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Working Party on Agricultural Quality Standards

Specialized Section on Standardization of Meat

Twenty-fifth session

Geneva, 29-31 August 2016

Report of the twenty-fifth session of the Specialized Section on Standardization of Meat

I. Introduction

1. The 2016 session of the Specialized Section on Standardization of Meat of the United Nations Economic Commission for Europe (UNECE) included on its first day a seminar entitled “Meet/Meat 2016 updates” which focused on trends in international meat markets (focus Asia), international standards (sustainability, animal welfare and eating quality) as well as electronic certification (e-SPS) for meat trade. The seminar which was opened and chaired by Mr. Ian King, Chairman of the Specialized Section, brought together experts from all over the world.

2. In summary: The world market in meat is currently growing at about 3 per cent per year, with per capita consumption increasing, in particular in developing countries. Poultry has experienced the quickest growth, at nearly 5 per cent, followed by pork. This trend is expected to continue and, by 2020, poultry is expected to be the most consumed meat across the world. There has also been a sharp rise in trade with Asia. Meat imports to the region have grown from 22 per cent in 2005 to 42 per cent in 2015, with China accounting for the bulk of that growth. Exports by China have also increased from 9 per cent to 22 per cent. Asia also accounts for 2/3 of global imports of offal. Consumers are switching to cheaper meat, and the growing number of “flexitarians” presents a challenge for growth in meat trade. The amount of meat sold that is labelled under quality assurance schemes is growing in developed markets and, in particular, “organic” is expected to continue to grow. Electronic certification systems are starting to be implemented also for meat, with large meat exporting developed countries at the forefront. The Netherlands has for example implemented an e-SPS system covering meat exports to China which has streamlined the issuing of such certificates. On the standards front, the number of sustainability standards continues to grow with broadly over 400 sustainability standards covering the agricultural sector. The plethora of overlapping standards adds complexity and cost, as in many cases farmers are required to comply with more than one. Farmers and agribusinesses complain

of audit fatigue, with some farmers being audited as many as 16 times per annum. Hence, the International Trade Centre (ITC) and GS1 have been working on the introduction of the Sustainability Network and the GS1 Global Farm Registry to help simplify the process of reporting and sharing sustainability compliance information. The first standard/technical specification for animal welfare of the International Organization for Standardization (ISO) was adopted in July 2016 and will be published in December 2016 (ISO TS 34700). It fully builds on and provides a mechanism to ensure adherence to the standards on animal welfare of the World Organisation for Animal Health (OIE).

3 Eating quality was discussed both at a rapporteurs meeting and at the seminar. Presentations on the current status of meat eating quality research included the camera-based technology of the United States (adopted in 2009) to assist in the assignment of quality grades to beef carcasses. That technology had significantly modernized and improved the United States beef grading system and increased consistency in grading and prices. A presentation on the Irish beef genomic scheme focused on breeding more profitable, sustainable and carbon-efficient cows. The results suggest that meat eating quality can be improved by breeding/genetics. The outcome of recent eating quality workshops in Paris and Milan had concluded that quality was achievable if every link in the supply chain was focused on the end result, i.e. a satisfied (and thus repeat) customer. The Meat Standards Australia (MSA) grading had led to substantial price increases delivered back to farm gate, and the MSA index provides a tool that measures eating quality over time. MSA science findings will be used to describe “fit for purpose” for all MSA cuts, allowing for greater carcass utilization.

4. The seminar’s programme and the presentations are available on <http://www.unece.org/index.php?id=41423#/>.

5. Mr. Ian King (Australia) also chaired the formal part of the session on 30 and 31 August 2016. The Chief of the UNECE’s Market Access Section, Mr. Mika Vepsäläinen, opened the meeting stressing the importance of the seminar in bringing to the attention of participants, key issues influencing future trade for meat products. He thanked all regular and new delegates for their attendance and support noting that the Specialized Section had over many years contributed in a meaningful way to the facilitation of the trade in meat products particularly through its excellent pool of experts representing all stakeholders involved. He also noted the special session on eating quality and welcomed the progress and commitment to this new topic as well as the on-going discussions on potential links between eating quality and the work of the Specialized Section. As was highlighted at the seminar, with the rise of developing countries’ incomes, meat consumption trends were changing. This not only impacted the direction of trade but also meant that standards governing meat trade needed to continue to respond to the needs of traders and consumers.

6. He stressed that the Specialized Sections’ work needed to support the United Nations Sustainable Development Goals (SDGs) adopted by United Nations member States last year as two of the goals had an explicit reference to food security, sustainable agriculture and responsible consumption patterns. This year, the issue of food loss and waste and its link to standards will be the topic of an international conference “No time to loose on food loss” - organized by the UNECE together with the Food and Agriculture Organization of the United Nations (FAO) - as part of the Working Party on Agricultural Quality Standards (WP.7) session (9-11 November 2016).

