



BPEX Business Plan 2014/15

Introduction

The Board recently agreed the BPEX strategy for 2014-2018 - "Going for Growth". This sets out a 5 point plan to deliver the BPEX mission:

"To help English pig production and processing businesses become more competitive and profitable".

This will be delivered by helping English pig production business to reduce the performance gap against our competitors by identifying incremental gains and accumulating these over time. In addition we will help the industry maximise the price premium in the British market, derived from both domestic and overseas demand.

This plan details how the 5 point strategic plan will be delivered in 2014/15, the targets to be achieved and the proposed budget.

The Board is asked to consider, discuss and agree the plan at the January Board meeting.

The 5 Point Plan

The delivery of the business plan will be focused on the 5 key points in Going for Growth.

1. Close the gap
2. Protect the environment
3. Enhance pig welfare
4. Encourage safe and traceable pork
5. Help sell more pork

These activities will be integrated and reinforcing of each other. For example, when we help the industry reduce its impact on the environment through the more efficient use of resources we should also help to close the productivity gap against our competitors. Another example is the "One Health" plan for pigs that seeks to reduce the risk of food borne disease through actions that will also improve pig health, welfare and productivity.

We will organise our teams in the most efficient and effective way that enables us deliver the maximum benefit to our levy payers. We will focus our activity through a Technical Team and a Marketing Team.

We will make maximum use of collaborative working with our AHDB colleagues where this delivers mutual benefit. We will focus this collaboration on Market Intelligence, skills development, specific cross sector projects and research funding from UK and EU sources. We will work closely with EBLEX on meat related issues and opportunities.

We will communicate effectively with our levy payers, the allied industry, regulators and others that have a significant influence on pig production and processing.

We will work in cooperation with representative organisations as a provider of information and analysis where this benefits English levy payers. We will not engage in political lobbying but will provide factual information to politicians on issues of interest to the industry. We are part of AHDB which is a Non Departmental Public Body sponsored by

Defra. We therefore have to operate within a legal framework that includes national and EU law. We will engage with Defra and other government departments and agencies in the monitoring and interpretation of existing and emerging regulations.

We will maintain a policy of active engagement with similar organisations in other countries and with multinational organisations where network building is considered to be of value to English levy payers.

1. Close the Gap

Objective: Narrow the technical performance gap between English pig producers and our competitors.

Analysis of GB and EU technical performance indicates that there has been a closing of the average performance gap in the GB finishing herd and limited progress in GB indoor breeding herds. Outdoor breeding herd performance remains relatively static.

The 2014-15 financial year will cover a transitional period during which a more focused agenda to deliver improvements in pig technical performance will be established. The overall objective will be to help the industry improve average breeding herd performance by 1.0 pig/sow/year, increase finishing DLWG by 50g and enhance FCR by 0.1.

To achieve this we will:

- Establish a single regional field team with increased focus on delivering technical support to businesses. This will be tailored to the needs of corporate and independent producers as appropriate.
- Introduce four new Regional Technical Forums comprising producers, vets and allied industry representatives. Regional Technical Forums will support BPEX field teams in identifying and prioritising knowledge gaps, emerging technical issues and robust field trials to be established in commercial settings. They will encompass the work done by the Pig Health Improvement Project. The forums will also deliver a more efficient platform for knowledge transfer within the region delivered by BPEX and via third parties. It is proposed that the chairs of the Forums also sit on a BPEX Technical subgroup.
- Help identify, manage and fund to an appropriate degree a robust field trials programme to demonstrate and adapt global best practice. Fundamental and applied research will be considered if it can be demonstrated to contribute to knowledge gaps which are relevant and a priority for English production and processing businesses. This knowledge will be disseminated into individual businesses through an increased focus on farm technical reviews.
- Support skills development for all levels of pig production staff. Delivery will be tailored to suit business type and technical content of the training package with increased emphasis on third party delivery to enable the field team to focus on technical farm reviews. Expansion of the technical content of the Practical Pig App platform encouraging third parties to develop content for the App will provide a valuable and cost effective training resource for individual businesses and supply chains.

- Develop online pig health resources including herd health mapping tools and herd health cost calculator which can be used by producers and other industry partners to deliver health improvement programmes within individual businesses. Pig health and welfare and food safety activity will be coordinated with production efficiency activity under a “One Health” concept.
- Work in partnership with the wider AHDB group to assist individual businesses and supply chains to identify and access external research and knowledge transfer platforms and funding opportunities such as Agri-Tech and Horizon 2020.
- Deliver a range of Market Intelligence services and data to support business decision making by levy payers through the BPEX website, weekly and monthly reports, industry briefing meetings, and electronic media. Content will include price reporting, supply and production data, market analysis, input cost analysis and forecasting data. EU legislation, policy, production and price data will be provided via the AHDB Brussels’ office. The competitive position of the English pig meat industry within the EU and key third countries will be monitored and analysed. Market Intelligence will be used to assess the delivery of the BPEX strategy.

