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Report

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Movers and Shakers in Global Pig Production

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1.0 Executive Summary

I am the General Manager of the National Pig Association, a very small but perfectly formed organisation that represents the interests of commercial British pig producers to government, Brussels, retailers and processors. I am also a celebrated pig geek. Having developed my passion for pigs rather later in life, I have spent the last 17 years trying to catch up.

Managing a lobby group that represents around 70% of the commercial pig herd with only three staff, it is essential that we influence effectively. Whilst many would say that we already work very well, learning is a continual process and there will always be improvements to be made as pressures and challenges change. The industry in which I operate is very significant globally. Pork is the most commonly consumed meat in the world, with 104 million tonnes produced every year from 1.2 billion pigs and it is traded in large quantities. As a country which imports 60% of the pork that we consume, the UK is largely at the mercy of price fluctuations on the EU market which in turn is affected by global production. There are many big and powerful players out there that we have much to learn from, and my Nuffield study therefore focussed on identifying who in global pork production has the biggest influence and the techniques that they use, to see if there are any that we may be able to employ here in the UK. Not only did this teach me about pork production in the world and allow me to indulge my inner geek, it also allowed me to see how I, and others in smaller lobby organisations, can be better at what we do and influence more

effectively with limited resource. In addition, I was able to gain an excellent understanding of the different cultures and drivers within the countries that I visited.

The countries I visited were chosen specifically because of their differing markets: China as an emerging and rapidly changing market, Russia as an expanding one, America as an established one, Canada as a recovering one and Germany and Lithuania within Europe as the home market and therefore perhaps the greatest influence on the UK. Each country presented such differing challenges and opportunities, from one extreme in Europe where beleaguered pig producers are suffocated by often conflicting legislation, powerful pressure groups and unhelpful governments, to the other extreme in Russia and China where, financially supported by their governments and unfettered by regulation, pig businesses are expanding at a rate of knots and charging towards self-sufficiency. America and Canada have their own challenges from pressure groups, but as such established and relatively cherished markets they have been less affected by outsiders and much more by in-fighting, although this too is changing.

Interesting too is that it is not always those you assume have the most influence in a country that actually do in practice. In America for example, it is the processors or packers and not the mighty retailers who rule the roost. In China, Communist rulers may well have overarching power, but as almost everyone in



China either works for or has connections to local government, the people have much more of a say than an outsider would think. In Lithuania, with one of the lowest numbers of pigs per hectare across the EU, the environmental lobby groups have been so successful that they anticipate no new pig units will be able to be built because of odour complaints – when very few people actually live near pig units.

There were many examples of impressive lobbying techniques across the countries that I visited – some of which will be of use to small reputable groups like ours and some, whilst rather effective, we wouldn't touch with the proverbial barge pole! My report looks at the most common tactics in more detail but in reality the most powerful by far was the use of people, and the more the better. In every country, either farmers or the public had been used to raise an issue, build the pressure behind it and achieve action, as long as they gained enough media coverage to fan the flames of interest. The American Farm Bureau was very good at this, getting 4-5,000 farmer members a year direct access to government leaders, and ensuring that they were properly briefed beforehand to keep them on message. Forming alliances with similar groups is another way of getting yourself heard. Eurogroup for animals, representing 40 welfare lobby groups mainly across the EU is a good example, as welfare has never been so thoroughly debated across the EU until now.

The benefit of long term relationship forming was often highlighted. Foreign companies looking to set up in Russia will not flourish if they don't have good connections or money.

Those that come in, integrate into the Russian way, learn the language and accept the culture, are much more likely to succeed, as pig genetics company PIC has shown. Being positive and coming with solutions, not problems, is one that the Canadian pork producers used to their benefit. Their approach to a financial crisis in 2008 was praised by government and consumers alike and provided struggling producers with much needed loans.

Many countries highlighted concern over the growing knowledge gap between consumers and farming which pressure groups exploit. There are plenty of positive examples where people have tried to redress the balance and educate the consumer, influencing their decision making process and allowing rational purchasing choices to be made. There were also examples of ineffective lobbying, where great effort was expended for no benefit, highlighted particularly by the American farm lobby groups who fought for country-of-origin labelling which did nothing for their own members but almost destroyed the Canadian pig industry, so there are lessons to be learnt there too.

Conclusions and recommendations

People power is king. The more people that you can get saying the same message the quicker it will become one worth listening to. Smaller lobby groups should cascade their messages though as many people as possible, members, consumers, MPs and MEPs alike, to amplify and give weight to what they are trying to say. Form alliances with similar organisations where possible and in different countries,



identifying common areas for concerted lobbying activity.

Plug the knowledge gap. Lobby groups often use lack of knowledge to their advantage so it is vital that we provide evidence based information that is honest, easy to understand and unbiased in order to allow people to make a balanced and informed decision. Social media, myth busting websites and video footage can and should be used to our advantage.

Take time to develop relationships with key influencers. This can be hugely effective and stand you in good stead with those you seek to influence. Choose the person or organisation wisely, learn about them, their language and culture. Give sensible advice, prove your

worth and gain trust. You are much more likely to succeed if you approach people with solutions and be constructive rather than simply raising issues and expecting others to solve them for you.

Focus people! It is easy to lose your way and get caught up fighting for something that will bring you no benefit or that you have no hope of winning and for small lobby groups, this can be disastrous. Pick your battles, understand your target audience and evaluate the expected outcome before jumping headlong into a campaign. Be aware of unintended consequences. Plan ahead as far as you can for key challenges that you know you will face over the next few years but remain flexible enough to react to new issues as they arise.



2.0 Introducing Zoë Davies

Nuffield Farming Scholarships were always a bit of an enigma to me. As I was not originally from farming stock, I was of the opinion that only an elite group had access to such an opportunity - passed down through generations, along with the special handshake. But as my career in the pig industry progressed, and more people that I knew and respected appeared to have completed one, I realised that I was mistaken and that here was something worth investigating after all.

Born and raised in Sussex, I spent many happy hours on the South Downs with my mum who sparked my interest in all things living and inspired me to study Zoology at University. Leaving three years later with a decent degree and an obsession with orang-utans, I finally focussed my interest in animal behaviour on a far more sensible subject and began a PhD looking at the welfare and behaviour of outdoor sows. Several years later I went to work for a large integrated pig business in Suffolk and ended up running their indoor rearing and finishing unit.

It was during the swine fever outbreak in 2000 that I really began to respect the industry and knew that this was where I would eventually end up, but since we had had the disease on the farm, I have to say it knocked me for six and I needed some time out and to go somewhere I felt that I could make a positive difference.

So in 2002 I went to work as a Senior Scientific Officer in Defra with responsibility for



livestock research. Although it was good to understand how policies were developed and how influential some individuals can be, Defra's policy towards environmental protection changed in 2004. Whilst important as a policy, it came at the expense of any support for the industry. Livestock were simply seen as polluters of the land with no tangible benefit, efficiency was a dirty word and Defra and I began to fall out. Thankfully by 2007 the realisation that food security was actually quite important had started to dawn and the policies began to shift back towards production, albeit sustainably, once again. By this time however I was ready for a new challenge and in 2008 decided to take all of my research, industry and government experience back to the pig industry and to a lobby organisation called the National Pig Association.

Whilst at the time I may have been named gamekeeper turned poacher, I knew that I had made a good choice. I have to say without doubt (or prejudice) that this is the best job in



the world. Fighting hard every day for those who can't fight for themselves, influencing officials, advising on policy and negotiating better terms is the most rewarding thing I have ever done. I finally I feel that I am making a difference so it's really important to me that I get the job right which is primarily the reason that I wanted to do a Nuffield Scholarship; to help with my own development but also to make the NPA stronger.

I have to say that I have loved every minute and although finding the time to fit it all in has been challenging, the rewards have far exceeded any expectations I may have had. I am now a part of a wonderful organisation and look forward to helping to ensure that the Nuffield Farming Scholarships remain popular and respected for many years to come.

I have yet to discover the secret Nuffield handshake. I may just have to invent one.



3.0 UK pig industry under fire

As a country which imports 60% of the pork that we consume, the UK is largely at the mercy of price fluctuations on the EU market. Whilst some retailers such as Waitrose and Morrisons support and protect the home market, the volume sellers such as Tesco and ASDA price their products competitively and source accordingly, mainly from within the EU, but certainly at the cheapest price. With a pork production chain that prides itself on its higher welfare credentials the UK is vulnerable and finds it difficult to compete with its European neighbours. Unlike EU pigs, which are predominantly housed indoors on fully slatted concrete floors, 40% of our sow herd is permanently housed outdoors and 90% of the indoor sows and 60% of the finishing herd is housed in straw based systems, which means that our higher welfare rearing systems come at a cost. This is why UK product is often sold within premium lines.

Even with such impressive credentials, the UK pig industry is constantly under pressure to do better. Whilst as an industry we need to focus on maintaining a good health status, protecting against new and exotic diseases and improving herd performance, relentless lobbying from welfare and vegan pressure groups in the UK is geared towards criticising our already high welfare standards, preventing growth and expansion, stifling innovation and promoting a return to peasant farming. I don't disagree that we ought to constantly strive to improve welfare, be more environmentally sustainable and socially acceptable, but in order to do that, we need to be able to move with the times, embrace new technologies and,

dare I say it, be allowed to run profitable businesses!