7. The Chief of the Market Access Section explained that he had received authorization from the United Nations Interim Administration Mission in Kosovo (UNMIK) to represent

UNMIK Kosovo ¹ and introduced the technical expert who had been nominated to take part in the discussions.

II. Attendance

8. Representatives of the following United Nations member countries attended the meeting: Angola, Australia, Belarus, Botswana, China, Czech Republic, France, Germany, Greece, Honduras, Kazakhstan, Kyrgyzstan, Paraguay, Poland, Russian Federation, Serbia, Switzerland, Thailand, United Kingdom of Great Britain and Northern Ireland, United States of America, Viet Nam.

9. Representatives from the following international organization attended: World Trade Organization (WTO).

10. The European Union delegation to the United Nations in Geneva was also represented.

11. Representatives from the following observer organizations; NGOs; associations, academia and private sector groups also attended: AUS-Qual; Girafood Consulting; GS1 Global Office; Irish Cattle Breeding Federation; Meat and Livestock Australia (MLA); Meat Standards Australia (MSA); Netherlands Food and Consumer Product Safety Authority; Teagasc – Agriculture and Food Development Authority; Texas Tech University; and Warsaw University of Life Sciences.

12. A representative from the United Nations Interim Administration Mission in Kosovo (UNMIK) Kosovo ¹ also attended.

III. Adoption of the agenda

13. The meeting adopted the agenda with some agreed changes.

IV. Matters arising since the last session

(a) UNECE and subsidiary bodies

14. The Chief of the Market Access Section presented developments arising from the United Nations General Assembly having an impact on the work of the Specialized Section, particularly the budget and programme discussions held at the United Nations in New York in the past months. He noted that while work on meat standards was evidently global and their use and effects reached beyond the UNECE region, normative work done by UNECE including UNECE's agricultural quality standards had become the focus of attention. While the General Assembly did not take a final decision on standards-setting, the allocation of resources would probably arise again in future budget and programme discussions. He suggested that delegations consider contacting their Permanent Missions at the United Nations New York office for support. The delegate from the Russian Federation informed the Specialized Section that her country had used ECE standards as the basis for their own national legislation. The Polish delegation noted that they too had adopted ECE standards and had proposed at the European Union level to use UNECE as a hub to connect European

¹ References to Kosovo shall be understood to be in the context of Security Council resolution 1244 (1999)

Union countries. The Chairman pointed out that while standards had evolved and were being revised regularly to remain relevant; they had always kept their integrity. He therefore stressed the importance of informing country representatives at higher levels of this work.

15. The Chief of the Governmental Cooperation Section informed delegations that the Steering Committee on Trade Capacity and Standards had expressed appreciation for the work of WP.7 at its May 2016 session. The secretariat also briefly reviewed the 2015 Working Party session, and its conference on Traceability of Agricultural Produce.

(b) Other organizations

16. The secretariat introduced the proposal by the secretariat of Codex Alimentarius on how to include references to the relevant Codex standards in UNECE meat standards. That decision had already been taken at the Specialized Section's 2015 session. So far, the Codex secretariat had supplied a list of relevant standards which are available on UNECE's web page. The Specialized Section decided to include, as proposed by the Codex secretariat, the following sentence at the end of all UNECE standards for meat: "It is recommended that the produce covered by the provisions of this Standard be prepared and handled in accordance with the appropriate sections of relevant Codex standards on hygiene, contaminants, residues or veterinary drugs and pesticides, traceability and labelling". The Specialized Section asked the secretariat to contact Codex to request making reference to UNECE quality standards for meat in their publications.

V. Meat seminar (29 August 2016)

17. The Chair thanked the secretary of the Specialized Section on Standardization of Meat and her team for the organization of the seminar, which had brought together a large number of participants and very interesting presentations. He noted that the seminar had provided new and very valuable factual and statistical information on meat trade and emerging growth markets; potential future changes, and trends in standards. Delegates stressed the usefulness and relevance of the seminar, which had shown that there was scope to extend the meat standards to markets like China and improve meat quality and safety; and to involve more broadly scientific research and international cooperation in the development of standards in developing countries also. Developing global standards for meat, it was noted, could help developing countries improve the quality and sustainability of their products and decrease the environmental impact of their production. In addition, if eating quality research progressed further, protein production might increase and less waste would occur at the shelf-life stage.

18. It was therefore decided to organize a seminar in 2017. Proposed topics included: an analysis of the competitiveness of meat in relation to other food products; themes related to stakeholders' perspectives such as the commercial aspects of e-certification; as well as country or region focused themes such as the Asian and particularly the Chinese markets (their import certification procedures as well as dietary recommendations). Specific topics and dates would be decided later. Consideration would be given to organizing an event or a meeting prior to or after the International Congress of Meat Science and Technology which will take place in Cork, Ireland, in August 2017, as well as possible collaboration with other organizations and institutes such as the Max-Rubener Institute in Germany.

