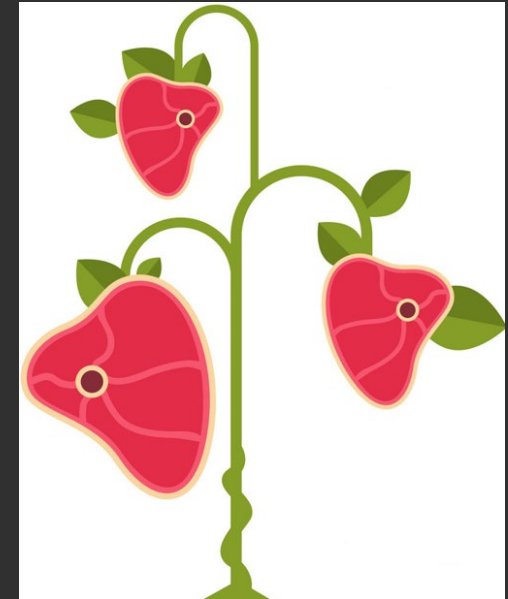




MEAT INDUSTRY THREATS



EVERYDAY
PRICE IS
DETERMINED BY
THE
CONSUMER



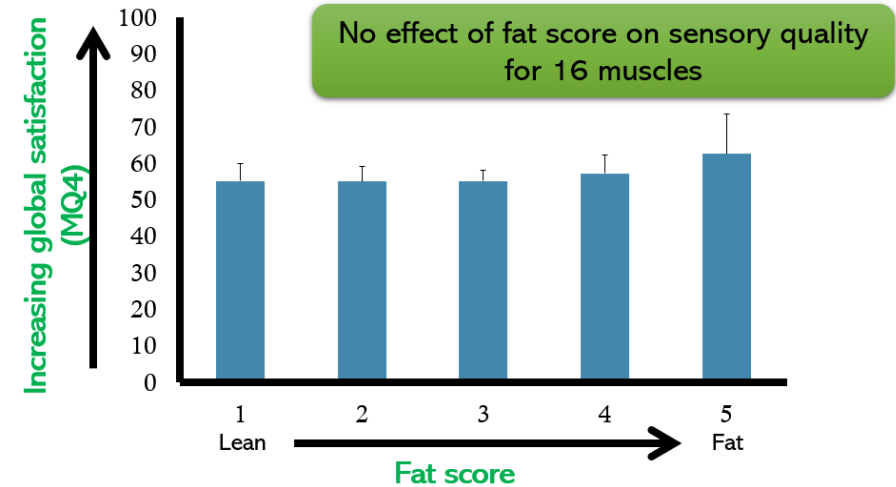
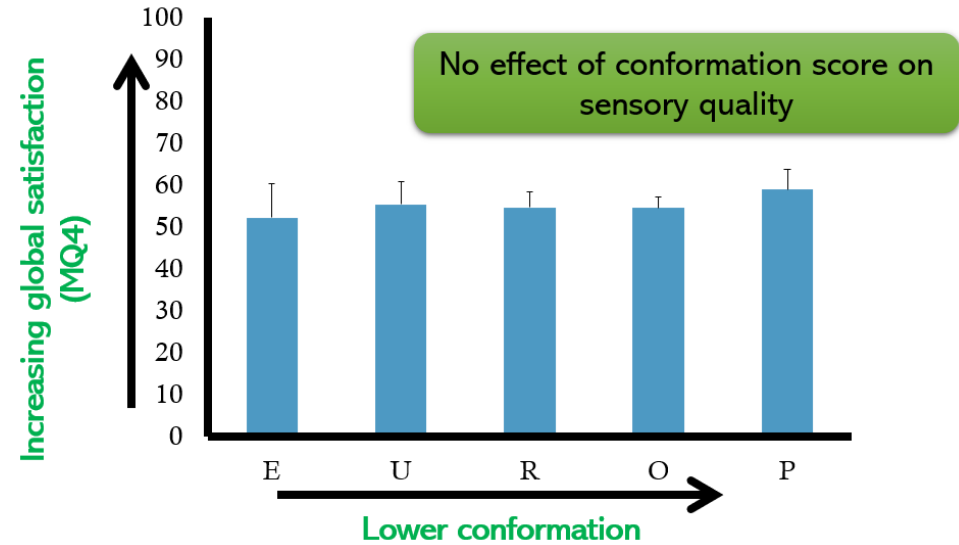
Maybe the **most expensive** one will be good?

