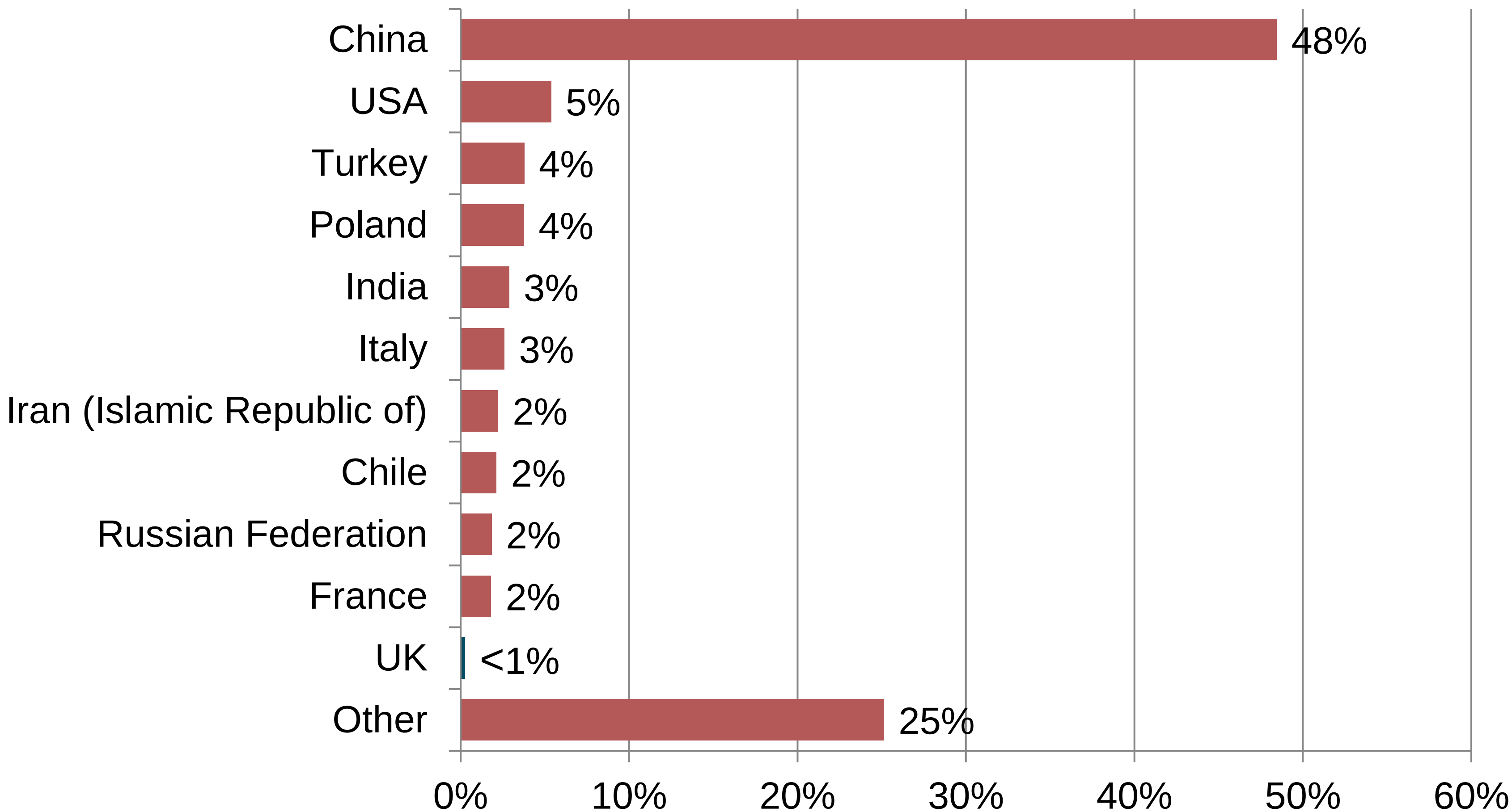
# UK production in a dynamic trade environment

