

What is the future of the UK in National, European and Global agri food and drink markets

A Question Time style event

Speaker:	Various	Map Link:	Click here to view the map Link
Date:	28/09/2016	Host:	Food, Drink and Agriculture Group
Time:	18:15	Add to calendar:	
Venue:	Mintel 4 Playhouse Yard London United Kingdom EC4V 5EX	<input type="button" value="Share"/>	<input type="button" value="Tweet"/> <input type="button" value="Share"/>

Description:

After developments following the recent EU referendum, the future role of the UK agri food and drink sector in our own national, european and global markets is full of unknowns, but still has numerous potential opportunity and threat areas. This event draws together a panel of well-informed individuals from across the supply chain for you to ask questions to on this important subject and hear what they have to say.

The panel will be made up of:

- Allan Wilkinson, Head of Agriculture & Food, HSBC
- Professor Julian Park, Head of Agriculture, Food & Environment, University of Reading
- Minette Batters, Vice President, NFU
- Rich Clothier, Managing Director, Wyke Farms
- Keith Smyton, Head of Food & Drink Unit, Welsh Government
- Carina Perkins, Buying & Supplying Editor, The Grocer

The event will be chaired by John Giles, the current chair of the FDA of the CIM Group.

CPD duration: 2 hours

CPD category: Insights

Registration and networking is from 18:15, the session starts at 18:45 and finishes at 21:00. If you are non-EU resident please call the Network Support team to make your booking.

Contact:	Network Support team
Contact e-mail:	cimevents@cim.co.uk
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Women in Dairy Annual Conference 2016

Wednesday 28th September
Sixways Stadium, Worcester, WR3 8ZE



Due to popular demand and the success of our Inaugural Conference last year, Women in Dairy will be returning to Sixways Stadium on Wednesday 28th September to host a second conference, this year, focusing around the theme 'Resilience in Adversity'.

The day promises to 'connect, share and inspire' delegates, focusing on the current state of the industry with advice and talks from a line up of inspirational speakers - please see below for full details.

Tickets

General admission £50 + VAT

Women in Dairy members £36 + VAT

Women in Dairy group attendees £40 + VAT

*VAT and booking fee will apply upon checkout

[Book tickets](#)

Programme

10:00am – Registration (with refreshments)

10:25am – Event opened

10.30am – Welcome to Women in Dairy – Jane King, Chief Executive, AHDB

10.45am – Working in the current climate – Oliver McEntyre, National Agricultural Strategy Director, Barclays

11.30am – Coffee break

12:00noon – Promotion and speaking to the public - Amanda Ball, Strategy Director Dairy, AHDB

12.15pm – How to engage the public and reverse the perception – Judith Capper, Livestock Sustainability Officer

1.00pm – Lunch

1.45pm – Staff management and motivation – Heather Wildman, Saviour Associates

2.30pm – Lyndsay Chapman, Agriculture Director, Muller Wiseman

3.00pm – Review of today – Lisa Williams, Promar International, Victoria Chomiak, RABDF, Sarah Bolt and Rebecca Miles, AHDB Dairy

3:10pm – Refreshments and finish

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View from Overseas

South Africa Looks To Diversify Exports - but the grower base needs to change to enable the process



South Africa has been exporting its fresh fruit to the European markets since the late 19th century, with the UK often being the grower's principal target. But as with many of the other leading fruit producers and exporters around the world, the opportunities in the emerging markets of Asia, the Middle East and the Former Soviet Union (FSU) are looking increasingly attractive. And for South Africa, it has the added bonus of having a number of quickly developing African markets on its (relative) doorstep. As an example, the Continent's total import of apples has grown to almost 600,000 tonnes per annum. South Africa has already gained a more than respectable share in many of the key African countries, whereas other international exporters such as the US, Chile and EU member states, have still to work out their game plan.