EUROP GRADING & SUPPORT PAYMENTS

- ✓ No Eating Quality relationship to EUROP Conformation
- ✓ No Eating Quality relationship to EUROP Fat Score
- ✓ Support payments don't relate to the consumer



	I	2	3	4L	4H	5L	5H
E							
U+							
U							
R							
O+							
O							
P+							
P							



Overview of outcomes from analysis of the combined European consumer data set (S Bonny, Murdoch University, Australia & JF Hocquette, INRA, France)

MEAT INDUSTRY THREATS



To be SUSTAINABLE we need to be PROFITABLE !!








INTERNATIONAL
MEAT RESEARCH
3G FOUNDATION

Eating Quality Grading for a Sustainable beef industry

Alix Neveu – Rod Polkinghorne – Jerzy Wierzbicki – Jean-Francois Hocquette

	I	2	3	4L	4H	5L	5H
E							
U+							
U							
R							
O+							
O							
P+							
P							

Yield = kg to sell

PLUS PRICE/KG

Using the easy 3G description that accurately describes the eating experience and delivers a consistent product where the outcome is **guaranteed**.





WHAT MAKES 3G GRADING SO POWERFUL



Overcomes product inconsistency

The biggest cause of consumer dissatisfaction with beef.



3G brands speak to the consumer's major concern when purchasing beef

What is the quality and how can I be sure it will perform to my expectations?

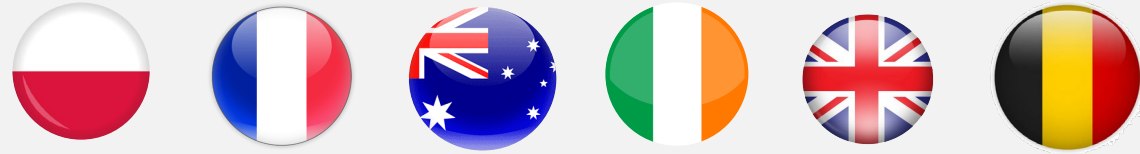


3G provides a way of describing and guaranteeing quality which is scientifically underpinned and based on actual consumer scores.



