



Nuffield Farming Scholarships Trust

A Newcastle University MacCooper Trust Award

**With curry the new food of Great Britain, can the
Sunday roast be the new food of Asia?**

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1. Acknowledgments

The last 18 months have been an experience I will never forget and will cherish for the knowledge and experience I have gained, the places I have been to, as well as the people I have met. I must thank Nuffield Farming Scholarships Trust for awarding me this wonderful opportunity and make a special mention of Newcastle University, of which I am a past graduate, and the MacCooper Trust for kindly sponsoring my award and supporting me on my travels.

In particular I would like to pay special thanks to John Stones for challenging my thoughts and analysis as well as for his support and guidance in a period that has brought a lot of change to my life.

I would like to thank all the people listed at the back of this report, without whose kind hospitality and vast knowledge this report and its findings would not have been possible.

Finally I would like to thank my fellow 2010 Nuffield scholars as it is the relationships that have been made that have enhanced the whole Nuffield experience and will ensure that I look back with fond memories when reliving stories with my contemporaries at future Nuffield conferences in years to come.

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1. Executive Summary and Recommendations

The following report acts as an account of the writer's experiences while undertaking his Nuffield Scholarship. The aim of the report is to look at the possibilities for the British meat industry in Asia, specifically focusing on China. The writer travels to Australia, China, Hong Kong and the United States looking at all aspects of the supply chain to see what regional differences there are in the meat industry and to explore what potential possibilities there are and whether these lie at the premium or commodity end. He also looks at Australia as a country that is already making great inroads into the Asian market and sees what is being done differently to the UK. The report focuses on what changes the British meat industry needs to make to maximise the potential from the South East Asian market. Below are some snippets from the report followed by the writer's recommendations:

- When the income of the average Chinese person increases to upward of 7,000 USD are we expecting people to drop their native cuisine and start eating rib eye steaks? It is naive and profoundly arrogant to think that our cuisine is better than other nations and that, with wealth, they will just switch to the Sunday roast?
- If you look at a Chinese recipe book, it is very clear that the cuisine is far more complicated than that of the UK. Kitchens in Asia are dominated by the stir fry and soups. Eating together is central to the culture and culinary heritage. Eating out in a restaurant it is clear when sat round a circular table with 17 dishes on offer that this is a social experience of foods that are hot, fragrant, spicy, aromatic and zingy ... very different to the English hotpot or classic meat and two veg.
- The use of meat is very different in China; what are prime cuts to us are deemed to be lean and inferior cuts of the carcass. The Chinese focus on 5th quarter products, meats that have high levels of fat. Bone has great value and is the basis of many of their soups and stocks.
- Chinese people like to project a classy image – brands (international) mean everything to them.
- Status is important to Chinese people – people want to be seen to be doing well and progressing.
- China is rapidly evolving into the supermarket society. Major players – Tesco, Metro, Walmart & Carrefour are all present.



- It is important to understand the shopping experience in China and not just assume that because we like it they will.
- China has had the misfortune to experience food scares, in particular the outbreak of melamine in their milk. That has added to the appreciation of international brands, and trust in overseas products is purely down to the lack of trust in some of their own nationally produced products.

Writer's recommendations:

1. The UK to clearly define its message to export countries. Clarify what makes UK meat better tasting, better value and create a system and process that ensures meat cannot leave these shores under the British label unless it passes these tests.
2. Producers to focus on the wants and needs of the consumer and not carcass yield. What consumers want is the best tasting most succulent meat that is British produced and from British breeds. Once this is in place consumers will be willing to pay a premium for this as they do with every other consumer product. Until we sort this in our domestic market what hope do we have in the international market?
3. To unlock the potential of the Asian market and all export markets the UK needs to market itself with one voice. Efforts and funding should be focused on bodies such as the AHDB in in order to have more people on the ground in these regions, and to orchestrate the UK's interests rather than individual companies exploring their own routes.
4. If we want to sell premium products in Asia we need to educate, familiarise and then have a defined offering with strong values and be able to substantiate why it will be twice as expensive as the local offering.
5. Create a UK brand of meat products that are certified British and where a clearly defined set of tests need to be passed before the product can be included in the brand. This quality control and brand image process should cover all aspects of the supply chain right through to how the cut should be cooked.



2. Introduction



Five years ago I left the big smoke of London and a city job to set up Medium Rare, a meat marketing and distribution company selling free range meats to quality independent butchers. Although not from a farming background I was brought up in the countryside and, having read Agribusiness and Economics at Newcastle the opportunity - having gained four years' experience in a city bank - to go into partnership with a great friend and set up our own meat company was, at the age of 26, too exciting to pass up.

With a passion for provenance, welfare and quality my desire was to work with the best producers, take quality meats and, through a successful supply chain, make them available to as many suitable like-minded outlets as possible. Medium Rare is based upon key values of knowing where your food comes from and who it has been produced by, combined with good service, and successfully supplies over 100 butchers weekly with their free range meat requirements. It was through Medium Rare I was exposed to Nuffield and my thanks must go to past Scholar Roger Mercer for this. When I heard about the possibility of becoming a Nuffield Scholar and the chance to explore a chosen



topic and, through a unique network and travel, experience first hand the practices of my peers across the globe, I leapt at the chance.

Nuffield has been one of my most enjoyable experiences to date, throughout which I have been fortunate to travel to the US, Australia, Hong Kong and China. The aim of this report is threefold:

- Firstly to act as a record of my Nuffield experience
- Secondly to investigate my chosen topic
- Thirdly to act as an example of how an experience such as Nuffield can make huge changes to your life.

So what is my topic and what is it that I want to achieve? The subject title I wish to study is:

“With curry the new food of Great Britain, can the Sunday roast be the new food of Asia?”

Asia is the fastest growing market in the world; it has the fastest growing population and personal wealth is growing rapidly. If you mentioned the words “status symbol” in Great Britain you would think of a speedboat or sports car. In many parts of Asia and especially China the latest status symbol is meat! I would like to study these changes and look at what opportunities there are in Asia for the British meat industry. With our temperate climate, welfare and heritage of stockmanship is there a market for the Sunday Roast in Asia?

Asia is a vast continent with many different cultures, so for the purpose of this study I will focus mainly on China. As you will read in the next chapter China is one of the fastest growing economies in the world and it holds vast opportunities. Although its cuisine and diet is very different to that of Western Europe’s surely there must be some opportunities there?

My reasons for choosing this topic are largely based on my desire to explore export opportunities for Medium Rare. While I worked in the banking industry I was exposed first hand to the significant changes taking place in the emerging BRICS markets. Having consciously moved into the meat industry five years ago I have always wondered, in the back of my mind, what the effects will be of such rapid growth in these regions and how the meat industry as a business could capitalise on this.

I have a brother-in-law who works in the beef industry in Australia and has been involved first hand in implementing successfully the Wagyu production method in Western Australia. While I enjoy the concept of what he has done, I would like to look



more closely at meeting the demands of Asian meat requirements. Furthermore, I would like to investigate if it is possible to create a market based upon the British values of farming livestock and the preparation of meat.