Sadly, a great disconnect has emerged between the consumer and the farmer which certain groups often take advantage of, using a variety of media to spread their scare-mongering propaganda. Improvements in connectivity and the increasing popularity of social media has made it much easier for consumers to have a say, even if they don't really understand what they are fighting for. This has unfortunately led to plenty of knee-jerk policy making which often makes the situation worse for the British pig and something that we need to be able to tackle and prevent, certainly better than we do at present. As a small lobby organisation with limited resources, it is vital that we represent and promote our industry to best effect and ensure that our members have a future doing what they love best, raising pigs and producing tasty British pork! When I started thinking about my study topic, I just wanted to learn about global pig production and take everything in, but I realised that by making it more focussed and specific, I could not just learn, but also teach. With good counsel from John Stones and my sponsor BPEX (in the form of Richard Longthorp), I tweaked the study slightly to look at who is influencing global pork production and the techniques that they use to see if there are any that we may be able to employ here in the UK. Doing so would not only teach me about pork production in the world, but also how I, and others in smaller lobby organisations, can be better at what we do and influence more effectively



4.0 Understanding global pork production

Pork is the most commonly consumed meat in the world, with 104 million tonnes (MT) produced every year from 1.2 billion pigs (Table 1, USDA, 2012). As such, it is an important global commodity and is traded in large quantities all over the world. Pork is particularly desired in Asian markets, and no more so than in China where increasing affluence has led to a more protein based diet and therefore a demand for pork that currently outstrips production. Russia, another pork loving country, also currently relies on imports to satisfy demand and this is likely to continue as both suffer from severe disease outbreaks

with Foot and Mouth Disease in China and African Swine Fever ravaging Russia (Rabobank, 2012). Such protein hungry countries drive global pork production allowing other countries, such as the US, Germany and Brazil, to grow their markets to supply them. Even the UK as a net importer has managed to break into the lucrative Asian market by exporting so-called 5th quarter products – the parts of the pig that the average UK consumer turns their nose up at (ears, stomachs, intestines and trotters) - that the Chinese will pay more for than the muscle meat. They eat everything but the oink!

Pork Selected Countries Summary 1,000 Metric Tons (Carcass Weight Equivalent)						
	2008	2009	2010	2011	2012 Oct	2012 Apr
Production						
China	46,205	48,905	51,070	49,500	51,280	51,600
EU-27	22,596	22,434	22,571	22,750	22,480	22,615
Brazil	3,015	3,130	3,195	3,227	3,295	3,311
Russia	1,736	1,844	1,920	1,995	2,020	2,100
Vietnam	1,850	1,910	1,930	1,960	1,960	2,000
Canada	1,786	1,789	1,772	1,770	1,765	1,775
Japan	1,249	1,310	1,292	1,267	1,280	1,275
Philippines	1,225	1,240	1,255	1,260	1,265	1,265
Mexico	1,161	1,162	1,165	1,182	1,180	1,215
Korea, South	1,056	1,062	1,110	837	1,010	982
Others	5,348	5,319	5,436	5,582	5,432	5,657
Total Foreign	87,227	90,105	92,716	91,330	92,967	93,795
United States	10,599	10,442	10,186	10,332	10,466	10,562
Total	97,826	100,547	102,902	101,662	103,433	104,357
Total Dom. Consumption						
China	46,691	48,823	51,157	50,004	51,560	51,995
EU-27	21,024	21,058	20,841	20,564	20,595	20,505
Russia	2,842	2,719	2,835	2,940	2,719	2,999
Brazil	2,390	2,423	2,577	2,644	2,726	2,697
Japan	2,486	2,467	2,488	2,522	2,489	2,528
Vietnam	1,880	1,936	1,940	1,995	1,990	2,035
Mexico	1,605	1,770	1,774	1,690	1,755	1,775
Korea, South	1,519	1,480	1,539	1,487	1,510	1,530
Philippines	1,270	1,298	1,358	1,358	1,354	1,364
Taiwan	897	925	901	894	846	921
Others	6,517	6,486	6,621	6,849	6,828	6,950
Total Foreign	89,121	91,385	94,031	92,947	94,372	95,299
United States	8,813	9,013	8,653	8,339	8,526	8,481
Total	97,934	100,398	102,684	101,286	102,898	103,780

Source: USDA-FAS attache reports, official statistics, and results of office research

Graph : Amount of pork generated by the major pig producing countries



The countries that I visited were chosen specifically because of their differing markets:

- **China** as an emerging and rapidly changing market
- **Russia** as an expanding one
- **America** as an established one
- **Canada** as a recovering one
- and **Germany** and **Lithuania** in **Europe** as the home market and therefore perhaps with the greatest influence on the UK.

Since they all have such different market drivers, I want to take you through each briefly so that you can see how pork production in these countries works and who the major influencers are.

4.1 Europe

Europe itself is the second largest pork producer in the world, producing almost 23 MT of pork. Around 9 MT of that is produced by Germany and Spain, the two largest producers, and both have thriving export markets outside the EU. As the largest producer and most prolific pork exporter, I visited Germany. I also went to Lithuania, which is a relatively small producer but is heavily reliant on Russia for survival. On both occasions, I went to the European Pig Producers Congress, and was not only treated to some excellent presentations from leading figures within the countries, but also used the opportunity to network and learn from pig

producing colleagues from all over Europe. I list below the key characteristics of the pig industry in Germany and Lithuania.

I also visited Brussels on several occasions as the centre of political lobbying for the EU. When you compare Europe to the rest of the world, it is shocking to see how restricted Europe is in terms of regulation and lobbying by pressure groups. I can certainly see why companies look to other countries to trade and produce their pigs!

I detail my findings in Germany and Lithuania starting on the following page:



4.1.1 Germany (Munster, 19-22nd May, 2011)

Production:

- Second largest sow herd in the EU at 2.2 million head (behind Spain at 2.4) and 65 million pigs in total.
- Largest pork producer in the EU producing 5.4 MT in 2010 (*Pig International, 2011*) due to the trade of weaners and finisher pigs coming in from surrounding Denmark and Holland (10 million in 2011) that are reared and slaughtered in Germany.

Strengths

- Supportive government with 'tax bonus' of €10 per pig place for pig producers with the right pig production to crop land ratio.
- Already 115% self-sufficient, Germany is focussed on exports and extracting as much value from the pig carcass as possible, particularly through further processing. Significant investment has been made in slaughtering and processing facilities to accommodate imported pigs.
- Very good country infrastructure which means that input costs are lower and therefore so is the cost of production – worth an estimated €8-10 per pig.
- Germans love pork! They will eat 54kg of pork products per head per year on average compared to the UK where consumption is only around 25kg (*BPEX, 2009*). Demand is therefore strong.

Key Challenges:

- Characterised by small family farms with 1.5 people per farm, succession is a big issue particularly for piglet producers.
- Planning – farms that don't have enough supporting crop land become classed as 'non-agricultural' which allows local communities to have more say over what is built and often stifles expansion. Non-agricultural farms are also not eligible for the tax bonus. As a result of this we may see a shift in production from North to East Germany where requirements are currently less stringent.
- Environmental issues – the soil has a high phosphorous content so there are restrictions on fertiliser use and the spreading of manures. There is competition for land with intensive production and biogas plants (of which Germany has about 6,000) needing feedstock (such as maize). The value of land for rent has increased to €1,000/ha/year so slurry has to be exported rather than spread on rented land. Most farms have air scrubbers to control ammonia and dust emissions from livestock housing, all of which adds cost.

Major influencers

- Processors have the most power because they drive the export market that the pig industry relies upon. They apparently use the oligopolistic market structure to keep the price of pigs low. Tonnies is the largest processor, slaughtering 140,000 pigs a week and exporting 53% of what they process to 78 different countries.
- Of pork that is sold on the home market, the discounter is king with 38% of the market share (compared to 3.7% in the UK). Retailers don't have much of a foothold yet but are gaining. They are trying to vertically integrate parts of the value chain by creating more processing plants and putting pressure on them to make profit in-store by adding value.
- Welfare lobby groups are very influential and well-funded using carefully targeted media campaigns and shock tactics to best effect.



4.1.2 Lithuania (Vilnius, May 30-June 2 2012)

Production

- Lithuania has a relatively small National herd of 70,000 sows housed on 96 farms.
- Similar to the UK, the number of pigs in Lithuania has dropped dramatically over the last 20 years, from 2.5 million down to 790,000.

Strengths

- Lithuania has good potential for agriculture if companies can work with the legislation as only around 50% of available land is currently farmed. A favourable climate for growing crops also allows pig producers to source grains locally.
- Danish company Saerimner currently own 525,000 pigs (2/3rds of the pigs in Lithuania). They sell half the pigs for slaughter in Poland thus benefiting from better prices and are able to bulk buy inputs to keep the cost down. Recently however the company has said it is going to pull out and re-focus its attention on the more lucrative Russian market.

Key Challenges

- Even though Lithuania has one of the lowest densities of pigs per hectare across the EU at 0.4 pigs/ha, pig farmers here are struggling to survive. Severe pressure from so-called environmental lobby groups concerned about odour emissions has meant that although most of the pig farms were built 30 years ago by the Soviets, there will be no new farms because they will not get planning permission. Farmers are also prevented from refurbishing existing buildings so those farms that are left are slowly falling apart.
- Pig farming is highly regulated and suffers from an unsupportive overzealous inspection regime. One farmer said that, in his region, 10 farms were being monitored by 26 institutions. There are many stringent regulations in place to control odour, farmers even have to monitor emissions on the land they apply their slurry to, even if it is not theirs.
- Another problem that they face is unfair competition. In Lithuania, the VAT is 21%, but in nearby Poland it is only 5%, so many of the processors and meat buyers simply buy cheaper Polish meat and sell it in the markets.
- In addition, the population is shrinking as young people head to other countries for better paid jobs, which leaves a smaller domestic market with diminished business potential. The impact that this has had is plain to see as there is much land in Lithuania that is lying fallow.

Major Influencers

- Lithuania is dependent on Russia for the trade of some of its live pigs for slaughter. This is a very risky strategy as Russia is apt to close borders at short notice for a variety of reasons.
- 10 slaughterhouses process 70% of the pigs, and whilst there are alternative options (such as Poland and Russia) many producers are reliant on them, although they are not particularly well regarded, or known for paying on time.
- Environmental lobby groups have effectively manipulated the general public and the government, and in doing so, sounded the death knell for commercial Lithuanian pig production.



4.2 Russia (June 2 – June 9 2012)

In complete contrast to Lithuania, Russia was quite frankly a breath of fresh air. They **love** agriculture over there, although it has taken a while for the revolution to really build momentum.

Since the break-up of the Soviet Union in the early 1990s, Russia has fought hard to find its feet and regain economic stability. Known for being very direct, intelligent and straight-forward, Russians remember what it was like to have nothing and now place great importance on showing everyone that they have moved on. Money and power, or at least the impression of it, is what drives the younger generation and they demand the best of the best.