**IMR3G
FOUNDATION**
**A PROGRAM TO
ADDRESS THE
PROBLEM**

International group industry and scientific approach

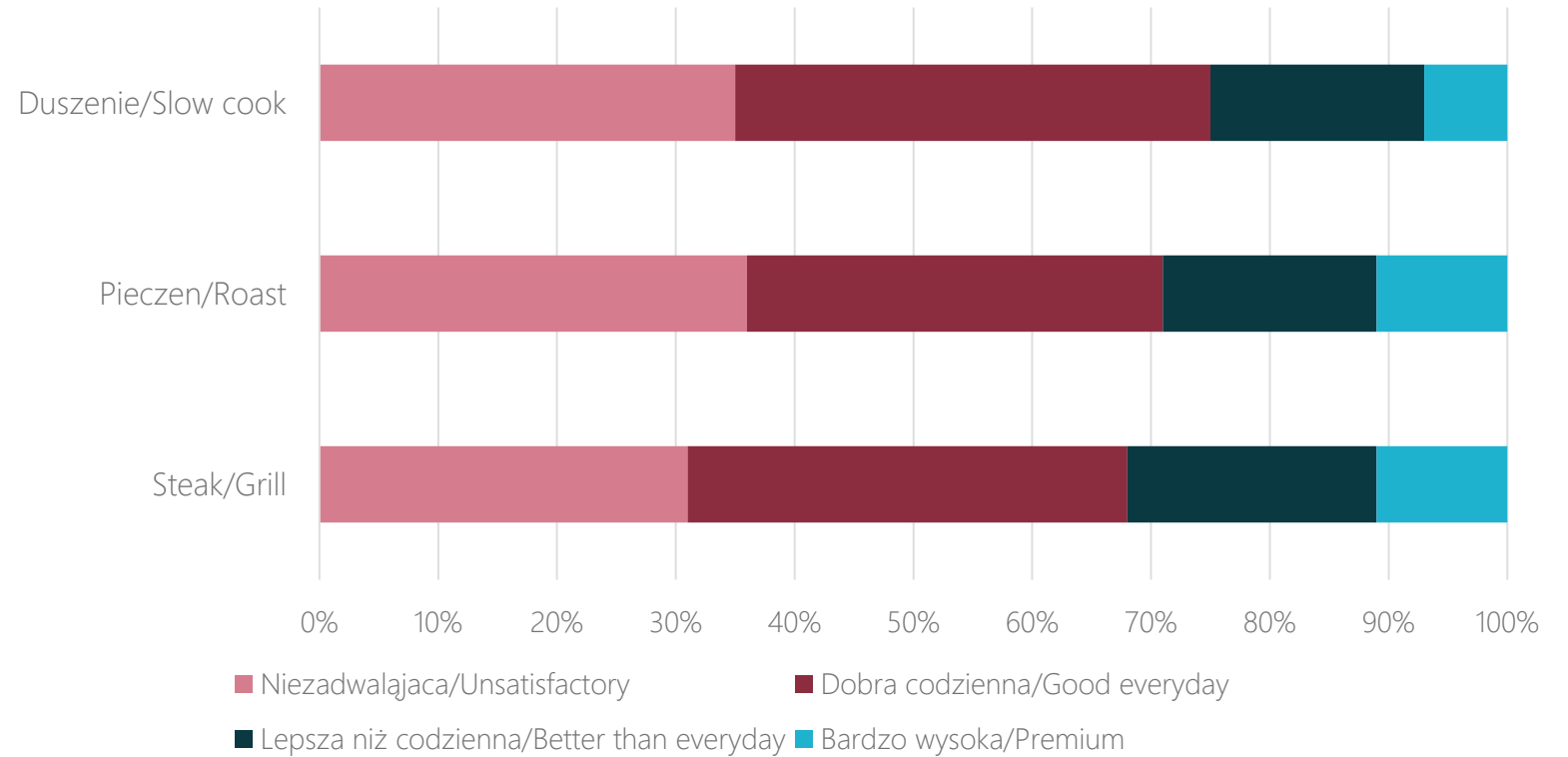


- Independent organisation
- Not aligned
- Not for profit
- Strong science
- Accessible to everyone

