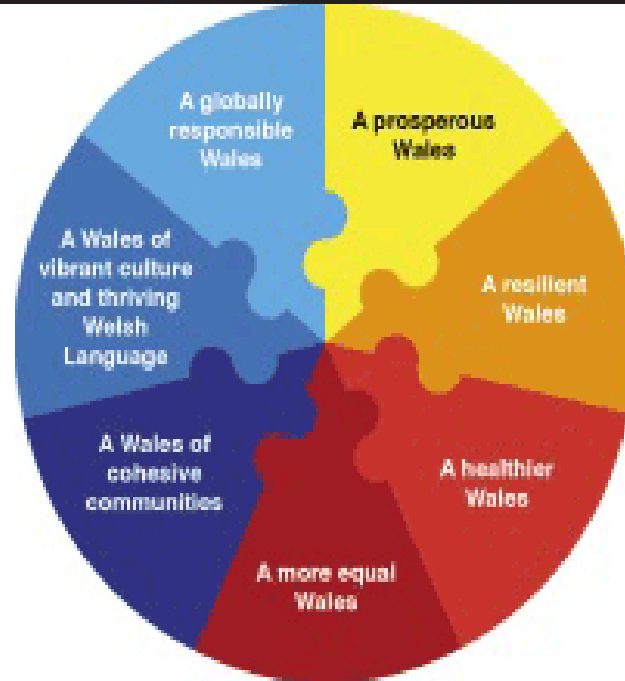


BWYD A DIOD CYMRU FOOD AND DRINK WALES



Towards Sustainable Growth: An Action Plan
for the Food and Drink Industry 2014-2020

A snapshot at December 2015

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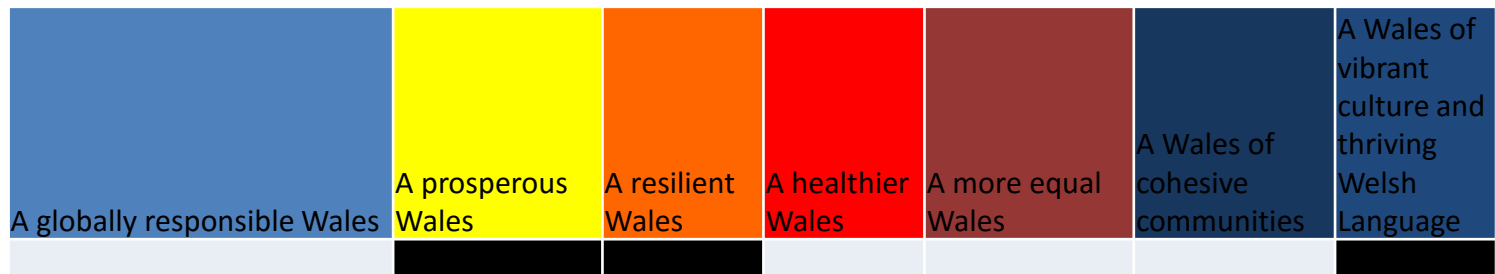
Food & Drink Wales Industry Board

- Alison Lea Wilson, Director of Cwmni Halen Mor Mon.
- Andy Richardson, Head of Corporate Affairs, Volac, Cambridge.
- Annitta Engel, business, technical, quality, training & product development services.
- Buster Grant, Managing Director Brecon Brewing.
- Catherine Fookes, Campaign Manager for the Organic Trade Board.
- David Lloyd, Director Zero2Five Food Industry Centre.
- Huw Thomas, Managing Director Puffin Produce Limited.
- James Wilson, Non-executive board member at Seafish.
- Justine Fosh, Chief Executive Officer National Skills Academy Food and Drink (Improve).
- Justin Scale, Managing Director Capestone Organic Poultry.
- Katie Palmer, Sustainable Food Cities; Food Cardiff.
- Llior Radford Commercial and Marketing Director Llaeth y Llan.
- Marcus Sherreard, Retail Sales Director Dawn Meats.
- Norma Barry, FSA Welsh Food Advisory Committee and former civil servant with strategic development and marketing of the food and drink production and processing sectors.