**12th May 2022**

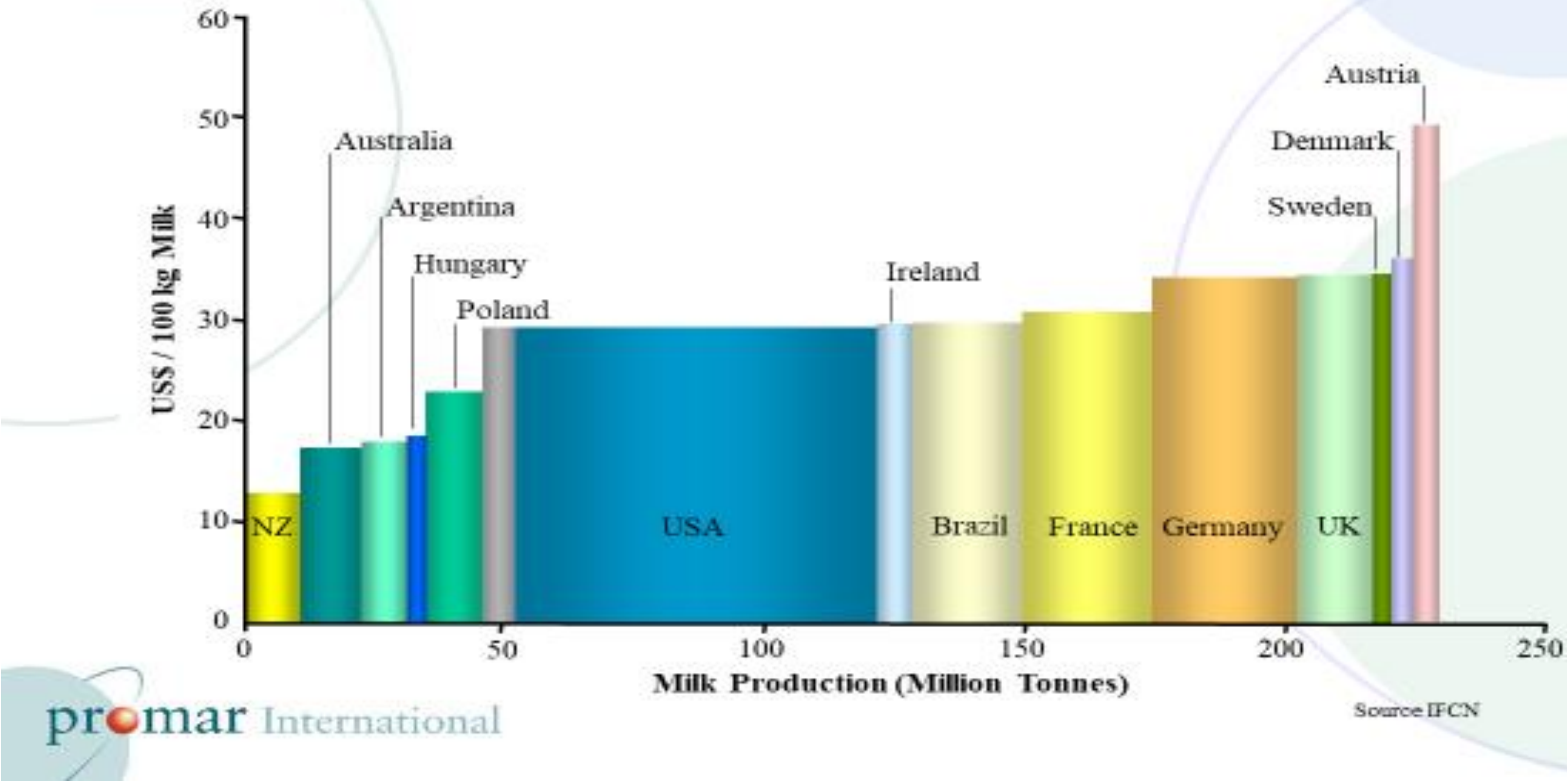
# What do we produce & how ?

# World apple production, 2021

## (source: USDA – base: 82 million tonnes)



# Global dairy cost curve



# Policy push

- Brexit & EU Farm to Fork
- UK Agricultural Bill
- Carbon Net Zero, 2050
- 25 Year Environmental Plan
- National Food Strategy