They have the same attitude to food too. It has to be healthy and good quality (they don't like additives!) but also at the right price.

Eight years ago, President Putin made food security in Russia a priority aiming to reach self-sufficiency by 2020 (currently about 45-50% is imported). Land and privatisation issues were resolved and a series of incentives put in place, such as soft loans and import tariffs, to encourage production.

The companies that had made the money from oil and gas during the break-up of the Soviet

Union were the most likely to invest, initially buying land and growing crops before going into livestock. Large fully integrated companies began to emerge, and now 19% of pig production is in the hands of just three companies, and their growth has been phenomenal.

Two of these are based in the Belgorod region known as the agricultural capital of Russia, so called because of the rich fertile black soil and optimal grain growing conditions. **Miratorg** is one of those companies and is the largest pig producer in Russia. This impressive company has grown from 10,000 to over 115,000 sows in just 7 years and is still expanding – putting down a further 27,500 sow places in 2013 and already building its 3rd feed mill with a view to building a 4th next year.

As the Belgorod region becomes saturated with pig and poultry units, companies have expanded into other regions to cope with the ever increasing demand for meat. With such support from government and a total lack of restrictive legislation or pressure groups, it is easy to see how the self-sufficiency target will be reached.

So easy, that Russia already has its eye on China as a future export market for pork.

On the next page I detail my findings from Russia



My findings in Russia

Production

- 4.3 million sows producing 32 million pigs and 2.1 MT of meat in 2012.
- If Russia does indeed become self-sufficient in 2020, the 30% of pork that is currently imported from Europe will need to find a new home.

Strengths

- Since 2005, 8 billion roubles (£160 million) has been made available by the State for agriculture. Low interest loans are easy to obtain and the State owned agricultural bank is the 4th largest in the country.
- There is great potential in Russia for agricultural development, even for foreign companies. Those that understand the culture and language but also have money and good connections are more likely to succeed. Even in the last few months, several foreign companies have announced plans for large pig operations in Russia.
- Growth in the pig industry has been rapid as the price of pork is very good at around 86 roubles/kg liveweight (£1.70) and cost of production is low, as is the cost of fuel at 28 roubles (55p) a litre!

Key Challenges

- When Russia accedes to the WTO in August 2012, import tariffs will be removed and Russia is likely to use every trick in the book to protect itself from unwelcome imports.
- Corruption is still a challenge for the country, and although efforts have been made to try and stamp it out, the political system is such that it lends itself to abuse. Foreign companies are regularly expected to oblige if they are to do business there.
- Disease – particularly African Swine Fever. The Russian government admits that controlling the disease has been difficult with a large number of back-yard farms, illegal livestock/meat movements and wild boar in the country. Every region has a different way of handling the outbreaks and the lack of overall strategy is causing further spread. As pig production expands, protecting herds against disease will become increasingly important.
- Finding good staff is particularly challenging. There may be plenty of money going into agriculture, but there are no organised national training programmes for farm staff. Agricultural academies do exist but will only train to a basic level. Expertise is often sought from outside of Russia, but in order to be sustainable, better training at all levels is needed.

Major Influencers

- The big three agricultural companies, Miratorg, Agro-belogorye and Cherkizovo Group produce 19% of the pigs and are fully integrated, owning everything from land to produce feed, farms, haulage and processors right through to their own branded products. They are in a strong position to negotiate price with retailers.
- Federal government and regional governors will determine who does what and where in Russia. It pays to be well connected.



4.3 China (7-17th June 2011)

China is another country that is expanding rapidly in order to reach self-sufficiency. Perhaps one of the most fascinating countries that I visited, China is a land of contradictions that is changing at a rate of knots.

I travelled from Hong Kong up to Guangzhou in Guangdong, then on to HeFei in Anhui Province, then Hohhot in Inner Mongolia and finally to Beijing. Everywhere we went agricultural land was being razed to the ground to make way for roads and housing developments. Rural life is slowly being erased and along with it, the small farms and communities that have characterised the landscape for so long.

With the largest human population in the world at just under 1.4 billion people in 2010 (*FAOstat 2012*) and growing, China's most important goal is to house and feed its citizens. This is compounded by the fact that as affluence increases, so does the demand for protein rich diets, particularly meat. Such demand cannot be met from backyard production, so a move to large-scale intensive farming is inevitable.

The Chinese Ministry of Agriculture (MOA) has stated that by 2015, the proportion of animals raised on intensive large-scale farms will increase by 10-15% and that those farms

would account for 50% of the total production. These 'standardised' farms would be characterised by improved productivity, treating animal waste to reach the standards for discharge or utilised as a resource, and having substantially upgraded quality and safety of animal products (*MOA 2012*).

The state has invested three billion yuan (£303 million) to support the establishment and transformation of large pig and dairy cattle farms/farming areas and it has also allocated 500 million yuan (£51 million) of specialised funds to help the farms/farmers that apply standardised farming practices by offering rewards instead of subsidies.

However, China still has to import vast amounts of soya (5.63 MT in 2012, *Baynes 2012*) and grains to feed the pigs as it does not have enough suitable land to grow what is needed and this has a significant impact on feed prices globally. Key pig producing provinces are: Hunan, Sichuan, Henan, Shandong, Hebei, Guangdong, Hubei, Guangxi and Anhui.

I detail my findings from China on the following page.



My findings in China

Production

- China has the world's largest pig population with 47.5 million sows in 2010 and growing. Most of these are still on smaller family farms with 61% of China's population engaged in agriculture (*FAOstat 2010*) but this is changing fast.
- China is expected to produce just under 52 MT of pork from 690 million pigs in 2012 (*USDA 2012*).

Strengths

- China's sheer size and the fact that it is the world's biggest producer and consumer of pork means that it has great influence over global pork production and is not yet quite self-sufficient (98%). Chinese companies are buying up land and stakes in other large corporations around the world to increase that influence and secure food and feed supply.
- The government is supporting pig production by subsidising land purchase to help people set up and expand units. They are also giving grants for farmers, particularly in co-operatives, to set up large herds of 4,500 sows or more.
- Communist rule does mean that change happens very quickly. Once the decision has been made the transformation will be completed within a matter of years rather than decades, so there is no reason to believe that the MOA plans will not come to fruition.

Key Challenges

- Producing enough food. China has big problems with pig productivity, disease and food safety that it needs to tackle before it can hope to become self-sufficient in pork.
- Plans for self-sufficiency for food are in conflict with land availability and as 10% of the land is contaminated with heavy metals it cannot be used to grow crops. Water availability is also an issue that is restricting grain production.
- Even though new genetics and technology to improve production efficiency are being used, agriculture is still labour intensive.
- China needs to house the people that are leaving rural areas as well as feed them. Flats in large blocks are being offered as an incentive to get people to give up their backyard farms.
- The one child policy is not working, affluent families can pay to have more and poorer families strive to have only boys. There are problems with an increase in the abortion rate which is leading to lack of girls to produce the next generation of Chinese people and their population is ageing!
- Pollution is now a major issue that affects most of the larger cities. Air quality is exceptionally poor which will lead to a greater demand on health services.

Major Influencers

- As a Communist country it would be easy to assume that only the government would be in a position to influence. This may well be true, but as everyone in China seems to be a government official, there are a many more opportunities to influence than you might think!
- Consumer demand for a Western lifestyle has changed the face of urban shopping. Not only is the increasingly affluent population demanding more meat, the traditional wet-markets selling 'fresh' goods are being slowly replaced by modern supermarkets with refrigeration and packaged products.



4.4 USA (Virginia and Washington DC 18th – 28th June 2011)

Arriving in America after the hot, smog-filled cities of China was like putting on a comfy pair of old slippers - it was good to be back on familiar territory.

Although only there for a short while, it was obvious after talking to a few people involved in farming that they have to deal with many of the same issues we do, albeit on a much grander scale. Welfare and environmental lobbyists who fail to understand the farming systems campaign hard, firmly setting their sights on a population that is becoming increasingly disillusioned with and disconnected from farming. Americans are still strongly patriotic however, which certainly helps and the agricultural community is fighting back to redress the balance through communication and consumer education programmes.

I visited Virginia, being the original political seat of America and home to Smithfield Foods, the largest pork processor in the US, before moving on to Washington DC, capital city and

centre of US policy making, to get a glimpse of influencing at its very best.

The pork industry in the US is long established and occupies the enviable position of being backed by influential lobby groups as well as having a solid export market into Asia. The industry itself has moved away from small family farms to large integrated supply chains that utilise contract farmers specialising in certain areas of the production chain, such as farrowing, rearing, or finishing, rather than using farrow-to-finish farms.

The sheer scale of US farms completely dwarfs that of the UK. Greater land availability and less stringent environment laws has allowed farms to expand and sites with 25,000 sows are not uncommon (the average commercial herd size in the UK is around 500 sows).

The key pig producing states in America are Iowa, North Carolina, Illinois and Minnesota although pork is commercially produced in 21 states (*NPPC 2011*).

I detail my findings in the USA on the following page.



My findings in the USA

Production

- The US is the 3rd largest pork producer in the world with 5.8 million sows (in 2010) and will produce 10.5 MT of pork from 117 million pigs in 2012.
- The US will export 2.4 MT of pork in 2012, mainly to the expanding Asian countries, providing 190,000T or 50% of the market share of pork into China (*Rabobank 2012*).

Strengths

- The established export market for agricultural products is worth around \$114 billion (£73 billion) to the US.
- Producers in the US are apparently very good at 'wrapping themselves in the flag' and appealing to patriotic consumers, so demand for US pork is still strong.
- Pork production is highly integrated, efficient and organised – companies split production stages into different states to reduce disease risk.

