

2018

GLOBAL
MEAT
INDUSTRY
EXECUTIVE
ROUNDTABLE
2018-MEAT 50

M50

全球肉类产业高层圆桌论坛

2018.9.18 · 北京 Beijing



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2018 Global Meat Industry Executive Roundtable – M50
2018 全球肉类产业高层圆桌论坛-M50

I. 2018 Global Meat Industry Executive Roundtable – M50

Date/Venue: September 18, 2018 (Tuesday) 08:30 am -12:30 am
Venue: Hotel Nikko New Century Beijing · Century Hall one 世纪一厅

Organizers: International Meat Secretariat (IMS)
China Meat Association (CMA)
U.S.- China Food and Agriculture Partnership (AFP)
U.S. Trade Development Agency (USTDA)

I. 2018 全球肉类产业高层圆桌论坛-M50

日期/地点: 2018 年 9 月 18 日 (星期二) 08:30-12:30
地点: 北京新世纪日航饭店·世纪一厅

主办单位: 世界肉类组织 (IMS)
中国肉类协会 (CMA)
中美农业与食品合作项目 (AFP)
美国贸易发展署 (USTDA)

Overview

The Global Meat Industry Executive Roundtable has been co-organized by China Meat Association (CMA) and the U.S.- China Agriculture and Food Partnership (AFP) since 2016.

This year's Executive Roundtable is co-organized by CMA, AFP and the International Meat Secretariat (IMS). Invited participants include executives from the top50 global meat companies, relevant government officials, organizations, embassies, and consulates, in addition to well-known experts. China Meat Association (CMA) and AFP have expanded *this roundtable from a bilateral to a multilateral audience in order to elevate collaboration and dialogue between nations.*

Purpose/Goals

The purpose of the Global Meat Industry Executive Roundtable is to engage with top meat industry peers on market trends and discuss issues and opportunities for collaboration. It builds on previous Executive Roundtables to strengthen commercial and technical relationships. The outcomes from this meeting will provide direct feedback to upcoming programs that CMA, AFP, and partners are planning for 2018-2019. These programs are designed to 1) enhance cooperation among international, Chinese companies, and NGO/government stakeholders to ensure food safety, security and sustainability and 2) gain broader input on key areas of cooperation to advance mutual benefits for the global supply chain.

Expected Outcomes

The expected outcomes of this gathering are to 1) strengthen commercial and technical relationships; identify areas of cooperation and collaboration and 2) provide industry input to government partners about food safety and production system for meat products in China.

概况

自 2016 年起，中国肉类协会（CMA）和中美农业与食品合作项目（AFP）开始共同组织举办全球肉类产业高层圆桌论坛。

今年，本届高层圆桌论坛由中国肉类协会（CMA）、中美农业与食品合作项目（AFP）及世界肉类组织（IMS）合作举办。与会代表包括全球前 50 家顶级肉类公司高管，相关政府、组织和使领馆官员，以及知名专家等。此次论坛规模由双边拓展至多边，以实现各国间的对话与合作。

目标

全球肉类行业高层圆桌论坛旨在为顶级肉类行业伙伴就市场前沿和合作机会的交流提供平台，并在往届论坛的基础上进一步加强商业与技术关系。本届圆桌论坛的成果与经验将直接反映在中国肉类协会、中美农业与食品合作项目及其合作伙伴在 2018-2019 年的项目计划中。未来的项目致力于：1) 促进国际、中方和非政府组织及政府相关方的合作，从而保障食品安全、粮食安全与农业可持续发展，和 2) 获取关键合作领域的广泛意见以实现全球产业链的互利互惠。

预期成果

本届圆桌论坛的预期成果包括：1) 加强商业和技术关系，确定合作与协作领域，和 2) 向政府相关方提供有关中国肉类产品安全和生产体系的行业意见。

II. Agenda

II. 会议日程安排

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Timetable	Topics	Speakers
08:00-08:30	Registration	
08:30-08:55	Opening Ceremony	<p>Welcoming Remarks Moderator: Wei CHEN, Executive Vice President & Secretary General, China Meat Association (CMA)</p> <ul style="list-style-type: none"> • Shuilong LI, President, China Meat Association (CMA) • Jennifer W. Lee, Executive Director, U.S.- China Agriculture and Food Partnership (AFP) • Guillaume Roué, President, International Meat Secretariat (IMS) • Ministry of Agriculture and Rural Affairs (MARA) • Steven Winkates, Director of Program Management, East Asia Region, U.S. Trade & Development Agency (USTDA)
08:55-09:30	Overview On Global Meat Industry Development	<p>Moderator: Jennifer W. Lee, Executive Director, U.S.- China Agriculture and Food Partnership (AFP)</p> <p>Insight: Global Meat Industry Market Analysis and Interpretation: David E. Williams, Vice President of Informa Economics</p> <ul style="list-style-type: none"> • North America: Joel Haggard, Senior Vice President of U.S. Meat Export Federation, Asia Pacific Region • Europe: Jos Goebbles, President, Dutch Meat Association (COV) • Asia:Jie MA, President, CMA Importer & Exporter Branch • South America:Gunther Thofehr, Government Affairs, Brazilian Beef Exporters Association (ABIEC) • Oceania: Patrick Hutchinson, CEO, Australia Meat Industry Council (AMIC)
09:30-10:25	Panel I: How to Improve Meat Production Efficiency Through New Technology and Product Development	<p>Moderator: Wei CHEN, Executive Vice President & Secretary General, China Meat Association (CMA)</p> <p>Panel Speakers:</p>

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		<ol style="list-style-type: none"> 1. Xiangjie MA, President, Shuanghui Group - China 2. Ruibo YU, President, Delisi Group Co., Ltd. – China 3. Xibin CHEN, Chairman, Heilongjiang Grand Farm Meats Co., Ltd. - China 4. Jieming CHU, General Manager, Jiangsu Shuangyu Food Co., Ltd. - China 5. OnatBayraktar, Vice President of Food Care Asia, Sealed Air – U.S.A. 6. Charles Ling, Managing Director, Tyson Food – U.S.A.
10:25-10:35	Tea Break	
10:35-11:30	Panel II: Best Practices and Industry Standards in Food Safety	<p>Moderator: William Westman, Senior Vice President of International Affairs, North American Meat Institute (NAMI)</p> <p>Panel Speakers:</p> <ol style="list-style-type: none"> 1. New Hope Liuhe Food Co., Ltd. – China 2. Jianhua CHEN, Director & Vice President, Fujian Sunner Group Shareholding Co., Ltd. 3. Ken Petersen, Senior Vice President, Quality and Regulatory Affairs, OSI Group – U.S.A. 4. Philippe Duriez, CEO, AOSTE Group – France 5. H.W.A. Swinkels, Vandrie Group - the Netherlands 6. Juhui HUANG, Vice President of Corporate Affairs for Greater China, BRF – Brazil
11:30-12:25	Panel III: Sustainable Development in Meat Supply Chain	<p>Moderator: Joel Haggard, Senior Vice President of U.S. Meat Export Federation, Asia Pacific Region</p> <p>Panel Speakers:</p> <ol style="list-style-type: none"> 1. Wuqun HOU, Vice Chairman, Chuying Agro-Pastoral Group Co., Ltd. - China 2. Longhu ZHU, Vice General Manager of COFCO Meat & General Manager of Fresh Products, COFCO Meat Investment Co., Ltd. - China 3. Michael R. Mullen, Vice President, Global Corporate Accounts, Ecolab -U.S.A. 4. Zhinong YAN, Executive Director, Walmart

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		Food Safety Collaboration Center-U.S.A. 5. Peg Soderberg, CEO, Moving Floor AB - Sweden 6. Marc Feunteun, Export Director, SVA JEAN ROZE - France
12:25-12:35	Wrap Up & Next Steps <ul style="list-style-type: none">• Guillaume Roué, President, International Meat Secretariat (IMS)• Mr. Shuilong LI, President, China Meat Association (CMA)• William Westman, Senior Vice President of International Affairs, North American Meat Institute (NAMI)	

时间	主题内容	演讲人
08:00-08:30	签到	
08:30-08:55	开幕式	<p>主持人：中国肉类协会常务副会长兼秘书长陈伟</p> <p>欢迎致辞- 5 分钟/人</p> <ul style="list-style-type: none"> • 中国肉类协会会长—李水龙 • 中美农业与食品合作项目秘书长—李佩仪 • 世界肉类组织主席—胡儒 • 中国农业农村部 • 美国贸易发展署—东亚区项目管理主任温凯时
08:55-09:30	全球肉类产业发展概览	<p>主持人：中美农业与食品合作项目秘书长李佩仪</p> <p>全球肉类行业市场分析与解读：英富曼经济副总裁大卫·威廉姆斯</p> <ul style="list-style-type: none"> • 美洲：美国肉类出口协会亚太地区高级副主席—何嘉德 • 欧洲：荷兰肉类协会会长—约斯·戈培尔 • 亚洲：中国肉类协会进出口商分会会长—马杰 • 南美洲：巴西牛肉出口商协会政府事务总监—甘彝腾 • 大洋洲：澳洲肉类行业理事会执行总裁帕特里克·哈钦森
09:20-10:25	专题一：肉类产业技术发展和生产效率的提升	<p>主持人：中国肉类协会常务副会长兼秘书长陈伟</p> <p>专题发言人：</p> <ol style="list-style-type: none"> 1. 双汇集团河南双汇投资发展股份有限公司总裁—马相杰—中国 2. 得利斯集团有限公司总裁—于瑞波—中国 3. 黑龙江大庄园肉业有限公司董事长—陈希滨—中国 4. 江苏双鱼食品有限公司总经理—褚洁明—中国 5. 希悦尔公司食品保障亚洲区副总裁—OnatBayraktar—美国 6. 泰森大中华区董事总经理-出口业务—凌隆重—美国

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10:25-10:35	茶歇	
10:35-11:30	专题二：食品安全最佳实践经验及行业标准	<p>主持人：北美肉类协会副总裁兼国际事务的高级副总裁—魏人威</p> <p>专题发言人：</p> <ol style="list-style-type: none"> 1. 新希望六和股份有限公司—中国 2. 福建圣农集团控股有限公司董事副总裁—陈剑华—中国 3. 欧喜集团质量与法规事务高级副总裁—肯尼斯·彼得森—美国 4. AOSTE 集团执行总裁—菲力浦·杜瑞兹—法国 5. 荷兰范德利集团公司事务总裁—H.W.A. Swinkels 6. 巴西食品公司（BRF）大中华区副总裁—黄菊辉—巴西
11:30-12:25	专题三：肉类产业链的可持续性发展	<p>主持人：美国肉类出口协会亚太地区高级副主席—何嘉德</p> <p>专题发言人</p> <ol style="list-style-type: none"> 1. 雏鹰农牧集团股份有限公司副董事长—侯五群—中国 2. 中粮肉食投资有限公司肉食副总经理兼生鲜制品部总经理—朱龙虎—中国 3. 艺康集团全球公司大客户副总裁迈克尔·穆伦—美国 4. 沃尔玛食品安全协作中心执行主任—严志农—执行主任—美国 5. 瑞典 Moving Floor AB 公司执行总裁 Peg Soderberg 6. 法国 SVA JEAN ROZE 公司出口总监—Marc FEUNTEUN
12:25-12:35	<p>会议总结</p> <p>世界肉类组织主席胡儒</p> <p>中国肉类协会会长李水龙</p> <p>北美肉类协会副总裁兼国际事务的高级副总裁—魏人威</p>	

III. Introduction of Organizers

III. 主办方单位介绍

China Meat Association (CMA)



China Meat Association (CMA for short) is a national social organization registered at the Ministry of Civil Affairs of the People's Republic of China to represent Chinese meat industry.

Established in May of 1992, China Meat Association is a non-profit national social organization nationwide voluntarily initiated by meat related enterprises, public institutions, social organizations and individuals in China. CMA membership covers the whole meat industry chain, such as the fields of livestock and poultry feeding, slaughtering, meat processing, meat cold-chain logistics, meat import and export trade, meat machinery and equipment, meat and meat product ingredients, meat and meat product packing materials, also including institutes and colleges, provincial and municipal food companies, regional meat associations.

China Meat Association is the vice presidential membership of International Meat Secretariat (IMS)

CMA's Mission: Serving members, devoting to meat industry development, meeting the meat consumption demands of the people.

CMA's Functions:

Involving in Industry Management, Responding to Industry Requirements, Strengthening Industry Building, Organizing Industry Exchanges, Providing Industry Services, Coordinating Industrial Relationships, Promoting Industry Development, Protecting Member Rights, Implementing Industry Civilization, Striving for Meat Safety.

The headquarter and secretariat of China Meat Association is in Beijing. CMA has 12 Branches, which are Pork Branch, Beef & Lamb Branch, Poultry & Eggs Branch, Natural Casing Branch, Importers & Exporters Branch, Machinery & Equipment Branch, Packaging Branch, Meat Ingredients Branch, Cold-chain Logistics Branch, Meat Snacks Branch, Fermented Ham Branch, Beef and Lamb Importers Branch; 1 Specialized Committee: Meat Technology & Standardization Specialized Committee; 3 Working Committees: Complaint Mediation Working Committee, Meat Safety Working Committee, and Credit System Construction Working Committee.

中国肉类协会

中国肉类协会(简称中国肉协)是经中华人民共和国民政部批准注册登记的全国性肉类生产流通行业社团组织。英文译名 CHINA MEAT ASSOCIATION, 缩写 CMA。

中国肉类协会成立于 1992 年 5 月,是由中华人民共和国境内与肉类生产经营相关的企事业单位、社会团体和个人自愿结成的全国性、行业性社会团体,是非营利性社会组织。协会会员涵盖全国畜牧养殖、畜禽屠宰、肉类加工、肉类食品冷链物流、肉类进出口贸易、肉类机械装备、肉类食品配料、肉类食品包装等产业链各个环节,以及科研院校,省、市级食品公司、肉类协会和重点县级肉类食品企业。

中国肉类协会是世界肉类组织副主席单位。

中国肉类协会的宗旨:为全体会员服务,为行业发展服务,为满足人民群众肉食消费需求服务。

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中国肉类协会的业务范围:

参与行业治理	反映行业诉求	加强行业建设	组织行业交流
提供行业服务	协调行业关系	促进行业发展	维护会员权益
建设行业文明	保障肉食安全		

中国肉类协会总部及常设机构秘书处设在北京，协会下设12个分会：猪业分会、牛羊业分会、禽(蛋)业分会、天然肠衣分会、进出口商分会、包装分会、机械装备分会、配料分会、冷链物流分会、休闲肉制品分会、发酵火腿分会、牛人俱乐部分会；1个专业委员会：肉类科技与标准化专业委员会；3个工作委员会：投诉调处工作委员会、信用体系建设工作委员会、食品安全工作委员会。

中国肉类协会分支机构会长（排名不分先后）

Presidents of China Meat Association Sub-branches

(Listed in No Particular Order)

郑思敏

中国肉类协会猪业分会会长

得利斯集团有限公司常务董事长、党委书记

山东得利斯食品股份有限公司董事长



Simin ZHENG

President, China Meat Association Pork Branch

Managing Director and Secretary of the Party Committee, Delisi Group Co., Ltd. and the Chairman of Shandong Delisi Food Co., Ltd.

陈希滨

中国肉类协会牛羊业分会会长

大庄园集团董事长



Xinbin CHEN

President, China Meat Association Beef & Lamb Branch

Chairman, Grand Farm Group

邓成

中国肉类协会禽（蛋）业分会会长

新希望六和股份有限公司总裁



Cheng DENG

President, China Meat Association Poultry & Eggs Branch

President, New Hope Liuhe Co., Ltd.

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马杰

中国肉类协会进出口商分会会长
无锡天鹏菜篮子工程有限公司董事长兼总经理

Jie MA

President, China Meat Association Importers & Exporters Branch
Chairman & General Manager, Wuxi Tian Peng Vegetable Basket Project Co., Ltd.



褚洁明

中国肉类协会休闲肉制品分会会长
江苏双鱼食品有限公司董事长

Jieming CHU

President, China Meat Association Meat Snacks Branch
Chairman, Jiangsu Shuangyu Food Co., Ltd.



侯五群

中国肉类协会发酵火腿分会会长
雏鹰农牧集团股份有限公司副董事长

Wuqun HOU

President, China Meat Association Fermented Ham Branch
Vice President, Chuying Agro-pastoral Group Co., Ltd.

何德康

中国肉类协会天然肠衣分会会长
上海耐恰尔肠衣有限公司董事长

Dekang HE

President, China Meat Association Natural Casing Branch
Chairman, Shanghai Natural Casing Co., Ltd.



李洪久

中国肉类协会肉类食品配料分会会长
山东天博食品配料有限公司总经理

Hongjiu LI

President, China Meat Association Meat Ingredients Branch
General Manager, Shandong Tianbo Food Ingredients Co., Ltd.



刘盛儒

中国肉类协会冷链物流分会会长
济南维尔康实业集团有限公司总裁

Shengru LIU

President, China Meat Association Cold-chain Logistics Branch
President, Jinan Welcome Industrial Group Company



韩青荣

中国肉类协会机械装备分会会长
嘉兴艾博实业有限公司董事长

Qingrong HAN

President, China Meat Association Machinery & Equipment Branch
Chairman, Jiaxing Expro Industrial Co., Ltd.



宋建新

中国肉类协会包装分会会长
江阴升辉包装材料有限公司董事长

Johnson SONG

President, China Meat Association Packaging Branch
Chairman, Sunrise Packaging Material (Jiangyin) Co., Ltd.



马广胜

中国肉类协会牛人俱乐部分会会长

Guangsheng MA

President, China Meat Association Beef and Lamb Importers Club Branch

International Meat Secretariat (IMS)



The International Meat Secretariat (IMS) represents the global meat and livestock sector as a vital motor of growth and prosperity to meet the future demands for sustainable, high-quality, nutritious and safe animal protein.

The IMS is a non-profit organization that brings together members from all over the world including livestock producer associations, national and regional meat associations, meat exporter associations, meat processing companies, government, and corporate partners representing over 75% of the global production of cattle, pig, and sheep meat. The IMS is headquartered in Paris and celebrates its 40th anniversary in 2014.

The IMS engages with international standard setting bodies including the World Trade Organization (WTO), the Food and Agriculture Organization of the United Nations (FAO), the Organization for Economic Co-operation and Development (OECD) and the World Organization for Animal Health (OIE) to shape public policy and regulatory standards impacting the agri-food chain.

Through its Expert committees the IMS champions science-based solutions and policy, the need for continued innovation and better technologies, free and fair trade and sustainable business as key elements to meet the future challenges of a growing global population estimated to be 9 billion people by 2050, with the associated higher demand for high-quality animal proteins.

Finally through its global conferences and scientific symposiums the IMS provides a platform for expert dialogue to contribute to international research and facilitate scientific advancements particularly in the fields of sustainability, nutrition and animal welfare.

世界肉类组织简介

世界肉类组织（IMS）代表全球肉类及畜牧行业的利益，是推动整个行业发展繁荣的重要力量，旨在可持续性地满足人们对于高品质、营养丰富且安全的动物蛋白的需求。

世界肉类组织是一个全球性的非盈利性组织，其会员包括全球范围内的畜牧业生产商协会、国家性与地区性肉类协会、肉类出口商协会、肉类加工企业、政府以及企业合作伙伴，这些会员单位的牛肉、猪肉与羊肉产量约占全球产量的 75%。世界肉类组织的总部设在法国巴黎，2014 年迎来其四十周年华诞。

世界肉类组织与世贸组织（WTO）、联合国粮食与农业组织（FAO）、经济合作与开发组织（OECD）以及世界动物卫生组织（OIE）等国际标准制定机构通力协作，制定出能够影响整个农业食品链的公共政策与管理标准。

未来，全球人口继续增长，预计到 2050 年，全球人口总数将达到 90 亿，这意味着对优质动物蛋白的需求也将相应增长。为此，通过各专家委员会的共同努力，世界肉类组织坚持科学的政策和解决

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方案，推动持续创新和技术升级，倡导自由公平的贸易往来，促进可持续商业发展，以应对未来人口对动物蛋白需求增长的挑战。

此外，世界肉类组织通过举办全球会议及科技研讨会，为全球行业内的专家打造了一个对话平台，以促进国际研究，推动科学进步，特别是在可持续发展、营养学与动物福利等领域。

US-China Agriculture and Food Partnership (AFP)



The U.S.–China Agriculture and Food Partnership is a private-public coordinator for bilateral food and agricultural cooperation between the United States and China with support from governments in both countries. The AFP was created with the support of the US and Chinese governments to continue in the tradition of the Agricultural Symposium that was a centerpiece of then-Vice President Xi Jinping’s visit to Iowa in February 2012.

AFP’s mission is to link U.S. and Chinese public, private, and non-governmental organizations (NGO) across the agricultural and food supply chain in order to advance mutual food security, food safety, and agricultural sustainability through the promotion of cooperative activities between the United States and China and optimal practices in both countries. Since its formal establishment in September 2013, AFP has over 50 companies in its network, comprised of U.S. companies and non-profit industry cooperators. Together with Chinese industry and government partners, AFP working groups organize and coordinate cooperative activities with Chinese partners in public and private sectors from policy/technical round tables, demonstration projects, training programs, etc.

Successful programs organized by AFP include: China-U.S. Agriculture and Food Seminar at the 27th Joint Commission and Commerce and Trade attended by Vice Premier Wang Yang, Minister of Agriculture, Han Changfu, and U.S. Secretary of Agriculture, the G20 Agricultural Entrepreneurs Forum, 1st and 2nd U.S.-China Meat Industry Executive Roundtable, CFDA Senior Leaders Food Safety Training Workshop, CFDA Regulators Training U.S. Tour, National Silage Training Workshop, China Food Value Chain U.S. Tour, 2nd Beef Cattle Breeding Technical Symposium, etc.

AFP members engage in cooperative dialogue and joint projects with Chinese industry and policy makers through industry-based working groups. Current AFP working groups cover the following sectors: Seed, Precision Agriculture, Feed and silage, Livestock, Meat Processing, Retail, and distribution. The overall direction and programs of the AFP are guided by a Board of Directors, which is currently composed of nine members from the senior leadership of major organizations in the agriculture and food industry. To demonstrate the benefit of U.S.-China bilateral engagement in agriculture and food industries, AFP also issues a series of publications to document the efforts and results of cooperation between the two countries in both public and private sectors. AFP publications provide an essential platform to showcase the initiatives of AFP and its members as a reflection of the broader collaboration between U.S. and China.

