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Agricultural Outlook Forum

Presented: February 17, 2006

WHAT WILL WE DO TO GET THE BEEF MARKET BACK?

Phil Seng  
CEO and President  
U.S. Meat Export Federation

# Recovering International Beef Markets

**Philip Seng**  
President & CEO  
U.S. Meat Export Federation

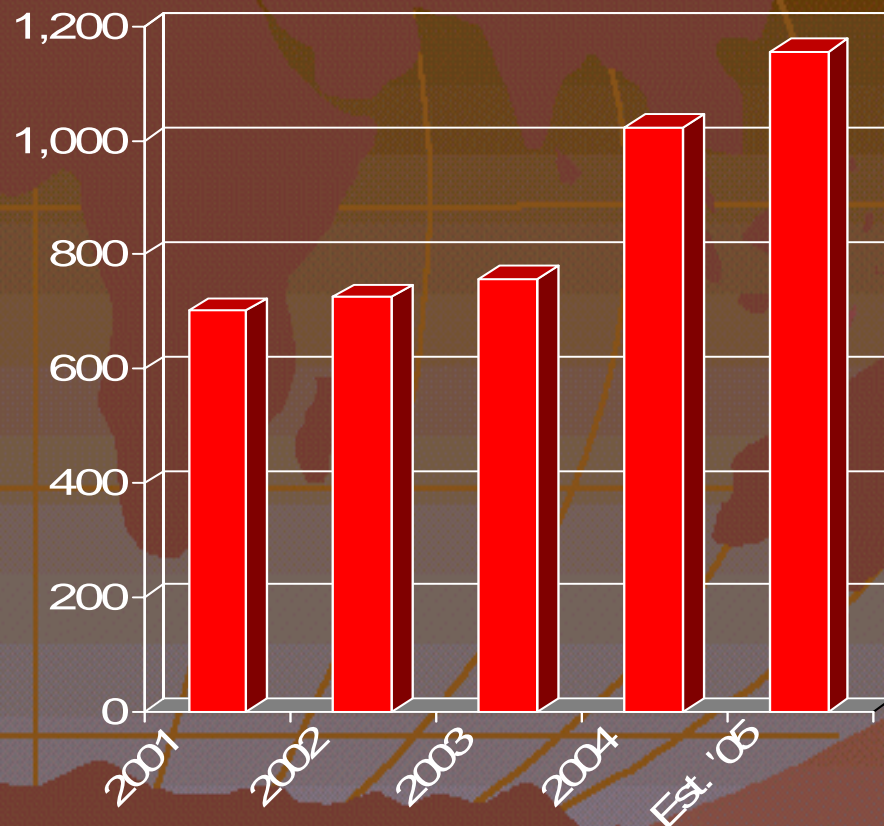


Putting U.S. Meat On The World's Table

# Pork Current Status

- Another record year:
  - Estimate about 1.1 million metric tons
  - Worth more than \$2.6 billion
- 15 straight years of growth

U.S. Pork & PVM Exports  
(1,000 MTs)



Putting U.S. Meat On The World's Table



# Pork Highlights

- Some substitution for U.S. beef early
- Primary growth factors:
  - Positioning of U.S. chilled pork as a premium product – Japan, Mexico and Korea
  - Consistent source of specific cuts
  - Good value, safety and consistent quality



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# Pork Program Funding

- \$3.9 million from pork checkoff for programs and implementation
- \$5.1 million from MAP for pork programs
  - Up from \$4.7 million for '04/'05 due to increased allocation of MAP funds to USMEF by FAS.



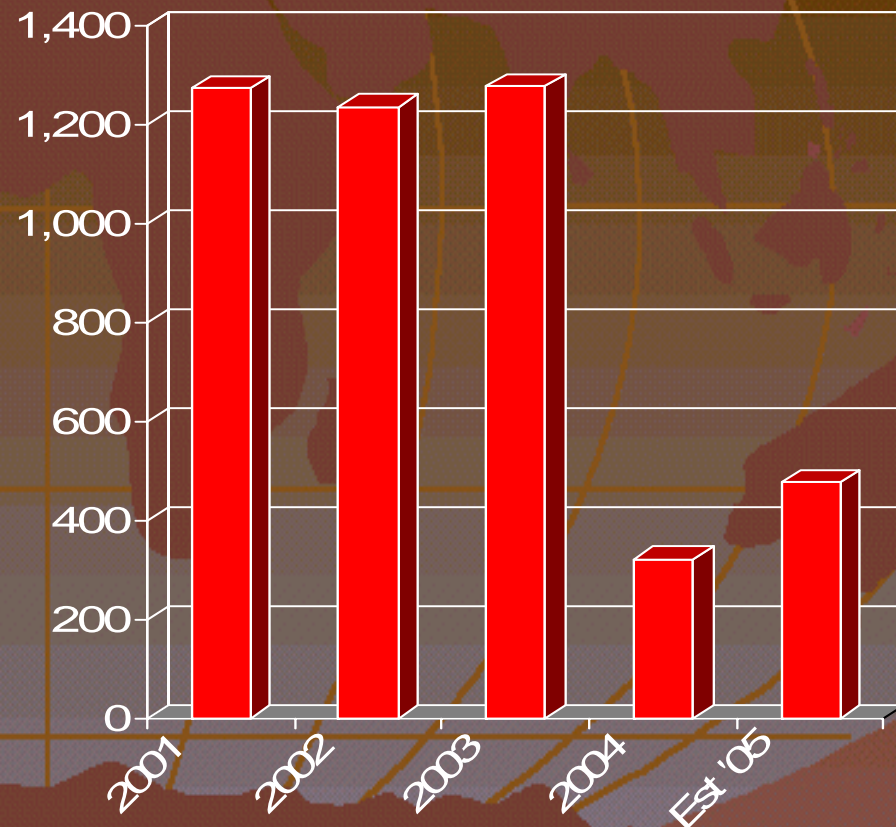
Putting U.S. Meat On The World's Table



# Beef Current Status

- 133 countries imported U.S. beef in 2003 and prior years.
- 72 instituted bans in late December 2003.
  - 27 markets currently closed to U.S. beef.
  - Of those that have reopened, access is usually limited.
  - Six markets accounted for 90% of '03 exports; three remain closed.

U.S. Beef & BVM Exports  
(1,000 MTs)



Putting U.S. Meat On The World's Table

# Making Progress

- Evidence of progress:
  - Consumer surveys, except for Japan, are showing increasing %'s of consumers who view U.S. beef as safe and would consider purchasing U.S. beef. (Ipsos)
  - Uptake of U.S. beef has been rapid in markets where U.S. beef has regained access.
  - Underutilized/value cuts are central to strategy in many markets (i.e. Caribbean, Central America, ASEAN).



Putting U.S. Meat On The World's Table



# Beef Program Funding

- \$7.1 million from beef checkoff for programs and implementation.
- \$6.8 million from MAP for beef programs
  - Up from \$4.9 million for '04/'05 due to increased allocation of MAP funds to USMEF by FAS.
- Approximately \$700,000 of state beef council, soybean, corn funding about to be allocated to relaunch efforts.



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# Beef Program Examples



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# Middle East

## -- Relaunch in Egypt --

- High Quality Beef
  - four major hotels and six high-end restaurants in Cairo.
- Liver
  - Distribution expanded from wet markets to major retailers.
  - Marriott's JW Steakhouse reporting 2X sales since September introduction.



Putting U.S. Meat On The World's Table



# Mexico & Caribbean

## -- Chefs' Competition --

- More than 300 chefs participated in the competition:
  - 225 in Mexico
  - 100+ in Caribbean
- Competition continues to garner interest of top chefs and media.
- Will move to every other year event after '06.