Key Challenges

- Financial viability of agriculture is a big issue. As a result of the recent financial crisis in America, there is great pressure to reduce direct support payments through the farm bill, even though they only account for 17% of the \$685million farm budget (most of it goes on social welfare and food stamps). America owes the Chinese \$3 trillion (£1.9 trillion).
- Opening trade lines with other countries, particularly BRIC (Brazil, Russia, India and China), has had challenges with some easier to trade with than others. Walmart failed to gain a foothold in Russia when bidding for popular retail chain X5, losing out to a local company. Getting agreement through the WTO has been particularly fraught as the US will not accept the terms offered by India and China.
- Welfare considerations have increased over the last 5 years and the National Pork Producers Council (NPPC - the industry trade association) is trying to get all farms assured so that welfare standards can be confidently demonstrated to the consumer.
- As with many countries, finding and retaining good staff is a perennial problem because the industry has image issues. Larger companies will often have good training structures in place but smaller farms suffer. The National Pork Board (US equivalent of BPEX) is trying to address the issue by forming a US Centre of Excellence for pork, offering self-training CDs and on-line training courses for all including colleges and universities.

Major Influencers

- Ruled pretty much by processors or 'packers' rather than the retailers who have little influence. The two largest are Smithfield and Tyson, who own large, integrated supply chains. Smithfield for example owns 1 million sows, equating to almost a fifth of US pork production. Most producers were reported to have a good relationship with their processor.
- Well-funded, influential farmer lobby groups such as the American Farmers Bureau (AFB), the NFU and the NPPC have very strong and beneficial relationships with the government.
- There are an equal number of single issue pressure groups, particularly welfare and environment groups. The most influential is the Humane Society of the US (HSUS).



4.5 Canada (29th June – 5th July 2011)

Like the US, Canadian pig production has changed over the years from smaller mixed family farms to large integrated and specialised operations of over 1,000 sows. Nine of the ten provinces produce pork currently, the key areas being Ontario, Quebec and Manitoba.

Over the last few years Canadian pig farmers have had a really tough time and are only just now starting to recover. A mass expansion occurred in the industry back in the late 1980s-mid 90s on the back of a favourable exchange rate between Canada and the US and things were looking very rosy. However, in 2007, a recession hit the North American market which impacted on meat consumption and the slide began. As soon as the currency shifted, the demand for Canadian pork reduced dramatically.

This was exacerbated by the US bringing in Country of Origin labelling (COOL) legislation

in 2008, which effectively stopped many imports altogether. At that time 8-9 million weaners were being sent to North America for finishing and many of these contracts were cancelled overnight. The hassle factor over labelling had caused many processors to simply stop taking Canadian finishers and weaners, leaving many Canadian producers in the lurch with no finishing facilities to speak of or market to sell into.

Since then however, the industry, albeit smaller, has reacted by finding alternative export markets to reduce reliance on one country, and is recovering.

I visited Prince Edward Island (PEI), one of the maritime states in Canada off the coast of Nova Scotia and once a pig production mecca, and also Penobsquis in New Brunswick where I was very fortunate to stay with Steve Moffett who was vice chair of the Canadian Pork Council during the crash.

On the following page I detail my findings from Canada



My findings in Canada

Production

- There were 1.3 million sows in 2012 which produced 29 million pigs yielding 1.8 MT of pork.
- The industry has had to recover from losing 20% of the production in the last five years following the currency crash and the introduction of COOL in the US, which annihilated the Canadian pig trade into North America.

Strengths

- The pork producers that are left have become flexible in order to meet future challenges and have moved away from being purely focussed on the North American market so that they now export all over the world. 40% goes to Japan, 40% to the US and the rest to about 100 other countries.
- The producers have learnt not only how to lobby their own government effectively but also how to work with the various pressure groups and retailers for the benefit of all.

Key Challenges

- Getting policies changed in Canada is very difficult because all nine pork producing provinces have to agree on the course of action before the government will listen.
- An increasing problem now is that because of the weakening US dollar, cheap imports of US pork are coming into Canada and being sold through retailers Costco and Walmart.
- Profitability is still a big issue for pig producers. Feed costs are high so many sell weaners rather than finish pigs to cut costs, resulting in competition for finishing space.

Major Influencers

- The processors, of which Olymel (a producer co-operative owned plant) and Maple Leaf foods are the biggest, control the export market and therefore have the biggest influence on pork price in Canada. Unfortunately, this has also encouraged the retailers to import cheaper meat as all the high value Canadian cuts are sold at a good price into Japan.
- Welfare lobby groups are very active but have chosen to work with the producers rather than against them, so the relationship is much more proactive and fruitful.
- As in the US, Canada benefits from strong farmer lobby groups such as the Canadian Pork Producers who have a good relationship with the government.



5.0 Who are effective influencers and how do they do it?

There are many ways of influencing but, throughout my travels, it became clear that there are several key effective methods that are used by different groups in all the countries. Ranging from overt publicity campaigns, be they negative or positive, and using the might of the unwitting public, through to much more subtle tactics, building relationships, gaining trust and respect and being in the right place at the right time. Influencers learn from each other and replicate similar techniques moulded for their own purposes, but the elements are the same for each.

In the following paragraphs, you will see the broad range of influencing techniques that I learnt about during my study with examples to show the context in which they were used plus the outcome. I have also picked out particular methods which could be of use to small lobby organisations such as mine.

5.1 Any publicity is good publicity?

People on the whole are very trusting and impressionable, and whilst these may well be very honourable traits, it also means that they are unfortunately very open to suggestion. Publicity campaigns can be therefore very effective in changing people's views about particular subjects, or creating a view where before there was no knowledge.

Unfortunately, bad news stories have a much greater long term effect on the average person, as the media and certain pressure groups know all too well, and once shocked into believing something is true, it quite often takes quite a deal of work to modify that belief.

My mum is a great example of this. She bought organic milk for years, safe in the knowledge that it was *'free of those awful hormones that they pump all the other cows full of'*. I have no issue with her buying organic, but that decision should be based on fact, not fiction.

5.1.1 Shock tactics

Whilst I was in Germany, Dr Torsten Staack from the ISN (Germany's NPA) told me that influential welfare group Deutscher Tierschutzbund was running a very effective campaign against castration in pigs which, along with posters, was accompanied by a very shocking advert shown during TV ad breaks and at cinemas in which a man is castrated – see <http://youtube/6fGDbWcgvtS> - if you dare! And also the photo on next page. Few understand what the advert is about, but this has had enough of an impact to encourage the German government to bring in a ban on castration of pigs without anaesthesia from 2017, and a total ban from 2018, as part of an EU agreement. This is significant, as Germany was seen as the last country likely to ban castration in pigs, it being the largest market in the EU and therefore the



most difficult to tackle. But DT is such a powerful group and spends 30% of its €6.5 million budget purely on these campaigns.



Deutscher Tierschutzbund 'feel like a pig' campaign against castration 2011



Pig heads used by Flemish pig farmers group Veva to demonstrate poor pork prices

PETA - People for the Ethical Treatment of Animals - had also recently run a story in the press about poor welfare, and as a result, the Ministry of Food and Agriculture of Lower Saxony developed an animal protection plan. This has huge implications for pig producers

as it includes many plans such as stopping tail docking by certain dates. ISN (Germany's NPA) were given 3 days to comment and the plan was brought in 3 days later! This kind of knee-jerk politicking is very dangerous and something we have to strive hard to prevent.

Activists however aren't the only ones using such tactics to gain publicity. Belgian pig farmers from Veva, the Flemish association of pig farmers, placed pig heads at the entrance of a warehouse of Belgian supermarket group Delhaize in Zellik, near Brussels, in protest at the decrease of prices Delhaize proposed to offer for their pork. See photo on left.

While this may have gained them some good publicity, this is certainly not the way that we would want to behave in the UK

5.1.2 Positivity rules

Other groups tend to use positive publicity campaigns to get their messages across. Whilst they may have a serious message, such campaigns are often light hearted as well as being educational. Bertha Campbell, President of the Prince Edward Island Federation of Agriculture in Canada, told me that the potato industry regularly used good case stories and feel-good news about their farmers as an effective way to influence the consumer. They found that getting farmers out to speak to officials directly about their issues was all well and good if you can find enough people willing and able to do it! The most effective way was to work with the people you need to get to, and speak to them without being too confrontational, even when things are really tough or politically difficult, and keep dialogue open.



The FARMER'S SHARE

Everyone knows that food comes from a farm.
But few people think about what the farmer receives in return.

Island farmers work hard and take enormous risks to bring you some of the safest, most nutritious, and cheapest food to the world. In return, they receive a surprising small portion of the consumer dollar.

THE MENU

French Bread with Flavoured Butter & White Bean Dip	
2 slices of bread	\$ 0.02
1/2 oz. serving of butter	\$ 0.01
2 oz. serving white beans	\$ 0.02
Grilled Pork with a Cranberry Jus	
Accompanied with Buttermilk Greens & Scotch Egg	
3 oz. serving of pork	\$ 0.17
1 egg	\$ 0.12
1 oz. serving of cranberry	\$ 0.04
Medley of Grilled Chicken & Beef Tenderloin with a Port Wine Jus	
3 oz. serving of chicken	\$ 0.11
4 oz. serving of beef	\$ 0.41
Roast Garlic Mashed Potatoes	
5 oz. serving	\$ 0.04
Island Market Vegetables	
4 oz. serving carrots, cauliflower, red pepper & broccoli	\$ 0.08
French Cream Cheesecake with a Strawberry Coulis	
Fresh Whipped Cream and a Vanilla Tulle	
2 oz. serving of strawberry	\$ 0.04
1 egg	\$ 0.12
2 oz. serving of whipped cream	\$ 0.04
5 oz. serving of cream cheese	\$ 0.10
Milk	
6 oz. serving	\$ 0.12
WHAT THE PRODUCER RECEIVES FOR THEIR PRODUCT..... \$1.44	
THE RETAIL VALUE OF THE MEAL YOU ENJOYED TODAY IS..... \$22.42	
Plus PST @ \$2.39 and GST @ \$1.56 and a \$3.36 gratuity	

Logos at the bottom include: Agriculture and Agri-Food Canada, Prince Edward Island CANADA, P.E.I. Cattleman's Association, P.E.I. Horsemen's Association, P.E.I. Women in Agriculture, Island Grains & Proteins Council, PEI Potatoes, and various other agricultural organization logos.

Canadian farm industry campaign highlighting the price paid to the farmer

The Canadians had also developed a very innovative campaign to show the consumer how value is apportioned through the food

chain and understand why the farmer often complains about lack of profitability.