中美农业与食品合作项目

中美农业与食品合作项目（AFP）是中美双边农业与食品合作的公共与私营的协调平台。该项目的建立得到了两国政府的支持。在 2012 年 2 月，时任国家副主席习近平访美国爱荷华州，由此开启了中美农业高层研讨会。该项目的建立，就是为了继续这一传统。

AFP 的宗旨，是连接两国农业和食品整个产业链上的公共、私营和非政府机构与组织，通过促进两国的合作活动以及积极实践，推进双边粮食安全、食品安全和农业可持续发展。自 2013 年 9 月正式成立以来，该项目已有 50 多家美国公司和非赢利行业机构成员。通过与中国行业和政府伙伴合作，该项目的工作小组组织和协调公私部门的合作活动，包括政策 / 技术圆桌论坛、示范项目、培训项目等。

AFP 成功组织了多个项目与活动，包括：伴随第 27 届商贸联委会举办的中美农业食品研讨会（此届联委会有汪洋副总理、农业部部长韩长赋、以及美国农业部部长参与）、G-20 农业企业家论坛、第一届和第二届中美肉类产业高层圆桌论坛、中国食药监总局高层领导食品安全培训工作坊、全国粗饲料培训工作坊、中国食品价值链美国学习考察、以及肉牛技术研讨会等。

AFP 成员与中国行业及政策制定者通过行业工作组进行合作对话、建立合作项目。目前，AFP 的工作领域包括：种子、精准农业、饲料与粗饲料、牲畜、肉类加工、零售和供应链配送。AFP 合作项目的总方向和具体项目由董事会制定，该董事会目前由 9 位来自农业与食品业界主要机构的高层领导构成。为了显示中美双边在农业与食品领域合作的优势及成果，AFP 也出版一系列材料，记录两国在公私部门合作的努力和成果。AFP 出版物呈现了 AFP 及其成员在中国的活动、以及两国在更大范围内合作的关键平台。

U.S.-China Agriculture and Food Partnership Network

中美农业与食品合作项目（AFP）网络

(In Alphabetical Order 按英文首字母顺序排列)

1. Abbott 美国雅培公司
2. AGCO Int'l GMBH 美国爱科集团
3. Alltech Biological Products (China) Co., LTD.北京奥特奇生物制品有限公司
4. American Feed Industry Association (AFIA) 美国饲料工业协会
5. American Seed Trade Association (ASTA) 美国种业贸易协会
6. American Soybean Association (ASA) 美国大豆协会
7. Aramark 爱玛客集团
8. Archer Daniels Midland Co. (ADM)美国阿彻丹尼尔斯米德兰公司
9. Asian Agribusiness Consulting 亚洲农业咨询公司
10. Bayer CropScience 拜耳作物科学（中国）有限公司

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11. Cargill Investment (China) Ltd. 嘉吉投资（中国）有限公司
12. CNH Industry(CHNI)凯斯纽荷兰工业
13. Cotton Council International 美国国际棉花协会
14. Dow AgroSciences 陶氏益农农业科技（中国）有限公司
15. Dupont Pioneer 美国杜邦先锋公司
16. Ecolab 艺康(中国)投资有限公司
17. Elanco Animal Health 美国礼来公司全球动物保健
18. Food and Agriculture Export Alliance (FAEA)美国粮食及农产品出口联盟
19. Hormel 荷美尔食品公司
20. Informa Economics 英富曼经济公司
21. International Poultry Development Program (UIPDP)国际家禽发展计划
22. JarvisMachinery Manufacture (Beijing) Co., Ltd. 查维斯机械制造（北京）有限公司
23. JBS JBS 公司
24. John Deere (China) Investment Co.,Ltd 约翰迪尔（中国）投资有限公司
25. Johnsonville Sausage, LLC 约翰逊.维尔有限公司
26. Kay Dee Feed Co.凯迪饲料公司
27. McDermott Will & Emery LLP 元达律师事务所
28. McDonald's 麦当劳
29. McLarty Associates 麦克拉提咨询事务所
30. Monsanto 孟山都公司
31. MTC Logistics MTC 物流公司
32. Nebraska Department of Agriculture 内布拉斯加农业部
33. Nebraska Department of Economic Development 内布拉斯加经济发展部
34. North American Meat Institute (NAMI)北美肉类协会
35. Northwest Horticultural Council 美国西北园艺理事会
36. OSI Foods 福喜集团
37. Phibro Animal Health 美国辉宝动物保健品有限公司
38. Sealed Air 希悦尔（中国）有限公司
39. Smithfield Foods 美国史密斯菲尔德食品公司
40. Swire Pacific Cold Storage Limited 太古冷藏仓库有限公司
41. Syngenta (China) Investment Co., Ltd. 先正达（中国）投资有限公司
42. Tyson Food 美国泰森食品有限公司
43. U.S. Dairy Export Council (USDEC)美国乳品出口委员会
44. U.S. Grains Council (USGC)美国谷物协会
45. U.S. Livestock Genetics Export (USLGE) 美国国家畜遗传出口公司
46. U.S. Meat Export Federation (USMEF)美国肉类出口协会
47. U.S. Soybean Export Council (USSEC)美国大豆出口协会
48. U.S. Wheat Associates 美国小麦协会
49. USA Poultry and Egg Export Council (USAPEEC)美国家禽蛋品出口协会
50. Walmart 沃尔玛集团

U.S. Trade Development Agency (USTDA)



The U.S. Trade and Development Agency helps companies create U.S. jobs through the export of U.S. goods and services for priority development projects in emerging economies. USTDA links U.S. businesses to export opportunities by funding project preparation and partnership building activities that develop sustainable infrastructure and foster economic growth in partner countries.

USTDA in China

USTDA's program in China focuses on trade capacity building initiatives, technical assistance, and pilot projects in the transportation, energy, agriculture, and healthcare sectors. These efforts help create market access for U.S. companies looking to work in China.

The Agency's success in China is due in part to the public-private cooperation programs that USTDA supports in country. These programs provide a forum for government agencies and private companies from both countries to share technical, policy, and commercial knowledge to advance shared goals. USTDA has successfully established programs based on this model in the aviation, standards and conformity assessment, energy, agriculture and healthcare sectors.

By adapting to the evolving needs of China's market and closely coordinating with decision-makers, these public-private partnerships have achieved long-term success, providing continued trade opportunities.

By adapting to the evolving needs of China's market and closely coordinating with Chinese decision makers, these public-private partnerships have enjoyed long-term success, providing continued trade opportunities and enhancing the development of China's key industries.

美国贸易发展署(USTDA)

美国贸易和发展署帮助企业通过向新兴经济体重点发展项目出口美国产品和服务，创造在美国的就业机会。通过资助项目的准备、伙伴关系的建立等活动，贸发署在美国企业与出口机会之间建立连接，同时在伙伴国家发展可持续基础设施、促进经济发展。

贸发署在中国

贸发署在中国的业务，重点关注在交通运输、能源和医疗行业的贸易能力建设计划、技术帮助、以及试点项目。这些业务帮助那些希望在中国开展业务的美国公司创造进入市场的机会

贸发署在中国的成功，一部分是因为其支持的各种公私合作计划。这些计划为美中两国的政府机构和私有公司提供了一个论坛，使它们能够分享具体领域的相关技术、政策和商业知识。基于此模式，贸发署成功地在航空、水质量、标准遵守和评估、能源、以及医疗产业创设了各种项目。

通过适应中国市场不断变化的需求，密切与中国决策者协调，这些公私合作关系长期以来一直很成功，向中国重点产业提供了持续的贸易机会并增强了其发展。

IV. Speaker Biographies

IV. 演讲人介绍

Shuilong LI

Vice President, International Meat Secretariat (IMS)
President, China Meat Association (CMA)



Shuilong LI, Professorate Senior Engineer, was born in Fujian Province in 1955 and graduated from Shanghai Aquatic Products University. He further studied on meat processing technology in Germany in 1986. He once worked as the Deputy General Manager of China Hua Fu Trade & Development Group Corporation, currently the Vice President of International Meat Secretariat (IMS) and the Executive President of China Meat Association. He is dedicated to the meat industrial technology and management of enterprise and making outstanding contribution to the innovation of meat foodstuff enterprises. He was awarded the certificate of Project Technology Special Contribution by the State Council on 6 April 1999 and enjoyed the Special Government Allowance.

李水龙

中国肉类协会会长
世界肉类组织副主席

1955 年出生于福建，毕业于上海水产大学。1986 年留学德国，进修肉类加工技术，教授级高级工程师，原中国华孚贸易发展集团副总经理。现担任中国肉类协会执行会长、世界肉类组织副主席。长期从事肉类食品工业技术和企业管理工作，在肉类食品企业改革方面有突出的贡献。1999 年 4 月 6 日被国务院授予享受政府特殊津贴的专家称号。

Wei CHEN

Executive Vice President and Secretary General
China Meat Association

1993 Graduated from Tianjin University of Commerce majored in Food Engineering

2000 Graduated from City University of Macau majored in MBA

1993-2002 Worked for China National Foodstuffs Group Corp. (CNFG)

2002-present Has been working for China Meat Association (CMA)



陈伟

中国肉类协会常务副会长兼秘书长

1993 年 毕业于天津商学院 食品工程专业

2000 年 毕业于澳门国际公开大学 工商管理硕士

1993—2002 年 就职于中国食品集团公司

2002 年至今 就职于中国肉类协会

Jennifer W. Lee

Executive Director, US-China Agriculture and Food Partnership (AFP)

Jennifer has over a decade of experience working in Greater China. Through senior positions at the U.S. Department of Energy in Washington DC and Beijing at the U.S. Department of Commerce, Commercial Service across China, she has garnered broad experience in government affairs, trade policy, communications, CSR, and creating Public-Private Partnerships across many industry sectors. In over 7 years working in diplomatic capacities, Jennifer had key roles in 16+ senior level bilateral meetings including Strategic & Economic Dialogue (S&ED) and Joint Commission on Commerce and Trade (JCCT) negotiations.



While Senior Policy Advisor for the U.S. Department of Energy (DOE), Jennifer served as the chief China representative for the Office of Policy and International and advisor to the Assistant Secretary overseeing U.S.-China policy and cooperation in Clean Energy. She was the Chief architect overhauling U.S.-China Energy Policy Dialogue, creating a framework aligning government-to-government policy negotiations with private/3rd sector technical, and commercial cooperation with China. In this capacity, Jennifer served as key negotiator and liaison with multiple Chinese ministries, across U.S. Government agencies, DOE Technical offices, private industry (including Energy Cooperation Program), and Lab/University stakeholders in establishing sector roadmaps. Jennifer was also primary China lead in coordinating between three consortia of U.S. and Chinese companies in the execution of the landmark \$150m Clean Energy Research Center (CERC) launched by Presidents Obama and Hu.

Prior to DOE, Jennifer worked in various capacities in trade policy, trade advocacy/promotion, and marketing-communications for the U.S. Department of Commerce, Commercial Service across the U.S. Embassy and Consulates in China for six years.

李佩仪

中美农业与食品合作项目（AFP）的秘书长

李佩仪女士在大中华区拥有十年以上的丰富工作经验。她曾担任美国能源部在华盛顿总部和北京，以及美国驻华使领馆商务处等在内的多个资深职位。李佩仪女士在政府事务，贸易政策，新闻公关，企业社会责任，跨行建立政府与行业之间的合作关系方面具有广泛的经验。在为外交事业服务的过去七年中，李佩仪女士曾十六次在中美战略与经贸对话（Strategic & Economic Dialogue (S&ED)）和中美经济与贸易联席委员会（Joint Commission on Commerce and Trade (JCCT)）等在内中美双边谈判中，担任重要工作。

在担任美国能源部（DOE）的资深政策顾问期间，李佩仪女士作为该部门政策与国际事务司的驻华代表，为中美两国在清洁能源领域的政策合作向助理部长提供协助。她曾是中美能源政策对话建立过程中的首席策划者，为建立两国政府间的谈判框架，和在中国的行业与技术交流过程中做出了很大的贡献。在此期间，李佩仪女士作为联络中方多个部委，以及包括美国能源部技术司在内的多个政府

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部门之间，和行业（能源合作项目），研究机构，等不同利益相关方之间对话的关键谈判专家。李女士还是美方三个行业联盟和中方公司在执行清洁能源合作中心（CERC）的首席代表。该中心是中美能源合作领域的标志性项目，总投资金额超过一亿五千万美元，并由奥巴马总统和时任中国国家主席胡锦涛宣布成立。

就职美国能源部之前，李佩仪女士曾在美国商务部，为贸易政策，贸易宣传，和市场宣传等方面与美国驻华使馆和多个领馆内服务六年时间。

Guillaume ROUÉ

President

INAPORC – the French Interprofessional Pork Council

President of IMS

President of INAPORC

Vice-president of National Pork Federation

President of Evel'up cooperative

Guillaume Roué plays an important role both in France and international pork industry. He is the president of IMS and has been the president of INAPORC – the French Interprofessional Pork Council – since 2002 and Vice-president of the National Pork Federation. Mr ROUE is also a farmer, his pig farm is located in Brittany in the west of France. He also serves as the president of the second largest pig cooperative Evel'up.



胡儒

法国猪业联盟主席

世界肉类组织主席

法国猪业联盟主席

法国养猪联合会副会长

法国 Evel'up 合作社社长

无论在法国还是国际猪业组织，胡儒先生均扮演着重要角色。胡儒先生是世界肉类组织主席，他从 2002 年开始一直担任法国猪业联盟会长，另为法国养猪联合会副会长。他也是一名养殖户，他的农场坐落在法国西部布列塔尼地区，也担任了自己养殖场所属的法国第二大养猪合作社 Evel'up 社长一职。

Steven Winkates

Director of Program Management, East Asia Region
U.S. Trade and Development Agency (USTDA)



Steven Winkates is the Director of Program Management for the East Asia Region at USTDA, based at the U.S. Embassy in Beijing, China. He is responsible for managing USTDA’s activities in China and Mongolia, directing business development efforts, coordinating with relevant stakeholders in both the region and the United States, and marketing USTDA services to potential partners in both countries.

Prior to this position, Mr. Winkates worked in Beijing for a consulting firm which specializes in developing transportation infrastructure projects. He also previously served as a Country Manager at USTDA, covering China and Southeast Asia during his tenure, and as a Policy Analyst at the U.S. Department of Commerce. Mr. Winkates holds a Master of Public Policy from Georgetown University and a Bachelor of Arts from Rhodes College.

温凯时

美国贸易发展署东亚区项目主任

温凯时的职务是美国贸易发展署东亚区项目主任，就任于美国驻华使馆。他负责美国贸易发展署在中国和蒙古的项目，指导业务拓展，协调项目所在国相关方与美方的关系，并推动美国贸易发展署与两国潜在合作伙伴的合作。在就任之前，温凯时在北京一家从事交通基础设施项目的美国咨询公司工作。在此之前，他担任过美国贸易发展署负责中国，东南亚项目的项目经理。还有过在美国商务部从事政策分析的经历。

温凯时拥有罗德大学文学学士和乔治城大学公共政策硕士学位。

David E. Williams

Vice President
Informa Economics IEG

David Williams is a vice president of Informa Economics IEG. He is director of the Agribusiness Intelligence Protein Group as well as a member of the IEG Client, Advisory and Development group. In this capacity, Mr. Williams directs the global activities of the protein channel and coordinates insight and intelligence with respect to the global analytic protein groups within the Agribusiness Intelligence



vertical. Based out of Austin, Texas, his primary responsibilities include working with IEG customers on

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understanding the global meat supply, meat-based project consulting as well as client services. He also works with customers on livestock hedging and trading models. Mr. Williams came to IEG from Cargill, where he worked in many different roles over 16 years, including leader of export sales for meat business unit, leader of futures trading for the meat business unit, and general manager of the Cargill grain export business in Texas and Oklahoma. He received his bachelor's degree in animal science from Texas Tech University and his master's degree in business administration from Friends University.

David E. Williams

Informa Economics IEG 副总裁

David Williams 是 Informa Economics IEG 的副总裁,同时也是农业商务智能蛋白质小组主管级 IEG 客户、咨询和发展小组的成员。在他的职务范围内, Williams 先生主管与农业商务智能垂直部门的全球蛋白质分析小组相关的蛋白质链和内部协调及智能的全球活动。在德克萨斯州奥斯汀,他主要负责 IEG 客户对全球肉类供应的理解、肉类相关项目咨询及客户服务。他还为牲畜对冲贸易模型相关的客户服务。Williams 先生在 IEG 工作之前曾在嘉吉公司工作超过 16 年,包括领导肉类商务单元的出口销售、期货交易及嘉吉在德克萨斯和奥拉克河马的谷物出口的主管。他取得德克萨斯州科技大学的动物科学的学士学位及富兰兹大学商务管理的硕士学位。

Joel Haggard

Senior Vice President of U.S. Meat Export Federation Asia Pacific Region



Mr. Haggard joined USMEF in 1988 as a regional marketing consultant and later became director of the USMEF-Hong Kong office when that office opened in 1989. Joel Haggard returned to the Asia-Pacific to serve as vice president-Asia Pacific for the U.S. Meat Export Federation in March 1994, after several years in the USMEF-Denver office. Stationed in the USMEF-Hong Kong office, Mr. Haggard oversees USMEF market development strategies and programs for U.S. red meat products in the region. Before joining USMEF, Mr. Haggard worked for the USDA Foreign Agricultural Service for five years. During that time, he served as the agricultural trade officer for the U.S. Embassy in Beijing, China, where he supervised all marketing activities involving U.S. agricultural trade with the People's Republic of China. Prior to that, Mr. Haggard worked as grain analyst for USDA's Foreign Agriculture Service in Washington, D.C., analyzing and forecasting international trade patterns. Mr. Haggard has a Bachelor of Science Degree in Political Economy of Natural Resources from the University of California, Berkeley, and a Master of Science Degree in Agricultural Economics from the University of Wisconsin. He speaks both Mandarin and Cantonese.

何嘉德

美国肉类出口协会亚太地区高级副主席

Haggard 先生于 1988 年加入美国肉类出口协会(USMEF)并担任区域市场顾问, 随后在 1989 年 USMEF 在香港成立办公室后成为了其主管。在 USMEF 美国丹佛办公室任职数年之后, 1994 年 3 月, Joel Haggard 回到亚太地区作为美国肉类协会亚太地区的副主席。在驻 USMEF 香港办公室期间, Haggard 先生负责监管 USMEF 市场发展战略和美国红肉产品的区域性项目。在任职 USMEF 之前, Haggard 先生在美国农业部对外农业服务局工作了 5 年。在那期间, 他曾在位于北京的美国驻华大使馆担任农业贸易的政府官员, 并负责监管涉及中美农业贸易的市场活动。在这之前, Haggard 先生在美国农业部华盛顿办公室的对外农业服务局担任粮食分析员, 分析并预测国际贸易板块。Haggard 先生取得了加州大学伯克利分校自然资源政策经济学的学士学位及威斯康辛大学农业经济学的硕士学位。他会说普通话和粤语。

Jos Goebbels

Jos Goebbels graduated as veterinarian at the University of Utrecht and is an honored specialist in Veterinary Public health. He worked many years in the Ministry of Health of The Netherlands and Director of the Dutch Inspection services (NVWA) of the Ministry of Agriculture and Managing Director of the MAF Verification Agency in New Zealand.



He started his job as President of the Dutch Meat Association (COV) and the Dutch Meat manufacturing Association (VNV) in 2009. He is Vice president of the UECBV (The European Livestock and Meat Trade Union) and president of the Meat Industry of UECBV. He is Vice President of CLITRAVI (Association for the meat processing industry in Europe) and president of supply chain of CLITRAVI.

Jie MA

Deputy General Manager, Wuxi Tian Peng Group Co., Ltd,
President, Wuxi Tian Peng Vegetable Basket Project Co., Ltd

Mr. Ma Jie, Deputy General Manager of Wuxi Tian Peng Group Co., Ltd, President of Wuxi Tian Peng Vegetable Basket Project Co., Ltd. Senior Economist, member of the organizing committee of Asia-Pacific region of World Union Wholesale Markets.



Mr. Ma Jie, as the corporate leader in three decades, persists in learning, enhance management ability. He united the leader team, with his pioneering spirit, characters of innovation, integrity, self-discipline and devotions; he is not only made a positive contribution to the enterprise reform and development but also made an important leading role in the food industry and market development of Jiangsu province.

马杰

无锡天鹏集团有限公司常务副总经理
无锡天鹏菜篮子工程有限公司董事长

马杰，现任无锡天鹏集团有限公司常务副总经理、无锡天鹏菜篮子工程有限公司董事长、总经理、高级经济师，世界批发市场联合会亚太地区工作组委员会委员。马杰同志在担任企业领导的三十多年中，始终坚持学习，不断提升经营管理能力，团结班子一班人，开拓进取，勇于创新，廉洁自律，乐于奉献，不仅在企业改革和发展进程中做出了积极的贡献，还在推动江苏食品行业和市场发展中做出了重要的引导作用。

GüntherThofehn

Government Affairs, Brazilian Beef Exporters Association (ABIEC)

Graduated in Veterinary Studies at Lutheran University of Brazil - ULBRA Masters in Agribusiness at University of Sao Paulo – ESALQ/USP. Completed a two years internship at the Agriculture Defense Division at the Brazilian Ministry of Agriculture, Livestock and Food Supply – MAPA.Has been working for three years at the Brazilian Beef Exporters Association – ABIEC.Currently working in Brasilia D.F. as ABIEC’s Government and Corporate Affairs representative.



Patrick Hutchinson

Chief Executive Officer (CEO), Australia Meat Industry Council (AMIC)

Patrick Hutchinson was promoted to the CEO position of AMIC in mid-2017, following a period as the AMIC General Manager of the processor group. Previous to AMIC, Patrick has over 20 years’ experience in the meat

industry. His career highlights included terms as general manager of Livestock Exchange and ITS Global North America; and manager of product integrity and assurance at Meat and Livestock Australia.

Patrick has a proven track record in leading the growth of meat industry businesses and organizations, including agricultural consultancy firms. Further, Patrick has experience as a livestock producer, growing beef cattle on the lush pastures of his family farm in the beautiful Southern Highlands in NSW. Patrick is married with 3 sons.



马相杰

河南双汇投资发展股份有限公司总裁

双汇集团

马相杰先生，河南叶县人，1972年出生，中共党员，本科学历，硕士学位。1996年从河南农业大学毕业后到双汇工作，先后任研发员、香辅料分厂厂长、海樱公司总经理、天瑞生化公司总经理、鲜冻品事业部生产副总经理、综合事业部总经理、生鲜品事业部总经理、双汇发展副总裁等职务，现任双汇发展总裁，是河南省人大代表。



Ruibo YU

President, Delisi Group Co., Ltd.

President, Shandong Delis Food Co., Ltd.

Yu Ruibo, born on 9thFeb. 1975, with university degree, a senior economist and a member of the Communist Party of China. Since 1995, he has served for below positions: Chief Secretary, Operation Manager and Secretary of Board for Delis Group

General Manager of Shandong Delis Biotech. Company President of Delis Group Co., Ltd., President of Shandong Delis Food Co., Ltd. He is also a member of the 12th and 13th CPPCC in Weifang, and Vice President of Meat Association in Shandong Province. In 2012, he was awarded the title of Science and Technology Innovation Person by China Meat Association, and the Leading Person of Shandong Meat Association. In 2013, he was awarded Top Ten Pioneers of the 8th National Rural Youth Prosperity Program by the Central Committee of the League and the Ministry of Agriculture. He is also awarded the below titles: Outstanding entrepreneurs in Shandong food industry; Outstanding private entrepreneurs of Weifang; Top Ten Outstanding Youth Entrepreneurs of Weifang; Outstanding Individuals in National Food Safety Management.



于瑞波

得利斯集团有限公司总裁

山东得利斯食品股份有限公司总裁

于瑞波，1975年2月9日出生，大学本科学历，高级经济师，中共党员。1995年起，历任得利斯集团公司秘书科科长、运营部经理、董事会秘书，山东得利斯生物科技有限公司总经理，得利斯集团有限公司总裁、山东得利斯食品股份有限公司总裁。是潍坊市第十二、十三届政协委员、山东省肉类协会副会长。2012年被中国肉类协会授予“中国肉类产业科技创新人物”、被山东省肉类协会评为“山东肉类食品行业20年领军人物”。2013年被团中央和国家农业部授予第八届“全国农村青年致富带头人十大标兵”。为“山东省食品工业优秀企业家”、“潍坊市优秀民营企业家”、“潍坊市十大杰出青年企业家”、“全国食品安全管理先进个人”。

XibinCHEN

President, China Meat Association Beef & Lamb Branch
Chairman, Grand Farm Group

Xibin CHEN, The Chairman of Grand Farm Group, the standing committee member of Heilongjiang Provincial People's Congress, vice president of Federation of Industry and Commerce of Heilongjiang province, the president of CMA Beef & Lamb Branch; In 36 years, dedicated to create premium ecological "beef and lamb".



陈希滨

中国肉类协会牛羊业分会会长、大庄园集团董事长

大庄园集团董事长陈希滨，现任黑龙江省人大常委、黑龙江省工商联副主席、中国肉类协会牛羊业分会会长；36年专注打造“牛羊”生态好肉。

Jieming CHU

President, China Meat Association Meat Snacks Branch
Chairman and General Manager, Jiangsu Shuangyu Food Co.,Ltd.

Jieming Chu, male, the member of the Chinese Communist Party. He is also the Chairman and General Manager of Jiangsu Shuangyu Food Co.,Ltd .He was selected as the National People's Congress of Taizhou and a member of the Technical Committee of Science and Technology Standardization of China Meat Association expert. He is an expert of China Meat and Poultry Aquatic Products Expert Committee and the member of the Standards Committee. He is a member of Jiangsu Food Science and Technology expert pool and the president of Meat Snacks Branch of the Chinese Meat Association now.



