INTERNATIONAL POULTRY COUNCIL

2022 ANNUAL MEETING

28-30 SEPTEMBER 2022
BORDEAUX, FRANCE

#ipc22 #proudpoultry

HOST

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Fédération des Industries Avicoles

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ROBIN HOREL
IPC PRESIDENT

Dear friends,

I am thrilled to welcome you all in the beautiful city of Bordeaux for the 2022 International Poultry Council meeting.

When we closed the Sao Paulo meeting in August 2019, I do not believe any of us could have foreseen we would have to wait three years to meet again in person. Yet after five postponements, we are finally able to reconnect with our friends and colleagues from the global poultry sector.

We have much to talk about over the next few days. Although life seems almost back to normal, we cannot forget that the Covid-19 pandemic is not over and its impact even less so.

Most countries around the world are suffering extreme inflation and the situation is exacerbated by the war in Ukraine, contributing to supply chain disruptions and skyrocketing energy prices. Many economists are predicting a recession by next year.

Within the poultry sector, we still face a number of threats from avian flu to anti-meat messaging and rising food prices.

We will discuss these challenges but we will also reflect on the poultry sector's achievements, the opportunities ahead and the way forward. We have asked our speakers to bring their expertise and insights to the table to answer three questions:

» What is the role of the poultry sector in achieving global food security?

» How do we anchor poultry in sustainable diets?

» How do we shape a sustainable future for the poultry industry?

Granted, these are not the easiest of questions to solve in two days but that is why we brought together such a stellar line-up of speakers. We might not leave the meeting with turnkey solutions but I am confident we will have a much clearer view on what our next steps can be.

On behalf of the IPC Executive Committee, I want to extend my sincere gratitude to Paul Lopez and his team at the **Fédération des Industries Avicoles** for their dedication and commitment to making this event happen.

Thank you to our diamond sponsor **Ceva Santé Animale** for welcoming us in Bordeaux and their ongoing support and to **Rabobank**, **MSD Animal Health**, **Aviagen** and **USSEC** for standing by IPC as event sponsors.

Last but by no means least, my thanks to the IPC team Nicolò, Dennis, Caroline and Phouth for their enthusiasm and drive.

I wish you an excellent meeting in Bordeaux.

MEETING OVERVIEW

WEDNESDAY 28 SEPTEMBER

1 WORKING GROUP
COMMUNICATIONS
Bassin-à-Flots
08:45 - 10:15

2 WORKING GROUP
FOOD SAFETY & PROCESSING
Bassin-à-Flots
10:30 - 12:00

3 WORKING GROUP
SUSTAINABILITY & ENVIRONMENT
Bassin-à-Flots
13:00 - 14:30

4 WORKING GROUP
ANIMAL HEALTH & WELFARE
Bassin-à-Flots
14:45 - 16:15

5 WORKING GROUP
TRADE
Bassin-à-Flots
16:30 - 18:00

6 **WELCOME RECEPTION**
Wallace Rooftop
19:00 - 21:00

THURSDAY 29 SEPTEMBER

7 **BUSINESS MEETING**
Embarcadère
10:00 - 13:00

8 **GENERAL SESSION**
Embarcadère
14:00 - 18:00

9 **GALA DINNER**
Château Gassiès
19:00 - 23:00

FRIDAY 30 SEPTEMBER

10 **GENERAL SESSION**
Embarcadère
09:00 - 13:00

11 **VINEYARD VISIT**
Château d'Agassac
14:00 - 17:00

VENUES

CONFERENCE VENUE
RADISSON BLU BORDEAUX

63 rue Lucien Faure
Dock G6
33300 Bordeaux
+33 5 56 01 25 00

GALA DINNER
CHATEAU GASSIES

26 route de Brun
33360 Latresne
+33 5 56 68 28 78

VINEYARD VISIT
CHATEAU D'AGASSAC

15 Rue du Château d'Agassac
33290 Ludon-Médoc
+33 5 57 88 15 47

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MSD Animal Health

BUSINESS SESSION & WORKING GROUP SPEAKERS

IPC MATTERS
Nicolò Cinotti International Poultry Council

EUROPEAN LIVESTOCK ALLIANCE
Andrea Bertaglio Carni Sostenibili

IPC GLOBAL DATA PLATFORM
Andrea Verissimo Avela Public Affairs

GLOBAL MACROECONOMIC INDICATORS
Spencer Parkinson Decision Innovation Solutions
David Miller Decision Innovation Solutions

