



**KEPAK**

more than meat

Dr Julie Finch, Farm For the Future – Business Workshop  
9 November 2022



# 50<sup>+</sup>

Years of meat craft.  
We're leading the way



# 4.5K

Team members across 43  
countries, Global footprint,  
family ethos



# 13

Manufacturing facilities in  
Ireland (9 sites) and the UK  
(4 sites)



# 3

Primary processes; Beef,  
Lamb and Pork



# £1.5BN

REVENUE



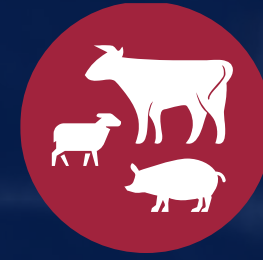
# UK SUPPLY

- 250,000 cattle / annum  
~5,000 cattle / wk
- ~1m lambs / annum  
15~25,000 lambs /wk
- ~6,000 producers – ALL FA
- Network of buyers & collection centres





# WHAT WE OFFER



FRESH MEAT



FOOD SERVICE



CONSUMER  
FOODS



**KEPAK**





# FRESH MEAT EU CUSTOMERS

Over 100 Blue Chip Retail and Foodservice Customers in Europe



# Operating in a VUCA Environment

- Volatile
- Uncertain
- Complex
- Ambiguous

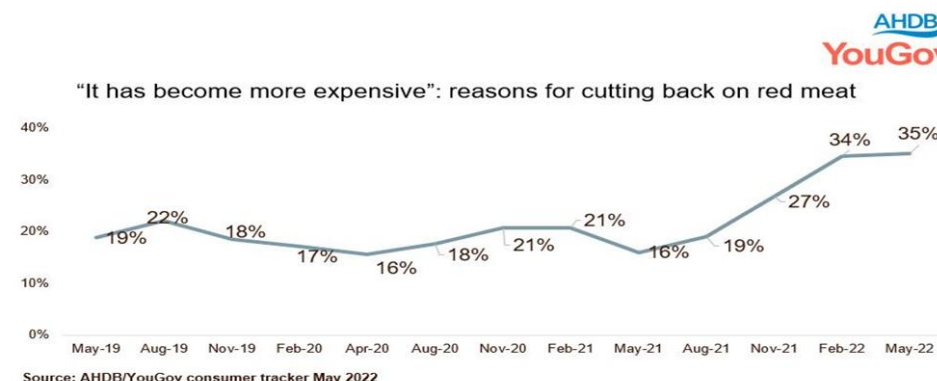
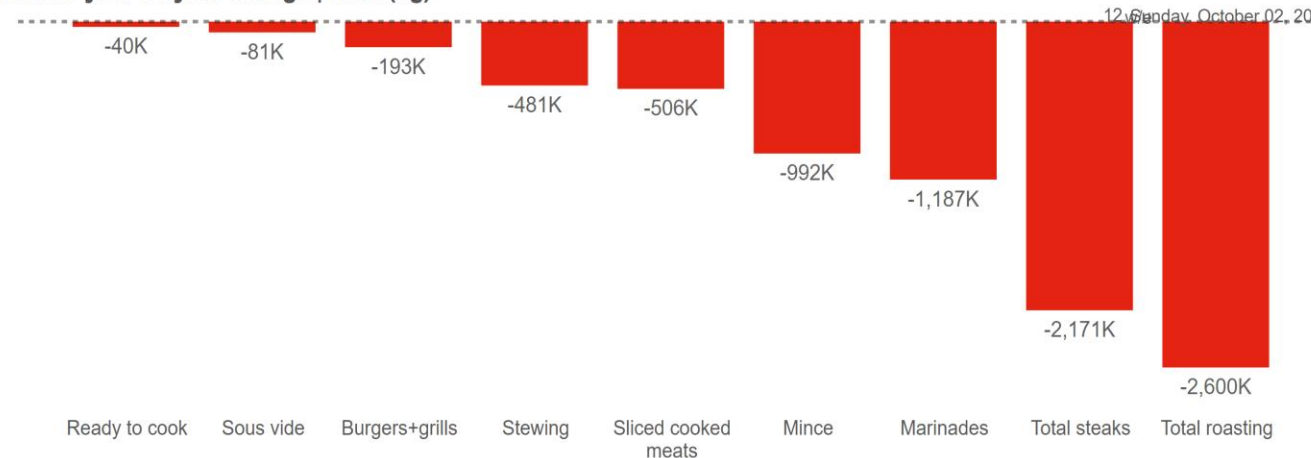


## MACRO ISSUES

There are a broad range of macro issues to navigate



Volume year-on-year change | Beef (kg)



# Operating in a **VUCA** Environment

- Volatile
- Uncertain
- Complex
- Ambiguous



## MACRO OPPORTUNITIES

But there are also macro trends that present opportunity



HEALTH & WELLBEING



ENGAGING EXPERIENCES



RESPONSIBLE LIVING



LIFE LOGISTICS



COMMUNITY & IDENTITY



# CONSUMER TRENDS



## BUSIER LIVES

During Covid, scratch cooking flourished.