I firmly believe that the impact of this topic on the British meat industry could be huge. Currently our industry is being squeezed, both in numbers of livestock on the ground, and in profit margin, due to the fact that we are producing on a commodity basis and are increasingly having to compete on price with producing countries such as Namibia, Brazil and Poland when they have a significantly lower cost structure and poor welfare systems. I know first hand, having set up Medium Rare successfully, that marketed correctly British meat can be sold at a premium. I would like to investigate my belief that as Asians become wealthier they will want to experiment with different food cultures, in much the same way as we have done in the UK. This offers a huge opportunity for the industry and one we should grasp with both hands.

Well, here we go, please read on and I hope you will learn, enjoy and get a small idea of the experience that I have enjoyed so greatly!

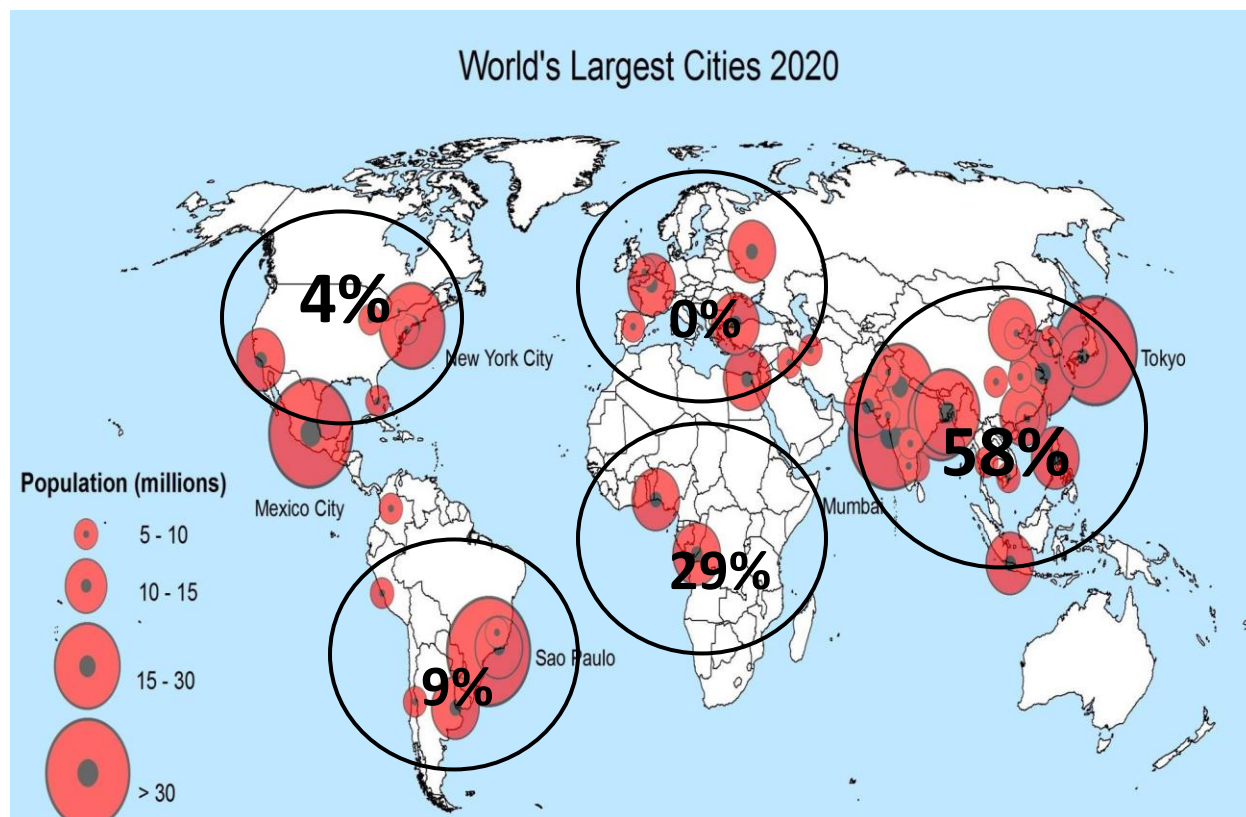


3. China – The Market and Opportunity

Today China is one of the world's economic giants, the 3rd largest in 2010 in terms of GDP and widely expected to eclipse Japan and the US as the world's largest economy before long. For nearly three decades annual growth has rarely gone below 9% and should remain strong despite the global economic slowdown and rising domestic inflation, partly driven by the current surge in food prices.

Read the paragraph above and you immediately think that China is a nation of wealth, but low incomes characterise life for most Chinese. Chinese GDP per person ranks 86th in the world, in line with Tunisia, Angola and Albania. The head of China's statistics bureau recently said, *"There should be a sober understanding that China remains a developing nation."*

In numbers China blows your mind away. Its population is 1.3 billion, which represents 20% of the world's population. While I was there one statistic that put this into perspective was that there are 36 cities in Europe with a population over 2 million people, in China alone there are over 100.



Data source from the IMF website



Food security for 1.3 billion people is the number one policy of the Communist party of China. China has 7% of the world's arable land yet has to feed over 20% of the world's population. Undoubtedly that limited capacity to expand arable land will need to be offset by more mechanisation, better farming techniques and the introduction of higher yielding bio-tech crops. Having said that this does not take into account one of China's other major constraints: that of water.

As the nation develops the emergence of the middle class runs in parallel. Current estimates are that some 130 million people in China earn more than 7000 USD p.a. The middle class consumes more diverse protein sources like red meat and dairy products and, as explained in the Introduction, it is without doubt that these are being seen as much as a status symbol as a new choice. China's meat consumption since 1995 has increased by 112% to 53 kilograms per person, coming from a level of 25 kgs in 1995. This sounds a lot but bear in mind that this is still 45% less than the average consumption in the US.

Pork accounts for 65% of total meat consumption, poultry 20% and red meat (beef & sheep meat) combined at 14%.

While the numbers and statistics above make the export picture rosy there are barriers to contend with. Depending on the trade agreements in place China charges tariffs for certain goods. For example if Australia wants to export offal into China there is a 12% tariff. Australia has to compete with countries from around the world. Chile and New Zealand for example have trade agreements set up for offal which results in them being charged a lower tariff than Australia.

While I was in China, through the kind help of Peter Bloxham, I was invited to the British Embassy in Beijing for an evening presentation from the UKTI.

Without doubt one of the current British government's major objectives is to increase trade with China and of course, for long term prosperity, set up trade agreements with that country.

To say that the Chinese market represents a huge opportunity for British companies has traditionally been like saying that there would be no water shortage if only we could get the salt out of seawater cheaply - it's been true in theory, but hugely tricky to do in practice.