Polish lead UNECE rapporteur group

Agree common measurements

Consumer Satisfaction Sample % by Nominated Quality



**CONSUMERS
CONSISTENTLY
IDENTIFY**

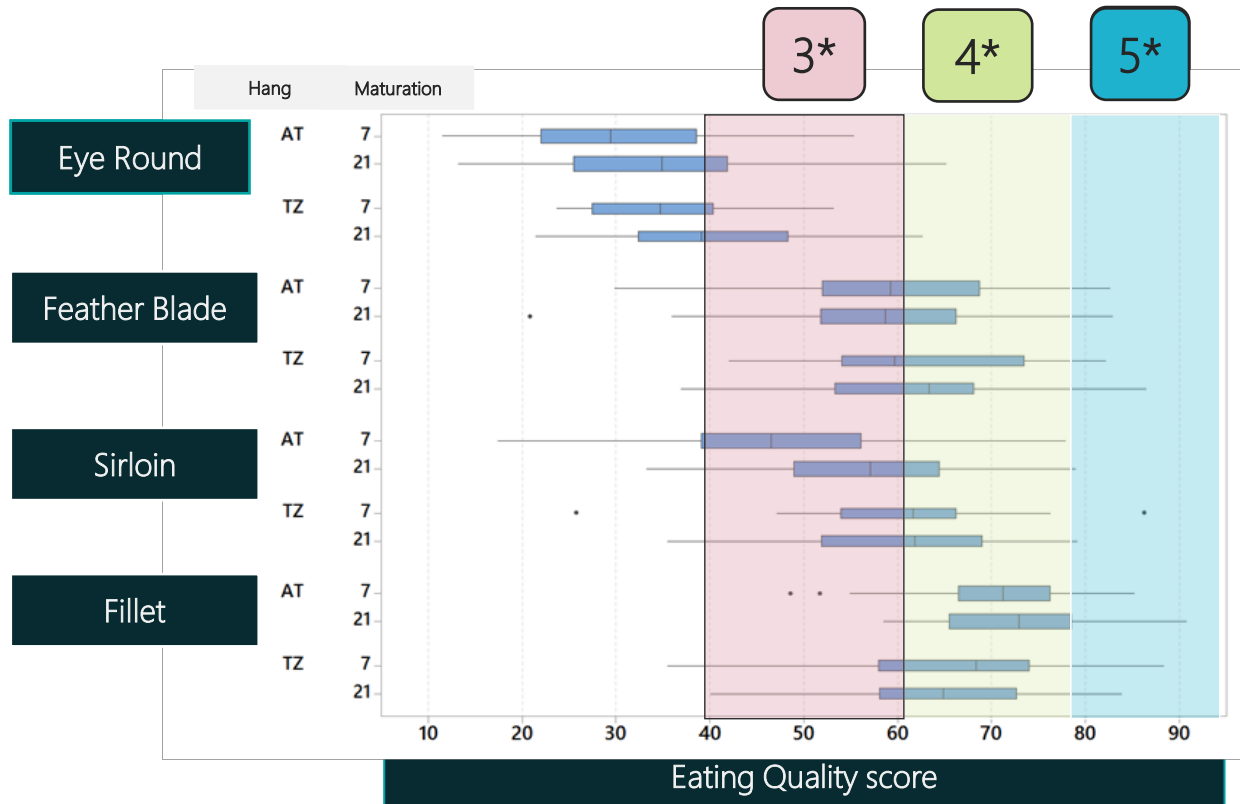
**BEEF EATING
QUALITY
VARIATION**



Source:

PROOPTIBEEF

WALES: WHAT DID THE CONSUMERS SAY?



As an example

Good Everyday (3*)
EQ Score Range: 40-61

Consumers grouped:

- The **BEST** Eye Rounds
- The **AVERAGE** Feather Blades and Sirloins
- The **WORST** Fillets