1. Close the Gap.

Objective: Narrow the technical performance gap between English pig producers and our competitors.

Activities	Outcomes	Targets and Monitoring
<p>Establish regional technical forums - comprising producers, vets, and AIG representatives to meet every 6 months to inform, prioritise and co-ordinate knowledge acquisition and farm trials/demonstration activity for businesses in the region</p>	<p>More direct ownership and understanding of BPEX investment in technical activity. Better co-ordination and more efficient delivery of activity between BPEX and other regional stakeholders including vets. More effective linkage between levy payers and BPEX technical staff</p>	<p>2 x regional technical forums held per region per annum comprising 6 producers, 2 vets 2 AIG Recommendations for 12 protocol trials Identification of 4 specific knowledge gaps to be addressed Record % of BPEX technical activity delivered by third parties to establish a baseline</p>
<p>Global knowledge acquisition and dissemination – identifying global new applied knowledge and pig production technology through attending conferences, research centres, and global networking. Disseminating knowledge via regional technical forums, workshops, conferences, via third parties and directly with BPEX levy payers</p>	<p>Assimilating commercially relevant new knowledge and best practice in pig production and disseminating it to all BPEX customers and associated stakeholders directly or indirectly. Identifying and undertaking appropriate field trials and adapting and/or demonstrating new knowledge and techniques.</p>	<p>Increasing average breeding herd performance by 1.0 pig weaned per sow per year increase. Increase DLWG by 50g Improve FCR by 0.1 Complete 6 knowledge dissemination events with 75% of delegates identifying 1 or more ideas to implement within 3 months Establish relationships and visit 6 leading EU pig research institutes Conduct 6 study tours 75% of participants identifying 1 or more ideas to implement within 3 months</p>
<p>Cogeneration of knowledge through on farm trials to adapt and demonstrate global knowledge and address issues identified through the regional technical forums.</p>	<p>Delivery of commercially relevant protocol based technical trials on a range of commercial facilities driven by adaption of global knowledge and regional technical forum prioritisation. Enhance knowledge dissemination and adoption by individual businesses to drive technical performance.</p>	<p>Establish 8 field trials based on feedback from regional technical forums and partnerships with AIG and supply chains 75% awareness of field trials programme with BPEX levy payers. 50% awareness of findings from BPEX field trials with BPEX levy payers, vets and AIG.</p>
<p>Undertake on farm technical reviews to assist individual businesses to identify opportunities to improve technical performance including interpretation of performance data and translation of physical performance improvements into COP benefit</p>	<p>Supporting individual businesses to identify opportunities to enhance technical performance and effectively influence the customer to alter production techniques.</p>	<p>Complete 200 on farm technical reviews, 50% of business implanting at least 2 recommendations from the review within 6 months 75% awareness of on farm technical review service by producers</p>
<p>Assist English pig businesses access external research funds to enhance technical performance eg Agritech, Biosciences KTN, Horizon 2020 capital grant schemes</p>	<p>New technology and/or knowledge developed for and applied by pig industry.</p>	<p>A total of more than £250K of external funding for 2 projects involving a Small or Medium Enterprise working with BPEX.</p>

<p>Provision of production and management skills development delivered by BPEX staff or third parties depending on topic and target audience</p>	<p>Delivery of a suite of commercially relevant, technical skills development products to groups or producers and within individual businesses from new employees through to managers/owners. Establishment of the Practical Pig App and the leading virtual training tool within the English pig industry.</p>	<p>Delivery of 1000 training hours</p> <p>1000 App downloads on to tablets and smartphones 20 additional clips developed in response to supply chain requests</p>
<p>Provision of pig health services and tools to assist individual businesses and associated vets/advisors to make informed management decisions relating to improving pig technical performance.</p>	<p>Delivery of a rodent control training package to producers</p> <p>Delivery of an effective mapping tool to provide producers with a better understanding of other pig premises in their locality and health status, Salmonella farm risk tool, biosecurity tool and herd health cost calculator</p>	<p>200 stock people to receive LANTRA accreditation for the BPEX rodent control course</p> <p>Launch mapping tool supported and promoted by NPA and PVS – 2000 visits and 60% awareness of tool with vets and producers</p> <p>Launch herd health calculator – 500 downloads</p>

2. Protect the Environment

Objective: Help pig producers and processors comply with existing and emerging legislation and achieve recognition for progress made.

The English pig industry is a leader in sustainability. The 2011 Environment Road Map, *Advancing Together*, set ambitious targets to reduce the environmental impact of pig production in the areas of climate change, eutrophication, acidification and abiotic resource depletion. The latest update shows that the industry is well on the way to meet its targets for climate change. The industry remains subject to considerable regulation and increasingly difficult planning restrictions that need to be managed and on occasions informed. These regulations can have a negative effect on farm investment. BPEX will deliver practical solutions and targeted support to enable pig producers to adopt systems, technologies and manage regulation that delivers reduced environmental impact from pig production.