褚洁明

中国肉类协会休闲肉制品分会会长、江苏双鱼食品有限公司董事长

江苏双鱼食品有限公司是专业生产肉制品的企业，生产以“双鱼”牌猪肉脯为代表的熏烧烤肉制品、干肉制品、灌肠肉制品、西式火腿制品、腌腊制品、酱卤制品等6大系列50余种产品。公司始终坚持“百年品牌”的经营理念，以高品位的产品质量赢得了社会认可和消费者信赖。“双鱼”牌猪肉脯两次荣获国家质量金奖，自1993年至今连续被评为江苏名牌产品，并于2012年荣获中国驰名商标称号；“双鱼”牌猪肉灌肠一直出口香港市场。公司牢记肩负的社会责任，积极从事慈善事业，树立了良好的社会形象。公司于2011年搬迁至靖江经济开发区，目前致力于从工艺技术创新着手，努力实现自动化、智能化，把传统手工式生产企业打造成为一个自动化、智能化的高科技型工厂。

Onat Bayraktar

Vice President, Food Care Asia, Sealed Air



Onat Bayraktar is the Vice President for the Food Care division of Sealed Air Corporation in Asia, managing the business operations alongside giving the strategic direction to the business in the region. Sealed Air's Food Care Division provides packaging solutions that increase operational efficiency, extend shelf life and reduce resource use and waste throughout the global food and beverage supply chain.

Onat is a committed individual for sustainability and food safety. He works thoroughly to support Food & Beverage industry in efforts to reduce food waste and its negative impacts to climate change. He believes food packaging industry has a major role in delivering safe food to humanity.

Prior to his current role, Onat was the F&B Business Unit Director for the Greater Asia Pacific region for the Diversey corporation. In his years with Diversey, Onat has served in other management positions including Managing Director of Turkey & Middle East, Regional F&B Director for Central Eastern Europe, Turkey, Africa and Middle East, Regional Processed Food Sector Leader, and F&B Director for Turkey.

Prior to joining Diversey in 1997, Onat has held various management positions in Unilever in Finance and IT from September 1991.

Onat has an Electronics Engineering degree from Istanbul Technical University and an MBA from Istanbul University.

Onat Bayraktar

希悦尔公司亚洲区食品保护部门副总裁

Onat Bayraktar 先生目前担任希悦尔公司亚洲区食品保护部门副总裁，负责管理业务运营，同时为该地区的业务制定战略方向。希悦尔食品保护部门提供包装解决方案，帮助全球食品和饮料供应链提高运营效率、延长食品货架期并减少资源消耗与浪费。

Onat 关注可持续发展和食品安全。他致力于支持食品与饮料行业减少食物浪费，并减少由此为气候变化带来的负面影响。他认为食品包装行业在向人们提供安全的食品方面发挥着重要作用。

在担任现任职务之前，Onat 曾担任泰华施公司大亚太地区的食品与饮料业务总监。在泰华施工作期间，Onat 还担任过一些其他的管理职位，包括土耳其和中东地区董事总经理，中东欧、土耳其、非洲和中东地区食品与饮料业务总监，区域加工食品行业市场负责人以及土耳其食品与饮料业务总监。

在 1997 年加入 Diversey 之前，Onat 于 1991 年 9 月至 1997 年间曾在联合利华的财务和 IT 部门担任不同的管理职位。

Onat 拥有伊斯坦布尔技术大学的电子工程学位和伊斯坦布尔大学的 MBA 学位。

Charles Ling

Managing Director-Export Sales, Greater China, Tyson International

Charles joined Tyson Foods since 2008 and responsible for US Tyson products exporting to Greater China region covering China, Hong Kong, Taiwan and Southeast Asia. Prior to joining Tyson, Charles has worked in leading foods importer and distributors in Mainland China and HK for over 20 years.

Charles is now managing three main offices located in Shanghai, Hong Kong and Taipei. Products coming from Tyson US to China now are beef and pork which are available in key importers in China and also key sales channels.

Charles is also playing a key coordination role with the Tyson China poultry team. Tyson is having three poultry facilities in China including two fully integrated poultry complex and one prepared foods plant.



凌隆重

泰森大中华区董事总经理-出口业务

凌先生于 2008 年加入泰森食品，并负责美国泰森产品在大中华区的出口，区域包括中国、香港、台湾及东南亚。在加入泰森之前，凌先生在中国大陆和香港的领先食品进口商和经销商工作了 20 多年。凌先生目前管理上海、香港和台北三个主要办公室。目前由美国泰森出口至中国的产品主要有牛肉和猪肉，这在中国主要的进口商和销售渠道都有供应。

凌先生在泰森中国家禽团队也起到重要的协调作用。泰森在中国有三个家禽基地，包括两个完全整合的家禽厂和一个预加工食品厂。

William W. Westman

Senior Vice President of International Affairs North American Meat Institute

For the past 8 years, William has served as the Vice President and Senior Vice President of International Affairs for the largest meat packers association in the U.S. William travels to China several times each year to advance the interests of AFP. He served as the USDA Minister Counselor for Agriculture in Beijing for 2 ½ years prior to joining the Meat Institute. William has served on the AFP Board of Directors since AFP began and has Co-Chaired the Animal and Animal Products Working Group. As Co-Chair of the AFP Animal and Animal Products Working Group, William has been working to integrate our broad membership into the “Farm to Chopsticks” concept to more closely coordinate and leverage the many activities and programs we have underway. Through this type of cooperation and mutual assistance, we not only assist in enhancing the effectiveness of our programs but become more closely aligned with China’s agricultural and food production goals and objectives.



魏人威

北美肉类协会（NAMI）副总裁兼国际事务的高级副总裁

在过去 8 年，魏人威先生任职于北美肉类协会（NAMI）副总裁兼国际事务的高级副总裁。每年几次访问中国，推进中美农业与食品的融合与交流。在加入北美肉类协会之前，他曾担任北京的美国农业部农业参赞。同时，魏人威先生目前亦是中美农业与食品合作项目（AFP）董事会成员，且担任畜牧业及动物产品工作组（Animal and Animal Products Working Group）联合主席。作为工作组联合主席，魏人威先生一直致力于为广大的会员融入“从农场到筷子”的食品安全生产理念，以更密切地协调和指导正在进行中的中美双边合作项目。通过合作和互助，不仅有助于提高合作项目的有效性，并与中国的农业和粮食生产的目的是目标更加一致。

Cheng DENG

President, China Meat Association Poultry & Eggs Branch

President, New Hope Liuhe Co., Ltd.



邓成

中国肉类协会禽（蛋）业分会会长

新希望六和股份有限公司总裁

邓成，现任新希望六和股份有限公司总裁，西南财经大学研究生。曾历任新希望六和人力资源总经理、山东经营特区总裁、新希望六和股份有限公司副总裁等职，在战略创新、精益管理、组织变革、企业文化、阿米巴经营等方面创新成就卓著。

Jianhua CHEN

Director & Vice President, Fujian Sunner Group Shareholding Co., Ltd.



陈剑华

福建圣农集团控股有限公司董事副总裁

陈剑华，男，1973 年出生，中国国籍，硕士研究生学历。陈剑华先生曾就职于福建华兴证券公司、福建省资信评估公司、华泰证券有限责任公司等多家金融企业单位，负责多家上市公司的股份制改制、股票发行上市和企业收购兼并工作；2002 年进入公司工作。现任公司董事兼副总裁，兼任福建海圣饲料有限公司董事、嘉合基金管理有限公司董事、上海银龙食品有限公司董事！

Dr. Kenneth E. Petersen



2018 Global Meat Industry Executive Roundtable – M50

2018 全球肉类产业高层圆桌论坛-M50

Senior Vice President, Quality and Regulatory Affairs OSI Group, LLC

Dr. Kenneth Petersen is the Senior Vice President, Quality Assurance and Regulatory Affairs for OSI Group, LLC. He leads OSI's global food safety and quality initiatives, and chairs OSI's Global Quality Council. With over 65 plants in 17 countries, OSI Group is a global leader in producing value-added protein and other food products for leading brands. From 2005 to 2012, Dr. Petersen was Assistant Administrator of the Office of Field Operations, Food Safety and Inspection Service, USDA, Washington, DC. He led the strategic, technical, and managerial direction for an 8,000 person public health oriented workforce conducting inspection, HACCP verification, recalls, and enforcement at 6,200 meat, poultry, and processed egg product businesses throughout the United States. Dr. Petersen began his career with FSIS in 1989 as a field veterinarian.

Education:

Master of Public Health, Uniformed Services University of the Health Sciences. Bethesda, MD. 1996.

Doctor of Veterinary Medicine, University of Illinois. 1982

Bachelor of Science, Physiology, University of Illinois. 1978

肯尼斯·彼得森博士

OSI集团质量保证和法规事务高级副总裁

肯尼斯·彼得森博士是 OSI 集团质量保证和法规事务高级副总裁。他领导 OSI 全球食品安全和质量工作，并且担任 OSI 全球食品质量与安全体系委员会主席。OSI 集团作为全球生产增值肉制品和其他食品全球的领导者，在 17 个国家运营了超过 65 个工厂，为领导品牌供应食品产品。从 2005 年到 2012 年，彼得森博士担任位于华盛顿的美国农业部食品安全检验局现场作业办公室的助理署长。他为领导 8,000 人的专业公共卫生工作队伍提供战略、技术和管理的方向，并对全美 6,200 家肉类、家禽和加工蛋制品公司进行检验，HACCP 验证，召回，和监管执法。彼得森博士于 1989 年在食品安全检验局从作为一个现场兽医开始了他的职业生涯。

教育背景:

公共健康硕士，健康科学统一服务大学，贝塞斯达，马里兰州，1996 年

兽医学博士，伊利诺伊大学，1982 年

理学学士，生理学，伊利诺伊大学，1978 年

Philippe Duriez

CEO, AOSTE

CEO, International Export, Campofrio

A Board member of French Industry meat association: INAPORC AND FICT

As a board member of INAPORC & FICT, CEO of AOSTE group and CEO of International Export of CAMPOFRIO group, Philippe DURIEZ has been engaged in meat sector as one of pioneer in early of 1999 from Smithfield group, then followed by other meat companies such as Aubret as well as Pere Oliver. In 2014, Philippe joined CAMPOFRIO group by taking care of global sourcing as well as plants' operations where he developed with the team several innovational programs in optimizing the whole integrate food chain.

In the coming presentation, Philippe would share the scripted success AOSTE group in meat snacks area by looking into the regulatory side development in France as well as the technological development story of meat snacks.

As one of the leading group in France & an important business unit of CAMPOFRIO group; AOSTE group's 40-year bulletproof development is calculated by 4 premium and refined brands as well as 6 plants specializing in dry ham, dry sausage and sliced products respectively. AOSTE is the Leader in dry meat category in France and favored by French people, simultaneously demonstrated its strong presence in other European countries such as Germany, Belgium, UK, Spain.



菲利普·杜瑞兹

Philippe DURIEZ 先生现任法国 AOSTE 集团首席执行官以及 CAMPOFRIO 集团全球出口总裁(法国 AOSTE 集团隶属于西班牙 CAMPOFRIO 集团旗下)。同时，他也是法国白猪协会和法国肉类协会的董事会成员之一，积极推动法国肉类行业的发展。Philippe DURIEZ 先生从 1999 年开始在史密斯菲尔德集团工作，然后曾在 Aubret 以及 Pere Oliver 肉类公司就职：从事出口、工厂运营等多项工作。2014 年开始 Philippe 加入 CAMPOFRIO 集团负责集团全球采购以及所有工厂优化运营管理。

Philippe DURIEZ 先生在他的演讲中要与大家分享法国休闲肉制品行业的发展以及相关技术标准。法国 AOSTE 集团是西班牙 CAMPOFRIO 集团的重要业务单位之一：是法国肉类行业的先驱之一，在法国拥有 40 多年的历史，旗下拥有 6 个肉类加工厂专业从事火腿、干制香肠及各类分割业务。在法国，AOSTE 集团更拥有人们热爱并熟知的 4 个肉类品牌，同时集团业务也遍及其它欧洲国家如德国、比利时、英国、西班牙等。

Henny Swinkels

Director Corporate Affairs, VanDrie Group

Mr. Swinkels is working in the veal industry for more than 25 years. At first at the Cooperative feed factory Sloten BV, then as General Director KalverslachterijAalten (KSA – Veal Slaughterhouse Aalten) and currently as Director Corporate Affairs of the VanDrie Group.

Mr. Swinkels is active in the meat and veal industry and currently holds several positions like:

- * Vice President of the Dutch Central Organisation for the Meat Sector (COV);
- * Member of the Veal Committee at the European Livestock And Meat Trading Union (UECBV);
- * Member of the Executive Council of the International Meat Secretariat (IMS);
- * Chair of the Veal Committee at International Meat Secretariat (IMS);
- * Board member of Nevedi (Dutch Feed Industry);
- * Vice-president of the Milk Replacers Committee at the European Feed Manufacturers' Federation (FEFAC);
- * Board member of the Dutch Foundation for Quality Guarantee of the Veal Sector (SKV);
- * Vice President of the Dutch Branche Organisation of the Veal Sector (SBK);
- * Member of the Advisory Board for the Dutch Society for Protection of Animals;
- * Board member of the China Chamber at Netherlands Council for Trade Promotion (NCH);



Dr. Juhui HUANG

Vice President of Corporate Affairs, BRF Greater China

Dr. Juhui Huang is Vice President of Corporate Affairs, Greater China for BRF since Jan 2017. In this role, he serves as BRF's principal liaison with the Chinese government, industry associations and state-owned companies. He is based in Beijing.

Dr. Huang began his career in China's Ministry of Agriculture in 1994 before accepting senior government affairs and business development positions in the private sector.

Prior to joining BRF, he served as senior director and chief representative of ADM

Beijing Representative Office. He also served as vice president of government affairs for the Pharmaceutical Industry Association Committee, and director of government affairs and business development for Cargill.

Dr. Huang is a business leader and government relations veteran with over 20 years' experience in agriculture, food and life science industries. He is a frequent speaker in high profile conferences including the JCCT US-China Agriculture and Food Conference, the China Food Security & Safety Strategy Summit, and the Government Relations Summit of Conference Board.

He is a co-chair of the Agricultural Forum of AmCham China and a founder of US-China Agriculture and Food Partnership (AFP). He serves as a non-executive director of the board of COFCO Meat Holding Limited (HK.01610) since Dec 2017. He holds a doctorate in agronomy from China Agricultural University.



黄菊辉博士

巴西食品公司大中华区公共事务副总裁

黄菊辉博士自2017年1月起担任巴西食品公司大中华区公共事务副总裁。代表巴西食品公司，负责加强与中国政府、行业协会和国有企业的沟通和联系，促进巴西食品公司在华业务发展。他常驻北京。

黄菊辉博士于1994年供职中国农业部，随后在大型国际农业和食品企业担任政府事务和业务发展高级职务。加入巴西食品公司之前，他出任ADM公司政府关系高级总监兼北京代表处首席代表。并曾担任药品研制和开发行业委员会政府事务副总裁，以及嘉吉公司政府事务和业务发展总监。

黄菊辉博士在大型跨国农业、食品和生命科学企业和行业协会有超过20年的管理经验和政府事务从业资历。他还经常受邀出席高层论坛，包括主持中美经贸联委会中美农业与食品研讨会，担任中国粮食安全与食品安全战略峰会和其他政府关系高峰会的演讲人。

他是中国美国商会农业论坛的联席主席，也是中美农业与食品合作项目的创始人之一。自2017年12月开始，他还担任中粮肉食控股有限公司（HK.01610）的非执行董事。他毕业于中国农业大学，获农学博士学位。

WuqunHOU

President, China Meat Association Fermented Ham Branch

Vice President, Chuying Agro-Pastoral Group Co., Ltd.

Mr. HouWuqun, Vice Chairman of Chuying Agriculture and Animal Husbandry, used his professional quality and good business ability to lead the company to create brilliant results. He is also the honorary vice president of the National Association for Poverty Alleviation and Development, a member of the 13th Committee of the CPPCC Zhengzhou City, and the director of the Zhengzhou Chief Quality Officer Club.



侯五群

中国肉类协会发酵火腿分会会长

雏鹰农牧集团股份有限公司副董事长

侯五群先生，雏鹰农牧副董事长，任职期间用自身专业素质和良好的商业能力，带领公司创造辉煌业绩。同时兼任国家扶贫开发协会荣誉副会长，政协郑州市第十三届委员会委员，郑州市首席质量官俱乐部主任。

LonghuZHU

Vice General Manager COFCO Meat & General Manager of Fresh Products, COFCO Meat Investment Co., Ltd.

Longhu ZHU, currently Deputy General Manager of COFCO Meat Investment Co., Ltd, General Manager of Dept. of Fresh Pork & Processed Meat. He worked in Shuanghui Company for 20 years, working as Deputy General Manager of Shuanghui Processed Meat Business Unit (in charge of production operation), Deputy General Manager of Shuanghui Development Co., Ltd., and General Manager of Fresh Meat Business Unit. He has rich experience in fresh and processed meat industry, with deeper understanding of the industry's current development and future trends.

朱龙虎

中粮肉食副总经理兼生鲜制品部总经理

现任中粮肉食投资有限公司副总经理兼生鲜制品部总经理，曾在双汇工作 20 年，历任双汇肉制品事业部副总经理（主管生产运营）、双汇发展股份有限公司副总经理兼生鲜事业部总经理等职务，具有丰富的生鲜制品管理经验，对生鲜制品行业现状及未来发展有更深层的理解和认知

Michael R. Mullen

Assistant Vice President Corporate Accounts, Food & Beverage Global Solutions

Mr. Mullen joined Ecolab in 1996. He has been exclusively focused on the protein market for the past 17-years. His experience includes various levels of account management, business segment leadership and global responsibility for the some of the world's largest protein companies. He has been directly involved in the development and/or deployment of Ecolab's antimicrobial technologies. Mr. Mullen has become a trusted advisor to his customers based on a keen understanding of processing aids and has been specifically recognized for innovations in water recycling. Mike's focus is to assist his global customers in attaining their food safety and business objectives sustainably, while leveraging Ecolab resources and technologies to improve the efficiency of their operations.

Mr. Mullen has a Bachelor of Arts degree in Marketing from the University of St. Thomas, Saint Paul, MN, USA

Michael R. Mullen

Mullen先生于1996年加入艺康。他专注于肉制品市场17年。他的经验包括各种集团客户的管理，业务领域的领导和一些世界级肉制品公司的全球管理。他也曾经参与许多艺康抗微生物技术项目的发展和部署。Mullen先生基于对抗菌药物的敏锐了解，成为客户值得信赖的顾问，同时他也专注于水循环利用方面的创新。Mike的工作重点是协助全球客户可持续地实现其食品安全和业务目标，同时利用艺康的资源和技术提高运营效率Mullen 先生拥有美国明尼苏达州圣保罗圣托马斯大学营销学学士学位。



Zhinong YAN

Executive Director, Walmart Food Safety Collaboration Center

Dr. Zhinong Yan is the Executive Director of the Walmart Food Safety Collaboration Center (WFSCC). He has nearly 30 years of academic and industry experience in microbiology and food safety. Before joining the WFSCC, he was the Asia-Pacific Food Safety Director for Ecolab; he also worked at a food processing equipment firm and a food safety consultancy. He has provided food safety services for over 150 food processing plants in more than 20 countries in North America, South America, Europe and Asia. He has designed and conducted over 200 training sessions on enterprise food hygiene and safety. Dr. Yan is currently Member of the Global Food Safety Initiative's (GFSI) China Steering Committee and Expert Advisor of Food Safety Committee of the China Chain-Store & Franchise Association (CCFA). Dr. Yan received his BSc. and MSc. in plant pathology from China Agricultural University in 1988 and 1994 respectively, and his PhD from Auburn University in 2000. He completed his postdoctoral research at the University of Georgia, and Michigan State University where he also served as an assistant professor in the Department of Food Science and Human Nutrition.



严志农博士

沃尔玛食品安全协作中心执行主任

严志农博士现任沃尔玛食品安全协作中心执行主任。严博士拥有近 30 年广泛的微生物学和食品安全方面的研究和丰富的工业界的实践经验。在加入沃尔玛食品安全协作中心之前，严博士曾担任艺康集团亚太区食品安全总监，之前还曾在食品加工设备和食品安全咨询公司工作。他曾为北美、南美、欧洲和亚洲的 20 多个国家超过 150 个不同类型的食品工厂提供食品安全服务，制定和开展企业食品卫生和安全培训逾 200 次。严博士现任全球食品安全倡议（GFSI）中国区指导委员会委员，中国连锁经营协会（CCFA）食品安全委员会专家顾问等社会职务。严博士于 1988 年和 1994 年在中国农业大学获得植物病理学学士和硕士学位，2000 年在美国奥本大学获得植物病理学博士学位，之后曾在佐治亚大学和密执根州立大学从事博士后研究。严博士曾是密执根州立大学食品及营养系研究助理教授。



Peg Soderberg

CEO, Moving Floor AB – Sweden

Peg Soderberg grew up on a pig farm on Gotland in Sweden. After studying economics at Lund university she continued on to work in several countries in the world – France, Italy, Canada and Norway. She returned to Gotland and the family company to start commercialize the concept of automatic cleaning, developed by her parents. She is now share holder of Moving Floor AB and runs it together with her sister Katja Lindvall.



索得博格

首席执行官

佩格索德博格成长于瑞典哥特兰的一个养猪场。在隆德大学学习经济学之后，她陆续在世界上的几个国家工作—法国，意大利，加拿大和挪威。她回归到哥特兰岛和家族企业开始将她父母研发的自动清洁构想商业化。她现在是活动地板 AB 公司的股东并与她的妹妹卡迪亚：林德沃一起经营此公司。

Marc FEUNTEUN

Export Director, SVA JEAN ROZE – France

35 years Meat Export Manager. Team building, discovering new markets, insuring best practices, optimizing sales have always been a strong incentive throughout my career.



My experience, from Farming in Scotland, selling beef in Germany to building Export departments in 3 of the main French meat packers, has allowed me to meet dedicated, passionate professionals. Farmers, proud of their historical yet modern know how, Butchers in their meat packing plants or shops, inventive yet rigorous on hygiene, animal welfare and safety, Salesmen in supermarkets and outlets attentive to client demands, Cooks, artists bringing out the best in our meat. Working with all these great people has been paramount in overcoming the crises our profession has known and the ones to come.

In the last ten years, with the help of such people, I have opened up new markets (Algeria, Tunisia, Egypt, UAE, Singapore, Phillipine, Vietnam, South Africa...) And now CHINA? HND Edinburgh School of Agriculture, Scotland. MBA, ESC Rennes, France

V.Company Information

V.公司信息

Informa Economics IEG



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As part of Informa's Agribusiness intelligence division, IEG connects you directly to data, insight and outlook platforms that reach every relevant global sector. With IEG at the forefront, Informa Agribusiness intelligence helps the world's largest and most influential agribusiness organizations gain advantage by delivering actionable intelligence across the food and commodities value chain. We cover the entire value chain, helping you stay close to the market so you can anticipate changes. We'll work with you to develop the ideal strategies and solutions for your business, using our data, fundamental analysis and forecasts.

We offer supply and demand forecasts, price forecasts, expert analysis and guidance on Crops; Livestock & Dairy; Policy; Transportation, Infrastructure & Logistics; Sugar & Cocoa; and Energy.

With offices in Europe, APAC, South America and North America, and through affiliate relationships with consultancies in Russia, China, Australia, Turkey, Argentina, India, and Southeast Asia, IEG's reach is truly global. In whatever region of the world you do business, IEG is there for you.