Great Taste Awards 2015

174 Great Taste awards went to products from Wales this year: 122 entries achieving 1-star; 42 getting 2-stars; and **ten being deemed worthy of the 3-star accolade**. This year's competition witnessed a 25% upsurge in Welsh entries, rising from 99 companies entering 374 products in 2014 to 143 companies putting 491 products forward for consideration in 2015.





Education, Training and Skills Development

Industry skills partnerships

- The Welsh Dairy Industry Skills Partnership aim to develop key Dairy Science skills within their businesses.
- In line with the concept of the WDISP, participating businesses have driven the process of identifying immediate needs within a long-term strategic development plan. A delivery partner is being sought.
- The training outcomes will assist businesses achieve growth through increased product quality, innovation and process efficiencies.

A globally responsible Wales	A prosperous Wales	A resilient Wales	A healthier Wales	A more equal Wales	A Wales of cohesive communities	A Wales of vibrant culture and thriving Welsh Language
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Welsh Bacc challenges

- Enterprise and employability
 - Global Citizenship
 - Community Challenge.
-
- From September 2015 – Food security module



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- Food and drink manufacturing employs 22,000 people.
- **4,000** more jobs are predicted to appear by 2020.
- The National Skills Academy for Food and Drink (NSAFD) has launched Tasty Careers Wales – an initiative to promote jobs and careers in the food and drink industry to young people.
- The Tasty Careers initiative brings together industry career information and live industry vacancies to make them instantly accessible to young people and to help secure the next generation of food and drink manufacturing talent.

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HOW DO YOU MAKE A LOAF OF BREAD?



... It's not as simple as you might think... **FARMERS** grow the wheat and harvest it using equipment designed by **AGRICULTURAL ENGINEERS**. The wheat is milled and the protein level of the flour checked by **FOOD TECHNOLOGISTS** to make sure it is right for bread making. Then **BUYERS** from the bakery source more ingredients including salt, sugar and yeast. **FOOD SCIENTISTS & TECHNOLOGISTS** check the quality of the ingredients and then it is over to the **PRODUCTION MANAGER'S TEAM** to manufacture the right quantities of bread using the recipe developed by the **PRODUCT DEVELOPMENT MANAGER** while **FOOD ENGINEERS** design and maintain the equipment used during baking and slicing. **FOOD PACKAGING RESEARCHERS** by now, have already investigated and chosen packaging to select the right packaging material and method. Throughout this whole process managed by the **TECHNICAL MANAGER** the quality and safety of the bread is checked continuously by the **QUALITY ASSURANCE MANAGER**. Finally, the bread is dispatched to the shop by the **DISTRIBUTION MANAGER** so that when it gets into your shopping bag it's fresh & wholesome!



BET YOU THOUGHT IT ONLY TOOK A FEW CUPS OF FLOUR & SOME BUTTER!



To find out more about the type of career opportunities available within the Food & Drink Manufacturing Industry visit:

TASTYCARERS.ORG.UK

 FIND US ON FACEBOOK

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Food Business Investment Scheme (FBIS)

- Heavily oversubscribed with 85 Expression of Interest (EOI's)
- Total project investment would be £197,352,947 with a total grant request of £44m V against the approved budget for this EOI window of £8m.
- The EOI process is the first stage of the application process.
- Scoring of Stage 1 - EOIs is complete and companies have been notified.
- Quality of the projects submitted was very high and 24 projects across a range of food sectors have been invited to apply for grant.