TRANSFORM
Jason Shelton Cargill
Angus Cameron AusVet
Dennis Erpelding International Poultry Council

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INTERNATIONAL POULTRY COUNCIL
Global Macroeconomic Indicators for the Poultry Meat Industry
September 2022

prepared for

prepared by

Decision Innovation Solutions

GENERAL SESSION

THURSDAY 29 SEPTEMBER

14:00 - 14:30 **WELCOME & OPENING**

Robin Horel International Poultry Council

14:30 - 16:00 **GLOBAL FOOD SECURITY**

Gert Jan Oplaat NEPLUVI (moderator)
H.E. Carlos Cherniak Permanent Representation of Argentina to the United Nations Agencies for Food and Agriculture / FAO Committee on Agriculture
Joe Glauber International Food Policy Research Institute
Robin Horel International Poultry Council

16:00 - 16:30 *coffee break*

16:30 - 18:00 **SUSTAINABLE DIETS**

Birthe Steenberg AVEC (moderator)
Namukolo Covic International Livestock Research Institute
Suresh Chitturi Srivanasa Farms
John Giles Promar International

FRIDAY 30 SEPTEMBER

09:00 - 09:30 **CASE STUDY**

Louis Perrault Sasso
Pierre-Marie Borne Ceva

09:30 - 11:00 **CROSSED PERSPECTIVES**

Julia Glotz (moderator)
Mauricio Bauer JBS
John Kirkpatrick Tesco
Janet Helms McDonald's
Pedro Amaral Mars Global Petcare

11:00 - 11:30 *coffee break*

11:30 - 12:00 **FRENCH POULTRY SECTOR OVERVIEW**

Paul Lopez Fédération des Industries Avicoles

12:00 - 12:45 **TRADE PERSPECTIVES**

Nan-Dirk Mulder Rabobank

12:45 - 12:55 **NEXT MEETING**

Prasert Anuchiracheeva Thai Broiler Processing Exporters' Association

12:55 - 13:00 **RECAP & CLOSE**

Robin Horel International Poultry Council

GENERAL SESSION PANELS
THURSDAY 29 SEPTEMBER

GLOBAL FOOD SECURITY

GLOBAL FOOD SECURITY CHALLENGES

H.E. Carlos Cherniak Permanent Representation of Argentina to the United Nations Agencies for Food and Agriculture / FAO Committee on Agriculture

GLOBAL FOOD SECURITY OPPORTUNITIES

Joe Glauber International Food Policy Research Institute

THE ROLE OF POULTRY IN A FOOD-SECURE WORLD

Gert Jan Oplaat NEPLUVI (moderator)
H.E. Carlos Cherniak Permanent Representation of Argentina to the United Nations Agencies for Food and Agriculture / FAO Committee on Agriculture
Joe Glauber International Food Policy Research Institute
Robin Horel International Poultry Council

The events of the last three are bound to have a long-term impact on the poultry industry and the world at large. This session's speakers will explore how we can mitigate the impact of rising food prices, supply chain disruption and the long-term repercussions of the Covid-19 pandemic on global food security aspirations. They will look at key factors required to help the poultry sector weather the impact of the last three years, how to shape policies to support the poultry sector's efforts to feed the world and how trade can foster growth and development in the poultry sector in emerging markets. Finally, they will consider how IPC can support the sector to help improve the perception of poultry meat and its role in global food security.

SUSTAINABLE DIETS

SUSTAINABLE LIVESTOCK PRODUCTION

Namukolo Covic International Livestock Research Institute

REVERSING THE NARRATIVE - THE EGG STORY

Suresh Chitturi Srivanasa Farms

CONSUMER PERCEPTIONS

John Giles Promar International

ANCHORING POULTRY IN SUSTAINABLE DIETS

Birthe Steenberg AVEC (moderator)
Namukolo Covic International Livestock Research Institute
Suresh Chitturi Srivanasa Farms
John Giles Promar International

At a time when anti-animal protein messages get louder and louder, how can poultrymeat and eggs fit in a sustainable diet? Our speakers will look at how poultry production fits in sustainable livestock production and how the sector can promote science-based and positive messaging to support sustainable diets. They will also consider how the different animal protein sectors can collaborate to help anchor poultry's role in sustainable diets and look for the missing piece of puzzle in the poultry sector's approach to cementing the role of poultry in sustainable diets.