Informa Economics IEG

Informa Economics IEG 是 Informa Agribusiness Intelligence 的一部分。

作为 Informa Agribusiness Intelligence 的分支，IEG 直接为您提供一个分享数据、洞察力和前景的平台，涉及每一个相关的全球部门。凭借 IEG 的领先地位，Informa Agribusiness Intelligence 帮助世界上最大和最具影响力的农业企业组织通过在食品和商品价值链中提供可行的方案，从而获得优势。我们覆盖了整个价值链，帮助您掌握市场动态，以便您预测市场的变化。我们将与您合作，在使用我们的数据、基础分析和预测的基础上为您制定理想的策略和解决方案。

我们提供工序预测。价格预测、农作物专业分析指导；畜牧业&乳业；政策；运输、基础设施物流；糖&可可；及能源。

我们在欧洲、亚太地区、南美洲和北美洲设有办事处，通过与俄罗斯、中国、澳大利亚、土耳其、阿根廷、印度及东南亚等地的咨询机构的关联，IEG 拥有全球性的业务范围。

无论您在何处，IEG 都在您身边为您提供服务。

U.S. Meat Export Federation



The mission of USMEF is "to increase the value and profitability of the U.S. beef, pork, and lamb industries by enhancing demand for their products in export markets through a dynamic partnership of all stakeholders." Simply put, USMEF is "Putting U.S. Meat on the World's Table."



Funded by the Beef Checkoff.



The U.S. Meat Export Federation (USMEF) was established in 1976 as a nonprofit trade association working to create new export opportunities for U.S. beef, pork, lamb and veal. USMEF receives funding from the U.S. Department of Agriculture (USDA), the beef, pork, lamb, corn and soybean checkoff programs, as well as its members representing nine industry sectors: beef/veal producing & feeding, pork producing & feeding, lamb producing & feeding, packing & processing, purveying & trading, oilseeds producing, feedgrains producing, farm organizations and supply & service organizations. Headquartered in Denver, USMEF has offices in Beijing, Brussels, Hong Kong, Mexico City, Monterrey, Moscow, Seoul, Shanghai, Singapore, St. Petersburg, Taipei and Tokyo. USMEF also has special market representatives operating in China, the Middle East, Central & South America and the Caribbean.

USMEF carries out market development activities in more than 80 countries. These activities fall into several primary areas:

USMEF carries out market development activities in more than 80 countries. These activities fall into several primary areas:

- Marketing - Creating demand in international markets for U.S. meat through promotions, trade seminars, consumer education, advertising and public relations.
- Trade Servicing - Working to bring buyer and seller together and by conducting both market and product research.
- Market Access - Providing the U.S. government and industry with the market intelligence necessary to secure, maintain and develop fair and reasonable access to international markets.

美国肉类出口协会

美国肉类出口协会的宗旨是通过与业务关连者建立积极的伙伴合作关系，扩大出口市场外需，从而达到为美国牛肉、猪肉和羊肉产业增值和提升回报的目标。简而言之，我们的使命就是“令美国红肉风行全世界”。

美国肉类出口协会成立于1976年，是一个非营利的畜肉推广组织。协会成立的宗旨是为美国牛肉、猪肉、羊肉和犊牛肉开拓出口商机。我们的主要营运资金途径，源于美国农业部，美国牛肉、猪肉、羊肉和大豆基金会的拨款计划及代表九大产业的会员捐款。九大产业指牛肉和犊牛肉的畜牧及生产单位、猪的畜牧及生产单位、羊的畜牧及生产单位、屠宰加工厂、贸易加工厂、油籽生产、饲料生产、农场及相关行业服务的公司。我们的总部设于丹佛，并在北京、上海、香港、台北、首尔、东京、新加坡、莫斯科、圣彼得斯堡、墨西哥城、蒙特雷以及布鲁塞尔设有办公室。此外，我们在中国、中东、中南美洲和加勒比海等地皆有特驻推广专员。我们在全球八十多个国家进行市场拓展活动，涉猎范围主要分为：

2018 Global Meat Industry Executive Roundtable – M50

2018 全球肉类产业高层圆桌论坛-M50

- 市场推广：利用推广营销活动、商务研讨会、教育性计划、广告及公共关系以扩展海外市场对美国肉品的需求。
- 贸易服务：通过在世界各地所建立的良好贸易网络，将各地市场合适的买家及卖家紧密联系起来；协会亦会进行市场和产品调查，收集市场资讯。
- 市场准入：为美国政府和肉类出口商提供出口相关贸易问题的顾问意见和市场讯息，目标是构建更公平和更少贸易壁垒的国际营商环境。

Dutch Mat Association (COV)



The COV promotes the interests of the Dutch meat industry, both at national and international level. COV's members represent an annual

turnover of € 10 billion and are actively involved in exports and imports of meat on a global level.

COV and its members are committed to produce meat in a sustainable way. All Dutch meat is controlled by integrated quality schemes covering extra requirements concerning food safety and animal welfare in line with the high requirements of the Dutch society and consumers worldwide.

The Dutch Meat industry is exporting to more than 100 countries and providing more than 100 million consumers with meat. We are one of the leading global exporters of pork and the world number one exporter of veal. China is the most important export market for pork for the Dutch meat industry, with an export volume in 2017 of 200.000 ton.

The COV and its members are committed to produce safe and sustainable meat and fulfill consumers requirement worldwide.

Wuxi Tian Peng Group Co., Ltd



Wuxi Tianpeng Vegetable Basket Project Co.,Ltd. is a domestic famous modernize food processing and producing circulation large-scale enterprise specializing in pig slaughtering, meat-product processing, storage and wholesale dealing of refrigerated animal product and exclusive agency and distribution of free-pollutant animal product.

As one of the municipal key units of Vegetable Basket Program, Wuxi Tianpeng Vegetable Basket Program Limited Corporation has built a Wuxi Tianpeng Food town which covers the floor area of 233,333 square meters and the construction area of 300,000 square meters, a national 4-star workshop with a capacity of one million pigs for slaughtering, processing and distributing, a 60,000 tons of full-temperature-layer intelligent refrigerating chamber, as well as other facilities as nearly 1,500 shops, supporting service buildings and parking lots. The annual supply of 120 million pigs to Wuxi local pork market from our corporation occupies 50%-60% of the total. Also in the proportion of supplies of kinds of fresh refrigerated animal products, dry condiment, fast food and seafood, we achieve 60%-70% of total

market share. Since the average total turnover of Tianpeng Food Town is over 12 billion RMB, it offers a strong assurance and demonstration to the local construction of animal product safety program and the market of commercial circulation.

无锡天鹏菜篮子工程有限公司

无锡天鹏菜篮子工程有限公司是一家以生猪屠宰、肉制品加工、生鲜冷冻荤食品储存、批发交易和放心荤食品配送专卖为主的国内著名大型现代化食品生产加工、流通型企业。

无锡天鹏菜篮子工程有限公司是无锡市政府菜篮子工程重点实施单位之一，现有占地面积约350亩，总建筑面积约30万平方米的“无锡天鹏食品城”，建有符合国家四星级标准的100万头生猪屠宰加工配送车间、6万吨全温层智能化冷藏库和近1500间商铺及市场配套服务楼、停车场等设施。公司平均每年向无锡市场供应生鲜猪肉120多万头，占无锡市场猪肉供应量的50—60%；供应各类鲜冻荤食品、干货调味品、方便食品、海鲜水产品等约50万吨，占无锡市场供应量的60—70%。天鹏食品城年平均成交总额120多亿元，为无锡肉类荤食品安全工程建设和商业流通领域市场保供提供了强有力的保障和示范推动作用。

Brazilian Beef Exporters Association (ABIEC)

Created in 1979, the Brazilian Beef Exporters Association (ABIEC) brings together 33 companies of the sector in Brazil, responsible for 92% of the meat traded for international markets. Its creation was a response to the need for a more active role in the beef export segment in Brazil, by defending the interests of the sector, increasing efforts to reduce trade barriers and promote domestic products. Currently, Brazil produces 10 million tons of beef, 20.8% are traded to dozens of countries around the world, following the most stringent quality standards. In the last decade, the country registered growth of 135% in the value of its exports.

Australia Meat Industry Council (AMIC)



The Australian Meat Industry Council is the sole peak industry council that represents post-farm-gate Australian meat industry, including processors (abattoirs), cold stores, independent boning rooms, independent retailers, small goods manufacturers, and exporters.

澳大利亚肉类行业理事会

澳大利亚肉类行业理事会是唯一一个代表澳大利亚肉类行业的最高行业理事会，包括加工厂（屠宰场）、冷库、独立分割厂、独立零售商、小商品制造商及出口商。

Shuanghui Group



Headquartered in Luohe City, Henan Province, Shuanghui is China's largest meat processing base, key national enterprises of agricultural industrialization. Shuanghui builds more than 30 modern meat processing base and supporting industries in 18 provinces and cities across China mainland, forms a complete industrial chain including breeding, feeding, slaughtering, meat processing, new material packaging and cold-chain logistics. The annual production and marketing of meat products reaches more than 300 million tons, with nearly one million sales terminals to make sure Shuanghui products can be delivered and arrived on the same day throughout China, except Xinjiang and Tibet. With brand value of 49.7 billion yuan, Shuanghui ranked first in the Chinese meat industry for over 20 years.

Headquartered in Hong Kong, WH-Group, Shuanghui's Shareholder (formerly Shuanghui International), is the world's largest pork food business ranked as No. 495 of the World's top 500 companies published by Fortune in 2016. It has brands Shuanghui in China and Smithfield in U.S. together with many other products and brands favored by the market. Shuanghui brand fresh meat and king of the kings sausage are well-known in China, and Smithfield brand is renowned in European and American markets. Its international business covers more than 20 countries around the world. WH-Group is ranked first in the world in three areas including meat processing, fresh meat marketing and pig breeding, and is considered as the world's largest, most widely arranged and the most competitive pork enterprises with the most complete industry chain.

WH-Group has two listed companies. They are "Shuanghui Development" (000895) listed on Shenzhen Stock Exchange and "WH-Group" (00288) listed on Hong Kong Stock Exchange. Shuanghui development ranked the 24th in Forbes 2014 as top 100 of the world's most innovative enterprises while listed the first in Mainland China. WH-Group's stock has been included into the UK FTSE index and Hang Seng integrated large-cap index of Hong Kong. In 2016, WH-Group entered into the World's top 500 companies published by Fortune.

Chairman Wan Long of Shuanghui Group has more than 40 years of meat industry management experience. Under his leadership, two listed companies are built up, one is on list of Fortune 500 companies and the other is a visionary, experienced, highly dedicated, highly focused management team. Mr. Wan Long is awarded Special Hero of Luohe City, Ten Meritorious Entrepreneurs of Chinese Meat Industry, U.S.-China Economic and Trade Development Leader, global God of Cooking selected by Time magazine of the United States.

After the internationalization, the great Shuanghui will continuously adhere to the concept of reform and innovation, adhere to the globalization of development strategies to accelerate global expansion and resource integration, make good use of global resources and markets, persist to maintain and consolidate its leading position in the country and in the world. Under the guidance of structure adjustment, network

development, transformation promotion, scale enlargement, Shuanghui will further improve the product, expand brand influence, enhance the competitiveness of enterprises, continue to provide healthy, safe, rest assured, fashionable products for the vast number of its consumers, to create lasting value to its shareholders and the society.

双汇集团

双汇是中国最大的肉类加工基地，农业产业化国家重点龙头企业，总部在河南省漯河市。双汇在全国 18 个省（市）建有 30 多个现代化的肉类加工基地和配套产业，形成了养殖、饲料、屠宰、肉制品加工、新材料包装、冷链物流、连锁商业等完善的产业链，年产销肉类产品 300 多万吨，拥有近百万个销售终端，全国除新疆、西藏外，双汇的产品都可以做到朝发夕至。双汇品牌价值 497 亿元，连续 20 多年居中国肉类行业第一位。

双汇控股母公司—万洲国际（原双汇国际），是全球最大的猪肉食品企业，在 2016《财富》世界 500 强排序中列 495 位，总部在香港。万洲国际业务辐射全球 20 多个国家，拥有中国“双汇”、美国“史密斯菲尔德”等众多备受市场青睐的产品和品牌，双汇牌冷鲜肉、双汇王中王在中国家喻户晓，史密斯菲尔德品牌享誉欧美市场。万洲国际在肉制品、生鲜品和生猪养殖三大领域均排名全球第一，是全球规模最大、布局最广、产业链最完善、最具竞争力的猪肉企业。

万洲国际拥有 2 个上市公司，“双汇发展”（000895）深圳上市，“万洲国际”（00288）香港上市。“双汇发展”在福布斯“2014 全球最具创新力企业 100 强”位列第 24 位，中国大陆第 1 位。“万洲国际”股票被列入英国富时指数、香港恒生综合大型股指数。2016 年万洲国际进入世界 500 强。

双汇集团董事长万隆先生，拥有 40 多年的肉类行业管理经验。在他的带领下，培育了两个上市公司、一个世界 500 强企业 and 一支远见卓识、经验丰富、高度敬业、高度专注的管理团队。万隆先生被授予“漯河市特等功臣”、“中国肉类行业十大功勋企业家”、“美中经贸发展领军人物”、美国《时代》周刊全球“食神”。国际化后的大双汇，将继续坚持改革创新理念，坚持全球化发展战略，加快全球扩张和资源整合，用好全球资源和市场，继续保持和巩固在全国、全球的领先地位，在“调结构扩网络促转型上规模”的方针指引下，进一步做好产品，做大品牌，做强企业，持续提供健康、安全、放心、时尚的产品，为广大消费者、股东和社会创造永续价值。

Delisi Group Co., Ltd.



Delisi Group Limited was established in November 1, 1986, Delisi Group is a representative enterprise of Shandong Province high-class safety food demonstration zone and the first batch of state leading enterprises of agricultural industrialization.

Over the past 30 years, the company has been focusing on the whole pig industry chain and meat processing, pursuing the corporate purpose of "strengthening the health of Chinese people and improving the of the

nation", devoting itself to the historical mission of "improving the nutrition of food for people, climbing the peak of meat science", and developing from an unknown village-run enterprise into a large food processing group with one listed company and 62 subsidiaries has built four major production bases, 10 marketing centers, more than 200 sales offices and more than 20,000 terminal outlets, with more than 6,500 employees and a total assets of 6.8 billion yuan.

Since the beginning, the company has focused on the research and development of leading technology in the industry and innovation, actively explore new ideas for business development, strive to forge ahead and bravely strive for the first, through continuous efforts, "Delisi" has become the first China Well-known trademark in Weifang City, under the "cold meat" and "low-temperature cooked meat products" were double-rated as China's famous brand products. Shandong Delisi Food Co., Ltd. has become the first listed company in the meat industry in Shandong Province. It has won the "Shandong Provincial Governor Quality Award" and "Jilin Provincial Governor Quality Award" and has made remarkable achievements.

得利斯集团有限公司

得利斯集团得利斯集团有限公司创立于 1986 年 11 月 1 日，扎根于舜帝故里、因龙而兴的历史文化名城——山东诸城，是山东省高端安全食品示范区代表企业，首批农业产业化国家重点龙头企业。

30 年来，公司以生猪全产业链及肉类食品加工为主营业务，奉行“增强国人体魄，提高民族素质”的企业宗旨，致力于“改善大众饮食营养，攀登肉食科学高峰”的历史使命，从一个名不见经传的村办企业发展成为拥有 1 家上市公司、62 家子公司的大型企业集团，在全国建成四大生产基地、10 个营销中心、200 多个办事处、覆盖全国 20000 多家终端网点，拥有员工 6500 多人，总资产达 68 亿元。公司自创立以来，专注于行业领先技术的研发和创新，积极探索经营发展新思路，拼搏进取、奋勇争先，通过不断努力，“得利斯”成为潍坊市第一个中国驰名商标，旗下的“冷却肉”和“低温肉制品”被双双评为中国名牌产品，旗下山东得利斯食品股份有限公司成为山东省肉类行业第一家上市公司，先后荣获“山东省省长质量奖”和“吉林省省长质量奖”并取得了举世瞩目的成就。

Grand Farm Group



Founded in 1982, Grand Farm Industrial Group is a large private enterprise group operating business in import and export trade, modern ecological agriculture, ecological animal husbandry, food processing and husbandry tourism, and it is also a president unit of China Beef and Sheep Association, with the annual output value of nearly RMB 4.9 billion yuan.

With natural base for cattle and sheep ranches and meat sources, Grand Farm has established one million acres of grassland as well as ranch for raising 100,000 cattle and sheep in high-quality pastoral areas in Heilongjiang and Inner Mongolia. With successive investment of 3.9 billion in China, two production and

processing parks, 18 logistics distribution centers and nationwide sales network have been established.

Grand Farm has become one of leading suppliers of meat food products in Asia.

大庄园集团

大庄园集团始建于 1982 年，是一家集进出口贸易、现代生态农业、生态牧业、食品加工、农牧业旅游等于一体的大型民营企业集团，是中国牛羊肉协会会长单位，年产值近 49 亿元。

大庄园拥有天然的牛羊牧场和肉源基地，在黑龙江和内蒙古优质牧区已自建百万亩草场和十万头牛羊牧场，引进万头和牛及安格斯牛；先后投资 39 个亿建设 2 个生产加工园区，配备 18 个物流分装配送中心，销售网络覆盖全国，已跃居亚洲领先肉食品供应商行列；是世界最大羊肉出口企业新西兰阿兰茨集团的中国总代理，连续 18 年进口量全国第一，同时还是世界最大牛肉生产企业 JBS 在世界范围内的重要合作伙伴。

Jiangsu Shuangyu Food Co., Ltd. – China



Jiangsu Shuangyu Food Co., Ltd. is specialized in the production of meat products manufacturers, production of " Shuangyu " brand dried pork slices as the representative of the smoked and grilled meat products、dried meat products、 enema meat products、 western ham products、cured meat products、sauce products and other 6 series more than 50 kinds of products.The company always adhere to the "hundred years Brand" business philosophy, by the high grade product quality to win the social recognition and trust of consumers."ShuangYu" brand dried pork slices two won the national quality award,and since 1993 has been awarded as Jiangsu famous brand,"ShuangYu" trademark won the Chinese well-known trademark title in 2012; "ShuangYu"brand pork sausage exported to HONGKONG aii the time.The company keep in mind the social responsibility,actively engaged in charity, and establish a good social image.The company moved to Jingjiang Economic Development Zone in 2011,at present, it is committed to start from technological innovation, to realize automation and intelligence, and to build traditional manual production enterprises into an automatic and intelligent high-tech factory.

江苏双鱼食品有限公司

江苏双鱼食品有限公司是专业生产肉制品的企业，生产以“双鱼”牌猪肉脯为代表的熏烧烤肉制品、干肉制品、灌肠肉制品、西式火腿制品、腌腊制品、酱卤制品等6大系列50余种产品。公司始终坚持“百年品牌”的经营理念，以高品位的产品质量赢得了社会认可和消费者信赖。“双鱼”牌猪肉脯两次荣获国家质量金奖，自1993年至今连续被评为江苏名牌产品，并于2012年荣获中国驰名商标称号；“双鱼”牌猪肉灌肠一直出口香港市场。公司牢记肩负的社会责任，积极从事慈善事业，树立了良好的社会形象。公司于2011年搬迁至靖江经济开发区，目前致力于从工艺技术创新着手，努力实现自动化、智能化，把传统手工式生产企业打造成为一个自动化、智能化的高科技型工厂。

Sealed Air



Sealed Air Corporation is a knowledge-based company focused on packaging solutions that help our customers achieve their sustainability goals in the face of today's biggest social and environmental challenges. Our portfolio of widely recognized brands, including Cryovac® brand food packaging solutions and Bubble Wrap® brand cushioning, enable a safer and less wasteful food supply chain and protect valuable goods shipped around the world. Sealed Air generated \$4.5 billion in sales in 2017 and has approximately 15,000 employees who serve customers in 122 countries. To learn more, visit www.sealedair.com.

希悦尔公司

希悦尔公司是一家知识型企业，致力于通过包装解决方案帮助客户应对当今社会和环境的巨大挑战，实现可持续发展目标。希悦尔拥有Cryovac®快尔卫®食品包装解决方案和Bubble Wrap®气泡薄膜材料等享誉全球的品牌，帮助创造更安全的食品供应链、减少食物浪费，保护运往世界各地的物品完好无损。2017年，希悦尔创造了45亿美元的销售额，拥有大约15,000名员工，为遍布122个国家的客户进行服务。如需了解更多内容，请访问www.sealedair.com。

Tyson Foods



Founded in 1935, Tyson Foods, Inc. is one of the world's largest food companies with leading brands such as Tyson®, Jimmy Dean®, Hillshire Farm®, Sara Lee®, Ball Park®, Wright®, Aidells® and State Fair®. We are a recognized market leader in chicken, beef and pork as well as prepared foods, including bacon, breakfast sausage, turkey, lunchmeat, hot dogs, pizza crusts and toppings, tortillas and desserts.

Our operations are conducted in four reportable segments: Chicken, Beef, Pork and Prepared Foods. Some of the key factors influencing our business are customer demand for our products; the ability to maintain and grow relationships with customers and introduce new and innovative products to the marketplace; accessibility of international markets; market prices for our products; the cost and availability of live cattle and hogs, raw materials, grain and feed ingredients; and operating efficiencies of our facilities. We operate a fully vertically integrated chicken production process. Our integrated operations consist of breeding stock, contract growers, feed production, processing, further-processing, marketing and transportation of chicken and related allied products, including animal and pet food ingredients. Through our wholly owned subsidiary, Cobb-Vantress, Inc. (Cobb), we are one of the leading poultry breeding stock suppliers in the world. Investing in breeding stock research and development allows us to breed into our flocks the characteristics found to be most desirable.

We also process live fed cattle and hogs and fabricate dressed beef and pork carcasses into primal and sub-primal meat cuts, case ready beef and pork and fully cooked meats. In addition, we derive value from allied products such as hides and variety meats sold to further processors and others. We produce a wide range of fresh, value-added, frozen and refrigerated food products. Our products are marketed and sold primarily by our sales staff to grocery retailers, grocery wholesalers, meat distributors, warehouse club stores, military commissaries, industrial food processing companies, chain restaurants or their distributors, live markets, international export companies and domestic distributors who serve restaurants, foodservice operations such as plant and school cafeterias, convenience stores, hospitals and other vendors. Additionally, sales to the military and a portion of sales to international markets are made through independent brokers and trading companies.

泰森食品

泰森食品公司成立于 1935 年，是世界上最大的食品公司之一，旗下品牌有 Tyson®，JimmyDean®，HillshireFarm®，SaraLee®，BallPark®，Wright®，Aidells®和 StateFair®。我们在鸡肉、牛肉、猪肉及预加工食品食品包括培根、早餐肠、火鸡、午餐肉、热狗、比萨、玉米饼和甜品这一领域是市场公认的领导者。

我们的业务分成四块：鸡肉、牛肉、猪肉和预加工食品。我们业务的至关因素有：消费者对我们产品的需求；与客户保持并发展关系、并向市场推广新的和创新的产品；进入国际市场；我们产品的市场价格；活猪活牛、原料、谷物和饲料的成本和可用性以及设备的运作效率。

我们的鸡肉生产是一个完全垂直整合的体系。我们的生产包括育种、合同养殖、饲料生产加工、深度加工、鸡肉及相关产品（动物和宠物饲料）的市场推广和运输。通过我们的知名子公司 Cobb-Vabtrex（Cobb），我们成为了世界领先的家禽饲养供应商之一。投资育种研发让我们有着优质的鸡种。

我们还加工活牛活猪，生产出牛肉猪肉并进行原始和次级肉类切割，最终制成熟食。此外，我们从相关产品获得更多价值，如出售皮制品和内脏制品用于深入加工。

我们生产各种新鲜的、有附加值的、冷冻和冷藏食品。我们的客户主要由我们的销售人员向零售商、批发商、肉类分销商、仓库商店、军事商店、工业食品加工企业、连锁餐厅或他们的分销商、牲畜市场、国际出口公司和国际分销商，他们为餐馆、餐饮服务机构（如工厂和学校食堂、便利店、医院及其他供应商）。此外，通往军用及部分国际市场的销售则经由一些独立的经纪人和贸易公司。

North American Meat Institute (NAMI)



NAMI is a national trade association that represents companies that process 95 percent of red meat and 70 percent of turkey products in the US and their suppliers throughout America.

Headquartered in metropolitan Washington, DC, NAMI keeps its fingers on the pulse of legislation, regulation and media activity that impacts the meat and poultry industry and provides rapid updates and analyses to its members to help them stay informed. In addition, NAMI conducts scientific research through its Foundation designed to help meat and poultry companies improve their plants and their products. The Institute's many meetings and educational seminars also provide excellent networking and information-sharing opportunities for members of the industry.