If you can pitch it right, and there is sufficient media interest, you can get a simple message heard and understood by thousands of consumers. Getting producers to turn out in their droves like this, however, is a struggle, particularly if what you are trying to campaign for isn't affecting people directly.

5.2 People power

5.2.1 The rise of Clicktivism and use of social media

One method of influencing that has seen a meteoric rise in popularity over the last few years has been through the use of social networking websites. Sites such as Twitter, Facebook and You-tube enable almost anyone to make messages and stories public, and have the potential to reach a global audience in a relatively short space of time.

Technology has also made it very easy for people to give support to, or object to something. Simply through the click of a button, hundreds of thousands of people can publicly share their opinion on a topic, even if it is something that they know little about, and by so doing have more influence. Pressure groups can raise a whole army of armchair lobbyists who are primed and ready to act, especially as little is actually expected of them in terms of time or effort.

38 Degrees is a group that is currently doing just that. So called because 38 degrees is the angle at which an avalanche happens, this on-line lobby group was launched in 2009 and now has over 800,000 members. Lobbying on

a vast array of topics from government support for badger culling to control TB, to Donald Trump's plans to build a golf course, the more cynical amongst us might say that they are just lobbying to get publicity and more donations rather than really caring about what it is they are trying to prevent.

Petitions and form letters (which are letters pre-written by the organising pressure group so all the concerned member of the public has to do is hit 'send') have in the past been used to lobby MPs and MEPs who have a duty of care to take notice, although now they are starting to lose their appeal. MEP Vicky Ford told me that form letters are often taken less seriously because they are all identical and the obvious lack of effort involved reflects the importance of the issue to the sender.

Of course the sheer number of people involved does impact on the decision as to whether any action should be taken. European welfare lobby groups have for example successfully gained a review of livestock transport hours by collecting over a million signatures from the public and presenting a petition to the Commission.

With little understanding of how livestock behave on long journeys the public are asking for the maximum journey time to be limited to 8 hours. No-one is sure where the 8 hour figure came from, but it was most likely to fit in with driver hours rather than any welfare consideration for the animals. With pigs for example, the most stressful part of the journey is loading and un-loading – as long as they have access to food and water, they can be transported for well over 24 hours quite



happily. This is yet another example where the public is being misled into acting on something that for the pig certainly will give no benefit, but will make things really tough for the industry, particularly for those living in out of the way places with no alternative.

The use of social media to encourage action and engender change was given the term 'clicktivism' by Adbusters editor Micah White in 2010 and he remains unconvinced that it will be an effective tool when compared to traditional activism. He suggested that *"a few banal pronouncements about 'democracy in action' coupled with an online petition will not usher in social transformation. Clicktivism reinforces the fear of standing out from the crowd and taking a strong position. It discourages calling for drastic action. And as such, clicktivism will never breed social revolution"*.

5.2.2 Straight from the horse's mouth

Direct action therefore remains one of the most effective influencing methods.

Politicians, civil servants and consumers alike are much more likely to empathise with and listen to someone who is directly affected, and the American Farm Bureau (AFB) is by far the most adept at using this tool.

The organisation has 6.2 million members across the US and has impressive influence within Washington, mainly because of the sheer number of Americans that it represents. Utilising farmer members as much as possible, AFB Senior Director of Congressional Relations, David Salmonsens, told me that they bring people directly in to meet with politicians,

congressmen and state representatives, properly briefing them on the issues and the lines to take but also providing briefing for the Capitol staff members.

Getting farmers to come in and represent themselves is a challenge, however, but the organisation still manages to host 4-5,000 visitors a year and co-ordinate regional activity as every state in the US has an AFB office. The Farm Bill in America is the document which dictates the policy and support that farmers will be able to access over the next 10 year period. Drawn up by Congress, and not the administration, lobbyists have to engage with the congressmen directly and influence them. Obviously the most effective way to do that is through the latter's voters, and so farmers are identified in specific counties to target well placed congressmen and encouraged to meet with them individually to put certain cases forward.

New Zealand agriculture attaché in Washington, Terry Meikle, said that he often brings farm leaders over to the US to state their case more clearly and also so that they can see how the political process works. Bringing farmers over to deliver the messages often shows the policy makers the exact impact that their decisions will have on the New Zealand producer, and as an exporting nation this is important as maintaining trade with the US remains a priority.

5.2.3 Big brother is watching

People power may be a very effective tool to engender change but, in some countries, it is power over the people which has more impact.



The Chinese government certainly wins the award for the ultimate mass influencer and I saw plenty of evidence on my travels. The people, especially those from rural communities, are very proud of who they are, their history and their leaders, so much so that you can almost hear the mantra taught to them throughout their schooling. One of the translators said that Chinese people were too clever to run their own country so it was better for the government to decide how to. She said if there was democracy the country would fall apart, because the Chinese are so entrepreneurial that they would never be able to agree on anything. She likened them to little chicks – all grabbing for the corn at the same time.

In Russia again it is the rural population that are by far the most patriotic compared to cosmopolitan city dwellers, who are hungry for power, change and Western lifestyles.

It is in the cities such as Moscow where the divergence is most obvious. Whilst I was there, the local Moscow Times was reporting that, in an attempt to avert any anti-government protests which have been increasingly popular of late because of the recent elections, ‘gatherings’ were about to be outlawed in time for the country’s ‘Russia Day’ on the 12th of June.

Out in the countryside, however, people talk proudly of their history and their leaders and generally tend to keep their heads down. Only those who attempt to challenge the status quo or start to become overtly political will get noticed, as many foreign companies attempting to invest in Russia’s agriculture industry have discovered to their peril.

5.3 Plugging the knowledge gap

Everywhere I went, farmers talked of the increasing disconnect between the consumer and food production, and how pressure groups often exploit that fact. Apart from in China and Russia where food safety is the key driver for the consumer (they are not interested in *how* their food is produced, only that it is nutritious and will not make them sick if they eat it!), most countries are starting to recognise that this is an issue and many are now beginning to bridge the knowledge gap and are using social media to do it.

Mike Dunlap, agriculture sub-committee staff director in the House of Representatives, told me that the diversity of farming in the US is increasing, with many more smallholders and hobby farmers. People still want food on the shelf but don’t understand how it gets there. Community Supported Agriculture and farmers’ markets help with this but there is still a need to educate. Most Americans are now three or four generations away from the farm, but people still want the connection which is why so many backyard farms exist.

The US Farmers and Ranchers Alliance is already trying to tackle this issue with a website aimed at the general public seeking to educate those that are interested in how their food is produced and using a variety of media from YouTube videos, blogs and a twitter feed - <http://usfraonline.org/>

I asked Matt Conrad, Assistant Secretary for Agriculture and Fisheries in Virginia, how the farmers were able to remain profitable even with the onslaught of public pressure for an



improved environment and welfare. He said Virginian farmers were very good at selling their product on the whole 'local' concept (wrapping themselves in the flag) and in general the consumers were very patriotic and supportive of agriculture. In his view, the importance of people power was paramount and the Americans are not the only ones who have cottoned on to this idea.

Members of the Dutch farmers' association ZLTO told me of their 'open barn' concept where people can visit farms free of charge whenever they want. Seventy farms currently do this in the Netherlands and 'sky box' viewing windows - that look into the farm in order to maintain good biosecurity and reduce disease risk - are used. ZLTO Board member Maarten Rooijackers had had 15,000 visitors since opening up his farm (including many school visits) and a book is available so that people can leave comments if they wish.

The Germans also support communication activities such as the 'clip my farm' initiative where farmers video what they do to show the public not only how their farm works but also that they are "normal" people too. For them, the USP is the family farm and the ISN plan to use this to sell the product rather than the pig and how it is raised. They believe that shifting the focus from pigs to people will be more effective than trying to continually defend farming techniques.

In Lithuania, processor Krekenavos has an interactive website where the public can take a virtual tour of one of their slaughter plants and processing halls. Your tour guide talks you through what happens in each area and in

certain areas you can click to see a video clip of what exactly happens there -

<http://krekenavos.lt/ekskursija/index.php>.

The whole idea is to remove, for those that are interested, the mystery of what goes on within an abattoir and to stimulate debate and interest in the local community. Doing this has gained the processor much needed local support.

See virtual tour of a slaughter house on page 35

5.4 Playing the long game

5.4.1 Building relationships

Gaining trust and respect from policy makers and those with power does take a lot of time, but is probably the most effective influencing tool that there is. Every lobby group worth its salt will try and get a foot in the door somewhere, be it with government, retailers or politicians, in an attempt to exert some kind of control.

However, although the importance of developing and nurturing relationships with those that have influence is well known, not everyone is able to do it effectively. Stewart Houston, who is the executive Director of NPA and chairman of BPEX, is a master of this and I have been very lucky to observe him on many occasions. Over the years he has put a lot of time and effort into developing effective relationships with people that can benefit the industry (and spending half his life at the



Farmers Club!), and for him it is a lifestyle rather than just a day job.

I think the reason that he is able to get so close to people is because he knows his stuff, gives good advice and people like him. Honest, positive and amiable, but able to deliver difficult messages without being overly aggressive, Stewart is very influential and a real asset to the pig industry. This is why to all intents and purposes, within Defra for example, Stewart *is* the pig industry. It is also a talent that takes time to develop and he says himself that it has taken him years to get better at it.

Relationship building can be much more difficult however when you operate across several countries. David Paterson, Head of Regional Affairs for ASDA, told me that long term relationships with policy colleagues were made much more difficult by devolution and localism. Adding tiers of government like this adds complexity, which adds cost. Whilst ASDA are very supportive of power to the people - for they trust their customers - it becomes more difficult to manage it across the 500 or so stores that they own and a much bigger draw on resource.

Retail is an area where developing relationships is crucial if you want to succeed. Consumers are all about the offer, and if companies don't take time to understand what customers want they will simply go somewhere that will.