GENERAL SESSION PANELS
FRIDAY 30 SEPTEMBER

CROSSED PERSPECTIVES

PRODUCTION

Mauricio Bauer JBS

RETAIL

John Kirkpatrick Tesco

FOOD SERVICES

Janet Helms McDonald's

CUSTOMER

Pedro Amaral Mars Global Petcare

LEVERAGING INNOVATION & LESSONS LEARNED TO SHAPE A SUSTAINABLE FUTURE FOR THE POULTRY VALUE CHAIN

Julia Glotz independent (moderator)
Mauricio Bauer JBS
John Kirkpatrick Tesco
Janet Helms McDonald's
Pedro Amaral Mars Global Petcare

What is the poultry industry's new normal? How do you identify synergies and shared opportunities throughout the poultry value chain? This session's speakers come from all steps of the poultry value chain from production to retail, food service and end-customers. They will look at how the poultry sector can channel other sectors' innovative ideas that might not be replicable directly and how the different actors of the value chain can work together more effectively to make the value chain more sustainable. They will also try to paint a picture of what the agriculture, food and beverage industry of 2050 will look like with global trade organizations at the heart of sustainability efforts.

SPEAKERS

ROBIN HOREL

Robin Horel has spent his whole career in the poultry industry. Currently Robin is the voting delegate representing Canada at the International Poultry Council (IPC) and has the privilege of being the President of IPC. Robin was the President & CEO of Canadian Poultry & Egg Processors Council (CPEPC) from 2003 to 2019. Prior to that date Robin worked for Maple Leaf Foods and its predecessor, Canada Packers Poultry, for 27 years. Robin's career with Maple Leaf was spent entirely in the poultry industry, and included various management roles in sales, operations, procurement and industry relations.

H.E. CARLOS CHERNIAK

Ambassador Carlos B. Cherniak is the Permanent Representative of Argentina to FAO, IFAD and WFP, since December 2019. He is also the Chairperson of the COAG Sub-Committee on Livestock. Previously, he was the Chair of the G77&China Rome-Chapter. He is a lawyer, professor of international relations theory and a career diplomat, with experience in human rights, international negotiation and cooperation. He was posted as Deputy Chief of Mission and head of the Political Office at Argentine Embassy to Italy, where he played an important role in promoting human rights and bilateral cooperation.

JOE GLAUBER

Joe Glauber is a Senior Research Fellow at the International Food Policy Research Institute and serves as interim Secretary of the Agricultural Market Information System (AMIS). He is also a visiting scholar at the American Enterprise Institute and a non-resident Senior Adviser at the Center for Strategic and International Studies. Joe spent over 30 years at the U.S. Department of Agriculture including as Chief Economist from 2008 to 2014. Joe was the Special Doha Agricultural Envoy at the office of the U.S. Trade Representative where he served as chief agricultural negotiator in the Doha talks.

GERT-JAN OPLAAT

Gert-Jan Oplaat is the President of NEPLUVI, the Dutch poultry federation. He was elected President of the European poultry body AVEC in September 2022. Born and raised on a family poultry farm, Gert-Jan worked extensively with GPS and GGPS birds. In 1998, he was elected to the Dutch House of Representatives (VVD) and represented his constituency until 2006. While in office, he was his party's spokesman for all agriculture issues. Gert-Jan has held several positions in the Netherlands including with the Dutch Chamber of Commerce and the Dutch poultry farmers Association (NPV).

BIRTHE STEENBERG

Birthe Steenberg has been Secretary General of AVEC since 2017. Previously, she worked as chief consultant in Agriculture & Food and managed the Danish Poultry Meat Federation from 2012 to 2017. She has a degree in Veterinary Medicine from the University of Copenhagen. She is a member of the IPC Executive Committee and several committees under the auspices of the EU Commission including the European food security crisis preparedness and response mechanism, the Advisory Group, on Food Chain and Animal and Plant Health, and the Civil Dialog Group on Animal Products - Poultrymeat and Eggs.

NAMUKOLO COVIC

Namukolo Covic is the Director General's Representative to Ethiopia for the International Livestock Research Institute. From 2015 to 2021 she served as Senior Research Coordinator at IFPRI, for the CGIAR Program on Agriculture for Nutrition and Health and worked on projects in several countries including Kenya, South Africa and Zambia. She has worked extensively with the government of Ethiopia. She leads the Governance Working Group of an Independent Expert Group that emerged from the UNFSS that has developed a Monitoring Framework on Food Systems Transformation to guide progress on the SDG countdown to 2030.