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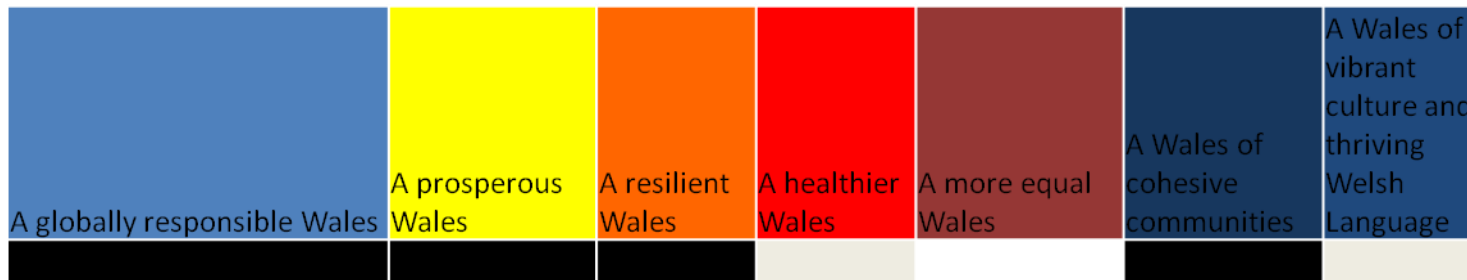
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FBIS delivering on Well-being of Future Generations (Wales) Act 2015

EOI screening

	Priority Criteria	Score	Weighting Factor
1	Turnover	0 - 4	X 5
2	Sustainability	0 - 4	X 4
3	Innovation	0 - 4	X 3
4	Education, Training, Skills	0 - 4	X 3
5	Employment	0 - 4	X 2



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The **Cluster projects** (Impact, Micro and NutriWales) will address the knowledge base and business opportunities by developing clusters of businesses using the Triple Helix model of delivery to develop the commercial opportunities and partnerships between food businesses, education/research institutions and policy makers in Wales in a targeted and structured fashion.



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NutriWales will focus on the following themes:

- Managing food allergies/intolerances (free from category)
 - Nutrition for health ageing
 - Food for disease prevention and/or management
 - Functional food
 - Sports nutrition
 - Weight management/managing obesity
 - Product reformulation for improved public health benefits
- **Food and drink companies will benefit from:**
 - Access to relevant market research and intelligence
 - Dietary food related news updates
 - Networking events
 - Dietary/Nutrition Buyer database (private and public sector), briefings by buyers
 - Opportunities to collaborate with leading medical and academic researchers and NHS to help stimulate innovation and new product development
 - Access to finance opportunities through Welsh, UK and International R&D funding sources
 - International technical and commercial collaborative opportunities in dietary health & nutrition
 - Access to regulatory and technical advice
 - **Academic members of NutriWales will be able to:**
 - Identify potential private sector partners for joint funding projects
 - Explore specific applications of their R&D with food and drink companies
 - Access networking events with food and drink companies

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Food Festivals

- 13 years of food festival support
- Funding reduced by 46% since 2012 and applications fallen from 52 to 28
- Welsh Food and Drink producers form at least 75% of all exhibitors (with a minimum requirement of 25 Welsh food and drink producers at each festival) and that 80% of all exhibitors are food and drink producers
- Funding is typically used for additional event activity such as cookery demonstrations, enhancing the advertising and promotion of festivals, children's days and food trails, the hiring of additional equipment (marquees for example) as well as general Infrastructure.