Post-lockdown life is busier than ever - more people moving to convenient and assembled meals

Desire for meat sold in different formats to provide low effort, yet tasty meals



## HEALTH & WELLBEING

7/10 consumers claim to try to lead a healthy lifestyle – 'health' a driver of food choice

Demand for healthy without compromising taste draws shoppers to products that deliver on both.

Meat can deliver many benefits



## CUISINE LED

Shoppers move away from protein centred dishes and embrace 'world foods'.

Global flavours help keep unconscious meat reducers engaged with the category and increase carcass utilisation.

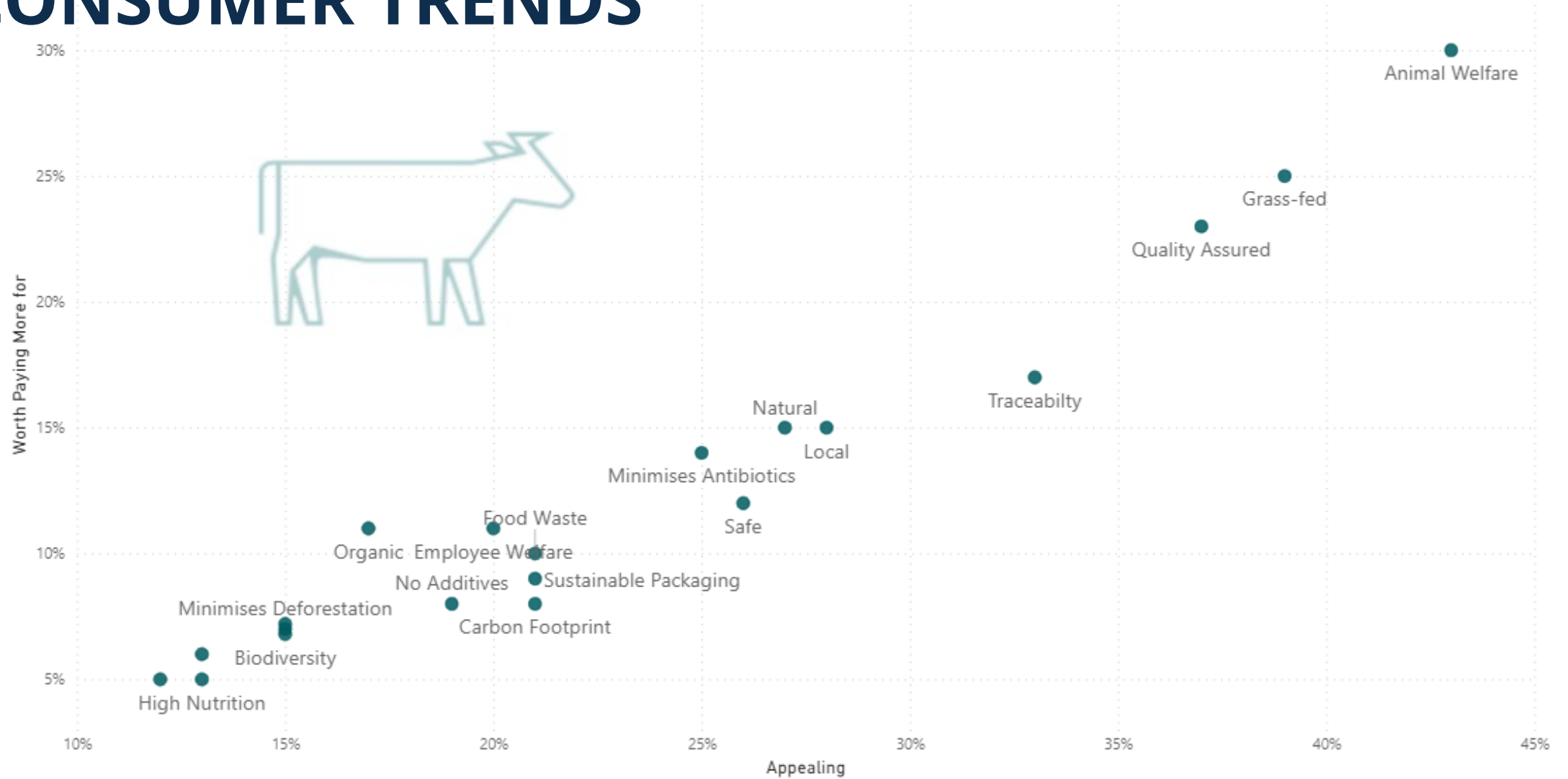




# CONSUMER TRENDS



RESPONSIBLE LIVING



- **Sustainability** key to maintain Meat as a relevant category
- Global Demand for Animal Protein with strong sustainability credentials will continue to grow
- Retailers and Processors look to securing **sustainable** supply

# CONSUMER TRENDS

- People want to know everything about their food
  - will switch spending to brands and businesses that feed this need
  - Security, trust, taste
- **Product and brand authenticity** - ever more critical proof point with consumers searching for up-close truths that are real
- Meat satisfies a complex number of needs and behaviours while navigating a complex number of trends



VALUE SEEKING



BUSIER LIVES