SPEAKERS

SURESH CHITTURI

Suresh Chitturi leads Srinivasa Farms, a dominant force in the Indian Poultry Industry. After assuming leadership, Suresh steered Srinivasa to achieve sustainably high growth through expansion and diversification. Adopting a farmer first philosophy, he is helping the industry to be more sustainable and responsible in its production and sourcing. In 2018, Suresh was elected Chairman of the International Egg Commission, the first Asian person in this role. Suresh is also active in wildlife conservation through his work with WWF and other conservation minded organizations.

JOHN GILES

John Giles is a Divisional Director of Promar International – the agri food value chain consulting subsidiary of Genus plc. He is the recent past President of the UK Chartered Institute of Marketing's Food, Drink and Agriculture Group and a past Chair of the UK Institute of Agricultural Management. He is also a Visiting Lecturer at the University of Reading. John has worked with Promar extensively throughout the UK and in some 60 other countries on agri food marketing research and related assignments. He has carried out projects across a wide range of product areas including the dairy, beef, pork, poultry and horticultural sectors.

PIERRE-MARIE BORNE

Dr Pierre-Marie Borne is Public Affairs Director for Africa and the Middle East at Ceva Santé Animale. He joined Ceva in 1992 where he has had several roles including Global Technical Services Director, Biological and Business Unit Director. For the last eight years, he has been in charge of the zoonotic disease strategy. Pierre-Marie is a veterinarian, having graduated from the Lyon Veterinary School. He has experience of working with smallholder farmers in developing nations. Dr Borne was a board member of GALVmed, a charity implementing livestock health projects for smallholder farmers in developing countries.

LOUIS PERRAULT

Louis Perrault is the President of Sasso, a pioneer in traditional poultry breeding. Sasso focuses on preserving, breeding and improving rustic strains. Louis led the family business' activities for almost two decades before being named president in 2018. In 2017, he signed a strategic partnership with Hendrix Genetics to expand Sasso's network. Louis is a champion of colorful, traditional chicken breeds, having helped Sasso develop the largest gene pool of traditional poultry breeds. In recent years, he joined forces with Ceva with support from the Gates Foundation, to develop specific breeds for African poultry farmers.

JULIA GLOTZ

Julia Glotz is a B2B writer, editor, consultant and trainer specialising in food & drink, with more than 15 years' experience working on and with trade publications, especially focusing on senior fmcg audiences. Before going freelance in 2019, she spent nine years on staff at The Grocer, including five as managing editor, where she was in charge of the day-to-day running of the publication, commissioned more than 1,000 articles for its opinion section and led on digital strategy. She also curate The Trim, a weekly newsletter that rounds up interesting and unusual food & drink articles from around the web.

MAURICIO BAUER

Maurício Bauer is Corporate Sustainability Officer at JBS Brazil in charge of carrying out the sustainability strategy in Brazil. He focuses on strategies and solutions for the sustainable production of farm commodities, improvements to processes, innovation and technology. Before joining JBS, he worked for WWF as Senior Director for the Beef and Leather Supply Chain. Mauricio also worked for the US National Wildlife Federation developing strategies involving beef protein, leather, palm oil and soybean. He was also a member of the JBS Australia team and worked for over ten years at other companies in the food industry.

SPEAKERS

JOHN KIRKPATRICK

John Kirkpatrick joined TESCO in May 2015 as Agricultural Manager for Poultry and Eggs (Europe, including the U.K., and South America and Asia) and is responsible for agricultural supply across feed mills, breeders, hatcheries, grow out, catching/transport and slaughter across all avian species and eggs. John has spent his career in Poultry working across many countries and has led a significant change program across the TESCO poultry and egg division, focused on improvement based on science, evidence and factual information to improve the customer offer and promote trust and transparency with farmers and consumers alike.

JANET HELMS

Dr. Janet Helms is Manager, Global Sustainable Sourcing, Animal Health and Welfare at McDonald's. Her responsibilities include chicken, antibiotics, and fish. Prior to joining McDonald's, Janet owned a large animal veterinary practice in Southern California, providing preventative health services to dairy and beef clients. Following her career in veterinary practice, Janet worked in multiple roles at Pfizer/Zoetis including regulatory compliance and technical sales. More recently, Janet was a Global Sustainability Developer at Inter IKEA Group responsible for sourcing animal and plant based foods in North and South America.