Putting U.S. Meat On The World's Table



# Vietnam


## -- Chef Training & Promotions --



**THỊT BÒ MỸ**  
MIỀNG NGON AN TƯỢNG

**Nguồn giống và chăn nuôi**

Phần lớn thịt bò Mỹ đều có nguồn gốc từ bò Texas Longhorn, giống lai giữa bò Anh với bò Scotland như dòng Hereford và Angus. Giống bò mới nhất là "Brangus" – giống lai giữa dòng Angus và Asiatic Brahman. Hầu như mọi tiểu bang ở Hoa Kỳ đều tham gia vào ngành công nghiệp chăn nuôi gia súc. Những tiểu bang có khu vực nuôi bò lớn nhất là Texas, Nebraska, Iowa, Kansas, Oklahoma, Colorado và California. Các nhà chăn nuôi của Mỹ chú ý vào môi trường thiên nhiên vì bò đặc biệt thích cỏ và các loại ngũ cốc xay như bắp, mì, đậu nành với liều lượng được kiểm soát bằng máy tính. Chương trình cho ăn dựa trên độ tuổi và trọng lượng, kéo dài 100-120 ngày cho đến khi bò cần năng lượng 500kg. Cách chăm sóc này tạo cho miếng thịt bò hấp dẫn đặc biệt từ màu sắc, vân mỡ đến kích cỡ cũng như hương vị thơm ngon. Nghiên cứu di truyền gần đây cũng cho thấy những giống bò ngày nay cho thịt nhiều nạc hơn các giống bò vào năm 1950.



**Chất lượng & cách xẻ**

Thịt bò Mỹ được công nhận toàn thế giới với các vân mỡ đặc trưng và cách xẻ thịt, chế biến rất đặc biệt. Thịt bò cũng phân loại theo hệ thống chọn lọc và phân loại chất lượng được quy định nghiêm ngặt, do Bộ Nông Nghiệp Hoa Kỳ kiểm soát và chuyên viên kiểm định USDA thực hiện.

Thịt bò được phân thành 3 loại "Prime", "Choice" và "Select", ứng với mỗi loại là mức độ vân mỡ khác nhau tạo nên độ mềm, màu sắc tươi và hương vị khác nhau.

85% thịt bò Mỹ được xếp loại "Choice".

Chất lượng được xếp loại theo mức từ 1 đến 5 với mức 1 biểu thị tỷ lệ cân nặng nhất giữa thịt, mỡ và xương.

**Giá trị dinh dưỡng**

Thịt bò Mỹ là thực phẩm giàu chất bổ dưỡng, cung cấp một lượng lớn các chất dinh dưỡng thiết yếu và một lượng calorie tương đối nhỏ. So sánh với thịt gà có cùng trọng lượng, thịt bò chứa Vitamin B12 nhiều hơn gấp 9 lần, chất sắt nhiều hơn gấp 2 lần và chất kẽm nhiều hơn gấp 4 lần. Hầu hết chất sắt trong thịt bò thuộc dạng "heme", dễ dàng hấp thụ vào cơ thể người cao hơn 5-10 lần so với chất sắt có trong các nguồn thực phẩm khác. Một miếng thịt nạc trung bình cung cấp chỉ có 8% lượng calorie và cholesterol cần thiết cho cơ thể đồng thời chỉ có 9g chất béo, trong đó chưa đến phần nửa chất béo này là bão hòa. Tuy vậy khẩu phần này lại đáp ứng khoảng 45% lượng protein cần thiết cho nhu cầu hàng ngày của cơ thể.

**Chúng ta nên chọn thịt bò Mỹ?**

- Chất lượng ổn định và tốt nhất do có sự kiểm soát chặt chẽ và hệ thống phân loại chất lượng, sản lượng chi tiết.
- Chất lượng hảo hạng và đảm bảo an toàn vệ sinh thực phẩm nhờ vào công nghệ tiên tiến và hệ thống kiểm soát nghiêm ngặt của chính phủ.
- Hương vị đặc đáo, thịt mềm ngọt và giá trị dinh dưỡng cao nhờ kỹ thuật chăn nuôi chuyên sâu với chế độ ăn đặc biệt hướng đến một mục tiêu duy nhất là lấy thịt.
- Cung ứng đảm bảo, nhanh chóng với sản lượng lớn và phương pháp phân phối tiên tiến.
- Thịt được xẻ thành phần thông dụng và tiện lợi cho giao dịch do có kỹ thuật xẻ thịt đặc đáo.



U.S. MEAT EXPORT FEDERATION  
39 Tyrwhitt Road, 3rd Floor Suite  
Singapore 207539  
Tel: (65) 6732 4255  
Fax: (65) 6732 1977  
Email: singapore@usmeat.org  
Website: www.usmeat.org




Chef training programs and menu promotions have helped drive exports to Vietnam to \$8 million in 2005 – making it one of the top 10 export markets.



Putting U.S. Meat On The World's Table

# Japan

## -- Consumer Communications --

- Intended to provide assurances to consumers of the safety of U.S. beef and create an environment among consumers conducive to the re-introduction of U.S. beef.
- Brochures, print advertising, Website, advertorials and TV.



Putting U.S. Meat On The World's Table



安心・安全アメリカン・ビーフ

FARM to TABLE  
アメリカン・ビーフが食卓に届くまで

「食の安全」を、食卓に届くまで

知って安心  
**BSEの  
ホント**

文庫発行 出版 自由

あなたのアメリカン・ビーフ マニア度をチェック!!

90%  
アメリカン・ビーフが食卓に届くまで

60%  
アメリカン・ビーフが食卓に届くまで

30%  
アメリカン・ビーフが食卓に届くまで

Farm to Table

お肉の本場だから安全にこだわっている

アメリカの肉は安全なの？

肉質はからにいいの？

美味しい食べ方は？

アメリカン・ミート 情報

私たちの決意。

食卓の裏面を守ることは、何よりも大切なこと。  
その裏は、どの国であっても変わらないはず。  
日本の皆さまが心から安心して  
アメリカン・ビーフを選んでいただけるように、  
私たちはさらになる安全を決めて、  
さまざまな取り組みを続けていきます。

すべての人に、誠実であること。

血の安全  
対談

**BSEの「ホント」を知ることが大切です。**

正しい情報で、消費者が  
賢く判断をすることが  
必要です。

安全対策で最大の  
障壁を乗り越えるのは  
確かな信頼の安全基準は  
定められています。

科学的根拠に基づいて、  
BSEの信頼性の安全基準は  
定められています。

www.americanmeat.jp

www.americanmeat.jp

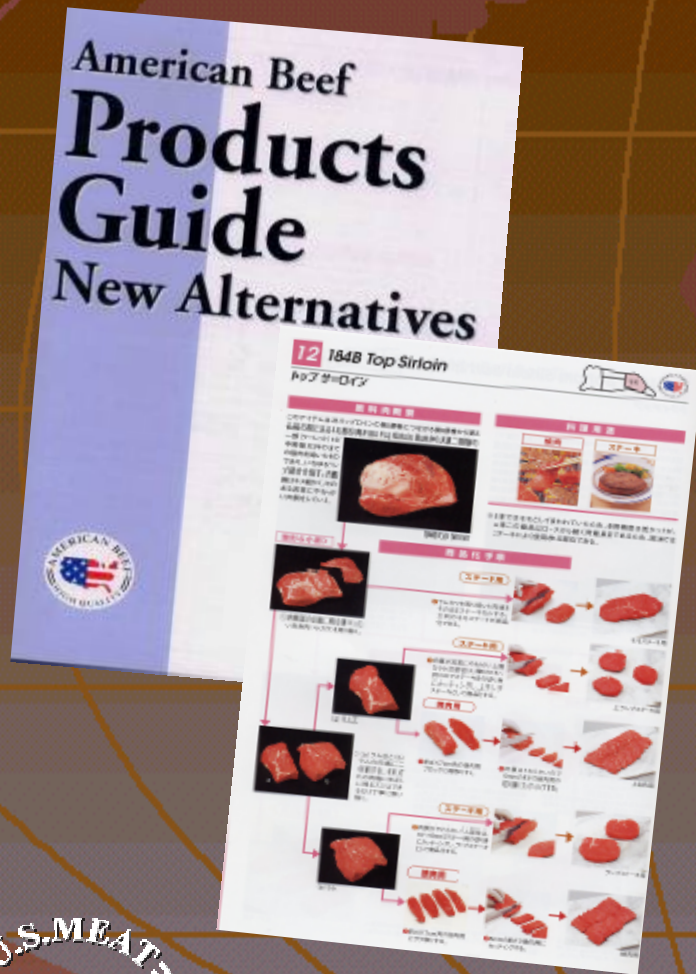


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# Japan

## -- Project J --



With beef limited to animals that meet certain eligibility requirements, USMEF helped identify and promote cuts to maximize the yield from the eligible animals.