EQ is NOT determined entirely by Cut

POLISH MODEL


3G

GLOBALNY SYSTEM KLASYFIKACJI

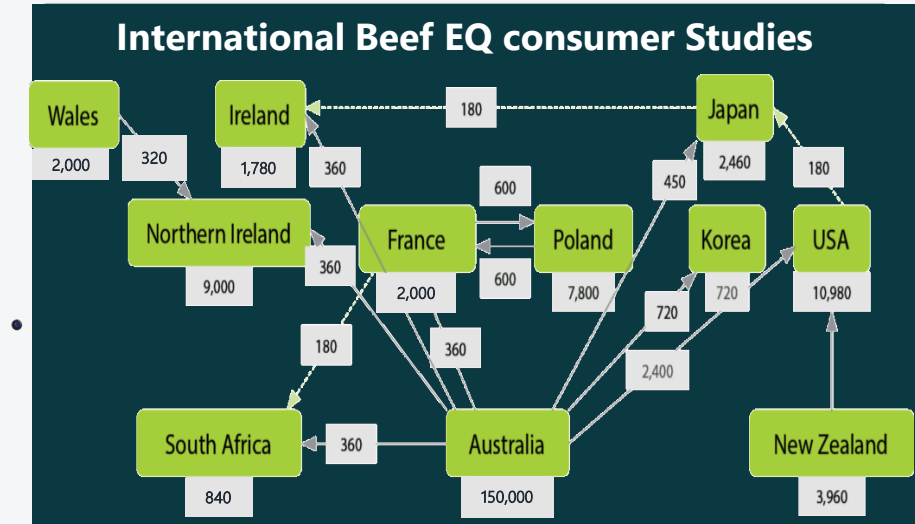
Prototyp polskiego modelu

DANE Z OCENY				Czas dojrzewania		Metoda obróbki					KRAJ	
						Grill 25	Grill 10	Grill 6	Pieczen	Duszenie	BYDŁO	KONSUMENT
Hump	Rasa		Płeć	B	Sex	76			76			
	Wysokość karku	35	Weik	375	Age	71					FRA	FRA
HSCW	Masa tuszy	420	Skostnienie	140	Uoss	72			72		IRE	IRE
	Podwieszanie	AT	Marmurk owatość	600	Umb	69			67		IT	IT
	pHu	5.5	Okrywa tł. Na Rostbefie	8	Rfat	65	62	61	62	60	NI	NI
	Kolor Mięsa		Czas dojrzewania	21	Daged	64	61	60	62	54	POL	POL
						65	62		62	68	ROM	ROM
						71	70		72	74	SP	SP
						51			52	52	UK	UK
						61	59		62			
						65	64		64			
						63			64			
						68	67		66			
						59	56		59	60		
						48			51	46		
						50	48		50	52		
										71		
						56	54		56	56		
						58	60		76	61		
										70		
						54	50	47	54	53		
						65			66	72		
						57	62		61	67		
										53		
										67		
										71		

COLLABORATIVE RESEARCH

To achieve maximum scientific value

- **DATAbank** - A group of participating countries with standardised 3G Eating Quality datasets who wish to collaborate to strengthen the analysis baselines through expanded data
- Each participating country or member has a dataset deposit box within DATAbank from which they can share data to their advantage
- The data is owned by the participating country or member and is only shared when mutually agreed



1

**Application database
with standardised tools
underpinning research trials**



Polish Research Trial



French Research Trial

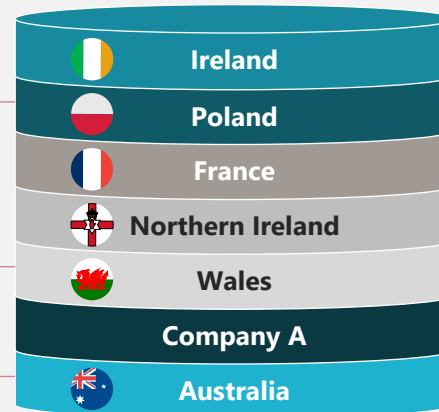


Australian Research Trial

**Uplift
when
completed**

2

DATAbank  INTERNATIONAL
MEAT RESEARCH
3G FOUNDATION



- Independently owned data
- Housed in a common database

3

Shared Data

Research Access



Trial research



Analysis



Publications

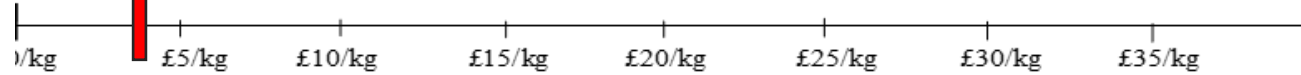


Model
development

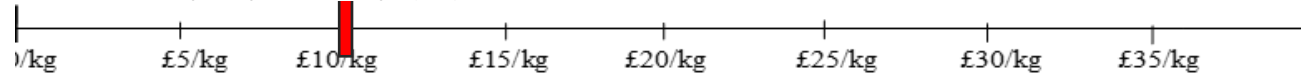
WALES: WILLINGNESS TO PAY

Based on the beef you just consumed: Please mark the line at the price per Kg you believe best reflects the value for each category.