PEDRO AMARAL

Pedro Amaral works as Global Senior Sustainability Manager at Mars Petcare. He leads global workstreams related to Mars' commitments for Climate and Land Use Change. He also represents Mars in the Consumer Goods Forum Forest Positive Coalition of Action, where he co-chairs the Beef Work Group. Pedro is a sustainability expert with 15 years of experience. Prior to joining Mars Petcare, he worked on sustainability issues at the non-profit Proforest in the UK and global consultancy ICF International. He holds an M.Sc. in Environmental Planning and an Engineering Degree in Agronomic Engineering.

PAUL LOPEZ

Paul Lopez has led BtoB operations at LDC Group, a leading French poultry company since 2015. Prior to joining LDC, Paul managed several poultry companies in France for over twenty years. Recogized as a poultry leader in France and Europe, Paul has been involved in several associations including the Fédération des Industries Avicoles (FIA), the French poultry processing companies' trade association. He was elected president of FIA in 2016. At European level, Paul joined the board of the European poultry body AVEC in 2009 before being elected president in 2014 until he stepped down in 2022.

NAN-DIRK MULDER

Nan-Dirk Mulder is a senior global specialist animal protein covering the industry from a value chain perspective from farming, processing to inputs like animal nutrition, animal health, genetics and equipment. He is based in Rabobank's headquarter in the Netherlands and works already more then 20 years for Rabobank. Before his appointment at RaboResearch Food & Agribusiness, Nan-Dirk worked for the Product Boards for Livestock, Meat and Eggs (PVE), Wageningen Economic Research and was member of Dutch Commissions at Management and Expert Committees for Livestock, Meat and Poultry at the European Commission.

SOCIAL PROGRAM

WEDNESDAY 28 SEPTEMBER

Welcome Reception Radisson Blu

THURSDAY 29 SEPTEMBER

Gala Dinner Château Gassiès

Buses will depart from the Radisson Blu at 18:45 sharp.
Please make your way to the Radisson Blu lobby in time.

FRIDAY 30 SEPTEMBER

Vineyard visit Château d'Agassac

Buses will depart from the Radisson Blu at 13:45 sharp.
Please make your way to the Radisson Blu lobby in time.

SPOUSES PROGRAM

WEDNESDAY 28 SEPTEMBER

19:00 - 21:00 **Welcome Reception**, Radisson Blu

THURSDAY 29 SEPTEMBER

10:30 - 12:30 **Walking tour**, Les Visites d'Hubert
meeting point: Tram B stop Grand Théâtre
Participants should be ready to leave the Radisson Blu at 10am. From the Radisson Blu, walk to the Cité du Vin stop. Take **tram B** towards France Alouette Pessac and hop off at the **Grand Théâtre** stop.

12:45 - 14:00 **Lunch**, IBAÏA Café
Take **tram B** towards Bordeaux Berges de la Garonne and hop off at the **CAPC Musée d'Art Contemporain** stop.

14:30 - 15:30 **River cruise**, Bordeaux River Cruise
Bordeaux River Cruis pier, quai des Chartons, next door to the IBAÏA Café. Please use your CityPass to access the boat.

19:00 - 22:30 **Gala Dinner**, Château Gassiès
Buses will depart from the Radisson Blu at **18:45** sharp.

FRIDAY 30 SEPTEMBER

morning **Musée d'Aquitaine,** 20 cours Pasteur, 33000 Bordeaux
Please allow 30 minutes for travel to and from the museum. If you plan on joining the afternoon vineyard visit, please make sure you are back at the Radisson Blu for 13:30 at the latest.
From the Radisson Blu, walk to the Cité du Vin stop. Take **tram B** towards France Alouette Pessac and hop off at the **Musée d'Aquitaine** stop. Please use your CityPass to access the museum.

morning **Cité du Vin**, 134 Quai de Bacalan, 33300 Bordeaux
Please allow 10 minutes for travel to and from the museum. If you plan on joining the afternoon vineyard visit, please make sure you are back at the Radisson Blu for 13:30 at the latest.
From the Radisson Blu, walk down the Rue Lucien Faure towards the Garonne river and turn left on the Quai de Bacalan. Please use your CityPass to access the museum.

14:00 - 17:00 **Vineyard visit**, Château d'Agassac
Buses will depart from the Radisson Blu at **13:45** sharp.

INTERNATIONAL POULTRY COUNCIL

1532 Cooledge Road
Tucker, Georgia, 30084, USA
www.internationalpoultrycouncil.org
info@internationalpoultrycouncil.org