To achieve this we will:

- Provide technical support to businesses seeking to become more efficient through investment in and management of, production facilities and technology which will also help to “Close the Gap”
- Provide continued technical support to producers on the practical implementation of regulation, such as, compliance with the Industrial Emissions Directive (IPPC), Nitrate Vulnerable Zone Regulations, Slurry Storage Construction Regulations and Water Framework Directive, helping to reduce regulatory burdens and address public concerns through better understanding of environmental impacts including odour and ammonia.
- Offer technical support to producers seeking permits and planning permission for new buildings providing general guidance and tools to ease completion of common information requested (eg impact assessments) and facilitating access to information on advances in building design and technologies.
- Engage with UK and EU policy makers and regulators, in conjunction with industry bodies, on technical evaluation and impact assessment of new and emerging environmental regulations of importance to the sector including, the Industrial Emissions Directive (IPPC) - Best Available Techniques (BAT) and reviews of ammonia deposition, soil and water management and protection.
- Manage industry input to strategic activity including the Greenhouse Gas Action Plan and associated activity on climate change adaptation with Defra. Limitations of information currently available in existing research on emission factors and nitrates from outdoor pigs will be identified and solutions developed.
- Continue to develop methods and tools to quantify the benefits of improved practice contributing to “Closing the Gap” e.g. Life Cycle Assessment that can be used at industry level to demonstrate progress in improving sustainability. We will cooperate with others in AHDB to develop and deliver a computer-based resource use efficiency calculator for use in interactions with UK farming and supply chain businesses. This will address: primary energy use (PEU); global warming potential (GWP); acidification; eutrophication; abiotic resource use; pesticide use; land requirement and extracted water use to enable a comprehensive life-cycle inventory (LCI) of the environmental burdens and resource use to be established.

- Capture global best practice and scientific outputs, provide information and technical support on buildings and related technologies, such as precision farming, that help producers find practical solutions on air and water quality, energy use, and compliance with legislation.
- Where knowledge gaps exist, commission field trials or research to address these gaps. Seek partnership opportunities to share costs and exploit benefits from projects which will bring value to the English pig industry. Continue to be responsive to emerging issues including the provision of quick responses (e.g. concrete slat issues).
- Work in partnership with other divisions of AHDB to streamline and improve advice to maximise the benefits from straw, slurry and manure.

2. Protect the Environment.

Objective: Help pig producers and processors comply with existing and emerging legislation and achieve recognition for progress made.

Activities	Outcomes	Targets and Monitoring
<p>Technical support for businesses on environmental impact assessments, planning, regulations, air and water quality, energy, and environment control or compliance eg IED/IPPC. WFD, EPR, IMS sustainable livestock production sub-group.</p> <p>Use results of BPEX and other research to challenge established data and standard factors where this is outdated and detrimental e.g. nitrates leaching, ammonia and odour</p>	<p>Protect businesses from regulatory burdens and restriction through access to streamlined guidance and tools which make processes easier to understand and complete.</p> <p>Better use by industry of data for assessing farm level impacts as required for regulatory compliance and impact assessments</p> <p>Develop better regulation, regulatory implementation, guidance and advice</p>	<p>Positive feedback from levy payers in confidence survey and attendance forms at events.</p> <p>BPEX Website content reviewed quarterly. Important new content added within 1 week of receipt.</p> <p>Response to 3 Public consultations</p> <p>Participation in at least 2 stakeholder events of direct importance to the pig sector.</p> <p>Input to the development of 3 pieces of guidance or communication material</p>
<p>Technical support for efficient management of buildings and facilities and investment in new facilities and technologies (e.g. ventilation, thermal management, building design, precision farming) drawing on global best practice for new approaches to pig housing and production technologies. Adaptation of findings to industry needs and communication.</p>	<p>Increased investment in new facilities and technologies leading to better technical performance and increased sustainability.</p> <p>Successful implementation of better practice and fuller exploitation of new technologies</p>	<p>Involvement with 5 units investing over £100K in new facilities or technologies through direct regional team activity.</p> <p>Contribute on “Environment” stream topic area at 1 – 3 events per year and to 12 technical publications.</p> <p>20% increase in visits to BPEX Website Environment Hub</p> <p>Increase in demand for further service provision from farmers</p>
<p>Life Cycle Assessment - Development of AHDB Resource Use Efficiency Calculator</p>	<p>Standardised approach to Life Cycle Assessment (LCA) and estimation of resource use efficiency.</p> <p>Capacity to make meaningful global comparisons on LCA and demonstrating industry progress.</p>	<p>Delivery of AHDB Resource Use Efficiency Calculator as per contract timelines</p>
<p>Delivery of Environment Roadmap and engagement with UK and international environmental policy and regulation development for pig industry eg Greenhouse Gas Action Plan.</p>	<p>Better regulation.</p> <p>Generate market advantage from demonstrating sustainability lead of English pig production.</p>	<p>Demonstrate engagement with Government and its agencies on significant areas of implementation of new or existing legislation.</p>