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# Japan

## -- "Nama No Koi" Relaunch Strategy--



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# Looking Ahead



Putting U.S. Meat On The World's Table



# Mexico & Caribbean -- Chef's Competition --



Entry Form  
and Recipe  
Brochure Inside

Enjoy Caribbean-style  
recipes from the 2005  
chef finalists and find out  
how you can be a Winner.



**"THIS COMPETITION IS HOT HOT HOT !"**

**Picture Yourself a Winner**



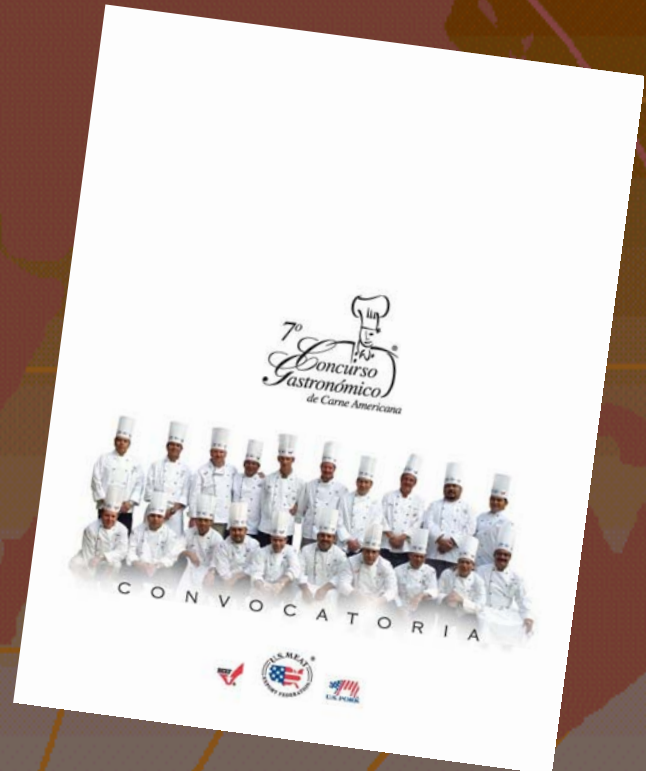
**7th Annual Culinary Contest of American Meat**

Continuation of the previous year's...  
c. The menus sent in must be original, and are necessary, without receiving them, the participant and the establishment that he/she represents will not be accepted. If there are changes or new dishes in the menus during the development of the contest, the same menus must be sent to verify the purchase of U.S. meat.  
d. Besides menus, two recipes suitable for home cooks (one beef, one pork) must be sent utilizing the following cuts: 1) Beef (Bottom Sirloin Tri-Tip (roast or steaks); 2) Pork Loin (enhanced/self-basting). Recipes should not take over 2 hours and are due upon notification that chef is a finalist.  
e. At the conclusion of the contest period (June 30, 2006), a final score will be tallied for each participant and twelve (12) finalists will be selected from the Caribbean to go to the final cook-off stage in Mexico City (August 1-4). Six (6) winners will be announced and will be eligible for the NYCA trip Sept. 19 - 27.  
f. Notification of the contest results will be sent via phone, fax or e-mail from information on the participant's registration form.

vote Jinx and Jeff Morgan, judges of the 2003-05 U.S. Meat ok, "In the Caribbean, an eclectic blend of influences from fruits, spanning fresh seafood, and dramatically prepared of our contest, we honor you, our chefs, who add color,

### 3. Score Table for Cuts

POINTS	DESCRIPTION OF CUTS ON MENU
5	<ul style="list-style-type: none"> <li>Popular beef cuts: tenderloin, ribeye or prime rib, NY strip loin, porterhouse or T-bone</li> <li>Ground meat: burgers, meat hot dogs, meatballs, sausages</li> <li>Whole Beef Top Sirloin</li> <li>Beef Offals (liver, tongue, sweetbreads, oxtail, cow feet, cheek)</li> <li>Pork offals (tail, backstraps, salt pork)</li> <li>Pork Products for breakfast: sausage, bacon, Canadian bacon, smoked sausages</li> <li>Beef Back Ribs</li> <li>Beef and Pork Latinamerican meats: roast beef, ham (cured, smoked, block 4x4, or buffet), pastrami, corned beef, pate, all dry sausage products (salami, pepperoni, mortadella, pancetta, prosciutto)</li> </ul>
+5	<ul style="list-style-type: none"> <li>Add five to any cut that is portion controlled, pre-cut or prepared by a USA company (i.e. pre-sliced pork loin = 10 points)</li> <li>Beef Flank Steak, Hanger Steak (changing Tender), Bottom Sirloin Flap, Outside or Inside Short (Tri-Tip)</li> </ul>
7	<ul style="list-style-type: none"> <li>Popular pork cuts: Loin and Ribs Chops, Tenderloin, and Fresh Leg or Carving Ham (PI Ham), Suckling Pig</li> </ul>
8	<ul style="list-style-type: none"> <li>All Pork Ribs: Spare ribs, St. Louis Ribs, Baby Back Ribs</li> </ul>
10	<ul style="list-style-type: none"> <li>Cuts from the Beef Chuck: Whole Shoulder Clod, Top Blade (Flat Iron), Shank, Chuck Eye, Deckle Meat, Stee Beef, Terne Major (shoulder tenderloin tender), Flap, Mock Tender</li> <li>Cuts from the Beef Round: Knuckle, Round or Ball Tip, Top Triangles, Bottom (Oxtails), Goose-neck, Eye of Round, Steamship Round</li> <li>Beef Top Sirloin Cap (Coulotte)</li> <li>Bone-in or Boneless Short Ribs, Rib Finger Meat</li> <li>The use of one logo: either U.S. Meat Export Federation or U.S. Pork in a menu, or clearly denoting all the U.S. Meat items with their country-of-origin or U.S. brand on the menu</li> <li>* For any pork or beef item that is value-added. Take the origin of the cut and add 10 points if it is enhanced, pre-marinated, or fully-cooked (i.e. fully-cooked bacon = 5 (bottom) 10 points=10)</li> </ul>
+10	<ul style="list-style-type: none"> <li>Any Veal or Lamb Cuts</li> </ul>
12	<ul style="list-style-type: none"> <li>Specialty Cuts: Pork Shoulder/Boston Butt, Picnic, Country-Style Ribs, Riblets</li> </ul>
30	<ul style="list-style-type: none"> <li>Beef Bottom Sirloin Tri-Tip, Top Sirloin Corner Cut, Shoulder Clod Heart (Shoulder Clod Center)</li> <li>Pork Sirloin, Picnic Cushion</li> </ul>
35	<ul style="list-style-type: none"> <li>Any All inclusive hotel which uses Fresh Breakfast (not corned beef), Beef Shoulder Clod Heart, Any Enhanced Pork Cut</li> </ul>



Putting U.S. Meat On The World's Table



# Europe

## -- Hilton Promotion --



### US Beef Recepten



#### US Beef Cooking

US Beef. Topkoks kennen het en herkennen de sublieme kwaliteit. Bij 'delicatessen-slaggers' wordt het soms aangeboden, of is het te bestellen. In de vier Nederlandse Hilton Hotels staat het in maart 2006 in veel variaties op de menukaart.

US Beef wordt geroemd om de onovertroffen malsheid, kwaliteit en delicate smaak. Het exclusieve, gemarmerde, rundvlees komt van runderen die gefokt en geslacht zijn onder streng gecontroleerde condities. De beesten grazen vrij op de prairies van ranches in de Midwest en krijgen gedurende een bepaalde tijd een uitgebalanceerd dieet van maïs (van de hoogste kwaliteit). Ze krijgen de tijd op eigen kracht, zonder groei-bevorderaars, op te groeien.