Whilst in Russia, I was very fortunate to meet with Avril Conroy who has just taken over as Head of Retail and Wholesale at TNK-BP, and

was recently COO for Walmart in Russia – this was one amazingly inspirational woman. She said that many retailers had been unsuccessful in Russia simply because they didn't take the time to understand the Russian consumer. Carrefour, the world's largest retailer, was a recent example. They provided a standard store format, filled it with standard goods (who would want to play outdoor games in the middle of a Russian winter?) and lost a lot of money before pulling out. Others however have been much more successful. French retailer Auchan, and German retailer Metro, have thrived because they give consumers what they want when they want it: good price, good quality and everything you could possibly want under one roof. Connections (and money) are essential for foreign companies looking to set up in Russia.

Pig genetics company PIC is another great example of a foreign company that has thrived in Russia because of the relationships that they have built and the attitude that they took. General Manager in Russia, Nick Brookes, told me that their success is largely down to the fact that the company has grown organically within the country. They have integrated their lives and families into Russian culture, learnt the language and become part of the landscape.

This has enabled them to develop good working relationships with companies like Miratorg, the largest pig company, and they have recently set up a pig nucleus herd in Russia to supply Miratorg so that they don't have to bring in pigs from other countries and risk disease incursion.



5.4.2 They work for you...

Politicians the world over will support your cause if they have a personal connection to it or if they think it will win them votes/get them noticed/be financially beneficial: possibly a cynical view, but there it is. In the main, however, politicians can be a useful route through which to exert influence. Every one of us has the right to vote and the right to choose who we wish to represent us, but as an industry, I'm not convinced that we utilise our MPs and MEPs as well as we could.

In America, the Assistant United States Trade Representative in Agricultural Affairs, Sharon Bomer-Lauritsen, told us that organisations looking to influence will first develop specific proposals with their members, before meeting senior bureaucrats from relevant agencies and asking them to get involved where the area is within their remit. Such organisations will always start with senior civil servants, as administrations are prone to change, and begin to build on the issue by bringing in their own members and CEOs to sit with the Secretary of Agriculture and raise the importance of the issue.

If this fails, they will go to a congress member or committee member, often those on the other side of the house (the Opposition) as they are often more keen to take on the fight. Farmers are a much more effective tool to influence government than huge companies like Monsanto for example, as governors and state legislators are more likely to reach out and listen to individual farmers and growers with a personal story to tell.

The Humane Society in the US (HSUS) has been able to make politicians work for them in a most impressive way. Randy Spronk, Vice President of the National Pig Producers Council (NPPC) in America told me that HSUS began a campaign in 2002 to ban the use of sow stalls across America. Failing to make an impression at Congress level in Washington as they were no match for the powerful farmer lobby groups, they switched tactics and began a state by state campaign instead.

Firstly they targeted states where there were very few pig farms - such as Florida - and enlisted the support of key politicians to help with their plight. Certain states, like Florida, have a ballot initiative where if a proposal gets enough signatures, a referendum can be forced, which goes to the public vote. This, combined with a targeted campaign achieved the desired result and in 2002, Florida banned the use of sow stalls (on the two pig farms that Florida had!).

Subsequently using links to sympathetic politicians they led successful bills and ballots to achieve bans in Arizona (2006), Oregon (2007), Colorado and California (2008), Maine and Michigan (2009) and, in 2010, they reached agreement with the Ohio Farm Bureau to lobby for new animal protection rules, leading to the adoption of regulations outlawing sow stalls in Ohio which is a not insignificant producer of pork. The more states that they can convince to bring in the ban, the more influencing power they have in Washington, which has been their ultimate goal all along.



In addition to this, the HSUS began working on large processors, notably Smithfield who committed to change the systems in its supply chain by 2017; fast food providers such as McDonalds, Burger King and Wendy's; large food producers like Unilever and Heinz, and food service companies such as the Compass Group. In several cases, an exposé on farm followed commitment by the company involved and others most certainly came into line for fear of risking their corporate image should they be found with similar suppliers.

However, the NPPC is concerned that many of these companies may be making promises that they cannot keep as a recent survey showed that only 17% of sows in the US are in stall-free systems.

Nevertheless, in just ten years, the HSUS has brought about massive change in the US legislation, and although many farmers saw the writing on the wall a long time ago, I'm not sure they ever thought that HSUS would be quite so successful. This is a very good example of how one group used local politicians to achieve their goal.

5.4.3 Evidence and advice

One of the most important tools that the lobbyist needs is the ability to provide robust evidence and to deliver succinct advice. Anyone can ask for change, but if there is no good reason behind the need for that change, you are unlikely to be successful.

Many groups will attempt to gain favour by promoting themselves as the leading source of information in a particular area. Welfare

collective 'Eurogroup for Animals' have somehow managed to convince EU retailers to give them a consultancy on how they can change production systems to become more sustainable. This is amazing seeing that their stated objective has nothing to do with sustainability and everything to do with introducing more stringent welfare requirements.

The European Food Safety Authority (EFSA) is a hugely influential group and one that many, as a result, will try to become part of, which means it has been beset by problems. EFSA working groups exist for various policy areas to provide evidence reports for the Commission that often become the basis of new legislation. Therefore getting onto the working groups or connecting with people that are on them can be very useful for those wishing to influence.

However, the groups are apparently quite elitist and membership of some is reported to be determined by the chairperson even though all members are supposed to be independently elected by the council. This has often resulted in calls for investigation over conflict-of-interest concerns of the individuals on the groups.

Only recently Chair of the EFSA Management Board, Diána Bánáti, handed in her resignation after EFSA officials stated that her new professional position as Executive Director of the International Life Sciences Institute Europe (ILSI) was 'not compatible' with her role as EFSA Chair.

The Authority has long been criticised by environmental groups, the European Parliament and others for employing board members with 'conflicts of interest', for



example in the field of GMOs. MEPs also refused to sign off EFSA's 2010 accounts because of alleged 'conflict of interest' issues.

Even in countries where outwardly there would appear to be little opportunity to influence, such as China, the government still has committees and still needs strategic advice in order to plan for the future.

Mr Wu, Chairman of the Guangdong Pig Association in China, told me that although the Association is government owned so the staff are more like government officials, they do influence policy making over the longer term, by collecting views and information from their members and feeding this into the various policy groups that set the targets for the 5 year agriculture plan.

5.4.4 Timing is everything

Particularly in politics, timing is very important for the average lobbyist. A badly timed campaign can waste a lot of time and resource and lead to very little result. David Salmonsén from the American Farm Bureau said that it was especially effective when members visited their congressmen and senators in their home constituency around the elections. The House of Representatives has elections every 2 years and the Senate every 6, so campaigns are targeted accordingly.

The AFB's power with the various White House committees also varies depending on the election stage. Early after an election, the doors are open and members are in listening mode, but there is a relatively short window of opportunity in which to influence before the

doors close, so campaigns must be on the ball.

In Brussels, environmental consumer groups and welfare groups are very good at having influence at the beginning of the legislative process and they plan much further in advance than we currently do. Every piece of legislation has a scheduled review date built into it to ensure democratic accountability and these groups are very good at watching for them.

Ahead of a review on specific parts of legislation, they will build up their evidence base, influence those on expert groups, hold networking events and plan their strategy to achieve the desired outcome. This is relatively simple as a concept, but something that we regularly fail to do, more often having to deal with the legislation once it reaches our government for transposition into national legislation, and by which time it is far too late to make any significant change.

5.4.5 Solutions not problems

Lobby groups will always have more success with those they seek to influence if they provide a workable solution to any given issue. One such example I found particularly inspirational, not least because the solution came from an industry sector that was on its knees and could quite as easily have given up rather than come back fighting, was from the Canadians. In 2008 following years of hard lobbying from US farming groups looking for a US label and a price premium, Country of Origin Labelling (COOL) was adopted in America. COOL was not consumer or food safety driven, and the way that the legislation



was brought in and enacted cost many Canadian farmers their livelihoods without really achieving any benefit for US agriculture. 90% of the fresh meat was already supplied by the US, so there was no price premium to be had, and COOL only applied to fresh pork so bacon could still be traded freely.

This, as an aside, is therefore a really good example of a very poorly thought out campaign that probably cost a significant amount in terms of resource and hard cash but achieved absolutely nothing.

Meanwhile, the cost involved in changing pack labels on fresh pork to declare Canadian origin, caused many processors to simply cancel contracts with Canadian suppliers overnight, leaving many of the latter in the lurch with no finishing facilities to speak of or market to sell into.

Steve Moffett, a pig producer who supplied pigs into North America, was vice president of the Canadian Pork Council (CPC) at the time. He told me of their simple yet positive approach following the impact of COOL. The industry was already in a bad way because of an unfavourable currency shift, but had agreed that asking for hand-outs was not the way forward due to trade sensitivity issues with the export market. Thinking positively, they decided to provide a solution and ask the government for a loan to tide them over until prices started to increase again. Although the government agreed it was a good idea, they initially turned the CPC down. Undeterred, the CPC asked members to lobby local MPs and provincial governments, who brought the issue to the House of Commons Agriculture

Committee where a presentation could be made. Alongside this, the farmers generated interest from the media with their stories and sent out press releases in order to gain public support. This was an unusual move for the farmers as they would normally not publicly promote their issues. With the campaign in full swing, they were able to get support from all four of the political parties (Conservatives, Liberal, the New Democratic Party and Bloc Québécois). The proposal was put to the House of Commons and passed within 2 days.

Several months' work had gone into the campaign, but a positive result was secured in the end which was to save the Canadian pig industry.

5.5 Money talks

5.5.1 Power through trade

US beef imports to the EU are currently restricted because growth hormones are still used, and these are banned in the EU. Agricultural Affairs Counsellor for the EU delegation in America, Dan Rotenberg, explained that as this is seen as a trade barrier, the US has retaliated by imposing €120 million worth of trade sanctions onto the EU because of BSE. Even though the EU and US have the same risk classification grade for BSE, the US continues to ban imports of beef from the EU on the basis of BSE risk, which is completely unjustified.

The US is also going to other countries such as China and Japan and telling them to accept US beef as safe - whilst trade restrictions are



still in place for EU beef and there is no difference between the two! All because we wouldn't accept US beef into the EU because they use too many hormones! As a compromise, the EU created a derogation for non-hormone treated beef to allow it to be imported from the US.

