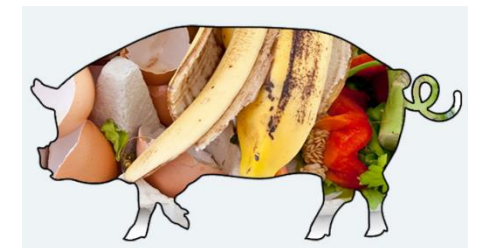
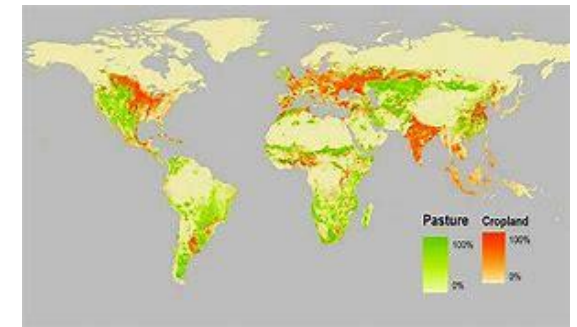
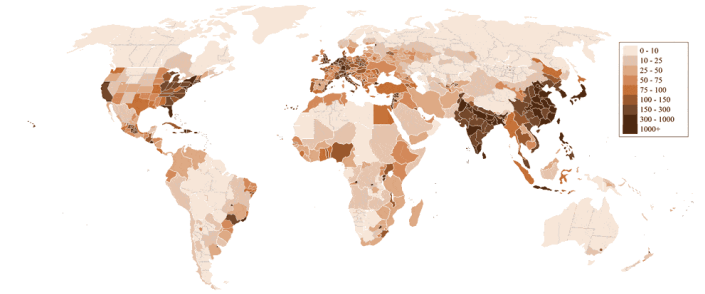
Global pork imports

EU Exit challenges and opportunities



Our 3 Challenges...or Opportunities

- We need to:
- Aim to be world leading so need science and evidence
- Have trust and transparency
- Engender collaboration and co-operation



Farm to Fork to CVO

- Personal biography:
 - Sheep and cattle farming background – women farmers
 - Farm animal practitioner and OVS
 - BSE and FMD
 - CVO NSW & UK
- What I get from being UK CVO:
 - Complex problem solving
 - Making a difference
 - People
 - Unique experience



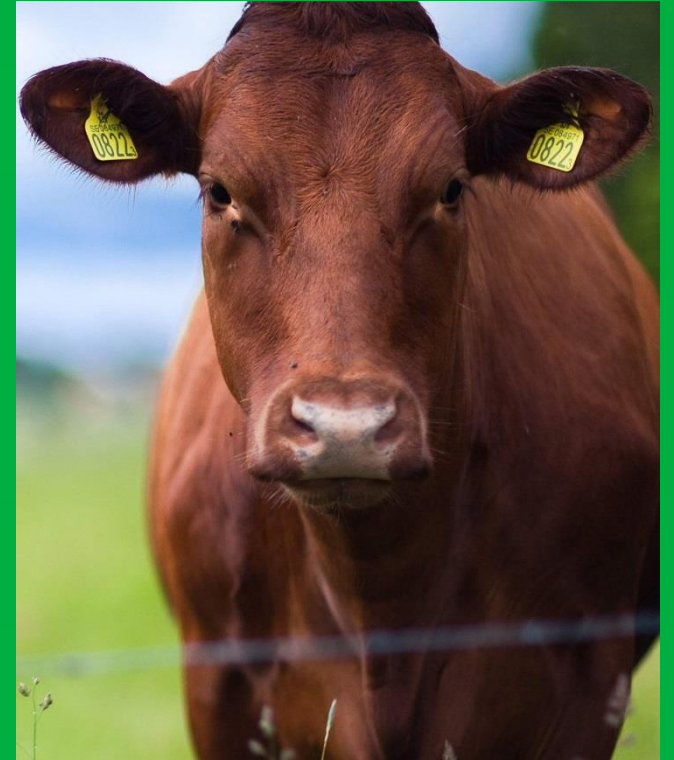
Reflections

- Women still a minority in senior roles in Industry
- Women making progress in the vet world in Europe
- Reframe what we do to engage our audience:
 - Feed the world
 - Make a difference
 - Work as a team





