British Growers Association is a grower owned and grower led umbrella group comprising a range of organisations operating in the UK horticulture industry and fresh produce sector.

The membership includes Crop Associations, Producer Organisations and marketing groups.

British Growers provides a focal point for UK horticulture.
Our organisations

**Crop Associations**
- Asparagus Growers Association
- Baby Leaf Growers Association
- Brassica Growers Association
- British Carrot Growers Association
- British Herb Trade Association
- British Leafy Salad Association
- British Onions
- Mushroom Growers Association
- Outdoor Cucurbit Grower Group
- Rhubarb Growers Group
- Plant Propagators Ltd
- The Leek Growers Association
- Turfgrass Growers Association

**Producer Organisations**
- Green Pea Company
- Aylsham Growers
- Holbeach Marsh Cooperative
- Stemgold Peas
- Avalon Growers
- East of Scotland Growers

**Marketing organisations**
- English Apples and Pears
- British Summer Fruits
- British Edible Pulse Association
The UK food market – the scale of the opportunity

Retail food sales £110bn

Out of home food sales £90bn

UK Food exports £22bn
The import export deficit

3.4 UK trade in different food groups, 2016

- Sugar
- Oils
- Animal feed
- Coffee, tea, cocoa etc.
- Misc.
- Fish
- Dairy & eggs
- Cereals
- Beverages
- Meat
- Fruit and veg

£ billion
Market share - how much more could the UK produce?

UK Self Sufficiency
The health agenda

an opportunity for UK growers to produce more than 1.5 million MT of extra veg per year.
The relentless pace of change

Sainsbury's to axe thousands of store management roles

Retailer says cost-cutting drive will affect thousands of roles but headcount will stay the same

Tesco announces 1,700 job cuts as it 'simplifies' its business

Supermarket says it will also create 900 roles and will help staff affected into new positions within the company

Why Aldi and Lidl will keep on growing

UPDATE: The Big Four grocers are growing again, but the German onslaught is far from over.
Access to labour

AN ASSESSMENT OF THE CURRENT & FUTURE SEASONAL LABOUR REQUIREMENT FOR UK ORCHARD CROP PRODUCTION AND THE POSSIBLE IMPLICATIONS OF RESTRICTIONS ON SEASONAL WORKER NUMBERS

HOW BREXIT COULD CRUSH OUR SOFT FRUIT INDUSTRY
& the implications for food prices, the nation’s health, the economy & food security

From British Summer Fruits
Plant protection

**DEVELOPMENT OF APPROVED ACTIVE SUBSTANCES**

Source: European Commission

- 'Old' active substances
- 'New' active substances

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**Healthy Harvest**
The impact of losing plant protection products on UK food production

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**British Growers**
Fresh thinking - growing opportunities
Brexit
An opportunity for a fresh approach
Productivity - increasing volume

UK SOFT FRUIT PRODUCTION
1996 vs. 2015 – TONNES

<table>
<thead>
<tr>
<th></th>
<th>1996</th>
<th>2015</th>
<th>Increase %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strawberries</td>
<td>40,100</td>
<td>115,500</td>
<td>188</td>
</tr>
<tr>
<td>Raspberries</td>
<td>13,200</td>
<td>17,200</td>
<td>30</td>
</tr>
<tr>
<td>Other Soft Fruit</td>
<td>8,100</td>
<td>9,400</td>
<td>16</td>
</tr>
<tr>
<td>Total</td>
<td>61,400</td>
<td>142,100</td>
<td>131</td>
</tr>
</tbody>
</table>

Source: DEFRA

©BGA 2016
Productivity - quality
Reducing cost
Productivity - reducing risk – improving consistency
Productivity - waste minimisation
R&D and innovation
New Product development
Promotion
All your vitamin A
Fuelled by a
carrot a day
VEGPPOWER

All your vitamin A
Fuelled by a
carrot a day
Summarising the offer from UK horticulture

- Increasing market share
- Reducing reliance on imports
- Export opportunities
- Healthy lifestyles
- Improving productivity
- Innovation
- New products
- Reducing waste
- Building natural capital
Marketing Information – Driving transparency and efficiency

Mark Phillips
07/06/18
“We want to explore how the collection and dissemination of market data could be improved to increase transparency, encourage better communication and the sharing of information, and support efficient working across the supply chain”

Produce View is the affordable and unique solution vs. the internet foragers
“Produce View a Management Tool which offers unique data vs. the Internet Foragers”

- Price
- Variety
- Country of Origin
- Count/size (where appropriate)
- True representation of what is on sale in store (vs. online)
- 10 Years of history
- Real time store fixture photo capture
- All **Major Multiples, M&S, Aldi, Lidl and Convenience** (e.g. Locals and Express)
- Bespoke data collection service – one-off or periodic (weekly/monthly) e.g. Store Planogram Compliance
Until now the Product has been available as a simple subscriber model

- Used as a database where clients can extract their own bespoke data 24/7
- Real time weekly data
- Utilised as for “backward looking” data mining and formatting tool
- Bi-Weekly reports to the FPJ

This model has worked well and has underwritten Produce View as the data source of choice for the Fruit and Vegetable industry – available online or on Excel
We are about to “Turn Up The Heat” with a change of focus!