The crude statistics of our trade in goods and services with China tell you most of what you need to know: in 2009 we sold £8.7bn of tangibles and intangibles to China, and we bought three times as much, £25.8bn, from the Chinese.



It's true that UK exports of goods to China rose 44% in the first eight months of 2010 to £4.5bn, but our current account deficit with China is by far the largest deficit we have with any trading partner.

And although over 10 years our sales of goods and services to China have increased by a seemingly healthy 4.6 times, imports have risen by a far greater multiple, 6.6 times.

Briefly, before my trip to China the UK offered an impressive show of enthusiasm by sending our PM, David Cameron, and half the cabinet on what was seemingly a mission to boost UK trade. Certainly from the conversations that I had with the members of the British Chamber of Commerce in Beijing the mood was very upbeat and the feeling was that business could be done. However when I spoke specifically to the embassy representative on trade, the conversation was very much based upon the theme of: don't expect anything in a hurry as these things do take time. The good news is that the UK has signed agreements with China on the import of specific pork offal, but this is not an open trade agreement as it is only for specific companies in the market who are very much the major players - the Vions of this world.

But it's reasonable to be optimistic that UK exports to China will increase because, as the Chinese government concedes, China's economy needs to be reconstructed pretty fundamentally if the official target of growing at around 8% per annum is to be achieved in a sustainable way.

Putting it in the crudest possible terms, the Chinese population of more than 1.3 billion people has to consume more relative to the size of their economy.

Even the Chinese authorities concede that China's current economic model - of growth generated by huge domestic investment and massive net exports helped by an exchange rate that is forcibly held down below where it ought to be - cannot be sustained forever.

Walking around the streets of China you see first hand the huge disparity in wealth and *that* is just in the cities, without going out to the rural areas where the real poverty can be seen. At the high end of the income scale, they want Beamers and 'S'-class Mercs. Between just June and September last year, Mercedes sold 41,000 vehicles in China, one in eight of all its car sales, a rate of growth of 140%.

But for most Chinese, it's about much more basic needs. That is already being reflected by around a third of Chinese GDP growth coming from spending by the household sector in 2010 and 2011, which is up from 28% three years ago. So the magnitude of the money potentially available to Western exporters is colossal. Even now just the



growth in China's imports every year is equivalent to the entire output of the Greek economy, or around £250bn.

That's a lot of meats, whisky, and aero-engines and chocolates that could be made in Britain and sold in China. The question with regards to meat is: how?



5. Highlights of my trip (extracts from my blog)

The aim of this chapter is to act as a record of my Nuffield travel. While it is impossible to outline and cover every experience that I had on my Nuffield experience I felt that the pages below were not only the highlights of the trip but also were the key meetings/discussions that were to shape my thinking and eventually become the backbone of my recommendations.

The first two weeks of our Nuffield experience were spent on the Contemporary Scholars' Conference in the United States. Being thrown into a new group of people is never easy but it is this experience, that you repeat on your subsequent trips, that is in my opinion one of the biggest strengths of Nuffield. Within two weeks you have spent such an intensive amount of time, work and beer together that you count these people as genuine friends. The trip was spent looking at key topics such as how are we going to feed an ever growing population - something I come back to in a few pages' time - as well as touring an array of businesses. The State of Pennsylvania was a great host and the whole scenario was both challenging, thought provoking and of course one heck of an experience.

You leave this formalised part of your study with a mind boggling with ideas and of course a certain sense of competition that you want to achieve more on your trip than the Scholar sat next to you.

With Christmas being the busy time of the year for a meat wholesaler I decided the best period for me to travel was January. My whole trip was just under 7 weeks in total and started with a hellish journey on the 24th December 2010 battling the arctic conditions of the UK and bypassing the hordes of refugees camped outside Heathrow airport to fly to the far sunnier climes of Australia.

The aim of this section of the trip was quite simple; if we (the UK) were to unlock the key to the potential Asian market it would be a good idea to go and visit a country that is far further ahead in doing this than we are. The three weeks spent there were enjoyable for so many reasons, including how often is it that a Pommie can travel to Australia and give them a hiding in the Ashes? ...well it has never happened in my lifetime till now. Secondly, was the experience of staying with fellow Scholars and other kind hosts. I was very aware that when I travelled on to Asia there would be very few Scholars living in the region so the major chunk of my accommodation was going to be hotels. It is undoubtedly by going through the small green book of Nuffield contacts that you learn the most. With my hire car in hand I was able to travel from Sydney and cover much of Victoria, taking in great views, superb hospitality and a few parking/speeding tickets along the way!



From Australia I headed to Hong Kong. With so many trade barriers restricting direct trade with China, Hong Kong is very much a route into China that can bypass some of these regulations and unlock the market place. My aim here was to understand the supply chain and meet with food service companies such as Glory Foods - as described in a few pages' time - and see what potential avenues for trade there are. I spent in total about 10 days in HK, either on the way in to China or a few days on the way out.

The initial experience was of sheer excitement to be in a new and different culture and be able to see firsthand the wet markets that I had heard so much about, I will go into these in further details later in the report. Hong Kong is what can only be described as a trade hub. You see the harbour and it is just endless vessels importing and of course exporting goods all the way around the world. It is only when you sit and speak to these companies that you get an idea of the scale they are dealing with both in distances as well as in volume. Hong Kong was the ideal base for my trip as not only, with its British roots, did it gently ease you into the Asian culture, it also provided plenty of contacts for when I was to arrive in mainland China.

When I arrived in China, I was fortunate enough to be initially hosted by a colleague of my father in law. Travelling in China on your own is not an altogether easy experience especially in January when the temperatures are -11 Celsius during the day and, to be greeted by a private car and given a hotel suite, was a welcome respite. It is not over exaggerating to say that China blows your mind. It is a vast country with an alien culture and different mindset to what we are used to in Europe. My aims in China were to speak to government officials, namely through the UKTI, and to understand how the market place works on the ground. I spent a number of enjoyable days being hosted by Peter Bloxham, a past lecturer at Harper Adams, who now works closely with Beijing University and has set up his own import business bringing in British Ales to supermarkets and bars across the city.

While in Beijing I was delighted that my wife Emi and daughter Annabel could join me for a week so we could enjoy some of my Nuffield experience together, taking in the Forbidden City and the Great Wall and, of course, for them to acquire a taster of what Nuffield is all about.

In the following pages you will read about some of the highlights of my trip in more detail, taken as extracts from my blog, and you will be able to understand my thought processes as my trip evolved.



5.1 Tour of Prime Quality Meats – Sydney, Australia

As I am writing this the Ashes have been firmly wrapped up and by now the boys are probably enjoying a few ales at Barmy HQ ... so without any further delay it is probably time to get on and do some work. So here we go, to kick things off a day spent with the finest butcher's chain in NSW - Craig Cooks Prime Quality Meats.

"Meat should be an unreserved pleasure." This has been Craig Cook's maxim since 1980. When you raise contented animals without hormone growth stimulants or antibiotics, they absorb more nutrients and minerals. Lovingly produced meat is the carnivore's super food.

