

Hybu Cig Cymru

September 2025



The Welsh Parliament is the democratically elected body that represents the interests of Wales and its people. Commonly known as the Senedd, it makes laws for Wales, agrees Welsh taxes and holds the Welsh Government to account.

An electronic copy of this document can be found on the Senedd website:
www.senedd.wales/SeneddEconomy

Copies of this document can also be obtained in accessible formats including Braille, large print, audio or hard copy from:

Economy, Trade and Rural Affairs Committee
Welsh Parliament
Cardiff Bay
CF99 1SN

Tel: **0300 200 6565**

Email: **SeneddEconomy@senedd.wales**

X: **@SeneddEconomy**

© **Senedd Commission Copyright 2025**

The text of this document may be reproduced free of charge in any format or medium providing that it is reproduced accurately and not used in a misleading or derogatory context. The material must be acknowledged as copyright of the Senedd Commission and the title of the document specified.

Hybu Cig Cymru

September 2025



About the Committee

The Committee was established on 23 June 2021. Its remit can be found at:
www.senedd.wales/SeneddEconomy

Current Committee membership:



**Committee Chair:
Andrew RT Davies MS**
Welsh Conservatives



Hannah Blythyn MS
Welsh Labour



Luke Fletcher MS
Plaid Cymru



Samuel Kurtz MS
Welsh Conservatives



Jenny Rathbone MS
Welsh Labour

Hefin David MS was a Member of the Committee during this inquiry. He sadly passed away on 12 August 2025.



Hefin David MS
Welsh Labour

The following Member attended as a substitute during this inquiry.



Alun Davies MS
Welsh Labour

Contents

Chair's foreword	5
Recommendations and Conclusions.....	6
1. Background	9
2. Governance and ownership	10
Calls for HCC to be industry owned	10
Industry representation on the board.....	11
HCC's governance structure	12
The Irish Approach	14
Our view	15
3. Financial position and funding.....	17
HCC's budget.....	17
Financial sustainability.....	17
Declining livestock numbers	20
Our View	22
4. Leadership and staff morale	24
Problems with leadership	24
Staff morale affected but recovering.....	25
Our View	27
5. Delivery against priorities	28
Is HCC delivering?	28
Collaboration with other UK levy bodies.....	30
Farming Connect.....	32
HCC's working relationship with the Welsh Government	33

Our View.....	35
6. Relationship with levy payers	37
HCC's engagement with farmers.....	37
Engagement with processors	39
Our View.....	39
7. Promoting red meat	41
The impact of HCC's work at events.....	41
The impact of promotional activities and marketing campaigns	41
Is HCC a strong advocate for the industry?	42
Our View.....	44
8. Future Strategy	45
Our View.....	48
Annex 1 : List of oral evidence sessions	49
Annex 2: List of written evidence	50
Written evidence.....	50
Additional Information	50

Chair's foreword

Our red meat industry is something that Wales can be very proud of. From summer barbeques to the traditional roasts and state dinners Welsh beef and lamb take pride of place on plates across the world. The quality of our meat and the welfare of our animals are truly world class and I would personally argue they are second to none. So it is important that the body responsible for promoting our red meat is also second to none.

Hybu Cig Cymru has faced recent challenges that will have been a major distraction from it's core task. This report does not look to examine the allegations or issues that have recently beset HCC. Instead, we decided to produce a forward looking report which aims to ensure steps are taken to get HCC back on track and stop similar issues happening in the future.

The report makes nine recommendations and draws three conclusions. The recommendations include looking at the governance, and indeed possibly the ownership, of HCC in order to strengthen controls and give levy payers a more direct influence over the organisation. HCC has a big task and funding is clearly going to be a challenge for it in the future, so the report also asks the Welsh Government to grab this issue by the horns. We believe measurement is important to ensure HCC is preforming, so we have made recommendations around both KPIs and reporting of progress.

The introduction of the Sustainable Farming Scheme, changes to inheritance tax and the potential reduction in stock numbers mean this is a very uncertain time for farmers. Standing still can not be an option for HCC. Both HCC's Board and the Welsh Government must grab this opportunity to reinvigorate the organisation and ensure it is fit to play its key role in supporting our world class red meat sector and so in turn our farmers.

I would like to thank everyone who gave evidence to this inquiry. I hope the Welsh Government will implement our recommendations and this will lead to a revitalised HCC playing a vital role to support one of our key industries.

Andrew RT Davies MS

Chair

Recommendations and Conclusions

Recommendation 1. The Welsh Government should review the governance of HCC with the aim of enhancing representation of levy payers views and increasing wider industry involvement within the organisation. As part of this review they should consider all options ranging from reserving specific positions on the board for levy payers and the wider industry to returning full ownership of the organisation to the levy payers..... Page 16

Recommendation 2. The committee fully support the continued use of the statutory levy as a method for funding HCC, however the evidence received, including from HCC, was clear that levy income alone is not sufficient to cover the current remit and workload of the organisation. The Welsh Government should set out how they intend to continue funding HCC or how they expect HCC to continue to operate financially.....Page 22

Recommendation 3. It is evident that for HCC to fulfil its extensive mandate, additional funding will be necessary. The Welsh Government and HCC should explore all possible avenues to increase HCC's budget, including identifying work that HCC could perform to complement other Welsh Government policies and securing financial support from the Welsh Government for such initiatives. Furthermore, they should identify other funding sources that HCC could apply for including grants and possibly provision of services to other organisations. However, any increase in funding for HCC must be accompanied by enhanced accountability and performance measures.....Page 23

Recommendation 4. In order to support both farmers' and processors' business planning, the Welsh Government should make its position on future livestock numbers clear. If the Welsh Government decides to support a reduction in livestock numbers, it should set out the anticipated impact of this on the processing industry and provide any support that may be required.Page 23

Recommendation 5. HCC should regularly report to the Welsh Government outlining progress on producing and maintaining a healthy corporate culture for the next three years. The Welsh Government should continue to monitor the culture at HCC and keep this Committee and its successor in the next Senedd informed on HCC's progress in this area.....Page 27

Recommendation 6. HCC has a very wide remit, however the Committee believes HCC must focus its work to match its reduced budget. To achieve this the Welsh Government should agree new, measurable and transparent KPIs with

HCC. Progress against these KPIs should be regularly measured by the Welsh Government and the outcome of that review should be published in a manner that is clear and transparent to levy payers and other stakeholders. The new KPIs should include indicators which:

- Set clear expectations around engagement with stakeholders and levy payers including meeting levy payers where they are and ensuring clear visibility and accessibility of HCC staff including senior leadership;
- Ensure best value for levy payers and any additional public money HCC may receive; and
- Ensure strong outcomes from promotional activities which is measured in a clear and open way. Page 36

Recommendation 7. The Welsh Government should undertake a review to identify areas where HCC could increase joint working and/or resource sharing with other levy boards and other relevant devolved organisations such as Farming Connect. This should include looking for areas where they can minimise duplication of effort and take advantage of potential economies of scale. The purpose of this review should be to identify areas where savings could be made which can be reinvested into HCC's core business of promoting Welsh meat and developing the red meat sector. This review should not be limited in scope and must extend beyond simple information sharing to aspects like joint procurement and sharing back-office functions..... Page 36

Recommendation 8. HCC must ensure it is measuring the impact of promotional activities through tangible and comparable data which will show outcomes not just activities. One option to achieve this would be building on the work it has done with retailers on the use of loyalty card data to understand the direct impact of their work. The details of this measurement and the outcomes should be communicated clearly and openly to levy payers.....Page 44

Recommendation 9. The Welsh Government and HCC must ensure industry voices are well represented in their work to update the HCC Framework Agreement. To achieve this the Welsh Government must consult with industry 'where they are' to ensure it is hearing all voices, not just those who have the time and ability to easily engage with the Welsh Government. Page 48

Conclusion 1. A healthy and open corporate culture is important for the performance of any organisation as well as the wellbeing of its staff. The Committee welcomes measures implemented by the new Chief Executive and believes these must be followed up and maintained into the long term.....Page 27

Conclusion 2. The Committee was pleased to hear HCC is working with other Levy Boards in non-competitive areas and with Farming Connect. The Committee believes these efforts should be increased to maximise joint impact, ensure duplication of effort is minimised and to support levy payers and stakeholders' engagement with HCC..... Page 36

Conclusion 3. The Committee was pleased to hear work on this is underway to improve HCC's engagement with stakeholders. HCC must strengthen its communications and engagement with levy payers. To achieve this HCC must meet levy payers where they are e.g. attending livestock auctions and visiting abattoirs. Page 39

1. Background

Hybu Cig Cymru – Meat Promotion Wales is a Company Limited by Guarantee wholly owned by the Welsh Ministers. It is responsible for developing, promoting and marketing red meat from Wales.