<p>Through Buildings Forum and regional technical forums engage with industry to inform, prioritise and co-ordinate knowledge acquisition and demonstration activity for pig farms and allied industry.</p>	<p>Effective engagement between levy payers and allied industry expanding the range available to meet future building and technology needs.</p> <p>Demonstration and adoption of new technologies</p>	<p>Identification of a key improvement developed with BPEX support.</p>
<p>Cogeneration of new knowledge to address key environmental issues through on farm trials on priority areas such as reducing emission levels of ammonia and odour, leaching of nutrients and surface water impacts attributed to outdoor pigs.</p>	<p>Knowledge cogeneration and adoption improving environmental sustainability of businesses.</p> <p>Up-to-date information from relevant research or field trials on pig farms for impact assessments.</p>	<p>5% improvement demonstrated using AHDB resource use efficiency calculator on 5 units involved in co-generation activities.</p> <p>75% levy payer awareness of BPEX environment activity.</p>
<p>Provide advice and guidance on cross sector issues such as straw, slurry, soil management and promote tools that support and deliver advice.</p>	<p>Advice tailored to the needs of individual businesses delivered within an integrated package that focuses on the value of resources such as straw and slurry to business and on improving financial performance and resilience.</p>	<p>Showcase BPEX products and services at Grassland and Muck 2014 and Pig and Poultry Fair</p>

3. Enhance Pig Welfare

Objective: Help pig producers comply with existing and emerging legislation and achieve recognition for progress made.

Maintaining consumer confidence in the reputation of English pork will be underpinned by a commitment to continuous improvement in pig welfare that is economically sustainable. We will continue to advance the use of animal-based welfare indicators to evaluate management practices and rearing environments and help identify opportunities to improve pig welfare and production efficiency and reassure consumers. We will also help the industry to guard against unnecessary regulation through the monitoring of emerging legislation and provision of scientific data where required.

To achieve this we will:

- Deliver the implementation of Real Welfare in conjunction with AFS, NPA and PVS. We will provide the infrastructure for data collection, interpretation and dissemination back to producers and their vets. We will provide training for vets and producers as required
- Continue to review and refine Real Welfare measures in collaboration with the industry, promote the benefits of the system to our customers and build a base of firm support among producers and vets.
- Further develop the BPEX Real Welfare website with targeted advice on achieving high welfare in any husbandry system, capturing global and local research and best practice focussed on the five iceberg indicators assessed in Real Welfare (to include information on solutions to tail biting and docking).
- BPEX will provide technical support on the practical implementation of regulation, such as, Welfare of Animals at the Time of Killing, and engage with Government, EU, industry and NGOs on technical evaluation and impact assessment of emerging welfare regulations. Limitations of information currently available in existing research on pig welfare will be identified and solutions developed where required.

3. Enhance Pig Welfare.

Objective: Help pig producers comply with existing and emerging legislation and achieve recognition for progress made beyond this.

Activities	Outcomes	Targets and Monitoring
<p>Support implementation of Real Welfare through farm assurance. Promote the use of the Real Welfare Smartphone data collection app; Coordinate provision of a bureau service. Provide training services in Real Welfare assessments</p>	<p>Producer and vet engagement with Real Welfare with measures being used effectively. Standardised approach to collection and interpretation of Real Welfare assessments.</p> <p>Capacity to demonstrate industry progress.</p> <p>Efficient infrastructure for data collection, presentation and interpretation and training of vets and producers.</p>	<p>95% of vet practices and farm staff linked to 300 units registered on the i-pig portal.</p> <p>Efficient infrastructure for collection presentation and interpretation of data for users. iPig application being used for 40% of data collection</p> <p>Bureau service meets contracted Key Performance Indicators</p> <p>New vets requiring training are trained within 3 months of application.</p>
<p>Cogeneration of new knowledge to refine Real Welfare measures in collaboration with the Real Welfare Steering Group and key stakeholders and their wider membership (where appropriate) to build a base of firm support for Real Welfare</p>	<p>Increased understanding of the value of the five measures and knowledge on to influence welfare outcome scores</p> <p>Knowledge cogeneration and adoption improving welfare on pig farms.</p>	<p>5 pig farms involved in welfare co-generation activities.</p> <p>75% levy payer awareness of BPEX welfare activity.</p> <p>5 new best practice publications on BPEX website</p> <p>1000 page visits to Real Welfare section of website.</p>
<p>Support for industry in responding to and implementing new regulations assisting businesses and Government agencies in interpretation and evaluation of impact of new legislation on welfare and production efficiency. Engagement with development of UK and EU pig welfare policy.</p>	<p>Smooth implementation of new regulation with appropriate training and skills development.</p> <p>Impact assessment of new regulation and technical input into development.</p>	<p>Engagement with Government and its agencies on significant areas of implementation of new or existing legislation.</p>

4. Encourage Safe and Traceable Pork

Objective: Help producers and processors produce pork that continues to be safe and which consumers can have confidence is fully traceable from farm to finished product.