VI. Proposals for new UNECE Standards

Co-products from slaughter and processing

19. The Chair briefly reviewed the background for the development of a standard for co-products from slaughter and processing, noting that in the spirit of reducing food loss, last year's session had decided to develop an international standard for co-products from slaughter which already traded internationally. The current draft, which had been developed by a delegate from the Russian Federation who was not present at the 2016 session, covered only blood and processed blood products. The delegate of the Russian Federation present at this year's session explained that the present text was based on an existing standard of the Eurasian Economic Union. She noted while technical characteristics were currently missing from the proposed draft, and other by-products such as fat were not included, blood and processed blood products were already included in the UNECE edible meat co-products standard.

20. The Specialized Section discussed the issue and it was considered that further research, market and trade analysis were needed before a separate standard could be developed. In addition, it was pointed out that many of the slaughter by-products were inedible and used by the pharmaceutical, cosmetics or chemical industry.

21. The Specialized Section decided to suspend work on this document and re-discuss the matter at a later stage.

VII. Amendments to UNECE Standards

(a) Deer meat- illustrations and photos

22. The delegate from the Russian Federation indicated that her delegation could not provide the photos required to finalize the standard. International trade in reindeer meat in the Russian Federation had declined considerably over the past years and photos could not be taken. The delegation of France noted that during the development of the standard, the consultation period had been very short and the Specialized Section could envisage a revision to decide on the inclusion of other deer species (for which other delegations could provide photos) or on the development of a specific reindeer standard.

23. The Specialized Section decided to suspend work on this standard for the time being. In the future, a more generic document with sub-sections or appendices for specific species could be developed.

(b) Edible meat co-products

24. The Specialized Section thanked the delegations from France and the United States which had provided new photos during 2016. They reviewed the document and identified those photos that required corrections, changes or replacement. The Specialized Section agreed that for blood products, no photos would be added and when more than one photo was shown for a product, a description would be assigned to each photo. Acknowledgments to the contributing delegations, organizations and photographers would be added at the beginning of the document. The delegation of France agreed to provide new photos for early 2017. Indication on image resolution would be provided by the secretariat. The Russian delegate offered to help with the review of the Russian language version.

25. The Specialized Section decided to submit the photos for adoption to the November 2016 session of the Working Party and add the remaining photos and photo descriptions in early 2017.

(c) Retail meat cuts – lamb and veal

26. The Rapporteur from the United States presented the first draft of the additions to the existing Retail Meat Cut Standard. The additions, i.e. lamb and veal retail meat cuts, had been kept basic and would be completed with contributions from other delegations. As this was a standard for international trade, the Specialized Section agreed to that approach.

27. The Specialized Section added some new cuts, cut descriptions and photos. Currently missing source codes (especially for veal cuts) would be added at a later stage. The delegation of France offered their help with the French version of the text as the terminology used for retail cuts was very particular (e.g. “veal steak” in French was called “escalope de veau” and not “steak de veau” - the term “steak” being reserved for bovine cuts only. The delegate of the Russian Federation said that in the Russian language version, both terms “steak” and “escalope” could be used).

28. The Specialized Section decided to submit the new text for adoption by the Working Party at its 2016 session as a new addition to the already existing UNECE Standard for Retail Meat cuts.

(d) Eggs and egg products

29. The Rapporteur from the United States presented the proposed revisions to the Standards for Eggs and Egg Products which included proposals from delegations and the Rapporteurs meeting. The Specialized Section reviewed both standards and discussed proposed changes. Outdated literature and legislative references would be replaced throughout the standard with new references. Whenever possible, references to country or regional legislation would be removed in favour of the indication “in accordance with the legislation of the importing (or, where appropriate, exporting) country”.

30. During the review of the Standard for Egg Products, lengthy discussions took place on the percentage of minimum solid matter (contained in the annex - Table 1 on physical and chemical indicators of conventional egg products). France had proposed to raise this percentage to 43 per cent to ensure better quality produce on international markets. The delegation of France noted that there was no standard for egg products neither on the European Union nor their national level; the UNECE standard served as the reference for the industry. The delegations of the United States and the Russian Federation indicated that in their national legislations the minimum was set at 43 per cent. Poland explained that while in their (voluntary) standard the level was 42.5 per cent, their industry had indicated to keep a lower level in the UNECE standard, i.e. 41 per cent. The delegation from Poland will consult with its industry on the proposed level. The review of Table 1 and the comments by delegations showed that the values currently included in this table were lower than those usually encountered and, for some of them, very significantly, as in the case of egg yolk, for example.