- 1.** Hybu Cig Cymru (HCC) works with retailers, processors and food service operators in the UK and in overseas markets to strengthen business opportunities. It runs promotional programmes for Protected Geographical Indication (PGI) Welsh Lamb and PGI Welsh Beef. HCC also undertakes research and development, shares information and supports training, to support the Welsh red meat industry to improve quality, increase cost-effectiveness and add value to Welsh red meat products.
- 2.** HCC has had a turbulent recent past which includes an internal investigation into accusations of bullying, the departure of the Chief Executive under a cloud and what has been described as a ‘staff exodus’. Whilst these issues are discussed in this report Members made a specific decision that this inquiry should be forward looking and not unpick previous actions, decisions and HR processes.
- 3.** The terms of reference for the Inquiry were to review the effectiveness of HCC in delivering on its priorities and providing value for money to levy payers. Specifically, Members considered the following areas:
 - HCC’s performance in delivering against its current priorities.
 - The appropriateness of HCC’s purpose, priorities and activities, and whether they should be revised.
 - The relationship between HCC and the farming and meat processing/exporting sector, including whether HCC is delivering value for money to levy payers.
 - The relationship between HCC and the Welsh Government, including whether the Welsh Government should have more oversight.
 - Whether HCC is the most effective vehicle for developing, promoting and marketing red meat from Wales, and whether a red meat levy is the most effective means of funding this activity.

2. Governance and ownership

4. As mentioned above, the Committee had decided this work and any recommendations would be forward looking. Dealing with the direct aftermath of the recent issues faced by the organisation is covered in the fourth chapter of this report. However, the Committee strongly believes it is important that the governance structure of HCC is overhauled to ensure a similar situation can not arise in the future.

Calls for HCC to be industry owned

5. The Committee heard calls for HCC to be industry owned. Dunbia said “We believe that HCC should remain under industry control as it’s primarily funded by the Welsh red meat levy”. They went on to suggest:

“It may also be time to consider clearly defining or possibly separating the relationship between HCC and the Welsh Government, allowing levy payers to assume greater control over any future red meat levy body.”

6. In their written evidence Kepak told Members “In 2003, HCC was owned by Industry (Farming Unions, WDA, WLBP and MLC) not by Government and that arrangement worked well”.² They expanded on this in their oral session saying:

“I recognise that you need experts in different fields, be that marketing or legal experts or financial experts, but I think the majority of the board should be active stakeholders, active levy payers, effectively. If my memory serves me right, in 2003, it was owned, effectively, by industry, and it changed later on to facilitate the Welsh Government providing funds for HCC. And those funds were significant. They ranged from about 35 per cent to 47 per cent of total income that came from either EU or Government money—and it wasn’t just EU, but there was also ‘clean money’, if you see what I mean, coming in as well. That’s not the case now. Perhaps it is time now for industry to go back to that. It needs to be clear and transparent in terms of

¹ Written evidence, [Dunbia](#)

² Written evidence, [Kepak](#)

ownership, in terms of who is on the board, who is leading it, so that it really has buy-in from the industry as well.”³

- 7.** When Members put this to the Deputy First Minister he responded:

“... if it was a totally floated-off, purely levy-funded body that was divorced from Government, ... we’d still be having to have meetings with them and saying, ‘So, tell me, how are you contributing to the SFS then? How are you contributing to sustainability and decarbonisation? ... so what’s the benefit of a floated-off organisation that might feel one step divorced from Government, when I suspect this organisation will be coming back to me and saying, ‘Minister, we think you’ve got a role to play and we think you might need to put some funding in?’”⁴

Industry representation on the board

- 8.** HCC’s Board of Directors is made up of the Chair plus 10 members; appointments are made by the Welsh Ministers in accordance with the Commissioner for Public Appointments’ code of practice. HCC’s Business plan states “The Board is representative of farmer and processor levy payers and others who possess skills relevant to the future development of the organisation”⁵.

- 9.** The Committee heard calls for more industry representation on HCC’s Board. In their written evidence Kepak told Members:

“Since farmers and industry pay levy to HCC, it is extremely important that farmers and industry are fully represented in the HCC Board and can control/direct how that public money is spent for the benefit of all. Hence Board representation should be selected by the Industry and not by Government and chosen from active stakeholders.”⁶

- 10.** In their oral evidence Kepak expanded on this saying “I think the challenge really is that we need a levy body that’s got active levy payers steering the ship in

³ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 65

⁴ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 146

⁵ [Business Plan for Hybu Cig Cymru – Meat Promotion Wales 2022-2026](#)

⁶ Written evidence, [Kepak](#)

terms of the board. Significantly less than half of the board members pay levy at the moment”⁷.

11. The WLAA’s written evidence argued there is a “lack of representation of the liveweight sector within the work of HCC” and suggested they “would be open to discussions to provide representation of the liveweight sector on the HCC board”⁸.

12. The Deputy First Minister told Members: “I believe some of the recent appointments have strengthened that as well, not just with José Peralta, but the other two board members that we’ve brought on board as well. The board needs to be properly diverse and reflective of the different parts of the sectors of red meat, but also other capabilities as well”⁹. He went on to say:

*“So, at the moment, there are farmers; there are levy payers; there are knowledge exchange people; marketing, finance, environmental sustainability, academics. Animal health and research people are on there. It’s a strong board.”*¹⁰

13. However, he added:

*“On the board membership, look, I’ve taken a strong message away, and HCC will have heard this as well, in terms of the opportunities that are coming up in the next 12 months, in terms of new appointments to the board, to make sure that some of those points around processing and other parts are reflected.”*¹¹

HCC’s governance structure

14. Both farming unions have argued for maintaining HCC’s current governance structure and independence from the Welsh Government. They also advocate for more levy payer influence in HCC’s decision making.

15. In their written evidence NFU Cymru told Members: “NFU Cymru places significant importance on the organisation retaining a level of independence from Welsh Government. It is vitally important that the organisation remains a limited company with a Board of Directors that has strong industry representation. This is

⁷ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraphs 15-17

⁸ Written evidence, [Welsh Livestock Auctioneers’ Association](#)

⁹ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 59

¹⁰ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 60

¹¹ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 133

essential so that it has the necessary accountability to both industry and Ministers. It is imperative that producers feel that they have genuine accountability for how the money they provide through the levy is spent¹². The expanded on this in the oral session saying:

“we feel quite strongly that levy payers should have a greater say in terms of the appointment process to the board. I think you could potentially even go a step further and suggest, in terms of the board, whether there should be direct representation from organisations such as ourselves and such as the processors in Wales, who represent levy payers in terms of the producer and processor sectors.”¹³

16. FUW suggested “Despite being an arm’s length body, HCC should have the ability to openly challenge any UK and Welsh Government policies which appear to go against their own Mission Statement and strategic objectives, and most importantly, the interests of its levy payers”¹⁴.

17. In their written evidence HCC said: “The current level of Welsh Government involvement in HCC ... provides ... the right balance between freedom of execution and accountability oversight in both strategic outlook and financial delivery of objectives”¹⁵.

18. HCC said their board is “made up of a real cross-section of the industry, so farmer levy payers, supply chain, sustainability, marketing, really strong governance experience, somebody from a plc background with significant commercial experience”¹⁶.

19. HCC set out what they saw as the advantage of the current ownership model to the Committee:

“the advantages of the Welsh Government owning us, effectively there are two, in my view. One is it gives it the ability to actually support the organisation, and, two, it acts as a funnel to try to co-ordinate as a third party what could be a very different set of views and opinions,

¹² Written evidence, [NFU Cymru](#)

¹³ Economy, Trade, and Rural Affairs Committee, 12 March 2025, Paragraph 114

¹⁴ Written evidence, [FUW](#)

¹⁵ Written evidence, [Hybu Cig Cymru](#)

¹⁶ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 257

whether you're a processor as part of the industry or whether you are a farmer as part of the industry".¹⁷

20. In his evidence paper the Deputy First Minister stated: "Welsh Government believes that the current structure and governance arrangements relating to powers Welsh ministers have delegated to HCC are appropriate and effective."¹⁸

21. When asked in Committee why, if it no longer receives Welsh Government funding, HCC needs to agree its KPIs with the Welsh Government, the Deputy First Minister's official explained the HCC Board first agrees the KPIs and then submits them to the Minister.¹⁹ The Deputy First Minister noted:

"... whatever model HCC has now and going forward, it's really important that they will still need to work with the grain of the policy framework that this Senedd and Welsh Government set."²⁰

The Irish Approach

22. The Committee heard a lot of positive views of Bord Bia, the Irish Food Board. Many stakeholders held them up as an example that could be followed. NFU Cymru told Members "if you look at governance structures in other countries, then I would say that there is potentially an opportunity to move towards a Bord Bia-type approach that you've got in the Republic of Ireland". They went on to explain:

"Bord Bia is a semi sort of state agency, but it is very much industry led. The levy contributes to the funding there, but also the Government puts in a significant amount of funding to be able to support in terms of the marketing and promotion of Irish food and drink, as well as undertaking industry development measures on farm and in the processing sector."²¹

23. However, Bord Bia's remit is broader than that of HCC and it has a significantly larger budget. Its 2023 Accounts show an income of €98m, with

¹⁷ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 257

¹⁸ Written evidence, [Welsh Government](#)

¹⁹ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 45

²⁰ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 43

²¹ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 106

€77m coming from government funding, €6m levy funding and €11m from project and other income (figures are rounded to the nearest €1m).²²

24. The Deputy First Minister noted Bord Bia’s significantly broader remit and larger budget and highlighted that HCC doesn’t work in isolation in Wales. He said: “there is a wider ecosystem of bodies who are out there within any nation’s agricultural sphere”. He gave the examples of Farming Connect and the Food and Drink Wales Industry Board and asked if the Bord Bia model “was to be imposed on Wales, what does that then mean for the other organisations that are out there ...?”.²³

Our view

Welsh beef and particularly Welsh lamb are world renowned. The quality of our meat, the welfare of our animals and the lower carbon footprint of our products are all strengths of which we as a nation should be proud. They are also what make our meat products premium.