Another country that uses trade to exert influence is Russia. In the past, this has been very easy for Russia who regularly opens and closes borders for all manner of reasons and by doing so creates havoc elsewhere – just look at what happened when they banned grain exports in 2010 and the price of wheat rocketed.

But now Russia has a bigger challenge. In order to continue to gain global prestige and respect, Russia has asked to join the WTO and hopes to accede in August 2012. However, as part of the deal, import quotas and tariffs on goods coming into the country must be removed. Ian Wiggins, Second Secretary of Trade for the British Embassy in Russia, told me that there was going to be a huge fight over agricultural products after accession, mainly over issues to do with quota and health measures. Russia has pledged to spend 8 billion roubles (£160 million) on supporting agriculture and therefore it is likely that they will protect their market by any means possible.

In fact Dr Yury Kovalev, Director General of the National Union of Swine Breeders in Russia, stated at the European Pig Producers Congress in Lithuania that whilst Russia would accept the rules of the WTO, they would use every legitimate measure available for the

protection of their markets. Alberto Volpato, Agricultural Counsellor from the EU delegation in Russia, predicted that there would continue to be resistance to importing product. The systematic delisting of specific export plants because of various health concerns is a common method that is used to disrupt trade flows (e.g. they have set a lower level than the EU for antibiotic residues in imported meat) and one that is likely to continue.

5.5.2 Buy your way in

Pressure groups can also effect change through buying themselves a piece of the action. In America, as part of its efforts to encourage CKE Restaurants, operator of the Hardee's and Carl's Jr. restaurant chains, to improve the treatment of animals in its supply chain, the HSUS purchased stock in the chains' parent company, Apollo Global Management (NYSE: APO). They intend to use their stockholder position to help motivate CKE to move away from purchasing eggs from caged hens and pork from systems that confine breeding pigs in stalls.

China has been buying up land and putting in infrastructure in several countries, mainly Africa, South East Asia and even some in Australia (*Anseeuw et al 2011*). Whilst in the past this has been mainly about mineral deposits it is now becoming more about buying land to grow crops for food and biofuels.

Kenneth Peoples, a consultant that I met in America who specialises in seeking opportunities for foreign investors and is Chairman of the Peoples Group Ltd, told me that China had already bought around 10-15



sugar plantations in Africa, of around 10-15,000 acres each, for ethanol. China does large comprehensive deals although sometimes they are rejected because, when they get a deal, they bring around 150,000 Chinese workers with them who simply don't fit in to the local community. They do however put in infrastructure (roads, rail etc.) and bring plenty of money which is obviously welcomed.

China is not content to stop at merely protecting future food supplies, but is buying into large influential companies too. Whilst I was in China, the China National Cereals, Oils and Foodstuffs Corporation (COFCO), one of China's state-owned foodstuff and export holding companies, had just bought a 5% share in Smithfield, the world's largest processor. All bets are on as to what they plan to do with that!

5.5.3 Welcome to the dark side

One of the more delicate areas to discuss is corruption, but it *is* an issue and not one that I feel I can ignore. Let's not kid ourselves, dodgy deals go on all over the world, but in some countries it is more transparent than others and some seem to have more of an issue controlling it.

Corruption has been a problem in Russia since the dissolution of the Soviet Union in the early 1990s, so much so that Russia has been ranked by Transparency International as 143rd out of 183 countries according to perceived levels of public sector corruption – the UK by comparison is 16th (TI 2011). Alberto Volpato, agricultural counsellor from the EU delegation

in Russia explained that the current political system does not help reduce corruption.

Poorly paid public officials are responsible for overseeing a system of permits for everything that just begs to be abused and this is compounded by the large amount of money circulating in the country. There is no real public judiciary in law and a political system that operates without the normal democratic checks and balances. When you add that to the fact that the media is still fairly controlled, there is no real way to expose what is going on. Those that do reap the consequences.

The Magnitsky case was quoted as an example. Sergei Magnitsky was a lawyer employed by a Western investment fund who exposed interior ministry officials for bribery. Not only was he thrown in prison by the very people he had accused, he subsequently died there shortly after, and this has served as a dire warning to many potential investors ever since. It is starting to change however, as there have been some moves to tackle the issue, although there is no real strategy as yet. The current (political) opposition leader is seen as anti-corruption who could do good things, but first of course he would have to get elected.

Lobbying in Washington is protected by law, so direct donations aren't allowed. However, companies find other ways to buy politicians, often furnishing them with tickets to fund-raisers and other high-brow events which are called 'packs'.

Simon Smalley, the Australian Agricultural Trade Attaché in the US, gave the sugar



industry as an example of where financial incentives were used in order to stem the flow of sugar to the US from Australia. In return for political support the big American companies paid off congressmen who wanted to be re-elected.

Even though the sugar market in the US is controlled, which means there is no competition for subsidies as theirs are set and protected, imports pull their retail prices down. Sugar markets all over the world are protected as it is an important commodity to the consumer. This protection however doesn't benefit the consumer as it artificially inflates the price.

5.6 Bring in the professionals

Those that can afford to do so will often use professional lobbyists to fight their corner for them. These companies are set up to provide the complete service, from advice provision and evidence gathering, to political representation and negotiation. Many will have operated in specific markets for years, and therefore have the connections and established relationships that newcomers to the scene will lack.

I went to meet with Katie LaZelle, a senior consultant at Weber Shandwick (WS) in Brussels. WS describe themselves as the eyes and ears of their clients in Brussels, but they also look for opportunities to inform and serve potential new clients. They provide a window on the world of the 'Brussels bubble', keeping an eye on movements within the Commission, especially the trade regime, which could have big financial impacts for their

clients. She described Brussels as like a big ocean liner - once it is on a track it is very difficult and takes a long time to change that course so it is important to influence at an early stage.

Katie gave me a good example of the tactics that their company would employ in a typical case. Recently an infant formula company client of WS was affected by a smear campaign that was designed to discredit a health claim made in one of their products. The formula contained DHA which, being rich in omega 3, is good for brain and eye development and had an EFSA health approval certificate. However, the 'breast milk activists' who were opposed to the use of formula milk encouraged concerned consumers to send form letters to influential people who could speak up against the claim. MEPs that were lobbied successfully took advantage of the fact that EFSA had recently been under the spotlight for using experts with potential conflicts of interest as they worked for large food companies, and promulgated a general distrust of EFSA.

WS used direct outreach to the MEPs, taking evidence to support the EFSA approved health claim. They tracked down MEPs that would support the issues, including those who were strong on women's rights (or had a partner who was, as the majority are male), and would be more interested in allowing women to get back to work after giving birth. They also, in this instance, co-ordinated efforts with the European Commission who were fearful for the result and how it would reflect on EFSA and their reputation.



The Commission helped by putting in a letter of support for the EFSA health claim approval which was sent to MEPs. The activists lobbied sympathetic MEPs to put in a parliamentary resolution, which was then passed to a plenary vote.

By this time, there was plenty of publicity around the resolution which made more MEPs jump on the bandwagon to show that they had an opinion, rather than keep quiet, whichever way the vote went. In the end, and following intense lobbying on both sides, European Members of Parliament voted not to block the approval of the claim, so WS were successful.

Not everyone will engage with professional lobbyists however and certainly not in Brussels, where in Katie's opinion, trade associations and industry groups are the most influential groups, purely because of the number of people that they represent.

Activists and single issue pressure groups don't get any more airtime than the trade associations, although they are often overly emotive which unfortunately will sway some MEPs.

5.7 Co-operate and collaborate

Co-operation is rarely considered to be negative and, for a small lobby organisation, it is crucial in order to amplify both the importance and the distribution of the message. Eurogroup for Animals has taken this to the next level and represents 40 welfare lobby groups mainly across the EU. Since its formation 30 years ago, Eurogroup has taken many new fledgling welfare groups under its

wing and achieved much for animal welfare, and not just at EU level.

They even take credit for convincing the EU to include a legal obligation under the EU Treaty to consider animals as sentient beings when drafting legislation, which has had a significant impact on welfare policy.

Michel Courat, policy advisor for farm animals, pointed me towards their website, where they have a whole host of hints and tips on how to lobby more effectively in Brussels, from identifying your 'lobby target' to how to interact with them. There is no doubt that, as a collective, these individual groups have achieved much more in a co-ordinated way than they would have by acting alone. NGOs are collaborating across the world on all sorts of issues but particularly welfare, and producers need to do the same.

Aside from groups with similar interests, it can also be beneficial to work with those that have opposing interests too. Dr Torsten Staack from German pig industry association ISN said it was important to work with welfare lobby groups and have open and frank discussion with them however challenging, but we know ourselves that this is not always possible, particularly when they continue to promote negative press around your industry! But it can work sometimes as was seen in the US.

At an International welfare meeting in Brussels I had the opportunity to meet with Kate Barger who is Director of World Animal Welfare for poultry company Cobb-Vantress International. She told me that after the debacle with sow stalls, the US poultry industry committed to



working with the HSUS who had begun to use the same state-by-state tactic to ban battery cages as they had done with sow stalls. By working with them, HSUS have agreed to stop their action and will look at how to bring about the end of battery cage use more strategically. This has certainly bought the poultry industry more time to prepare and to have more control over when any ban would come into effect.

Canada also has a strong welfare lobby and farmers work with groups where they can. Vice Chair of the Canadian Pork Council, Steve Moffett, told me that they had recently

set up a committee which included farmers, vets and Canada's humane society to draw up standard operating procedures for pig production. The Canadians prefer an inclusive approach to policy making and, whilst this is a very slow process, it allows everyone to understand the issues and take responsibility for resolving them. They are also developing an animal care assessment tool which includes guidelines on food safety, record keeping and veterinary medicine use. The plan is to make it a mandatory part of the Canadian quality assurance scheme in 2012

The picture below refers to text on page 25



The virtual tour of a slaughter plant – aimed at educating the consumer and dispelling myths.



6.0 Making a small lobby organisation more effective

From the vast array of influencing techniques that I saw in action, there are plenty that a small organisation can employ which are relatively low resource. Many of the techniques are not particularly new, but there are some that can certainly be used to better effect, and there are many lessons to be learnt from those that have gone before. The most effective methods in my opinion are discussed briefly below.