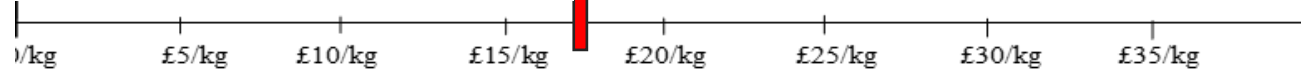
Unsatisfactory Quality (Fail)



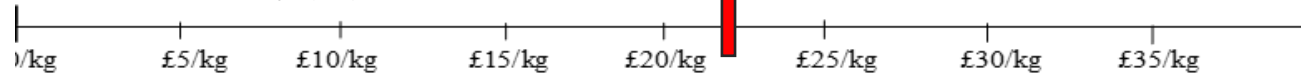
Good Everyday Quality (3*)



Better than Everyday Quality (4*)



Premium Quality (5*)



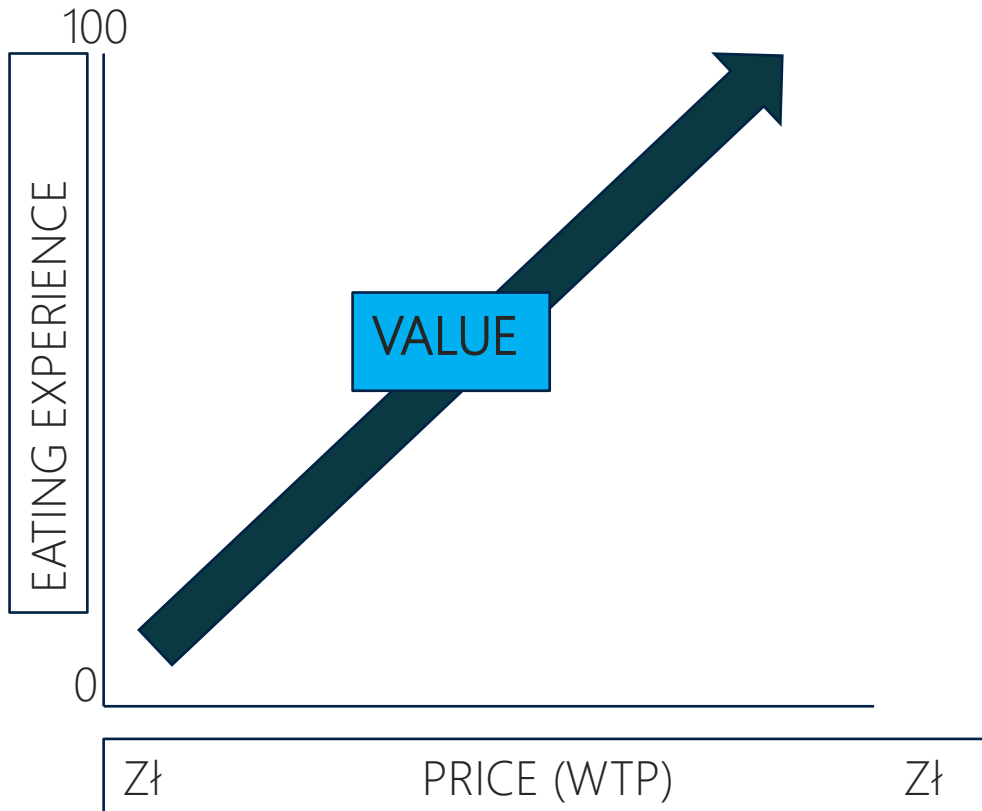
	Fail	3*	4*	5*
Price £/Kg	£4.25	£9.99	£15.42	£22.09
% of 3*	42.5%	100.0%	154.4%	221.1%