These premium products require an organisation of the highest calibre to support their success. Such an organisation must be characterised by robust leadership and a well-defined strategic vision set from the board level downward. The recent turmoil at HCC unfortunately indicates that strong leadership has been lacking. To guarantee that Welsh red meat benefits from an exemplary promotion body, we recommend a thorough review and revision of both HCC’s ownership structure and the composition of its board.

While we fully support the levy process and believe it should remain in place, the Committee is not convinced that HCC naturally must be owned by the Welsh Government. We believe an HCC owned by the levy payers could be more responsive to their needs and could better reflect their desires regarding how Welsh red meat is promoted.

Strong governance is important in any organisation, especially organisations like HCC where the customers can not vote with their feet and decide not to pay for their service. In HCC’s case, ensuring strong governance is particularly important – there has clearly been governance failure recently or the well publicised issues within the organisation would not have been allowed to occur.

We were concerned to hear that many stakeholders did not believe the HCC Board was representative enough of the industry and levy payers. We were

²² Bord Bia, [Annual Report and Accounts 2023](#)

²³ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraphs 85 - 87

surprised to note that no processors or auctioneers were represented on the Board. Who ever owns it, HCC must work for levy payers and for the wider industry. The best way to facilitate this is to ensure levy payers and the industry are represented at the highest level of decision making in the organisation.

Strong consideration must be given to ensuring adequate industry representation, and particularly levy payers, on HCC's board. Consideration should be given to reserving places on the board for people whose specific role is to represent levy payers. As the current Chair's term is coming towards its end, we believe this is an ideal time to restructure the Board in order to improve future representation and to achieve the aims discussed in this section.

Recommendation 1. The Welsh Government should review the governance of HCC with the aim of enhancing representation of levy payers views and increasing wider industry involvement within the organisation. As part of this review they should consider all options ranging from reserving specific positions on the board for levy payers and the wider industry to returning full ownership of the organisation to the levy payers.

3. Financial position and funding

HCC's budget

25. HCC's core funding comes from Welsh Red Meat Levy which is jointly paid by producers and slaughterers/exporters, raised on all cattle, sheep and pigs slaughtered in Wales or exported live. Funding also comes from repatriated levy, i.e. levy that's calculated on livestock born and reared in Wales and slaughtered in England or Scotland. HCC received additional funding via the European Agricultural Fund for Rural Development and the Welsh Government until September 2023.²⁴

26. HCC's Annual Report and Financial Statements for 2023-24 show an operating deficit of £505,274, compared with a deficit of £118,867 in the previous year. Amongst other things, the Directors' Report highlights lower than projected levy income due to a contraction of the national flock and a reduction of the lamb crop, resulting in a decrease in levy income in-year of £458,000 against budget.²⁵

27. The Director's Report also says that HMRC changed HCC's VAT status effective from 1 April 2024. It says HCC can no longer recover a significant proportion of VAT incurred on its costs, reducing expenditure budget by £400,000.²⁶

28. The new Chief Executive of HCC told the Committee that this year's accounts would be balanced.²⁷

Financial sustainability

29. The Committee heard wide ranging support for the continuation of the Welsh Red Meat Levy. NFU Cymru told Members:

"It's extremely important that we have a levy body in Wales to deal with the marketing, promotion and development of the industry, to address a number of market failures that, obviously, we have in the industry, and issues that individual producers or processors wouldn't be able to achieve on their own. So, the value and the use of a levy body in terms of undertaking that activity is extremely important, and

²⁴ Meat Promotion Wales [Red Meat Levy](#);
Written evidence, [Hybu Cig Cymru](#)

²⁵ Hybu Cig Cymru, [Annual Report and Financial Statements Year Ended 31 March 2024](#)

²⁶ Hybu Cig Cymru, [Annual Report and Financial Statements Year Ended 31 March 2024](#)

²⁷ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 166

*it's for all of us as an industry to work together to make sure that we deliver and that our levy body can help to deliver a productive, progressive and profitable red meat sector in Wales."*²⁸

30. The FUW added:

*"we can't underestimate the importance of having an effective red meat levy board in Wales."*²⁹

31. However the Committee heard many concerns about the ongoing financial viability of HCC. Kepak told Members the challenge of HCC's dwindling funding is affecting its ability to fulfil its remit:

"... with the wide remit that HCC has ..., that is not enough money. It doesn't matter how good you are, you can't pull that rabbit out of the hat ...

*When I was working for HCC as well, the income, if I recall, was over £6 million, and the buying power of that was significantly more because of the VAT issue, and also with that value 10 years ago, you could buy a lot more for that money."*³⁰

32. NFU Cymru told Members:

"we should be looking at how we can maximise funding and resource into Hybu Cig Cymru to support us in terms of achieving all those activities, and one of the benefits of potentially being owned by Welsh Ministers is that Welsh Ministers then should be able to put public funding into it. I don't believe that the organisation is completely sustainable purely on the levy. Historically, they received significant support from the EU rural development programme, as I mentioned earlier; when that's come to an end, we're not receiving that funding. So, I believe that if you look at Bord Bia in Ireland, and they came to present to our most recent NFU Cymru conference, and I think our members were extremely impressed, really, in terms of how they operate on that basis. So, I'd like to see us consider opportunities like that. And it is important we do that, because ultimately, we are

²⁸ Economy, Trade, and Rural Affairs Committee, 12 March 2025, Paragraph 10

²⁹ Economy, Trade, and Rural Affairs Committee, 12 March 2025, Paragraph 12

³⁰ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 125-126

competing in domestic and international markets with countries like that, who are significantly investing, putting public money into the marketing and promotion of their produce as well.”³¹

33. In their written evidence NFU Cymru said “The rationale for Welsh Ministers to own Hybu Cig Cymru is significantly weakened if Welsh Government do not feel it appropriate to provide funding to support activity to deliver against the objectives of the Red Meat Measure”³².

34. HCC told Members “ideally this organisation needs double the amount of money that it has to even have a chance to be relevant in tackling the scope that it has. Now, that is not possible. In an ideal world, I would advocate that it would say, ‘Well, if you want a model that could operate, basically, whatever the levy payer money, it should be compensated with funding from external sources in a similar quantum’”³³. They went on to say:

“If you look at the potential sources of where you could get the extra funding, they’re very limited. You could borrow from a bank, and we can’t do that. We can do our own activities, but we don’t have the scale to actually make the income from those activities to be enough to actually put enough money in the kitty, as it were, or we can try to get funding from the Government. So, you end up quickly going down that avenue.”³⁴

35. HCC did add “It’s absolutely fundamental and right that HCC looks for alternative funding sources, and it has been doing that, and it’s got a dedicated team that is looking towards alternative funding sources. The reality is that, in the current climate, those pots are finite, and they’re difficult to achieve”³⁵.

36. The Deputy First Minister’s paper said:

“We recognise the challenging financial situation for HCC due to a number of factors including a reduction in the red meat levy income and look forward to working with them as they develop their priorities

³¹ Economy, Trade, and Rural Affairs Committee, 12 March 2025, Paragraph 107

³² Written evidence, [NFU Cymru](#)

³³ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 313

³⁴ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 315

³⁵ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 318

through the Vision 2026 and build on its reputation of promoting the red meat sector.”³⁶

37. As discussed in the Future Strategy section of this report, the Deputy First Minister alluded to the idea of HCC receiving additional funding a number of times in his evidence session, should HCC’s new vision align with the Government’s wider objectives for the sector. He told Members:

“if you wanted a shorthand version of where the Government’s base is in terms of funding, potentially, going forward and so on, it’s actually building on what the red meat sector has done really successfully over recent years. The reputation is built on strong sustainability. So, it’s somewhere within that space, within SFS, within wider decarbonisation. Where’s the ask from HCC, to say, ‘We can actually deliver for you, not just the productivity and the valuable businesses and the processing sector and so on, but the strong sustainability piece around the red meat sector’? That has real potential.”³⁷

38. However the Deputy First Minister was clear the levy was important to him. He told Members: “The levy payer funding is always going to be critical, because that gives the responsiveness and the direct line of accountability through to the levy payers. It’s a levy payer organisation”³⁸.