Department
for Environment
Food & Rural Affairs

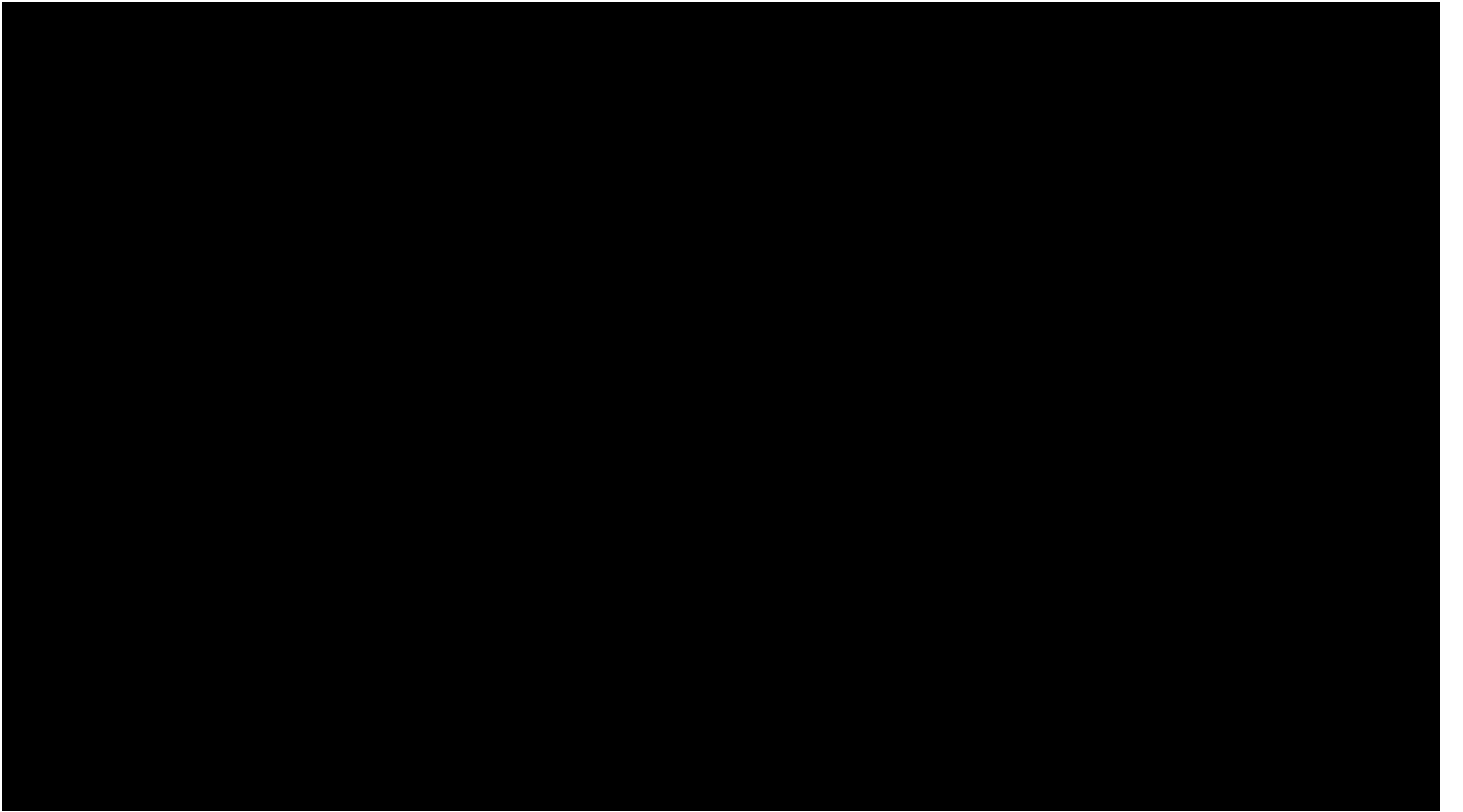


Thank you for listening





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Speed Networking Dinner at Butchers' Hall

2nd Oct 2019

Early Bird Rate: £85

Speakers include:

- **Minette Batters – President, NFU**
- **Rachel Griffiths – Director of Business, Moy Park**
- **Vanessa Di Cuffa – People Director, ABP**
- **Harriet Wilson – Corporate Responsibility Manager for ALDI UK & Ireland and winner of the 2018 “One to Watch” Prize**



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