The Prime Quality Meat story begins with the passion of Craig Cook. His determination is simple - to provide nothing less than the most naturally farm raised, hormone promotant-free meats of the highest quality possible. This intent has led him to become Australian Meat Industry Council National Secretary and Meat & Livestock Ambassador for Red Meat retailing in Australia.



A different attitude to meat than in the UK!

But that is only a small part of a very large undertaking. From a lush green paddock to your dining table, Craig ensures that the meat that bears his name is superb. *"It's all about that glow you get when the meat dish you serve is truly spectacular. It might just be a T-bone, but it's a T-bone with the wow factor."*

The above quote is cut straight from Prime Quality Meat's website, and when I first read this I was immediately impressed with the enormous passion that it exudes and also how he shares the same passion that we have at my own business Medium Rare.

Prime Quality meats are the smartest butcher's chain across NSW. With 15 stores across Sydney and the suburbs, they are pitching at the top end of the market with concessions also in the largest David Jones (Oz's John Lewis equivalent) food halls.

My first impressions of the counters were of very smart presentation and a business that is eager to get its message across. Initial differences with the UK were the signs as



pictured above. My fear with the UK is that, with their Meat Free Mondays, butchers may have to sell veg just to make a living.

Undoubtedly Australians are great meat lovers and passionate about their butchers. It is fair to say that, of the meats, OZ tends to favour beef. The big debate seems to be whether you eat grain fed, where the options are 100 day/250 day etc, or grass fed beef. This is quite a bone of contention, with the MSA (Meat Standards Australia) supporting only grain fed, as with their Meat Standards system, through H-bone hanging, PH testing and various other processes, eating quality is guaranteed

Craig on the other hand was adamant that the grass fed beef from his farms had far superior eating quality and he would not serve grain fed on his counter - a subject I am sure I will revisit on this trip as there are many arguments both for and against, plus environmental. The understanding I have is that although you would think that the grass fed would have a far lower carbon footprint the counter argument is that a grain fed animal takes a lot less time to grow to finishing and thus spends a lot less time excreting methane. I am seeing a lecturer from Melbourne University on Monday so will see what he has to say on this....



Australian grain fed Wagyu beef.

Wagyu beef is fast becoming big business in Oz and, although in my humble opinion it does not look any great shakes on the counter, it certainly blows your mind away both in price and flavour. This is produced in Australia, as embryos were sent over

from the Kobi region a while ago and there are now plenty of Wagyu across the country. Could this be a successful product in the UK? That I am not sure about at the moment, I have a feeling it would be met with resistance from UK butchers due to its price and appearance and possibly the healthy eating British might have reservations about the fat content. Having said that it has to be viewed as a completely different product to beef and there are no arguments with tenderness and taste. Could that be my first possible new market for British Meat?

Undoubtedly Craig is at the forefront of the Australian Meat Industry and, through his chain of shops, is pushing forward with the idea of branded meat to the Australian consumers. One query was his chain's free range pork. When I rang the farm at Ottawandi Pork I was informed that they only produce "barn range pork" please, not another term to confuse consumers!!



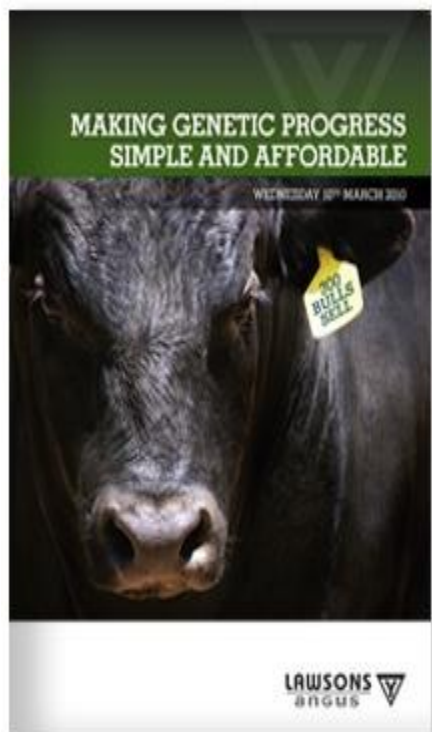
My thanks has to go to Craig and his managers for making me so welcome and showing me how they do business. I left with a slightly empty feeling - why can't British butchers be as well supported as Australian butchers? When I asked him how he felt about his Northbridge shop being next to a major supermarket, his response was a firm riposte that the latter could not compete with the quality. This is exactly the attitude UK butchers must take and continue to seek out the best producers (hopefully Medium Rare) to keep one step ahead of the multiples.

One new idea I will be going home with is the concept of stock as a new product. In all their shops pouches of stock (chicken/beef & lamb) were available and were very good sellers. I have never seen this in a UK butcher's so watch this space....

For those interested here is their website - impressive so worth a look!
<http://www.primequalitymeat.com.au/>

5.II Lawson Angus – Yarra Valley, Australia

Next stop is an 800km drive to Seymour in Victoria to look at an Aberdeen Angus bull breeding company. - Lawson's Angus - am I brave enough to stand in a field of bulls??



Well after an 800km drive, a speeding ticket and a half hour chat with the police officer involved about his 40 Angus steers I finally arrived in Seymour at the beautiful setting of Harry and Ruth Lawson's house.

Lawson's Angus supports their customers with breeding farms in WA, Queensland and Victoria. Breeding is sold in three ways; through the sale of bulls at their bi-annual auctions, semen used for AI, or through the sale of embryos.

On arrival my knowledge of beef genetics was practically zero. Having said that, I have always been aware through my previous visits to OZ that the UK is light years behind Australia in this area and that Medium Rare could potentially create a competitive advantage through the use of genetics.



After a very warm welcome and seriously good curry they set about educating me on the world of genetics. Lawsons Angus was set up 40 years ago by Harry's father. I had been put in contact with them through my brother in law's recommendation that they are world class at animal breeding. I was blown away by the detail they go into to ensure that their breeding bulls are out-performing the Angus breed average by 10 years.



Harry Lawson with his prime Angus bull calves

Regular data is recorded through the use of ultrasound to collate fat scores, eye muscle size, scrotum size, marbling score and growth over 100, 200 & 600 day periods. Through working in partnership with the US they bring over the best sires and serve their own hand selected dams through AI. This data is then centralised and indexed taking into account the pedigree of the parents and the farming system in which the bulls are being used.

Australia has firmly backed the Angus as its breed of choice and as a result there are very strict rules if you are to sell your Angus beef under the certified Angus label. Having spent a lot of time in the US - the undoubted leaders in this field - Harry is very passionate about research.. Continually Harry asked why is it that, when the US have proved the best eating quality comes from the Angus (and many more of the British breeds – Hereford, Dexter, South Devon etc.), the British continue to be obsessed with Euro continental breeds whose end result in often lean tasteless beef?