Declining livestock numbers

39. Many stakeholders raised the declining livestock numbers in Wales and the resulting reduced availability of product for Welsh processors. Dunbia told Members “The decline in the sheep flock and suckler herd presents an alarming trend for the processing industry, which will have substantial repercussions in the coming months and years. Reduced availability of finished livestock means less product for processing and marketing, thereby risking the loss of established markets for Welsh Beef and Lamb”³⁹.

40. Kepak told Members:

“The fundamental issue at the moment is to look at and get industry, Government and HCC to work together to produce livestock. And I’m

³⁶ Written evidence, [Welsh Government](#)

³⁷ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 118

³⁸ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 105

³⁹ Written evidence, [Dunbia](#)

*not talking about maintaining numbers or declining numbers, but we're the most sustainable, or one of the most sustainable production systems in the world. ... we need to use the resources that we have as efficiently as possible, and by working together, I think, that brings everything together in a good way."*⁴⁰

41. HCC told members destocking was “the most fundamental problem that the industry faces by far”. The new Chief Executive of HCC said “when I started in the meat industry in Wales, there were 35 abattoirs in Wales; today, there are 16. If you look at the concentration of those abattoirs in particular, basically four of them, whether it’s in beef or lamb, they’re going to do about 80 per cent of the total throughput. So, that’s the description of it, whereas in the past it was more diluted”.

42. The UK Climate Change Committee (UKCCC) published its advice to the Welsh Government on Wales’ Fourth Carbon Budget on 14 May. The pathway (from 2025 to Net Zero by 2050) set out in the advice assumes cattle and sheep numbers to decline by 19% by 2033 compared to 2022.⁴¹

43. The UKCCC says the Welsh Government will need to support farmers to diversify away from livestock farming and towards woodland creation and peatland restoration. The advice acknowledges this will have “impacts on livestock farming and downstream businesses such as abattoirs”.⁴²

44. In his statement responding to publication of the advice, the Deputy First Minister said he would consider the UKCCC’s recommendations ahead of bringing forward regulations to set Carbon Budget 4 and the carbon unit limit for Carbon Budget 3 in law in the autumn. He said the Welsh Government will draw on the advice in developing its plan for meeting Carbon Budget 3, to be published before the end of 2026.⁴³

45. Giving evidence to another inquiry for this Committee the Chief Executive of HCC cautioned that destocking for environmental reasons would be a false economy. He told Members that the consumption of meat in Wales is likely to stay static so “what you are effectively doing is substituting local produce, local products, for imported raw material”. He went on to say:

⁴⁰ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 130

⁴¹ [TheUKCCC.org.uk Wales fourth carbon budget](https://www.theukccc.org.uk/wales-fourth-carbon-budget)

⁴² [TheUKCCC.org.uk Wales fourth carbon budget](https://www.theukccc.org.uk/wales-fourth-carbon-budget)

⁴³ [Gov.Wales Written Statement: Climate Change Committee advice on Wales’ fourth carbon budget \(2031-35\)](#)

*"we're very fortunate in Wales that we can actually produce livestock in a very environmentally friendly manner. Our numbers would indicate some of the top in the world, because of our weather, because of our grass, and all those things that have been mentioned before. But, actually, what we should be doing, in my view, is actually say, 'We'll take that as a starting point and develop the industry forward by making sure that we're actually increasing the productivity of those farms.' Because the moment you increase the productivity of those farms, as defined by the number of kilos per hectare, effectively you are being more friendly to the planet, and you are going to be more friendly to the planet than perhaps other places that we'll be importing meat from are or will be. And I think that would be a much more responsible position to take."*⁴⁴

Our View

We have heard many concerns that HCC is not resourced well enough to achieve all its aims. The starkest warning being from the Chief Executive – that he would need double his budget to deliver the breadth of the remit. This is clearly unsustainable, especially when considering the reduction in stock across Welsh farms. It is clear the Welsh Government and HCC need to either work out a way to increase HCC's funding or to reduce its focus to fit its current resources.

We have previously recommended the Welsh Government examine the English Smaller Abattoir Fund and to assess if a similar scheme might be beneficial in Wales.

If the Welsh Government chooses to provide HCC with additional funding to pursue additional policy objectives as suggested by the Deputy First Minister, the new objectives must fit within HCC's existing remit otherwise there is a risk of further overstretching the organisation. There is no point in paying a stretched organisation to take on additional responsibilities unless they add value.

Recommendation 2. The committee fully support the continued use of the statutory levy as a method for funding HCC, however the evidence received, including from HCC, was clear that levy income alone is not sufficient to cover the current remit and workload of the organisation. The Welsh Government should

⁴⁴ Economy, Trade, and Rural Affairs Committee, 2 July 2025, Paragraphs 101-102

set out how they intend to continue funding HCC or how they expect HCC to continue to operate financially.

Recommendation 3. It is evident that for HCC to fulfil its extensive mandate, additional funding will be necessary. The Welsh Government and HCC should explore all possible avenues to increase HCC's budget, including identifying work that HCC could perform to complement other Welsh Government policies and securing financial support from the Welsh Government for such initiatives. Furthermore, they should identify other funding sources that HCC could apply for including grants and possibly provision of services to other organisations. However, any increase in funding for HCC must be accompanied by enhanced accountability and performance measures.

Recommendation 4. In order to support both farmers' and processors' business planning, the Welsh Government should make its position on future livestock numbers clear. If the Welsh Government decides to support a reduction in livestock numbers, it should set out the anticipated impact of this on the processing industry and provide any support that may be required.

4. Leadership and staff morale

46. HCC has a turbulent recent history. Concerns have been raised in the media, on the floor of Senedd and directly with this Committee regarding the culture at the organisation. The media has reported on a ‘staff exodus’ and HCC have held a high-profile HR investigation into bullying within their organisation.⁴⁵

47. As mentioned above, this report is forward looking and it is not this Committee’s role to look into HR complaints or unpick previous HR investigations. However Members believe a healthy workplace culture is important to ensure HCC can succeed in their mission and good leadership is a key part of that healthy culture.

Problems with leadership

48. On 14 June 2024 the previous Chief Executive resigned from HCC following a long period of absence.⁴⁶ In October 2024 the Chair of HCC wrote to the then Chair of this Committee Paul Davies to set out the circumstances of his departure. The letter stated:

“Regarding the disciplinary process involving former HCC CEO Gwyn Howells, the Board of Hybu Cig Cymru unanimously accepted the recommendation of an independent disciplinary process that its former CEO, Gwyn Howells, would have been dismissed for gross misconduct had he not resigned.

Mr Howells resigned immediately prior to a disciplinary hearing, which followed a thorough investigation. Both aspects were conducted by specialist, independent HR experts who were supported by legal advice.

The Board decided that the seriousness of the matter necessitated that the disciplinary officer should be allowed to deliver a final report to conclude the process properly.

That report concluded that there was sufficient evidence of gross misconduct on three separate counts related to Mr Howells’ management and leadership.

⁴⁵ BBC.co.uk [Bullying claims at Welsh meat promotion firm](#), 8 February 2024;

Farmers Weekly [‘Toxic culture’ allegations rock HCC amid staff exodus](#), 25 November 2024

⁴⁶ Farmers Weekly [Former HCC boss ‘would have been sacked if he hadn’t quit’](#), 19 July 2024

The Board has accepted all recommendations from the specialist HR and legal advisors throughout the process.”⁴⁷

49. The letter went on to say HCC were “committed to reviewing all governance procedures” to allow the organisation to “continue to deliver, at the level of excellence levy payers expect”. They went on to say: “The Board have always been clear that our staff are our biggest asset and we are doing everything we can to support the health and wellbeing of our team”. The letter also explained that HCC were working with senior Welsh Government officials to recruit a new Chief Executive “swiftly”.⁴⁸

50. In their written evidence to this Committee Dunbia raised concerns about the impact of the former Chief Executive’s absence. They told the Committee “HCC’s ability to achieve its current priorities have been significantly impacted by the absence of senior leadership over the past 12-18 months”.

51. Dunbia said they had had “minimal engagement” with the interim Chief Executive and Chair and highlighted that “with a substantial number of executives, support staff and 2 key board members” departure from the organisation “the capacity of HCC to fulfil its priorities appears compromised”. They went on to say that, following the departures, HCC was “a significantly reduced organisation that appears rudderless”.⁴⁹

Staff morale affected but recovering

52. On 20 January 2025 HCC announced they had appointed a new Chief Executive, José Peralta. Mr Peralta was previously Chief Operating Officer of Puffin Produce, Pembrokeshire, and according to HCC, had “a wealth of experience having worked for over 25 years in the UK meat industry at Managing Director level”⁵⁰.