31. The Rapporteur (United States) also reviewed the UNECE Standard for Eggs. Discussions took place on the proposed deletion of precise temperature indications which vary by country, and exporters needed to comply with the legislation of the importing country. Several proposals were placed in square brackets and highlighted for delegations to review.

32. The Specialized Section decided to keep the revision of both standards as works in progress. The secretariat will prepare post-session documents for further consultations and make them available at <http://www.unece.org/index.php?id=41423#/>. Both documents will be re-discussed at the 2017 session of the Specialized Section.

VIII. Eating quality

33. The Chairman of the scientific reference group on eating quality reported that several meetings had been held in 2015 and 2016 which stressed the importance for worldwide collaboration in the area of eating quality research. He presented several recommendations which had been formulated by the group for review and adoption by the Specialized Section.

34. Some of the main problems encountered in international eating-quality research projects were linguistic, and it was difficult to ensure that the data collected meant the same in every country. It was therefore important to engage with e.g. ICAR (International Committee for Animal Recording); ATOL (Animal Trait Ontology for Livestock) or OntoBeef to ensure the optimal linkage of live animal and genomic data. As it would be easier for the UNECE secretariat to act as the facilitator with regard to the aforementioned organizations, the Specialized Section invited the UNECE secretariat to contact the organizations in due course to help solve linguistic issues.

35. The group also recommended adding an explanatory guide to the UNECE Bovine standard to facilitate research collaboration and data interchange or pooling. Particular focus would be Section “5.7 Meat Quality Standards” which include MSA criteria and United States Department of Agriculture (USDA) equivalence to provide the basis for carcass eating quality-grade inputs. The explanatory guide would better describe those criteria (marbling, colour) and link colour to a colour scale or offer images as visuals for marbling and fat content determination. Both, the United States and Australia agreed to make available their standards for use and study purposes. AUS-MEAT offered to facilitate training in the uniform, standard application by utilising OsCap (Onsite Correlation and Practice system) through the reference centre against a cost recovery fee to be paid by the individual users.

36. It was also agreed to include in the explanatory guide a first draft of the table in Section 5.6.2 with the numeric muscle codes presented in conjunction with common cut names to facilitate short descriptions. In addition, it was agreed to add days of age as a measure of animal age and the EUROP Muscle and Fat Score description as an interim description of carcass yield. The Specialized Section will review those additions at its 2017 session.

37. The Specialized Section also agreed to adopt the MSA consumer testing protocols as an interim standard for consumer sensory evaluation and reporting as there was considerable existing European data that had the potential for amalgamation.

38. The Specialized Section took note of the issues surrounding data ownership and intellectual property rights (IPR) linked to a standard data structure, data access and the pooling of data for collaborative research purposes. One option proposed by the eating quality reference group was to make UNECE the custodian of the data. However, the secretariat pointed out that there were not only technical but also legal issues involved that required careful analysis. As UNECE was an international organization, data stored there would become part of the public domain. It was therefore decided to establish a working group coordinated by Australia to look into technical, IPR and legal aspects relative to the pooling of data and access arrangements.

39. The delegate from France noted that the work undertaken was very ambitious and many financial and practical questions remained to be solved. The Chair pointed out that new approach would improve the understanding between producers and buyers worldwide. It would be eventually a first step away from including only trade practices in standards and towards including consumer behaviour, expectations and demands.

40. The Specialized Section decided to propose these items of work to the 2016 session of the Working Party for information and approval.

IX. Food waste and standards

41. As already pointed out at the 2015 session of the Specialized Section, there was consensus that very little loss and waste occurred along meat supply chains and the meat industry tended to use as much of the base product and protein as possible. It was also agreed that it was important to keep standards at a certain level to avoid putting people at risk and educate them to become responsible consumers. Standards like the standard for edible co-products, for example, made sure that all protein fit for human consumption could be used and traded while ensuring quality and the well-being of the consumer.

X. Future work

42. The Specialized Section agreed to place on the 2017 agenda:

- Eating quality (coordinated by Poland and Australia)
- Duck (coordinated by China)
- Goose (coordinated by China)
- Rabbit (coordinated by China)
- Egg standards (coordinated by the United States)

43. The delegation of China proposed to host a rapporteurs meeting on duck, goose and rabbit meat in China in 2017. In addition, a capacity-building workshop for Asian countries could be organized in conjunction with that meeting. Concrete dates and venues would be communicated in due course

XI. Election of officers

44. The Specialized Section elected Mr. Ian King (Australia) as Chairperson, and Mr. Craig Morris (United States) as Vice-Chairperson until the next elections in 2017.

XII. Adoption of the report

45. The Specialized Section adopted the report (ECE/CTCS/WP.7/GE.11/2016/2) on its twenty-fifth session. The next session will take place in Geneva from 5 to 7 July 2017, pending other arrangements in an alternative venue and hosted by a member state.