➢ Over time - all pointing in the same basic direction


TESCO
24 hrs

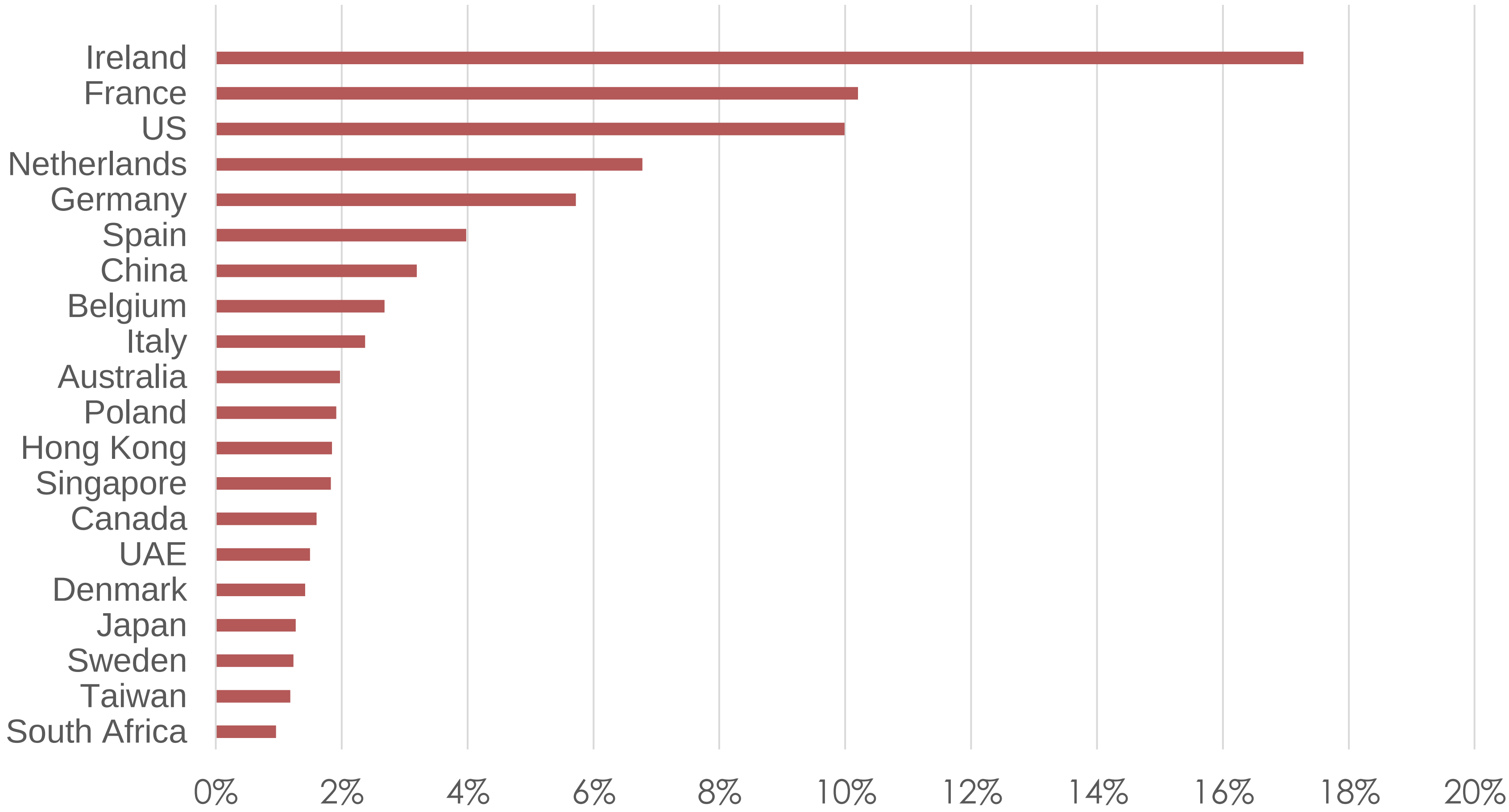

ASDA
24 hours


Sainsbury's


MORRISON

# Where do we export to & who else is out there ?

# Where do we export to ?
## (source: FDF/HMRC)



# International competition

BORD BIA
IRISH FOOD BOARD

Fonterra™
Dairy for life

LANDBRUG FØDEVARER
Danish Agriculture & Food Council

ASOEX
ASOCIACIÓN DE EXPORTADORES DE FRUTAS DE CHILE A.G.
"Juntos, nuestra fruta vale más"

mla
MEAT & LIVESTOCK AUSTRALIA

sopexa

Perú

TFPA

eib
AEGEAN EXPORTERS' ASSOCIATIONS

# What do they have in common ?

- Well funded
- Aspirational
- Focused on exports
- 5 year plans – clear priorities
- Hero products
- Exports are in the DNA

