



Department of
Primary Industries and
Regional Development

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MOVING FORWARD TOGETHER

*Investigating and understanding the need for
Western Australian agrifood industry groups*

FINAL REPORT; V1.03; June 2022

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MOVING FORWARD TOGETHER

Investigating and understanding the need for Western Australian agrifood industry groups

Understanding of what Agrifood industry representation exists in Western Australia (WA) or has in the past. What is the gap in the market and what options a survey of global peers suggest and which established best practice models may be appropriate and can succeed in the WA context [DPIRD2022077; p10]

FINAL REPORT

June 2022

V1.03

This project delivers on three related modules of work: (1) a WA stocktake, (2) a review of global models and (3) a path forward

WA STOCKTAKE: WHAT DO WE CURRENTLY HAVE? WHAT HAVE WE TRIED IN THE PAST? GAPS?

(detailed in Appendix II, III)

WHAT IS THE POTENTIAL PATH FORWARD?

GLOBAL MODELS: WHAT IS PROVEN TO WORK ELSEWHERE (APPROPRIATE TO WA)?

(detailed in Appendix I)

1. What agrifood industry groups (including quasi-government agencies, formal and informal arrangements) are currently operating or have operated in WA? Who and where do they represent? What is their funding model? What services do they provide? What is their role or function?
2. Is there sufficient appetite from industry in WA to drive and fund a [potentially new] representative group with sufficient shared interests?
3. Is there a 'gap in the market' in WA identified through this stocktake?

7. How can WA industry action these findings to establish or reframe a food and beverage manufacturing industry group, including funding requirements, governance/structure, and critical factors of success?
8. Is there a role for government? If so, what level of support would be required and for what term to establish a sustainable business model?

4. What proven, successful global models of industry groups - that fit with the WA context - exist?
5. What are the details of these models? Can new models fill the gap in the market or assist existing organisations to better support the WA food and beverage manufacturing sector?
6. What are the funding structures of the identified models?

EXECUTIVE SUMMARY

BACKGROUND

The Department of Primary Industries and Regional Development's (DPIRD) Food Industry Development branch works alongside industry to support the growth of an internationally competitive Western Australia's (WA) food and beverage value added sector. In doing so, the department supports the State Government's priorities of creating more jobs, particularly in regional areas, and diversifying the State's economy through Diversify WA, DPIRD's Primary Industries Plan and Strategic Intent 2022-26. The Food Industry Development branch undertakes a range of activities including building the capability, support ecosystem, advocacy and representation of the WA food and beverage industry and promoting the buying of locally produced products.

Given the challenging and changing environment for the agrifood sector, it is timely to review the current WA landscape and investigate global best practice for industry associations or groups. This research will assist existing WA groups to assess their offering as well as offer a framework for DPIRD to understand how to best support industry.

PROJECT METHODOLOGY

This project was tasked with investigating and

understanding the need for a WA agrifood industry group and to identify global best practice models that could succeed in the WA context. To achieve this, the project conducted three independent strands of research.

First, it conducted a stocktake of current and past WA industry groups. The industry stocktake [detailed in Appendix II] identified over 300 organisations that could provide industry organisation-like services to parts of the WA agrifood value chain. Of this group, over 250 organisations provide direct coverage for some part of the WA agrifood industry value chain. In addition, many of the roles of an industry body can also be undertaken by other stakeholders and real overlap can and does occur. An additional 50+ organisations provide some form of direct support to the industry. The research also identified a range of past food and beverage industry groups [detailed in Appendix III] that have existed in WA.

Second, the project conducted a review of global peers to identify models appropriate for the WA context. Over thirty organisations [detailed in Appendix I] were identified in peer group regions across the Anglo-American world.

Finally, in parallel with the above, the project interviewed over twenty stakeholders, including many involved in current and past ventures in the state. These interviews provided much needed detail and colour to the present and past situation

in WA. The interviews were conducted on a confidential basis and we thank the participants for their thoughts and wisdom.

Based on the above, the project developed next steps and recommendations.

INSIGHT: FIVE CRITICAL FACTORS OF SUCCESS

While three separate strands of research were conducted, all three independently pointed to five critical factors of success for an industry body. While these factors of success were focused on a potential new WA food and beverage manufacturing industry organisation, they are remarkably universal and apply to all industry bodies and similar structures in developed markets. Successful industry organisations that "stand the test of time" deliver on all five identified drivers of success; the drivers reinforce each other. A successful organisation serving WA F&B manufacturers will need to deliver on these five identified critical factors of success.

First, a successful organisation will fulfil a real industry need in a stable niche in the business ecology. A successful organisation will address a clear gap in existing providers rather than duplicate or repeat the roles of others. It will achieve this by delivering on roles that are not done (or not done well) by existing organisations. In addition, it will serve this proven long-term need through time.

This is not to say an organisation will not adapt. We found numerous examples of organisations that had changed and adapted. For example, expanding from canned foods into frozen foods, then later into all packaged foods.

What is common is the service of a stable need (e.g. advocacy) rather than jumping from focus-to-focus or onto one-off hot button bandwagons. As one interviewee summarised: "It's important to have a clear vision and mission. When you know that, everything else falls in behind."

Second, a successful organisation will serve a large industry giving it the critical mass to survive and thrive. Successful industry organisations need to target a large group of potential members rather than being dependent on a very small group of members or member organisations. This scale acts to deliver the organisation a constant pool of new members, new supporters and new leaders. As an interviewee summarised it: "You need lots of medium and large firms to be able to survive. Small firms just won't pay."

Third, a successful organisation will address a coherent group with members that feel part of that group. Participating stakeholders must self-identify as members of the industry. When asked, they must say: "I'm in the... industry". When members are in the same group, they have clear shared issues, shared challenges and shared interests. This shared situation gives the group a strong sense of social

cohesion. It creates a group of peers that work together. It also creates a group that likes to socialise together, whether over a game of golf or a drink. As one interviewee summarised it: "To succeed firms in the group need a common interest."

Fourth, a successful organisation will provide valued roles and services ensuring members are happy to renew their memberships. Any membership organisation must provide value for money. But building on the point above, successful organisations are not just about money; they need significant volunteer time.

For this to happen, there must be an emotional reward, a social reward, to participating. The organisation must deliver benefits to members that exceed both the cost of membership and the time invested. As one interviewee summarised it: "It's very important to know what value you are giving members."

Finally, a successful organisation will have a robust funding model capable of paying its own way in the long run. An industry organisation - or any business, charity or similar - must operate with revenues greater than costs. While this sounds obvious, it is not always easy to do. Numerous historic industry organisations have disappeared, both in WA and elsewhere.

To achieve financial success, it must have enough members paying enough in membership fees. In addition, it should have multiple other independent income streams such as sponsorship, conferences, workshops, courses and/or advertising. The combination of these sources of revenue will support a robust organisation able to stand on its own without subsidies. An organisation that is able to survive long term. As one interviewee summarised it: "There is no way you can be reliant on government funding, you need to have a wide range of funds."

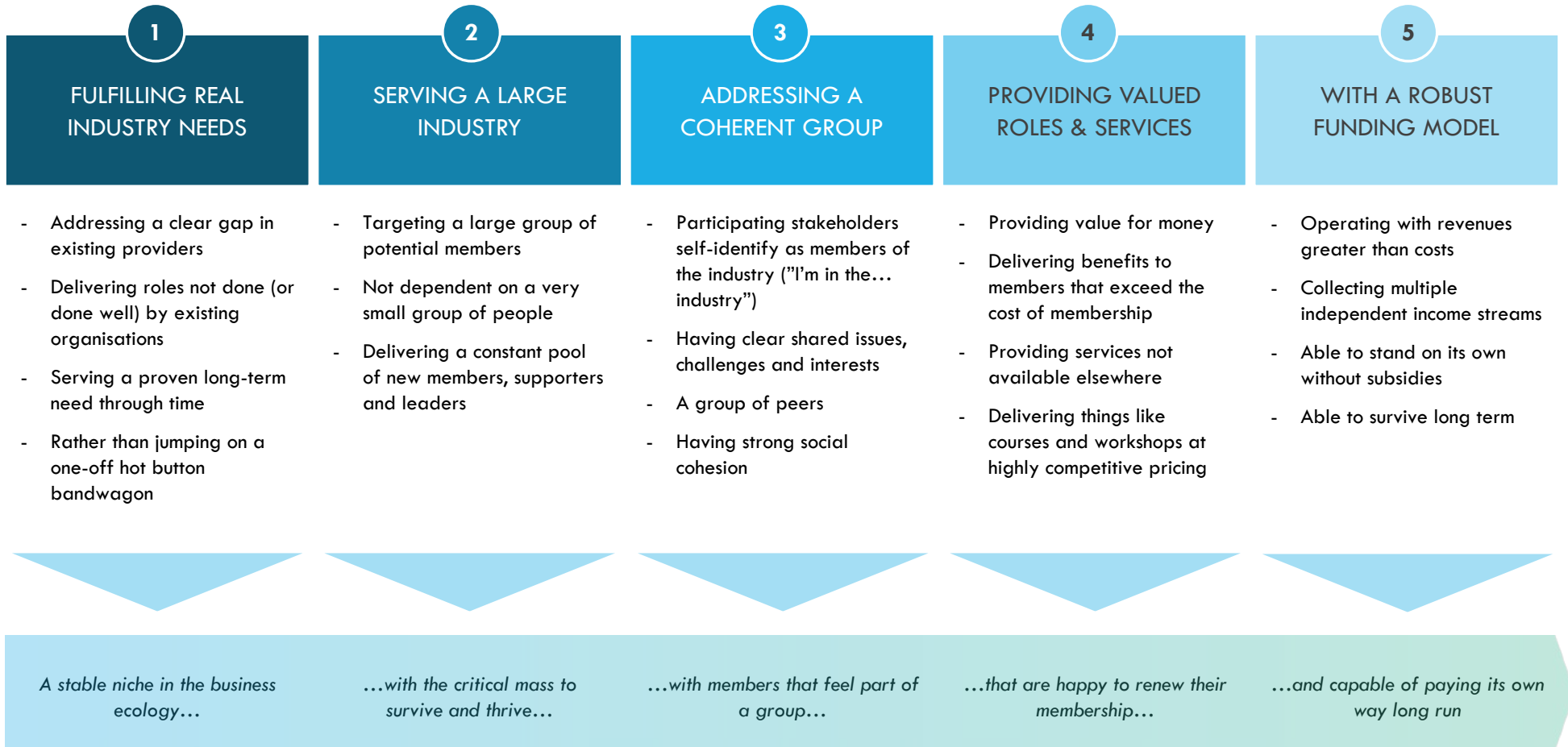
In summary, it is relatively easy to form a new industry organisation, particularly with some form of assistance from the government. It is hard to create an organisation that will last a hundred years, as the California League of Food Processors has done. Delivering on the five identified critical factors of success is the path to a long and fruitful existence.

REAL CHALLENGES EXIST

Any attempt to launch a new industry organisation targeting WA food and beverage manufacturers faces real challenges.

Successful industry organisations that ‘stand the test of time’ deliver on all five identified drivers of success; the drivers reinforce each other

WHAT ARE THE DRIVERS OF LONG TERM SUCCESS FOR AN INDUSTRY ORGANISATION?



CHALLENGE: WESTERN AUSTRALIA IS MOSTLY SMALL FIRMS THAT LACK SCALE

WA has a large overall agrifood sector made up of a huge range of firms. WA has over 13,000 farming businesses, over 1,000 fishing businesses, over 1,000 F&B manufacturers, over 1,300 agriculture and food-related wholesalers, around 90 fruit & vegetable packhouses, almost 400 store-based bakeries, over 8,900 hospitality businesses and over 2,300 food and beverage retailer businesses.

However, when we focus in just on food and beverage manufacturing, we find WA currently has a small number of large firms and a large number of small firms. In rough numbers the industry structure is 50/100/850: 50 large firms (with revenue over \$10m), 100 medium sized firms and 850 small firms.

These Australian Bureau of Statistics (ABS) numbers exclude small scale food and beverage processing that occurs elsewhere, for example on a property that's primary source of income is farming. However, there are no indications that these primarily on-farm operations – where food manufacturing accounts for less than 50% of farm revenue - are anything other than small as well.

CHALLENGE: WESTERN AUSTRALIA HAS A SMALL NUMBER OF LOCAL LEADERS/CHAMPIONS

WA has a tight group of about fifty large food and beverage manufacturing firms with revenue over ten million. These firms are primarily either regional production centres of major multinationals (e.g. Lactalis/Parmalat, the world's largest dairy company) or export focused firms in traditional minimally processed ingredients (e.g. WAMMCO). The handful that break this mould include local leaders like D'Orsogna, Anchor Foods, Mrs Macs, Milne Agrifoods, Craig Mostyn Group and Vesco Foods. As large firms at scale focused on adding value to local raw materials, these firms paint the path forward for the state. But at this point in time, there are relatively few of them.

CHALLENGE: WESTERN AUSTRALIAN F&B IS FRAGMENTED RATHER THAN CLUSTERED

The WA food and beverage manufacturing sector is currently fragmented. This fragmented industry structure is the result of some of the specific characteristics and history of WA strongly influencing industry evolution (known as "path dependence" in economics). As a result of this environmental development, food and beverage manufacturers in WA are a mix of (1) smaller firms primarily serving the regional market (typically protected from competition in some way), (2) primary processors of ingredient raw materials at scale (e.g. lamb), and (3) an emerging group of innovative leaders achieving strong growth in East Coast and export markets. In numerical terms, the state has primarily created firms that by-and-large

supply the local market (option 1 above) in somewhat defensible niches or segments (e.g. highly perishable products).

As a result, WA has a diverse range of primarily small firms supplying a diverse range of markets (markets a, b, c) rather than one or more clearly dominant clusters (firms x1, x2, x3 all serving market a). As a contrast, the dense clustering of value-added grain processors at scale around Minneapolis, Minnesota is a real world example of the second model. While it is clearly the path forward, this second model does not yet exist in WA.

SELF-FUNDING IS A GREAT IDEA IN AN IDEAL WORLD

In an ideal world, WA would emulate larger peer group regions (for example Ontario, California, Manitoba and Alberta) and have a large, self-funding food and beverage manufacturing organisation that would be viable and exist in the long run without government support. This is not a completely impossible dream. The experience of both (1) other sectors in the state (e.g. pork) and (2) other peer group regions of the world (e.g. Manitoba) show that a self-funding regional food and beverage manufacturing industry organisation is theoretically possible.

First, a wide range of other WA agrifood sectors beyond manufacturing support industry organisations. In addition, some sub-sectors of food and beverage manufacturing support a WA based industry organisation (e.g pork processing has the WA Pig Producers Association, albeit focused on producing in the main part).

However, many of these organisations rely on government mandated levies (and other forms of government support) to fund industry good activities, particularly research and development. Levies make no sense in food and beverage manufacturing - and are not used in any peer group region - due to the lack of a shared R&D agenda (what are the common problems of Huon Aquaculture and Kraft Heinz?) and the lack of a need for generic industry-level marketing (what help does Coca-Cola need with external marketing support?).

Second, a wide range of peer group regions across the Anglo-European world support a self-funding regional food and beverage manufacturing industry organisation. Many, possibly most, states, provinces and regions across Canada, the United States and the United Kingdom support some form of organisation.

UNLIKELY TO PASS A MINIMUM THRESHOLD

WA has an exciting, diverse and growing food and beverage manufacturing sector. Unfortunately, at this point in its development, this group is

fragmented and lacks the scale to self-fund a traditional industry organisation. There are just not enough food and beverage manufacturing firms with enough revenue to afford enough membership fees to make a self-funding industry organisation work.

The experience of strong peer regions elsewhere in Australia and in Canada suggest that a minimum size threshold in terms of number of large firms exists to support a self-funding food and beverage manufacturing organisation.

For example, in Saskatchewan, a major grain producing region in Canada with 300 food processors [this Stats Canada definition appears to exclude firms under \$1m], the Saskatchewan Food Processors Association failed having only attracted 140 member companies. In contrast, just next door in neighbouring Manitoba, another major grain producing region, this time with 740 food processors, Food & Beverage Manitoba continues to exist and self-fund through fees from about 300 members.

WA, with about 150 medium and large firms, appears to look more similar to Saskatchewan (300 medium/large) than Manitoba (740 medium/large). It appears under the threshold.

The failure of numerous past attempts in WA at building an organisation in this space - for a wide range of reasons - is additional support for the hypothesis that the current industry cannot support

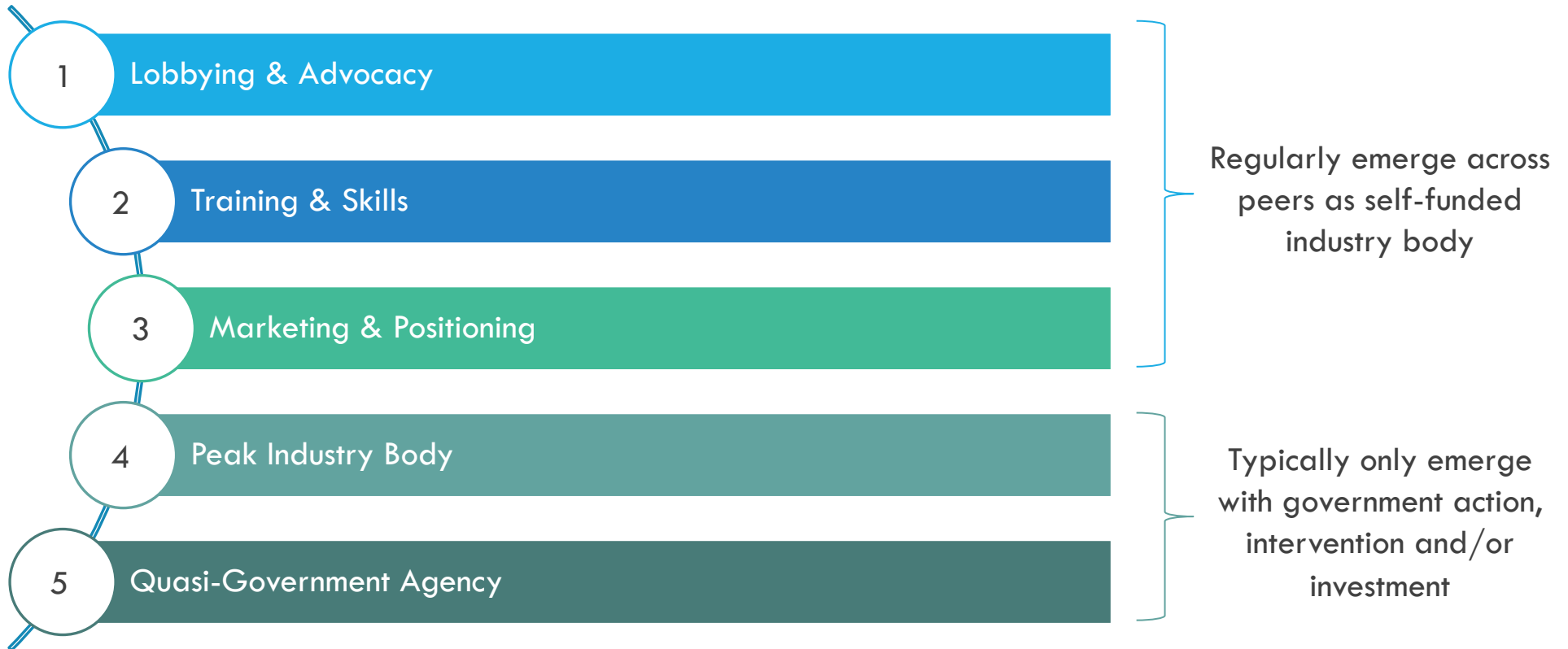
a self-funding organisation. As one interviewee suggested: "The F&B sector is too small and fragmented, our organisation was constantly looking for funds."

FIVE MODELS OF INDUSTRY GROUPS

Five global models were identified by the research and their potential for WA investigated theoretically. Five models, each with a different focus of support to the F&B manufacturing industry. Under ideal conditions (as discussed above), three of these can self-fund (Lobbying/Advocacy, Training/Skills and Marketing/Positioning), one (Peak Industry Body) can be thought of as an industry body mega-merger, and one (Quasi-Government agency) requires government engagement and an active and ongoing role.

Two of the self-funding models - Lobbying/Advocacy and Training/Skills - appear to be unable to achieve the required minimum critical mass in WA to deliver a compelling service offer. Both could potentially "limp along on life support" with some aggressive assumptions about membership levels. However, it is questionable whether the WA industry would continue to fund an organisation that was not delivering real results in the long run or based on clear industry needs. The best case self-funding scenario for either is the emergence of something similar to Food Industries Association of Queensland (FIAQ) [reviewed in Appendix I]. Achieving results beyond "life support" would require government funding.

Five global models were identified by the research and their potential for WA investigated



MODEL 1 - LOBBYING/ADVOCACY

The Lobbying/Advocacy model lacks enough large WA based firms to provide both the funding and the loaned team members needed to make this model work well. Under this model, large firms pay the bulk of membership fees. Beyond funding, successful global models (e.g. Ontario, California) are driven by working groups and sub-committees staffed with team members loaned from large member organisations.

Only large organisations have the "strength on the bench" required to be able to loan skilled specialists (e.g. Logistics Manager) to industry good activities. WA lacks a deep 'bench' of the required specialists at large firms available for loan to any new body.

In addition, the industry shows signs of "industry-group fatigue" coming from the sequence of past failed ventures. While many interviewees acknowledged the need for a Lobbying/Advocacy group, they also acknowledged the historical failures in particular in terms of groups lack of cohesion.

MODEL 2 - TRAINING/SKILLS

There are clear needs that could potentially be served by the Training/Skills model. Food and beverage manufacturers need a range of specialised skills, such as selling into retail, winning

in foodservice/hospitality channels, efficient supply chain management, and managing innovation in a fast moving environment. Unfortunately, the cost of developing bespoke courses serving these needs would be more than could be recovered from the limited number of WA members. At the same time, other providers, both in the state and at a national level, are strong in this space.

Both global peers and past attempts to implement this model in WA have easily descended into "wine and cheese" events with "educational seminars" that could be better described as sales pitches put on by regional suppliers seeking to sell their products and services.

MODEL 3 - MARKETING/POSITIONING

The awards-focused Marketing/Positioning model appears to have a sufficient target market to self-fund if it were to reach beyond food and beverage manufacturing into foodservice, hospitality and food retailing. This model focuses on small and medium businesses that would see the most benefit. Larger firms are more interested in their own marketing and branding plans and programs.

However, there are already a range of other awards in the state. The success of this model would be highly dependent on the skills of the founders and sufficient support in the early days to get a new, unknown award off the ground such that it

was recognised and sought out by consumers while attracting enough members to pay the bills. There is no easy answer to solving this acute "chicken-or-the-egg" problem.

MODEL 4 - PEAK INDUSTRY BODY

The Peak Industry Body model appears to serve a real need. Hypothetically a peak industry body could emerge from a mega-merger of existing industry bodies getting together to reduce costs and increase services, while retaining their separate identities, focus and memberships. A WA peak industry body in the form of an organisation of organisations (the Danish/Quebec model) is a real possibility. However, significant further work and in-depth discussions would be required to even gauge the possibility of "herding cats" into a common cost sharing structure. Further government effort would appear to be required to encourage this idea to move forward in any timely fashion. In practice, initial success in a WA context might be 30-40% of industry on board (rather than the 80%+ which is global peer group best practice).

MODEL 5 - QUASI-GOVERNMENT AGENCY

Finally, creating a Quasi-Government Agency focused on agrifood/food and beverage manufacturing is relatively easy and straight forward in many ways. Forming a quasi-government agency similar to Food South Australia would, in practice, effectively involve pushing a range of economic development roles currently inside DPIRD into a daughter entity under a separate brand. Having this organisation deliver results beyond business-as-usual is the challenge. Any new organisation would require broad, cross-party political support, with enduring and constant funding, to survive in the long run.