HEALTH



CUISINE-LED



SUSTAINABILITY

Local  
Transparency  
Legislation

# Meeting Consumer & Customer Demands

---

Evidence of sustainably produced beef & lamb.....

**Customers**

Robust claims  
Evidence based



**Farmers**

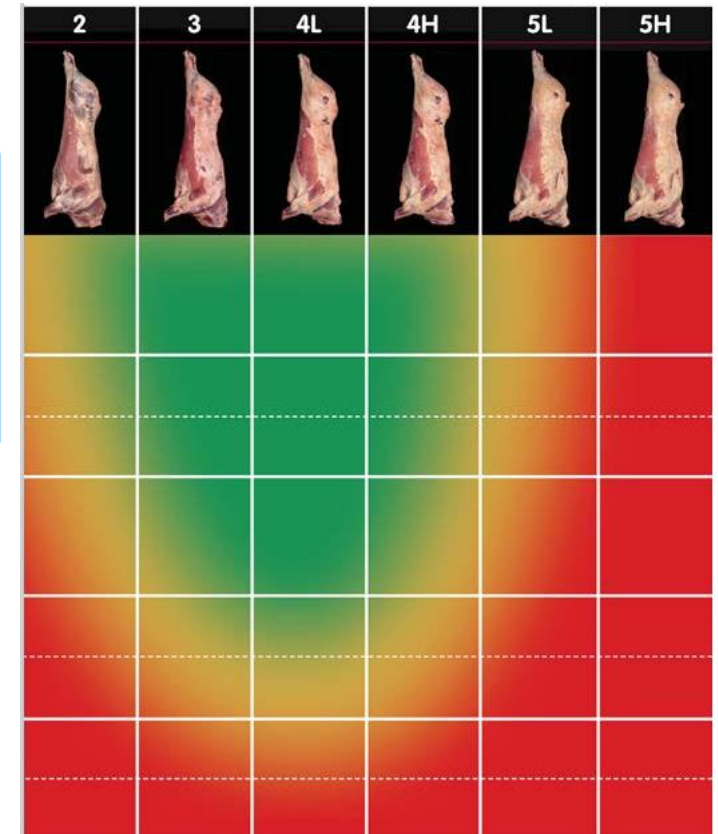
Less paperwork  
Less data burden

**Processors**



# Meeting specification

- **EUROP GRID – targets specification**
  - **Weight, conformation, fat**



- **Targets returns**
- **Reduces waste – further processing**
- **How you get there is important.....**

# Should be a Win : Win

---

THE SCOTTISH  
**Farmer**

PREMIUM

**It is hard to be green when you are in the red**

25th May 2019

**Productivity + Efficiency = Economic viability + Sustainability**

**Win: win – same on-farm measures (KPIs)**

***How you achieve those for your farm***

**No one size fits all**

# Win:Win Higher Thornton Farm, Exeter

**Chris & Sarah Berry - tenant farmers**  
**450acre mixed beef, sheep & arable**  
**900 ewe Highlander flock**  
**65 cow Aberdeen Angus Suckler herd**

- **Set-stocking to rotational grazing**
- **Herbal leys & brassicas**
- **Elite sheep genetics**
- **Outdoor lambing**
- **Stock finished/sold entirely off grass**



**Input savings (fertiliser and concentrates) >£45,000/year**

**Equivalent carbon saving of 156tCO<sub>2</sub> per year - a definite win : win!**





Thank you