North American Meat Institute (NAMI) is working cooperatively with the China Meat Association to foster and promote business-to-business connections to enhance adoption of advanced meat processing technologies and improve the meat and poultry distribution network in China.

北美肉类协会

北美肉类协会是代表在美洲的肉类生产，以及肉类供应商的行业协会，其会员单位生产在美国95%的红肉制品和70%禽肉类制品。

总部位于华盛顿特区的北美肉类协会，旨在为会员单位提供肉类和禽类相关的及时的法律法规和媒体宣传，以及其他肉类生产的行业市场信息和分析，帮助其成员单位紧随行业的发展。同时，北美肉类协会亦进行旨在帮助肉类和禽肉生产企业提高生产工业和产品质量的科学研究。协会每年都定期举行学术座谈和信息共享，为行业内会员提供相互交流和经验分享的平台。

北美肉类协会（North America Meat Institute）与中国肉类协会共同培养和促进企业间关系，提高先进肉类加工技术的应用以及改善肉类与家禽在中国的分销网络。

New Hope Group



New Hope Group was founded in 1982 by Mr. Yonghao LIU, a renowned Chinese private entrepreneur. It is a pioneering private company which has progressed and grown along with China's reform and opening-up. Over the past three decades, New Hope Group has remained among the Top 500 Chinese enterprises for the past 14 consecutive years. It has created tremendous social and commercial value.

New Hope Group now has more than 600 subsidiaries in 30 countries, nearly 70,000 employees and annual revenues of nearly 100 billion Yuan. Leveraging its resources and expertise, New Hope Group has constantly branched out into new industries and sectors, from feed production to agriculture technology, food processing, channel construction, facility building and financial service, as well as focused on investing and operating emerging innovative companies that have growth potentials.

New Hope Group now holds a total of RMB 110 billion in assets and is highly praised for its robust financial structure. As a participant in multiple financial markets such as banking, security, Internet finance and fund, New Hope is given an AAA credit rating by China Chengxin International Credit Rating Co. Ltd. (CCXI).

New Hope Group entered the global landscape in 1997 and set up its first overseas factory in Vietnam in 1999. The Group now has more than 40 factories in operation or under investment in nearly 20 countries across the globe. It continues to innovate and strengthen investments in Australia, Europe and North America. During its quest for global expansion in the past decade, New Hope Group has established sustainable partnerships with renowned international companies and institutions such as Mitsui & Co, Cargill and IFC. It sought win-win cooperation with an open mind and tried to integrate international quality resources through value-based alliance.

After 33 years, New Hope Group maintains its strong growth focus and momentum. Guided by the Belt and Road Initiative and the Internet+ concept, the Group sees exciting new developments in Youthization, Globalization, Internalization, Industrial and Financial Integration.

新希望集团

新希望集团有限公司始创于 1982 年，由著名民营企业家刘永好先生发起创立，是伴随中国改革开放进步和成长的民企先锋。在 30 余年的发展中，新希望集团连续 14 年位列中国企业 500 强前茅，创造了巨大的社会价值与商业价值。

新希望集团在全球 30 多个国家和地区拥有分子公司超过 600 家，员工近 7 万人，年销售收入近 1000 亿元人民币。在发展中，新希望集团基于自身资源和优势，不断开拓新的产业领域，从饲料生产，跨入农业科技、食品加工、渠道终端、设施建设、金融服务等多个领域。目前，新希望集团已逐步成为以现代农业与食品产业为主导，并持续关注、投资、运营具有创新能力和成长性的新兴行业的综合性企业集团。

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目前，集团资产规模达 1,000 余亿元，并且保持着稳健的财务结构。集团旗下拥有银行、证券、互联网金融和基金等多种金融业态布局。作为多个资金市场的参与者，集团主体信用等级由中诚信国际信用评级有限公司（“中诚信”）评定为 AAA 信用等级。

新希望集团早在 1997 年便开始海外业务探索，并于 1999 年在越南建成第一家海外工厂。目前，集团在海外近 20 个国家和地区投产、建设、筹建、投资的工厂达 40 余家。新希望集团不断创新海外发展方式，在澳洲、欧洲和北美洲等地区持续加大投资力度。在十余年国际化发展的探索道路中，新希望集团以开放共赢的心态与包括日本三井物产(Mitsui& Co)、美国嘉吉公司(Cargill)、世界银行国际金融公司(IFC)等在内的国际知名企业和机构建立了持续稳固的合作关系，通过构建价值联盟实现了全球优质资源的整合。

历经 30 余年的发展，新希望在今天依旧保持强劲的发展势头，在国家“一带一路”战略以及“互联网+”新思维的引导下，集团将年轻化、国际化、互联网化和产业金融一体化作为新时期发展的引擎。

OSI Group



OSI Group, as a global food processor, has more than 65 facilities in 17 countries around the world. OSI was established in 1909 and its headquarters are located near Chicago, Illinois, in the United States of America.

OSI produces raw, partially-cooked, and fully-cooked chicken, beef, and pork products, as well as a variety of other non-meat products including pizza, baked goods, and produce. The company sells products in over 40 countries.

Customers of OSI include world leading quick service restaurants and other away-from-home food providers, branded food marketers, and food retailers.

OSI's core operating philosophy centers on partnering with well-known food companies offering its manufacturing expertise and global infrastructure to develop and produce a range of products and services while eliminating or minimizing commodity exposure to OSI and its customer partners.

欧喜集团

作为世界级的食品加工商，欧喜集团在全球的 16 个国家建有逾 60 家工厂，拥有近 20,000 名员工。集团成立于 1909 年，总部位于美国伊利诺伊州，临近芝加哥。

欧喜集团向超过 40 个国家和地区销售全生，半熟，全熟的鸡肉，牛肉，和猪肉制品，及各种非肉类产品包括披萨，烘焙食品，鸡蛋和蔬菜农产品。

欧喜集团的客户包括全球快餐和外卖连锁供应商，品牌食品营销商，及食品零售商。

欧喜集团的核心运营理念为和知名食品公司合作，提供专业的食品制造经验和全球性的基础设施，在开发和生产系列优质产品并提供服务的同时，规避大宗商品价格波动风险或将风险减到最小。

AOSTE Group, Campofrio Food Group



Campofrio Group belongs to part of global leading Sigma food group. As the one of the leader of European leading processed meat, The group represents the specialist of European heritage by providing dried ham, dried sausages, fresh meat, cooked ham, hot dogs, cold cuts as well as ready meals and snacks.

The headquarter of the group is located in Madrid of Spain, where the company has 9 plants manufacturing plant including one fresh meat plant. Other 18 plants are located in France, Italy, Belgium, Portugal and Romania respectively. Every day the group is serving for 250 million consumers by its over 500,000 points of sales around the world.

凯博菲丽食品集团

Campofrio (凯博菲丽)集团隶属于全球领先的 Sigma 食品集团, 是欧洲领先的肉制品专家. 秉承欧洲传统食品理念, 集团业务涉及腌制火腿, 腌制香肠, 鲜肉业务, 熟制火腿, 热狗香肠, 即食产品以及休闲肉制品.

集团总部位于西班牙马德里. 在西班牙集团有 9 个工厂, 包括一个鲜肉业务工厂. 其余 18 个肉类加工厂分别位于法国, 意大利, 比利时, 葡萄牙和罗马尼亚.

每一天, 集团通过 500 万个销售点为 2.5 亿的消费者提供着各类不同的美味产品.

Vandrie Group



The Dutch family business the VanDrie Group is the global market leader in veal, calf leather and calf milk powder. With more than 25 companies and an annual turnover of approximately € 1, 97 billion, the VanDrie Group is the largest private agribusiness group in the Netherlands. It exports its high-quality products to more than 60 countries around the world.

Veal is easily digestible and highly nutritious. The Dutch controlled quality veal of the VanDrie Group meets all the requirements to address food needs worldwide. As the global demand for meat protein rises, new and innovative ways to produce the necessary quantities are required and the VanDrie Group can meet these requirements. The VanDrie Group is an integrated producer that manages the entire production

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chain, including calf husbandry, raw dairy products processing, calf feed, calf slaughterhouses, calf skins, marketing and promotion.

Throughout the production chain, food safety, animal welfare and environmental management are assured by Safety Guard, the VanDrie Group's unique full-service quality system. Safety Guard is based on ISO 22000 and incorporates IFS and BRC. The key feature of Safety Guard is its traceability system. Each individual animal has an earmark - its ID code - which remains associated with the animal and the meat throughout the chain. Even when a cut of meat is reduced further at the deboning plant, it continues to be associated with its ID code and can thus be traced back to the individual animal it came from.

All veal products of the group are delivered according to client specifications, including the shape, weight and colour of the meat. Any desired cut can be produced.

The VanDrie Group's methods are based on innovation, know-how and craftsmanship. At the VanDrie Group, respect for people, animals and quality has been second nature for generations.

BRF



BRF is a global meat producer headquartered in Sao Paulo, and is publically listed in both Sao Paulo and New York stock market. BRF is the largest poultry producer in the world, accounts for 14% of global poultry supply. It is also one of the top five swine breeding companies in the world. BRF owns 54 slaughtering and processing plants in South America, Europe, Mideast and Asia, and has over 100,000 employees. BRF produces over 4 million metric tons of meat per year and sells its products to over 150 countries in the world. BRF has a history trading with China with more than 10 years. This mutually beneficial trade of meat products not only meets Chinese consumers' need of chicken legs, chicken wings and chicken paws which are short of domestic supply, but also provides Chinese customers with poultry products of low antibiotic residue, safe and reliable quality and stable supply.

巴西食品公司

巴西食品公司是一家总部位于巴西圣保罗的全球肉类生产企业，公司股票在圣保罗和纽约股票交易所上市。巴西食品公司是全球最大的禽肉生产企业，占全球禽肉供应量的14%，也是全球五大生猪繁育企业之一。公司在南美、欧洲、中东和亚洲拥有54家屠宰和加工厂，有超过十万名员工，年产肉类产品超四百万吨，销往全球150多个国家。巴西食品公司与中国的肉类贸易有十多年的历史。这种互利互惠的肉产品贸易不仅满足了国内消费者对其所偏好的、但国内供应不足的特定产品如鸡腿、鸡翅和鸡爪等的需求，也为中国客户提供了低抗生素含量、质量安全可靠、供应稳定的肉类产品。

Chuying Agro-Pastoral Group Co., Ltd.



of reserve meat!

Chuying Agriculture and Animal Husbandry Group, taking it as its own duty that let Chinese people eat safe meat, is committed to carrying out strategic layout dominated by pig-breeding whole industry chain. Currently, it has established core strategy including three blocks of pig breeding, food trade and Internet, and has developed into a modern large-scale enterprise group with complete industrial chain system such as food trade, feed production, breeding of improved variety, pig breeding, slaughtering and processing, cold chain logistics, terminal sales, online business, etc.

Chuying Agriculture and Animal Husbandry Group adheres to enterprise mission of "developing ecological industry and leading fashionable life", grasp the trend of consumer demand and create its meet brand of "Chumuxiang". At present, it has formed three major-type product systems of fresh frozen food, meat product and high-end fermented ham, and devoted itself to delivering green, safe and healthy food to kitchens and dining-tables at home and abroad.

雏鹰农牧集团股份有限公司

雏鹰农牧集团股份有限公司始创于1988年，2010年9月15日在深圳证券交易所成功挂牌上市（股票代码：002477），被业界誉为“中国养猪第一股”。雏鹰农牧集团是农业产业化国家重点龙头企业、中国质量诚信企业，并承载着中央储备肉活畜储备基地的重任！

雏鹰农牧集团以让国人吃上安全肉为己任，致力于开展以生猪养殖全产业链为主导的战略布局，目前确立了包括生猪养殖、粮食贸易、互联网三大板块的核心战略，已发展成为拥有粮食贸易、饲料生产、良种繁育、生猪养殖、屠宰加工、冷链物流、终端销售、线上业务等完整产业链体系的现代化大型企业集团。

雏鹰农牧集团秉承“发展生态农业，引领时尚生活”的企业使命，把握消费者需求趋势，打造旗下“雏牧香”肉类品牌，目前已形成鲜冻品、肉制品、高端发酵火腿三大类产品体系，致力于将绿色、安全、健康的食品送上国人的厨房、世界的餐桌

COFCO Meat Investment Co., Ltd.



中粮
COFCO
自然之源 重塑你我



COFCO Meat, is an investment and operation platform of meat products under COFCO Group. Its main business includes fresh pork with full-fledged supply chain, deep processing of chicken and meat import and distribution. At present, the company has nearly 9,000 employees.

COFCO Meat was registered and established in 2009. Its business achieved rapid expansion in a short period. Up to now, it has built up 3.65 million heads of pig breeding capacity, 2 million head slaughtering capacity, 55,000 tons of meat deep processing capacity in Jiangsu Dongtai, Hubei Wuhan, Tianjin, Jilin Songyuan, Inner Mongolia Chifeng, Shandong Weifang, Guangdong Heshan, etc.. It ranks no. 5 in large-scale pig breeding industry in China. In addition to its investment in pork and chicken business in China, COFCO Meat is the largest meat importer in China's main port. It has successfully accomplished State Reserve task many times. In 2017, it imported and distributed 85,000 tons of meat.

中粮肉食投资有限公司

中粮肉食是中粮集团旗下肉类产品的投资和经营平台，目前主营业务包括生猪全产业链、鸡肉深加工以及肉类的进口分销。目前公司员工总数近9000人。

中粮肉食注册成立于2009年，但在短短几年内实现了业务规模的迅速扩大。截至目前，在江苏东台、湖北武汉、天津、吉林松原、内蒙赤峰、山东潍坊、广东鹤山等地，建设了365万头的生猪养殖产能，200万头的生猪屠宰产能，5.5万吨的肉类深加工产能。是中国第五大规模化生猪养殖企业。除了在国内投资猪肉和鸡肉业务，中粮肉食还是中国主港最大的肉类进口企业，多次执行了国储任务，2017年进口分销肉类8.5万吨。

Ecolab



A trusted partner at more than one million customer locations, Ecolab (NYSE: ECL) is the global leader in water, hygiene and energy technologies and services that protect people and vital resources.

With 2016 sales of \$13 billion and 48,000 associates, Ecolab delivers comprehensive solutions and on-site service to ensure safe food, maintain clean environments, optimize water and energy use, and improve operational efficiencies for customers in the food, healthcare, energy, hospitality and industrial markets in more than 170 countries around the world.

Ecolab China Investment Co., Ltd. is the regional headquarters of Greater China. As we started the business in Greater China from 1975, Ecolab has established its leading position in China food safety and sustainable development with more than 30 years of local industry experience and solid scientific research ability. Since

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June 2015, Ecolab has acquired controlling interest in Jianghai Environmental Protection Co. Ltd. (Jianghai). By combining the strengths of both organizations, this acquisition solidifies Ecolab's position as an undisputed leader in industrial water treatment in Greater China.

Up to now, Ecolab have had nearly 3600 associates, 7 plants, 1 world-class innovation center, and more than 40 offices all around the Greater China region.

艺康（中国）投资有限公司

艺康集团（纽交所代码：ECL）是全球水、卫生和能源与技术服务领域的领导者，致力于保护与生命息息相关的重要资源。2016年，艺康集团销售额130亿美元，在全球拥有超过48,000名雇员。作为值得信赖的合作伙伴，艺康为全球170多个国家，分布于一百多万地区的食品饮料、医疗保健、能源、酒店和工业客户提供全方位的解决方案和现场服务，保障食品安全，维护清洁的环境，最大限度地优化水和能源的利用以提高运营效率。

艺康（中国）投资有限公司是艺康集团在中国设立的大中华区域总部。自1975年进驻大中华区，艺康凭借40余年服务本土市场的专业经验和雄厚的科研能力，奠定了中国食品安全和可持续发展领域的领先地位。2015年6月，艺康集团正式成为中国知名水处理公司江海环保的主要控股方，此举进一步加强了艺康集团在大中华区工业水处理领域的领导地位。

目前，我们共有近3,600名员工，7家生产基地，1所世界级研发中心，40余家办事处遍布全国各地。



Walmart Food Safety Collaboration Center

To progress China's food safety system, better serve Chinese consumers, and meet the needs of modern China, the Walmart Food Safety Collaboration Center (WFSCC) was officially launched by Walmart in October 2016 in Beijing. Providing a professional platform for interested parties to work together to address food safety issues, the WFSCC is committed to becoming a leader in China's food safety, and actively cooperates with universities, industry associations, enterprises, and government, bringing together leading researchers, scholars, and innovators from China and around the world to accelerate food safety development in China. The WFSCC focuses on three key pillars: innovation, education, and policy support. Walmart and the Walmart Foundation are committed to investing \$25 million within 5 years for food safety research projects to help improve food safety in China. To honor Walmart's commitment to improving food safety in China, the Center established a Board of Experts in March 2017. The Board of Experts convenes the foremost thinkers and leaders in food safety in China and abroad. As food consumption habits change in the rapidly-developing Chinese market, the Center works with the Board to identify food safety problems and propose pragmatic and effective solutions.

沃尔玛食品安全协作中心

为确保中国食品安全体系稳步发展、更好地服务中国消费者并满足现代中国的需求，沃尔玛食品安全协作中心(以下简称“中心”)作为沃尔玛的一项全新举措于 2016 年 10 月在中国北京正式启动。以建造专业化平台，推动相关方通力合作解决食品安全系统性问题，致力于成为中国食品安全领域的领导者为愿景，中心积极建立与高校、行业协会、企业与政府之间的合作，与国内外顶尖专家和行业利益相关方通力协作，促进中国食品安全水平的不断提升。中心的工作聚焦三大领域：食品安全科技创新、食品安全教育以及支持食品安全政策建设。沃尔玛和沃尔玛基金会承诺在五年间投资 2500 万美元用于食品安全领域各类研究项目，助力提升中国食品安全水平。中心于 2017 年 3 月成立专家委员会。该委员会聚集了中外食品安全领域的优秀思考者和领导者，中心将与他们一道，为经济高速发展、食品消费习惯不断变化的中国市场持续甄别其特有的食品安全问题并提出务实有效的解决方案。

Moving Floor AB



Moving Floor AB is a manufacturer of automatic cleaning for pigs and cattle. The automatic cleaning is done minimum 15 times per day which provides clean and healthy animals that grow quicker (up to 30%) with significantly less use of antibiotics. The cleaning is done without using any water, saving up to 150 liters of water per pig per day. When no water is added to the feces it is much easier to use it for biogas, composting or transporting it for spreading on the field. The modular system is installed in old or new barns and the quick manure removal gives a 95% reduction of ammonia within the barn. This new system is patented and Moving Floor AB is the only company in the world providing automatic cleaning of the animal's living area. Moving Floor can provide a structural change of the animal husbandry – increasing efficiency and profitability but at the same time also improving animal welfare and decreasing negative environmental impact.

活动地板 AB 公司

活动地板 AB 是为猪和牛自动清洁的制造商。活动地板每天自动清洁至少 15 次，可以保持动物健康清洁，使其可以更快地成长（高达 30%），同时显著减少抗生素的使用。无需用水即可完成清洁，每天每头猪可节省 150 升用水。当粪便中没有加入水时则更容易用于沼气，堆肥或运输到田地上播撒。模块化系统可以安装在旧的或新的畜牧棚中，快速清除粪便可使畜牧栏中的氨气减少 95%。这个新系统已经获得专利，活动地板 AB 是世界上唯一一家提供自动清洁动物生活区域的公司。活动地板可以改变畜牧业的结构 – 提高效率 and 盈利能力，同时改善动物生活环境并减少对环境的负面影响。

SVA JEAN ROZE – France

With more than 2870 employees and almost 140,000 tonnes of animal weight slaughtered, SVA Jean Rozé and its subsidiaries are one of the leaders in the meat processing market. Created in 1955 on the foundations of a family business, it grew rapidly through a proactive policy that combined high technology and innovation.

SVA Jean Rozé has always aimed to support and guide breeding management toward the quality expected by consumers. It achieves this by procuring its supplies from loyal, regular suppliers who are fully aware of its requirements and needs.

We have developed a comprehensive range of processed products (Beef, veal and lamb) that meet all the market's expectations: supermarket, distribution, catering, manufacturers and export market.

We have 2 slaughtering sites, 4 processed product subsidiaries, 2 waste and by-product treatment subsidiaries and 12 logistics bases throughout France.