CONCLUSIONS

The five critical factors of success provide a framework for both existing and new or emerging industry organisations (and similar groups) to assess their offering/positioning against. However, the absence of these five fundamental critical factors of success in the WA food and beverage manufacturing sector strongly suggests that any attempt at a new industry organisation targeting food and beverage manufacturing will struggle to succeed in the long term.

In an ideal world, WA would be able to emulate larger peer group regions (for example Ontario, California, Manitoba and Alberta) and have a large, self-funding food and beverage

manufacturing organisation that would be viable and exist in the long run without government support. While the state has an exciting, diverse and growing food and beverage manufacturing sector, unfortunately at this point in its development, this group is fragmented and lacks the scale to self-fund a traditional industry organisation. There are just not enough food and beverage manufacturing firms with enough revenue to afford enough membership fees to make a self-funding industry organisation work.

Given this WA context, DPIRD has stepped in to offer many of the roles and services typically delivered by an industry organisation. This is required at this stage of WA's industry development, but perhaps a review of how this activity is communicated to industry and how this could be improved upon is warranted to ensure those businesses looking for this kind of support know where to find it.

DOCUMENT STRUCTURE / AGENDA

KEY QUESTION

DETAILS/SUB-QUESTIONS

What problem are we trying to solve?

- What is the WA context for this project? (e.g. diverse, geographically spread out, majority small and medium size enterprises)
- Is there a 'gap in the market' in WA identified through this stocktake?

Do we need an industry organisation focused on WA food and beverage manufacturing?

- Why have past organisations failed? What are the critical factors of success?
- Is there sufficient appetite from industry in WA to drive and fund a [potentially new*] representative group with sufficient shared interests?

What are our options for an industry organisation focused on WA food and beverage manufacturing?

- How can WA action these findings to establish (or reframe) a WA food and beverage manufacturing industry group, including funding requirements, governance/structure, and critical factors of success?
- What are the details of proven, successful global models adapted to fit with the WA context of diverse, geographically spread out, majority small and medium size enterprise? What is a clear framework for WA to follow based on these models? How can new models either fill the gap in the market (or assist existing organisations) to better support the WA food and beverage manufacturing sector?
- What are the short, medium, and long-term funding structures of the identified models?
- Is there a role for government? If so, what level of support would be required and for what term to establish a sustainable business model?

APPENDIX I – GLOBAL MODELS
What does best practice look like?

- What proven, successful global models of industry groups - that fit with the WA context of diverse, geographically spread out, majority small and medium size enterprises - exist?

APPENDIX II – WA STOCKTAKE
What do we have currently?

- What agrifood industry groups (including quasi-government agencies, formal and informal arrangements) are currently operating in WA? Who and where do they represent? What is their funding model? What services do they provide? What is their role or function?

APPENDIX III: PAST WA GROUPS
What have we had before?

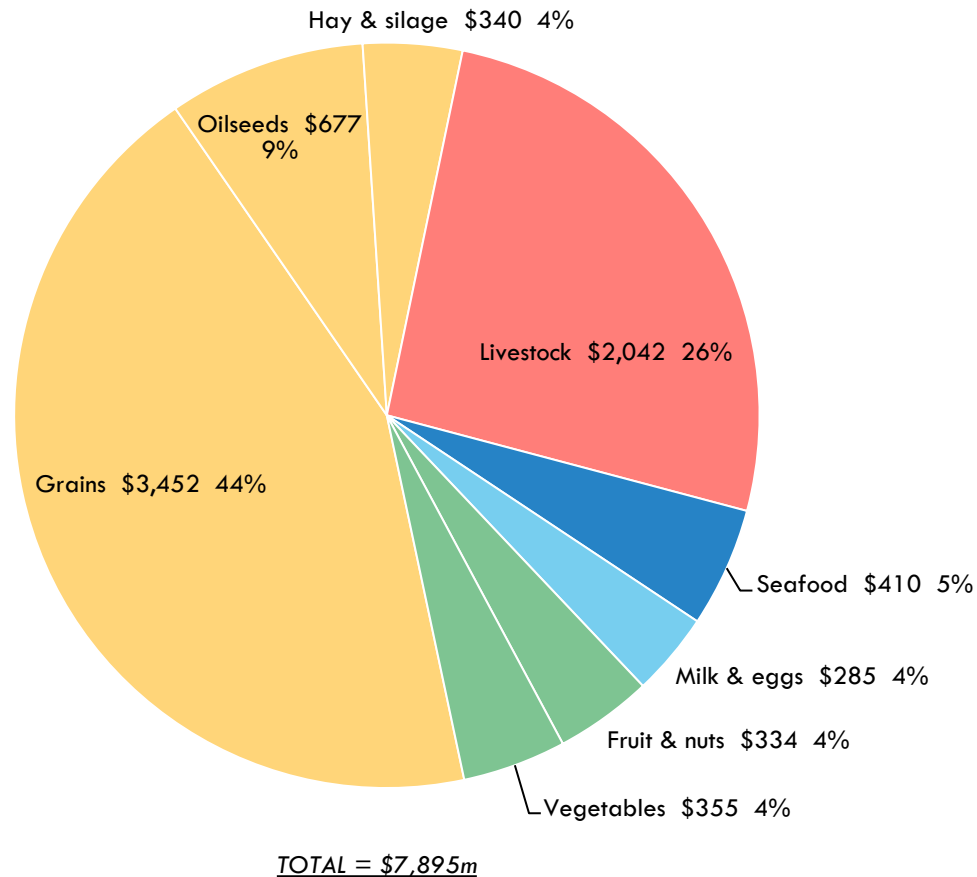
- What agrifood industry groups (including quasi-government agencies, formal and informal arrangements) are currently operating or have operated in WA?

Western Australia has a solid and growing food and beverage industry in place that is moving in a clear strategic direction towards more added-value

- Western Australia produces a wide range of raw ingredients on-farm suitable for further processing into consumer-ready foods and beverages
- Western Australia has a large, modern, well-developed agrifood industry, with raw materials flowing from production through to markets; however, while the state has a mature production base, at the same time it has an immature value adding transformation base
- Western Australia has a diverse food and beverage manufacturers – with activities across all sector – totalling around 1,360 firms
 - The number of food and beverage manufacturing firms in Western Australia has been growing over the past decade
- Adding value to existing production is one of three key drivers available to increase the turnover of Western Australian agrifood industry
 - Transforming Western Australian ingredient raw materials into finished packaged foods & beverages has huge potential to add significant value

Western Australia produces a wide range of raw ingredients on-farm suitable for further processing into consumer-ready foods and beverages

GROSS POST FARM GATE VALUE OF AGRIFOOD COMMODITIES PRODUCED IN WA A\$m; 2019-20 or as available

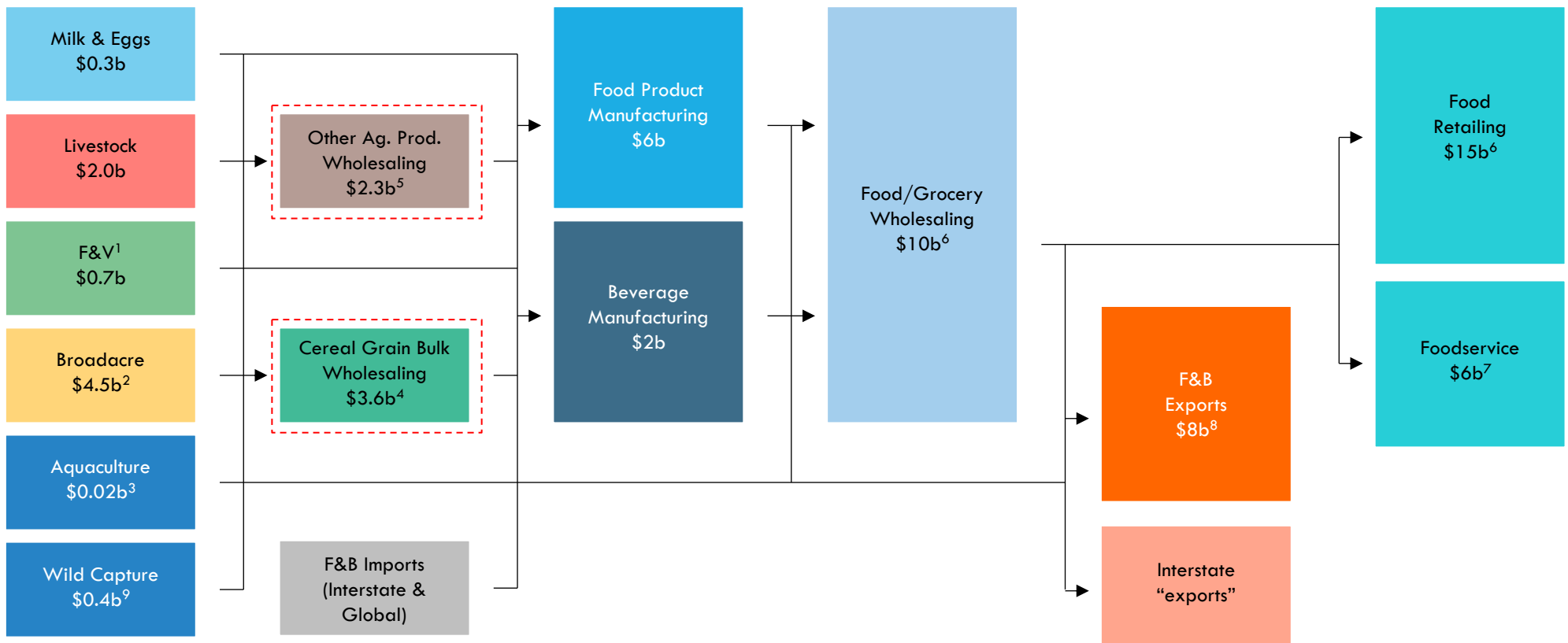


Note: Livestock excludes wool, seafood includes aquaculture but excludes pearls; produce excludes non-edible horticulture (e.g. flowers, turf); vegetables uses 2017/18 (latest available); grains includes pulses; Source: Abares AU Fisheries & Aquaculture statistics 2020; ABS Value Ag Commodities Produced 2019-20 (7503.0); Coriolis analysis

Western Australia has a large, modern, well-developed agrifood industry, with raw materials flowing from production through to markets

PRELIMINARY
Includes significant estimates

TURNOVER ACROSS STAGES OF THE WA AGRIFOOD/FOOD & BEVERAGE INDUSTRY A\$b; 2020 or as available

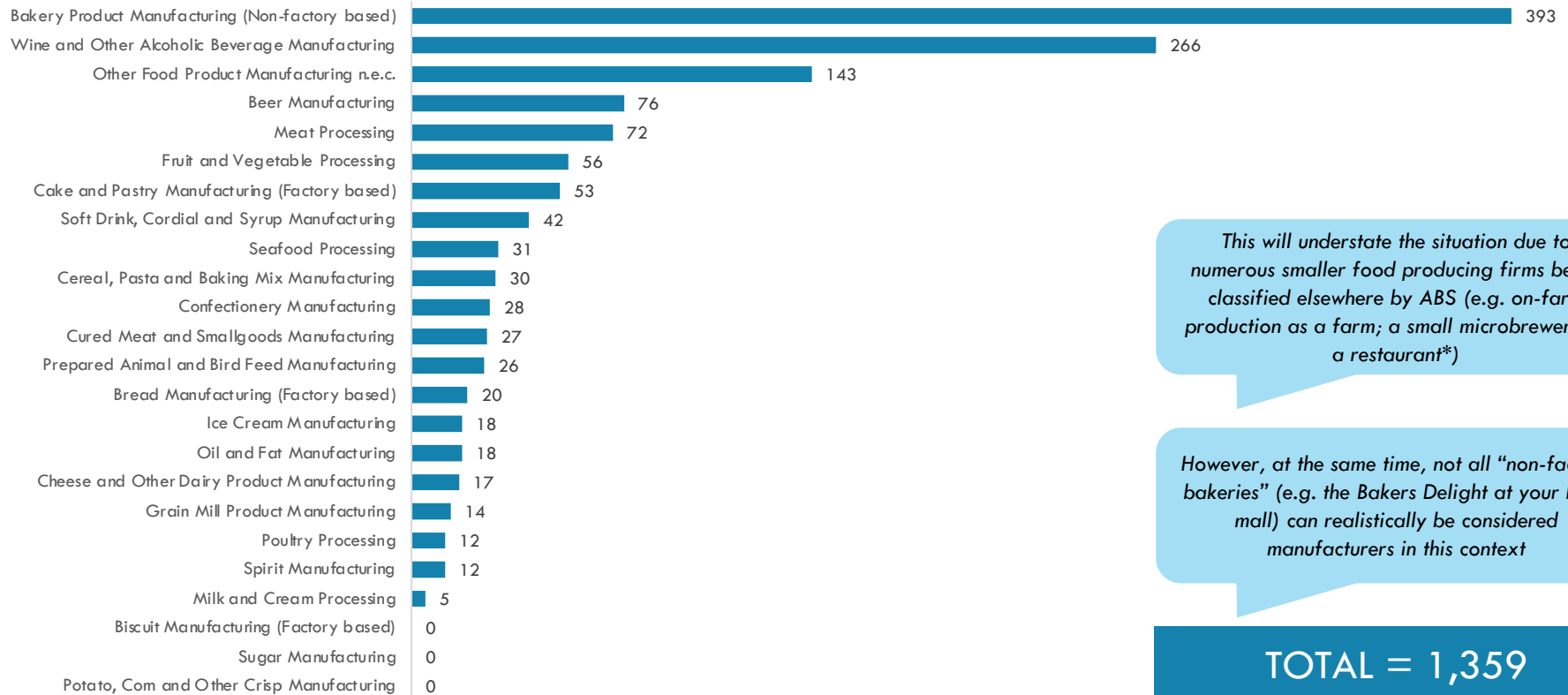


1. excludes flowers/nursery; 2. includes hay; 3. excludes pearls; 4. Coriolis estimate based on CBH=90% (website); 5. Coriolis estimate; excludes wool; and other non-food; 6. Coriolis estimate will include non-food sales (e.g. shampoo); 7. Coriolis estimate; 8. DPIRD WAAFFFI 2016/17 data (latest available); 9. excludes wild capture outside WA waters; Source: Abares AU Fisheries & Aquaculture statistics 2020; ABS Value Ag Commodities Produced 2019-20 (7503.0); DPIRD WAAFFFI; previous Coriolis work; Coriolis estimates and analysis

Western Australia has a diverse group of food and beverage manufacturers – with activities across all sector – totalling around 1,360 firms

WA F&B BUSINESSES BY INDUSTRY CLASS BY TURNOVER SIZE RANGES

Count; actual; as of YE June 2020



This will understate the situation due to numerous smaller food producing firms being classified elsewhere by ABS (e.g. on-farm production as a farm; a small microbrewery as a restaurant)*

However, at the same time, not all “non-factory bakeries” (e.g. the Bakers Delight at your local mall) can realistically be considered manufacturers in this context

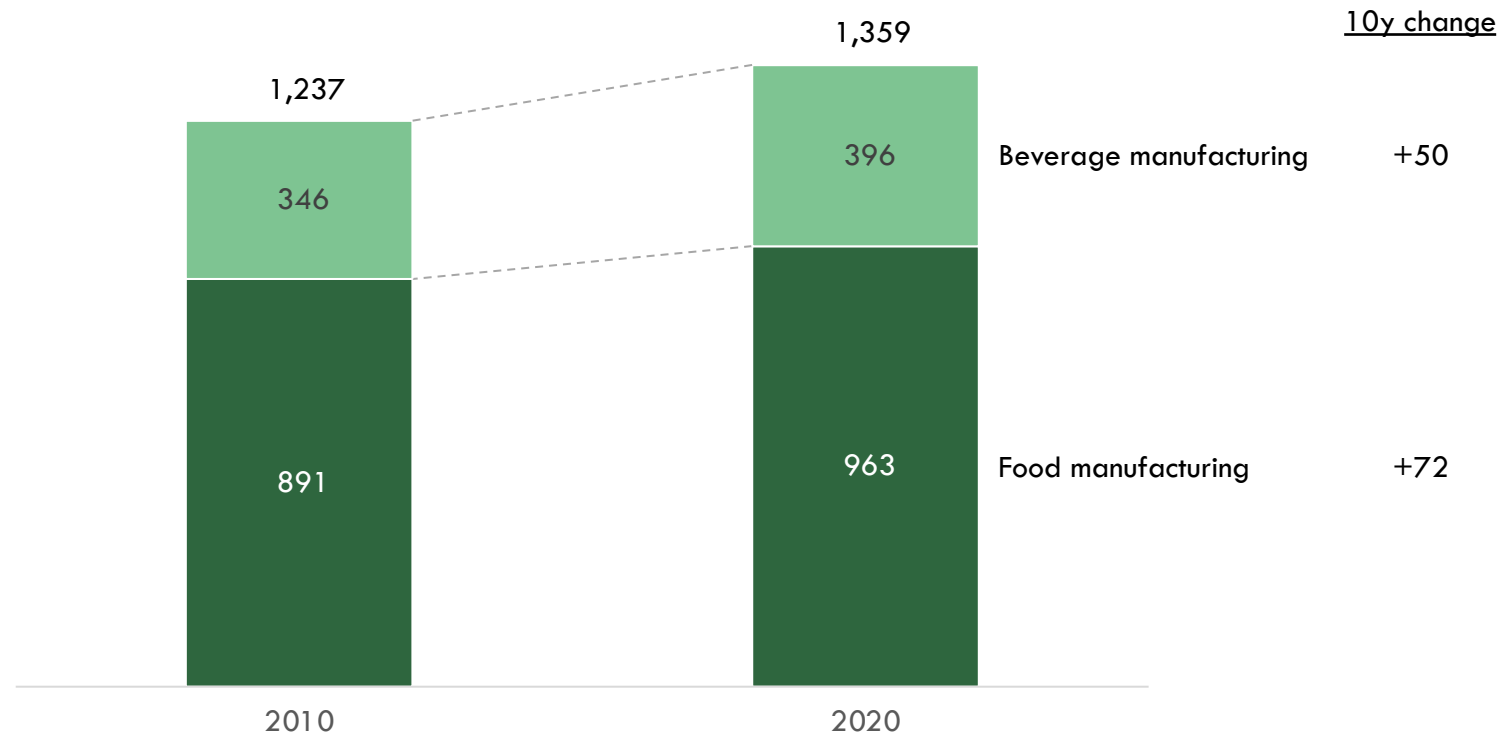
TOTAL = 1,359

* ANZSIC classification is based on the nature of predominant (51%+) business activity; Source: ABS (8165.0); Coriolis analysis

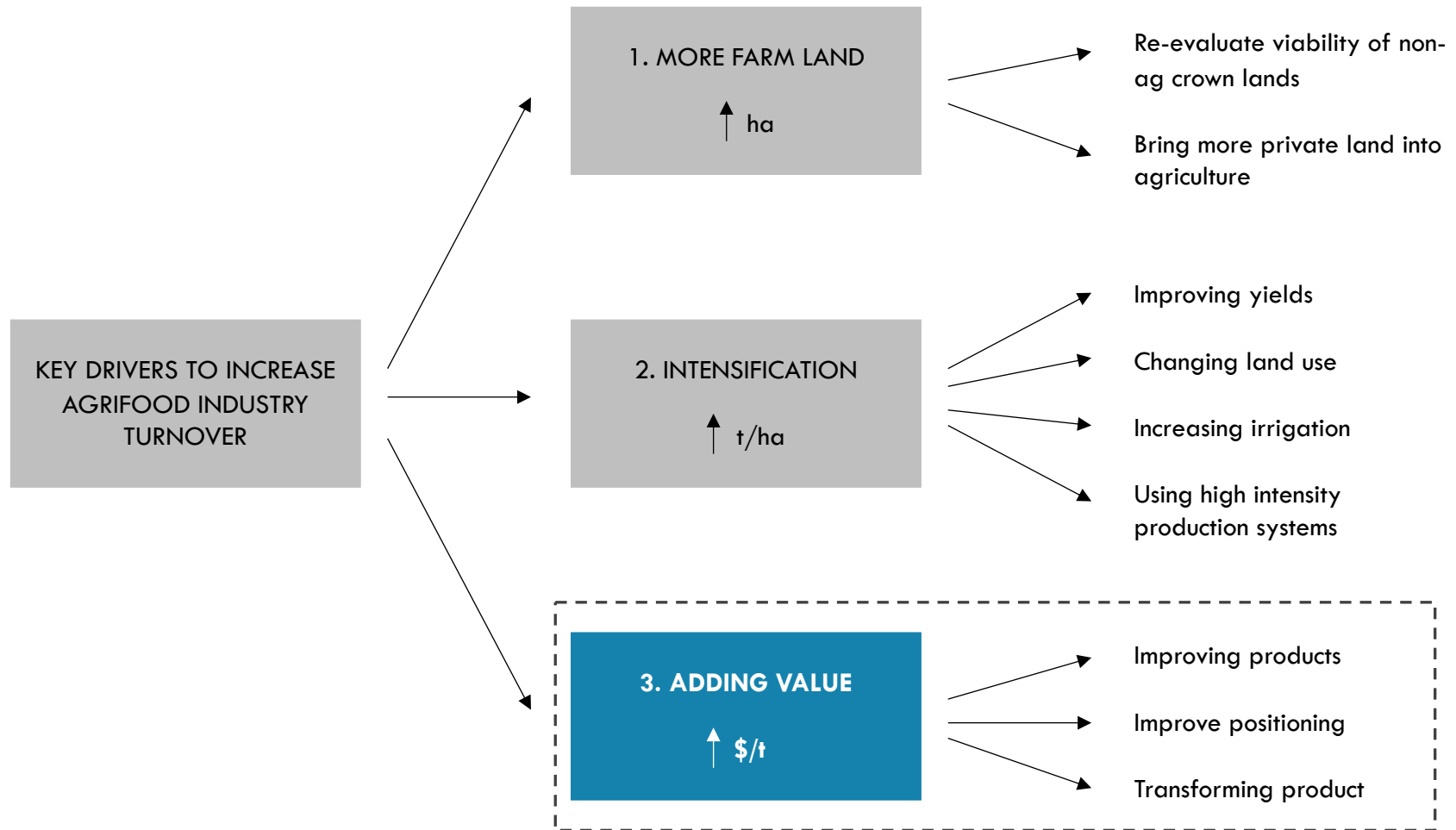
The number of food and beverage manufacturing firms in Western Australia has been growing over the past decade

NUMBER OF F&B MANUFACTURING FIRMS IN WA BY SEGMENT

Count; actual; as of YE June 2010 vs. YE June 2020

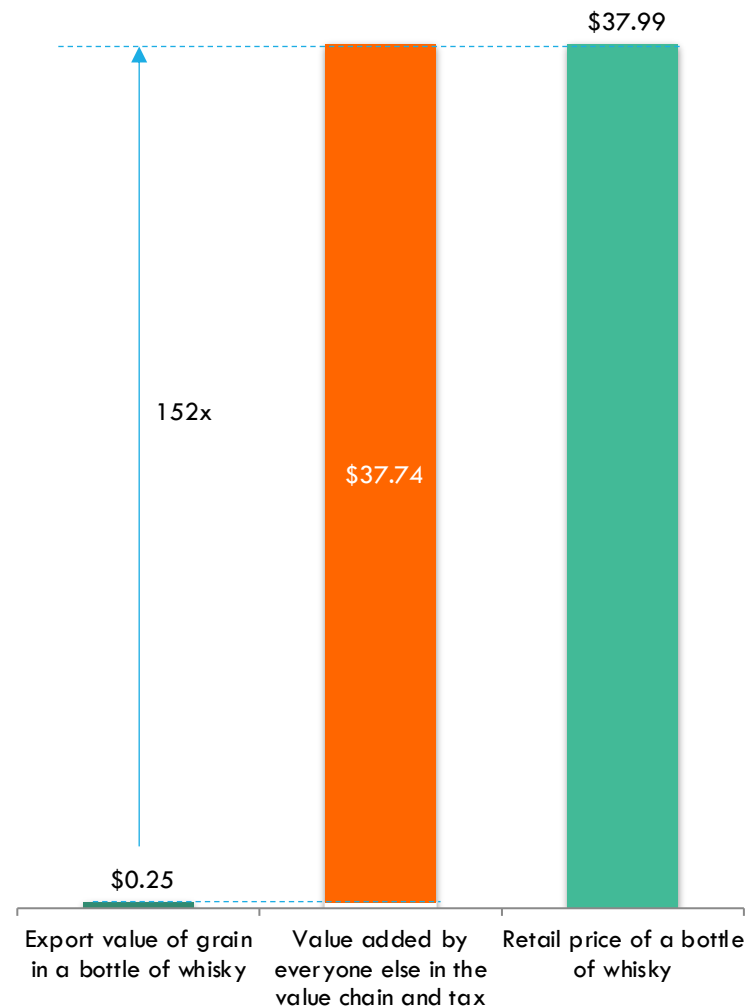


Adding value to existing production is one of three key drivers available to increase the turnover of Western Australian agrifood industry