Relative to 3* Consumers are willing to pay
MORE THAN DOUBLE for 5* Product

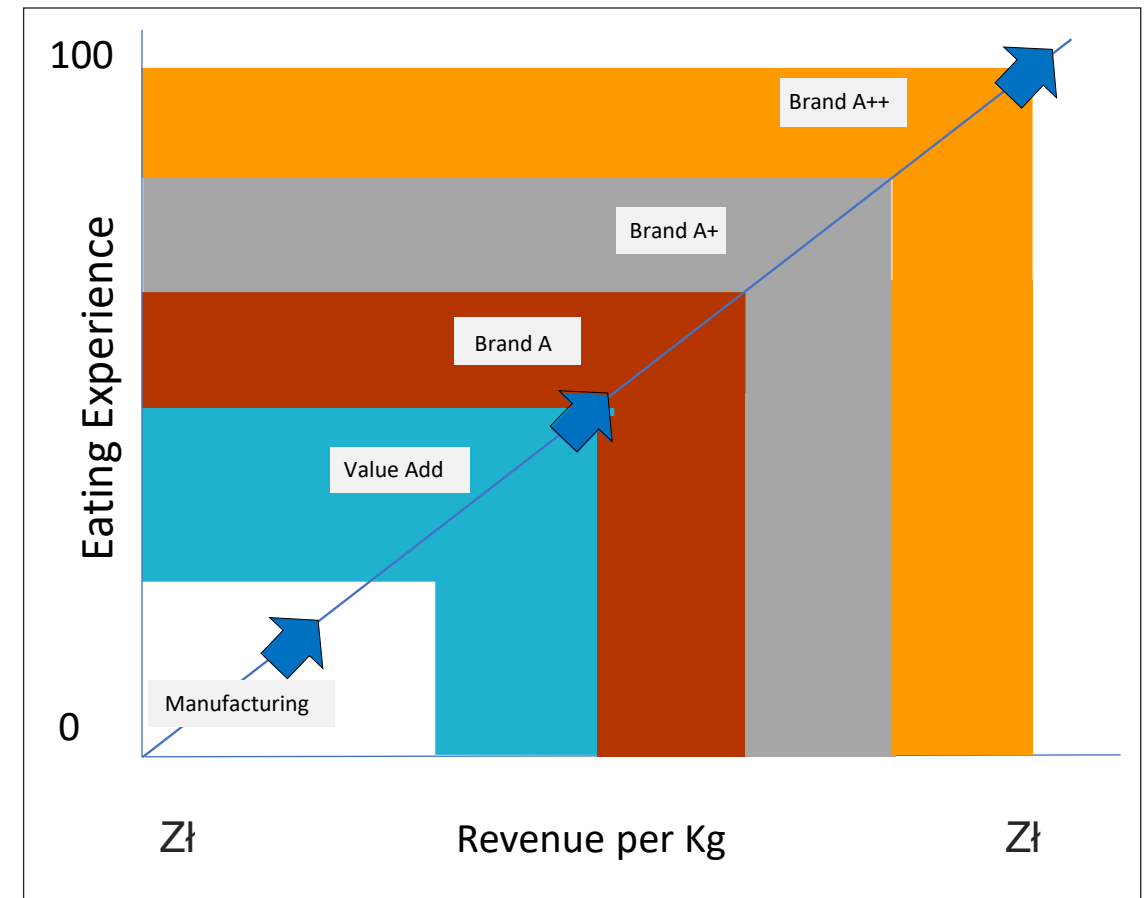
Consumers value unsatisfactory beef at **LESS THAN HALF 3***