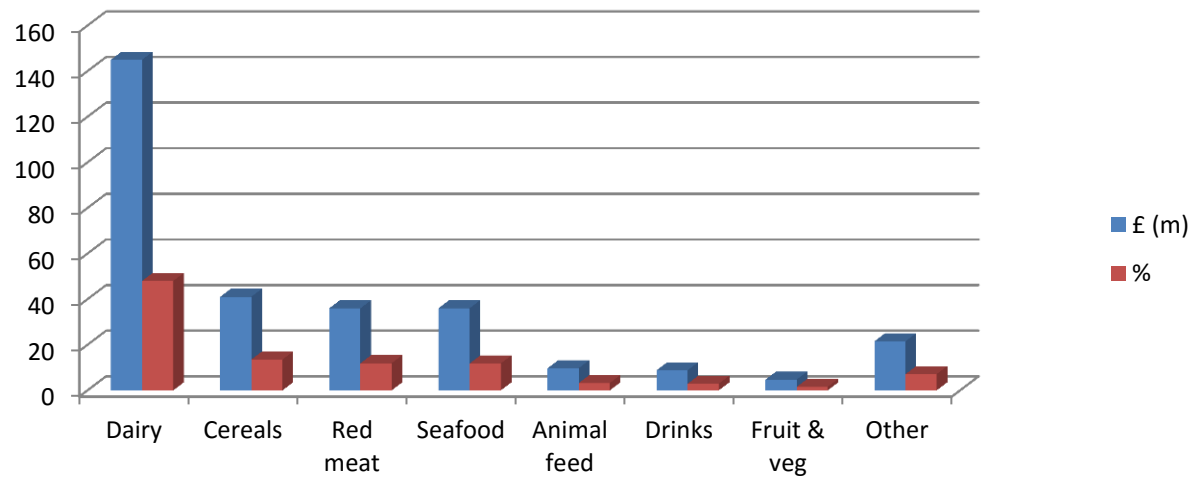


Food Festivals – the results

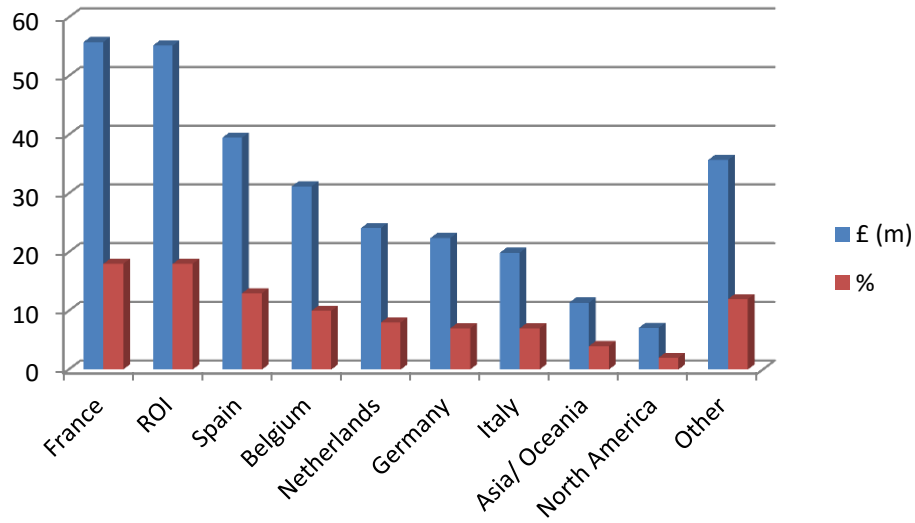
- Almost a third of exhibitors surveyed (31%) are less than three years old whilst almost half (48%) have turnover of less than £25,000.
- More than one third (38%; 95/250) reported that they had started selling new products as a result of their attendance at food festivals
- An additional £1.6m of additional spend associated with the operation of food festivals (ie the spending incurred on the infrastructure to run the festival)
- Net additional spend to the Welsh economy from non-Wales based visitors who are attracted to the area because of the food festival of £5m of which £3.6m has been spent in the local areas outside of the actual festivals
- Producer/exhibitor related impact derived from sales at, but more significantly, arising from the food festivals of £19.8m.



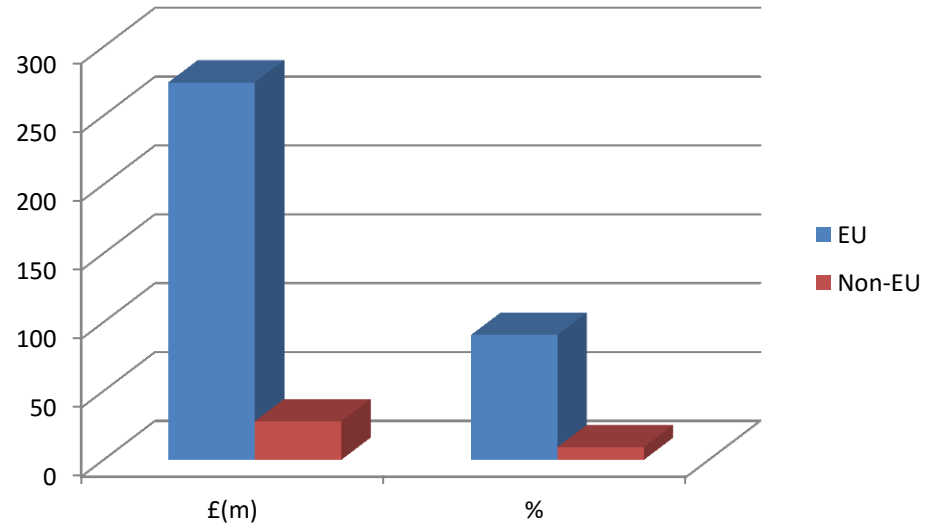
Welsh food and drink exports 2014



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Top export destinations 2014