What has impressed me is the integrated system for beef production. Whether you agree with feedlots or not it is very apparent that most Australian producers are thinking about beef production with the consumer in mind. Many companies like Lawson Angus are working with purely one objective - to improve eating quality rather than yield, wastage and other prominent factors that British producers focus on. If you combine their genetic work and requirements to be registered as certified, along with the MSA standards for slaughter and hanging, then you can fully understand why the Australians have managed to master consistency.

So the question is, if all this info is available why are we in the UK not doing it? When I make a sweeping statement such as this, I mean on a collective, centrally led basis, I am very aware that there are individual farmers doing great things back in the UK. The problem is that it is far harder for an individual to make a difference. What we need is an industry-led shift in thought. Putting my Medium Rare hat on, the one product that we



have not had success with is beef. We have struggled to have a story that is different to any other producer and have also struggled to find consistent product and producers who can supply this to us. With this discussion Harry suddenly got very excited. Having already exported his bulls to Turkey, Russia and China this year could this be the start of a relationship with Medium Rare?

I am convinced now from meeting Harry and Ruth that for Medium Rare to have a successful beef product we need to produce beef ourselves. We must focus purely on British breeds and convince butchers that taste and flavour are more important than yield. A strong competitive advantage could be gained by bringing in embryos of the best genetics globally and having a small herd ourselves to use for the shop window, using contract farmers with our genetics to grow the numbers.

You may ask what is wrong with the Angus beef on sale in Waitrose. The requirements for Waitrose, which I know as I have visited one of the contact finishers for Dovecot Park, is that the animals only need 51% Angus and can be sourced from anywhere as long as they are on a Waitrose approved farm for 21 days. Compare this with the certified Angus label in Oz where stock need to be pure Angus and meet the requirements of the MSA. Certainly food for thought to head home with!!

5.III Professor Albert McGill – Melbourne, Australia

Having read for a degree, you would think I should have met a few professors in my time. If I am honest to my knowledge I think I have only ever spoken to two! The first was pretty uninspiring but the second, Professor David Hughes, was quite the opposite. So driving out of Melbourne, Victoria, on my way to meet Professor Albert McGill, I was not sure what I was going to ask, whether it would be relevant or more importantly whether it would get an answer....

Professor Albert McGill is a Fellow of the International Academy of Food Science and Technology (IAFoST), operates a consultancy and advisory service, Future for Food, is a Visiting Professor at Fuzhou University, PR China, and has been a Visiting and *is* an Associate Fellow at the James Martin Institute for Science and Civilization at Oxford University.

So how did it go then? Well I can honestly say he is one of the most interesting people I have ever met. You do not meet many people that you can listen to all day, but Albert is certainly one of them. Not only has he lived an interesting life of travel and adventure



but he can challenge you and leave you thinking hard about how you have thought about things before.

As Nuffield Scholars my year group spent a few days in London when we first met each other. We had some great meetings with Defra, NFU, Natural England and the then Shadow Minister for Agriculture in the House of Lords. It is only now almost a year down the line that I am starting to feel able to question what they said to us.

When I asked Albert what he thought about the whole growing global population and what we as food people could do to solve this problem, (big question I know, but I thought I would go in there all guns blazing!!) he looked at me and said : why do people think farming and food is the same thing? We all think that to solve the problem the answer is in growing more food but if you look at food security, which by definition is to make sure in good time and not after natural disasters that there is no hunger, in a global sense we have food surpluses at the moment. If you add to this the fact that at the moment there is a global food wastage rate of 12% then surely there is plenty of food to go around?

As I sit in Hong Kong writing this blog, I see a panic article in the Telegraph from the CEO of Unilever stating the case for the need for increased food production, quite relevant I think :

<http://www.telegraph.co.uk/finance/financetopics/davos/8261856/Unilever-chief-warns-over-global-crisis-in-food-output.html>

Albert at this point was looking frustrated. Why is it that no government or professional body, of which there are plenty, has actually looked at this topic from the angle of the consumer? His view is that half of the problem is getting people to buy what they actually need and not what they think might be useful in the future. Getting supermarkets/retailers to buy all foods that are grown and not just the straight green grade A beans as opposed to the beans that have a slight kink in them, that is the key, he said.

The next issue is to look at what blockers there are that are stopping this surplus from getting to the parts of the world that are hungry; are they economic, political or logistical?

Albert is a man who is a straight talker, and in my view talks a lot sense. e.g. *Everybody is focussed on mass production when the biggest issue at the moment is mass waste. When talking about food shortages they are thinking about farming yet you cannot walk into a field of wheat and pick up a loaf of bread. Food and farming are very different beasts and the challenge is surely getting the raw material from the farm turned into*



food in the most efficient fashion the problem is that this is not happening at all successfully at the moment.

Here is a recent paper written by Albert to whet your appetites further. Albert, many thanks for a thought inspiring lunch. I will definitely be bugging you for further thoughts in the coming months and years!!

<http://www.worldfoodscience.org/cms/?pid=1004536>

5.IV Australian MLA – a Meeting with Aaron Lori

Regional Manager of South East Asia / Greater China

My thanks must firstly go to Jim Geltch the Australian Nuffield director for setting up this meeting with the MLA.

I have been fortunate enough through my brother in law Sean O'Reilly to have been exposed to the workings of the MLA before. On a previous trip looking at Sean's premium Aberdeen Angus herd in the Margaret River, WA, I was taken through the process that farmers have to follow in order to classify their beef as certified Australian Angus under the code Meat Standards Australia. This is a vigorous set of tests with the whole goal being to ensure all meat is consistent and of a high eating quality. What is very clever about this process is that it takes into account the whole process. Just farming an animal in a high welfare, good system is not necessarily going to ensure that the meat tastes good at the end. By offering advice on how the product should be cooked, and what cooking method to use, MLA is bridging the divide between farming and food, a point that was raised earlier by Professor Albert McGill.

The aim of my meeting with Aaron Lori was to get a clear idea of how the MLA attacks the Asian market. Does MLA see the same potential in it? and where are the most opportunities identified?

Aaron is a man on the move, and it is exactly the setup that he runs which speaks volumes about whether Australia sees any potential in the Asian Market. He currently has 25 people on the ground in his patch with 8 specifically in China. He feels very strongly that to do potential business in China you have to have people on the ground in the region who can learn how the locality works and find out where the potential for growth is. Only then can he connect his processors, producers and manufacturers with suitable leads and contacts in the market place.



Australia is very much a red meat based exporter and in 2009 exported 4.3 billion AUD worth of beef around the globe. Over 50% of this was into South East Asia, and it goes without saying that Australia's relative proximity to the market is a huge advantage when capitalising on the potential gains. But this has not always been the case. As little as 8 years ago Australia's major market was to the US, the protein eaters of the planet. The change is quite dramatic. US sales have dropped by 29% whereas sales to China have increased by 82%. The US now only equates to 25% of the export market with Europe taking 2.5%.