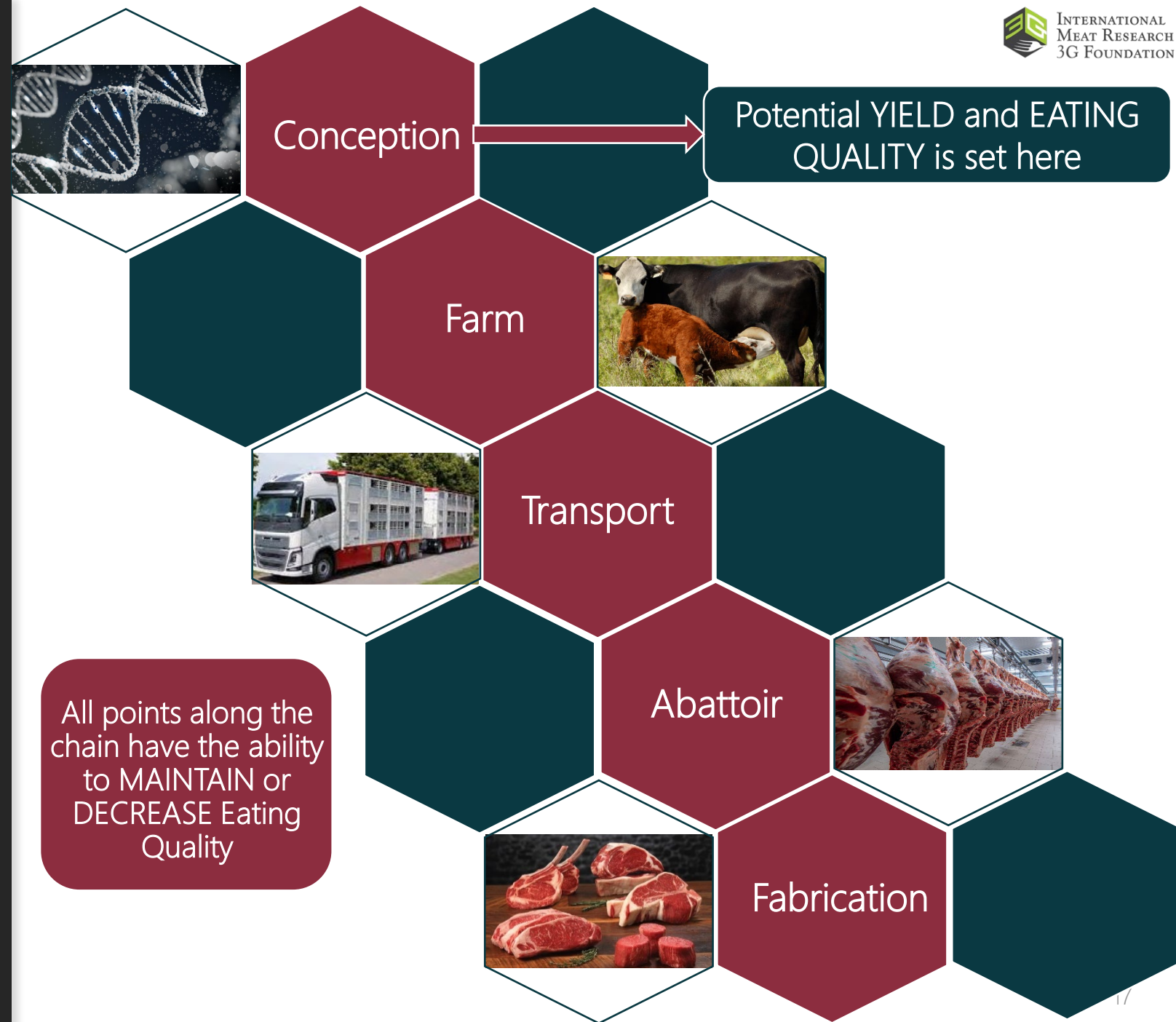
REVENUE FROM BRAND PERFORMANCE

PRICE IS DETERMINED BY PERFORMANCE



BRANDS











**ALL SECTORS
HAVE AN IMPACT**

Clear, simple and accurate description of beef meal outcome

COMMERCIAL APPLICATION





A solid scientific base to strengthen beef brands

The Occasion		 Grill	 Roast	 Slow cook	 Stir fry	 Shabu shabu	 Yakiniku
Premium	3G Score	Brand A++	Brand A++	Brand A++	Brand A++	Brand A++	Brand A++
Special		Brand A+	Brand A+	Brand A+	Brand A+	Brand A+	Brand A+
Good Everyday		Brand A	Brand A	Brand A	Brand A	Brand A	Brand A

Marketing according to a desired sensory quality result

Which cooking style will be used and what level of quality is required

IF YOU'D LIKE TO

-  Sell at a higher price
-  Deliver a better customer experience
-  All within your existing business
-  Help us to fight meat threats

Schedule a consultation on how we can help you today.

imr3g.org

Contact:

Alix Neveu– a.neveu@imr3g.org



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