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Revision of the Trade Development Programme

- Summer Fancy Food Show, New York City, USA removed from the programme;
- Food and Hotel China, Shanghai, China removed from the programme;
- Trade Development Visit to Netherlands and Belgium added to the programme;
- Trade Development Visit to Spain added to the programme;
- International Trade Event/ Meet the Buyer event for Wales added to the programme (as a competitor for similar devolved nation events, and to develop a flagship trade event in Wales to leverage more inward missions/delegations); and
- A pilot exercise to establish and in-market expert/specialist in a key target market(s) added to our programme activity.

NETHERLANDS and **BELGIUM** were 5th and 4th respectively in the top export destinations for Welsh food and drink in 2014 (combined, 18% of exports, value £55.3m). Exports (by value) to Belgium increased by 1,512% from 2005 to 2014; whilst exports (by value) to the Netherlands increased by 230% over the same period.

SPAIN was 3rd in the top export destinations for Welsh food and drink in 2014 (13% of exports, value £39.5m). It also highlighted that exports (by value) to Spain increased by 237% from 2005 to 2014.

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Market access

The scope of the domestic market, (especially in red meat with only 5% of production consumed in Wales), makes the export of Welsh food and drink a necessity.

In 2013, 22% of non-exporting food producers expressed an interest in exporting compared to 17% in the previous year (Wales Food Producers Survey 2013).

- **Defra Export Action Plan Forum**

The Forum guides the development of work to grow exports. The Export Forum identifies opportunities for export growth and obstacles that currently prevent them from being pursued, and recognises and mitigates risks to existing export markets.

- **Defra Export Implementation Forum**

The Implementation Group brings government and industry bodies together at a working level to realise export growth.

- **UK Export Certification Partnership (UKECP)**

UKECP is a WG/Defra/industry partnership that liaises with the UK livestock and livestock products industries to establish export market priorities and provides a forum to discuss the use of Defra agents to negotiate export health certificates on behalf of the UK. The partnership also assists in the drafting of export health certificates which are generally required before exports can take place.

- **Welsh Government internal exports roundtable**

Primarily aimed at Welsh Government officials with a professional interest in the export of Welsh food and drink, the forum considers opportunities for maximising export opportunities and procedures and ties in expertise from a broad area of interest.

- ❖ **USA Welsh lamb exports**
- ❖ **China Welsh lamb exports**



Tackling food poverty

Food Poverty Alliance

- Born out of the Food Poverty Think Tank
- Representatives include Local Authorities, Public Health, Trussel Trust, Fareshare, Dietiticians, retail/ foodservice, LACA, WRC facilitated by WG.
- First meeting 12 November.
- Agree TOR, administrative arrangements and priorities for action.

Schools and education – holiday hunger, uptake of school meals, free breakfasts, improved lunchtime experience.

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Environmental impact

- **Courtauld 2025** follows earlier Courtauld commitments and aims to further reduce the weight and carbon impact of household food waste, grocery product and packaging waste, both in the home and the UK grocery sector.
- The impact of Courtauld Commitment 3 is predicted to be a cumulative reduction of 1.1 million tonnes of waste, 2.9 million tonnes of CO₂(e) and a cost benefit of £1.6 billion to consumers, food and drink sector and local authorities. During the three phases of the Courtauld Commitment, a 20% reduction in household food waste could be achieved.
- The agreement is funded by Westminster, Scottish, Welsh and Northern Ireland governments and delivered by WRAP.

REW- WRAP Cymru manage the delivery of the Resource Efficient Wales service (REW) on behalf of Welsh Government. It is an ongoing challenge to engage businesses to prioritise environmental challenges.

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