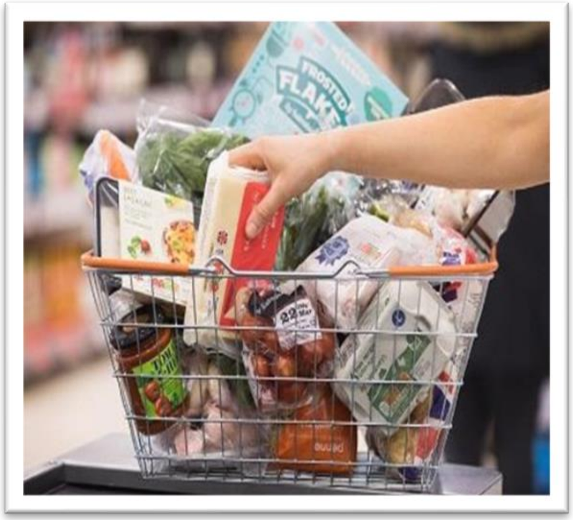
# Post Brexit

- ❑ Australia – 26 million consumers
- ❑ NZ – 5 million
- ❑ US – 330 million
- ❑ **Indian middle class – 400 million**
- ❑ **CPTPP - 500 million**
- ❑ **EU - 500 million**


# What really interests Oceania ?

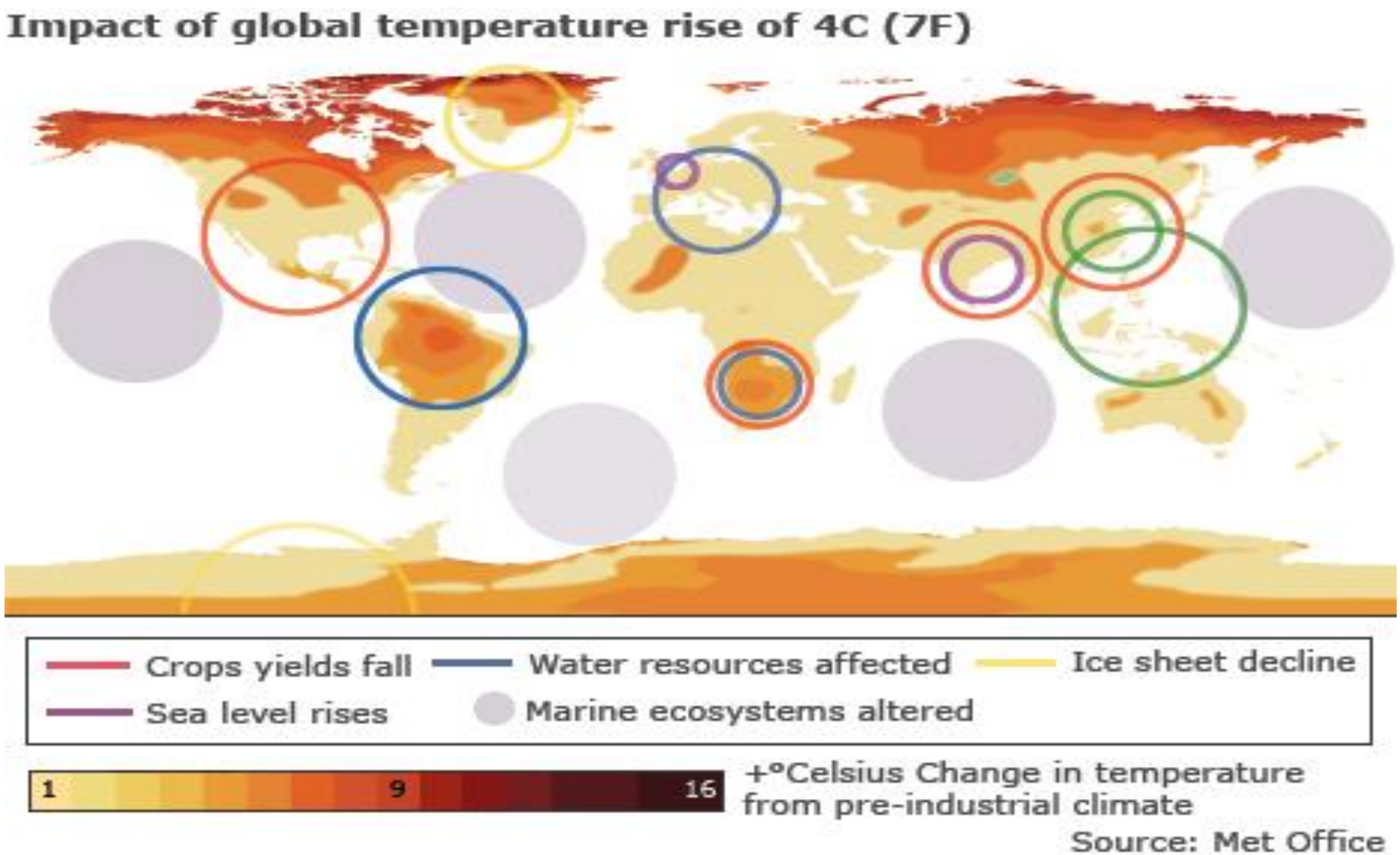
# A view.......