Management of food safety risks and high standards of traceability are key to reducing risk and maintaining consumer confidence. Managing potential food safety risks at farm level can be managed as part of an overall programme that also simultaneously addresses pig health and productivity. We will help the industry to manage food safety risk, improve traceability and use veterinary medicines in a recognised responsible way.

To achieve this we will:

- Support individual processors and their trade associations through the monitoring assessment and where necessary engagement with UK and EU policy makers on the implementation of new regulations such as the revision of meat inspection, amendments to regulations on microbiological criteria for Salmonella on pig carcasses and regulations regarding Trichinella spp. in pigs.
- Work with FSA and industry partners to streamline Food Chain Information to permit effective risk profiling that will minimise red tape.
- Implement a 3 year roadmap for the provision of reliable CCIR information on post-mortem slaughter lesions back to producers. We will ensure that the flow of quality information is maintained while this roadmap is being implemented.
- Co-operate with AHVLA and co-ordinate producer and processor involvement with the Defra-funded field based study of control measures for Salmonella on pig farms and their effect on endemic disease and productivity.
- Develop and implement a **One Health** approach with producers and vets that demonstrates cost-efficient benefits from interventions for health, food safety and production efficiency. Effective integrated health strategies will lead to reduction in expenditure on therapeutics while maintaining or enhancing production efficiency and reducing food safety risks.
- Support the RUMA (Responsible Use of Medicines in Agriculture) Alliance on industry strategy for responsible antimicrobial use and on replacement, reduction and refinement of usage through health planning and tools to monitor and benchmark usage.
- Engage with AHVLA on the development of an integrated surveillance plan to monitor new and emerging high impact diseases that present a risk to pig and/or public health and to long-term business sustainability eg African Swine Fever, highly pathogenic strains of PRRS and Porcine Epidemic Diarrhoea.
- Operate a programme of SIRA (Stable Isotope Reference Analysis) testing of pork, bacon and ham that will enhance the existing paper based traceability and auditing process used in the BMPA schemes that underpin the Red Tractor.

4. Encourage Safe and Traceable Pork. Objective: Help producers and processors produce pork that continues to be safe and which consumers can have confidence is fully traceable from farm to finished product.

Activities	Outcomes	Targets and Monitoring
<p>Provide industry with the capacity to monitor traceability using Stable Isotope Reference Analysis (SIRA)</p>	<p>Consumer confidence in provenance of British pork. Capacity to demonstrate labelling compliance.</p>	<p>Complete 4 cycles of testing of at least 30 retail samples plus the required follow up sampling. Expand the SIRA database by 75 farms.</p>
<p>Develop Collection and Communication of Inspection Results (CCIR) with processors, Food Standards Agency as a reliable source of health information.</p>	<p>CCIR used as a source of information on trends in lesions by vets and farmers.</p>	<p>25% increase in proportion of farmers and vets using CCIR to monitor trends in health information.</p>
<p>Cogeneration of new knowledge through farm trials to generate, adapt and demonstrate knowledge to reduce food safety risks. Application through field trials and adaption and/or demonstration of new knowledge and techniques eg AHVLA R8 project</p>	<p>Knowledge cogeneration and adoption improving whole chain safety and traceability. Commercially relevant knowledge to reduce food safety risks on pig farms and in pig abattoirs identified and communicated.</p>	<p>25 pig farms involved in food safety co-generation activities. Assessment of the effectiveness of cleaning and disinfection in 5 abattoirs and 20 farms.</p>
<p>Work with AHVLA on the development of an integrated surveillance plan to monitor new and emerging diseases that present a risk to pig and/or public health and to long-term business sustainability eg ASF, new strains of PRRS and PED.</p>	<p>Reduced risk and potential impact of notifiable, new and emerging diseases on the pig industry.</p>	<p>Efficient surveillance approach in place from 2015 with broad industry support.</p>
<p>Develop One Health approach with producers and vets demonstrating cost-efficient benefits from interventions for health, food safety and production efficiency. Integrated with Close the Gap activities.</p>	<p>Effective integrated health strategies lead to reduction in expenditure on disease treatment while maintaining or enhancing production efficiency and reducing food safety risks. One Health approach.</p>	<p>50% levy payer awareness of One Health activity.</p>
<p>Work with Pig Health and Welfare Council, Responsible Use of Medicines in Agriculture and ZNCP Steering Group to inform, prioritise and co-ordinate policy development, knowledge acquisition and demonstration activity.</p>	<p>Better co-ordination and more efficient delivery of activity by BPEX and other stakeholders. More effective engagement with levy payers</p>	<p>Publication of PHWC annual report.</p>
<p>Support industry in implementing new regulations, assisting industry and Government agencies in development of policy on animal health and food safety and interpretation and evaluation of the impact of new regulations.</p>	<p>Smooth implementation of new regulation with appropriate training and skills development. Impact assessment of new regulation and technical input into development.</p>	<p>Demonstrate engagement with Government and its agencies on implementation of new and emerging legislation.</p>