CIMIW Executive Roundtable

David E. Williams
Director of Global Proteins



Agribusiness intelligence



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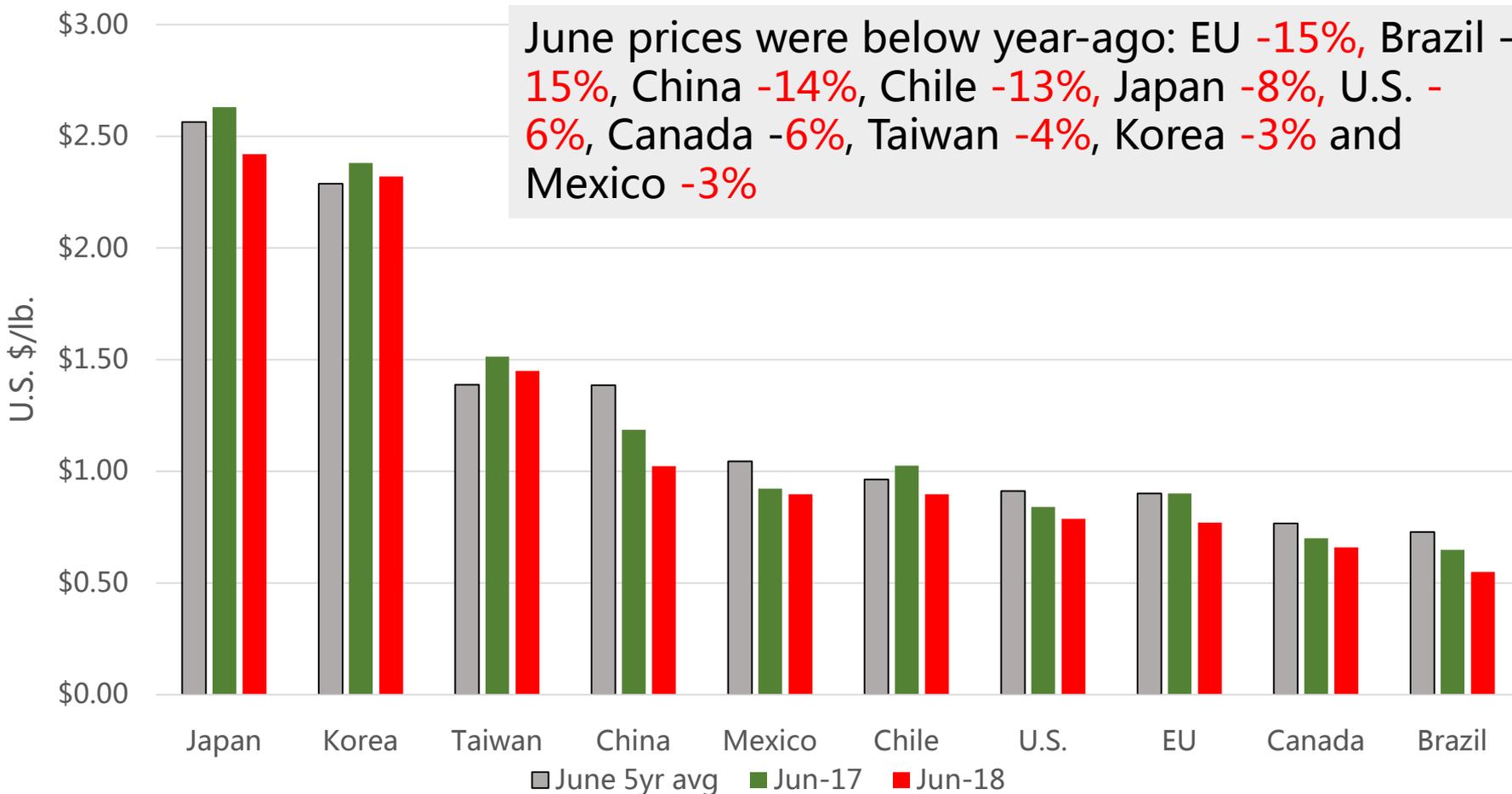
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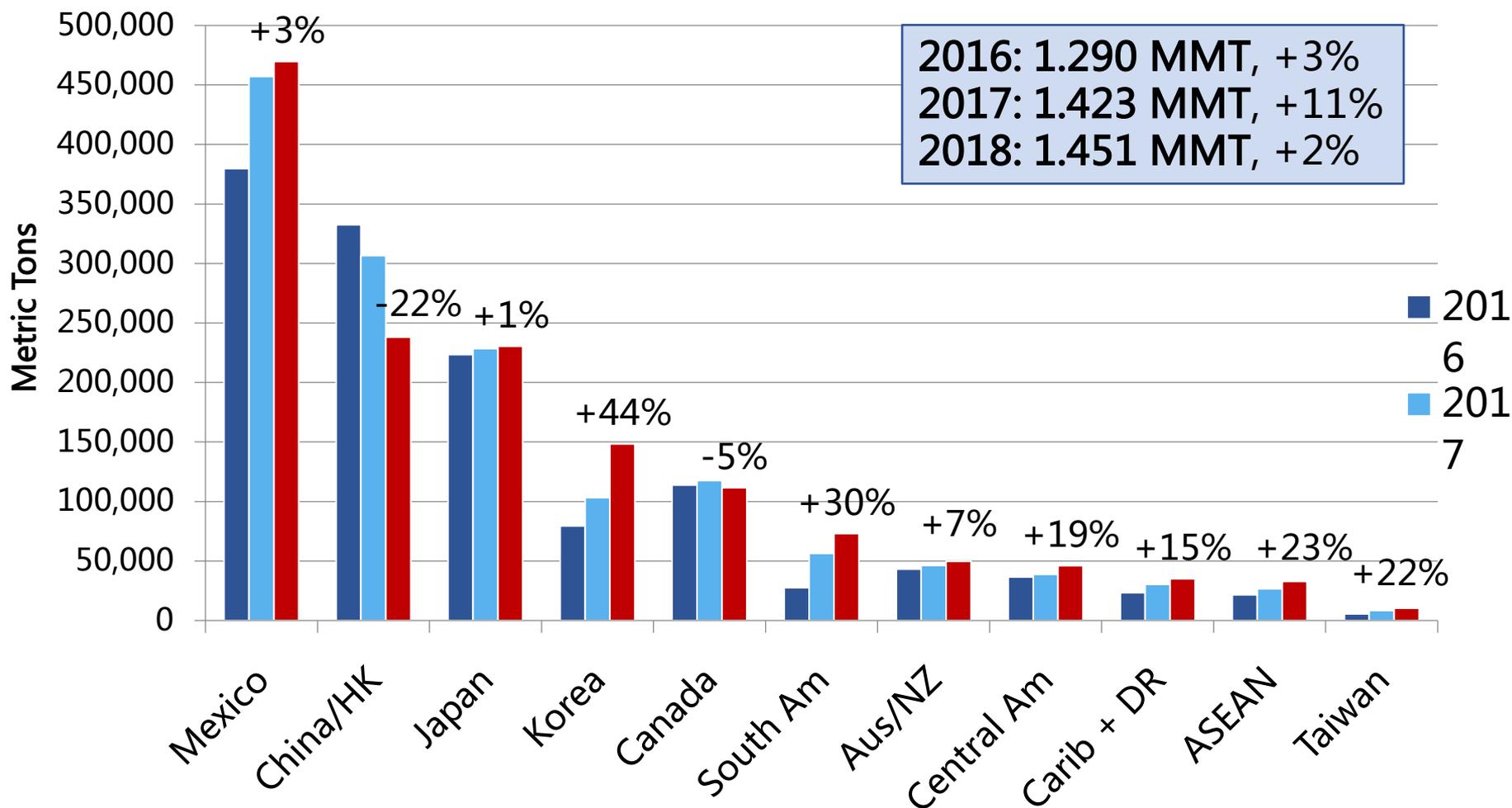
China Grain and Meat Imports: More Demand for Meat Imports?



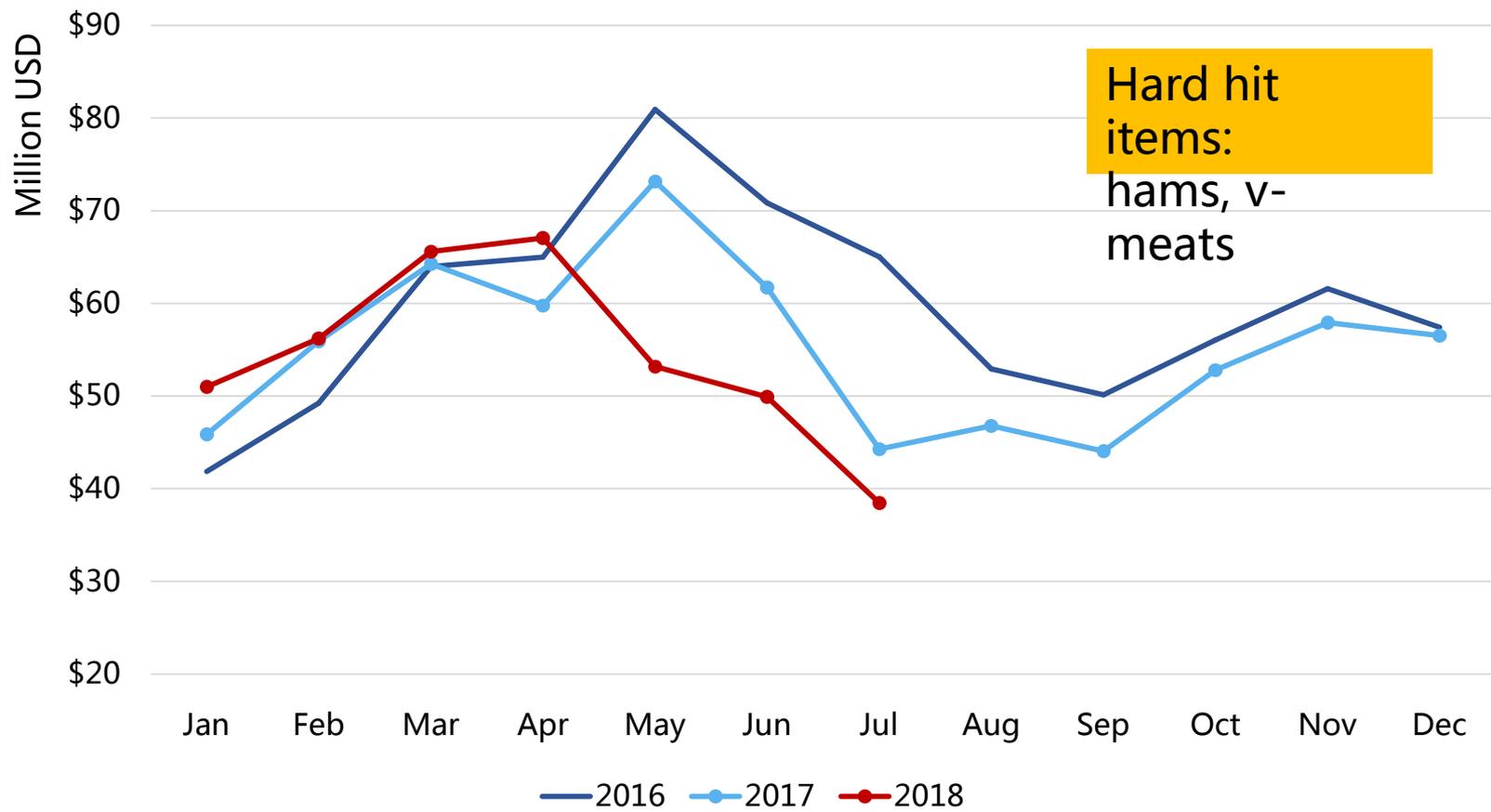
Estimated Carcass Prices



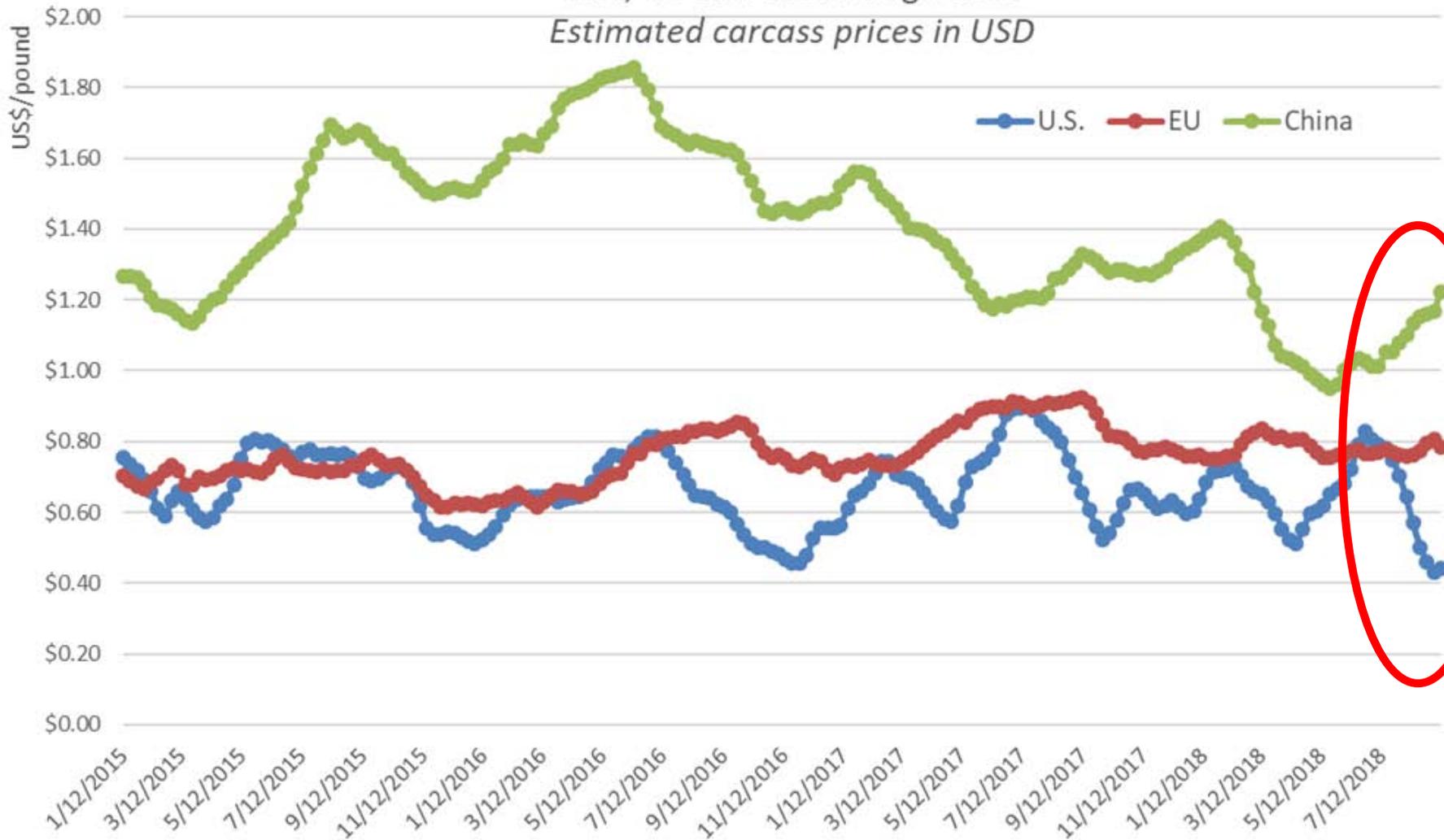
January – July Exports



U.S. Pork & Variety Meat Exports to China

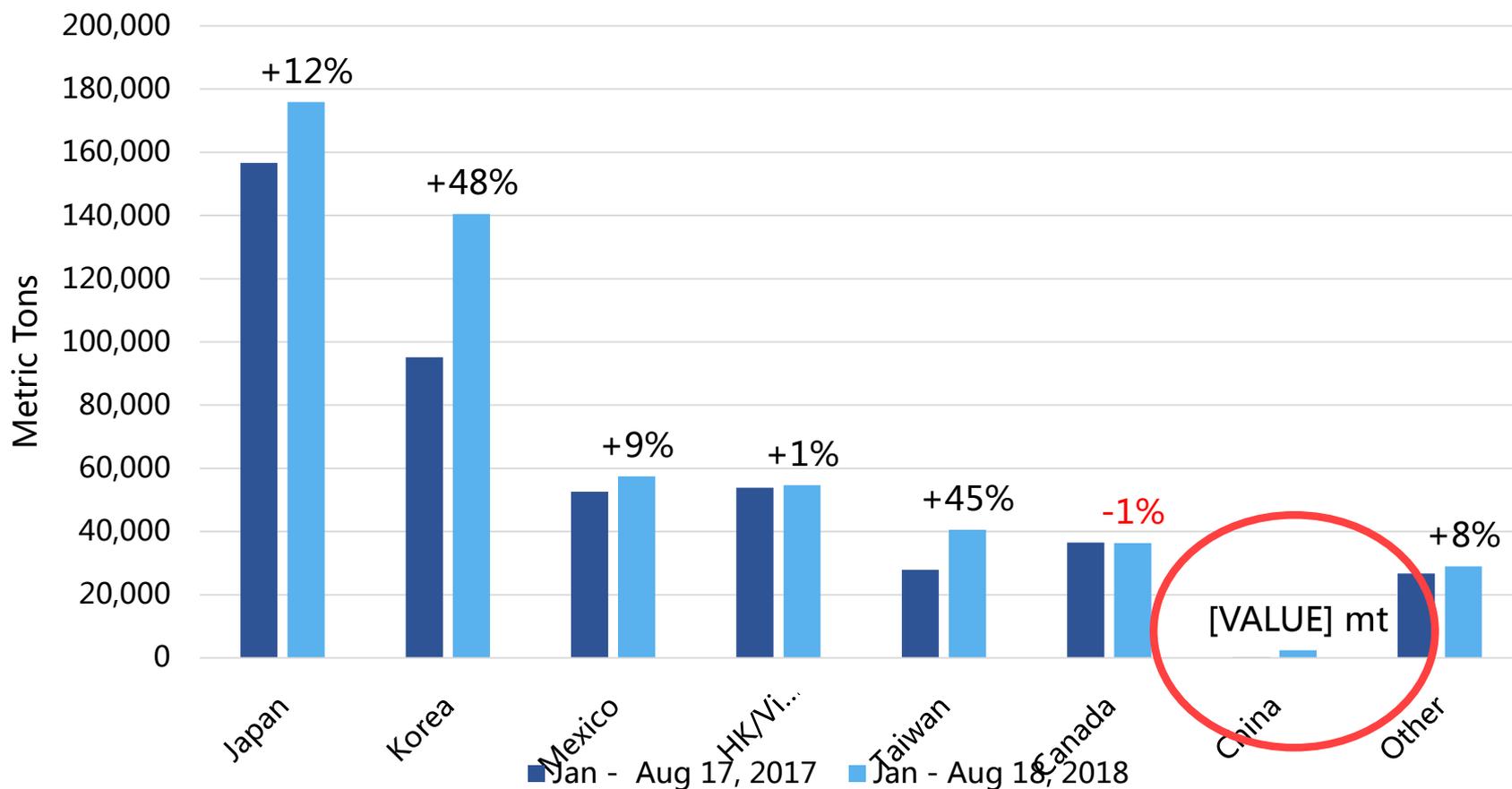


U.S., EU and China Hog Prices
Estimated carcass prices in USD

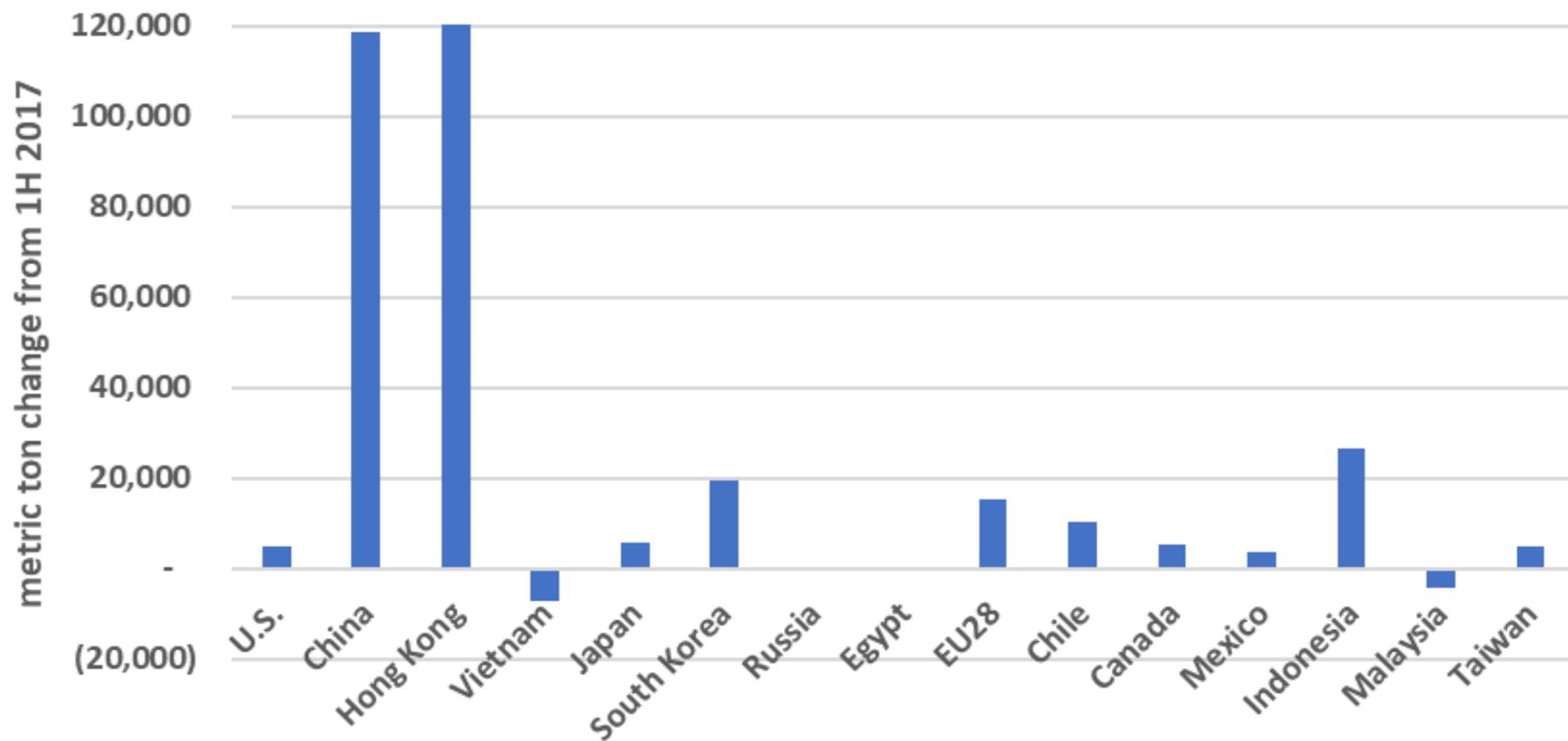


Accumulated Weekly Beef Exports

Whole muscle cuts as reported to FAS



Growth in First Half Beef Imports



EU Beef/Veal and Pork Market Situation

Jos GOEBBELS

UECBV Vice-President, COV President

Meat Industry Executive Roundtable & AFP Program, Beijing, China

What is UECBV?

Today, **UECBV** represents **53 associations** out of:

- **24 EU Member States** as well as certain EFTA countries and **EU candidate countries (Turkey)**.
- Other countries, EU trade partners in the meat sector, are also associated to the UECBV (**Japan, Russia and Ukraine**)

3 European Associations

Livestock markets (AEMB)
Casings industry (ENSCA)
Ship suppliers (OCEAN)

In total, some **20,000 firms** of all sizes and over **230,000 jobs** are represented within the UECBV through its national member federations.

It represents the national federations of the:

- livestock traders
- livestock markets
- meat industry: slaughterhouses, cutting and preparation plants
- wholesale meat traders
- international meat traders



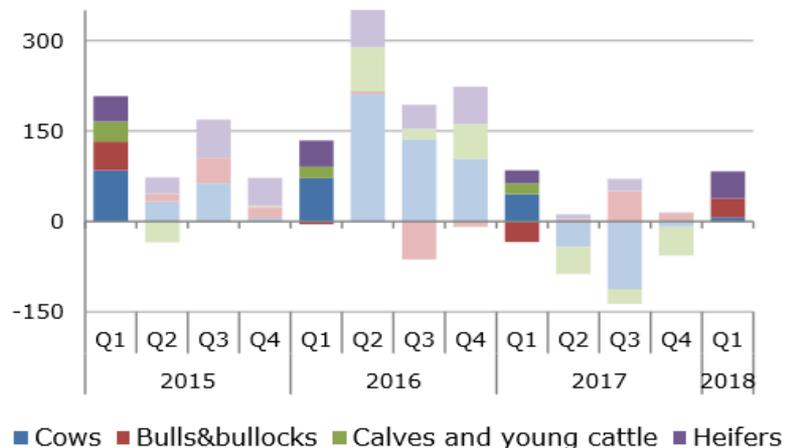
EU beef & veal market situation – production and prices

- There was a small decrease in the EU cow herd in 2017 (**by 1%**), primarily in the Western European countries.
- **Two thirds of the beef/veal production** came from the dairy herd in 2017.
- The increase in the number of heads slaughtered refers mainly to males and heifers. Slaughtering of cows also increased considerably (drought effect).
- The forecast: the EU net beef/veal production will **slightly rise in 2018 by 0.5%**, and slightly drop by **0.6% in 2019**.
- The EU price situation is now better than in 2017.

Market developments in the EU

	2017	2018
		
Production	➡ +0.1%	➡ +0.5%

Year-on-year changes in EU beef/veal slaughterings by category (1,000 heads)



Source: DG Agriculture and Rural Development, based on Eurostat



EU beef & veal market situation – trade and consumption

- Key EU trade partners are **focused on the Mediterranean area: Turkey, Lebanon, Libya and Israel** were important destinations. Exports to Algeria doubled.
- Five countries account for more than half of the EU exports.
- The forecast is that **exports will decrease** in the second half of 2018 and will stabilise in 2019.
- The forecast is an increase of imports by 8% in 2018. **Three quarters of EU imports** will come from South America.
- Beef/Veal consumption will slightly rise in 2018 by **0.7% to reach 10.9 kg per capita (boneless weight)**.