- Market access is one thing
- Market presence - is another thing altogether
- ***Ultimately*** - retailers, foodservice and consumers will decide
- As will other exporters............
- And works both ways.........



# Game Changers….

# Game changer 1



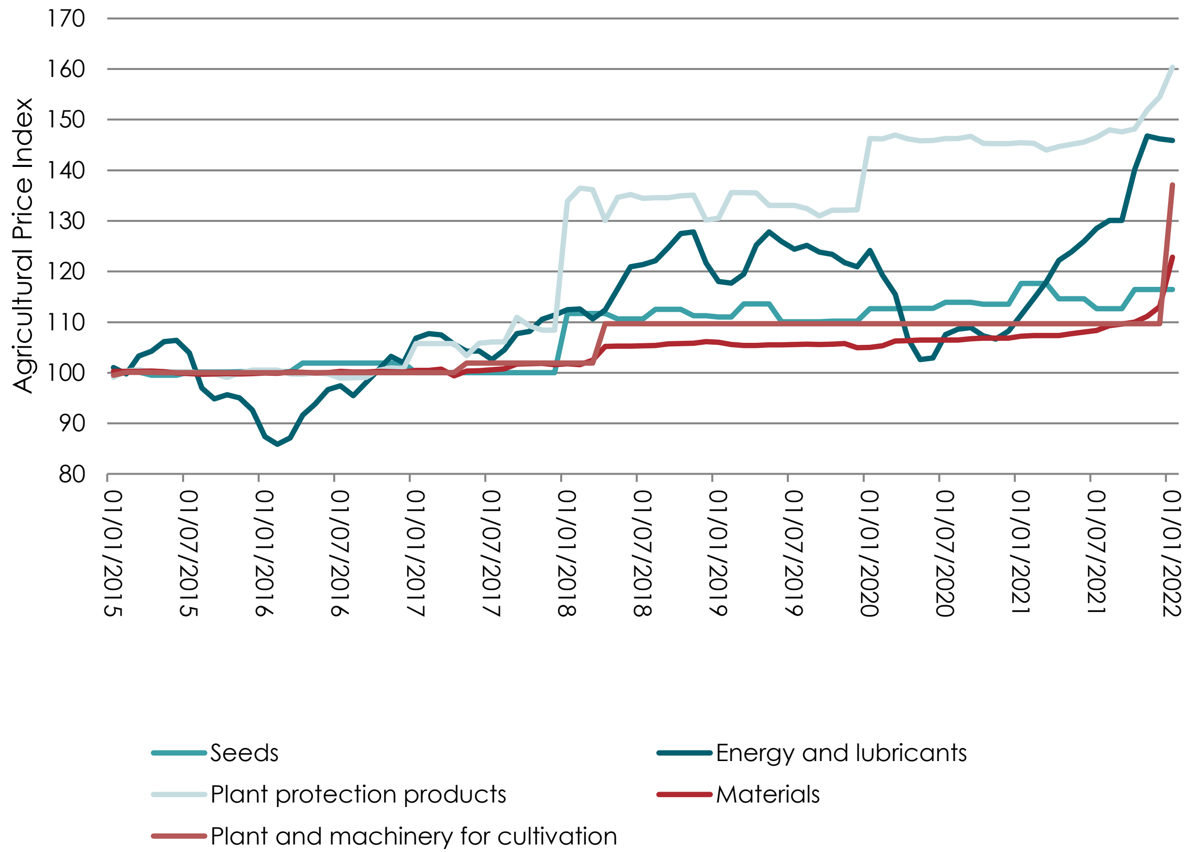
# Game changer 2

# The biggest game changer of all ?

# What does it all mean ?

# This cannot be ignored…..
## (source: Defra)

- Labour – availability as much as cost
- Local sourcing - or long distance
- Food security & sustainability