Nothing is impossible, however, and with time, effort and resource, the opportunities are potentially huge and the sky is the limit, in some cases. At the same time, any sense of throwing the baby out with the bath water is unlikely to pay dividends. The real challenge for South Africa will be to balance its portfolio of markets to include the best of both worlds – retaining a strong customer base in the UK, EU and other mature markets, as well as at the same time, building business rapidly in more emergent markets. For some products, the UK and EU are still of key strategic importance and will be for some time to come.

Looking at how South Africa has fared in terms of exports over the last seven years provides an indication of what has been achieved to date, *vis-à-vis* the diversification process and the scale of the challenge that still faces the fruit industry, see Table 1.

The analysis below also shows that markets in the EU are still of fundamental importance to the SA fruit export sector and will be for the foreseeable future. With

globally based retailers looking to move into emerging markets themselves, a strategy of "follow the customer as much as the country" might well be a sensible one to follow as US, French, German, Dutch and some UK retailers look to strengthen their position in these markets and take their best suppliers with them.

How might this be achieved? In some of our recent

work at Promar International, we have developed a 4 stage model of how we see horticultural producers developing over the next 5-10 years. This is illustrated above.

What will see the South African fruit sector develop will be how quickly the industry can move away from producers who are in Stages 1 and 2. In SA, we see relatively few still in Stage 1, but a good number still in Stage 2 – where the emphasis is on "doing the job" and where a sense of "working harder" is seen as the way to doing better in the future.

For a more modern, go ahead and progressive industry to evolve, and take advantage of the new market opportunities, be they in developed or emerging regions of the world, we feel that more producers need to be in Stages 3 and 4. The emphasis here is on the more professional management of farms and the development of other skills setting apart from just being a "good" farmer. These will focus on areas such as the development of leadership skills, and a more innovative approach to growing and



How we see the world – producer development model

packing, as a way to create value for their business. There also needs to be a wider view of engaging with the immediate supply chain and beyond.

It will eventually see a broader mix of ownership models in the South Africa, the use of more and a wider set of professional advice in the fruit production and export sector. This will enable it to develop further some of the new markets that are alluded to in the analysis above. The key question of course is how is this achieved beyond merely "letting it happen" over a period of time?

Some individuals will grasp the nettle themselves, indeed a number of leading operations already have – but it will be up to the industry organisations, such as SATI, HORTGRO, SAAGA and the CGA to lead the way and as well as keeping the standard of technical skills at a high level, introduce other skill and mind sets to the South African fruit industry. This will be in areas such as leadership, vision setting, a wider appreciation of the supply chain, marketing, environmental skills and the development of highly professional farm managers who display high levels of social and emotional intelligence. This is no mean task and will take time to achieve, but with more producers in Stages 3 and 4 over the coming years, then the sky really might be the limit for the SA fruit sector.

Piece provided by
 Liveryman John Giles

Table 1. South African Exports – Fresh Fruits and recipient markets

Fruit	2008	2014	Share Europe 2014	Share Africa 2014	Share Other named Markets 2014
Apples	358,000 tonnes	381,000 tonnes	20%	37%	43%
Grapes	260,000 tonnes	298,000 tonnes	70%	0%	30%
Oranges	970,000 tonnes	1,100,000 tonnes	30%	23%	47.5%
Soft Citrus	110,000 tonnes	150,000 tonnes	53%	21%	26%

POSITIVE SIGNS AS SHOPPERS BUY MORE FRUIT AND VEG

While there are winners and losers across the category, the overall picture for the fresh produce aisle is highly encouraging. Michael Barker reports

These are nothing if not interesting times for the UK grocery market. The march of the discounters is having a profound impact on the trade, and the price war is showing no sign of abating – witness Walmart International boss David Cheesewright's recent comments that Asda will prioritise share over profit, indicating a new wave of price reductions.

There's no question that price deflation is having a suppressive effect on fresh produce category growth, but it's not all bad news as our analysis shows many categories shifting a healthy amount more product than last year. In fact, of the 50 items listed in this 2016 edition of the FPJ Big 50 Products, just 10 are showing volume decline.