EU beef/veal exports

Destinations	2014		2015		2016		2017		Jan-Jun 18	
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%
Hong Kong	28 573	8.2%	65 112	14.6%	45 198	10.8%	58 416	12.1%	36 082	14.7%
Turkey	559	0.2%	1 280	0.3%	9 482	2.3%	10 751	2.2%	22 508	9.2%
Ghana	40 878	11.8%	33 255	7.5%	37 364	8.9%	35 340	7.3%	19 549	7.9%
Ivory Coast	21 619	6.2%	28 839	6.5%	35 740	8.5%	36 713	7.6%	18 724	7.6%
Bosnia-Herz.	21 870	6.3%	31 821	7.1%	36 593	8.7%	36 850	7.6%	14 931	6.1%
Philippines	2 534	0.7%	11 630	2.6%	13 053	3.1%	24 247	5.0%	13 728	5.6%
Switzerland	25 817	7.4%	25 730	5.8%	25 009	6.0%	24 435	5.1%	11 789	4.8%
Israel	4 224	1.2%	3 855	0.9%	6 087	1.5%	15 137	3.1%	10 258	4.2%
Angola	10 589	3.0%	14 587	3.3%	9 643	2.3%	13 549	2.8%	7 559	3.1%
Algeria	3 135	0.9%	4 227	0.9%	6 662	1.6%	10 726	2.2%	6 988	2.8%
South Africa	3 339	1.0%	1 325	0.3%	7 481	1.8%	7 361	1.5%	6 906	2.8%
Norway	10 217	2.9%	7 872	1.8%	19 122	4.6%	18 315	3.8%	6 351	2.6%
Chile	1	0.0%	27	0.0%	50	0.0%	2 228	0.5%	6 320	2.6%
For./Rep Mac	10 315	3.0%	10 994	2.5%	12 375	3.0%	11 451	2.4%	4 740	1.9%
Ukraine	2 870	0.8%	2 498	0.6%	2 747	0.7%	7 094	1.5%	4 202	1.7%
China	7 228	2.1%	8 242	1.9%	6 027	1.4%	10 804	2.2%	3 501	1.4%
Vietnam	3 175	0.9%	6 410	1.4%	11 627	2.8%	22 252	4.6%	2 927	1.2%
Other Destinations	150 312	43.3%	187 568	42.1%	134 124	32.1%	136 176	28.3%	48 846	19.9%
Extra-EU	347 252		445 272		418 383		481 846		245 908	
% change			+28%		-6%		+15%		-8.6%	

EU beef imports

Origins	2014		2015		2016		2017		Jan-Jun 18	
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%
Brazil	145 435	43.5%	144 259	43.4%	136 803	42.3%	140 291	42.0%	67 583	41.3%
Argentina	47 976	14.3%	42 074	12.7%	42 149	13.0%	43 558	13.0%	31 241	19.1%
Uruguay	51 377	15.4%	49 043	14.8%	46 287	14.3%	56 703	17.0%	27 221	16.6%
Australia	28 074	8.4%	32 653	9.8%	30 884	9.6%	27 794	8.3%	10 390	6.3%
USA	22 297	6.7%	23 234	7.0%	24 132	7.5%	20 482	6.1%	9 029	5.5%
New Zealand	13 827	4.1%	14 432	4.3%	11 380	3.5%	9 906	3.0%	4 361	2.7%
Paraguay	0	0.0%	0	0.0%	1 915	0.6%	5 947	1.8%	3 272	2.0%
Namibia	11 113	3.3%	9 994	3.0%	12 112	3.7%	10 685	3.2%	3 060	1.9%
Botswana	6 280	1.9%	6 424	1.9%	9 258	2.9%	9 382	2.8%	2 836	1.7%
Switzerland	4 284	1.3%	5 456	1.6%	5 090	1.6%	5 500	1.6%	2 616	1.6%
Serbia	619	0.2%	425	0.1%	439	0.1%	557	0.2%	632	0.4%
Canada	965	0.3%	780	0.2%	428	0.1%	421	0.1%	502	0.3%
Japan	3	0.0%	100	0.0%	359	0.1%	578	0.2%	297	0.2%
Other Origins	2 379	0.7%	3 487	1.0%	1 810	0.6%	2 063	0.6%	729	0.4%
Extra-EU	334 630		332 362		323 043		333 868		163 769	
% change			-1%		-3%		+3%		+14.2%	



EU pork market situation – production and prices

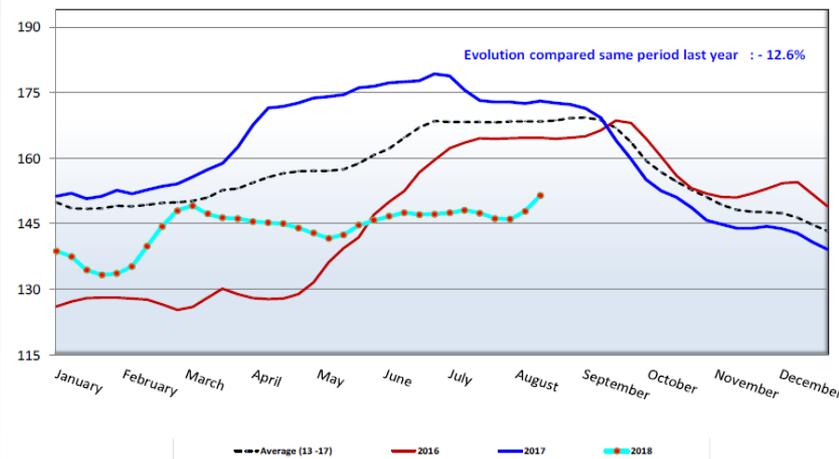
- 150 million heads in the EU in 2017, an increase by 2% in comparison with 2016.
- EU pig meat production decreased by 0.9% in 2017.
- EU pig meat production rose by 4.1% in tonnes in the first quarter of 2018 compared with the same timeline of 2017.
- However, this growth in Q1 2018 is likely to moderate due to lower prices. Therefore, the forecast for 2018 is an overall production rise by 1.5%. Stabilisation is expected in 2019.
- EU prices have decreased. EU prices remain well below the last 4-year average.

Market developments in the EU

	2017	2018
		
Production	 -0.9%	 +1.5%

EU evolution of the EU pig carcass prices (average class E & S)
(€/ 100kg/cw)

Week 33 latest price ==> 151.40 EUR/100 kg/cw



EU pork market situation – trade and consumption

- The EU remains the **world's first exporter of pork and pork products**. The trade balance of pig meat is positive.
- In the last years, the main driver of EU pork exports was the fact that China had imported more. However, since 2017, EU shipments to China have been decreasing. This trend should continue in 2018, but has slowed down since June.
- **More than half of the exports from the EU go to China, Japan and South Korea.**
- The forecast is that EU pig meat exports will increase by 2.5% in 2018 and stabilise in 2019.
- EU pork imports remain very low, but have increased in the last couple of years.
- Pig meat consumption in the EU remained stable in 2017 and reached **32.2 kg per capita** (boneless weight).
- The forecast is that consumption will slightly increase in 2018 to reach **32.5 kg per capita**.

	2014		2015		2016		2017		Jan-Jun 18	
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%
China	717 033	23.6%	1 141 325	33.9%	1 866 355	44.9%	1 398 470	36.5%	680 458	35.2%
Japan	347 721	11.5%	364 746	10.8%	405 335	9.8%	425 910	11.1%	231 734	12.0%
South Korea	227 825	7.5%	241 569	7.2%	260 726	6.3%	274 966	7.2%	176 677	9.1%
Philippines	202 522	6.7%	191 876	5.7%	216 022	5.2%	250 213	6.5%	143 103	7.4%
Hong Kong	408 183	13.5%	292 391	8.7%	362 492	8.7%	381 013	9.9%	115 032	5.9%
USA	90 985	3.0%	105 123	3.1%	116 806	2.8%	155 527	4.1%	93 219	4.8%
Australia	73 156	2.4%	102 645	3.0%	101 198	2.4%	95 308	2.5%	48 717	2.5%
Ukraine	106 780	3.5%	96 631	2.9%	75 674	1.8%	88 106	2.3%	45 294	2.3%
Serbia	62 905	2.1%	47 488	1.4%	41 128	1.0%	55 052	1.4%	38 207	2.0%
Vietnam	16 056	0.5%	38 290	1.1%	53 483	1.3%	41 549	1.1%	31 873	1.6%
Taiwan	52 970	1.7%	53 701	1.6%	47 865	1.2%	64 392	1.7%	30 744	1.6%
Singapore	40 265	1.3%	40 937	1.2%	39 994	1.0%	37 611	1.0%	22 245	1.1%
Other	687 432	22.7%	651 540	19.3%	569 411	13.7%	565 638	14.8%	277 783	14.4%
Extra-EU	3 033 833		3 368 260		4 156 490		3 833 754		1 935 084	
% change			+ 11%		+ 23%		- 8%		+ 0.6%	

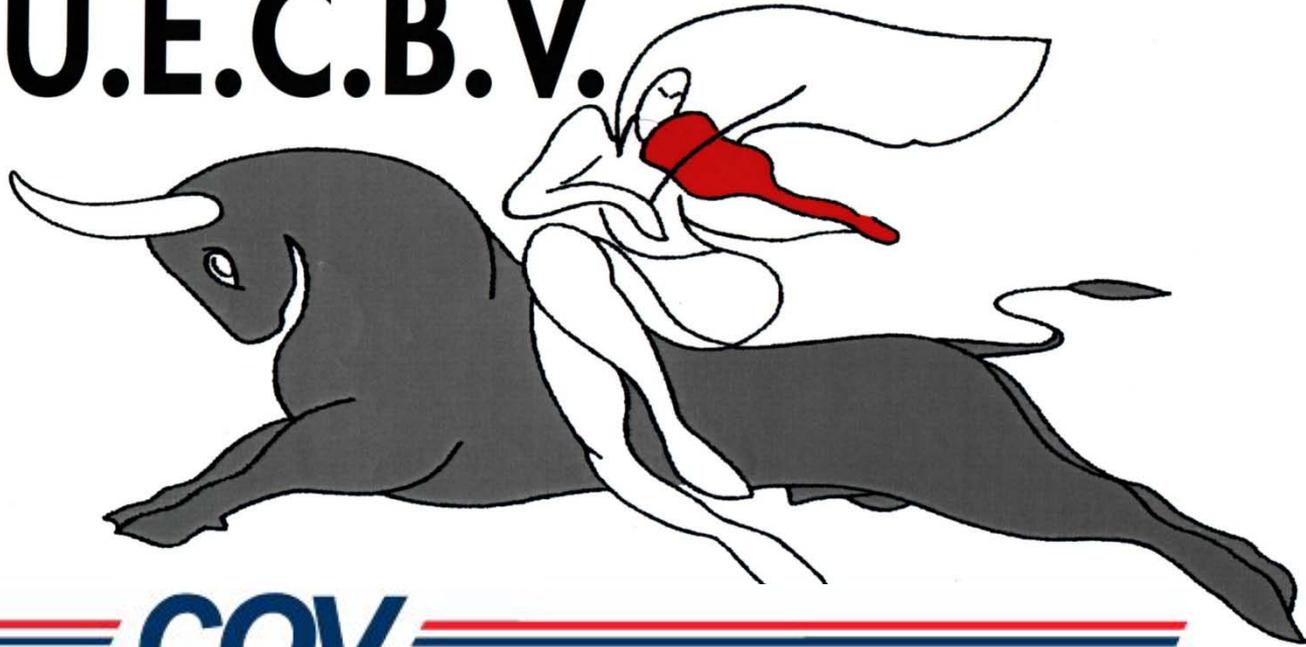
	2014		2015		2016		2017		Jan-Jun 18	
	tonnes	%	tonnes	%	tonnes	%	tonnes	%	tonnes	%
Switzerland	18 207	52%	20 225	61%	22 257	68%	22 922	63%	10 233	58%
Serbia	3 662	10%	1 819	5%	614	2%	2 694	7%	1 611	9%
Norway	3 192	9%	2 315	7%	1 989	6%	2 287	6%	1 527	9%
Chile	3 416	10%	2 896	9%	2 958	9%	2 434	7%	1 374	8%
USA	1 498	4%	1 769	5%	1 711	5%	1 707	5%	819	5%
China	917	3%	380	1%	250	1%	1 315	4%	453	3%
Other	4 353	12%	3 663	11%	3 010	9%	2 994	8%	1 486	8%
Extra-EU	35 245		33 066		32 788		36 351		17 503	
% change			- 6%		- 1%		+ 11%		- 0.8%	



Challenges for European meat industry

- Sustainability
- Welfare
- Circular production

U.E.C.B.V.



COV Dutch Meat Association (COV)

Thank you very much for your attention!



2018

中国肉类行业发展概览

中国肉类协会进出口商分会会长 / 马杰



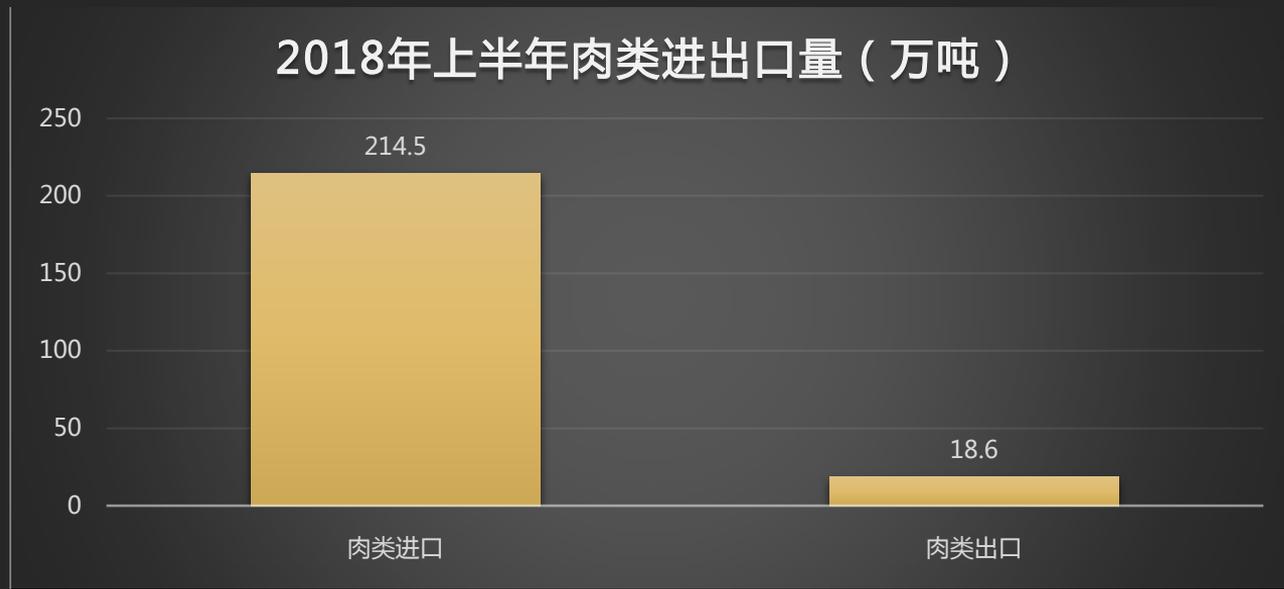
中国肉类生产和消费需求持续上升

2018年上半年国家统计局公布数据





中国肉类生产和消费需求持续上升





中国肉类市场的变化特点



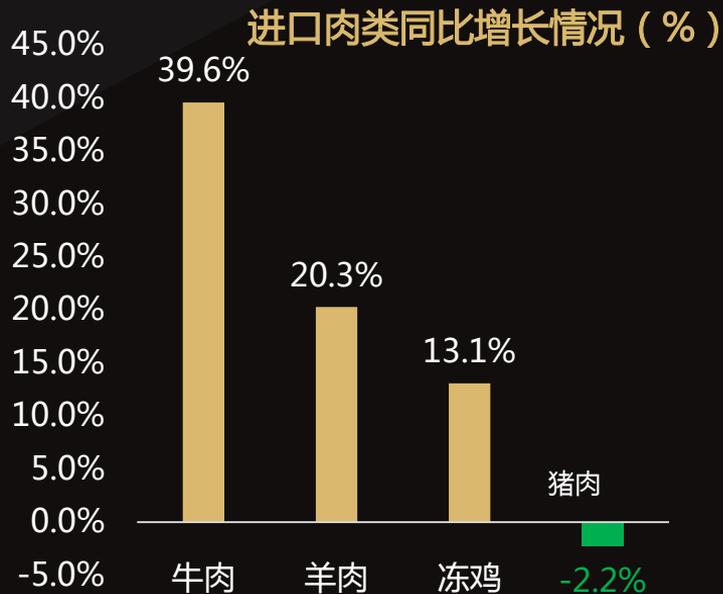
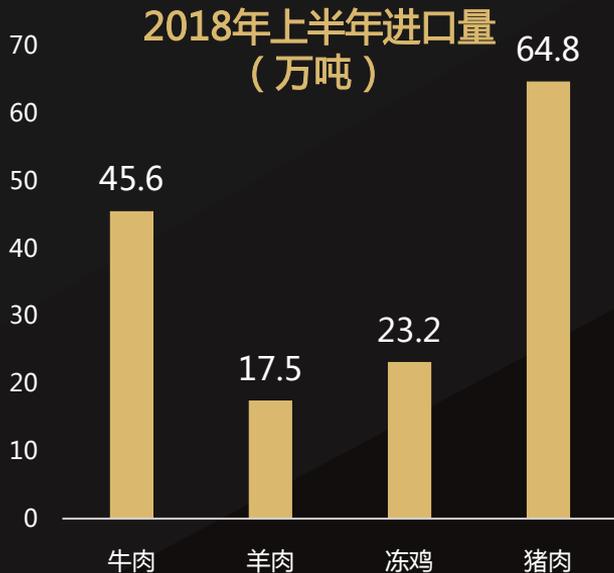
(一) 需求结构进一步调整：
猪肉下降，牛羊禽肉上升。



(二) 价格走势不同：
牛、猪价格走低，羊、鸡价格走高。

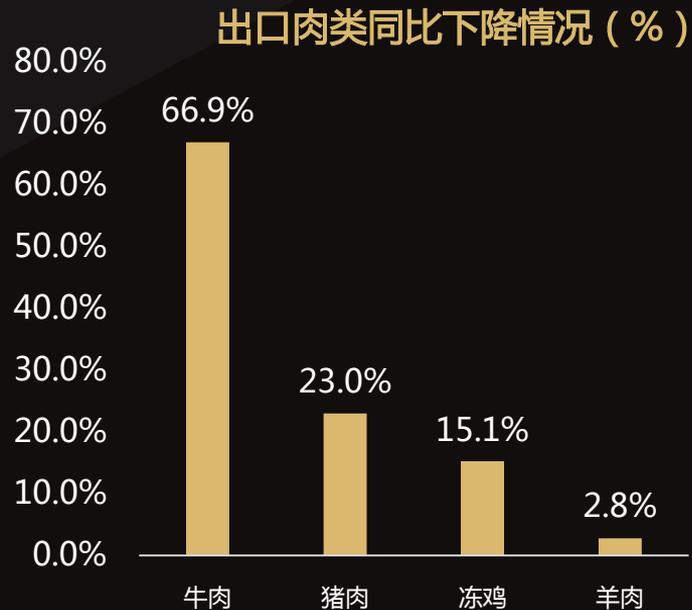
01

需求结构进一步调整：猪肉下降，牛羊禽肉上升



01

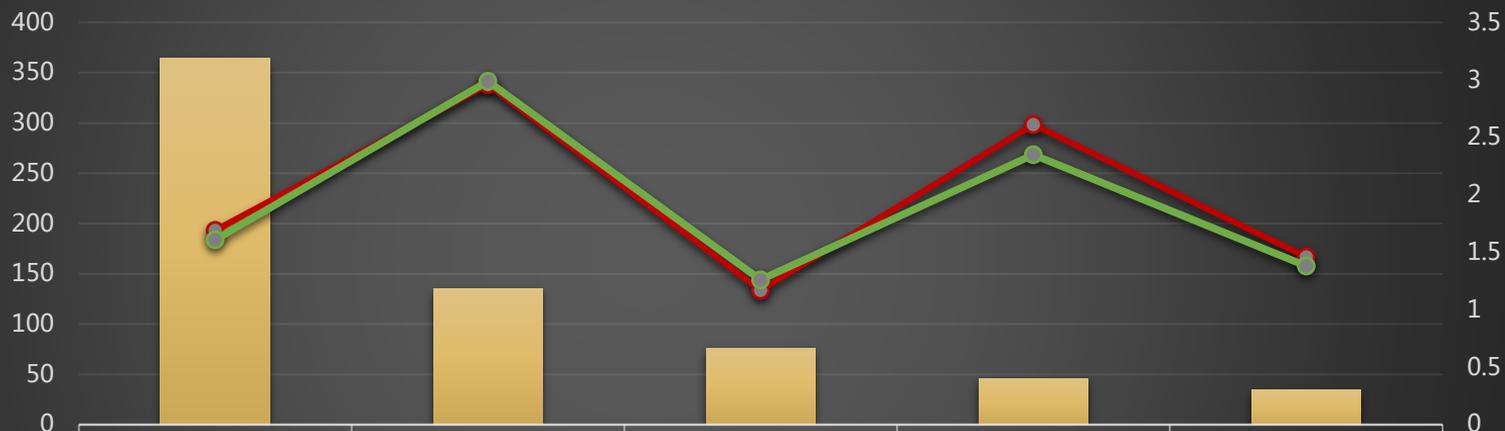
需求结构进一步调整：猪肉下降，牛羊禽肉上升



02

价格走势不同：牛、猪价格走低，羊、鸡价格走高

2018年上半年进口肉类情况



■ 进口金额 (亿元)

进口肉类

进口牛肉

进口猪肉

进口羊肉

进口冻鸡

● 平均吨价 (万元)

● 去年同期 (万元)