5. Help Sell More Pork

Objective: Stimulate the demand for pork through communication of the benefits of choosing pork and securing and developing export markets.

For over a decade the BPEX marketing strategy has concentrated on differentiation, a market share strategy. As points of difference become less apparent the industry has more to gain from a market growth strategy. This will be closely linked with British quality assured production and processing which helps to deliver the price premium that British pig meat relies on. This change of emphasis will use 4 strategic dials in marketing and communications.

Rejuvenating the image of pork

Differentiating from the competition

Promoting the health benefits of pork

Communicating pork as environmentally sustainable food



We will maintain the flexibility to dial up or down resource (man hours and spend) and activity in each area. In this way BPEX will respond to changes in the industry environment and the wider consumer and political environment. The 'volume' will initially be turned up the highest on Rejuvenating the Image of Pork as this is the main focus of the strategy. Activity on Differentiating from the Competition will initially be a secondary supporting message. We will also consult with industry about developing and marketing strong points of difference as the execution of the strategy progresses.

The BPEX Board gave its final approval for the marketing team to proceed with this refocused strategy in November 2013. The plan to execute the strategy will be determined by the interaction of two opportunities.

Firstly, consulting with processors to pinpoint parts of the market and specific cuts where greatest value can be added from improved demand. This work has already started and valuable insights have been gained. This engagement will continue during the plan period.

Secondly, a greater in-depth understanding of what will motivate British consumers to change their attitudes and buying habits for pork.

More than any other meat, our relationship with pork is greatly determined by the different ways in which we consume it – from the pleasure of roast pork and crackling (a pleasure missed by the majority of those who are 50 and under who don't buy fresh pork), the comfort of bacon and eggs, the everyday fun of sausages, the Christmas cheer of a good ham to the sophistication of cured meats. This versatility is both our strength and weakness. We do not have an independent relationship with pork, instead we have a

wide and varied relationship with all its dishes, and a limited relationship if you're under 50. Because of the way pork is consumed and experienced there isn't a single entity that is 'pork'. Nor is there a 'pork' brand in the way there is for beef, for example. There isn't an over-riding health benefit associated with pork like there is with other meats e.g. beef is iron rich and good for me, chicken is lean and low in fat, which is good for me. Pork also doesn't benefit from a taste talking point, like there is with beef, lamb and even chicken. There isn't a geographical attachment that conjures positive imagery for pigs as there is with Scottish beef or Welsh lamb. The task is considerable and will take some time to develop fully.

Potential activities to be delivered under each strategic dial are outlined below. These are described in broad terms as the creative executions are still in development. It is planned to complete the creative process by March and deploy new campaigns by May 2014.

Rejuvenating the image of pork

- Over the next 3 – 5 years (resource dependent), our ambition is to create a desire for particular cuts of pork around key consumer need states and occasions. Based on business need, we aim to address the challenge of an ageing customer profile and low purchase frequency among the under 50s. We aim to get pork on the consumer protein repertoire.
- In the first year we will commence a campaign on cuts of fresh pork where there is clear opportunity to add value. We will then overlay this with consumer needs and emerging cooking trends. Early evidence suggests that this would involve 'pork for fast flavour' as a quick and healthy mid-week meal solution, such as stir fry with lean strips of pork and something around slow roasting a shoulder joint for a pulled-pork or a hog roast at home as a memorable family experience.
- Success for pork is likely to come when the dishes it appears in are growing, when food and health trends support their growth and new shoppers, cooks and eaters discover them. Consumers can have more fun with pork than with any other meat; pork is the unstuffy meat. Tonally it's the most easy going meat. Pulled pork/ hog roast, bacon, sausages, pork stir fries are much less serious than beef and much more fun than bland chicken.