The fruit and vegetable category as a whole at retail is now worth £10.2 billion, a 3.3 per cent increase on the year before [Kantar Worldpanel, 52 w/e 22 May 2016], and overall volumes have also risen by 3.5 per cent. That indicates solid growth at a category level, but there are major variations within that as certain product groups outperform others.

Berries continue to be a star performer, recording strong double-digit growth across almost all product lines, while flavour-of-the-moment items such as avocados, spinach and kale are seeing spectacular sales increases.

Those products that are tasty, convenient and easy to snack on are doing

particularly well, while traditional items such as pineapples, cooking apples, old potatoes and cauliflower are finding life a struggle. For those products, finding new ways to excite the consumer and tap into modern lifestyles will be key to getting sales moving in the right direction again.

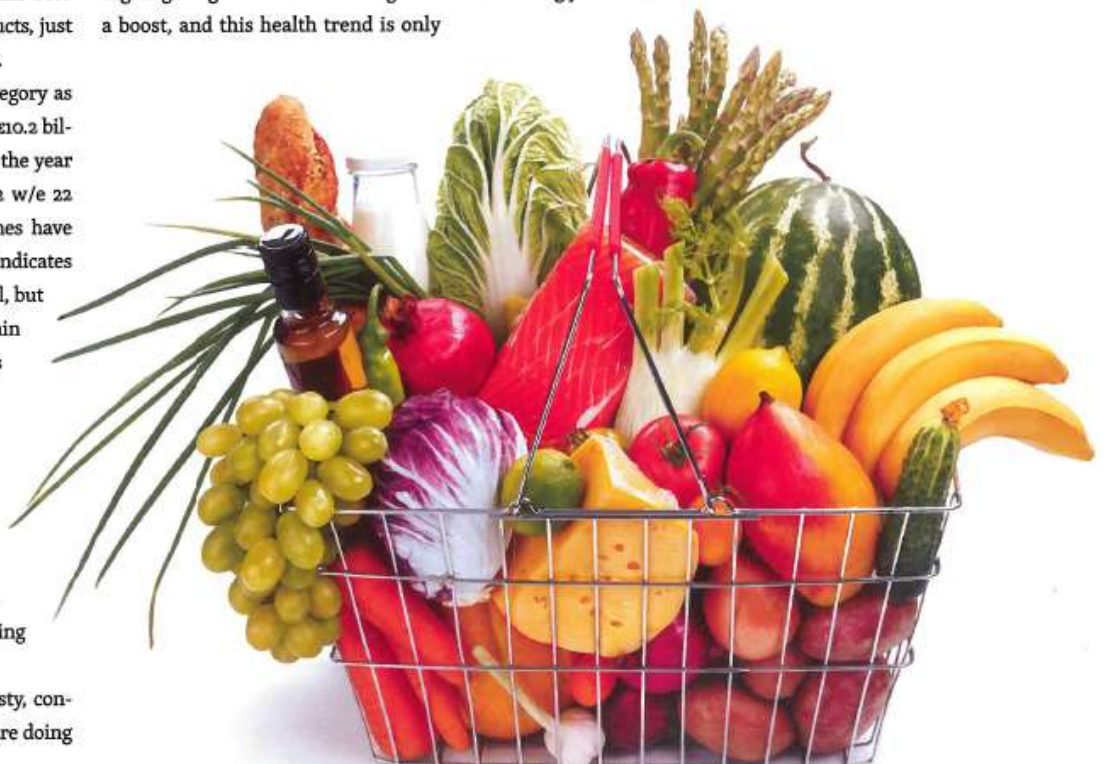
"These figures are not surprising," says John Giles, agri-food director at Promar International. "The growth in exotic fruit, berries, cherries and so on is part of an ongoing trend, whereas some less fashionable products have been in gradual decline."

The rise of juicing and spiralling is giving a number of categories a boost, and this health trend is only

likely to continue. Some of the new sweeter, tastier varieties coming through will also have a continued role to play in increasing 5 A Day consumption, and while prices are likely to continue to stay low, quality will become the key differentiator between stores.