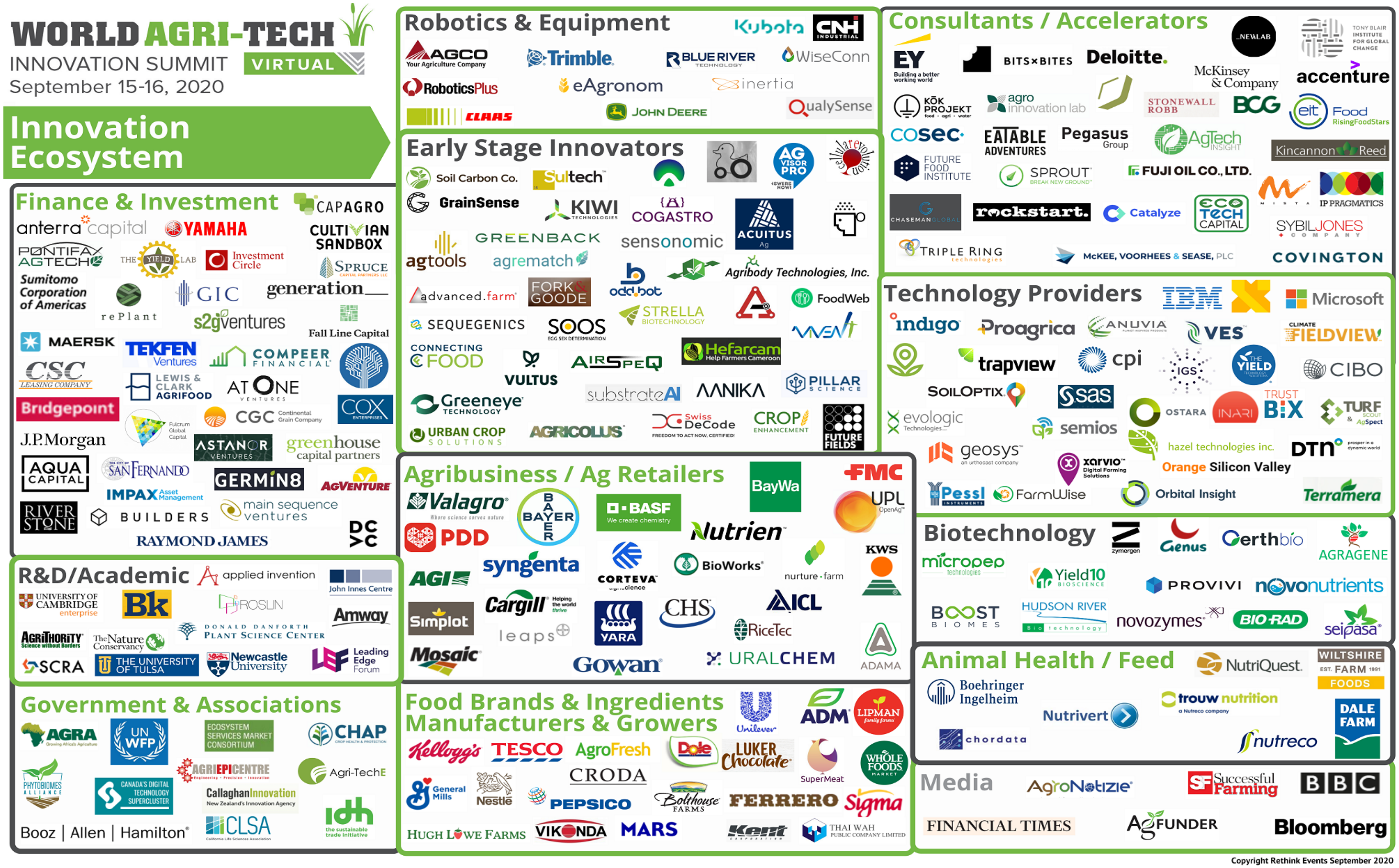
# Play to our strengths……no one can beat this…..


ASSURED FOOD STANDARDS

RSPCA ASSURED

SOIL ASSOCIATION ORGANIC

# Exports - we might even do better here ?



# Conclusions

- We are 1% of most agri food products & often high cost
- Ag Bill – direction of travel is clear
- New trade deals – going to “toe to toe” with the best - but not just about containers of cheese and meat
- UK - still a very good place to produce food
- More use of agri tech
- More sustainable farming and food
- Exports are for the best of class in a big, wide world – Asia, Africa, US etc
- UK – still a very attractive market
- More resilient, flexible, adaptable than ever before - Brexit, COVID & Ukraine

# More information

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