



The leadership dividend in sustainable beef

The compelling case for action

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Three points to set the scene



People will continue
to eat beef (lots of
people!)

The market is
changing, and the
beef industry needs to
respond

Leaders have the
opportunity to shape
the future in their
favour

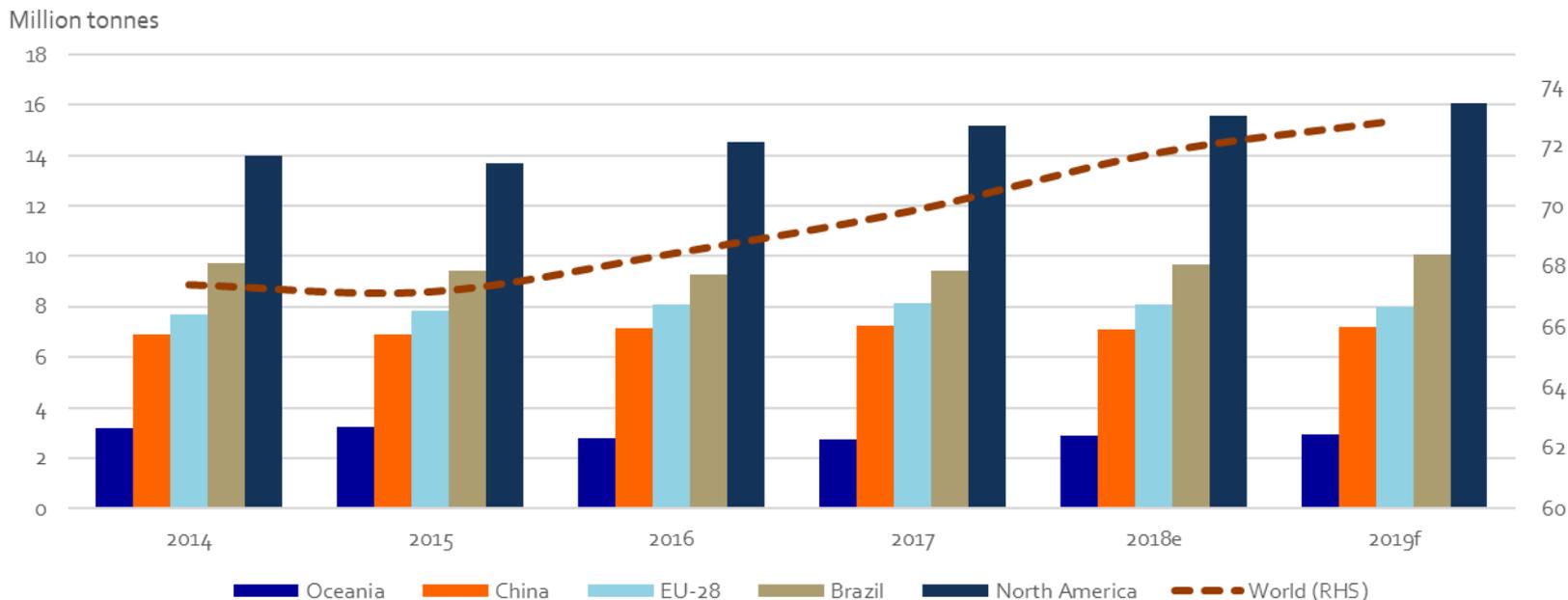


Beef production outlook

Positive short-term outlook for beef production



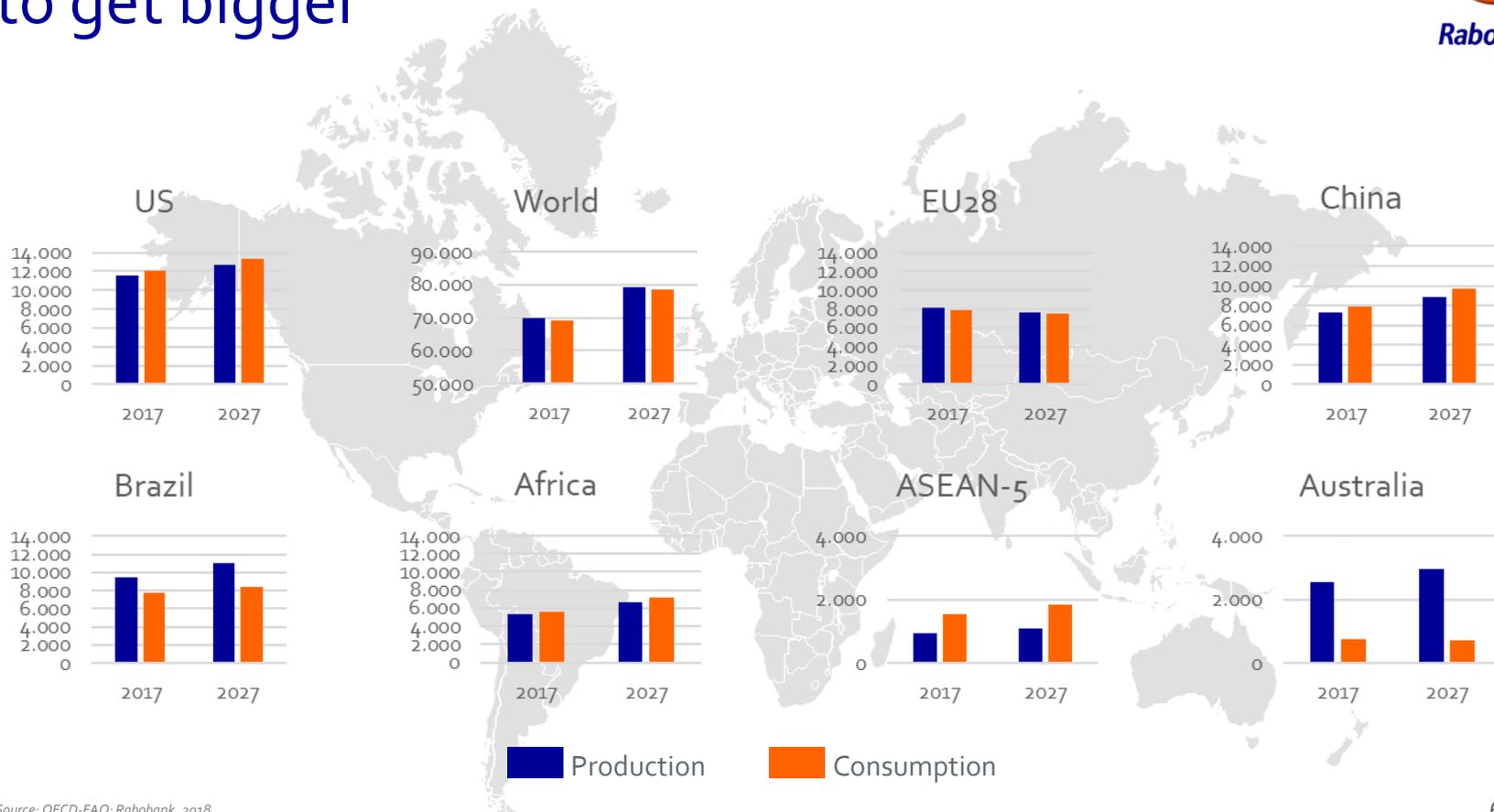
Beef production rising, led by North America and South America