Transforming Western Australian ingredient raw materials into finished packaged foods & beverages has huge potential to add significant value

Western Australia exports
\$2.8b worth of this



Scotland exports
\$6.8b worth of this



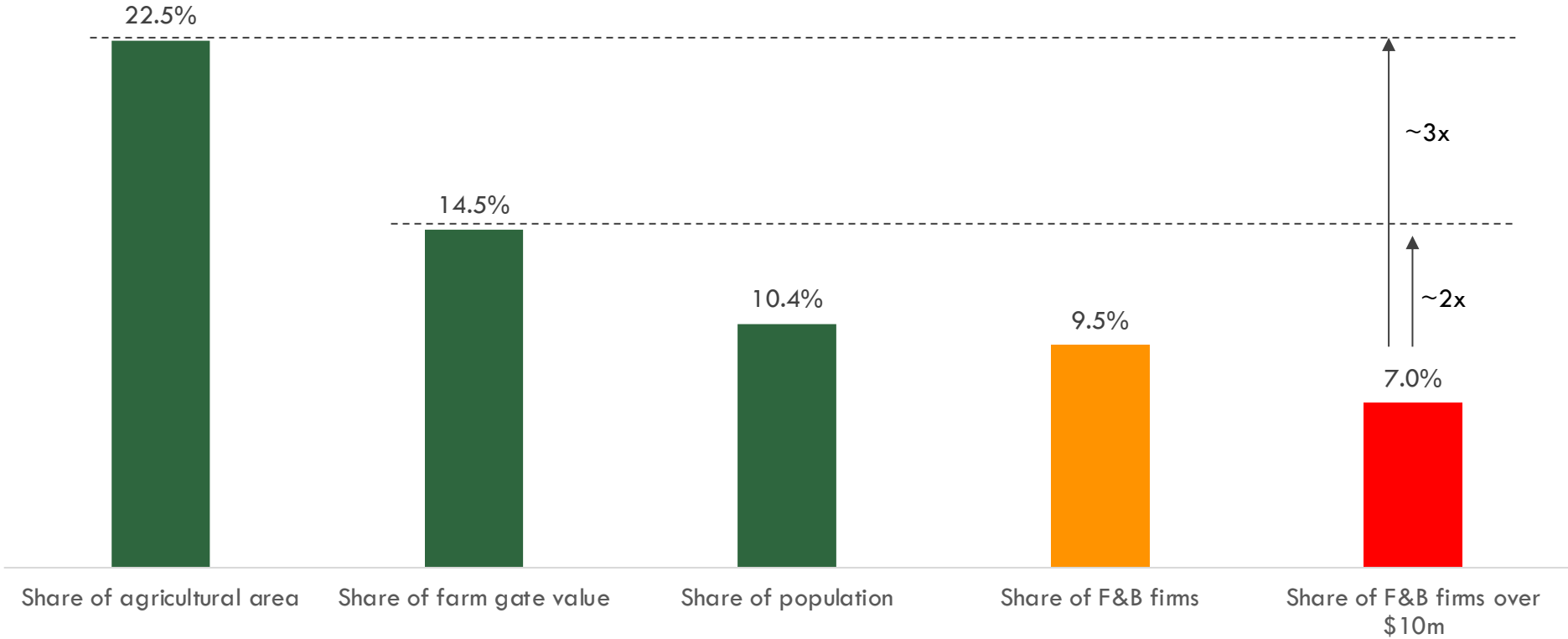
However, the industry is underperforming and faces a wide range of challenges

- Food and beverage manufacturing in Western Australia is underperforming relative to total Australia across multiple metrics
- Western Australian food and beverage manufacturing faces a number of specific challenges
- Most (96%) WA food and beverage manufacturing firms are small (under \$10m in revenue); only 53 firms exceed \$10m in revenue
- WA's agrifood sector is currently dominated by the production of raw commodities destined for export; only a small share of processors export
- Western Australia is a huge state with food and beverage businesses spread out across the whole region
- Beyond this, distribution and freight to neighbouring states and countries is challenging

Food and beverage manufacturing in Western Australia is underperforming relative to total Australia across multiple metrics

WESTERN AUSTRALIAN SHARE OF TOTAL AUSTRALIA FOR GIVEN VARIABLE

WA % of AU; 2020



Source: ABS (7121.0; 3101.0; 8165.0); Coriolis analysis

Western Australian food and beverage manufacturing faces a number of specific challenges

KEY CHALLENGES FACING THE WA F&B SECTOR

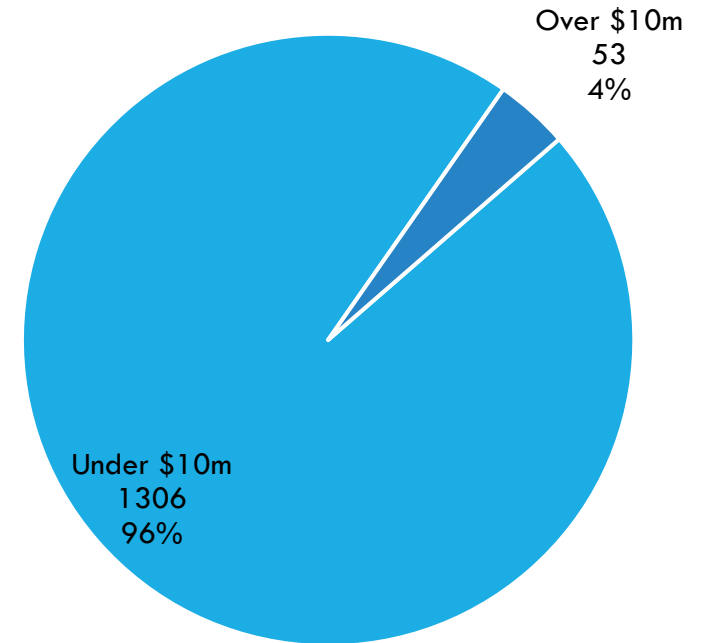
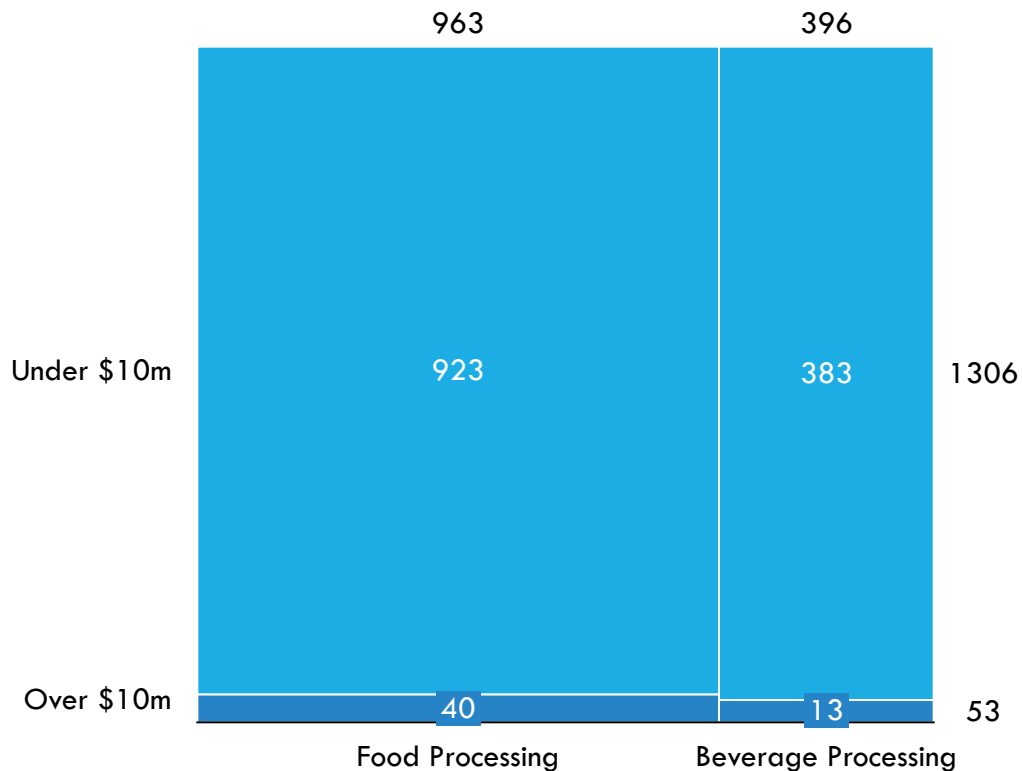


* Therefore with modern environmental, regulatory and labour standards leading to high costs relative to many developing countries; Photo credits: purchased or CC BY-SA 3.0 (Reise-Line)

Most (96%) WA food and beverage manufacturing firms are small (under \$10m in revenue); only 53 firms exceed \$10m in revenue

NUMBER OF F&B MANUFACTURING FIRMS IN WA BY REVENUE SIZE

Count; actual; as of YE June 2020

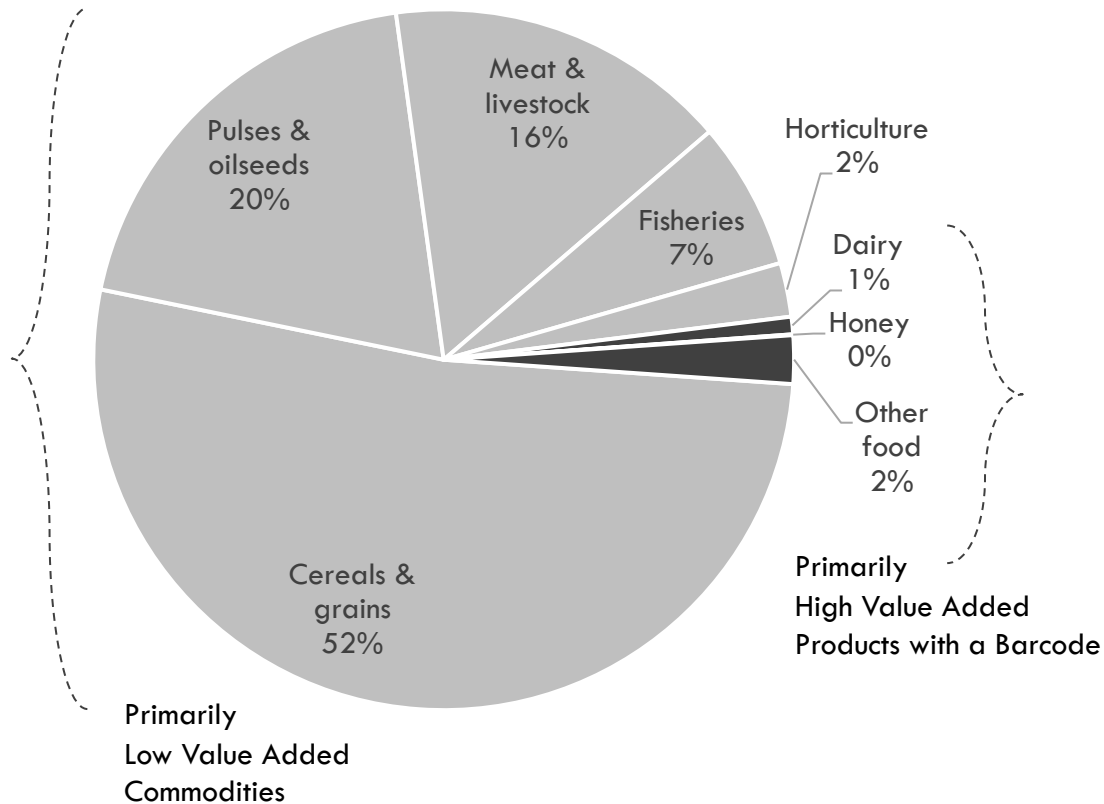


TOTAL = 1,359 F&B processing firms

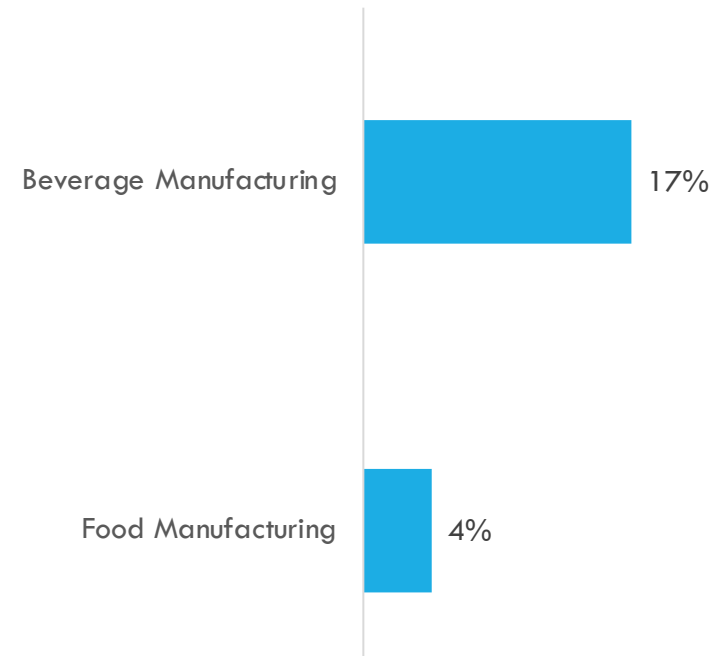
* ANZSIC classification is based on the nature of predominant (51%+) business activity; Source: ABS (8165.0); Coriolis analysis

WA's agrifood sector is currently dominated by the production of raw commodities destined for export; only a small share of processors export

WA AGRIFOOD EXPORTS BY TYPE
A\$m; 2016/17



SHARE OF WA FIRMS THAT EXPORT
% exporting; 2018/19



Based on past work, we suggest this is primarily firms over \$10m (see page prior) and wineries

Western Australia is a huge state with food and beverage businesses spread out across the whole state

EXAMPLE: DISTANCE BETWEEN NORTHERN AND SOUTHERN MOST DISTILLERY IN WA
Km; 2022

The Netherlands
Approximately to scale



Hoochery
DISTILLERY

300 Weaber Plain Rd,
Kununurra WA 6743, Australia
hoochery.com.au

Limeburners
western australian

252 Frenchman Bay Rd,
Robinson WA 6330, Australia
distillery.com.au

Beyond this, distribution and freight to neighbouring states and countries is challenging

“The most unique aspect of WA is that it is miles away from anyone. The interstate rail is unreliable, it closes 2-3 times per year. The road freight is too expensive.”

“We really saw how vulnerable we were when the floods closed the interstate rail system. We were isolated. This makes food security an issue.”

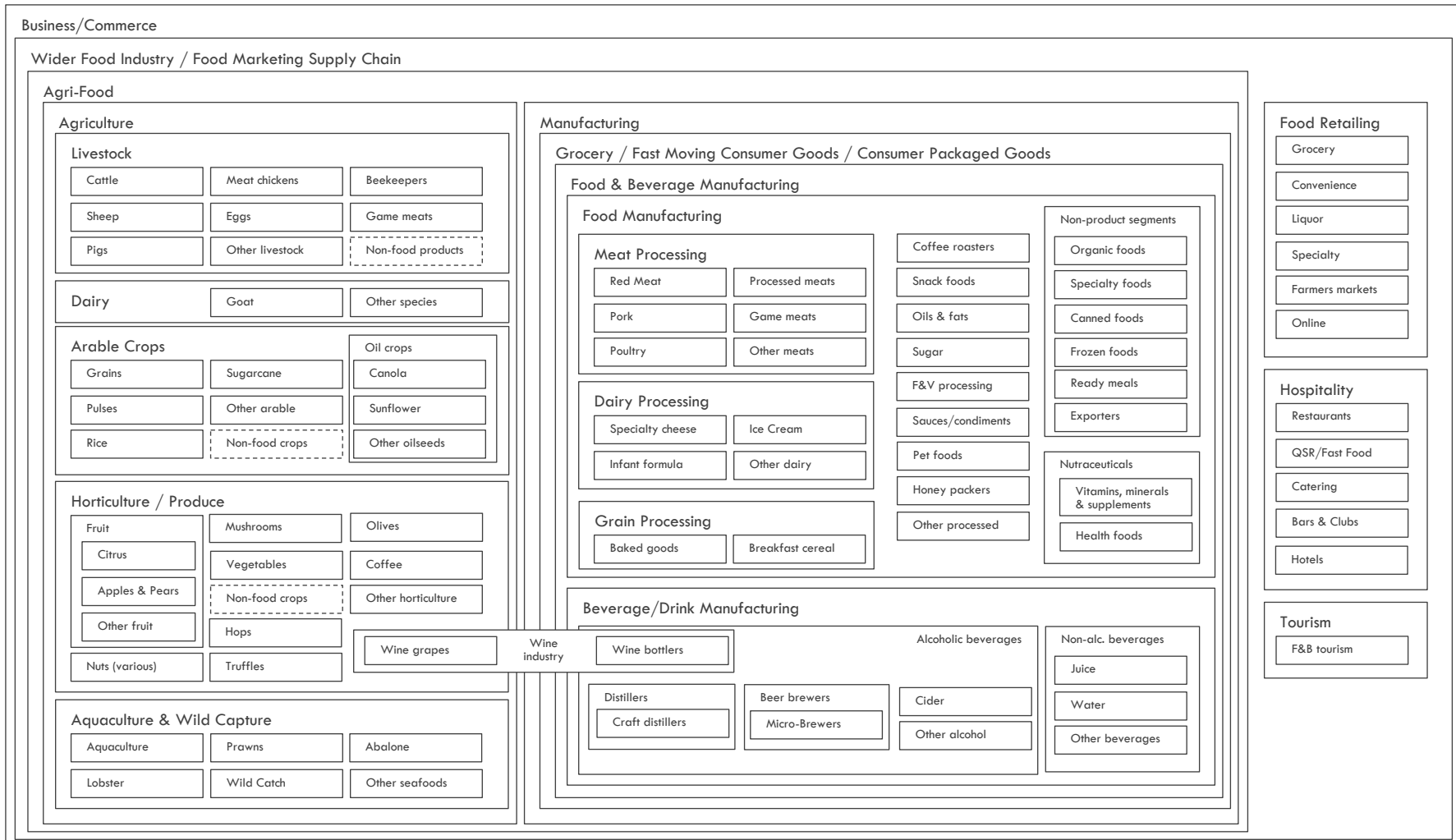
“It’s too risky freighting by rail in summer across to the East. We can’t afford delays with our product.”

“A real challenge for firms is the distance to other markets, whether that is internationally or the East Coast. Smaller firms find it all too hard.”

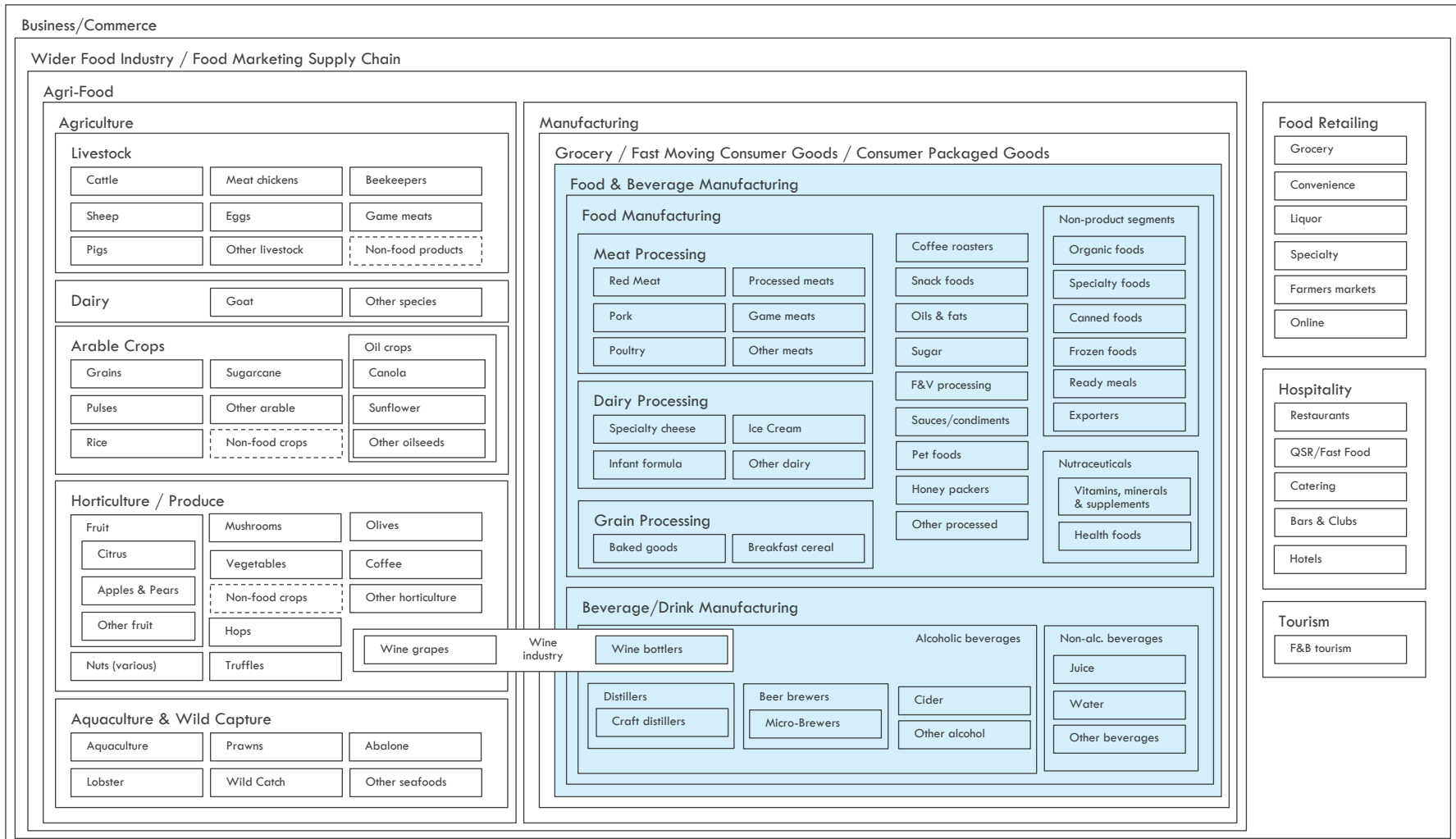
Western Australia has a lot of industry organisations, both at the state and the national level, supporting some part of the wider agrifood value chain

- The wider food industry supply chain is made up of a huge range of segments or sectors, all of which can have their own industry body
 - “Food and beverage manufacturing” is just one layer of a wider and more complex universe ranging from specific sectors to all business
- The industry stocktake (detailed in Appendix II) identified over 300 organisations that could provide industry organisation-like services to parts of the Western Australia agrifood value chain
 - Over 250 organisations provide direct coverage for some part of the Western Australian agrifood industry value chain
 - Many of the roles of an industry body can also be undertaken by other stakeholders and real overlap can and does occur
 - An additional 50+ organisations provide some form of direct support to the industry
- Firms are often members of multiple industry bodies and, in addition, have access to a wide range of other support organisations

The wider food industry supply chain is made up of a huge range of segments or sectors, all of which can have their own industry body

