

# Knowing Your Market

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**meatup**  
FORUM

  
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MEAT & LIVESTOCK AUSTRALIA

# Supply Chain Overview

## Four plants strategy located in South Australia, Victoria & NSW

- 70 to 80% bought privately through Agents & direct from Producers
- 20 to 30% Markets
- Develop alliances with key agents and producers (win-win)
- Early Forward Contract release
- Consistent supply arrangement with key clients both grain and grass product



# Lamb & Mutton

- Lamb Specifications
  - Wt: 16-34kg (Ideally 20-28kgs)
  - Fat: FS 2-5
  - Breed Types XB, Merino, Dorper “Cleanskins”
- Mutton Specifications
  - Wt: 16kg+ (Ideally 20-32kgs)
  - Breed Types XB, Merino, Dorper “Cleanskins”



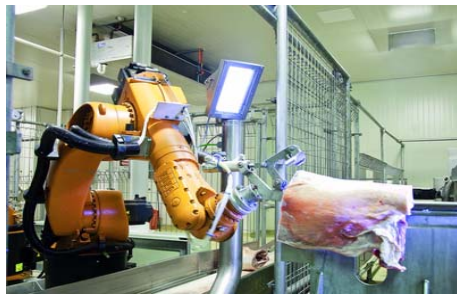
# Goats

- 6.1kg+
- Major market, North America
- Consumed by Hispanic population
- The benefits of exclusion fencing and improved genetics



# Technology Investment at TFI

- **TFI is investing heavily into technology to increase value along the supply chain**
- All plants have installed RFID readers on the small stock chains to improve producer feedback
- Automated lamb cutting (Tamworth) to maximise yields on high value cuts and capture the full value in every lamb carcase



# Value based payment system? Positive or Negative?

## Positives

- Producers will get payed for what they produce
- Increased producer feedback on individual lambs
  - Producers will be able fast track genetic gain by targeting high performing sire lines
  - Ability to highlight non performing breeders
  - Help lot feeders target clients which have lambs that perform on feed plus hit the grid!!

## Negatives

- Producers will have to sell stock when they are ready and not let them get to heavy or to fat
- It will favour producers which have put greater importance on genetics
- It will favour producers which have ability to monitor stock more closely

# Markets, Products & Major Customers

- Export Markets
  - 80% Export
  - 20% Domestic
  - 80 Countries
  - USA, EU, Japan, Korea, Middle East, China, Russia, South Africa

**TESCO**

**SAFEWAY**

*Wegmans*

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**Woolworths**  
the fresh food people

**McDonald's**  
i'm lovin' it

**BURGER KING**

**COSTCO**  
WHOLESALE

**coles**

**ASDA**

**ALDI**

- Chilled Lamb
- Chilled Beef
- Mutton
- Offal's
- Skins & Hides
- Value Added Items
  - Sausages, Hamburgers
  - Case Ready, Portion control
  - Marinating and Injecting

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# Opportunity for Rangeland beef, lamb & Goat markets

- The rangelands will become to breeding factory for both sheep and goats
- Focus on improving lambing and percentages
- Develop supply chains and relationships with processes and lot feeders.





# Take home messages

- Focus on breeding the best possible animal for your environment
- Try and improve lamb and goat percentages
- Develop relationships with lot feeders and processors
- Understand what your target market