Van oudsher zijn er strenge regels verbonden aan de import van US Beef in Europa. Toen Hilton in de jaren vijftig zijn vleugels uitsloeg, was de bekende hotelketen de eerste die US beef in Europa op de kaart zette. Zo ook in Hilton Amsterdam dat in 1962 zijn deuren opende. Voor de import was een vergunning nodig van het Productschap voor Vee en Vlees. Elke zending moest opnieuw gekeurd. En zo ontstond al snel de term 'Hilton US Beef'. Tot op de dag van vandaag wordt dat begrip wereldwijd als een kwaliteitsmerk gehanteerd.

Importeur Nice to Meat nam het initiatief '50 jaar Hilton US Beef in Europa' te vieren. En daarom staan de Hilton Hotels in Amsterdam, Rotterdam, Schiphol en Soestduinen de hele maand maart in het teken van 'US Beef Cooking'.

Het vlees wordt op verschillende manieren bereid en in tal van gerechten verwerkt. In dit receptenboekje vindt u de keuzegerechten en receptuur van de Hilton Chefs. Zodat u het ongelofelijk malse rundvlees ook thuis kunt klaarmaken in verrassende variaties.

Simon Lazarus  
Hilton Amsterdam

Greg Starks  
Hilton Rotterdam

Hadi Djajapermana  
Hilton Amsterdam Airport Schiphol

Marco Groote  
Hilton Royal Park Soestduinen



Putting U.S. Meat On The World's Table



# Mexico

-- New Advertising Creative --



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# Central & South America

## -- Value Cuts --

**BEEF VALUE CUTS**  
NEW CUTS FOR THE NEW CONSUMER

**CORTES AMERICANOS MODERNOS**  
CORTES NOVEDOSOS PARA EL CONSUMIDOR NUEVO

**CORTES AMERICANOS MODERNOS**

Instrucciones para cortar Bistecs Western de caña y bistecs Western de punta de rochoy

**Origen de los Cortes americanos modernos**

**PIERNA DE RES, GANA (PLANA)**  
IMP2/NAMP 171B

**Cortes mayritlan:**  
Bistec Western de caña  
Estofado de payazo

**Valor agregado por productos**  
Payazo:  
Corneal Beef  
Bistec frito estilo campesino  
Pastrami  
Carne de res desmenuzada

**PIERNA DE RES, BAOILLA, SIN TAPA (PUNTA)**  
IMP2/NAMP 187A

**Cortes mayritlan:**  
Asado frito bull tip  
Bistecs filete bull tip  
Troccos de res para estofado  
Bistec ablandado mecánicamente  
Bistecs de sirloin de badilla  
Carne para pinchos

**Valor agregado por productos**  
Bistec frito estilo campesino (cañita inferior)  
Carne de res desmenuzada (cañita inferior)  
Carne para estofado (cañita lateral y centro)

**LOMO**

**COSTILLAR ALTO**

**PIERNA DE RES, CANTARAL**  
IMP2/NAMP 114

**Cortes mayritlan:**  
Filete Texas central  
Carne para pinchos  
California top flat  
Tiras de California top flat Teres file  
Teres file  
Teres file en medallones  
Troccos de res para estofado

**Valor agregado por productos**  
Estofado  
Carne de tapas de paleta:  
Corneal Beef  
Bistec frito estilo campesino  
Pastrami  
Carne de res desmenuzada

**PIERNA DE RES, CANTARAL, SIN TAPA (PUNTA)**  
IMP2/NAMP 114A

**Cortes mayritlan:**  
Asado frito bull tip  
Bistecs filete bull tip  
Troccos de res para estofado  
Bistec ablandado mecánicamente  
Bistecs de sirloin de badilla  
Carne para pinchos

**Valor agregado por productos**  
Bistec frito estilo campesino (cañita inferior)  
Carne de res desmenuzada (cañita inferior)  
Carne para estofado (cañita lateral y centro)

**FAJDA**

**COSTADO BAJO**

**CUARTO DELANTERO, POSTA PALETA**  
IMP2/NAMP 114

**Cortes mayritlan:**  
Filete Texas central  
Carne para pinchos  
California top flat  
Tiras de California top flat Teres file  
Teres file  
Teres file en medallones  
Troccos de res para estofado

**Valor agregado por productos**  
Estofado  
Carne de tapas de paleta:  
Corneal Beef  
Bistec frito estilo campesino  
Pastrami  
Carne de res desmenuzada

**CUARTO DELANTERO**

**CAMOTE Y FECHO**

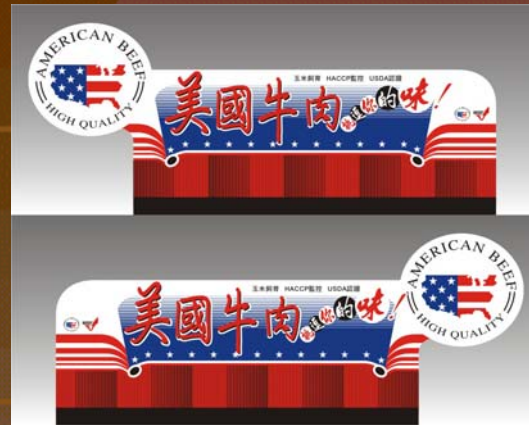


Putting U.S. Meat On The World's Table



# Taiwan

## -- New POS --



Putting U.S. Meat On The World's Table



# Korea

## -- New POS --

맛있고 영양많은  
**High Quality U.S. BEEF**

**Tasty**  
곡물사료를 먹고 자란 미국산 쇠고기는 한국인의 입맛에 딱 맞습니다.

**Safety**  
국제수역사무국 발표에 따르면, 특정위험물질은 제외한 쇠고기는 안전합니다.

**Management**  
미국산 쇠고기는 FDA, FSIS, EPA 등 미국정부산하기관의 공동감독 하에 생산되어 안전합니다.




**It's better!**

<p>High Quality U.S. BEEF</p> <p>꽃등심 등급: 프라임 (Prime) 4,500원 /100g 원산지: 미국산</p>	<p>High Quality U.S. BEEF</p> <p>등급: 프라임 (Prime) 원산지: 미국산</p>
<p>High Quality U.S. BEEF</p> <p>꽃등심 등급: 초이스 (Choice) 4,500원 /100g 원산지: 미국산</p>	<p>High Quality U.S. BEEF</p> <p>등급: 초이스 (Choice) 원산지: 미국산</p>