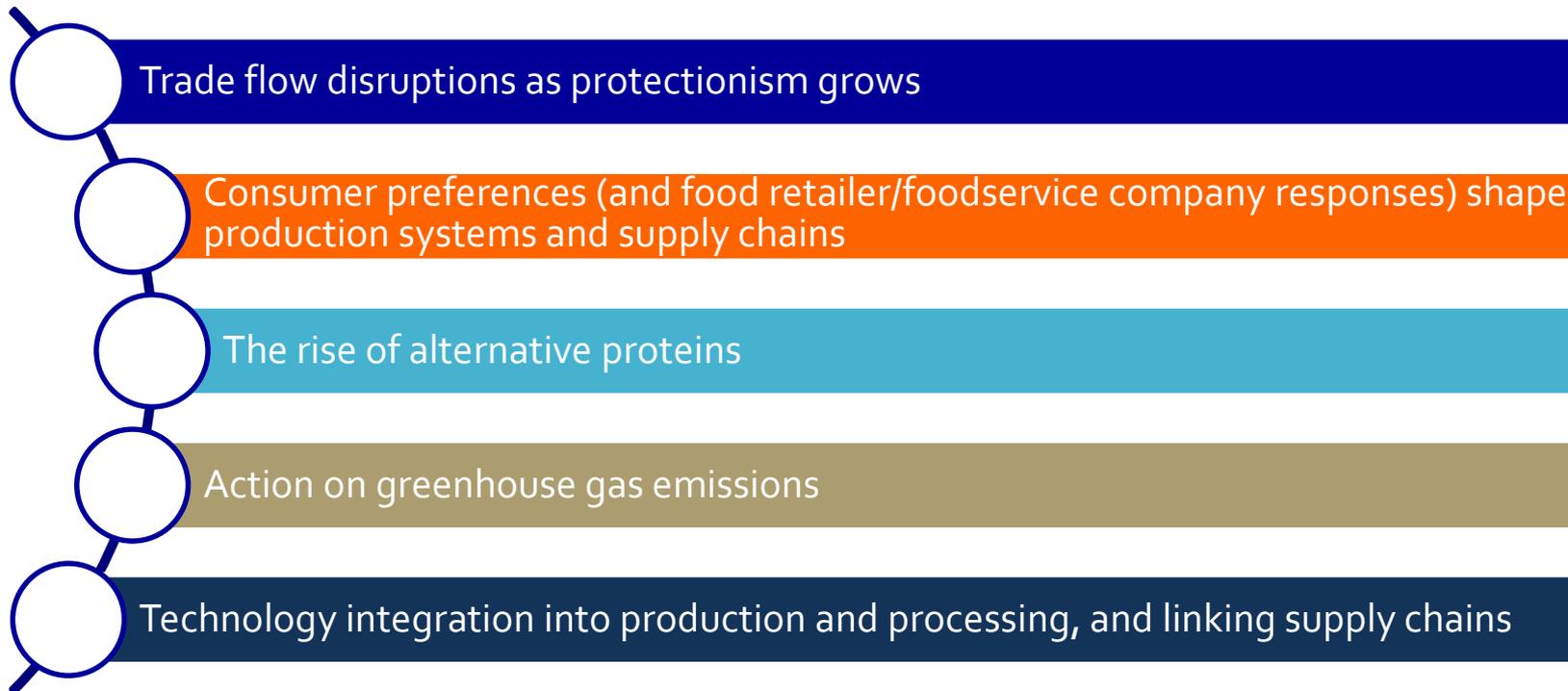
Four issues drive the near term outlook



Longer term outlook – (most of) the giants plan to get bigger



Longer term, five issues shape the outlook





Navigating through a busy and unpredictable world

Sustainability commitments around beef could look quite different

Ikea—a global top 10 food company—is growing food revenue, not footprint



Building a new market is possible



Protix is building a market for insects by focussing on what it can do



Why selling less product can make sense



Heineken is turning a shrinking market into a growth opportunity



A blurred city street at sunset. The sun is low on the horizon, creating a strong golden glow and long shadows. A person is walking away from the camera in the distance. The buildings and street are blurred, suggesting motion. The overall mood is contemplative and hopeful.

Who shapes our destiny?
Leaders do

The leadership dividend is clear and compelling



Leadership means setting the direction, not following. Leadership builds trust. It will generate business value in four areas:

Improve risk management

Increase efficiency

Maintain or grow
market access

Retain access to capital



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