So it is clear that the market is big but what exactly is exported to China? Australia, although quite big into live export to the likes of the Middle East and Indonesia is not focused on just selling the whole animal but also a lot of cuts. Add to this their fastest growing sector is in manufactured products such as corned beef and burgers. Australia is very much attacking China on all levels of the market. Out of all the meat that is exported, 33% - according to Aaron - goes as certified Australian beef whereas the remainder would be more for the commodity market, labelled as Australian but not branded to the consumer as such.

The MLA believes the arrival of the supermarket culture has allowed growth in the market to be far more accessible than previously. The MLA is now working with wholesalers who would be selling product on to the wet markets.

Although being bombarded with stats in this meeting the key learning I take away is that the approach Australia is making to its overseas markets is centrally driven by the MLA and other government bodies. I am looking forward to getting to China as I know that the UK have recently sent their delegation to push trade agreements and considering that the ADHB only have 2 people on the ground in China at present it bodes well for the UK's future.

5.V Wet Markets - Nelsons Street, Kowloon, Hong Kong

When setting out my plans for my Nuffield trip one of the experiences I was most looking forward to was touring the wet markets both in Hong Kong and in China. I had heard so much about these places - some good and some bad - so the first morning I arrived in HK I immediately jumped in a cab and headed straight for the well known wet market of Nelsons Street in Kowloon.

Fortunately for me my time in Asia was spent in January when the temperatures are favorable for experiencing raw meat ... quite cold! The immediate impression of the wet market is the buzz and noise. This is not just a shopping place for people but also a



social experience. In China you must remember there is the one child rule. This has much significance; both parents tend to work and it is the grandparents who go and do the shopping, look after the children and prepare meals etc. It is fair to say that vacuum packed products are viewed with some apprehension by the Chinese and it is not until you experience the wet market can you understand why. Fresh is the key word in the wet market. If it wasn't killed today it would be still alive and kicking. The meat is prepared each day and I imagine this system is the only way the Chinese get around dealing with the extremely hot temperatures in the summer months as I did not see a great deal of fridge space.

In the UK butchery is an art form and the sad thing is that this skill is being lost as it is not seen as a glamorous profession to go into and the numbers of youngsters entering the trade are few and far between. Hours are spent breaking down the carcass so as to maximise the yield and of course to make sure as little as possible is wasted and only bone is left. In China this is not the case at all as probably the most valuable parts are just the scraps of meat left on the bone. To put it simply what we think of as waste they think of as premium, whether it be offal, skin or just feet.

Walking through the market, which is endless narrow gangways of individual stalls and butchers with some carcasses on the floor and others hung on rails, it is soon very clear that the Chinese view of meat is very different to that of the Western world. In the West there is this view that where food comes from, i.e. the meat and the animal, need to be separated as this is too close a link from our fluffy image of the cow. In China this is not the case. When I say that there are carcasses in the market I mean that some of these still have the fur on and when you buy an oxtail, this really does mean you buy a cow's tail with the fur still on. I left feeling inspired by the fact that the Chinese are a nation that is not fussy and does not waste anything. Every last part of that carcass is valued even down to the eyeballs and the stomach - in some cases these are the most valuable parts.

Watching people shop it was clear to see that they were incredibly knowledgeable about food. There was no doubt that they knew what every piece of meat was. One of the battles in the UK butchery market is that customers, and by this I mainly mean young women and mothers, feel intimidated by butchers as they are not at all sure about the differences between topside and silverside etc. As a result there is a growing shift away from butchers' shops and more towards ready packaged meat. Butchers have had to compete with this by putting pack counters in their shops where the customer can just pick and take meat as he/she wishes.

You move from the meat section on the fish market and then you see what is meant by a wet market. A fish bought in China could not be any fresher as you choose your



supper directly from the tank. Once selected this is then de-scaled, deboned or filleted and prepared for you to take home ready for the pan.

Immediately you are hit by the difference in shopping experience and the fact that we are so detached from our food in the UK. Later in this report you will read about my experience looking at the major supermarkets in Beijing. They have gone to great lengths to try and replicate the experience you have in a wet market rather than just rolling out their normal formulae.

My lasting impressions of the wet markets, and I was fortunate to visit many, was that although in the heat of the summer you would question the hygiene and health standards of the meat, overall they were clean and volume based establishments. People shopping there liked the fact that they could see the carcasses being cut up as this was a clear sign of freshness. Although there was no overall vibe of a desire to know where the meat was coming from, some I am sure was local but certainly, when stealthily inspecting, some boxes were also imported.

5.VI A formal lunch with the Head of China Air Sea Rescue – Captain Tsong



While in Beijing I was very keen to experience food as eaten by the Chinese and not just behave like a tourist in a foreign country eating at all the places they want you to see. I was incredibly fortunate to be invited to lunch by Captain Tsong, who runs the China Air Sea and Rescue Service, an organisation that is the equivalent of the RNLI in the UK and employs some 30,000 people.

The whole experience highlighted the colossal differences - in both the foods and the eating experience - between the East and the West. The meal is an eating experience where volume is not the focus but flavour and choice is. There were 17 dishes on offer from sushi to soups, and lobster to extremely hot fish that almost blew my head off. There is a certain theatre about the experience where it is customary to toast each other whenever you have a drink. The meal was washed down with a very good bottle of Chinese red, not something I was expecting but very pleasantly surprised about.



The meal highlighted to me the differences in our cuisine. Chinese food firstly is very different from the classic takeaway in the UK and is focused on many different elements. The Chinese view of food is closest to the French and Italian idea of food; far more sophisticated than in the UK. There are cooling foods and heating foods Yin is cooling, foods such as duck, beef, Chinese cabbage and melon. Yang is heating, foods such as lamb, red beans, spinach and, dare I say it, dog. Pork is seen as neutral and eaten all year round. The combinations are important i.e. the mix of colour, form, texture, origin as well as the balance of sour, sweet, bitter, pungent and saltiness and freshness. It looks simple but it is actually very complex.

The other main observation is that in all the dishes there are no great lumps of meat like we prefer in our Sunday Roast. All meats are very finely sliced and marinated or used as the foundation of a stock or sauce. In the basic sense if you are always boiling and marinating your meat the fact that originally it was not that tender becomes somewhat irrelevant, and you could also say the same about the flavour.

The eating experience in China is core to their culture. If you look in their houses kitchens are a functional space to provide food but the eating area is at the core of the house and the invention of the Lazy Susan is testament to their belief that spending time sharing a meal is of vital importance to relationships and relaxation.

I must thank Captain Tsong for this unique and authentic experience. I will not lie; there were some foods that I baulked at but, for me and my family who were able to join us, this was a very special day indeed!

5.VII Beijing supermarkets

China is rapidly evolving the supermarket culture with the major players, Tesco, Walmart, Metro, Ole and Carrefour, etc, all present. Wherever I am in the world I always think you can learn a great deal about a country by having a look around its supermarkets and food shops. There is a perception that international supermarkets are standardised all over the world – well, just walk into a Tesco in Beijing and you will see that this is certainly not the case.