High Quality  
**행사상품**  
U.S. BEEF



**It's better!**








Putting U.S. Meat On The World's Table



# Hong Kong

-- New POS --



Putting U.S. Meat On The World's Table

# Where Do We Go From Here?

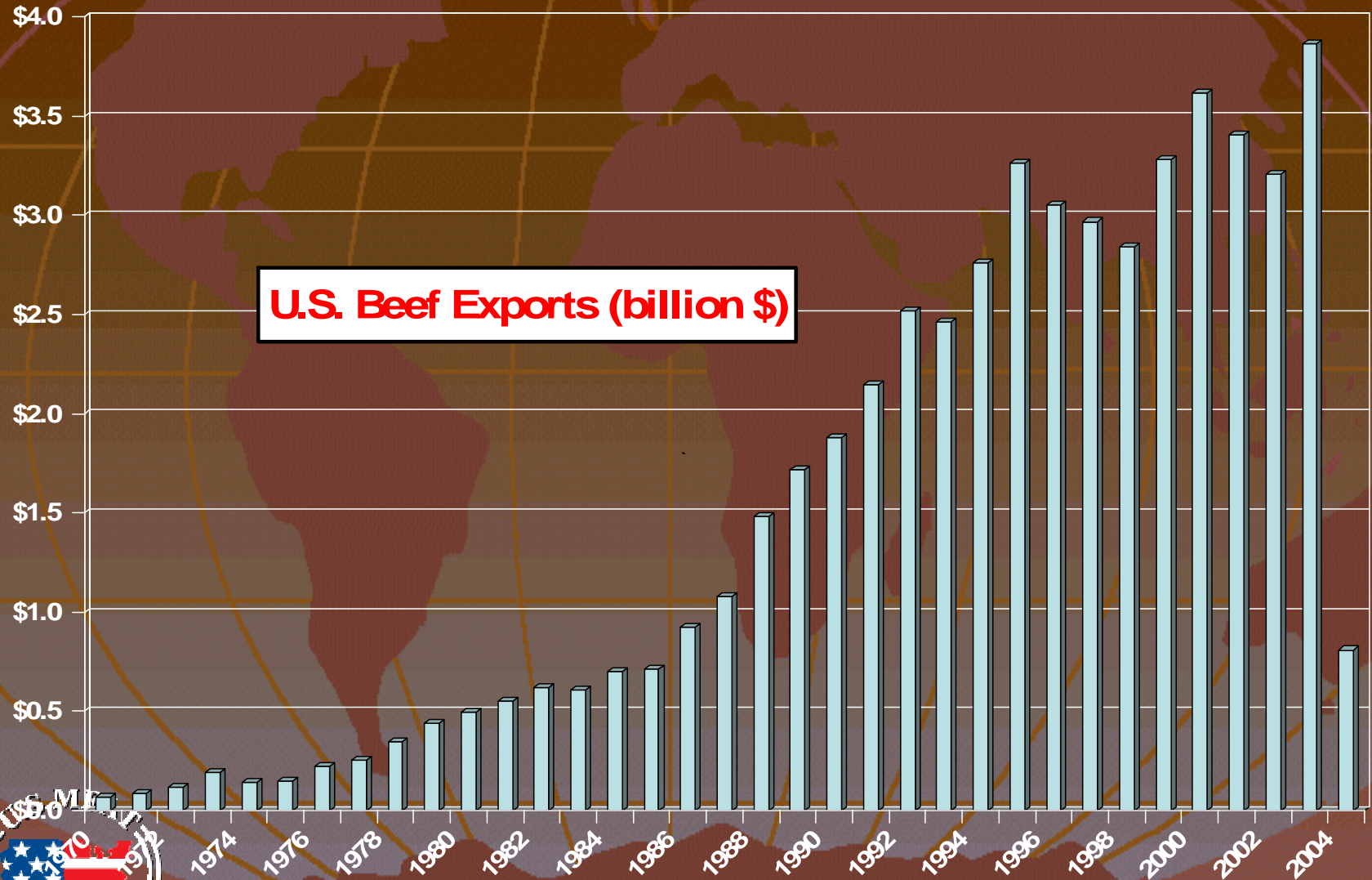
The Numbers



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# The Road We Were On

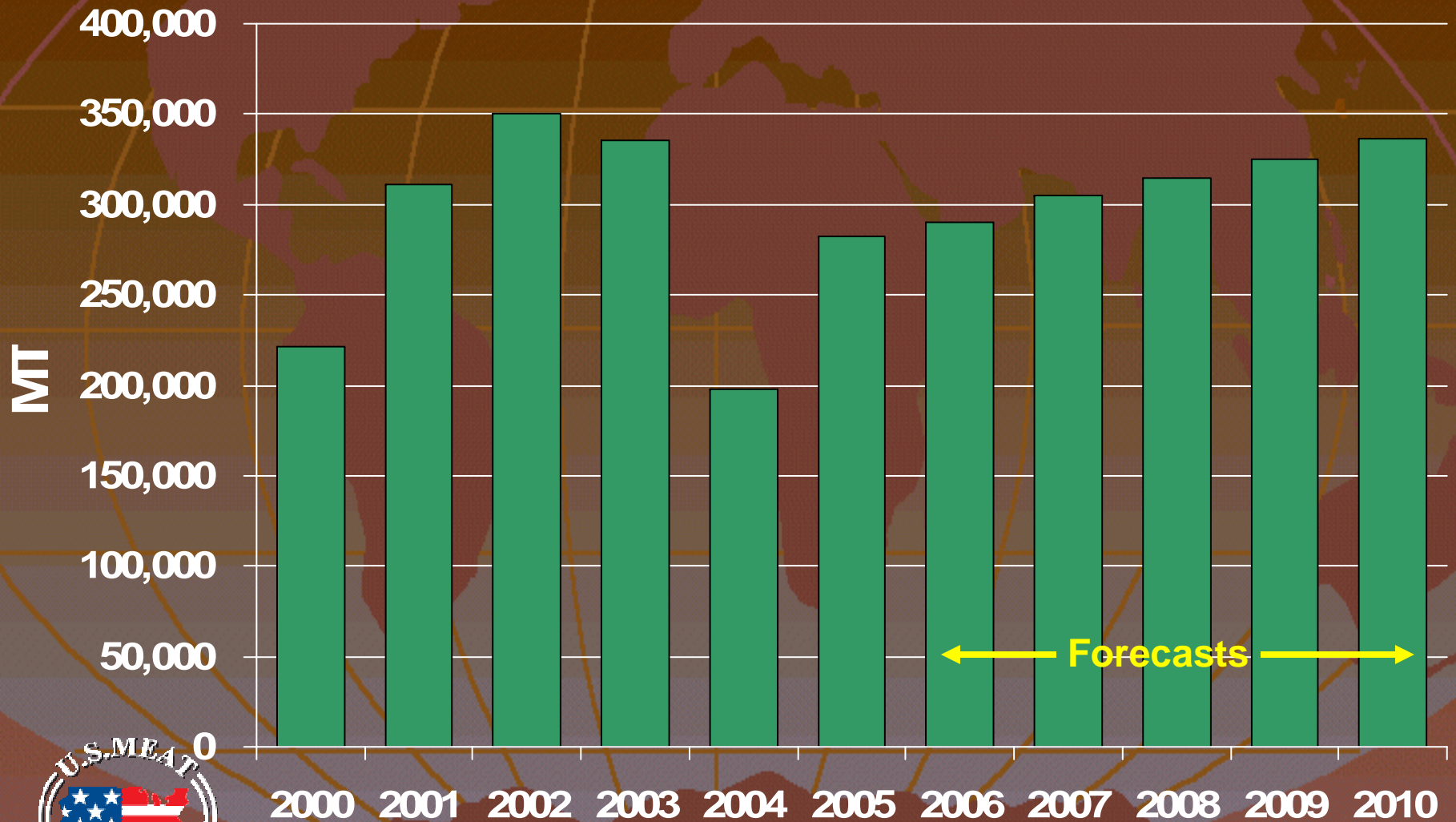


**U.S. Beef Exports (billion \$)**



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# U.S. Beef/BVM to Mexico

