

MINUTES OF THE FOOD AND DRINK WALES INDUSTRY BOARD
MEETING

8 March 2018

Item 1: Welcome, introductions and update from UK Food & Drink Sector Council – Chair

- Chair welcomed all to the meeting and welcomed LI as new secretariat, working with SP to support the Board
- AR noted the success of the Board engagement dinner held on 7 March in Cosy Corner, Porthcawl. A brief discussion followed regarding the key points which emerged from the previous night's discussions with producers, which were:
 - i. Costs and difficulties of logistics, getting small orders transported in a cost-effective way. DM noted that the work which is being done to look at novel solutions could help resolve this issue, particularly using the passenger train routes. This work is continuing.
 - ii. Development of the honey special interest group
 - iii. Experience of individual honey producers in working with ex-military personnel with mental health issues to train them to become beekeepers was of particular interest, fitting well with the skills agenda. MS noted a very positive experience of working with Help for Heroes
 - iv. MS suggested developing a Welsh ingredients masterclass highlighting how ingredients such as Welsh herbs, honey, salt etc could be used by manufacturers. DL noted that the directory of food producers has been launched and FIW will be compiling a food ingredients directory
 - v. DL noted that the Food Industry Centre will be hosting the first meeting of the honey cluster
 - vi. JF raised the issue of whether there should be an innovation strategy for Wales. DM noted that Project Helix is the innovation resource and that the NutriWales cluster is working with companies on R&D strategies. MS highlighted the opportunity for pre-competitive collaboration on environmental packaging. KP noted the work that WRAP and Courtauld has been doing on packaging. A discussion followed about how to define the innovation space. JF referenced the FDF innovation strategy.
- It was agreed to follow the same format for future Board engagement dinners
- AR updated the Board on the first meeting of the UK Food & Drink Sector Council which took place in January. AR attended this meeting which agreed the Council's Terms of Reference and 1st projects. The council will meet quarterly and has agreed the following workstreams: nutrition, export, logistics, agricultural productivity, packaging, skills,

innovation and sector deal. Members of the Council founding members will chair the workstreams. Working groups will support each workstream. KP noted link between nutrition workstream and Wales' obesity strategy.

- Board agreed that AR should continue to represent Wales on the UK Food & Drink Sector Council

Item 2: Minutes of the 8 December 2017 Meeting & Action Log

- The minutes were noted and accepted and the outstanding actions on the action log were reviewed and updated.
- DM noted that SeaFish and Cywain will work closer together to produce a joint strategy.

Item 3: Delivery Dashboard

- Delivery dashboard has been revised to reflect FDWIB workstreams
- DM highlighted key points from the Delivery Dashboard:
 - i. £6.9bn value achieved by December 2016 (published in Sept 2017), but note of caution around Brexit challenges ahead
 - ii. Provisional figures indicate exports have increased by 16% to £500m in 2017
 - iii. AR asked how much of the export increase is due to currency fluctuations. Difficult to assess this as export figures are based on HMRC data. A question could be included in the Cardiff Met industry survey
 - iv. Food Innovation Wales has published the food producers directory and the searchable online version
- KP noted that FSA have undertaken some research on food security in Wales
- DL raised a concern about cuts to local authorities and impact on environmental health and trading standards and the potential for a food crisis.
- KP noted the Sustainable Food Conference and Food Power Conference will both be held in Cardiff in June
- DM noted the remit of Russell Roberts in Brussels office to identify opportunities to develop EU funded projects such as Atlantic Area Food Export Programme

Item 4: Vision 2025, "Prosperity for All" Strategy

- AR noted that the FDWIB future strategy needs to connect to the WG "Prosperity for All" (PFA)
- SP circulated a document noting "Prosperity for All" objectives, Food Division contribution, and FDWIB contribution
- DLT noted that there are likely to be further statements about the PFA strategy

- AR reinforced the importance of all board members completing action 17 below
- SP noted that Vision 2025 workshop will be held in May

Item 5: 2018-2020 FDWIB Strategy

- AR reinforced the need to follow the strategy and ensure the Board delivers the individual elements

Item 6: People & Skills workstream update

- AR noted how pleased he was with the two skills conferences, the industry contributions received and levels of engagement
- JF noted the conference report was distributed as part of the FDWIB papers
- JF highlighted that over 30 Tasty Careers pledges were made and these are being followed up with a meeting to discuss next steps eg how to engage with schools, how to train ambassadors; each pledge maker will receive a certificate
- JF noted that a key action now is to understand the skills needs across the sub-sectors through engagement with industry skills partnerships and clusters. The outcome of this work will be a matrix of sectors/training requirements
- JF reported the further work with schools around a food challenge. This will be part of the Welsh Baccalaureate in secondary schools, and will tie into the entrepreneurial element of the Welsh Bacc. Aim is to have the food products ready in time for Taste Wales. There will also be a food challenge for primary schools
- DM suggested linking with SHEP programme
- KP suggested that the health boards/dietetics teams should be involved
- JF noted similar concerns about food safety training with different qualifications offering varying levels of quality.