Differentiating from the competition

- The "Choose Red Tractor Assured pork" message will remain important but will be dialled down in comparison to its current dominant position. The values of the Red Tractor mark, such as trust and traceability, and the importance of looking for it will be communicated as an important secondary message in all marketing outputs for the next 2 – 3 years. This differentiation message may be dialled up again towards the end of the plan period, particularly if significant points of difference emerge from the industry and consumer research.
- Significant points of difference may involve further changes in production and processing practices. If these are identified from consumer and market research then the industry might want to embark on this challenge. If this happens then BPEX will communicate this source of differentiation. We could consider commissioning a TV documentary to cover the journey of an industry reflecting on itself in the face of changing competition and deciding how to position and market itself. Jimmy Doherty could be considered as the presenter as he would bring many assets to the role, including an understanding of the perspective of a pig

farmer. We would ensure that we have sufficient editorial rights on such a programme. The pig industry has an interesting story to tell, and telling it as we're going through undoubtedly challenging situations of bringing about change, would show a modern edge to the industry and help consumers to understand more about British pig farming and the key role they play in expressing what they want and in following through in their buying choices. It would also bring a time impetus to the industry to go from a reactive position to a proactive one.

Promoting the health benefits of pork

- Tracking of consumer attitudes to pork indicate that we face a considerable challenge regarding perceptions of healthiness, despite the scientific reality that pork is low in fat and contains important nutrients. We will develop a greater understanding of this mismatch between perception and reality and over the next 5 years we will reduce the health barriers to buying pork.
- We will continue to seek the advice of the Meat Advisory Panel (MAP) members. In year one we will move from a largely response mode with MAP comments, to a proactive mode. We will aim to get to a place where we can create positive and credible scientific news about the nutritional profile of pork and to put the industry in a position where we have a stronger evidence base from which to communicate the benefits of pork. We will look into this in year 1 and propose solutions in time for the planning phase of year 2. Any such solution is likely to need to be a collaborative one, involving discussions with potential funding organisations and organisations with a similar interest.
- We will be opportunistic about utilising the momentum of discussions in the public space or initiatives in their infancy that are of relevance to getting more people in the under 50 age group to enjoy pork.

Communicating pork as an environmentally sustainable food

- The focus on feeding a growing world population with limited resources is raising questions about the sustainability of production of pork. Pork has a good story to tell on environmental sustainability. We will form an advisory group similar to the Meat Advisory Panel (MAP) on meat and health, focusing on the environmentally sustainable profile of pork. Nigel Penlington will form a key role in facilitating this group of environmental experts. There will be coordination between MAP and the environment advisory group such as common membership of someone authoritative such as Professor Robert Pickard. Questions from the media and consumers often come with a dual concern or angle: health and environment and it appears that journalists and consumers are forming judgements by balancing the profile of pork as a healthy meat alongside pork as an environmentally sustainable food.
- Our ultimate goal is to create measurable changes in consumer perceptions and later, behaviour. Our ability to deliver changes at scale will depend on the skills and attitude of the team and the scale of marketing budget, alignment of message at every consumer touchpoint (including packaging and point of sale) and quality of creative message (impact, relevance & capacity to motivate). As well as tracking key sales metrics we will also monitor particular intermediate attitudinal measures and be sensitive to making necessary adjustments as the strategy develops.

Exports

BPEX's export programme has been key to the highly successful growth of pork exports. In the first 10 months of 2013, total pig meat exports (inc. offal) increased by 11% to 216,000 tonnes. Pork exports to non EU markets increased by 36% with China and Hong Kong the dominant markets. It is highly likely that in 2013, exports will account for almost a quarter of UK production. This success has been recognised by British producers, processors and Government, and clearly demonstrates the role BPEX can play in gaining market access, supporting industry in trade development and achieving continuing growth in exports. Most activity will be done in conjunction with EBLEX in order to reduce costs and maximise effectiveness.

To achieve this we will

- Focus on China and seek to increase both the number of companies listed to export and the range of products eligible. We need to protect the gains already made. We will maintain a national profile through a number of targeted events and shows in support of exporters. We will also maintain contacts at industry and official level. We will contribute along with other AHDB sectors to joint funding an official in the Beijing Embassy who will concentrate on growing UK agricultural exports.
- Consolidate other Third Country markets where access has been obtained. This includes market development in South and West Africa, Japan, Korea and Australia. In addition there will be attendance at strategic trade shows and support to attending exporters.
- Work with Defra to get access to priority markets of commercial interest as decided by the industry. These will include Russia, Taiwan and Thailand. We will continue to contribute to the UK Export Certification Partnership.
- We will help the industry exploit the potential for the export of premium British processed pork products such as sausages, bacon and pork pies. This includes both market access and trade development work focusing on South East Asia and smaller niche markets in North America.
- We will provide an appropriate scale of support for the promotion and development of pig genetic exports

5. Help to sell more pork

Objective: Stimulate the demand for fresh pork through communication of the benefits of choosing pork and securing and developing export markets.