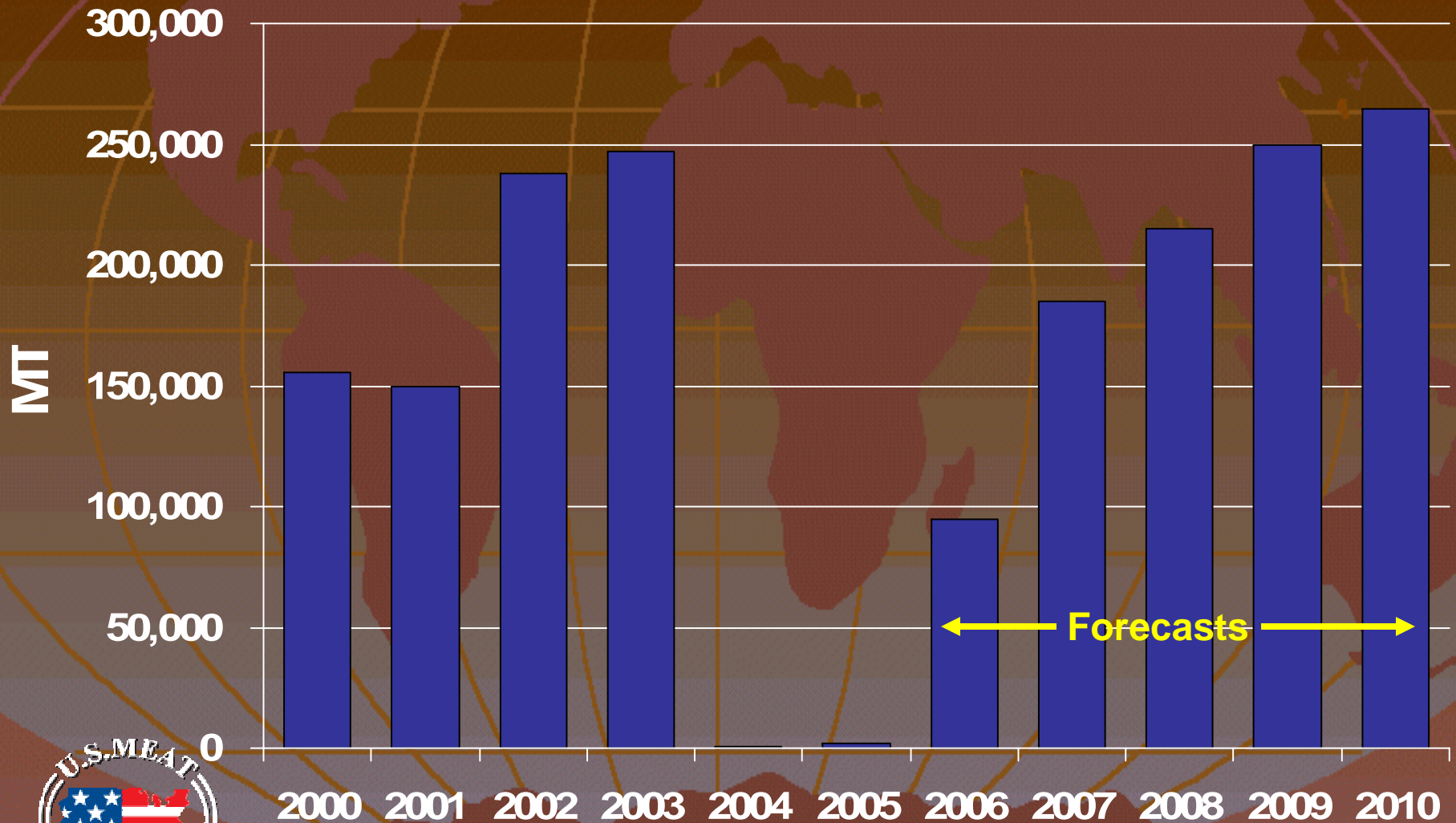


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Source: USDA / USMEF



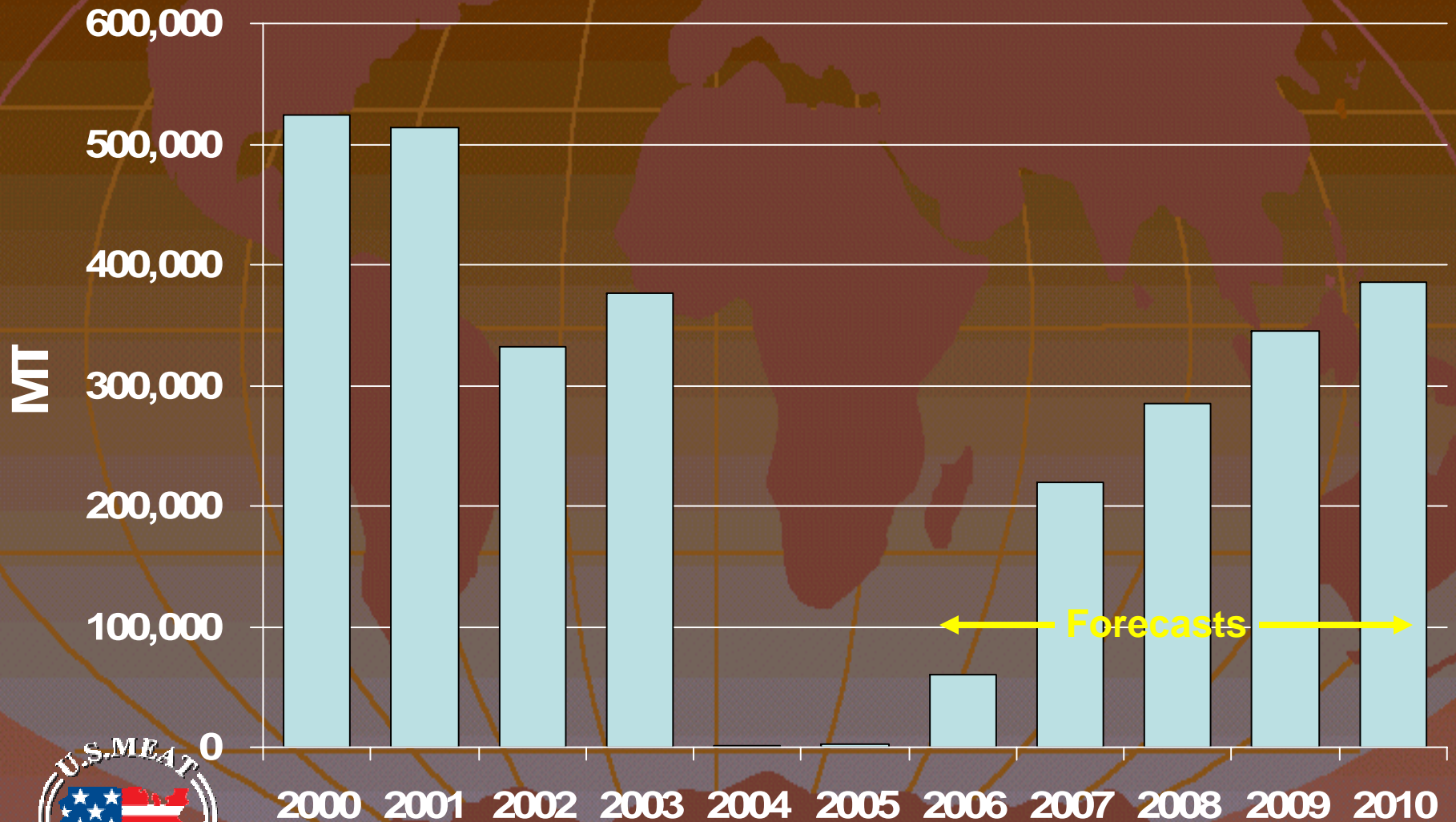
# U.S. Beef/BVM to S. Korea



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Source: USDA / USMEF

# U.S. Beef/BVM to Japan

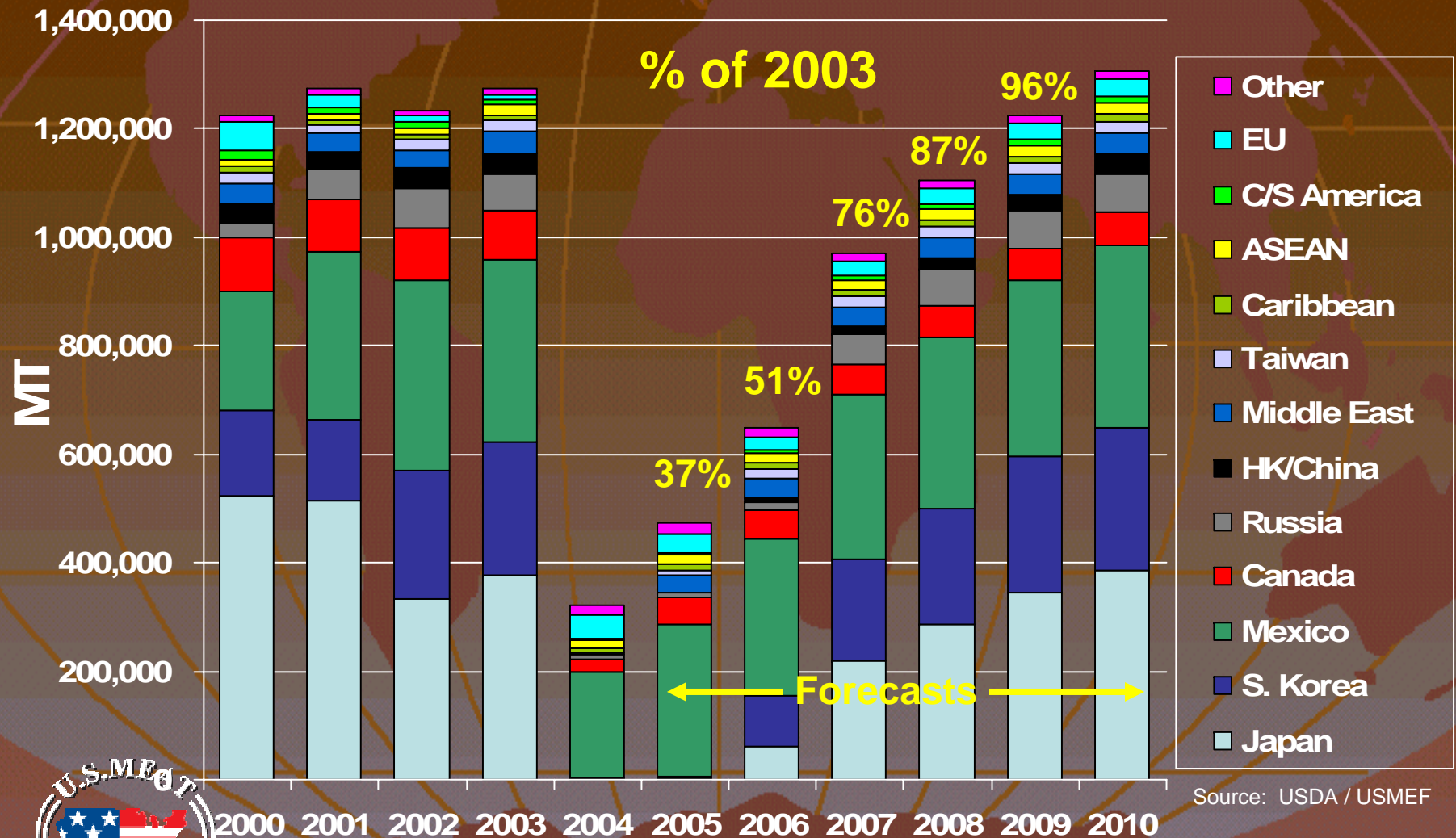


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Source: USDA / USMEF