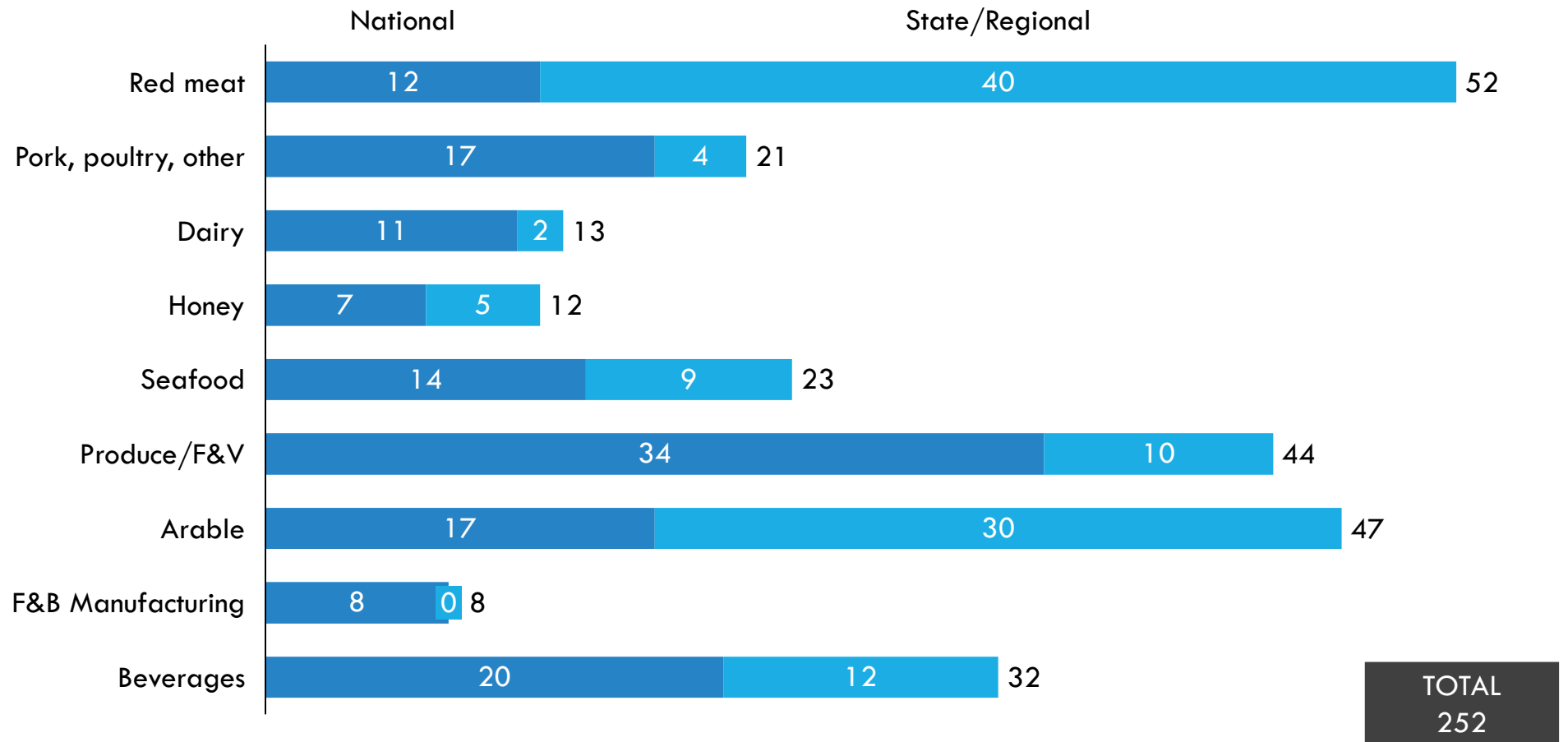


“Food and beverage manufacturing” is just one layer of a wider and more complex universe ranging from specific sectors to all business



Over 250 organisations provide direct coverage for some part of the Western Australian agrifood industry value chain

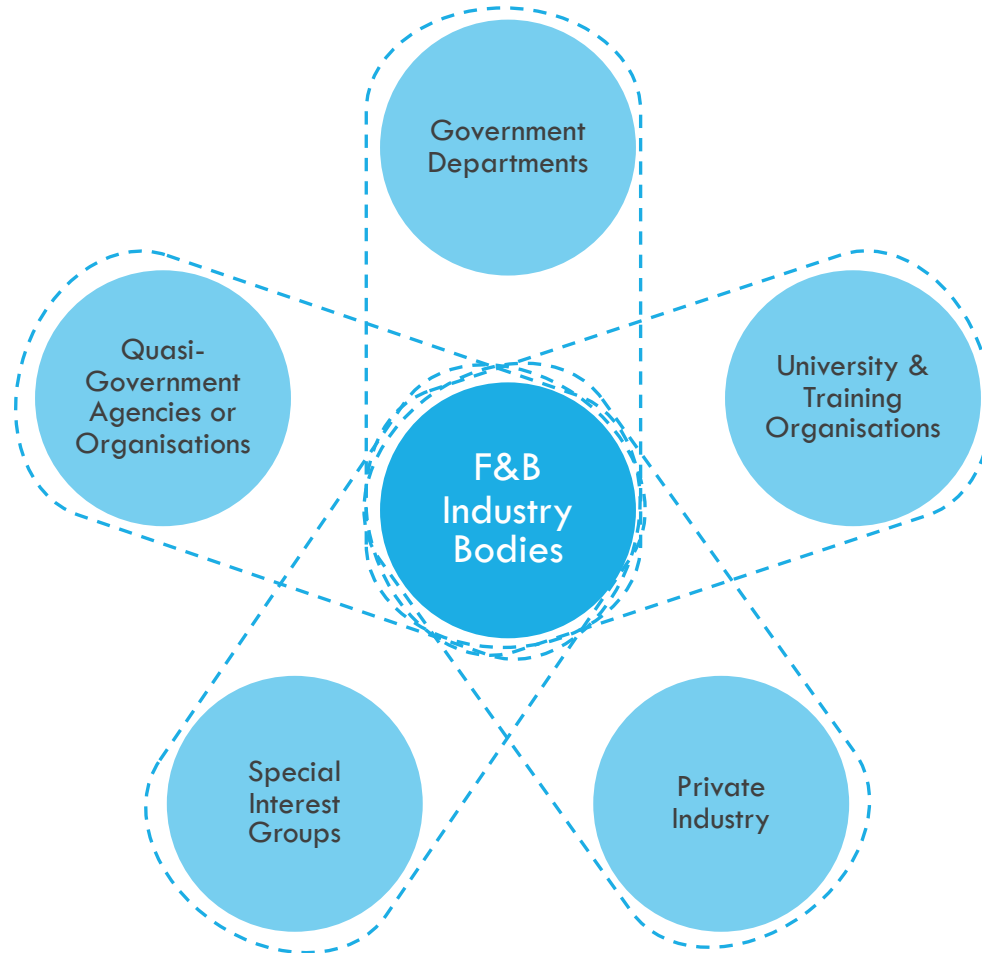
— HOW MANY INDUSTRY ORGANISATIONS COVER PARTS OF THE WIDER WA AGRIFOOD INDUSTRY? —



Source: Coriolis count of organisations profiled in Appendix I

Many of the roles of an industry body can also be undertaken by other stakeholders and real overlap can and does occur

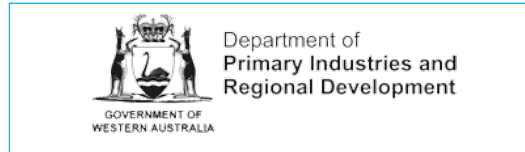
OVERLAPPING ROLES AND RESPONSIBILITIES



For example: any of these stakeholders could deliver a training program


Beyond industry level organisations, there are over 100 organisations supporting firms at the Federal, State and local level

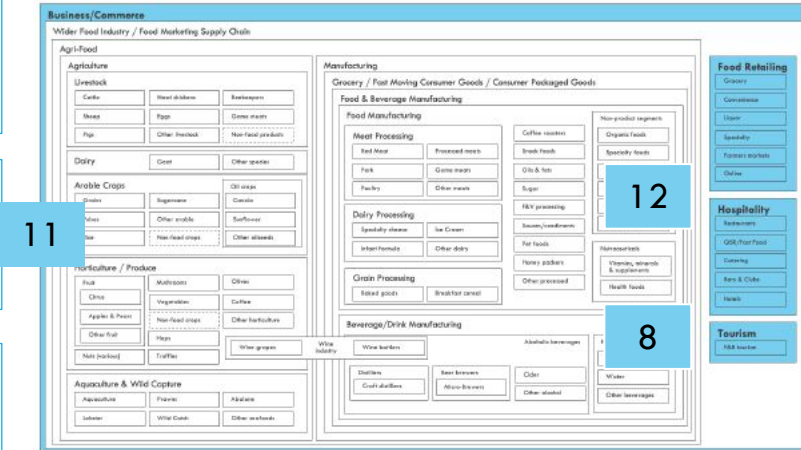
F&B SUPPORTING ORGANISATIONS



8  Cooperative Research Australia
 Australian Government
 Department of Industry, Science, Energy and Resources
 Industry Growth Centres

11 

11  AGRICULTURAL PRODUCE COMMISSION
 Supporting Producers' Initiative



REGIONAL DEVELOPMENT COMMISSIONS 9

 Regional Development Australia 9

SCIENCE AND RESEARCH ORGANISATIONS* 5-10

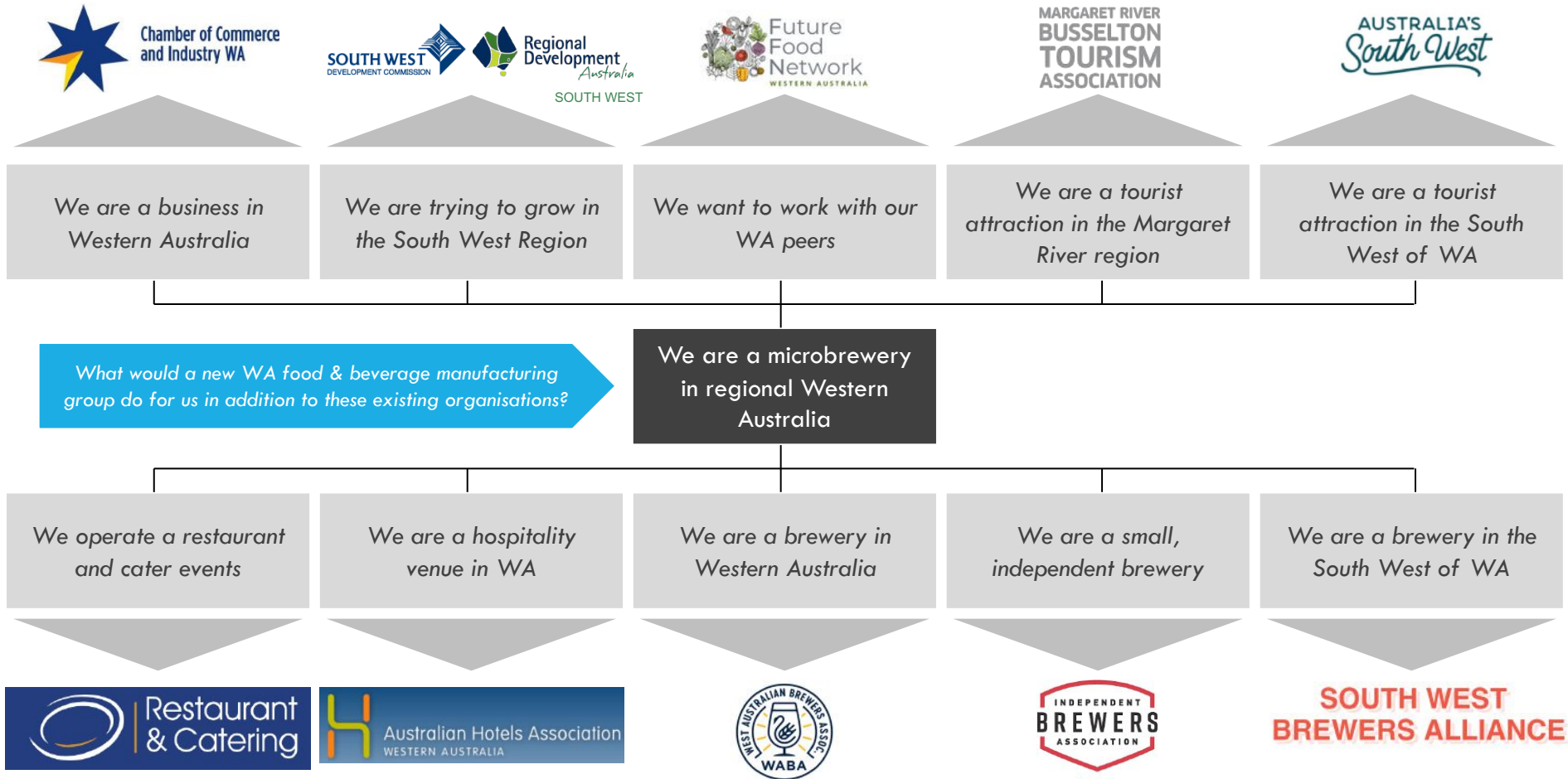
15 EDUCATION AND TRAINING FACILITIES

OTHER AGENCIES/ ORGANISATION

* Excluding Universities

Firms are often members of multiple industry bodies and, in addition, have access to a wide range of other support organisations

EXAMPLE OF FIRM WITH MULTIPLE POTENTIAL SUPPORT ORGANISATIONS
























There are a number of gaps in industry organisation coverage at state level; in particular, there is no total food and beverage manufacturing organisation

- There is not a problem at the national level
 - Australia has a robust set of national-level industry organisations covering post farmgate food and beverage manufacturing
- There are multiple gaps at the state level; small firms in particular appear to be underserved
 - Western Australia has a large number of potential gaps in state-level F&B manufacturing industry organisations
 - Most gap sectors without a WA industry organisation appear well served by existing national bodies
 - Smaller WA manufacturers appear to be underserved by large national industry organisations, as the WA dairy processing sector demonstrates
- Western Australia also lacks a state-level organisation providing coverage to the total F&B manufacturing sector
 - Most peer group regions have an industry body representing and supporting their total food and beverage manufacturing sector
 - Past attempts to create a Western Australian food and beverage industry body failed for a range of reasons









Australia has a robust set of national-level industry organisations covering post farmgate food and beverage manufacturing

INDUSTRY ORGANISATIONS IN THE F&B MANUFACTURING LANDSCAPE: TOTAL AUSTRALIA

 Rendering	 Pork Processing	 Egg Packing/Process.	 Aquaculture	 Speciality Cheese	 Non-Cow Dairy
 Pet Food Manufacturing	 Red Meat Processing	 Poultry Processing	 Seafood Processing	 Dairy Processing	 Infant Nutrition
 Stock Feed Mnfg.	 Foodservice Mnfg.	 F&B Manufacturing		 Honey Packing	 Manuka Honey
 Baking Industry	 Grain Processing	F&B Manufacturing		 Beer Brewing	 Spirits Distillers
 Oil & Fat Processing	 Malting	 Sugar Milling	 F&V Processing	 Alcoholic Beverages	Wine Australia Wine Production
 Nutraceuticals	 Health & Functional	 Juice Processing	 Non-Alcoholic Beverages	 Bottled Water	 Cider





Western Australia has a large number of potential gaps in state-level F&B manufacturing industry organisations

INDUSTRY ORGANISATIONS IN THE F&B MANUFACTURING LANDSCAPE: WESTERN AUSTRALIA

POTENTIAL GAP Rendering	 Pork Processing	 Egg Packing/Process.	 Aquaculture	POTENTIAL GAP Speciality Cheese	POTENTIAL GAP Non-Cow Dairy
POTENTIAL GAP Pet Food Manufacturing	POTENTIAL GAP Red Meat Processing	 Poultry Processing	 Seafood Processing	POTENTIAL GAP Dairy Processing	POTENTIAL GAP Infant Nutrition
POTENTIAL GAP Stock Feed Mnfg.	POTENTIAL GAP Foodservice Mnfg.	POTENTIAL GAP F&B Manufacturing		 Honey Packing	POTENTIAL GAP Manuka Honey
POTENTIAL GAP Baking Industry	 Grain Processing			 Beer Brewing	 Spirits Distillers
POTENTIAL GAP Oil & Fat Processing	POTENTIAL GAP Malting	POTENTIAL GAP Sugar Milling	 F&V Processing	POTENTIAL GAP Alcoholic Beverages	 Wine Production
POTENTIAL GAP Nutraceuticals	POTENTIAL GAP Health & Functional	POTENTIAL GAP Juice Processing	POTENTIAL GAP Non-Alcoholic Beverages	POTENTIAL GAP Bottled Water	POTENTIAL GAP Cider

Most gap sectors without a WA industry organisation appear well served by existing national bodies

WHAT ORGANISATIONS PROVIDE COVERAGE OF POST-FARMGATE F&B MANUFACTURING IN WA

	NATIONAL BODY W/COVERAGE	NOTES & COMMENTARY		NATIONAL BODY W/COVERAGE	NOTES & COMMENTARY
MEAT PROCESSING	 AMPC AUSTRALIAN MEAT PROCESSOR CORPORATION	<ul style="list-style-type: none"> - Limited number of WA red meat processors - No obvious state level need 	OIL & FAT PROCESSING	 AOF Australian Oilseeds Federation Inc.	<ul style="list-style-type: none"> - Small industry in WA (~2 firms) - Appears well served by AOF and others
RENDERERS	 AUSTRALIAN RENDERERS ASSOCIATION INC.	<ul style="list-style-type: none"> - Very limited number of WA renderers - No obvious state-level need 	FOOD & BEV. MNFG.	 AUSTRALIAN FOOD & GROCERY COUNCIL	<ul style="list-style-type: none"> - Only 1 WA based member firm (Mrs. Mac's); others branch offices - Smaller firms are fragmented
LIVESTOCK EXPORTERS	 AUSTRALIAN LIVESTOCK EXPORTERS COUNCIL	<ul style="list-style-type: none"> - Most exporters are national in scope - No clear state-level need 	FOOD & BEV. IMPORTERS	 FBIA	<ul style="list-style-type: none"> - Limited WA sector at any scale - Most major importers based on East Coast
DAIRY PROCESSING	 ADPF	<ul style="list-style-type: none"> - Only one large locally based processor (Brownes), and Lactalis - Appears well served by ADPF 	PET FOOD PROCESSORS	 PFIAA Pet Food Industry Association Australia	<ul style="list-style-type: none"> - Small WA sector currently - No obvious state level need
F&V PROCESSORS	 AUSTRALIAN FOOD & GROCERY COUNCIL	<ul style="list-style-type: none"> - Most large processors diversified* - Coverage provided at "F&B manufacturing" level 	STOCK FEED MNFG.	 SFMCA Stock Feed Manufacturers' Council of Australia	<ul style="list-style-type: none"> - Consolidated/concentrated WA stock feed processor sector - No obvious state level need
PROCESSED GRAIN PROD.	 AUSTRALIAN FOOD & GROCERY COUNCIL	<ul style="list-style-type: none"> - Most large processors diversified* - Coverage provided at "F&B manufacturing" level 	HEALTH & FUNCTIONAL	 AFDFA Australia Freeze Dry Health And Functional Food Association	<ul style="list-style-type: none"> - WA industry in infancy, though growing fast
BAKING INDUSTRY	 NBIA NATIONAL BAKING INDUSTRY ASSOCIATION	<ul style="list-style-type: none"> - Industry a mix of large national processors and smaller WA specialists 	NON-ALC. BEVERAGES	 Australian Beverages	<ul style="list-style-type: none"> - Large processors all East Coast based - Small WA processors fragmented

* For example Goodman Fielder












Smaller WA manufacturers appear to be underserved by large national industry organisations, as the WA dairy processing sector demonstrates

EXAMPLE: WHAT ORGANISATIONS COVER WHAT FIRMS IN WA DAIRY PROCESSING

	MEMBER OF AFGC & ADPF	MEMBER OF ADPF ONLY	NOT A MEMBER OF AFGC NOT A MEMBER OF ADPF
Multi-state dairy processors w/WA processing	  	-	-
Large WA based dairy processors	-	 	-
Medium size WA dairy processors	-	-	    
Small local/regional WA dairy processors	-	-	                            

Western Australia also lacks a state-level organisation providing coverage to the total F&B manufacturing sector

INDUSTRY ORGANISATIONS IN THE F&B MANUFACTURING LANDSCAPE: WESTERN AUSTRALIA

POTENTIAL GAP Rendering	 Pork Processing	 Egg Packing/Process.	 Aquaculture	POTENTIAL GAP Speciality Cheese	POTENTIAL GAP Non-Cow Dairy
POTENTIAL GAP Pet Food Manufacturing	POTENTIAL GAP Red Meat Processing	 Poultry Processing	 Seafood Processing	POTENTIAL GAP Dairy Processing	POTENTIAL GAP Infant Nutrition
POTENTIAL GAP Stock Feed Mnfg.	POTENTIAL GAP Foodservice Mnfg.	POTENTIAL GAP F&B Manufacturing		 Honey Packing	POTENTIAL GAP Manuka Honey
POTENTIAL GAP Baking Industry	 Grain Processing			 Beer Brewing	 Spirits Distillers
POTENTIAL GAP Oil & Fat Processing	POTENTIAL GAP Malting	POTENTIAL GAP Sugar Milling	 F&V Processing	POTENTIAL GAP Alcoholic Beverages	 Wine Production
POTENTIAL GAP Nutraceuticals	POTENTIAL GAP Health & Functional	POTENTIAL GAP Juice Processing	POTENTIAL GAP Non-Alcoholic Beverages	POTENTIAL GAP Bottled Water	POTENTIAL GAP Cider

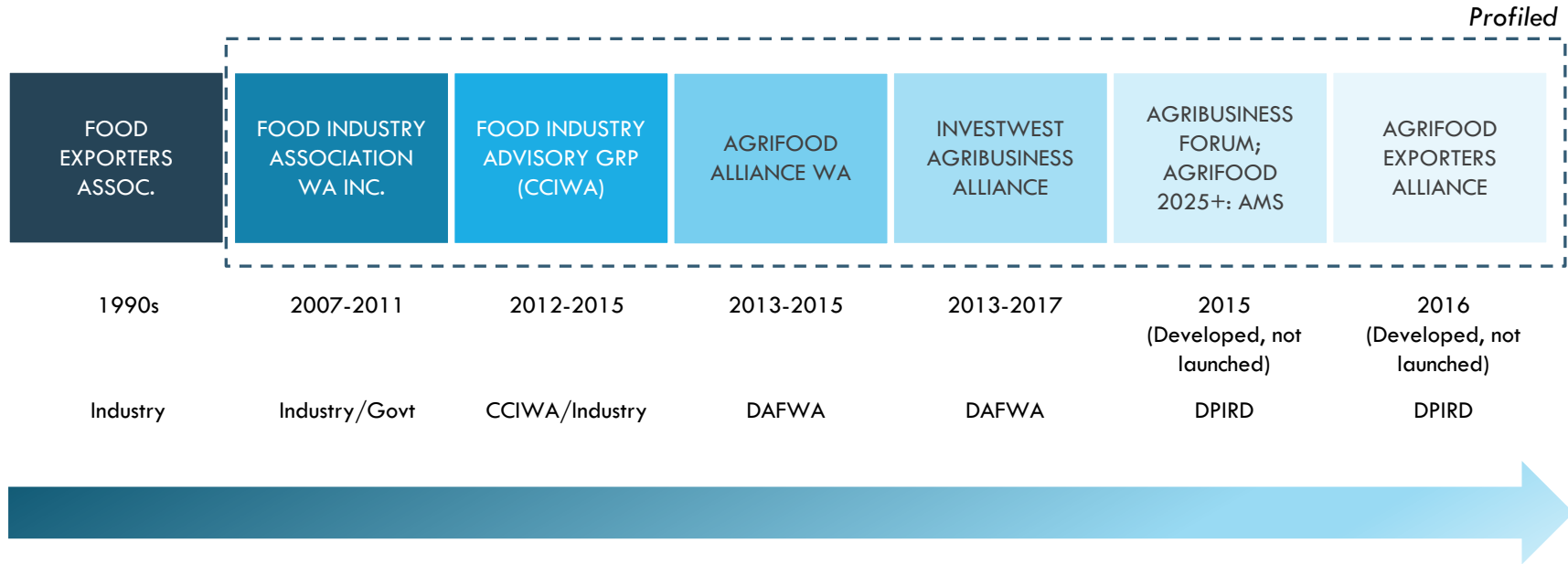
Most peer group regions have an industry body representing and supporting their total food and beverage manufacturing sector