And then there's Brexit – the great unknown. "Nobody really knows at this stage what impact it will have on the UK grocery trade," says Giles. "It depends how quickly we choose to come out and how successful we are at negotiating what we want. Access to the EU market is highly desirable, in both directions."

The weakness of sterling will put pressure on in markets like fruit – where so much is imported – and whether retailers are prepared to swallow lower margins to keep prices down, or pass them through the chain to consumers or even suppliers, will be one of the most keenly watched developments of the coming year. **FPJ**



TOP 5 BIGGEST RISERS



+1,333% (£254,000)



+74.9% (£383,000)



+49.7% (£1.1m)



+38.2% (£2.1m)



+38% (£130.9m)

TOP 5 BIGGEST FALLERS



-56.7% (£13,000)



-44.8% (£1.1m)



-20.7% (£38,000)



-17.7% (£38.1m)



-16.3% (£1.2m)

ONES TO WATCH



+31.1% (£18m)

Outside the Big 50, dates are one of the fastest-growing products. Increasingly spotted as office snacks, and with sweetness and convenience on their side, this growth is set to continue.



Strong growth in basil (+12.6%), mint (+19.8%), chives (+14.2%) and parsley (+16.1%) all point to a rise in home cooking and suggest herb supply is a good place to be right now.



+17.7% (£5.4m)

Strong value growth from ginger is in line with a rise in other cooking ingredients, helped along by a tightening in global supply.

FPJ Big 50 Products 2016

Rank	Product	Value	Position Compared to 2015	Page
1	Dessert Apples	£831.9m	Non-mover	6
2	Grapes	£775.9m	Non-mover	6
3	Tomatoes	£712.2m	Non-mover	8
4	Strawberries	£570.8m	Up 2	8
5	Bananas	£561.3m	Down 1	9
6	Old Potatoes	£535.3m	Down 1	9
7	Easy Peelers	£438m	Non-mover	10
8	Mushrooms	£396m	Non-mover	10
9	New Potatoes	£321.6m	Non-mover	12
10	Peppers	£292.8m	Non-mover	12
11	Blueberries	£292.3m	Up 1	13
12	Baking Potatoes	£233.1m	Up 1	13
13	Carrots	£231m	Down 2	14
14	Raspberries	£224.3m	Up 4	14
15	Onions	£215.6m	Down 1	16
16	Pears	£215m	Down 1	16
17	Lettuce	£190.7m	Down 1	18
18	Cucumbers	£186.8m	Down 1	18
19	Broccoli	£179.9m	Non-mover	20
20	Oranges	£169.9m	Non-mover	20
21	Beans	£161.4m	Non-mover	21
22	Melons	£137.7m	Non-mover	21
23	Avocados	£130.9m	Up 3	22
24	Cherries	£126.8m	Non-mover	22
25	Cauliflower	£114m	Down 2	23
26	Nectarines	£110.9m	Down 1	23
27	Plums	£92m	Up 1	24
28	Cabbage	£91.5m	Down 1	24
29	Lemons	£87.6m	Up 3	26
30	Sweetcorn	£80.5m	Up 3	26
31	Spring Onions	£77.6m	Down 2	27
32	Sweet Potatoes	£77.4m	Up 5	27
33	Asparagus	£74.5m	Up 1	28
34	Celery	£74m	Down 3	28
35	Leeks	£73.1m	Down 5	29
36	Courgettes	£71.5m	Down 1	29
37	Parsnips	£56.7m	Down 1	30
38	Peaches	£54.5m	Up 1	30
39	Beetroot	£54.4m	Up 1	32
40	Brussels Sprouts	£53.9m	Down 2	32
41	Peas	£52.8m	Up 2	33
42	Mangoes	£50.6m	Down 1	33
43	Kiwis	£44.8m	Down 1	34
44	Spinach	£42.7m	Up 2	34
45	Pineapples	£38.1m	Down 1	36
46	Garlic	£36.7m	Up 1	36
47	Swede	£34.5m	Down 2	37
48	Grapefruit	£32.8m	Non-mover	37
49	Kale	£32.1m	New Entry	38
50	Blackberries	£29.9m	Non-mover	38