# U.S. Beef/BVM Forecast



Source: USDA / USMEF



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# Where Do We Go From Here?

A Reality Check

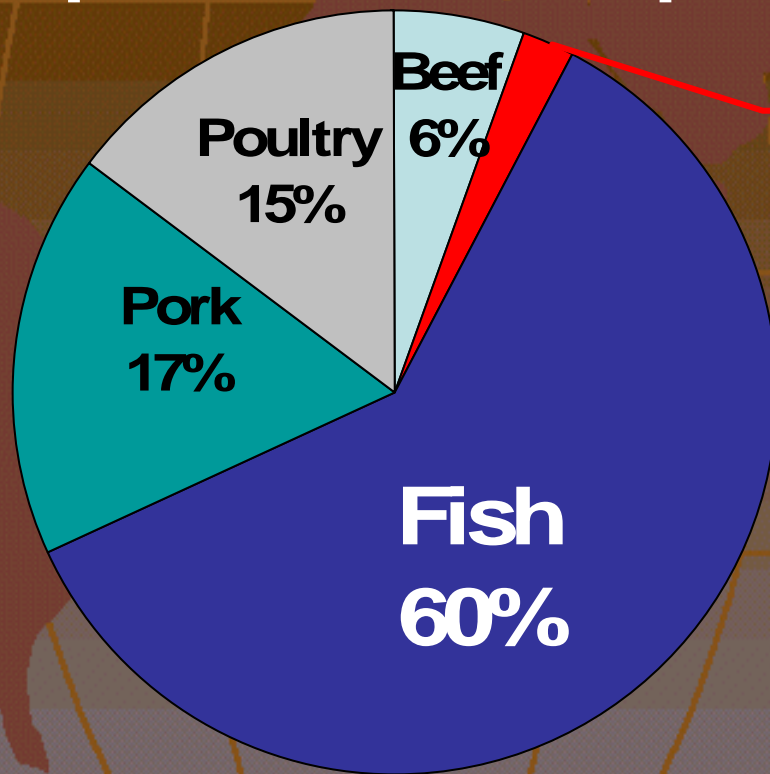


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# U.S. BSE Impact on Japanese Meat Supplies

## Japan Meat Consumption

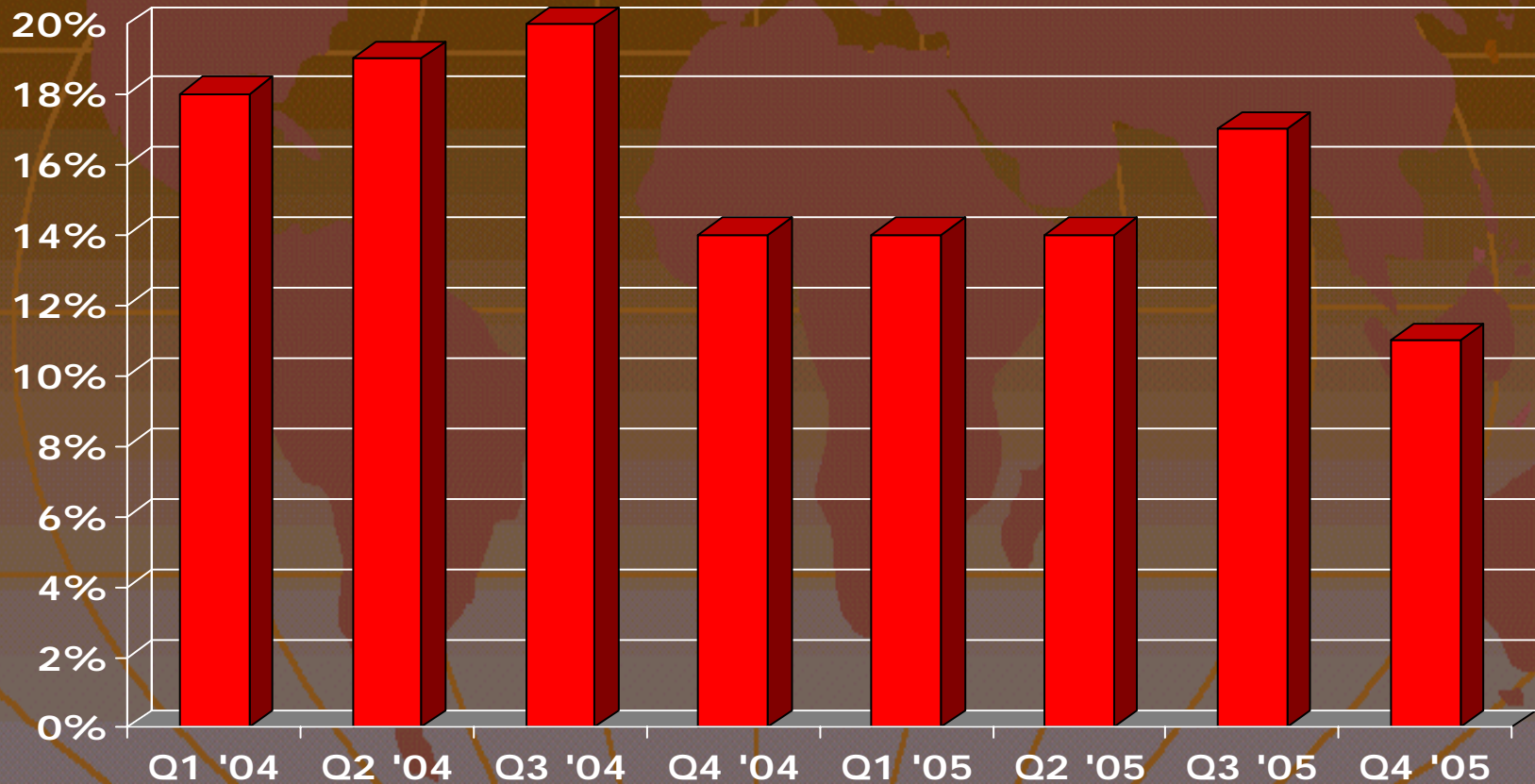


**US Beef**  
**2%**



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# Japanese Confidence in the Safety of U.S. Beef