IDENTIFIED PEER GROUP REGIONS FOR WESTERN AUSTRALIA

 <p>Food and Beverage Canada</p> <p>Canada</p>	 <p>FOOD & BEVERAGE</p> <p>British Columbia</p>	 <p>ALERTA food processors association</p> <p>Alberta</p>	<p>FAILED</p> <p>Saskatchewan</p>	 <p>FOOD & BEVERAGE manitoba</p> <p>Manitoba</p>	 <p>FOOD AND BEVERAGE ONTARIO</p> <p>Ontario</p>	 <p>CTAQ</p> <p>Quebec</p>
 <p>ALIMENTS ET BOISSONS ATLANTIQUE</p> <p>Atlantic Canada</p>	 <p>fdf food & drink federation passionate about food & drink</p> <p>United Kingdom</p>	 <p>FINE FOOD</p> <p>great taste 2022</p> <p>United Kingdom</p>	 <p>Taste West</p> <p>South West England</p>	 <p>Food Drink Devon</p> <p>Devon</p>	 <p>Dorset Food & Drink</p> <p>Dorset</p>	 <p>TEXAS FOOD PROCESSORS ASSOCIATION</p> <p>Texas</p>
 <p>fdf food & drink federation passionate about food & drink Cymru</p> <p>Wales</p>	 <p>Bwyd a Diod Cymru Food & Drink Wales</p> <p>Wales</p>	 <p>fdf food & drink federation passionate about food & drink Scotland</p> <p>Scotland</p>	 <p>SCOTLAND FOOD & DRINK</p> <p>Scotland</p>	 <p>FD Food Drink Ireland Ibec</p> <p>Ireland</p>	 <p>BORD BIA IRLISH FOOD BOARD</p> <p>Ireland</p>	 <p>Danish Agriculture & Food Council</p> <p>Denmark</p>
 <p>California Food Producers</p> <p>California</p>	 <p>FOOD NORTHWEST We Feed You</p> <p>Pacific Northwest</p>	 <p>MWFPA Midwest Food Processors Association, Inc.</p> <p>Midwest</p>	 <p>Sipa</p> <p>Southeast</p>	 <p>NJFPA NEW JERSEY FOOD PROCESSORS ASSOCIATION</p> <p>New Jersey</p>	 <p>Associated New York State Food Processors</p> <p>New York</p>	 <p>AFMA ARIZONA FOOD MARKETING ALLIANCE</p> <p>Arizona</p>
 <p>AUSTRALIAN FOOD & GROCERY COUNCIL</p> <p>Australia</p>	<p>FAILED</p> <p>NSW</p>	<p>FAILED</p> <p>Victoria</p>	 <p>NORTHLink</p> <p>MELBOURNE'S NORTH FOOD GROUP Food Beverage Fibre</p> <p>Melbourne</p>	 <p>FIAQ Food Industries Association of Queensland Inc.</p> <p>Queensland</p>	 <p>FOOD SOUTH AUSTRALIA ... feeding connections</p> <p>South Australia</p>	<p>FAILED</p> <p>Western Australia</p>

Western Australia has had many attempts at a F&B Industry body

WA INDUSTRY ORGANISATIONS DATES AND LEAD



Past attempts to create a Western Australian food and beverage industry body failed for a range of reasons

HISTORICAL WA F&B INDUSTRY ORGANISATIONS

NAME	DATE	MEMBERSHIP	PURPOSE	WHY DID IT FAIL?
FOOD EXPORTERS ASSOC.	1990s	Food Exporters	- Historical association with historical limited details	- Not enough support
FOOD INDUSTRY ASSOCIATION WA INC. (FIA)	2007-2011	F&B manufacturers Small to SME	- Input into <u>policy</u> and develop <u>strategies</u> for industry issues - Promote and facilitate <u>value adding</u> to WA primary products - Facilitate and encourage <u>market development</u> – domestic and export	- Lack of funding - No robust funding model
FOOD INDUSTRY ADVISORY GROUP (FIAG)	2012-2015	AgriFood firms	- Forum and <u>reference group</u> - Raise food industry issues and develop <u>policy</u> responses - Many predecessors	- Lack of funding - Lack of support (political) - Didn't serve a large industry
AGRIFOOD ALLIANCE WA	2013-2015	WA Peak Industry Groups	- Enable groups to <u>coordinate</u> and steer effort at a whole-of-sector level	- Budget issues - Low industry ownership - Didn't serve a coherent group
INVESTWEST AGRIBUSINESS ALLIANCE	2013-2017	Companies, Industry Orgs, Government and Educ institutions	- Foster relationships to <u>co-ordinate investment</u>	- Agribusiness Expansion unit closure (restructuring of Govt department) - Not supported by industry
AGRIBUSINESS FORUM; AGRIFOOD 2025+: ASIAN MARKET SUCCESS	2015	Agrifood leaders (proposed)	- Inspired by Te Hono (sales <u>collaboration</u> by major NZ firms and <u>educational</u> offshore boot camps); ongoing	- Concept developed not launched - Dominated by service providers
AGRIFOOD EXPORTERS ALLIANCE	2016	Exporters	- TBD	- Concept developed not launched

PROFILED IN APPENDIX III

DOCUMENT STRUCTURE / AGENDA

KEY QUESTION

DETAILS/SUB-QUESTIONS

What problem are we trying to solve?

- What is the WA context for this project? (e.g. diverse, geographically spread out, majority small and medium size enterprises)
- Is there a 'gap in the market' in WA identified through this stocktake?

Do we need an industry organisation focused on WA food and beverage manufacturing?

- Why have past organisations failed? What are the critical factors of success?
- Is there sufficient appetite from industry in WA to drive and fund a [potentially new*] representative group with sufficient shared interests?

What are our options for an industry organisation focused on WA food and beverage manufacturing?

- How can WA action these findings to establish (or reframe) a WA food and beverage manufacturing industry group, including funding requirements, governance/structure, and critical factors of success?
- What are the details of proven, successful global models adapted to fit with the WA context of diverse, geographically spread out, majority small and medium size enterprise? What is a clear framework for WA to follow based on these models? How can new models either fill the gap in the market (or assist existing organisations) to better support the WA food and beverage manufacturing sector?
- What are the short, medium, and long-term funding structures of the identified models?
- Is there a role for government? If so, what level of support would be required and for what term to establish a sustainable business model?

APPENDIX I – GLOBAL MODELS
What does best practice look like?

- What proven, successful global models of industry groups - that fit with the WA context of diverse, geographically spread out, majority small and medium size enterprises - exist?

APPENDIX II – WA STOCKTAKE
What do we have currently?

- What agrifood industry groups (including quasi-government agencies, formal and informal arrangements) are currently operating in WA? Who and where do they represent? What is their funding model? What services do they provide? What is their role or function?

APPENDIX III: PAST WA GROUPS
What have we had before?

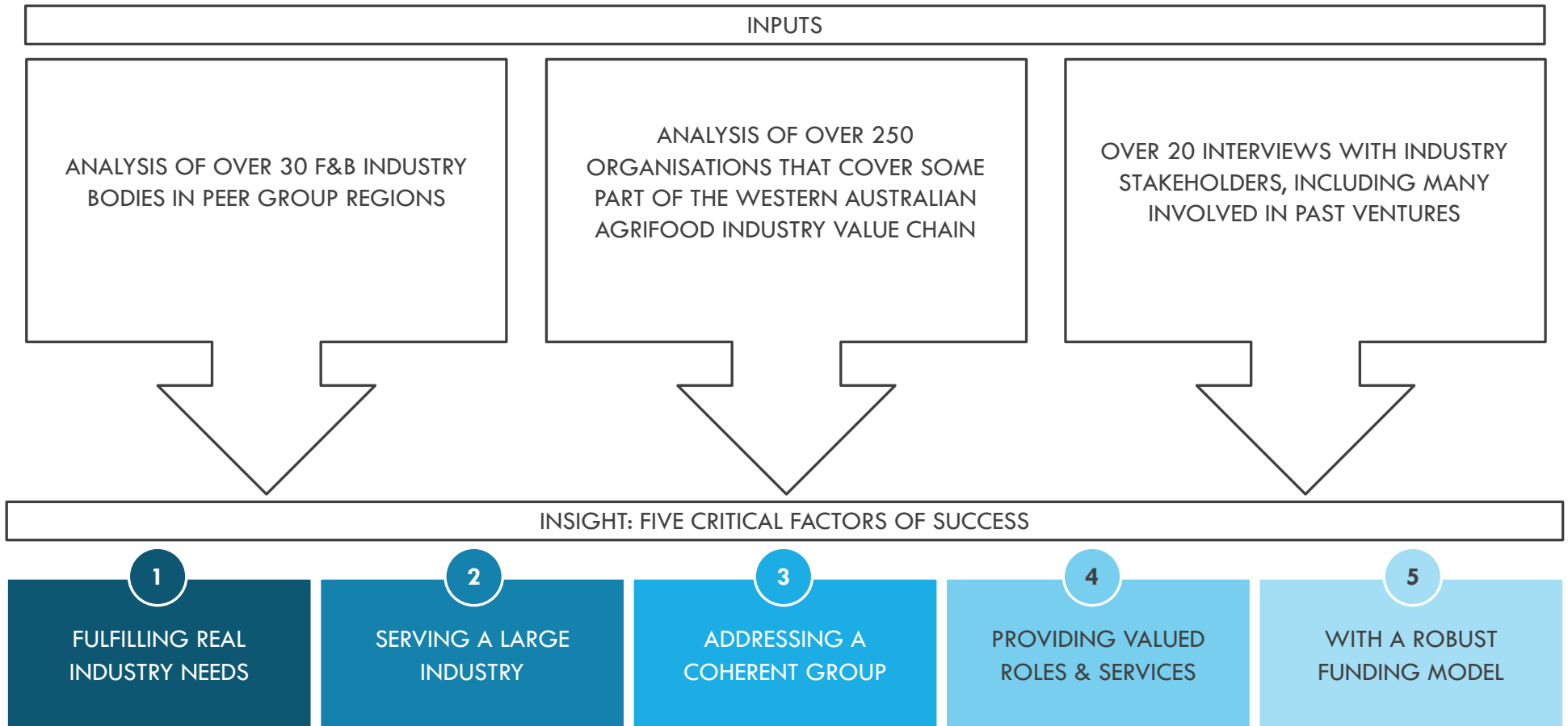
- What agrifood industry groups (including quasi-government agencies, formal and informal arrangements) are currently operating or have operated in WA?

A successful organisation serving Western Australian F&B manufacturers will need to deliver on all five identified critical factors of success

- An analysis of global peers [Appendix I], local leaders [Appendix II] and interviews with stakeholders led to the identification of five critical factors of success for any new WA F&B industry organisation
- Successful industry organisations that “stand the test of time” deliver on all five identified drivers of success; the drivers reinforce each other
 1. A successful organisation will fulfil a real industry need in a stable niche in the business ecology
 2. A successful organisation will serve a large industry giving it the critical mass to survive and thrive
 3. A successful organisation will address a coherent group with members that feel part of that group
 4. A successful organisation will provide valued roles and services meaning members are happy to renew their memberships
 5. A successful organisation will have a robust funding model capable of paying its own way long run
- Under each of these drivers, clear signs of a successful industry organisation emerged from the research on both WA and global peers

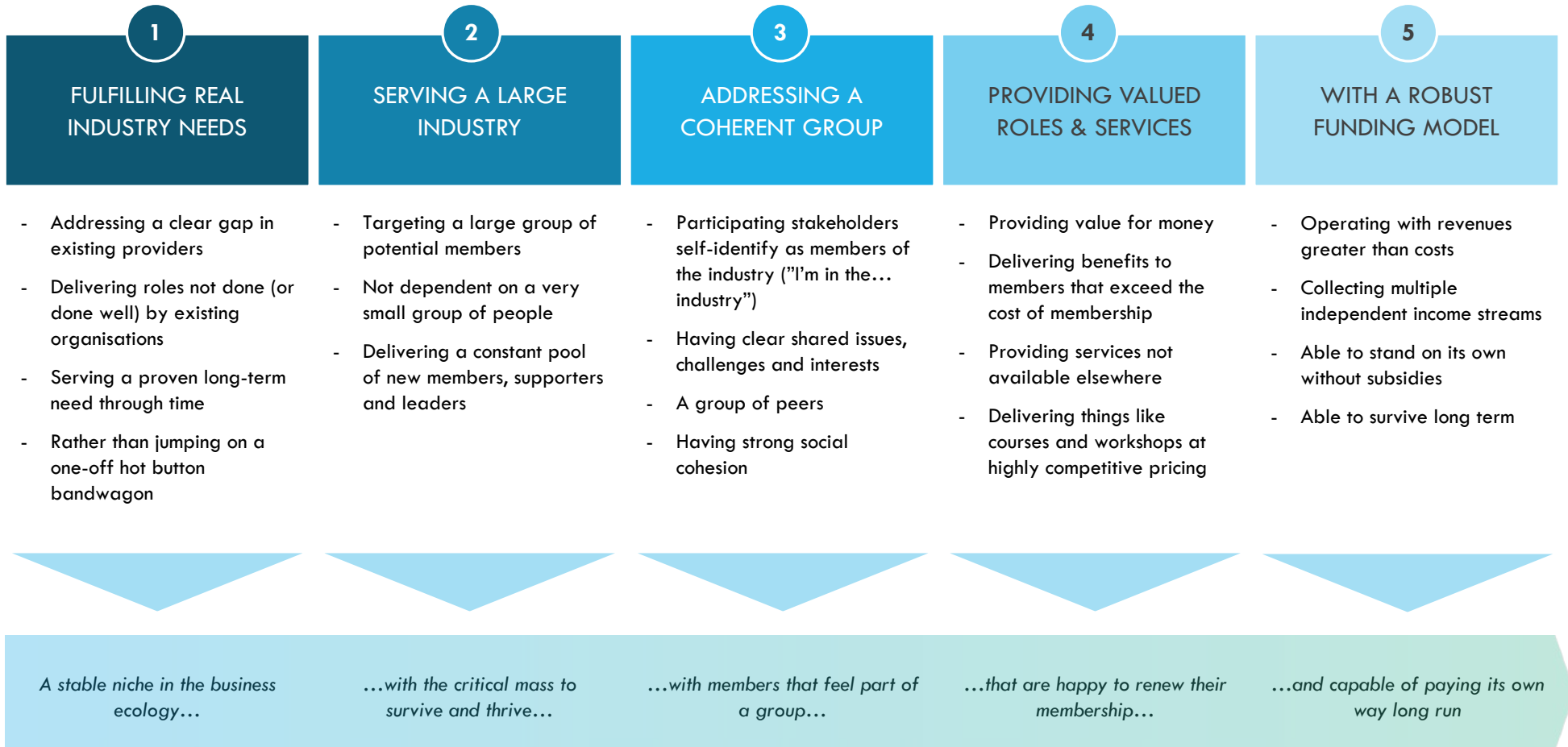
An analysis of global peers, local leaders and interviews with stakeholders led to the identification of five critical factors of success

HOW WERE THE CRITICAL FACTORS OF SUCCESS IDENTIFIED?



Successful industry organisations that ‘stand the test of time’ deliver on all five identified drivers of success; the drivers reinforce each other

WHAT ARE THE DRIVERS OF LONG TERM SUCCESS FOR AN INDUSTRY ORGANISATION?



1. A successful organisation will fulfil a real industry need in a stable niche in the business ecology

“Lobbying must be very **strategic, evidence based and proactive**, not reactive. A group would identify what is our direction, what challenges are in the way, what legislation is an issue. Then how do we change to be more successful.”

“You have to know who you are serving, why and how. All members must have a clear need and benefit from being a member.”

“Small bodies work because they target a small region with lots of issues in common. Like the Midwest has water, transport and port issues in common. This is a well managed local group.”

“Having a **clear line to government** is great, one voice from our sector.”

“It’s important to have a clear vision and mission. When you know that everything else falls in behind.”

“From a marketing perspective you would need to find something that appealed broadly to all F&B manufacturers. Something that they all think their customers value.”

2. A successful organisation will serve a large industry giving it the critical mass to survive and thrive

“Lots of small firms is fine, but they can’t afford to pay, so you need lots of them. Most large firms feel they can go it alone, so you have to appeal to them as well. You need lots of firms and associates to get scale.”

“WA doesn’t really have any multinational corporations producing in WA. The types of facilities they have need to support a population of 100m. These large firms have a very different focus. If you have these firms in the state who are then willing to pay high fees and get value for money – an organisation would work!

“GIWA is effective because it focuses across the grain industry and works on growing and marketing. Big and small all work together. This is a really big industry.”

“You need lots of medium and large firms to be able to survive. Small firms just won’t pay.”

“There really aren’t enough firms with a willingness to pay. The industry isn’t big enough. A body would need government support.”

“You need the big firms because they are willing to pay more, they can afford more. The problem is big firms are already in the ears of the Ministers at the State and National level. Many big firms are already in enough other organisations. How is the WA group different?”

3. A successful organisation will address a coherent group with members that feel part of that group

“To succeed firms in the group need a **common interest**. When the new **Water Act** was coming out around 2018, the industry got together to lobby government. That was a common interest across most food and beverage groups. **Labour force** is a common issue both supply, training and making the industry appealing.”

“The most important role for the industry body is **lobbying and advocacy**, all working together with a **common cause** like consolidated freight and logistics.”

“A group that comes together voluntarily is more likely to work with others. We will encourage working together, not fighting within the industry. We need people who aren't fighting for government funds and will work together.”

“Recently the government's **COVID** response was a common issue. The Foodservice Group and Horticulture Group were both good groups to test the government response and to respond to challenges. This was effective, but I'm not sure it has enough issues to stay together with regular meetings”

“A group does well with issues like **labour**. Lobbying for more international labour programs. Also things like packaging - biodegradable packing. This is driven by the supermarket but effects all of F&B firms.”

“Not sure how you would get the Midwest, to work with the Ord and the Gascoyne. Where would they focus? On what issues?”

“The group needs to develop a consensus for the good of the whole industry.”

4. A successful organisation will provide valued roles and services meaning members are happy to renew their memberships

“It’s very important to know what gap you are filling, why you exist and what value you are giving members. You need a clear mandate and mission.”

“Real value is looking at big issues at the government level. So issues like GM Soy. Not all members may agree but the industry can still have a position.”

“The most important role is to be the voice of the industry. That picks up big issues and can be the channel of communication on big issues. You then need the big firms (Harvest Road, CMG, Westpork, CBH) to be involved so it’s representative.”

“The Rendering Association is very effective, it has an international perspective. Technology and best practice is shared because there is no competition. You visit plants, and have informative conferences. We get a lot of value from this organisation.”

“An organisation really needs to provide value.”

“An organisation with good networking is valued. The Agribusiness Australia group have periodic breakfasts where you can network. They are good.”

“An independent organisation can set the mandate of industry, not be at the whim of the government mandate. The topics and agenda must all be led by industry.”

5. A successful organisation will have a robust funding model capable of paying its own way long run

“There is no way you can be reliant on government funding, you need to have a wide range of funds.”

“The key points of a successful organisation is the organisation and in particular the Executives must have real drive and passion and a decent budget.”

“Could the government use the food industries payroll tax to fund activities. That would fully fund the industry for ten years.” [How would the other sectors respond to this?]

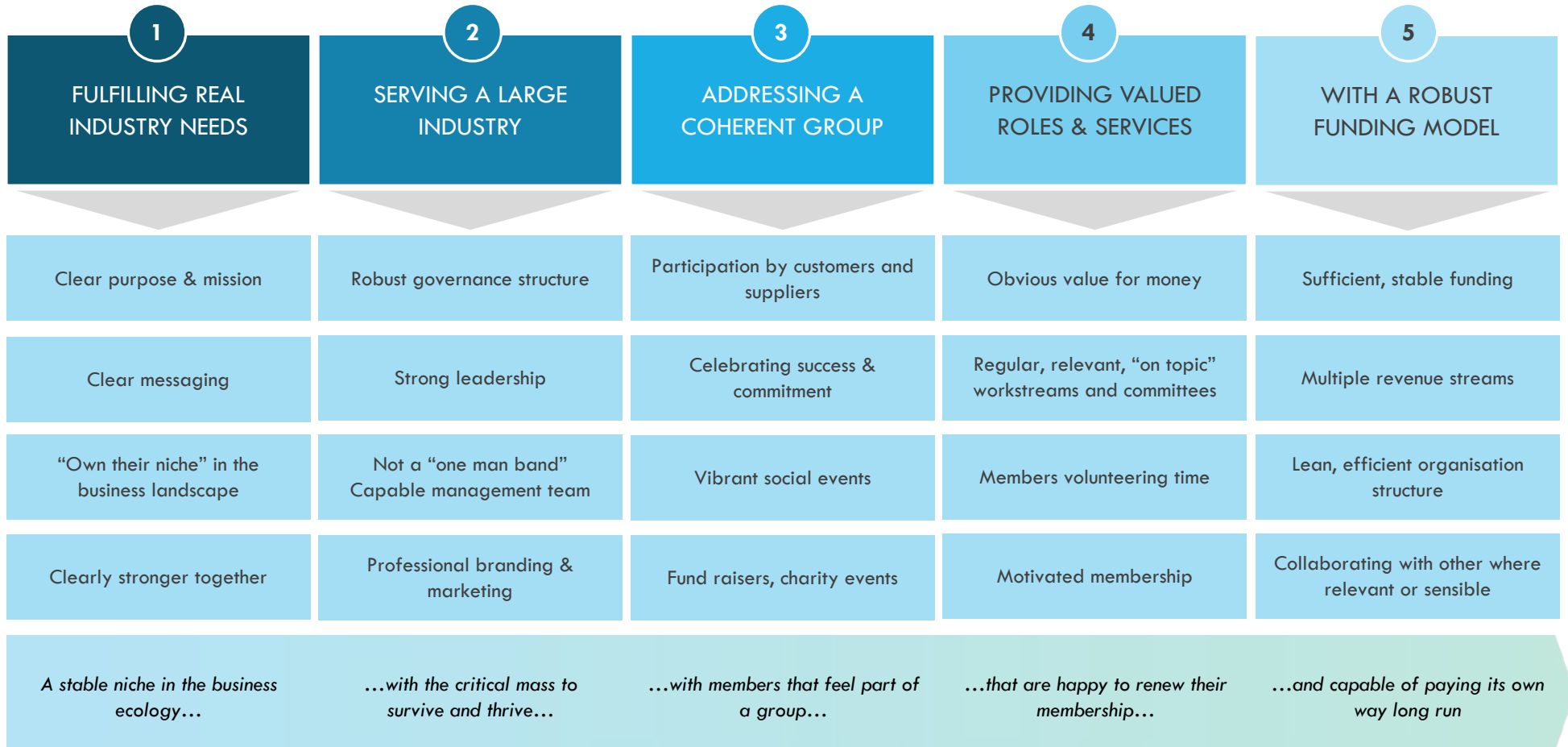
“Small firms need help initially, so their fees are lower, then when they get bigger they can contribute more and use additional functions and services which are fee for service. So organisations often have to have less funding initially or get support from government.”

“An industry body needs earned income and not just funds from grants and universities. They will need help to get established but can work towards being sustainable and self-funding. This might take 7 years.”

“Groups are really inefficient if they need to keep applying for funding and grants. This uses so much time and resource. The more funding streams you have the more complex the model. It’s important to keep all masters happy.”