53. Whilst he caveated that he had only been in post for two months at the point he was giving evidence and his views were based on observations in that time, Mr Peralta told the Committee it would be naive to say staff morale had not been affected by the events of the previous 18 months and the negative attention that had attracted. However he said: “it’s remarkable that, under the circumstances, they actually had the output they had”⁵¹. He also told the Committee “the head

⁴⁷ Letter from the Chair of Hybu Cig Cymru to the Chair of this Committee, 21 October 2024

⁴⁸ Letter from the Chair of Hybu Cig Cymru to the Chair of this Committee, 21 October 2024

⁴⁹ Written evidence, Dunbia

⁵⁰ Meatpromotion.Wales, New CEO announced to lead Hybu Cig Cymru – Meat Promotion Wales (HCC), 16 January 2025

⁵¹ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 163

count reduction has not perhaps been as big as the perception is” stating that the current headcount was 29, down from a peak of 34.⁵²

54. Mr Peralta told the Committee that he had made morale one of his “first priorities” and that it was “getting better”. He explained that he had instigated monthly all staff meetings and one-to-one meetings with staff. He summed up the current position to the Committee saying:

“Is the morale low? Yes. Is it getting better? Absolutely. It is my determination to make sure that it gets better every day. But I believe that the best way to make sure that morale gets better is by two things: having a clarity of purpose, and the second thing is engaging with individuals.”⁵³

55. The Deputy First Minister told the Committee staff morale had been a constant theme of regular meetings between the Welsh Government and HCC. He said:

“Is it looking better, going forward? I will not be complacent enough to say everything now is completely hunky-dory, but what I can say is, with the appointment of the new board members that are in place, the new chief executive ... I think that is really stabilising things now, and that will have an effect on morale as well. ... it’s been a tricky 18 months, but it feels like now that it’s moving into a new phase, and I think that should be welcomed.”⁵⁴

56. The Deputy First Minister also listed some of the specific measures HCC has put in place to support staff:

- an employee assistance programme (counselling and support on personal and work matters);
- staff away days including opportunities for staff to raise issues with managers and peers;
- walk and talk sessions; and
- health and well-being support.

⁵² Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 168

⁵³ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 175

⁵⁴ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 18

57. The Deputy First Minister told Members “This is a relatively small team of people, but I think those sorts of inventions are seeking to turn around the challenges that we’ve seen in the last 18 months”⁵⁵.

Our View

At the outset we agreed this inquiry would be forward looking and make recommendations based around the future of HCC. We did not wish to unpick previous HR investigations. However, it is important that the future of HCC is built on a solid foundation and that solid foundation can only be created by an organisation with a healthy working culture and respect for its employees.

We were encouraged to hear about the interventions the new Chief Executive has implemented to improve culture at HCC. We look forward to hearing about progress on these actions and any further work undertaken to improve the culture of HCC in the long run.

Conclusion 1. A healthy and open corporate culture is important for the performance of any organisation as well as the wellbeing of its staff. The Committee welcomes measures implemented by the new Chief Executive and believes these must be followed up and maintained into the long term.

Recommendation 5. HCC should regularly report to the Welsh Government outlining progress on producing and maintaining a healthy corporate culture for the next three years. The Welsh Government should continue to monitor the culture at HCC and keep this Committee and its successor in the next Senedd informed on HCC’s progress in this area.

⁵⁵ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 26

5. Delivery against priorities

Is HCC delivering?

58. The Committee heard concerns that the impact of poor leadership, and skilled people leaving HCC, had had a negative impact on its performance. Dunbia told the Committee “HCC’s ability to achieve its current priorities has been significantly impacted by the absence of senior leadership over the past 12-18 months”⁵⁶.

59. Kepak told the Committee that HCC used to deliver a lot of programmes using EU funding however:

“that activity has dwindled, as European funds dwindled, effectively, and it hasn’t been replaced by any funding—no significant other funding—from other sources. So, that’s made it very difficult, you know. I used to work with HCC, and we had many programmes: the beef improvement project, £2.2 million over three years; the woodchip project; the electronic identification project. All these projects, you could see activity, and that gives you an opportunity to discuss other things on the farm as well, like promoting and what’s happening.”⁵⁷

60. HCC told the Committee it is “delivering good value for money for levy payers with a limited and dwindling budget for what is a broad scope”. In their written evidence they explained their activities are “multiple and varied” and supplied a long list of “the most relevant and impactful HCC activities between 2022-25” set out against the following “area of the supply chain” that they influence and support:

- farmers;
- processors and export sector;
- consumers and retails;
- policy and sustainability;
- health and education engagement; and

⁵⁶ Written evidence, [Dunbia](#)

⁵⁷ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 42

- communications.⁵⁸

61. In the evidence session HCC told the Committee:

“HCC has a business plan that it delivers for the programme for government, and it operates then a one-year cut as an operational plan, and, over the last 18 months, HCC has delivered on all of its key performance indicators and outputs. ... in terms of that strategic delivery against the vision, and how that has been implemented in the business plan, in its operational planning, those KPIs have been met.”⁵⁹

62. The Deputy First Minister told the Committee “there has been a relentless focus” on delivery and delivering KPIs “from the Chair, and now with the new Chief Executive in post as well”. He went on to say “So, we haven’t seen a dip in performance, we haven’t seen them take their eye off the ball”⁶⁰.

63. When the Committee discussed the evidence they had heard from Stakeholders about issues with delivery from HCC – outlined above – the Deputy First Minister said “from a sponsor and Minister’s perspective, we’ve kept a relentless focus on are they delivering, is their performance there, are they doing the major streams of marketing, promotion on behalf of the levy payers, are they attending the events and so on”. He highlighted HCC’s work “where they’ve had not just levy payer events to engage with levy payers, in the breadth, including processors, but also the wider public as well, because that is part of it as well, explaining what they do to the public. But they’ve also been on those specific missions to promote” and gave the example of working with the Dubai embassy to promote Welsh lamb in the United Arab Emirates and Saudi Arabia.

64. However, he went on to say:

“But if you’re saying to me, ‘Is it absolutely perfect? Have they touched every base?’, I don’t think any organisation can genuinely say that.”⁶¹

⁵⁸ Written evidence, Hybu Cig Cymru

⁵⁹ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 165

⁶⁰ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 12

⁶¹ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 15

Collaboration with other UK levy bodies

65. In their written evidence Dunbia told the Committee:

“The primary goals of HCC include promoting Welsh Red Meat both domestically and internationally and highlighting the dedication of Welsh farmers. Unfortunately, recent efforts have resulted in considerable duplication of tasks previously performed by other levy boards or major processors.”⁶²

66. The evidence given by levy payers broadly supported HCC working with other Levy Boards where appropriate. The FUW told Members “there are opportunities to use resources, combined resources, with other levy boards, such as the Agriculture and Horticulture Development Board and Quality Meat Scotland, to look at ways in which the UK can benefit from markets further afield across the globe, which then, of course, will encompass benefits for Welsh red meat”⁶³.

67. In their written evidence NFU Cymru also said co-operation between levy boards was important for efficiency. They suggested “We would consider that R+D, sustainability measures, climate change mitigation and campaigns to combat negative publicity about eating red meat and the impact of livestock production on climate change are potential areas where joint working would be beneficial”⁶⁴.

68. Kepak told Members “I’m sure there are opportunities to work on non-competitive areas with the Agriculture and Horticulture Development Board, for example—it could be finance, human resources, the red meat industry reputational protection. So, there are areas where that could be done, and, undoubtedly, cost savings”. They argued this would free up money for the organisation to meet the challenges that it has.⁶⁵

69. Kepak also highlighted innovative work in Ireland around sustainability that has stemmed from cooperation between their levy board (the Irish food and drink promotion board), Teagasc (the Irish Agriculture and Food Development Authority) and the Irish Government. They told Members this could be replicated in the UK via co-operation between Levy Boards and Government:

⁶² Written evidence, [Dunbia](#)

⁶³ Economy, Trade, and Rural Affairs Committee, 12 March 2025, Paragraph 35

⁶⁴ Written evidence, [NFU Cymru](#)

⁶⁵ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 138

"If you look at AgNav, what they have in Ireland, looking at the way that they're increasing sustainability activity, and measuring it and baselining it and stuff, we're way behind. If you process an animal in Ireland, you know the carbon footprint. Now, we don't have that ability. We need to get ahead of the game, really, and that's something that has been lacking."