- Weekly snap-shot reports built around our clients requirements*
- Monthly trend reports built around our clients requirements*
- Mutually beneficial partnerships e.g. Grower Groups/Special Interest Organisations

Weekly/Monthly trend reports will be available under the British Growers Brand

* Each report created by our team of specialist analysists
• Only Produce View can answer the key questions in our industry
Only Produce View can answer the key questions in our industry!

- Which retailer has the lowest price for a selection of items?
- Who tops the Britishness index?
- Who has the lowest food miles?*
- Who really is first to market with new varieties or seasonal products like English strawberries and asparagus?
- Who has them on sale for the longest?
- Who offers the widest range of varieties and sizes in any given category?
- Who has the widest Organic range and the lowest premium vs. Conventional?

As well as all your key category questions e.g. gap analysis, range reviews, opportunity gaps and read-across issues = £

*when used in conjunction with Epos/Panel data
New for 2018 bespoke category weekly and monthly snap-shot reports. Our unique category report service builds around your specific needs delivered in a new easy to use convenient format.
What’s in the reports?

- Which retailer has the lowest price for a selection of items? Focussed price tracking summary on the core SKU’s for your category
- Real world prices (all SKU’s) across multiple retail, M&S, discounters and convenience formats (e.g. Express/Local)
- Comprehensive category promotions
- Full country of Origin and Varieties (all SKU’s)
- Count and weight coverage
- 10 years of history available
- Real time fixture photographs
- Easy convenient presentable format

All tailored to meet the specific needs of your business and your customers = incremental £
“Produce View a Management Tool which offers unique data vs. the Internet Foragers”

- Price, Variety, Country of Origin, Count/size (where appropriate)
- True representation of what is on sale in store (vs. online)
- 10 Years of history, Real time store fixture photo capture
- All Major Multiples, M&S, Aldi, Lidl and Convenience formats
- Bespoke data collection service – one-off or periodic (weekly/monthly) e.g. Store Planogram Compliance/Availability
- Subscription or new bespoke weekly/monthly reports
- Independent and dependable backed
- Cost effective and significantly better value vs. the competitor set – information sheet available
Driving transparency and efficiency

PRODUCEVIEW is a wholly owned subsidiary of British Growers

PRODUCEVIEW is the affordable and unique solution to all your instore data needs

What PRODUCEVIEW offers is unique vs. the Internet

- Price
- Variety
- Country of Origin

True representation of what is on sale in stores (vs. online)

30% of sales

High-tech software that can answer big industry questions

Which retailer has the largest share of the market?

Which retailer has the lowest cost for a selection of items?

Who has the best inventory?

Who has the best seasonal products?

How do I compare against competitors?

How do I compare against my competitors?

Full country of origin and variety (all SKU's)

Count and weight coverage

30 years of history available

Real time, fast, easy to use

Every convenience data user needs

PRODUCEVIEW offers a wide selection of fresh, core, seasonal, pre-processed and prepared products from a comprehensive range of countries. The service has been in operation for 30 years and is available for the first 30 years.

We want to explore how the collection and dissemination of market data could be improved to increase transparency, encourage better communication and the sharing of information, and support efficient working across the supply chain.

New for 2018 British Growers bespoke category weekly and monthly snap-shot reports

Our unique category report service can be built around your specific needs

- Focused price trends and summary on the core SKU's for your category
- Broad world price (all SKU's) across multiple retail, M&G, discounters and convenience formats
- Weekly retail promotions
- Comprehensive category statistics
- Full country of origin and weights (all SKU's)

For an initial discussion on how British Growers and PRODUCEVIEW can cost effectively meet your data needs contact:

Mark Phillips e: Mark.Philips@britishgrowers.org

Available to take away
So What’s stopping you?

- Drop us a line to understand how Produce View and the British Growers Weekly/Monthly reports can benefit your business
- Web demonstrations and LPS Show Discounts available

Key Contact
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0777 501 7967
Mark.Philips@britishgrowers.org