Under each of these drivers, clear signs of a successful industry organisation emerged from the research on both WA and global peers

WHAT ARE THE SIGNS OF A SUCCESSFUL INDUSTRY ORGANISATION?



“The most important factors of success of any organisation is to have a **clear purpose and mission, strong capable leadership** and you must **add real value** to your membership.”

DOCUMENT STRUCTURE / AGENDA

KEY QUESTION

DETAILS/SUB-QUESTIONS

What problem are we trying to solve?

- What is the WA context for this project? (e.g. diverse, geographically spread out, majority small and medium size enterprises)
- Is there a 'gap in the market' in WA identified through this stocktake?

Do we need an industry organisation focused on WA food and beverage manufacturing?

- Why have past organisations failed? What are the critical factors of success?
- Is there sufficient appetite from industry in WA to drive and fund a [potentially new*] representative group with sufficient shared interests?

What are our options for an industry organisation focused on WA food and beverage manufacturing?

- How can WA action these findings to establish (or reframe) a WA food and beverage manufacturing industry group, including funding requirements, governance/structure, and critical factors of success?
- What are the details of proven, successful global models adapted to fit with the WA context of diverse, geographically spread out, majority small and medium size enterprise? What is a clear framework for WA to follow based on these models? How can new models either fill the gap in the market (or assist existing organisations) to better support the WA food and beverage manufacturing sector?
- What are the short, medium, and long-term funding structures of the identified models?
- Is there a role for government? If so, what level of support would be required and for what term to establish a sustainable business model?

APPENDIX I – GLOBAL MODELS
What does best practice look like?

- What proven, successful global models of industry groups - that fit with the WA context of diverse, geographically spread out, majority small and medium size enterprises - exist?

APPENDIX II – WA STOCKTAKE
What do we have currently?

- What agrifood industry groups (including quasi-government agencies, formal and informal arrangements) are currently operating in WA? Who and where do they represent? What is their funding model? What services do they provide? What is their role or function?

APPENDIX III: PAST WA GROUPS
What have we had before?

- What agrifood industry groups (including quasi-government agencies, formal and informal arrangements) are currently operating or have operated in WA?

Five models emerged from the research and each is developed for Western Australia

- The roles food and beverage industry organisations typically take on and self-fund can be grouped around four broad themes
 - Peer group experience shows that three of these themes can form the core role of an industry organisation; all organisations support networking (the fourth theme)
 - That organisations structured around each of these three themes were found again and again globally indicates these are robust models serving real needs
- Two additional types of industry organisations – peak bodies and quasi-government agencies – typically only emerged when government played a role
- Each of these five types of industry organisation is adapted as a theoretical model for the Western Australia food and beverage manufacturing industry

The roles food and beverage industry organisations typically take on and self-fund can be grouped around four broad themes

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED*

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTING	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

* However, government funds can – and often are - also be provided for some of these roles (typically for a limited timeframe); Source: Coriolis

Peer group experience shows that three of these themes can form the core role of an industry organisation; all organisations support networking

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

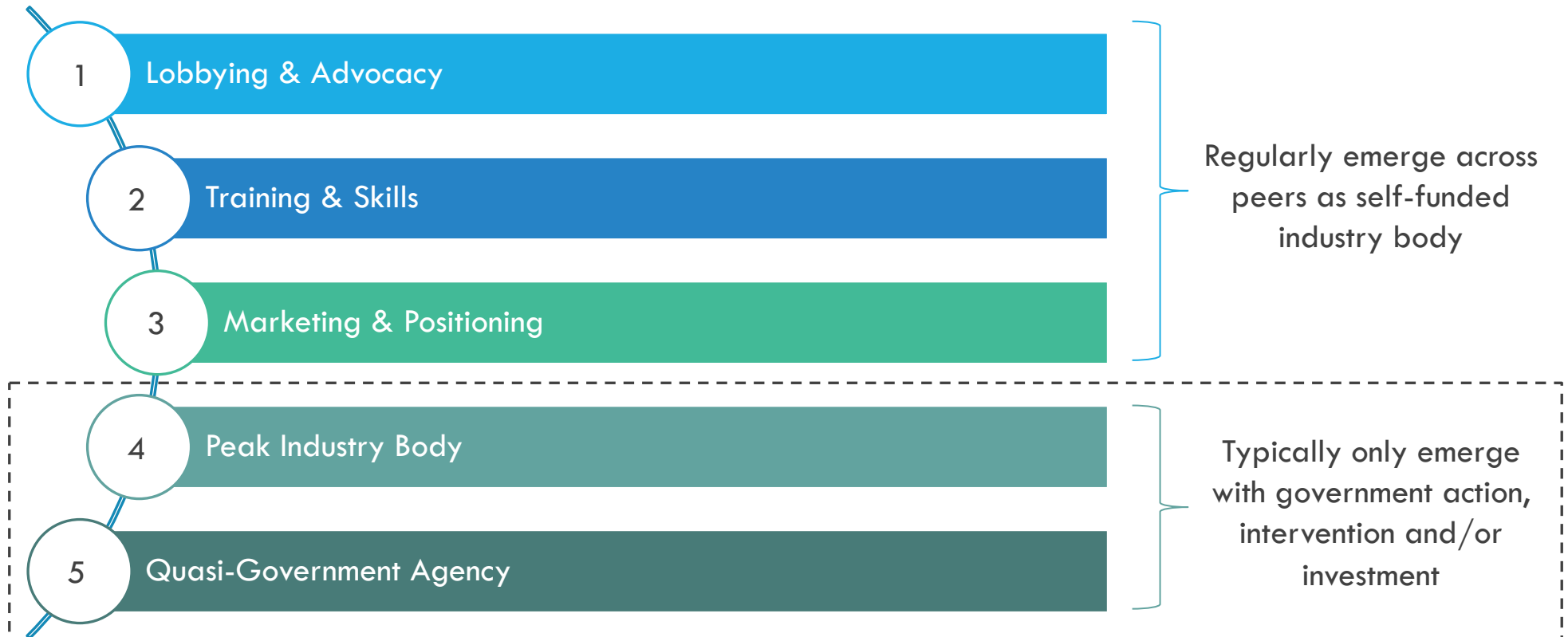
SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	1. LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	2. TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	3. MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTING	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

That organisations structured around each of these three themes were found again and again globally indicates these are robust models serving real needs

CORE ROLES FOR A SELF FUNDING F&B MANUFACTURING ORGANISATION

	1 LOBBYING & ADVOCACY FOCUS	2 TRAINING & SKILLS FOCUS	3 MARKETING & POSITIONING FOCUS
Why do firms join the organisation?	<ul style="list-style-type: none"> - To have their voice heard - To influence government 	<ul style="list-style-type: none"> - To develop their staff - To gain management insights 	<ul style="list-style-type: none"> - To help sell their products to consumers - To support staff attraction
SOCIALISING: NETWORKING & PROMOTING THE INDUSTRY			
Where does the funding come from?	<ul style="list-style-type: none"> - Membership fees - Events 	<ul style="list-style-type: none"> - Membership fees - Course fees - Consultancy fees - Events - Sponsorships 	<ul style="list-style-type: none"> - Membership fees - Contest entry fees - Events - Stickers/promo material - Sponsorships
Example global model	CLFP California	Food & Beverage Manitoba	Taste of the West, UK
	Significant overlap between these two models Organisations in larger regions often do both		Generally done by a separate organisation with little overlap with other roles

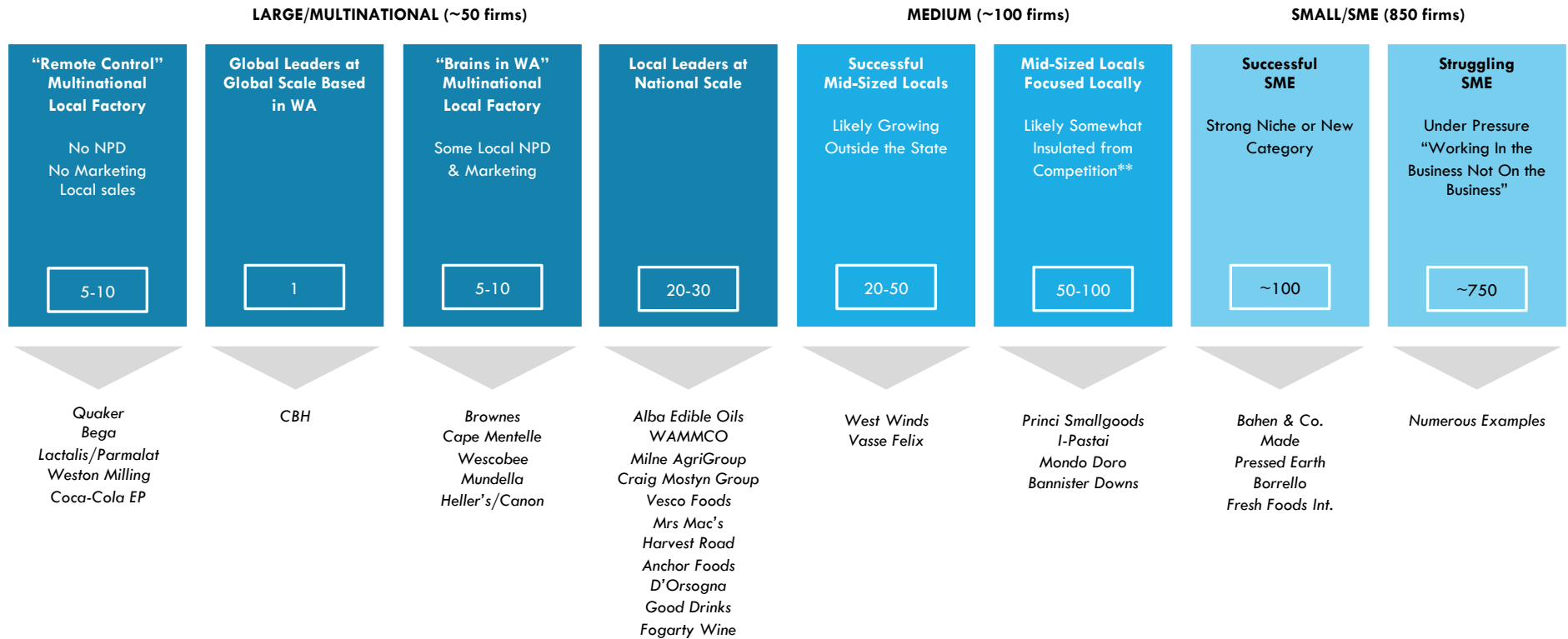
Two additional types of industry organisations – peak bodies and quasi-government agencies – typically only emerged when government played a role



Based on available data and previous work, a simplified segmentation of Western Australian F&B manufacturing firms* is proposed

SEGMENTATION OF WA F&B MANUFACTURERS BY SIZE

TOTAL ~1,000



SELECT EXAMPLES

"The Big End of Town"

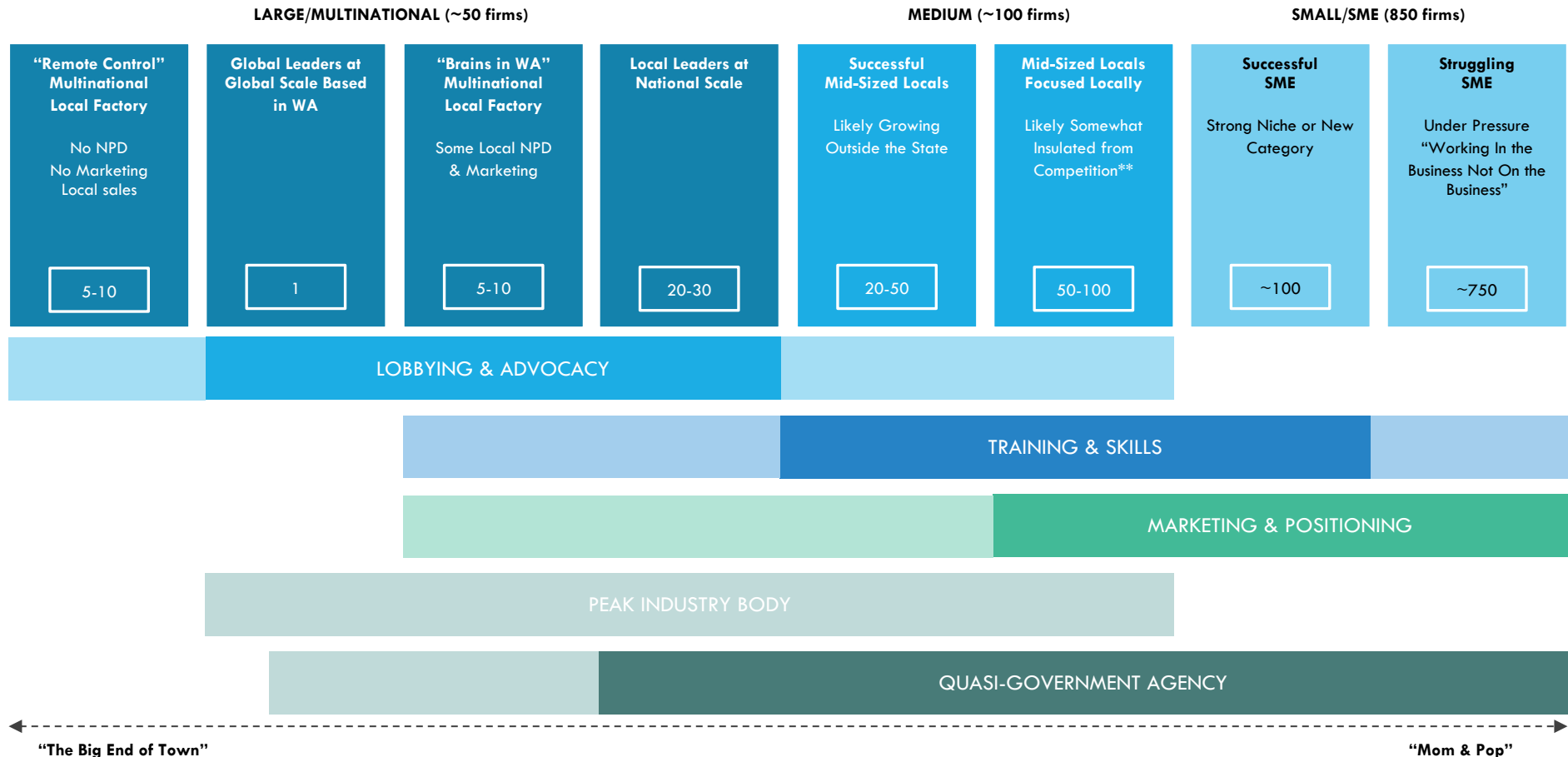
"Mom & Pop"

* Excluding store-based bakeries; ** For a huge range of potential reasons (e.g. highly perishable product); see Coriolis report "Pathway to Competitiveness" completed for DPIRD

The appeal of the five identified industry organisations varies based on target firm size/segment

SEGMENTATION OF WA F&B MANUFACTURERS BY SIZE

TOTAL ~1,000

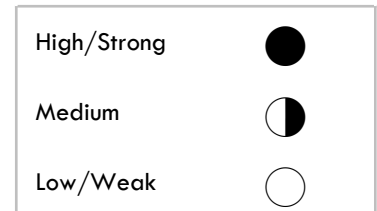


* Excluding store-based bakeries; ** For a huge range of potential reasons (e.g. highly perishable product); see Coriolis report "Pathway to Competitiveness" completed for DPIRD

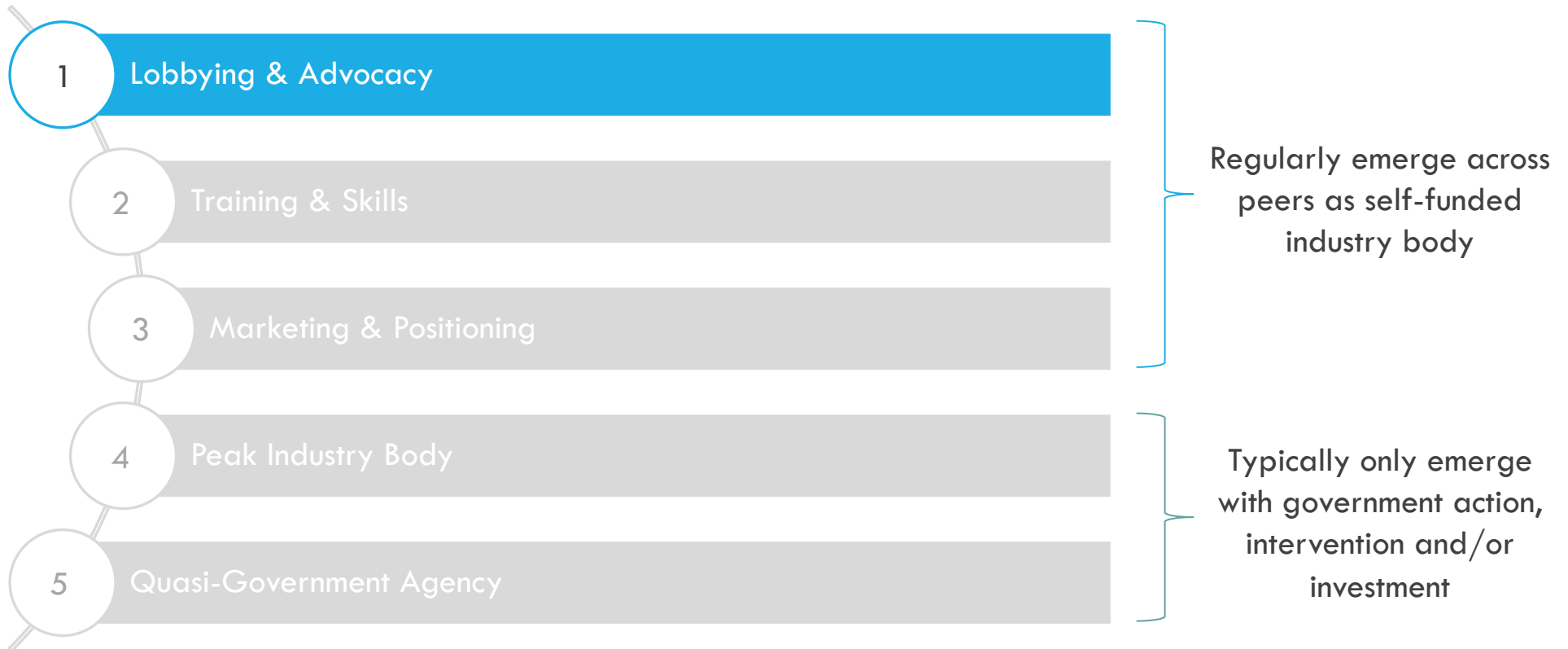
The five options varied in their potential to deliver outcomes under Western Australian conditions; no clear winner emerged from the research

RANKING THE FIVE POTENTIAL MODELS

MODEL	OVERALL	Support sustainable growth by large firms	Support sustainable growth by SME	Increase industry confidence	Support a more united industry with more cohesion	Able to self-fund under WA conditions	Support from interviewees
1. Lobbying & Advocacy	●	●	○	●	●	○	●
2. Training & Skills	○	○	●	●	○	●	○
3. Marketing & Positioning	●	○	●	●	●	●	○
4. Peak Industry Body	●	●	●	○	●	○	●
5. Quasi-Government Agency	●	●	●	○	○	○	●



First, a model ‘Lobbying and Advocacy’ focused industry organisation for Western Australian food and beverage manufacturers is developed



FOOD PROCESSORS FEDERATION OF WA (FPFWA)

WHAT IS THE CONCEPT?

FPFWA is a statewide organisation representing food and beverage processors focused specifically on protecting the interests of the food processing industry before all branches of state government. FPFWA is also at the forefront in addressing the many regulatory issues facing the industry in a state with a complex and challenging regulatory environment.

GIVE ME THE ELEVATOR PITCH

FPFWA is your advocate in Perth, monitoring and analyzing key legislation and regulations and effectively representing your interests. We are your “eyes and ears” in Government and your go-to resource for a wide range of issues. To be most effective in the public policy arena, the food processing industry must work together. We need your voice and participation in FPFWA.

WHAT MIGHT THE OPERATING & FUNDING STRUCTURE LOOK LIKE?

HOW MANY STAFF WOULD BE EMPLOYED?	1-2	
HOW MANY BOARD MEMBERS?	18-20	
HOW MANY MEMBERS WOULD THE ORGANISATION LIKELY HAVE?	100-200	
WHAT TYPES OF MEMBERSHIPS WOULD EXIST?	Producer Processor	Supplier Affiliate
WHAT WOULD BE THE AVERAGE FEES PER MEMBER?	\$1,100	
WHAT OTHER REVENUE STREAMS WOULD EXIST?	Conference Sponsorships	

WHAT RESOURCES & PUBLICATIONS WOULD BE PRODUCED?

- FPFWA Newsletter
- FPFWA Legislative Bill Tracker
- FPFWA Membership Directory
- Members Only Industry Forums

WHAT ACTIVITIES & SERVICES WOULD BE DELIVERED?

- Advocacy and lobbying
- Submissions to government
- Industry advice, particularly around compliance
- State Government Day (meeting with government)
- Canberra Fly-In (meeting with government)
- Industry leader roundtable events
- FPFWA Annual Conference
- Specialist Committees
- Annual Golf Tournament

WHAT ARE THE BEST PRACTICE GLOBAL MODELS?



How could it happen? How could it come together?

STRAWMAN FOR DISCUSSION

VISION: Western Australian food producers and processors come together in FPFWA to present a united front to state and national government that makes the case for sustainable industry growth going forward

1

Leaders from key WA agrifood sectors – including arable crops, meat, dairy, horticulture, processed foods and beverages – get together and acknowledge a common set of issues exist. They agree to work together on these issues.

2

The Food Processors Federation of Western Australia (FPFWA) is formed.

Founding members commit time and resources to the organisation.

A capable and politically astute CEO is appointed.

Multiple working groups are launched around key topics (e.g. water).

3

Multiple FPFWA workstreams create clear consensus on direction and a detailed “path forward”.

Working together, industry and government create results in previously intractable areas (e.g. red tape reduction).

FPFWA becomes the acknowledged “voice of WA agrifood”.

What is the concept?

“The Ontario food and beverage processing industry is represented by FBO in a number of ways including Board positions with the Agricultural Management Institute, Agricultural Adaptation Council, President’s Council, Minister Leal’s Agri-Food Growth Steering Committee, Agricultural Research Institute of Ontario, Farm Products Marketing Commission, Open For Business and the Canadian Council of Food Processors.

FBO regularly meets with government and political officials to review items that have the potential to support or hinder industry’s competitiveness such as the proposed Ontario Retirement Pension Plan.

FBO is also a primary voice to governments on programs such as Growing Forward 2 for Processors and the Jobs and Prosperity Fund, in addition to collaborating with subject matter expert organisations such as Provision Coalition on industry sustainability issues.”
FBO Annual Review 2014-15



“CLFP is the only statewide food processing organisation in California focused specifically on protecting the interests of the food processing industry before all branches of state government. CLFP is also at the forefront in addressing the many regulatory issues facing the industry in a state with the most complex and challenging state regulatory environment in the U.S. CLFP is structured and staffed to help you effectively comply with requirements and plan for the future.

CLFP maintains a daily presence in the halls of state government. When the Legislature is in session, our staff is actively analyzing proposed bills, providing detailed testimony, and meeting with lawmakers to explain the ramifications of their actions on the state’s food processing industry. The focus is on ensuring that your concerns are heard in the Capitol.”
CFP website



“The FDF is a powerful unified voice for the industry and we act on our members’ behalf on the business-critical issues of the day. We communicate our industry’s values and concerns to Government, regulators, consumers and the media. We also provide our members with a range of expertise and guidance including: food safety and science concerns, trade and regulatory policy, nutrition and health, sustainability including plastics and energy.” FDF UK website





Where would the organisation deliver? Where would it focus?

STRAWMAN FOR DISCUSSION

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
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	Primary role
	Secondary activity

How would it deliver? Global peer group organisations have worked with government to address key industry issues such as labour and skills shortages

EXAMPLE: FOOD & BEVERAGE ONTARIO LAUNCHES CAREERSNOW!