"At the moment, individual processors are doing their own thing, and that's not going to be sustainable, and probably Government needs to come in. And what you have in Ireland is Teagasc and Bord Bia working together with Government to deliver these projects, which is missing at the moment. And probably those kinds of things needs to be done across England and Wales, not just in Wales, because it's not competitive when it comes to climate change and sustainability."⁶⁶

70. HCC told Members they already cooperated with other Levy Boards in non-competitive areas. They told Members:

"there's a significant work stream on collaboration with other levy bodies, UK-wide and GB-wide, on non-competitive areas. The organisations meet across the year in all four nations, and we talk about what are the priorities for the sector in that context, how do we work together, what are the non-competitive areas—so, advocacy, defence, nutrition, environment, policy and data for trying to shape policy in a productive way that keeps farmers farming."⁶⁷

71. They went on to give some more colour to this cooperation saying:

"there are quarterly meetings that happen between CEOs and chairs on those levy bodies, and I'm including all of them, including Northern Ireland. We're now going to start to move into monthly meetings of let's call it less senior staff, including me, to make sure that we have that alignment to actually be more constant, rather than just waiting for a quarterly meeting. Second, I can give you some examples, but I'll use one that is very active today. We're about to embark on a baselining of the carbon footprint of farms across the UK, basically studying the carbon footprint of 68 farms across the UK, of which we

⁶⁶ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 148

⁶⁷ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 227

in Wales, HCC, wanted to support and do eight. And that's done in collaboration with the Agriculture and Horticulture Development Board.”⁶⁸

Farming Connect

72. The Committee heard evidence about HCC's relationship with Farming Connect. The National Sheep Association told the Committee: “Regarding the work on ‘best practice’, Welsh farmers benefit from the government-funded Farming Connect (FC) programme, and would question if there is duplication in the knowledge transfer (KT) effort or confusion as to where responsibilities lie”. They went on to say they understood there is a strained relationship between the two however, “Previously, HCC and FC enjoyed a closer working relationship. A return to this would be of great benefit to the industry”.⁶⁹

73. NFU Cymru told Members a lot more collaboration could take place between HCC and Farming Connect. They said:

“you almost see competition between them and duplication. I think it goes back to when they were probably competing for funds under the historic EU rural development programme. We can't afford that any more. We've got to make sure that they work together. They do work together on some things, but I think, at a very senior level, Hybu Cig Cymru and Farming Connect need to be meeting regularly. I would see, with my simplistic terms, Hybu Cig Cymru providing the technical and scientific expertise, and Farming Connect using their expertise in terms of knowledge exchange and knowledge transfer to deliver that on farm.”⁷⁰

74. In their written evidence HCC told Members they had been building a closer relationship with Farming Connect. Specifically they said:

“Over the past five years HCC has sought to develop a closer working relationship with deliverers of the Welsh Government funded Farming Connect programme. This has led to HCC presenting at a number of Farming Connect events and meetings. In the autumn of 2024, HCC attended and had information available at each red meat ‘Our

⁶⁸ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 228

⁶⁹ Written evidence, [The National Sheep Association](#)

⁷⁰ Economy, Trade, and Rural Affairs Committee, 12 March 2025, Paragraph 143

Farms' events organised by Farming Connect. HCC also has a strategic input and overview on the programme through its presence and representation on the Farming Connect Strategic Advisory Board.”⁷¹

75. In their evidence session HCC built on this saying they were trying to work smarter with a diminishing budget and as part of this they had been working with Farming Connect. They said Farming Connect “have a roadshow of events put on every year, and, in 2024, HCC went along to those as speakers and as supporters. And it was an opportunity to engage through the Farming Connect programme, through their wide network, to talk about the work that HCC does—not duplication, not additionality of events, not duplication of levy spend, which is really important, but using those keynote events, working in collaboration, but talking about HCC delivery”.

76. The Deputy First Minister told Members he thought HCC’s relationship with Farming Connect added value not created duplication. He said:

“So, where they see the opportunity to get the red meat priorities in there, in a space, with Farming Connect or with others, I think that probably adds value, rather than duplicates. They’re arguing HCC objectives, HCC imperatives, but they’re doing it, they’re looking for the opportunities there with Farming Connect and with others to make their voice heard.”⁷²

HCC’s working relationship with the Welsh Government

77. Kepak highlighted the importance of the relationship between the Welsh Government and HCC. They told Members it was important HCC had a good relationship with politicians and Government as well, and civil servants. They explained:

“it’s just as important to have relationship with. I think, in the past, if I use my own experience, we delivered schemes on behalf of the Welsh Government and worked jointly together. Perhaps those opportunities should be looked at again, and especially if there was any crisis; Government would turn immediately to the levy board to help that, whatever the issue was. And it’s not about HCC lobbying

⁷¹ Written evidence, [Hybu Cig Cymru](#)

⁷² Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 124

Government—that's not what I mean; that's the jobs of the unions. But it's to provide facts, advice—and sometimes it's difficult, because one thing doesn't benefit the whole industry; you need to have a balance—and I think that's probably an area where you need people to do that, and at the moment, we probably haven't got the people to do that in numbers.”⁷³

78. HCC told Members they had a healthy relationship with the Welsh Government, but the new Chief Executive felt it could still be developed. He told Members:

“I've found the Welsh Government very engaging. I've found our relationship with the Welsh Government—the one I've had so far—incredibly helpful, co-operative and listening. And that's the truth, as an external observer until now, from the point of relationship. Can we do more? Of course we can, and we're working.”⁷⁴

79. HCC went on to say:

“The relationship with civil servants is very good, very strong. There's a lot of work to do at the moment on behalf of the industry, and it's in the spirit of collaboration, and that collaboration is very strong. I think an interesting thing that we are considering as part of the vision is what engagement we can do politically in that sphere, and maybe there is a sponsored event that is required so that we can get that wider engagement with all politicians and all parties to ensure that you get the opportunity to share your views and have those wider conversations. And, more broadly than that, the HCC door is open, the phone is always on and we always welcome having those conversations.”⁷⁵

80. The Deputy First Minister told the Committee: “my officials at a senior level lead, on a quarterly basis, regular meetings with HCC as well. For those people who don't understand the nature of HCC and our relationship, they are, of course,

⁷³ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 62

⁷⁴ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 308

⁷⁵ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 309

a levy-funded board, but they work with the grain of Welsh policy framework as well”⁷⁶.

Our View

HCC has a very wide remit, however as its budget has been reduced the evidence received indicates stakeholders feel its output has reduced too. We believe that, unless they decide to put more money into the organisation, the Welsh Government should work with HCC to establish new KPIs that are achievable within its budget. These KPIs must be clear, have measurable outcomes and both the KPIs and progress against their delivery must be transparently shared. When developing KPIs HCC and the Welsh Government must take levy payers’ needs into account.

We were interested to hear about the work HCC undertakes with other levy boards and Farming Connect. Whilst they all have defined roles and there is of course a certain amount of competition between levy boards, this is an area the Committee would like to see built on. We would like to see more joint working between HCC, other levy boards and possibly Farming Connect to minimise duplication of effort and achieve economies of scale. We believe this could free up resources which would be used to pursue the core aims of HCC and, if done correctly, could create greater impact and wider reach. Members believe it is important this extends beyond information sharing and joint meetings and could include sharing resource, joint procurement or even merging back-end functions.

Recommendation 6. HCC has a very wide remit, however the Committee believes HCC must focus its work to match its reduced budget. To achieve this the Welsh Government should agree new, measurable and transparent KPIs with HCC. Progress against these KPIs should be regularly measured by the Welsh Government and the outcome of that review should be published in a manner that is clear and transparent to levy payers and other stakeholders. The new KPIs should include indicators which:

- Set clear expectations around engagement with stakeholders and levy payers including meeting levy payers where they are and ensuring clear visibility and accessibility of HCC staff including senior leadership;

⁷⁶ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 10

- Ensure best value for levy payers and any additional public money HCC may receive; and
- Ensure strong outcomes from promotional activities which is measured in a clear and open way.

Conclusion 2. The Committee was pleased to hear HCC is working with other Levy Boards in non-competitive areas and with Farming Connect. The Committee believes these efforts should be increased to maximise joint impact, ensure duplication of effort is minimised and to support levy payers and stakeholders' engagement with HCC.

Recommendation 7. The Welsh Government should undertake a review to identify areas where HCC could increase joint working and/or resource sharing with other levy boards and other relevant devolved organisations such as Farming Connect. This should include looking for areas where they can minimise duplication of effort and take advantage of potential economies of scale. The purpose of this review should be to identify areas where savings could be made which can be reinvested into HCC's core business of promoting Welsh meat and developing the red meat sector. This review should not be limited in scope and must extend beyond simple information sharing to aspects like joint procurement and sharing back-office functions.

6. Relationship with levy payers

HCC's engagement with farmers

81. The Committee heard concerns about how HCC engage with levy payers. Both Farming Unions felt this was an area that could be improved.

82. In their written evidence the FUW told the Committee:

*"[FUW members] recommended that HCC made itself visible and available in less formal settings, such as livestock markets, to ensure that all levy payers had ample opportunity to personally engage, develop their knowledge and understanding of the work that is undertaken by HCC and offer honest feedback to HCC staff and representatives."*⁷⁷

83. NFU Cymru told Members while HCC has a good relationship with their Livestock Board HCC "don't quite have that relationship" with people "on the ground". They went on to say "in terms of increasing the visibility in places like livestock markets. They do often hold meetings to share what they're doing, but they're not often the most well attended, so maybe, again, they need to look at things like that"⁷⁸.