My thanks must go to Peter Bloxham for taking the time out to host me in Beijing and, through his many contacts, introducing me to the Chamber of Commerce in Beijing as well as having a most enjoyable day looking around the many supermarkets in the city.

International supermarkets are successful because they have a clear understanding of their target market and know exactly what they want to buy. It is exactly this ethos that



the British meat industry has to take on if it is going to market its products overseas. When you walk into a Carrefour store in Beijing you can clearly see how they have adapted their shopping experience to the Chinese culture. Taking on board how meat, fish and fruit and veg have historically been bought in wet markets or street markets they have done their utmost to try and recreate this atmosphere and experience. You walk along the fish and meat section and there are the live fish tanks and men individually de-scaling your supper for you.

The advantage of being in a supermarket for me was that everything was labelled with prices and as a result I was no longer affected by my lack of language skills. Although I had always been told that the Chinese value the 5th quarter products I did not realize quite how much they were prepared to pay for them. Walking along the counters as seen in the photos on the next page, chicken legs and heads are valued at the same price as a chicken fillet, RMB 22.8 / kg. Equally in the beef section the fillet is as expensive as the shank and stomach. What amazed me was that a chicken foot is the same price as a fillet. The Chinese are equally amazed that we would pay so much for a chicken fillet.

It must be remembered that there is still a relatively small number of supermarkets in China. These tend to be city based and there is still no centralized buying, so what you see in one Carrefour store will not necessarily be the same as in the next. It will take time to usurp the wet markets. The supermarkets' positives are that they are air conditioned, a pleasant environment, and most importantly the food is sold with a government guaranteed quality. Packs are clearly labelled and offer quality but generally fresh foods are seen as more expensive than in wet markets. Supermarkets are not in the best locations and you often require a car to go to them so this immediately affects the amount of people who can use them. If people think that supermarkets will wipe out the wet market overnight they are wrong as Nelsons market is still very much buzzing after two decades of the supermarket in HK.

The proof of how supermarkets are trying to compete with the wet market is the way the former are trying to create the same sort of buzz. There are lots of demonstrations and vocal traders who scream out bargains as you would in a wet market. There are aisles of traditional Chinese food products - Carrefour fresh meat is brilliant - live soft-shelled turtles of all ages, both farmed and wild. What we value as Westerners i.e. lean, fat-free meat, is not demanded in Chinese supermarkets. Chinese like the fat and bones; feet, wings and head are premium products.





Pigs Trotters in great demand



Chicken Feet RMB 22.8 / kg



Chicken Fillet RMB22.8 / kg



Live turtles for supper



Branded Black Pigs



Demonstration videos



5.VIII Glory Foods International Ltd

Glory Foods International Ltd is an import/export business based in Hong Kong that distributes all over China. It is focused on wholesaling frozen meat and poultry, bringing goods in from the Americas, Europe and South East Asia. The main product lines concentrate on offal and it was on this that I wanted to focus my meeting with Alice Low, the sales director.

The aim of this study has been to see if there is a market for British meats in China and South East Asia. So far I have just looked at all the different factors and, if honest, looked at the market place in China/Hong Kong as a whole rather than specifically focusing on either the premium market or commodity market. Glory Foods distributes over 30,000 Mt of frozen offals a year, and through my knowledge of the abattoirs in the UK and the fact that the only products we at Medium Rare have left over at the end of the week are offal, I wonder if there is a market for the UK?

At this end of the market, which is very much the commodity end, product is bought on spec and price. Is there a market there for the UK? Yes, very much so, but only if you can meet the spec and are happy with the price as there will be plenty of other competitors vying for the business. Products that Glory Foods are interested in are feet, hocks, ears, tails and tongues from pork and, with regards to beef: rib fingers, flank and short ribs. It is the chicken side though that is of interest. In the UK processors pay to get rid of feet and heads especially. With an export market willing to pay just over \$100/ton could this be an opportunity? Although processing is involved I have no doubt that, provided you could get the UK processor to pay you for taking the feet etc away there would be a healthy export market. The key is getting the small processors to work together and of course being aware of the risks of which there are plenty. Dealing with Asia is not for the faint hearted even though you can protect yourself credit-wise through letters of credit etc. But if the goods are not collected promptly at the port or if any paper work is missing wharf fees can be extortionate.

On leaving my meeting with Alice at Glory Foods I was in no doubt that there are possibilities for this market; you just needed quite big balls to do it!



6. Defining our offering

Having completed my travel and now sitting down writing my report I have no doubt that there are many different markets for the UK in Asia. My major concern having seen the systems in place within the Australian meat industry is that currently the UK meat industry is not in a place to maximise these.

The UK is continually facing a battle on price against its competition and more often than not losing the battle due to more regulation and higher costs, such as labour and fuel. At the same time we are being told continually that with the ever growing population of the planet we need to produce more food (Food 2030) and at a cheaper price to the consumer.

My view is fairly simple; there is no way that the UK can be a commodity producer. While I write this I know that one of my fellow Scholars, Helen Thoday, is focusing on this very point with regard to the pig industry. I just hope she agrees with me.

The UK is fortunate enough, and in many ways unique, in that it has one of the most discerning and knowledgeable markets on its door step, the UK public!

UK consumers are more than happy to spend £200 on a pair of Diesel jeans and some women don't think twice about spending £1000 on certain handbags. If you look at the UK wine industry for many years nobody drank British wines as they lacked a certain depth of flavour and were a poor comparison to the more established rivals on the continent. Now if you look at champagnes from the south coast this is no longer the case and in many reviews they are now outperforming their French rivals both on flavour and price. My point is that you cannot just talk a good game on quality and expect to charge a decent price; you have to clearly define what you are offering and make sure that, having researched the market, there is a demand for what you are offering. Then and only then will the consumer pay a premium price and buy based on quality, with price then becoming a far lower priority to the consumer shopping experience.

Looking at the opportunity to export we have to remember that the likelihood is that our product when on the shelf will be twice as expensive as the local offering. This is not to be used as an excuse as there are many products that compete in these conditions and succeed. Peter Bloxham for example imports English ales in to China. Now he has to compete with local lagers at a quarter of the price when he is selling his beers for up to £5 a bottle in the supermarket...they still sell as they are different to the competition, consistent and desired.



Having worked in the UK meat industry now for the last five years and through this Nuffield experience been able to travel and see how other countries' industries function, I firmly believe that we in the UK are talking a good game on quality and not consistently delivering it collectively.

Personally I am more aware than most of the great things that are being done by farmers. My issue is that these are being mixed in with all commercial producers and thus blurring the reputation of brand UK.

One of the battles the UK faces is its history of food diseases, whether it be BSE, foot & mouth or blue tongue. When you speak to a food buyer in Asia they are aware of these historical problems and this obviously affects their buying decisions.