Item 7: Customers & Markets workstream update

- ALW highlighted the activities being undertaken as part of the Customers & Markets workstream
- DM noted that some outcomes from the brand work are expected by the end of March
- ALW noted that Kantar are presenting at the Tuck In event on 17th May
- Members discussed horizon scanning in the context of this workstream, noting the Kantar data had limitations in looking at future trends.
- AE highlighted Food Futures Lab which looks at future trends and horizon scanning

- A further discussion was held about an innovation strategy (see action 5 above)

Item 8: Business & Investment Workstream

- HT updated the board on the Investor Ready programme which is being delivered as a follow on support programme after the Finance conference. A report was included in the board papers
- BIC Innovation is delivering this programme; LG summarised industry engagement with the programme to date and noted that Development Bank for Wales has made an investment in a food company which was as a result of the introductions made at the finance conference held in November 2016
- A discussion followed around lack of transparency about various sources of finance, including commercial and public sector sources such as Innovate UK. LG noted that a directory of fund providers was developed for the conference and this is being updated as part of the Investor Ready programme. A flowchart type document was felt to be a helpful addition to this
- It was noted that the First Minister announced the £50m Brexit Fund

Item 9: Drinks Industry Strategy

- BG was unfortunately unable to attend the meeting; therefore Mark Grant from Levercliff stepped in at short notice to update the board on the Drinks cluster activity
- NB's Welsh Wine Special Interest Group papers were circulated in advance of the meeting
- MG noted that three workstreams have emerged from the initial cluster meetings held in November: sales & marketing; operations & finance; people & skills. Workstream meetings were held in February, with over 60 next steps/mini projects identified from these meetings, including some which offer "quick wins" for the cluster.
- MG has met with Visit Wales to discuss opportunities offered by Wales Way
- The Drinks Cluster is represented on the board by BG and NB

Item 10: Communications & Engagement

- EJ provided an overview of communications activity about the skills conference and St David's Day activity. Highlights included:
 - social media activity around #TastyCareersPledge (one tweet resulted in approximately 5,500 impressions)
 - St David's Day TV/radio coverage included Saturday Kitchen, Sunday Brunch, Chris Evans Breakfast Show, Simon Mayo Drive Time (total combined reach of approximately 16m viewers/listeners)

- EJ prompted the Board to think about what engagement was required at the Royal Welsh Show
- SP noted that the Spring Festival (19th and 20th May) will feature skills
- It was suggested that a breakfast event on the Tuesday of RWS would work (not to clash with the HCC breakfast on Monday). Morning events were felt to work better than evening events
- SP and AR will meet Sara Jones from WRC on 20th March to discuss RWS activities

Item 11: Brexit Update, Economic Appraisal, Fit for Market

- Economic appraisal infographics were circulated as part of the Board papers
- DLT noted that £7bn target has nearly been reached and is likely to be exceeded by 2020. He also noted business survival rates in the Welsh food sector were better than UK stats, but the business birth rate is lower
- DLT highlighted manufacturing sub-sector points of interest such as the value contribution of grains & starch sector from 10 business units
- DLT also noted that the WG statistics department have allocated a dedicated food and drink resource to enable more frequent updates
- It was suggested that the sector specific statistics could inform future decisions about board representation. However, this discussion was postponed to be part of the Vision 2025 discussions
- JF reminded the board that some previous research had been carried out by Brookdale which looked at how embedded sectors were in Wales
- DM updated the board on the Fit for Market activities – 22-24 projects all being delivered before the end of March 2018
- SP noted that the WG Brexit team requested a ½ day meeting with members of the Board

Item 12 - Visit Wales discussion

- Lynette Newington (LN) from Visit Wales joined the meeting to present food and drink aspects of the Visit Wales strategy and activities
- LN highlighted future opportunities to promote food and drink in forthcoming events including Volvo Ocean Race, Qatar Partnership and The Wales Way
- LN, EJ and DM noted the much closer working relationship between the Food Division communications team and VW, with close engagement over St David's Day activities and joint content development, including food photography
- LN and EJ are already working together to plan St David's Day activities in 2019
- LN highlighted 2018 as Year of the Sea

- AR noted that it should be a 2 way dialogue/process between Food & Drink Wales communications and VW, with the Board's input into future communications campaigns

Item 13 – FDI & Exports

- Anne Reynish joined the meeting and explained her role to the board, along with current export programme
- Anne R gave an overview of Blas Cymru and noted the opportunities for sponsorship and that there will be a competitive process for producers to take part. It is aimed to have more overseas buyers at the event
- Anne R presented a draft of the FDI slide deck highlighting the opportunities for FDI in the food and drink sector

Item 14: Any Other Business

- MS restated the need to look at the use of plastics/packaging and for the Board to take a leadership position



ANNEX 1

ATTENDANCE

Andy Richardson (AR)
David Lloyd (DL)
Alison Lea-Wilson (ALW)
Huw Thomas (HT)
Katie Palmer (KP)
Marcus Sherreard (MS)
Annitta Engel (AE)
Justine Fosh (JF)

Officials

David Morris (DM)
David Lloyd-Thomas (DLT)
Suzanne Pomeroy (SP)
Enfys Jones (EJ)

Secretariat

Lara Israel
Linda Grant

Guests

Mark Grant (MG)
Lynette Newington (LN)
Anne Reynish (Anne R)

APOLOGIES

Keith Smyton (KS)
Andrew Martin (AM)
Buster Grant (BG)
Norma Barry (NB)
James Wilson (JW)