84. NFU Cymru told the Committee that, whilst information was available about "how HCC use their money and where it goes" in their annual report, "you have to go quite deep into the website to find that". NFU Cymru suggested:

*"As unions, each and every year, we rely on our members to voluntarily pay a subscription to us, so we're continually highlighting the work that we do to justify that payment. I think HCC need that same mindset in terms of levy payers and being able to justify to them how that money is spent, and that they are getting a return on that investment to ultimately improve the viability and profitability of their businesses."*⁷⁹

85. The Welsh Livestock Auctioneers also supported calls for a physical HCC presence at markets. They told Members: "Whilst costly in time and resources, it is

⁷⁷ Written evidence, FUW

⁷⁸ Economy, Trade, and Rural Affairs Committee, 12 March 2025, Paragraphs 46-47

⁷⁹ Economy, Trade, and Rural Affairs Committee, 12 March 2025, Paragraph 55

widely accepted that in-person communications are most effective in rapidly growing support and understanding. The WLAA and its members would welcome the presence of HCC representatives within their livestock markets and believe this would in turn provide great value and opportunity for HCC to engage with levy payers, including the ‘hard to reach’.⁸⁰

86. HCC told Members they thought collaboration with levy payers was important and gave the example of their annual roadshow. They said the focus of the roadshow was “slightly different. So, in 2024, we had a roadshow of farmer forums. The purpose of that was about engaging in what we are delivering and for farmers and levy payers to be able to engage with HCC on what we’re delivering and ask any questions that they wanted to. So, that’s an example from 2024. In 2025, one of José’s first jobs was to engage on part of a processors and butchers clubs roadshow, which, again, was exactly the same. And the focus was on what HCC is delivering, the ability to ask any questions and also feed into what those stakeholders and levy payers needed, going forward”. They went on to say that as a small team, “you can’t be everywhere at all times”.

87. They also mentioned they now had “an agreement with the Livestock Auctioneers Association that, in key markets, at key times of the year, HCC staff would be present. It isn’t possible to be at every livestock market every week, across Wales, but in key markets and key times, HCC staff will be there”.

88. The Welsh Government told the Committee it had set KPIs for HCC relating to engagement. They said:

“when we have the quarterly governance meetings, which are between officials and HCC, we look at the range of KPIs, including on engagement, and one of the discussion points that we’ve had very recently is around that feedback that’s come through from some levy payers, that perhaps they’ve been less visible in places like markets, et cetera. So, that is one of the things that HCC are now looking at, about how they can increase some of that visibility”⁸¹.

89. They went on to say that the interim Chief Executive had been “forced” to largely concentrate on internal work due to the recent issues at the organisation. However, they told Members “having the new chief executive in place is really

⁸⁰ Written evidence, [Welsh Livestock Auctioneers’ Association](#).

⁸¹ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 37

helpful” and “having a bit of a step change with a new CEO, who is very visible himself, I think that is all part of increasing that engagement”⁸².

Engagement with processors

90. Kepak suggested HCC should carry out more engagement with abattoirs. They told Members: “It depends on your definition of ‘large’, but there are about four large abattoirs in Wales, processors, which also debone and pack as well—some do and some don’t. You know, regular visits to those sites wouldn’t be too much to ask, I think”⁸³.

91. The new Chief Executive of HCC told Members his “day 3 was phoning all the different stakeholders and people that participate, including processors, to try to line up meetings. And since then, I’ve been trying everything I can to actually meet with them, and I’ve met with a lot of them”⁸⁴. When asked about evidence the Committee had received showing the relationship between HCC and stakeholders was strained and engagement interaction with processors has been lacking, he said this was something he would be rectifying.⁸⁵

Our View

We heard some real concerns from levy payers about how HCC engage with them. No doubt the turmoil that has beset the organisation recently has not helped this situation. However, it is clear increasing engagement, and so levy payer confidence in HCC, needs to be a priority. We also agree with the view that HCC should be paying regular visits to the small number of large abattoirs in Wales.

We were pleased to hear the Chief Executive has committed to deepening engagement with the sector. To ensure he succeeds in this aim he must ensure he, and his team, are speaking to the full breadth of levy payers and meeting them where they are. We believe engagement with the sector should be a key KPI and a key element of their new Vision 2030.

Conclusion 3. The Committee was pleased to hear work on this is underway to improve HCC’s engagement with stakeholders. HCC must strengthen its communications and engagement with levy payers. To achieve this HCC must

⁸² Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 37

⁸³ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 36

⁸⁴ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 204

⁸⁵ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 206

meet levy payers where they are e.g. attending livestock auctions and visiting abattoirs.

7. Promoting red meat

The impact of HCC's work at events

92. In its written evidence Dunbia raised concerns around the impact HCC had made with its work on events:

"HCC marketing budgets have often been allocated to events that have made little or no impact on red meat sales, suggesting that these funds could be better utilised in more established markets where Welsh Lamb and Beef are already recognised."

93. HCC told the Committee that for international events, "the measure that we follow to understand international events is the number of contacts achieved and the potential of those contacts. Potential is based on asking those people that contact us in those events, 'How much meat do you buy?' and that will give you a sense of the scale of what we have"⁸⁶.

94. They gave an example of "the Gulfood exposition in one of the Gulf countries, we did achieve about 49 contacts, and more importantly, in this example in particular, which is good news, one of those contacts has resulted in business right away, i.e. we're now actually one of the processors who is listed with an online retailer in the United Arab Emirates, which is something that had not happened previously"⁸⁷.

95. They also highlighted:

*"At those international events, it isn't just about creating new opportunities. In those markets there are existing clients, and client maintenance is incredibly important, and you can't do that unless you're there and present and having those conversations."*⁸⁸

The impact of promotional activities and marketing campaigns

96. When asked about how it analyses value for money and the impact of the activities that it carries out, HCC told Members:

⁸⁶ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 224

⁸⁷ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 225

⁸⁸ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 226

“the difficulty we have is we don’t sell things, so I don’t have a ledger to actually compare one to the other, which is one of my frustrations, but it is what it is. The reality is that the activity that we undertake is always to increase the perception of the brand, and it’s always to increase the propensity to purchase. Now, having more foothold, i.e. more people walking through the stores, is by definition going to effectively have more people buying. If you ask me how many, I can’t tell you.”⁸⁹

97. When asked about the use of proxy measures, the Deputy First Minister gave an example where HCC had worked with Sky and a supermarket to measure results. He said:

“They did it via loyalty cards and Sky Adsmart, and the campaign was to target ... specific households who had not purchased Welsh lamb brand over the previous six months there. So, the growth secured from this directly was an increase in sales of 24 per cent in Wales, 21 per cent in England. Fifty per cent of that growth was secured from consumers that had previously been purchasing from rival competitive brands outside of Wales. So, I think it’s those sorts of proxy indicators that give us the confidence that they’re doing the right thing.”⁹⁰

Is HCC a strong advocate for the industry?

98. In their paper *Kepak* suggested a key role of a levy board is to:

“communicate the good work being done by farmers, generating respect for the sector and helping Government to understand the key role that livestock farmers in Wales play. This communication work has been successful in lamb, but less so for beef where global issues relating to sustainability have highlighted the lack of understanding in this area.”⁹¹

⁸⁹ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 212

⁹⁰ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 28

⁹¹ Written evidence, *Kepak*

99. The Farming Unions echoed some of these concerns. When asked if HCC had been playing it safe instead of truly advocating for the red meat sector NFU Cymru said:

“I think in terms of ‘The Welsh Way’, the document they produced back in 2021 or so, in terms of sustainability, I think that really gave us a platform where we could really push and move on. I’m not saying it’s necessarily playing safe as such in terms of what it’s done. It has been an extremely challenging and turbulent time in terms of marketing and promotion. For example, if you just look at the UK market, COVID and such saw fundamental changes, really, in terms of the way that consumers buy and purchase meat. The food service sector was huge in terms of added value pre COVID, but now you’re seeing a lot more return to supermarkets and people buying and dining out at home as such, really.”⁹²

100. NFU Cymru went on to explain: “we’re all sure that we have got the most high-quality, environmentally friendly, climate-friendly food in the world, and we see huge opportunities for that, and we want to make sure that we are really maxing out in terms of that. But it is a constant battle, really, in terms of having that necessary funding to be able to achieve absolutely everything that you want to achieve”⁹³.

101. FUW highlighted a number of challenges facing the industry saying “pressures to reduce meat intake, for example, environmental demands, land use demands—. The number of challenges facing the red meat sector is increasing because of the way in which policy development is going”⁹⁴.

102. In response to claims HCC hadn’t been fighting the corner for red meat producers in the way it had in the past they told the Committee:

“... vision of HCC is one that actually works on behalf of the industry ... as a conduit to not only help develop the industry and promote the product, but also to influence the powers that be and inform the powers that be what the effect of potential policies could be. So, I’m a very strong defender of the industry.”⁹⁵

⁹² Economy, Trade, and Rural Affairs Committee, 12 March 2025, Paragraph 77

⁹³ Economy, Trade, and Rural Affairs Committee, 12 March 2025, Paragraph 79

⁹⁴ Economy, Trade, and Rural Affairs Committee, 12 March 2025, Paragraph 81

⁹⁵ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 109

103. They also highlighted the work they had been doing on the sustainable farming scheme ministerial round-table and the carbon sequestration review panel as “a key area where HCC has spent days and days and days in meetings, in consultation, to actually demonstrate both the worth of our industry, the value of our industry, but also the really difficult and complex environment that will materialise if we don’t get this balance right going forward”⁹⁶.