Currently in the UK meat industry there are a number of different quality standards, whether they are EBLEX, BPEX or the Red Tractor. In my view these are there more as package decoration than actually making a difference to the quality of the end product and in my view should now be seen as minimum requirement rather than as a standard of quality. They certainly don't ensure consistency.

The UK needs to set itself apart from commodity producers by bringing in its own MSA type set of standards. By doing this we would then be able to define our offering and not only be able to educate our own domestic consumers but set ourselves apart on the international market with defined USPs. The industry needs to make wholesale changes not only to ensure that the producer is well paid but, almost more importantly, that the consumer gets what he wants.

So what would be my parameters for defining our offering? :

- Make UK meat premium and exclusive.
- Create a system that rewards the farmer for creating a good product. This can be done by pricing to cost. We are not trying to compete with the market but to create our own market. If we get it right people will pay, this is proven worldwide!
- Clearly define the breeds of animals to be acceptable based upon giving maximum flavour to the product. Use good breeding and genetics to maximize these results. It has been proven that we have the best breeds in the UK. Why don't we base our industry on them?
- Ensure good welfare and a sustainable system of production.
- Control the supply chain through similar tests as in the MSA; we all desire consistency and this is the only way to get it. Remember we are creating a great tasting product for the consumer, not creating what the farmer wants to produce.



- Have a uniformed brand that will cover all meats, the criteria can be generic and applied to the meat category.
- Be ruthless with product that does not meet the criteria; reputation takes a long time to build but can be eroded in seconds.
- Go further and define how the product should be cooked and served; people need to be educated as, if meat is cooked poorly, it will be considered that you are at fault.

A lot of what is written above is already being done on an individual basis and with different constraints and different terms. What we need is for the industry to take a grip and introduce a national scheme that requires product to be certified British. The aim of this scheme is not to be farm assured; by no means does that say the product will taste good. This proposal is far reaching and is to encompass the entire supply chain. The goal has to be changing meat from being a product and making it consistently attractive as a food.

It is my view that if this was done successfully and, with the buy in of the industry and independently controlled by a governing body, not only would it transform the domestic market but give us a real standout offering with which that of to enter the overseas market.



7. Conclusions

- When the income of the average Chinese person increases to upward of 7,000 USD are we expecting people to drop their native cuisine and start eating rib eye steaks? It is naive and profoundly arrogant to think that our cuisine is better than that of other nations and that with wealth they will just switch to the Sunday roast.
- If you look at a Chinese recipe book, it is very clear that the cuisine is far more complicated than that of the UK. Kitchens in Asia are dominated by the stir fry and soups. Eating together is central to the culture and culinary heritage. Eating out in a restaurant it is clear when sat round a circular table with 17 dishes on offer that this is a social experience of foods that are hot, fragrant, spicy, aromatic and zingy ... very different to the English hotpot or classic meat and two veg.
- The use of meat is very different in China, where what are prime cuts to us are deemed to be lean and inferior cuts of the carcass. The Chinese focus on 5th quarter products, meats that have high levels of fat. Bone has great value and is the basis of many of their soups and stocks.
- Chinese people like to project a classy image – brands (international) mean everything to them.
- Status is important to Chinese people – people want to be seen to be doing well and progressing.
- China is rapidly evolving into a supermarket society. Major players – Tesco, Metro, Walmart & Carrefour are all present.
- It is important to understand the shopping experience in China and not just assume that, because we like something, they will.
- China has had the misfortune to experience food scares, in particular the outbreak of melamine in their milk. This has added to the appreciation of international brands and trust in overseas products; but this is purely down to the lack of trust in some of their own nationally produced products.



- It is fundamental to understand where our product fits into the culture heritage and day to day cooking practice. It is a great market but a complex one and a difficult market to crack.
- We are not in a position as a country to compete on a commodity basis so let's not try to. Create a premium brand that's based upon all the factors that make us expensive. We have regulations for a reason; these should be reflected in our offering.
- As an industry we need to work collectively, punching the same message out to both the domestic and overseas market. This should be centrally led with *one* meat body, not a different body for each producer. This body should be focused on what the consumer wants to buy, not what the farmer wants to produce.
- Be proud of what we have to offer. We have the best breeds, extensive knowledge of practices and are scientifically and technologically advanced enough to build a system that can ensure consistency and quality.
- Remember if something is good people will pay for it.



8. The effect of Nuffield

Writing this final chapter having completed the rest of my report I can now reflect on my Nuffield experience and what impacts it has had on me.

What I have not alluded to in this report is that during my Nuffield Scholarship I have been through some big life changes. I have left Medium Rare, the business I set up and ran, and am now working for the time being in a non agri-related job in London looking after the logistics of coal.

In an ideal world I would still be running my meat wholesale business. As I hope this report conveys, it is an industry that I am very passionate about, but one of Nuffield's great strengths is that it gives you the time and opportunity to look at your life from a distance and assess how you are doing and in the cold light of day be critical and make tough decisions. While away on my travels in January I was able to be very honest with myself and realise that what I was doing was not going to enable me to reach the personal goals that I have for my own and my family's lives. The choice I was faced with was whether spending another five years working hard on my business was going to make a major difference. Upon reflection I felt that with the business having certain constraints that were out of my control to change I was better served making the difficult decision to have a fresh start at 31 rather than wait until I would be 36.

I now have moved back to a bank and am using my logistics and supply chain experience to move coal around the globe as opposed to moving meat around the country. I am fortunate that I am working for a business that has a big presence in the agri trading space so I hope it is not too long until I become involved in the ag. world again. I firmly believe that it is one of the most exciting and safest industries to be in as we are all, always, going to have to eat.

While the above has been a difficult transition for myself and my family I am convinced that if it was not for Nuffield I would probably still be working in my meat business and facing more difficult times ahead. Through my Nuffield experience, travel and many conversations I was able to speak with people about my business openly and without the inhibitions that can often conceal real truths when speaking with people you directly know. Nuffield gave me the opportunity to spend 6 weeks looking at similar businesses and speaking with successful like-minded people in the industry who were willing to be honest and at times brutal with their opinions. It is exactly these conversations and the time to reflect that enabled me to make one of the hardest decisions to date. There is a lot of pride involved when you start your own business, you do not want to be seen as a failure and you have a belief that if you put the hours it will be all right in the end.



When you become a Nuffield Scholar you are told that the experience will open your eyes and open your mind. I can personally vouch that this is the case and if I had not gone through this experience I firmly believe I would have been far slower in making a decision that was critical to my business and personal future.

Nuffield has been a thoroughly rewarding experience in what has not been the easiest of times. I have created friendships that I look forward to putting a lot more time into in the future and learnt not only a great deal about the subject I chose but also about many subjects I would have never looked at. I must personally thank my sponsor and Nuffield for giving me this wonderful experience and allowing me to join a network of which I look forward to being an active participant in the future.

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9. Appendix

Key People and Organisations to thank!

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