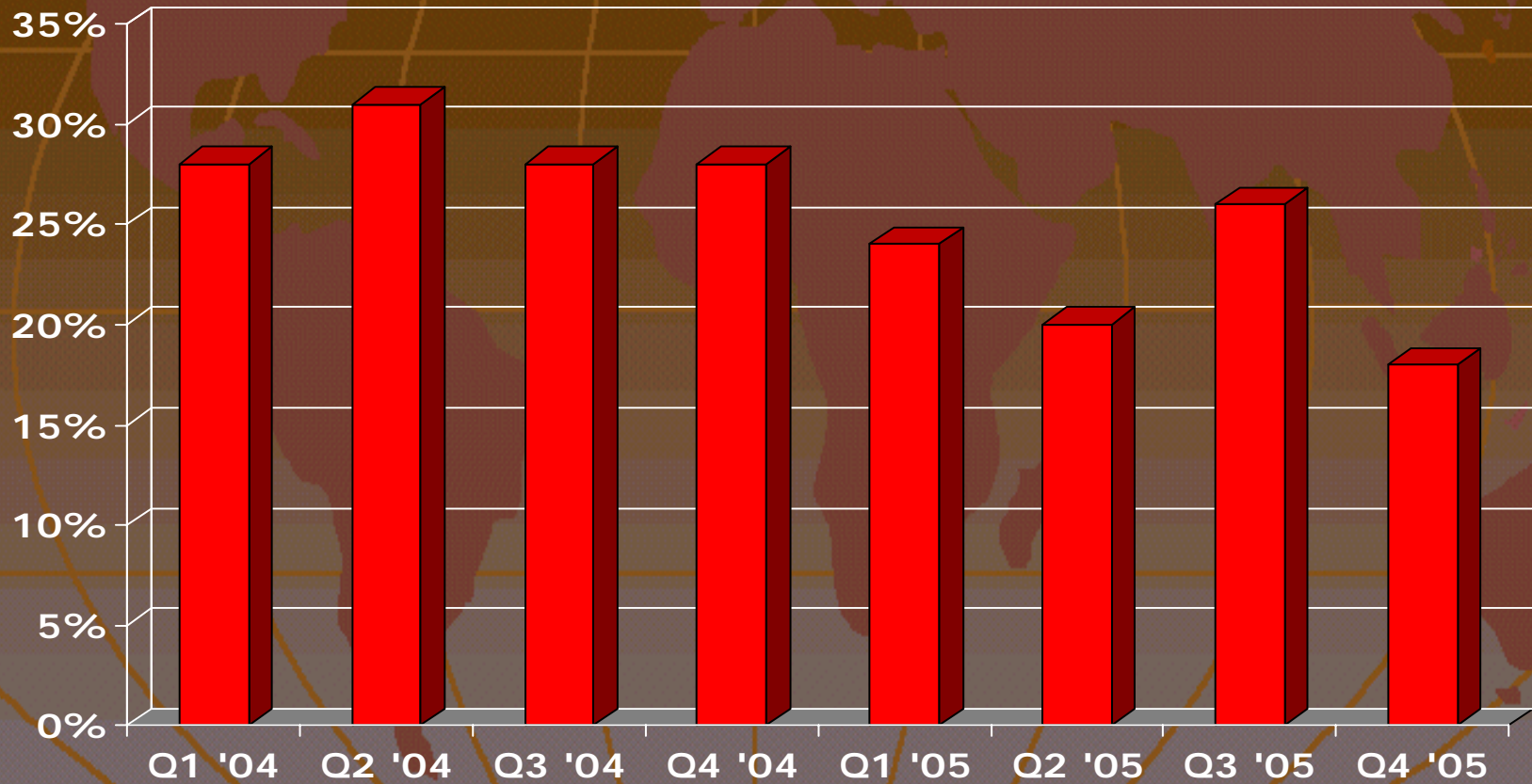
Early December



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# Japanese Comfortable Purchasing U.S. Beef

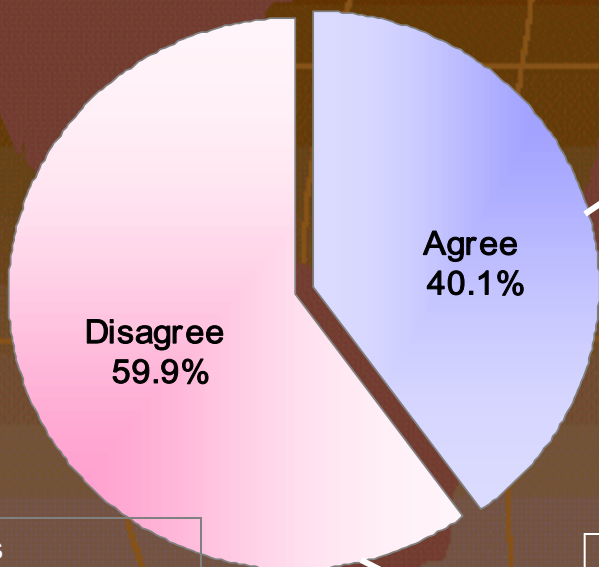


Early December



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# For/Against Trade Resumption



**【Reason for agree】 N=347**

Low price beef will be available.	65.1%
A wider choice of beef.	54.5%
Easier dining out for beef bowls and Korean barbecue.	42.9%
Improved Japan-U.S. relationship.	18.7%
Delicious beef will be available.	18.4%
No care about origin country of beef.	16.4%
Others	4.6%

**【Reason for disagree】 N=518**

Unsure about safety under the decided import conditions.	68.9%
Blanket testing of all cows, as practiced in Japan, must be practiced.	60.2%
Import resumed under political pressure from the U.S.	59.5%
In reality, the import conditions do not seem observed within the U.S.	54.4%
A vague feeling that safety is not ensured	23.2%
Others	1.9%

■References  
 Result of survey conducted by Asahi Shinbun on October, 2005;

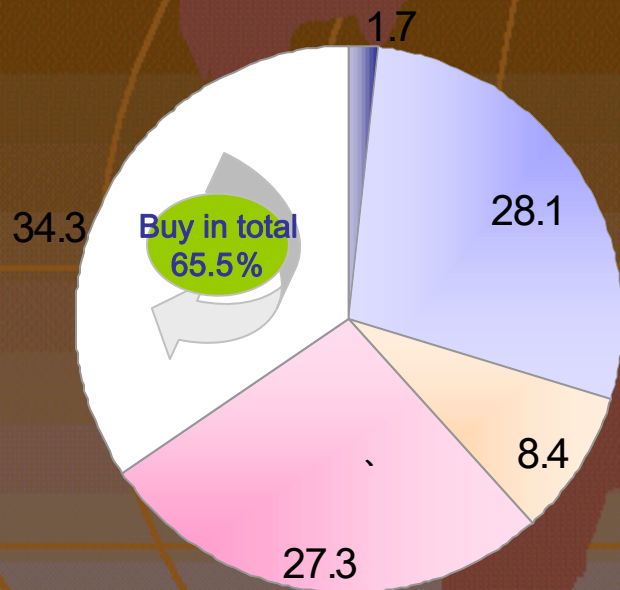
Agree : 21%  
 Disagree : 67%

Early January





# Buy/No Buy



I would buy US beef if it were on shelves at large supermarkets. 23.8%

I would buy if celebrities and academics agreed about US meet safety on TV and newspaper. 22.9%

I would buy if well-known restaurants and hotels started serving US beef. 20.1%

I would buy if many beef bowl restaurants and Korean barbecue restaurants started serving US beef. 19.3%

I would buy if shops I usually use started selling US beef. 17.8%

I would buy if traceability were confirmed. 17.8%



# Will History Repeat?



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