Our View

We are concerned that not all stakeholders have faith in the effectiveness of HCC’s promotional activities. We were also concerned that a lot of the evidence provided showed measures of HCC’s actions but not the specific outcomes e.g. not if and how it had increased sales of Welsh red meat.

As red meat promotion is the core aim of the business, the Committee believes HCC must work harder to ensure it can evidence the impact it is having. We were interested in the example described by the Deputy First Minister where HCC had used supermarket loyalty card data to analyse a campaign’s effectiveness. Further work of this kind could help HCC understand and hone its impact and strengthen industry confidence in HCC and their methods.

Welsh meat is well regarded for both its welfare standards and sustainability. We feel this is an area HCC should be pursuing and promoting more actively.

Recommendation 8. HCC must ensure it is measuring the impact of promotional activities through tangible and comparable data which will show outcomes not just activities. One option to achieve this would be building on the work it has done with retailers on the use of loyalty card data to understand the direct impact of their work. The details of this measurement and the outcomes should be communicated clearly and openly to levy payers.

⁹⁶ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 243

8. Future Strategy

104. HCC's website explains:

"HCC's strategic purpose and priorities, underpinned by the Red Meat Industry (Wales) Measure 2010, is established from its 'vision' document. This is an important document that sets the foundations to build the future of the industry and acts as a blueprint for HCC to support and unite all elements of the sector and supply chain."⁹⁷

105. The website goes on to explain Red Meat Vision for Wales⁹⁸ was developed with the industry and runs up to the end of April 2026, in line with the Senedd term.⁹⁹

106. HCC are currently developing their next Vision document – Vision 2030. HCC have started consultation with a survey. As part of the launch of the survey the Chief Executive said:

"As we look towards the culmination of the current vision, we must also plan for the next. I have met with a number of key stakeholder groups in recent weeks to start this important discussion. The survey is the next step to gather industry views on the industry's challenges and priorities, and what HCC can do to support it.

Our survey will form part of a wider engagement plan delivered throughout 2025, which will include meetings and HCC attendance at livestock markets and events, the first being NSA Welsh Sheep this week [Wednesday 21 May] at Tregoyd Farm, Brecon. We would ask levy payers to come and talk to us at forthcoming events, or fill the online survey to make your views heard. It is vital that stakeholders from across Wales contribute to the process so that HCC is fully informed of the complex challenges within our industry."¹⁰⁰

⁹⁷ Meatpromotion.wales [Vision 2030](#)

⁹⁸ Sometimes referred to as Vision 2025

⁹⁹ Meatpromotion.wales [Vision 2030](#)

¹⁰⁰ Meatpromotion.wales [HCC seeks industry input for future vision](#)

107. HCC have stated: “Vision 2030 will be published by the spring of 2026 following agreement from the HCC Board and approval by the Cabinet Secretary”¹⁰¹.

108. The Committee took its evidence before the HCC launched its engagement work on Vision 2030. It heard calls to ensure that there was a proper consultation as part of the process. The FUW said:

*“hopefully they’ll consult with industry bodies and levy payers now throughout that process. And as I said earlier on that, to us, is crucial, to get the levy—to rebuild this relationship, really, between the levy board and levy payers so that, for the next five years, we’re all working towards the same goal. And keeping that relationship going throughout that process will be crucial, rather than doing a process of six months’ consultation, for example, to come up with a vision and then seeing a dip; it’s got to be a continuous conversation.”*¹⁰²

109. NFU Cymru said:

*“it is a really opportune time for HCC to come out to the industry to discuss their priorities for the coming years and, really, for our members who are levy payers to be able to strongly input and, hopefully, shape that new strategic vision going forward, because, as we’ve both alluded to, the challenges at the moment are immense for the red meat industry. And whilst there are challenges, we think that there are great opportunities for the Welsh red meat sector as well, and we’ve got to make sure that we capitalise on those and improve productivity and efficiency on farms in Wales, and really build and grow markets that we’ve got at home and abroad for PGI Welsh beef, lamb and pork.”*¹⁰³

110. Kepak also urged HCC to hold a proper consultation. They told Members that HCC should be consulting with “the farming unions, the processing sector, they’ve all got representative organisations, but it’s as easy as holding a meeting and engaging and talking to people, and quite often, those golden nuggets come from people that you don’t think of, really, that would bring those things up”¹⁰⁴.

¹⁰¹ Meatpromotion.wales [Vision 2030](#).

¹⁰² Economy, Trade, and Rural Affairs Committee, 12 March 2025, Paragraph 84

¹⁰³ Economy, Trade, and Rural Affairs Committee, 12 March 2025, Paragraph 86

¹⁰⁴ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 57

111. However they also cautioned against over promising, saying “HCC has is very wide, and if you compare that with the resources available at this point in time, and the funding available, I would question whether that’s possible to deliver”¹⁰⁵. They went on to say “There’s no point having a gold-plated vision if there’s no hope of ever delivering it”¹⁰⁶.

112. The Deputy First Minister stressed the importance of HCC developing its new vision and that potential funding opportunities from the Welsh Government could flow from that. He suggested that:

*“HCC will feel, on the back of getting the vision statement right and getting the framework of operation between us and Government, compelled to come back to us and to say, ‘Part of those wider imperatives around sustainability in the red meat sector, that’s your role, Welsh Government. We need to be working with you on it and to come back in terms of funding.’ But I don’t want to pre-empt that because I think that work needs to be done now in the months ahead”.*¹⁰⁷

113. He went on to say:

*“... I think we need to get the two together. Get the vision set out of what they’re going to do in the years up to 2030, define that in what their operational approach will be with that, and then that allows us to get into a discussion with them to ask, ‘What role does Welsh Government have within this?’ And there are ways in which they can do this.”*¹⁰⁸

114. An official accompanying the Deputy First Minister also suggested HCC might have a role in delivery of the SFS saying “the space that I think is the most interesting is what is that network of support and delivery that’s going to be needed for the sustainable farming scheme. We know that there’s going to be a lot of advice and guidance that’s going to be needed for the farming industry. We know that there’s going to be work that’s going to be needed that links up the sustainable farming practices with the Welsh food and drink brand. It’s those sorts

¹⁰⁵ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 53

¹⁰⁶ Economy, Trade, and Rural Affairs Committee, 27 March 2025, Paragraph 55

¹⁰⁷ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 105

¹⁰⁸ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 109

of areas that we'd be very interested to hear from HCC about as part of the engagement they do for developing the new vision".¹⁰⁹

Our View

The Welsh Government must work closely with HCC to develop its new vision. This must include developing strong KPIs, ensuring HCC is making a clear and obvious difference and that it is producing value for money to levy payers. HCC's consultation must be as inclusive as possible. It must ensure it takes stakeholders' needs into account when engaging with them and HCC must meet stakeholders where they are, and not expect them to come to HCC.

Recommendation 9. The Welsh Government and HCC must ensure industry voices are well represented in their work to update the HCC Framework Agreement. To achieve this the Welsh Government must consult with industry 'where they are' to ensure it is hearing all voices, not just those who have the time and ability to easily engage with the Welsh Government.

¹⁰⁹ Economy, Trade, and Rural Affairs Committee, 7 May 2025, Paragraph 106

Annex 1: List of oral evidence sessions

The following witnesses provided oral evidence to the Committee on the dates noted below. Transcripts of all oral evidence sessions can be viewed on the Committee's website.

Date	Name and Organisation
12 March 2025	Dylan Morgan, Head of Policy, National Farmers' Union Cymru (NFU) Gareth Parry, Head of Policy, Farmers' Union of Wales (FUW)
27 March 2025	Prys Morgan, Procurement Director, St Merryn Merthyr, Kepak José Peralta, CEO, Hybu Cig Cymru Catherine Smith, Chair, Hybu Cig Cymru
7 May 2025	Huw Irranca-Davies MS, Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs, Welsh Government Gian Marco Currado, Director - Rural Affairs, Welsh Government

Annex 2: List of written evidence

The following organisations provided written evidence to the Committee. All written evidence and additional information can be viewed on the Committee's website.

Written evidence

Organisation	Meeting date
National Farmers' Union Cymru (NFU)	12 March 2025
Farmers' Union of Wales (FUW)	12 March 2025
Dunbia Llanybydder	27 March 2025
Kepak	27 March 2025
Hybu Cig Cymru	27 March 2025
Welsh Government	7 March 2025

Additional Information

Organisation	Date
Welsh Livestock Auctioneers Association Limited (LAA)	11 March 2025
National Sheep Association (NSA)	11 March 2025
Association of Independent Meat Suppliers (AIMS)	13 June 2025