Publicity campaigns can be very successful for raising awareness quickly but can be expensive and it is often difficult to gauge how much of an impact the message has had on the general populace.

The NFU “SOS” dairy campaign provides an excellent example of how quickly farmers can be mobilised to make a point if there is something worth shouting about. Barely a week after milk processors signalled another drop in liquid milk prices some 2,500 farmers turned out in London to show unified dismay across the dairy industry.

The NPA has also used positive publicity campaigning to good effect on several occasions, even roping in the 2011 Scholars to our London rally that March to highlight the poor price paid to farmers for their pork, although we almost got Nuffield Director John Stones arrested at HSBC HQ for carrying one of our placards!

The problem for us is that an increasing number of pig farmers in the UK now contract-farm to reduce risk to their business. As they no

longer own the pigs, the financial losses aren't felt as keenly by the contractor. The national herd is in the hands of fewer and fewer people which makes future mass demonstrations outside Parliament increasingly unlikely, so we must find other more effective ways to spread our messages.

Some areas, such as the use of social networking, have proved a popular communication tool for welfare lobby groups, but are still relatively in their infancy as far as farming is concerned and need to be explored further. Farmers will use it mainly to promote a niche market product, communicate with each other, and to spread word through the media, but as yet, and certainly in our sector, it has not been used to promote co-ordinated positive messaging about commercial farming to the general public.

Others have been much more effective at influencing the public because we seem to spend an inordinate amount of the time dispelling myths about modern pig farming. Time however is something we have precious little of, so we must use what we have more effectively.

Poorly defined emotive terms such as ‘factory’, ‘mega’ or even ‘giga’ farms have become ubiquitous although most people have little understanding of what they actually mean, along with the belief that all modern indoor farms are bad and run by profit-hungry monsters who care little about the animals within them. This negative image is already having an impact on our industry, not only



through people shunning pork, but on succession, making it difficult to attract new people into the sector. Since this is a cross sector issue however, the solution lies in collaboration, which really is an effective way for small groups to have a bigger impact. The various UK farming groups do have relatively good relationships already, but there is still plenty of work to do before we can provide a truly united front.

Many issues are not confined to these shores, particularly as legislation is often EU derived, so collaborating with similar groups in other countries should be considered. Whilst we already have COPA (the Committee of Professional Agricultural Organisations) representing our interests in Brussels, there are many issues on which the entire membership (96 organisations) does not agree, although it is a useful platform for forming smaller alliances.

There are many opportunities here that should be explored, particularly where certain groups or country representatives have better contacts in government or other organisations that can be utilised. Not only can you amplify your message by working together, you can increase the influence that you have over a wider area.

Long term relationships with other groups or influential people are worth developing and spending time to maintain. The nature of many roles does mean that people are often moved on after a relatively short space of time, and this is especially true for politicians, civil servants and retail buyers, but the effort is often worth it - particularly as you never know where these people will turn up in the future!

Identify the future rising stars in your industry (these are generally people who prefer action over words) and show them why they should spend time getting to know you. If you approach people with a positive attitude to a problem, bring solutions to the table and speak from experience, you are much more likely to be successful in the long term. Not exactly rocket science, but I have been surprised to see how bad people can be at doing this, preferring conflict and force to get their way.

Politicians also have multiple issues and responsibilities, so it is important to ensure that you keep them briefed on any key issues, particularly those in which they have a vested interest. Keep your own members well briefed and encourage them to speak more regularly with their local MP or MEP. Many will already have good relationships with the politicians so this can be a really effective mechanism to spread your own messages and the politicians are much more likely to listen to someone in their own constituency, particularly around election time.

Finally, and I think this is the most difficult to achieve but also most important, whatever lobbying technique is employed, any group, but especially those with limited resource, needs to have focus. Lobbying in itself can be very effective but achieve absolutely nothing, wasting time and precious resource. You need to think very carefully before embarking on a campaign as to whether it will deliver what you need it to. Communicate regularly with your members to find out what their issues are and develop a strategy with time limited targets and actions. Although time targets need to remain flexible to deal with



unexpected issues, allow your members to have a part in its development and review. Regularly remind yourself who it is you are

working for and why, before determining how you can best serve them.



7.0 Conclusions and recommendations

7.1 People power is king.

The more people that you can get saying the same message the quicker it will become one worth listening to. Smaller lobby groups should cascade their messages through as many people as possible, members, consumers, MPs and MEPs alike, to amplify and give weight to what they are trying to say. Form alliances with similar organisations where possible and in different countries, identifying common areas for concerted lobbying activity.

7.2 Plug the knowledge gap.

Lobby groups often use lack of knowledge to their advantage so it is vital that we provide evidence-based information that is honest, easy to understand and unbiased, in order to allow people to make a balanced and informed decisions. Social media, myth busting websites and video footage can and should be used to our advantage.

7.3 Take time to develop relationships with key influencers.

This can be hugely effective and stand you in good stead with those you seek to influence. Choose the person or organisation wisely, learn about them, their language and culture. Give sensible advice, prove your worth and gain trust. You are much more likely to succeed if you approach people with solutions and be constructive rather than simply raising issues and expecting others to solve them for you.

7.4 Focus people!

It is easy to lose your way and get caught up fighting for something that will bring you no benefit or that you have no hope of winning and for small lobby groups, this can be disastrous. Pick your battles, understand your target audience and evaluate the expected outcome before jumping headlong into a campaign. Be aware of unintended consequences. Plan ahead as far as you can for key challenges that you know you will face over the next few years but remain flexible enough to react to new issues as they arise.



8.0 Life after my Nuffield Farming Scholarship

My Scholarship has positively impacted on my life in many ways both in business and personally. The first thing that it taught me was that the world is not such a scary place after all and that taxi drivers are the same thieving scallywags wherever you go!

Most notably, it gave me the confidence to explore outside my normal comfort zone. In New Zealand, I disappeared during the Contemporary Scholars Conference to visit Steve Stearns's 4,000 sow outdoor unit. This was very out of character for me, not only doing something other than what had been planned, but also calling a strange person out of the blue to see if I could go visit.

I took another opportunity by going on the Global Focus Tour, which brought me into contact with so many inspirational people who taught me much about lobbying, their culture and global pork production. It was certainly worthwhile, even sharing my life with four Australians and a mad Irishwoman for seven weeks! Not only was I bitten by the travel bug, eagerly planning my next trip weeks after returning from the last, my mind was permanently switched onto Nuffield mode. Every person I met with was probed for interesting information to squirrel away, meetings with officials became Nuffield interviews and conferences became discussion arenas. No more hanging around the biscuit tray for me, trying to blend into the background! I certainly feel I have benefited personally and this has also had a positive impact on the business side too.

Whilst I was somewhere in China, I took over as the General Manager of the NPA. It wasn't a complete surprise as I had already secured the job before leaving, but it was a whole new level of responsibility for me. Two completely new members of staff were starting and I now had a great opportunity to make the Association stronger and better prepared for the future.

One of the first things that I decided to do upon my return was to learn from my own recent experience and develop a five year plan for the NPA to provide focus for our activities going forward. We have also recently begun a top to bottom review of what the NPA does and how, inviting thoughts from our membership to form the basis of the plan. I have also begun raising the profile of the organisation as a separate identity by producing a welcome pack, publicity material and leaflet to explain what it is we do for the industry.

I've used other lobbying means more effectively too. For me, our weak point was Brussels. So many decisions are taken here that will ultimately impact on our members so it is important to maintain a strong presence here and have an input. Whilst we are very lucky to have the British Agriculture Bureau keeping an eye on everything, I did not feel that the NPA were being as proactive as we could be. The sow stall ban that comes into effect across the EU from the 1st January 2013 provided us with the perfect opportunity to change that and we have been very busy. Engagement with MEPs has ramped up significantly, I'm writing briefings and press



releases for circulation to raise awareness where before we had few, and I have attended many more high level meetings than ever before. The connections that are being made and relationships developed will stand the NPA in good stead for many years to come. We are having an impact here at last and it feels great! This is not the end however, as I will continue to look for future opportunities to have more influence here.

One final piece of work that I certainly want to see brought to life comes out of the global consumer disconnect with food production. There are plenty of sites on the internet people can look at to be told how awful farming is, but there is no one place which really accurately describes what modern farming looks like and I think that there should be. Many have tried it

in isolation and have produced very useful pages, but my vision is bigger than that.

I want to see cross sector collaboration to produce a central learning resource which provides both teaching material for schools and information and myth busting for the general public on current commercial farming: how it has evolved, why we do things the way we do, and where we see farming into the future.

There has to be a more cohesive attempt to reconnect the consumer with how their food is produced and maybe for some to have more respect for it. I have invited both the Agriculture and Horticulture Development Board and the NFU to get engaged with this and initial signs are very positive. Watch this space...



9.0 Acknowledgements

This Scholarship has not only given me the opportunity to quench my unending thirst for knowledge and taught me more about myself than I probably wanted to unearth, it has also introduced me to some amazing people. And not just those that are industry leaders or trailblazers, but ordinary people, who are truly great but who really don't see that they are that special at all. I am honoured to have met them and spent time with them all.

Special thanks go of course to the Nuffield Farming Scholarships Trust and my sponsors BPEX and Merial for giving me the opportunity in the first place - thank you for seeing the potential in me!

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I would also like to thank the myriad of people who helped me with contacts, particularly Alan Dyson, Grant Walling, Simon Davies and Marcus Bates, and those that took the time to meet with me and host me, but especially Andrey Pavlov from Miratorg who took me under his wing for two days, Steve Moffett and his family from Moffett Farms who made me feel very welcome and took me to A&E(!), Simon Oxby for giving me the low-down on Russia and Jerry Thomson and Nick Brookes from PIC who shared with me what it was like to work and live in far-flung places around the world.

Finally my thanks go to my family, for taking care of the Roxy monster whilst I was away and generally being the supportive and loving solid foundation that they have always been, and to Adam, my long suffering partner, best friend and now fiancé, for putting up with my long absences, inspiring me, encouraging me and giving me the courage to believe that anything is possible.

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