NEW INVESTMENT CONNECTING PEOPLE TO JOBS IN ONTARIO'S FOOD AND BEVERAGE PROCESSING SECTOR

FOOD AND BEVERAGE ONTARIO LAUNCHES CAREERSNOW!

Toronto, May 11, 2021 – Today, Food and Beverage Ontario announces the launch of CareersNOW!, a province-wide program designed to rapidly respond to immediate job vacancies in the food and beverage processing sector and attract talent for the future.

From small to medium-sized family businesses through to large corporations, solving the labour gap has been a top priority for the industry. Ontario's more than 4,000 food processing operations represent the province's largest manufacturing sector employer but growing the workforce continues to be a challenge.

"Many businesses in Ontario are like Hans Dairy, focused on making great food for Canadians but with limited time or expertise to connect with job seekers. CareersNOW! is making certain that people developing their careers have every opportunity to match their skill sets and ambitions with employers in our sector," said Sarab Hans, CEO, Hans Dairy.

Labour market analysis by Food Processing Skills Canada has shown that the industry across Canada will have an employment gap of up to 54,000 people by 2025. Poor industry perceptions, language barriers, limited outreach to underrepresented demographics and a skills mismatch have all been factors in recruiting people.

CareersNOW! will optimize Food and Beverage Ontario's initiatives **Taste Your Future** to profile careers, and expand **Frontline Food Facts** to provide essential skills training and new opportunities for employment. Delivering targeted employer resources will round out the program. CareersNOW! was developed with project partners – Food, Health & Consumer Products of Canada, FoodGrads, Food Processing Skills Canada, Magnet, Ontario Chamber of Commerce, Meat & Poultry Ontario, University of Guelph and Excellence in Manufacturing Consortium.

"Workers in the food and beverage sector are heroes that have been working tirelessly to keep shelves stocked for hard-working families. This new program will encourage more people to join these rewarding careers, making them and their communities more stronger than ever," said Monte McNaughton,

Minister of Labour, Training and Skills Development.

"People have recognized that food and beverage processing is an essential and resilient sector. Food and Beverage Ontario is leveraging this heightened level of awareness by supporting businesses with employment resources that can be activated quickly through technology solutions proven in other sectors," said Chris Conway, Food and Beverage Ontario

Food and Beverage Ontario is the provincial professional leadership organisation of choice in Ontario for members of the food and beverage processing community – a community that contributes over \$42 billion annually and is the number one manufacturing employer in Ontario.

This Employment Ontario project is funded in part by the Government of Canada and the Government of Ontario.

Media inquiries

Isabel Dopta
Communications Director, Food and Beverage Ontario
idopta@foodandbeverageontario.ca | 519.993.1192



<https://foodandbeverageontario.ca/careersnow/>



<https://tasteyourfuture.ca>



<https://frontlinefoodfacts.ca>

Can the state support a F&B manufacturing Lobbying/Advocacy organisation? What you would need to believe

WILL THIS MODEL WORK IN WA: WHAT YOU WOULD NEED TO BELIEVE

An organisation could be developed that would...

Elements of the WA context that support this

Potential challenges in the WA context...

1) Fulfil a real industry need	<ul style="list-style-type: none"> - Government actions (and inaction) have costs to F&B manufacturers - Currently no advocacy/lobbying “voice of the industry” for WA F&B manufacturing; sector “punches under its weight” - Numerous interviewees articulated that conceptually there was a need for an organisation playing this role in WA - “Dutch Disease”^{**} means WA costs are high and firms need to keep working to maintain and improve productivity and efficiency 	<ul style="list-style-type: none"> - Private provision crowded out in many areas by DPIRD and many other government agencies at all levels of government (and private) - Most business critical F&B manufacturing issues relate to national retailers or national rules/regulations - WA-level issues better addressed at wider level (e.g. CCIWA)? - May not be enough common issues; may not agree (e.g. primary processors wanting higher prices and value added users lower)
2) Serve a large industry	<ul style="list-style-type: none"> - WA is a major producer of a wide range of food ingredients suitable for transformation into consumer products - WA has around 1,000 F&B manufacturing firms - F&B manufacturing a long term growth platform for the state 	<ul style="list-style-type: none"> - Only ~50 of these firms are \$10m+ - Many large F&B manufacturing firms have limited team in WA, limiting their available resource for industry good - Model appears to require significant member volunteered time
3) Address a coherent industry	<ul style="list-style-type: none"> - WA has a active and growing F&B manufacturing industry - Peer group regions with strong parallels such as California (e.g. drought, guest workers, complex regulations) have successful organisations pursuing this role for over 100 years - California model (CLFP) suggests casting a net wider than just F&B manufacturing to include large producers (particularly produce) - WA agrifood industry – particularly post-farmgate – is maturing and professionalising; shifting from entrepreneurs with strong opinions to professional managers able to work well with others 	<ul style="list-style-type: none"> - Historically too many big personalities and too small a sector to work together - Large firms are fragmented and diverse, not clustered - Most large firms processing a single, primary ingredient (e.g. pork, milk, beef, grapes); very few secondary processing at scale - Many firms see themselves as sector firms (e.g. wine not F&B) - Clear tension between casting a wide net (to get scale/revenue) and having a coherent agenda (e.g. distilling vs. fishing)
4) Provide valued roles and services	<ul style="list-style-type: none"> - Individual F&B manufacturers can find locating, addressing, responding to and handling other chain stakeholders challenging on their own; working together on shared issues 	<ul style="list-style-type: none"> - Significant potential for duplication of roles with existing providers - A “big ask” for a new market entrant to be competitive with existing solution providers - Mismatch between limited budget and extensive possible scope
5) Develop a robust funding model	<ul style="list-style-type: none"> - No lack of money; the richest country on earth if it was a country^{**} - Investment is flowing into the WA F&B manufacturing sector 	<ul style="list-style-type: none"> - Even with aggressive participation rates, the pool of large members is small, limiting total membership-based budget - Small firms unlikely to value services enough

* https://en.wikipedia.org/wiki/Dutch_disease; ** per capita

WA F&B manufacturing could potentially support a lobbying/advocacy organisation if it was lean and well run; large firm support a key to success

SIMPLIFIED 'TOY MODEL' – WA F&B MNFG. INDUSTRY ORGANISATION

					STRAWMAN TREAT AS CONCEPTUAL/DIRECTIONAL	
REVENUE						
SEGMENT	# OF POTENTIAL MEMBERS	ESTIMATED % THAT WOULD JOIN	IMPLIED MEMBERS	AVERAGE FEES/MEMBER	ANNUAL REVENUE	
F&B Manufacturer Large/Multinational	50	80%	40	\$5,000	\$200,000	
F&B Manufacturer Medium	100	40%	50	\$500	\$25,000	
F&B Manufacturer Small/SME	850	5-7%	~50	\$100	\$5,000	
SUB-TOTAL	~1,000	14%	140	~\$1,100	\$230,000	
Advertising & Sponsorships					\$25,000-75,000	
Conference & Other Events					\$25,000-75,000	
TOTAL					\$330,000	

COMMENTS/CONCLUSIONS

- This is a simple 'toy model' to quickly test the viability of this concept in Western Australia
- Obviously any group looking to move forward should do this properly
- Global peer group models are in larger areas with more large firms (e.g. California)
- The lobbying/advocacy model primarily serves large and medium firms
- Large firms pay the vast bulk of membership fees
- WA does not have sufficient large firms with sufficient appetite and so cannot achieve high revenue
- Any attempt to form this type of organisation in WA would need to run a "very tight ship"
- **It is difficult to see how this lean a cost structure could support a wide workload; there is a real challenge here of overpromising and underdelivering**
- For this model to work, member firms would need to volunteer significant team time to committees and working groups; larger firms have more team depth to spare and share

EXPENSES

	ANNUAL
Staff (1 + 1 potentially part time)	\$230,000
Office/Other	\$25,000
Conference	\$75,000
TOTAL	\$330,000

Local organisations and firms felt Lobbying and Advocacy was an important feature of an industry body

“Lobbying and advocacy is important. A body has much more strength than an individual. Having only one organisation voice is also important. The more united you are, the more power you have.”

“Lobbying is the most important aim. The industry must have the ability to be a voice that picks up issues relevant to the whole industry. It can be a channel of communicating on big issues. If big companies use the voice of an industry body it's not so personal. It has to have big firms as members like Harvest Road, Harvey Beef, CMG. It needs them to be relevant.”

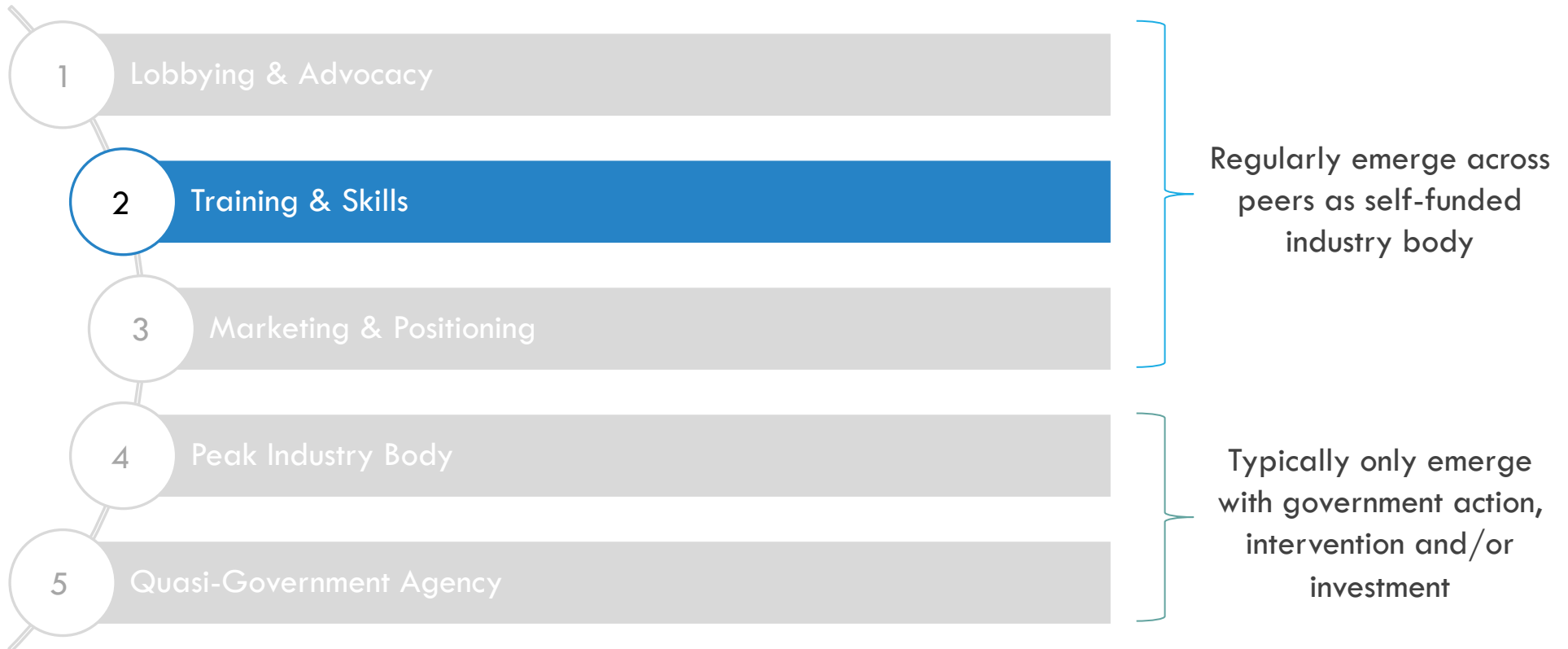
“Having a single point of contact to government is valuable. Being able to say that you represent the industry is powerful. The biggest disservice to ag in the state is WAFarmers and PGA not agreeing on topics or being one organisation (it's the only state that still has two organisations).”

“Government wants a point of view from industry. They want the industry point of view on various topics. Ideally, one that's agreed upon.”

“We need a lobby and advocacy group like we used to have. It must be linked across all the supply chain – product to plate (including retail and science). All industries impact each other and we could be more efficient if we worked together more with issues.”

“The lobbying at the moment for small firms at the State level is non-existent, it's basically at the regional and local level – if at all.”

Second, a model ‘Training and Skills’ focused industry organisation for Western Australian food and beverage manufacturers is developed



WA FOOD & BEVERAGE ASSOCIATION (WAFBA)

WHAT IS THE CONCEPT?

WAFBA's human resources team provides our members with expert, one-on-one advice on everything from staffing to leadership training, ensuring your workforce is made up of the right people in the right jobs at the right time. Following extensive consultation with our membership, WAFBA has designed and organised training and development initiatives to meet the specific needs and requirements of our industry.

GIVE ME THE ELEVATOR PITCH

The demand for a skilled and fully-trained workforce has never been greater. WAFBA offers a broad range of training programs and initiatives that are relevant, accessible and affordable to our members.

WHAT MIGHT THE OPERATING & FUNDING STRUCTURE LOOK LIKE?

HOW MANY STAFF WOULD BE EMPLOYED?	As little as 1-2 + volunteers* More with more resource
HOW MANY BOARD MEMBERS?	8-10
HOW MANY MEMBERS WOULD THE ORGANISATION LIKELY HAVE?	300-400
WHAT TYPES OF MEMBERSHIPS WOULD EXIST?	Organisations 1-9 staff Organisations 10-20 staff Organisations 20+ staff
WHAT WOULD BE THE AVERAGE FEES PER MEMBER?	~\$300
WHAT OTHER REVENUE STREAMS WOULD EXIST?	Conference fees Course & Seminar fees Sponsorships

WHAT RESOURCES & PUBLICATIONS WOULD BE PRODUCED?

- WAFBA Membership directory
- List of industry resources
- Directory of available support programs
- Industry Employment Jobs Board / Directory
- WAFBA Webcasts/Podcasts

WHAT ACTIVITIES & SERVICES WOULD BE DELIVERED?

- Training and development seminars
- Training 'University' in association with a regional university
- One-on-one advice on staffing and leadership training
- Coaching and mentoring matchmaking ('Ask An Expert')
- Strong schedule of social events that fund industry scholarships
- Industry Annual Conference
- Industry excellence & lifetime achievement awards banquet

WHAT ARE THE BEST PRACTICE GLOBAL MODELS?



* FIAQ appears to be all volunteer; Source: Coriolis research and analysis

How could it happen? How could it come together?

STRAWMAN FOR DISCUSSION

VISION: A wide range of Western Australian food processors decide to work together through WAFBA to improve industry skills through the development of shared training resources

1

Leaders from key WA food and beverage processors get together and acknowledge the need for a common set of shared industry training resources. They agree to work on this issue.

2

WA Food & Beverage Association (WAFBA) is formed.

Founding members identify key areas of focus.

WAFBA recruits a regional university as a partner in delivery. Leading industry participants with specialist skills are also identified.*

3

WAFBA develops and delivers a sequence of training events as webinars, workshops, seminars or courses.

Working with the local partner university, these courses can be aggregated into a recognised industry qualification (e.g. 'WAFBA University').

* These may be internal to member organisations or ex consultants to the industry; Source: Coriolis analysis

What is the concept?

“The demand for a skilled and fully-trained workforce has never been greater. Food & Beverage Manitoba offers a broad range of training programs and initiatives that are relevant, accessible and affordable to our members. Following extensive consultation with our membership, Food & Beverage Manitoba has designed and organized training and development initiatives to meet the specific needs and requirements of our industry.”

F&B/M website 2022



“Education Programs
Through advisory committees, MWFPA supports continuing industry education by sponsoring issue-specific seminars, workshops and conferences and provides scholarships in food science and agriculture through the University of Wisconsin.”



“Technical Education Program – SFPA University is a unique and low-cost educational workshop run by Clemson University for member plant personnel. Plant safety, FDA regulations, SQF certification and personnel management are topics typically provided from industry experts...”

Each year, SFPA University offers one-of-a-kind education on improving plant operations, food safety, workplace relations and other key metrics for member companies as well as non-members. The training is optimized for learning by using industry experts. The day-and-a-half event is considered the best way to provide operational training for the money.

\$175 for non-members and \$125 for member company personnel.”

SFPA website



“FIAQ aims to offer value and prospects for members by providing the opportunity to connect with services and advice they need to develop their businesses, and to attend a variety of on topic food manufacturing events to learn, keep up to date with market trends and connect with new markets by networking. Our goal is to provide our members with the knowledge to give their business a competitive edge to enhance and grow their businesses efficiently and competently.” FIAQ website





Food Industries Association of Queensland Inc.

Where would the organisation deliver? Where would it focus?

STRAWMAN FOR DISCUSSION

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

	Primary role
	Secondary activity

How would it deliver? Global peer group organisations have worked with regional educators to develop an industry relevant 'university'

EXAMPLE: SFPA UNIVERSITY ONLINE 2022



Laura Bonich

ANNOUNCING

SFPA University Online 2022

Developing strong leadership skills has never been so important for SFPA members. From hiring the right team members, to retention and mentoring, SFPA University Online is here to help.

GROWING HUMAN CAPITAL THROUGH LEADERSHIP IN 2022

Virtual Sessions with Leadership Counselor Laura Bonich

Laura is an expert in optimizing key leadership traits within food companies. Her background within major food brands, startups and as an executive search firm vice-president gives her important insights in understanding and coaching your leadership team's skills.

Who Should Attend?

Senior level management, human resources personnel, operations and frontline supervisors will benefit from these 90-minute virtual learning session delivered to your team members in a live, virtual environment. These sessions are provided to SFPA Members FREE OF CHARGE.

MARK THESE DATES/TIMES TO SCHEDULE YOUR TEAM THROUGHOUT 2022!

SFPA University Session

April 13, 2PM EDT

August 17, 2PM EDT

November 9, 2PM EST

Topics Covered

- Bring Your RUM To Work...It's Not What You Think
- Mentoring Mid-Levels To Senior Leaders
- How Hourly Workers Can Find Inspiration
- Helping Solve Off-Hour Family Life Problems
- Making Family-Owned Companies Thrive
- Making Innovation Important
- 3 Cues That They're Going To Leave
- Empowering Women In Your Workforce
- How To Encourage Employees To Truly Care
- The Human Factor For Front Line Supervisors
- Identifying Your Next Generation Leadership
- Maximize Your Recruiting Efforts

**MAKE YOUR COMPANY THRIVE ON HUMAN POWER.
MARK YOUR CALENDARS TODAY!**

How would it deliver? Global peer group organisations offer regular podcasts on industry topics, often involving organisation members

S2 Episode 5 - Everyone has something to teach you: A Conversation with Jessica Schwabach



Feb 8, 2022

Welcome to the fifth episode of Season 2 of the NJFPA Stradley Ronon Food Forum Podcast. In this episode, **Craig Peck**, Senior Manager of Business Development at **Rutgers Food Innovation Center**, speaks with **Jessica Schwabach**, co-founder and CEO of **Sundial Foods**. They talk about cutting-edge technology, plant-based foods,...

[Read More](#)

S2 Episode 4 - Plan, Pivot, Prosper, Repeat. A Conversation with Luke Bowen



Nov 23, 2021

Welcome to the fourth episode of Season 2 of the NJFPA Stradley Ronon Food Forum Podcast. In this episode, **Bill Mandia**, Partner at **Stradley Ronon Stevens & Young**, speaks with **Luke Bowen**, co-founder and president of **Evil Genius Brewing**. They talk about the many surprises and pivots along his professional journey.

Guest...

[Read More](#)

Can the state support a F&B manufacturing Training/Skills industry organisation? What you would need to believe

WILL THIS MODEL WORK IN WA: WHAT YOU WOULD NEED TO BELIEVE

An organisation could be developed that would...

Elements of the WA context that support this

Potential challenges in the WA context...

1) Fulfil a real industry need	<ul style="list-style-type: none"> - “Dutch Disease”^{**} means WA costs are high and firms need to keep working to maintain and improve productivity and efficiency - Challenging to hire good staff; need to develop own team - Would be supplying a growth market; AU and WA government regularly develop and launch new rules and regulations that create a need for new skills and training plus changing technology/markets - Numerous interviewees articulated that conceptually there was a need for food industry training and skills development in WA 	<ul style="list-style-type: none"> - Private provision crowded out in many areas by DPIRD and many other government agencies at all levels of government - General skills (e.g marketing) may be better addressed at wider level by a specialised provider? - Limited pool of common issues (e.g. food safety) - Many firms time poor and over-whelmed
2) Serve a large industry	<ul style="list-style-type: none"> - WA is a major producer of a wide range of food ingredients suitable for transformation into consumer products - WA has around 1,000 F&B manufacturing firms - F&B manufacturing is a long term growth platform for the state 	<ul style="list-style-type: none"> - Only ~50 of these firms are \$10m+ - Multinational likely have global in-house solutions - Many large F&B manufacturing firms have no “brains” in WA, so limited pool for any courses or seminars
3) Address a coherent industry	<ul style="list-style-type: none"> - WA has a active and growing F&B manufacturing industry - Numerous F&B manufacturing-specific skills exist without local training solutions currently in place in WA; industry training has – in practice - often been delivered ad hoc by on-the-job learning at well resourced large multinationals (e.g. Coca-Cola) 	<ul style="list-style-type: none"> - Large firms are fragmented and diverse, not clustered - Many firms see themselves as sector firms (e.g. wine not F&B mnfg.) and may be better served by sector solutions - Clear tension between casting a wide net (to get scale/revenue) and having a coherent agenda (e.g. distilling vs. fishing)
4) Provide valued roles and services	<ul style="list-style-type: none"> - Most WA F&B manufacturers are small; small firms struggle with staff development and training - Scale would deliver lower cost per course user 	<ul style="list-style-type: none"> - Significant potential for duplication of roles with existing providers - A “big ask” for a new market entrant to be competitive with existing solution providers - Mismatch between limited budget and extensive possible scope
5) Develop a robust funding model	<ul style="list-style-type: none"> - No lack of money; the richest country on earth if it was a country^{**} - Investment is flowing into the WA F&B manufacturing sector 	<ul style="list-style-type: none"> - Even with aggressive participation rates, the pool of members is small, limiting total membership-based budget - Small firms unlikely to value services enough

* https://en.wikipedia.org/wiki/Dutch_disease; ** per capita

WA F&B manufacturing could not support a small skills & training organisation without an annual subsidy (e.g. from government)

SIMPLIFIED 'TOY MODEL' – WA F&B MNFG. INDUSTRY ORGANISATION

					STRAWMAN TREAT AS CONCEPTUAL/DIRECTIONAL	
REVENUE						
SEGMENT	# OF POTENTIAL MEMBERS	ESTIMATED % THAT WOULD JOIN	IMPLIED MEMBERS	AVERAGE FEES/MEMBER	ANNUAL REVENUE	
F&B Manufacturer Large/Multinational	50	20%	10	\$800	\$8,000	
F&B Manufacturer Medium	100	80%	80	\$400	\$32,000	
F&B Manufacturer Small/SME	850	20%	170	\$200	\$34,000	
Associate Members	400	20%	80	400	\$32,000	
SUB-TOTAL	~1,400	~25%	340	~\$310	\$106,000	
Advertising & Sponsorships					\$25,000-75,000	
Workshops & Other Social Events					\$25,000-75,000	
TOTAL					~\$200,000	

COMMENTS/CONCLUSIONS

- This is a simple 'toy model' to quickly test the viability of this concept in Western Australia
- Obviously any group looking to move forward should do this properly
- Global peer group models are in larger areas with more large firms (e.g. US Midwest)
- The skills/training model primarily serves medium and growing small firms
- Membership fees are typically low fixed amounts (i.e. rather than a percent of revenue)
- Membership is typically extended to industry suppliers to grow revenue
- WA does not have a lot of firms and so cannot achieve high revenue
- Any attempt to form this type of organisation in WA would need to run a "very tight ship"
- **It is difficult to see how this lean a cost structure could support a wide workload; there is a real challenge here of overpromising and underdelivering**
- This model often degenerates into seminars put on by suppliers selling their products or services

EXPENSES

	ANNUAL
Staff (1 + 1 potentially part time)	\$230,000
Office/Other	\$20,000
Events	\$50,000
TOTAL	\$300,000
ANNUAL DEFICIT	-\$100,000

Industry saw a need for Training & Skills but thought this could be covered by existing providers

“The industry needs **food tech** support. Developing new products things like that. This is lacking across all Australia.”