Activities	Outcomes	Targets and Monitoring
<p>Rejuvenation of fresh pork as a tasty, nutritious and fun meat to eat by making 'light' and 'medium' consumers wonder why e.g. they aren't buying the world's favourite meat.</p> <p>Our intention is to achieve this through two major pieces of activity over a 3 year time frame (see below)</p>	<p>Fresh pork starts to permeate onto the under 50's consumer shopping agenda as a meal solution, stimulating desire and demand for pork e.g. perhaps starting in street food and restaurant experiences and progressing towards cooking in the home</p>	<p>% Attitudinal shift in perceptions of pork</p> <p>% increase in penetration of pork</p>
<p>1) Rejuvenation of pork as the meal associated with memorably great fun, all inclusive (i.e. including the cook!) family gatherings at a specific time of year by positioning the shoulder cut as the hog roast to have at home or as pulled pork</p> <p>Over a 3 year time frame we aim to establish hog roasts as the nation's fastest growing, most loved family dish</p>	<p>An association begins to be developed between home hog roasts and relaxed family gatherings, that could become an annual occasion</p> <p>A mindset shift from seeing roasts as expensive and labour intensive to great value and the easiest way to get the ultimate family experience (time out with family, returning to scrumptious food – the ultimate in convenience)</p>	<p>% Attitudinal shift by segments of target audience – increase in awareness and propensity to consume</p> <p>% Behavioural change e.g. purchase of hog roast once per year</p>
<p>2) Rejuvenation of pork as a meal solution for quick, healthy and great value mid-week meals by working with processors and retailers to present pork as a tasty and convenient way to deliver fast flavour e.g. lean pork strips for a stir fry</p> <p>Also considering meatballs or mince ...</p>	<p>Fresh pork seen as a meal that fits with today's mid-week under 50s lifestyle and a fulfilling choice</p> <p>Supply chain provide lean and healthy looking pork strips for stir fry presented as a viable alternative to chicken breasts/ strips and achieve some improved carcass balance and carcass value</p>	<p>% Attitudinal shift by segments of target audience – increase in awareness and propensity to consume</p> <p>% Behavioural change e.g. purchase of pork for mid-week use once per year among defined target</p>
<p>Rejuvenation of fresh pork as a protein that makes sense to include as part of a healthy, environmentally sustainable and balanced diet by promoting and defending the health/nutrition and environmental benefits of pork</p> <p>NB. A discussion needs to take place between AHDB meat sectors and other organisations with an interest in producing meat to look at the feasibility of commissioning research into unanswered questions on the consumption of meat and the health benefits of meat/ red meat, so that the meat industry can get on the front foot on the role of red meat as part of a healthy diet</p>	<p>Consumer perceptions of not considering pork as a healthy meat are challenged</p> <p>Consumer perceptions of pork as an environmentally sustainable meat are tracked and managed</p> <p>Consumers start to see fresh pork as part of a healthy diet (year 3)</p>	<p>e.g. Independent and credible spokespeople quoted in X% or articles commenting accurately on pork and its nutritional value and sustainability profile</p>

<p>Provide RT assurance as a secondary message in all communication outputs about pork, including on pack e.g. augmented reality</p>	<p>Maintain prompted consumer awareness of RT</p>	<p>Get retailers and processors to adopt the RT logo on pack with augmented reality function</p>
<p>Galvanise the pig industry into action to agree on proactive points of difference on which we market British pork</p>	<p>Start of a 2 – 3 year process to take the industry from reactive marketing of their produce vs the competition to proactive marketing</p>	<p>Develop and agree approach to this challenge</p> <p>2 meetings with industry representatives to scope out potential points of difference that give consumers reasons to stay loyal to British pork in the face of cheaper competition</p>
<p>Export Market Access – work with Government and Third Country authorities to open new markets and increase access in existing markets. Inward and outward technical missions and inspection visits to agree certification of products and plant approvals and work with exporters to ensure that requirements are met.</p>	<p>Finalise the protocol for pig's feet to China and to make progress on extending the list to cover other 5th quarter products. Complete the questionnaire and risk assessment stage for pigmeat products. In addition seek to reach agreement on the export of pork to Russia.</p>	<p>i) listing of trotters for China ii) completion of questionnaire and risk assessment for pigmeat products for China iii) agreement on export for pork to Russia</p> <p>Progress monitored quarterly.</p>
<p>Export Trade Development – organise trade missions and participate in targeted trade events and shows (ideally combining these two activities) in non-EU markets. Trade shows continue to be an effective trade facilitation tool especially in third countries such as China. Part of this work will include targeting the export of added value pork products</p>	<p>Increase in exports to non-EU markets, including an increase in the export of pork products.</p>	<p>i) 20% increase in exports to non EU markets, monitored quarterly.</p> <p>ii) Positive stakeholder feedback from participation in event and shows organised and attended.</p>