364.5

135.2

75.7

45.9

34.1

1.69

2.96

1.17

2.61

1.46

1.61

2.99

1.26

2.35

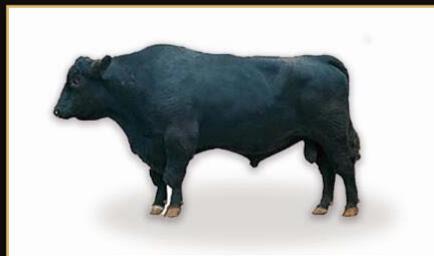
1.38



中国肉类市场供求结构

特点

牛肉、猪肉进口平均吨价下降，羊肉、冻鸡进口平均吨价上升，反映出当前中国肉类市场供求结构的特点——牛肉、猪肉市场竞争比较激烈，而羊肉、鸡肉的供应有所不足。





2018

谢谢观看



ABIEC

**CHINA
INTERNATIONAL
MEAT INDUSTRY
WEEK**

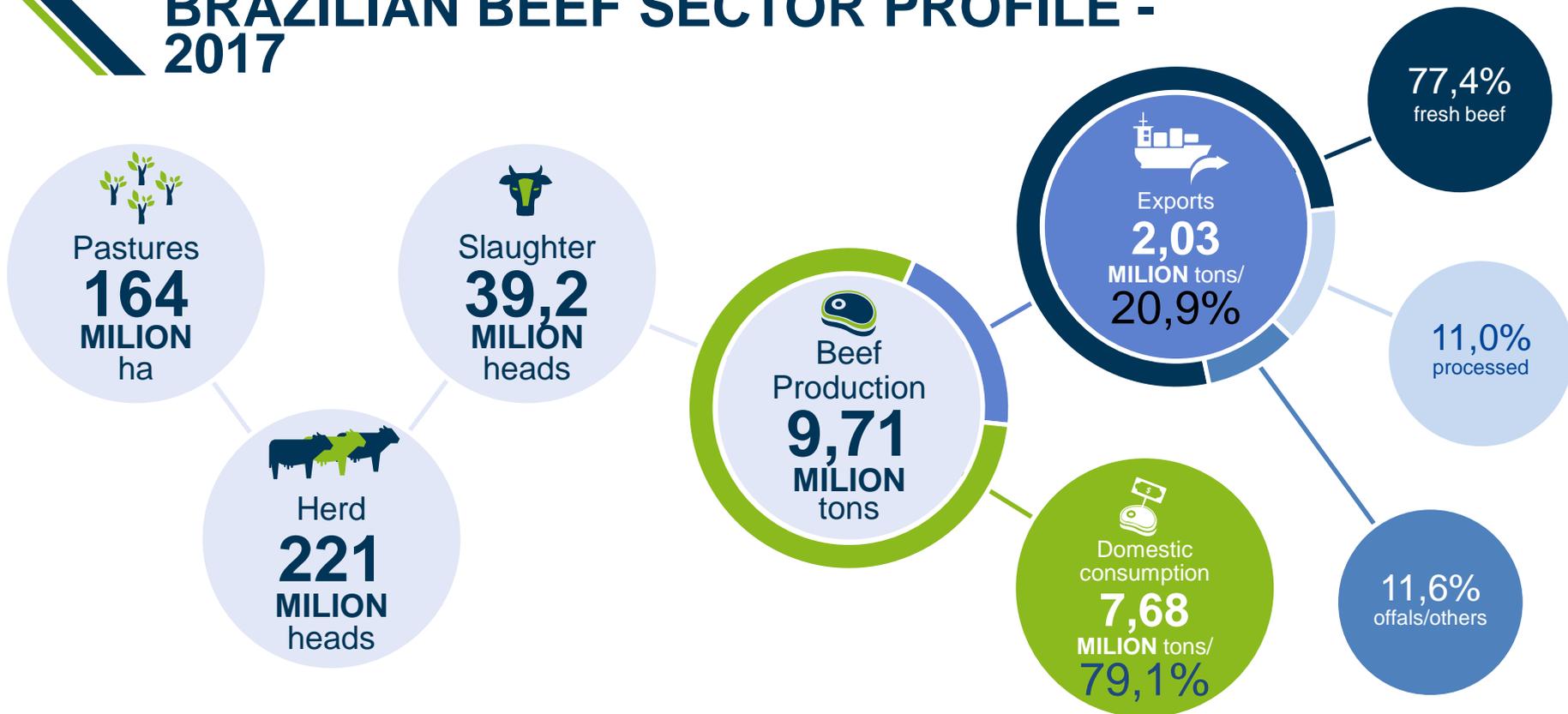
**Brazilian
Beef**

September, 2018

www.abiec.com.br

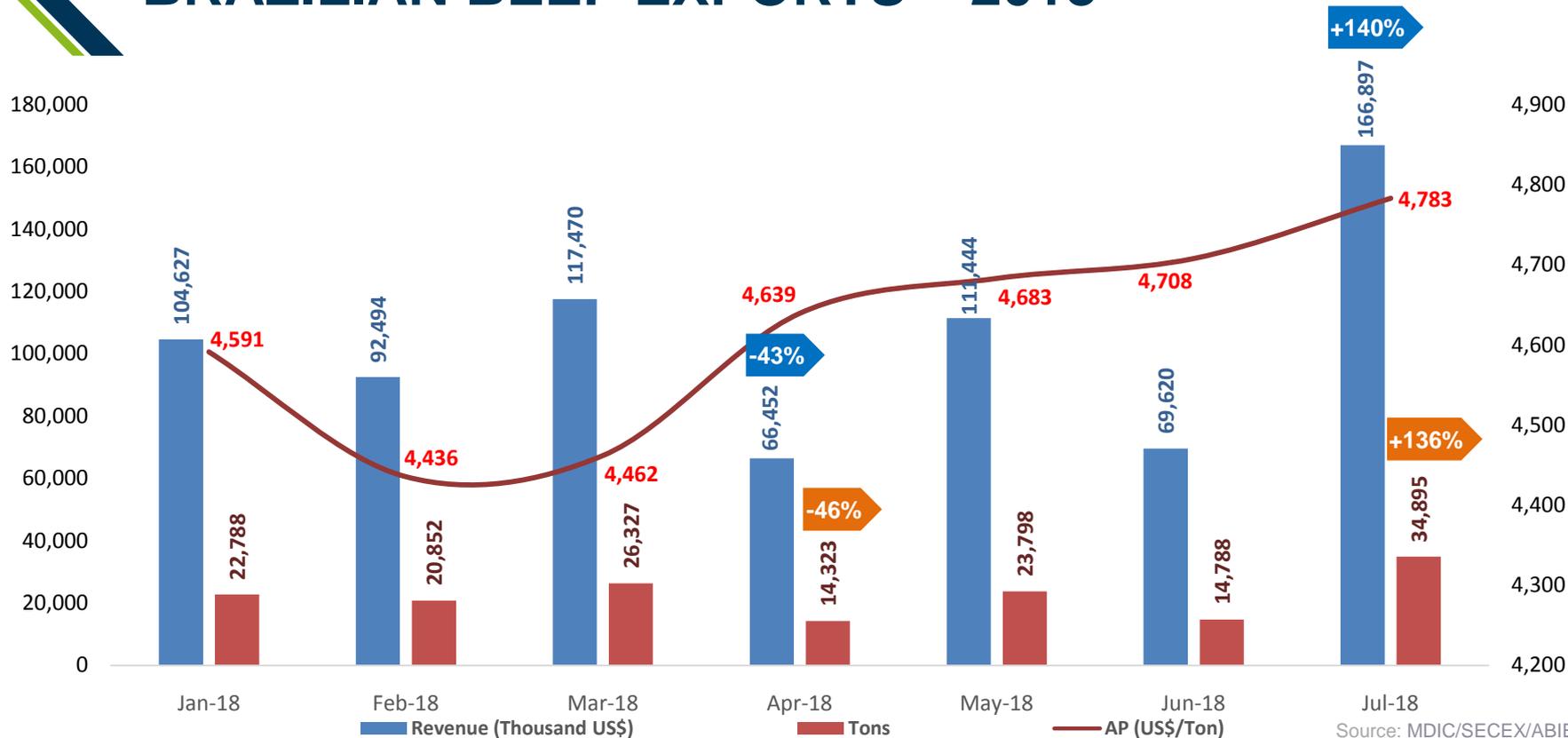


BRAZILIAN BEEF SECTOR PROFILE - 2017



Source: MDIC/SECEX/Agroconsult/ABIEC

BRAZILIAN BEEF EXPORTS – 2018

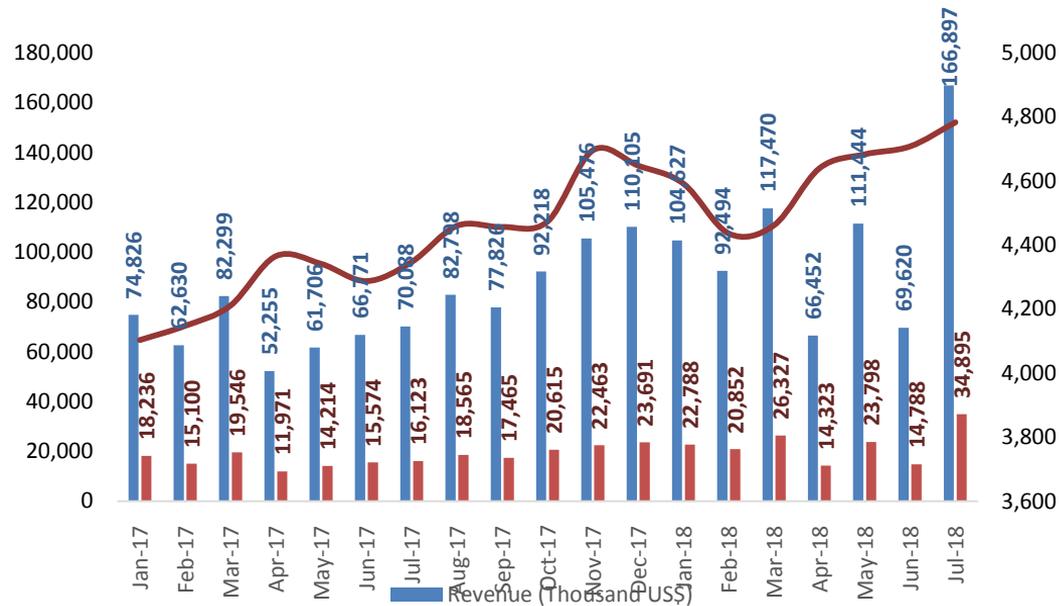


Source: MDIC/SECEX/ABIEC

BRAZILIAN BEEF EXPORTS TO CHINA - MONTHLY

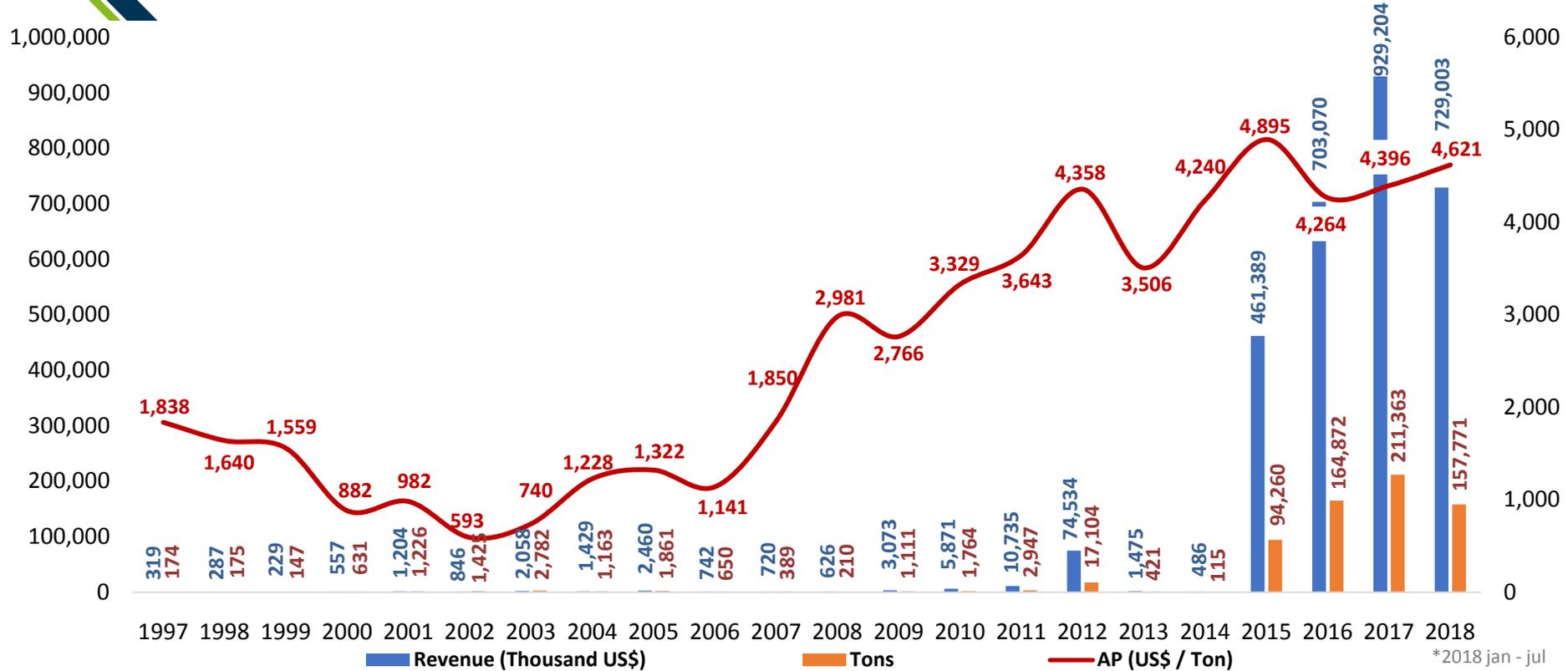


Month	Revenue (Thousand US\$)	Tons	AP (US\$/Ton)
jan/17	74.826	18.236	4.103
fev/17	62.630	15.100	4.148
mar/17	82.299	19.546	4.211
abr/17	52.255	11.971	4.365
mai/17	61.706	14.214	4.341
jun/17	66.771	15.574	4.287
jul/17	70.088	16.123	4.347
ago/17	82.798	18.565	4.460
set/17	77.826	17.465	4.456
out/17	92.218	20.615	4.473
nov/17	105.476	22.463	4.696
dez/17	110.105	23.691	4.648
Total 2017	938.999	213.563	4.378
jan/18	104.627	22.788	4.591
fev/18	92.494	20.852	4.436
mar/18	117.470	26.327	4.462
abr/18	66.452	14.323	4.639
mai/18	111.444	23.798	4.683
jun/18	69.620	14.788	4.708
jul/18	166.897	34.895	4.783
Total 2018	729.004	157.771	4.615

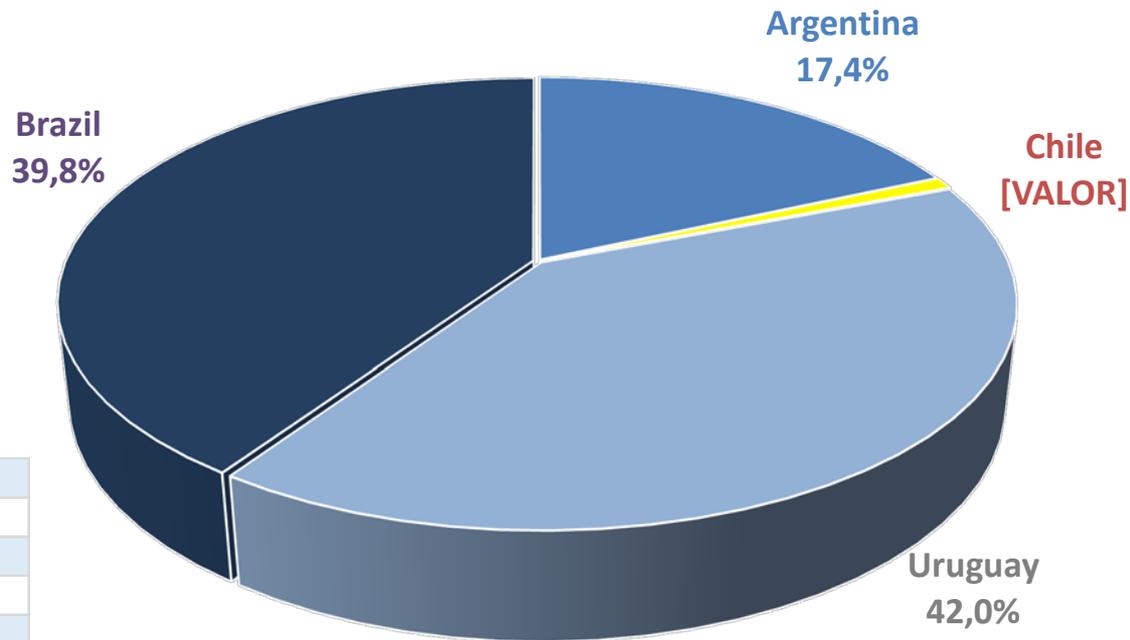


Source: MDIC/SECEx/ABIEC

HISTORY – BRAZILIAN BEEF EXPORTS TO CHINA



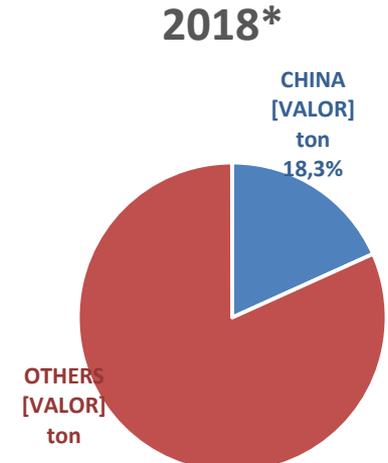
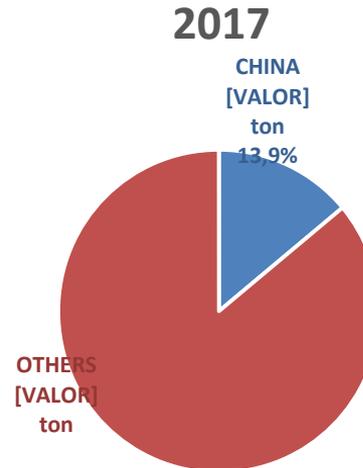
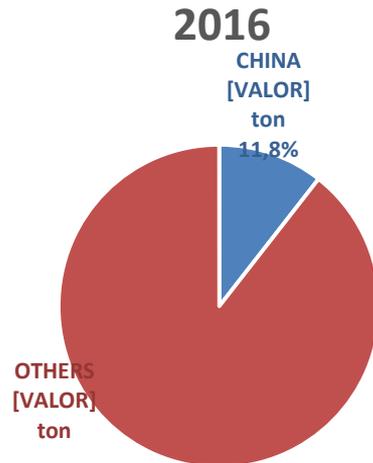
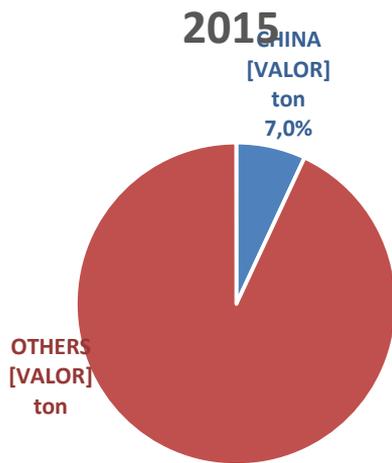
SOUTH AMERICA BEEF EXPORTS TO CHINA 2017 – THOUSAND TONS



Country	Value (Thousand Tons)	Percentage
Uruguay	208.302	42,0%
Brazil	197.565	39,8%
Argentina	86.334	17,4%
Chile	4.113	0,8%
TOTAL	496.314	100,0%

Source: UN comtrade/ABIEC

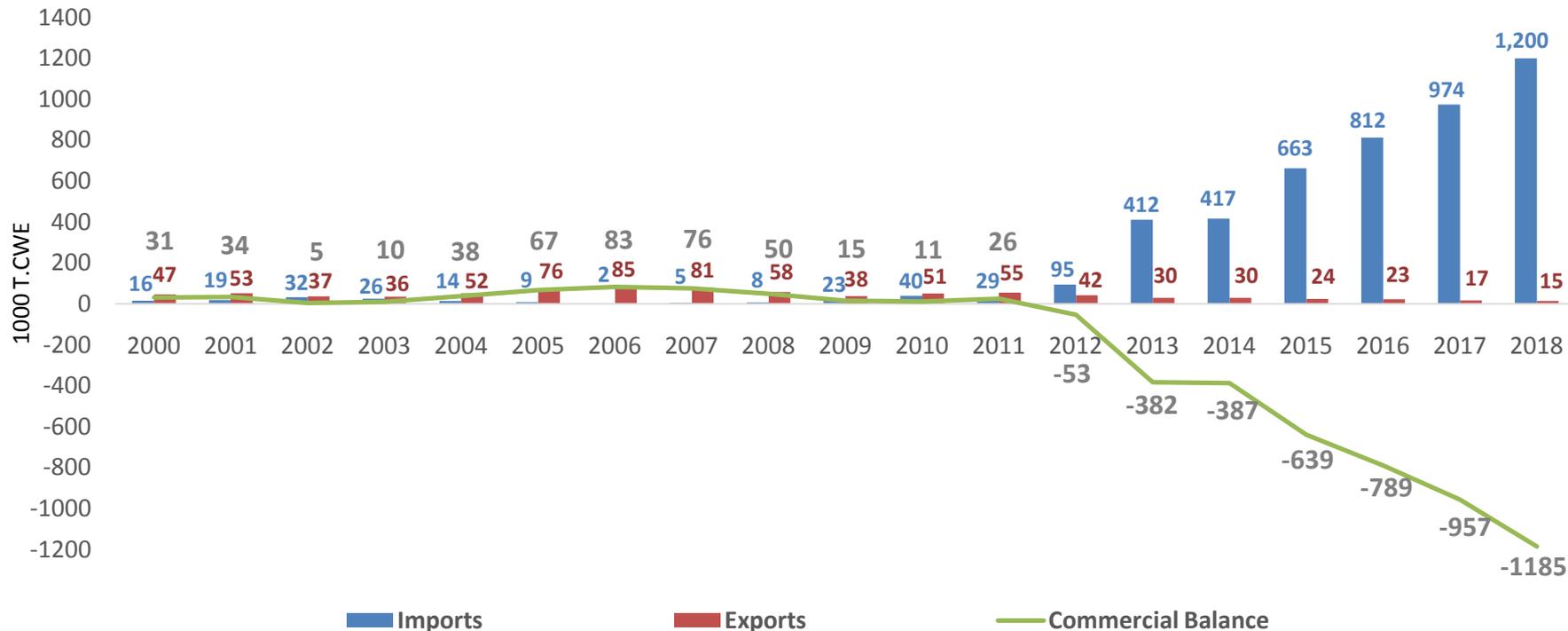
BRAZILIAN BEEF EXPORTS TO CHINA - SHARES



*Jan-Jul

Source: MDIC/SECEX/ABIEC

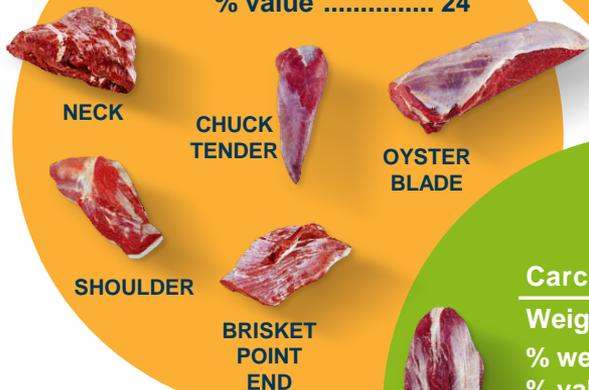
HISTORY OF CHINESE IMPORTS AND EXPORTS OF BEEF



ADDING VALUE

Carcass Zone III

Weight 52kg
 % weight 29
 % value 24



III

Carcass Zone IV

Weight 56kg
 % weight 31
 % value 18



IV

Carcass Zone I

Weight 26kg
 % weight 15
 % value 33



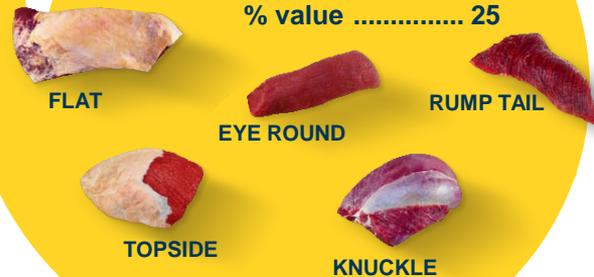
I

II

IV

Carcass Zone II

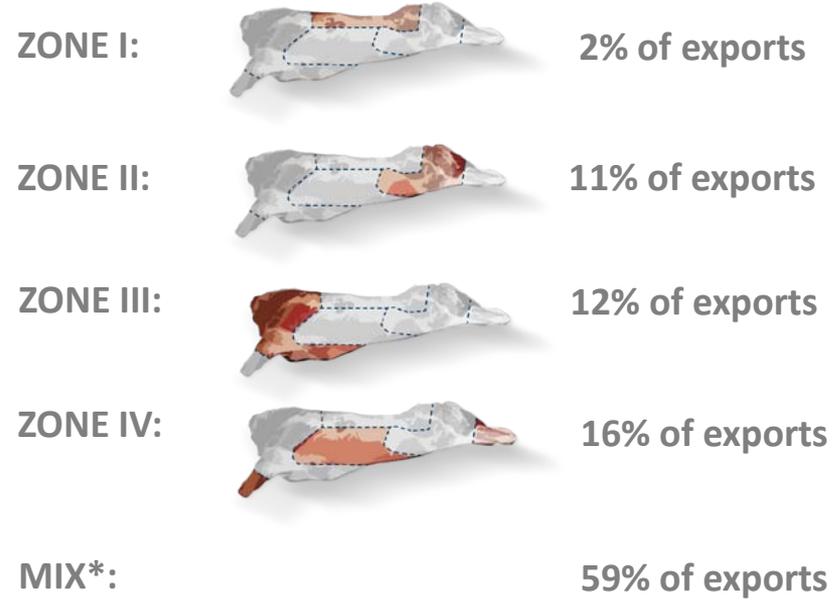
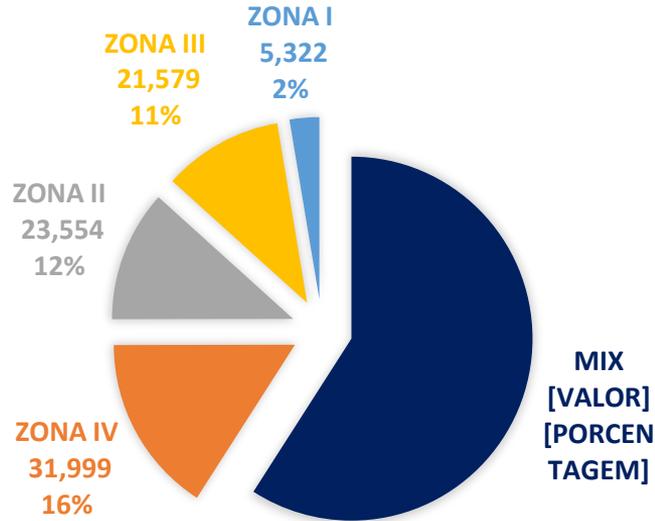
Weight 43kg
 % weight 25
 % value 25



ADDED VALUE CLASSIFICATION BY ZONES - CHINA



TONS - 2017



* MIX: shipments containing more than one classification zone

Source: MDIC/SECEX/ABIEC



Thank you!

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