“We need more **food technologists**. It’s impossible to find them and keep them in the State or attract them to the State. The pool of staff is really small in WA.”

“Training is needed at the **business level** for many firms. They need to be able to develop a good business plan and learn from the lessons of others. There are good Business Incubation Programs that work.”

“Many firms need training in the new WA Work, Health and Safety Act. Firms also need **Mental Health** training. There is a gap for this in WA.”

“Training and skills is covered by the Food and Fibre Industry Training Board. We have that already and at the Commonwealth level.”

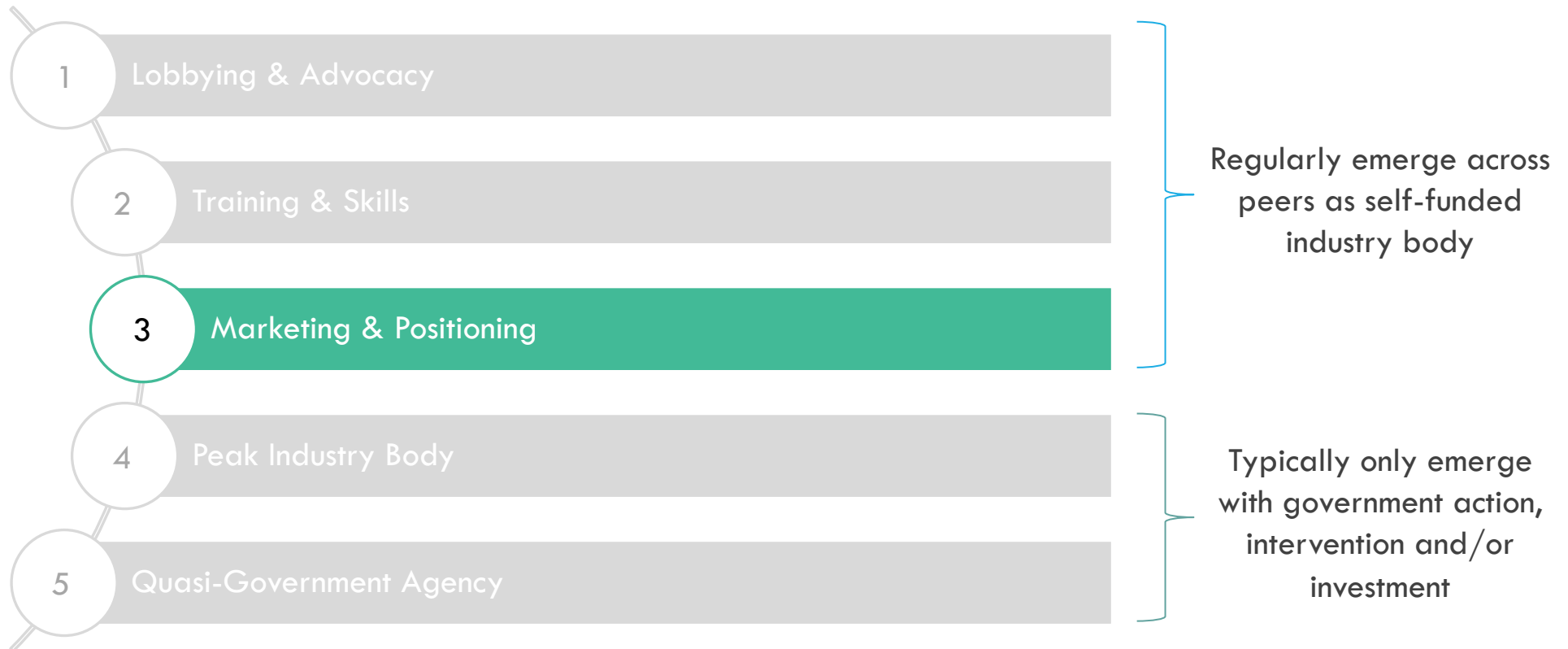
“The Australian College of Training covers the Food processors, HACCAP and other food type programs.”

“It’s hard to find the common ground in training. Common ground is limited between sectors.”

“For the more generic topics there is already a lot of training via Accountants, AIM, BDO, Training facilities. Then other training is very sector specific so is done by the National agencies. Not sure there is scale for WA specific training. Local organisations should just network with other successful organisations.”

“AgriStart is a really good program, but many firms don’t have time to attend courses, they are so busy doing their jobs.”

Third, a model ‘Marketing and Positioning’ focused industry organisation for Western Australian food and beverage manufacturers is developed



TASTE OF WESTERN AUSTRALIA (ToWA)

WHAT IS THE CONCEPT?

We are a truly unique organisation, owned by over 1,000 members including food and drink producers, restaurants, cafes, pubs, hotels, farm shops and specialist retailers in Western Australia - all passionate about the provenance and quality of the products they make, serve or sell. The Taste of Western Australia Awards are the Oscars of the region's food industry and they celebrates the high level of quality we produce.

GIVE ME THE ELEVATOR PITCH

Taste of Western Australia work together with support from our members, sponsors and partners for a sustainable future in Western Australian food and drink. The results so far from this year's ToWA Awards are a true reflection of the provenance, quality and integrity that food and drink producers in the West have to offer. Winners use the logo to promote their products.

WHAT MIGHT THE OPERATING & FUNDING STRUCTURE LOOK LIKE?

HOW MANY STAFF WOULD BE EMPLOYED?	5 (FT/PT) + volunteer judges	
HOW MANY BOARD MEMBERS?	6-8	
HOW MANY MEMBERS WOULD THE ORGANISATION LIKELY HAVE?	~400 food & drink producers ~900 hospitality operators ~200+ food retailers	
WHAT TYPES OF MEMBERSHIPS WOULD EXIST?	Producer Hospitality	Retail Affiliate
WHAT WOULD BE THE AVERAGE FEES PER MEMBER?	\$250	
WHAT OTHER REVENUE STREAMS WOULD EXIST?	Membership fees Contest Entry Fees Awards Dinner Costs Sponsorships Front-of-pack/window stickers Other revenue	

WHAT RESOURCES & PUBLICATIONS WOULD BE PRODUCED?

- ToWA Consumer Directory "Guide to Winners"
- ToWA Recipe Book
- ToWA Social Media

WHAT ACTIVITIES & SERVICES WOULD BE DELIVERED?

- ToWA Awards
- ToWA Black Tie Awards Dinner (possibly multiple regional events)
- Use of ToWA award logos
- ToWA Meet the Buyer Events
- ToWA Farmers Market Events

WHAT ARE THE BEST PRACTICE GLOBAL MODELS?



How could it happen? How could it come together?

STRAWMAN FOR DISCUSSION

VISION: The Taste of Western Australia Awards are the Oscars for the state's food & drink industry. It's the time of year when producers wait with bated breath to see how their products have been received by the prestigious Great Tasting judging panel.

1

A group of visionary 'gourmets and foodies' get together and create an organisation to celebrate the best of Western Australian food and beverages.

2

Taste of Western Australia (ToWA) is formed as an industry owned cooperative.

A comprehensive set of award categories are developed across food and beverage processing, hospitality and retailing.

Leading regional chefs and other taste leaders are recruited as judges.

3

ToWA awards become a major annual fixture of the Western Australian food industry.

ToWA awards are regularly celebrated with (1) on-pack stickers, (2) in-window signs and (3) in advertising and promotional material.

ToWA awards are recognised and sought out by regional consumers.

What is the concept?

"Taste of the West is the largest independent regional food group in the UK and we work hard to promote and support fantastic local food and drink... We are a truly unique organisation, owned by over 1,000 members including food and drink producers, restaurants, cafes, pubs, hotels, farm shops and specialist retailers in the South West - all passionate about the provenance and quality of the products they make, serve or sell..."

The Taste of the West Product Awards programme comprises 23 food and drink categories. Just over 1,000 products were entered this year and panels of experts evaluated each product individually, assessing its appearance, aroma, texture, packaging, and most importantly its taste. The results revealed 320 Gold, 206 Silver and 149 Highly Commended awards to over 300 producers throughout the South West. All the judges were very impressed with the quality and above all the consistency at such a high level of production within the industry.

The Taste of the West Hospitality and Retail Awards scheme comprises 12 categories. This year entries were received from almost 350 establishments across the South West. We sent our team of experienced, professional judges out to each and every one to eat and shop their way around them all, and the results concluded in a staggering 200 Gold awards. We are constantly impressed by how the quality within the hospitality and retail industry has risen and continues to do so year after year."

Taste of the West website and brochure



South West England has a population of 5.1m

"The Great Taste Awards are the Oscars for the food & drink industry It's the time of year when producers across the world wait with bated breath to see how their products have been received by the prestigious Great Tasting judging panel. 2021 saw no fewer than 12,000 entries to the leading international food and drink awards. This year the products were in the judging room where, with Covid safe measures in place, each was put through their paces by over 500 judges. The whole process took up to six weeks. It's a massive logistical operation but it is this level of scrutiny and robust judging that enables the awards to consistently stand out. So, who will be this year's winners of the highly sought after one, two, or three stars?" The Food Marketing Experts UK



"Why enter? Apart from media recognition and the prestige of using award success in your marketing if you're a winner, every entrant who chooses to can get valuable and constructive feedback on their entry. The independent panel of experienced judges will mystery shop the Hospitality and Retailer entries, and blind-taste the Producer entries. For the small investment of time to complete your entry, you can receive a confidential appraisal of your products and services as they are presented to your customers, helping you maintain and improve your quality standards." FDD website





Devon has a population of 1.2m

Where would the organisation deliver? Where would it focus?

STRAWMAN FOR DISCUSSION

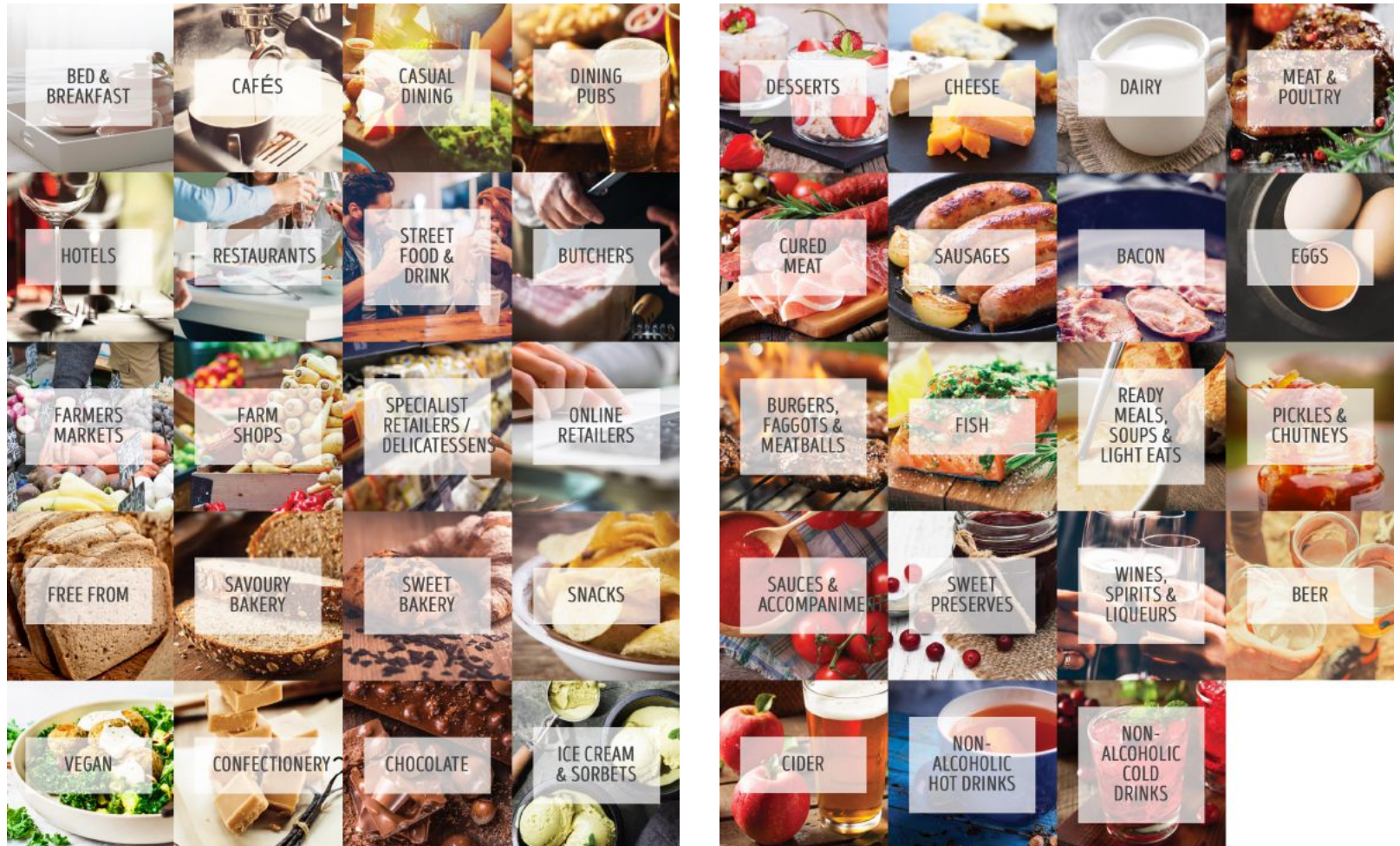
FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

	Primary role
	Secondary activity

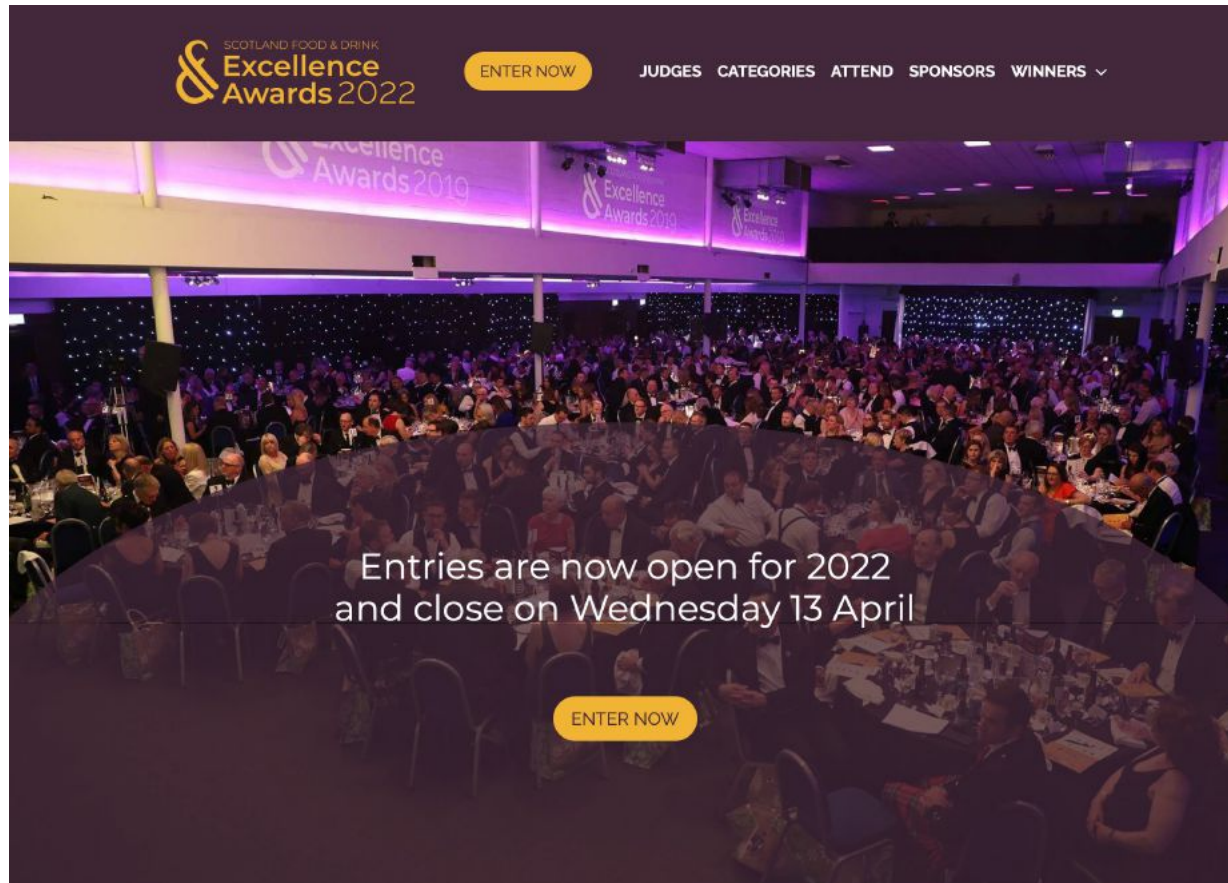
How would it deliver? Global peer group organisations deliver regional food awards across a wide range of categories

EXAMPLE: TASTE OF THE WEST (UK) AWARD CATEGORIES



How would it deliver? Key awards are given out at a black tie industry event

EXAMPLE: SCOTLAND FOOD & DRINK EXCELLENCE AWARDS EVENT



How would it deliver? Winners can use their awards in consumer facing promotional activity

EXAMPLE: USE OF GREAT TASTE STARS

WHAT DO THE STARS MEAN?

Each jar, packet or bottle displaying a Great Taste logo is a guarantee every product has been through the rigorous and independent judging process. The logo will display the year it was judged and a star-rating.

IT'S NOT ABOUT SMART PACKAGING OR CLEVER MARKETING - IT'S ALL ABOUT GREAT TASTE.

3-STARS: EXQUISITE

Extraordinarily tasty foods – around 2% of products are awarded 3-stars each year. Don't leave the shop without buying it!

2-STARS: OUTSTANDING

Above and beyond delicious – less than 10% of entries will achieve this rating.

1-STAR: SIMPLY DELICIOUS

A food that delivers fantastic flavour – approximately 25% of entries will achieve this rating each year.

TO SEARCH FOR ALL GREAT TASTE WINNERS PAST & PRESENT GO TO: GREATTASTEAWARDS.CO.UK

FINE FOOD | gff.co.uk | greattasteawards.co.uk | @guildoffinefood #greattasteawards #ispygreattaste

Making the most out of your Great Taste Award win

Having worked so hard to gain a Great Taste Award, what should you do when you receive confirmation of your distinguished accolade? Here are some top tips to consider to help spread the news, and ultimately, make the most of your achievement.

1. Prioritise sharing the great result far and wide: For example:

- Share on social media, both in posts and stories. Update your social media bios with your wins
- Use the judge's feedback as quotes for your social media and marketing material
- Update your website to announce the wins
- Add to your email signature
- Send out a press release to both trade and consumer titles
- Share it with your local radio station and press (including digital)
- Include in any newsletter activity to your consumers
- Include in any newsletter activity to trade customers and incorporate the judges feedback

2. Add the Great Taste winner logo to your packaging

3. Leverage the news to open up new opportunities and to sell into buyers representing outlets where you would like to see your products stocked. Remember GTAs are recognised globally.



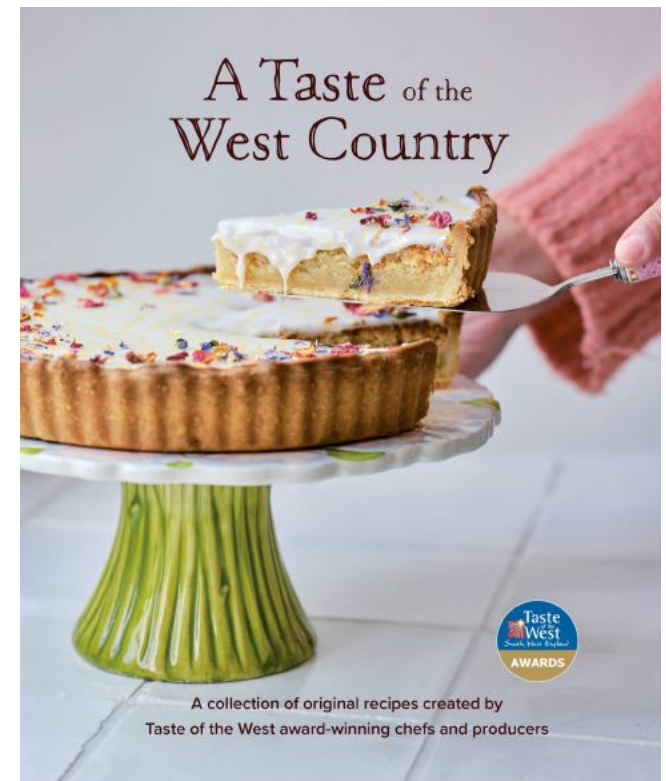
How would it deliver? Winners can use their awards in consumer facing promotional activity

EXAMPLE: USE OF AWARDS IN ADVERTISING & PROMOTIONAL MATERIAL



How would it deliver? Global peer group organisations have delivered regional food guides and cookbooks

EXAMPLE: AWARD RELATED PUBLICATIONS



How would it deliver? Global peer group organisations have clear processes for award entry; while all can enter, fee structure favours membership

EXAMPLE: FOOD DRINK DEVON (UK) AWARD ENTRY PROCESS



Food Drink Devon Awards 2022 Producer Entry Form

Entries Close 5pm Friday 22 April 2022.

Entry Fee

The Devon Producer Awards are open to Food & Drink producers based in Devon using Devon ingredients.

Individual products will be blind tasted by an independent and unbiased expert judging panel and outstanding products will be awarded Silver, Gold or Platinum awards. An independent adjudicator will verify the results and winners.

Silver Awards will be given to those entrants achieving 80-89%, Gold Awards to 90-99% and Platinum Awards to those achieving a faultless 100%.

- **Food Drink Devon Members** – Entry is free for 2 products per company, then £35 +VAT per additional product
- **Non-Members** – Entry is £35 +VAT per product

Entry fees will be deducted from your first year's membership costs, if you sign up for Food Drink Devon membership before 30 April 2022.

All producers submitting an entry agree to sending samples of their entered products to us in June.

For all queries please contact Ali Neagle on 07789 666064 or email admin@fooddrinkdevon.co.uk

Food Drink Devon has three broad categories of awards: producer, retail and hospitality

Devon has a population of 1.2m

Can the state support a F&B manufacturing Marketing/Positioning industry organisation? What you would need to believe

WILL THIS MODEL WORK IN WA: WHAT YOU WOULD NEED TO BELIEVE

An organisation could be developed that would...

Elements of the WA context that support this

Potential challenges in the WA context...

1) Fulfil a real industry need	<ul style="list-style-type: none"> - Owner/managers of small F&B manufacturers work "in the business not on the business" and struggle with sales and marketing - Awards create a real talking point / point-of-difference - Model has proven success in supporting small F&B manufacturers in regions with strong cultural parallels 	<ul style="list-style-type: none"> - Model is currently unproven in WA; no/low understanding of model without explanation/education/awareness of past endeavours - Despite the example of Devon with less than half the population of WA, some believe the industry cannot sustain this type of award - Some limited overlap with DPIRD managed 'Buy West, Eat Best'
2) Serve a large industry	<ul style="list-style-type: none"> - WA is a major producer of a wide range of food ingredients suitable for transformation into consumer products - WA has around 950 small/medium F&B manufacturing firms - F&B manufacturing a long term growth platform for the state - Model can deliver a large pool of participants by adding and including regional F&B retailers, foodservice and hospitality venues 	<ul style="list-style-type: none"> - Hospitality and foodservice still recovering from impact of COVID - Target group as defined lacks a single point-of-contact or media channel; numerous different, fragmented touchpoints - Challenging to "get out the word", particularly in early years
3) Address a coherent industry	<ul style="list-style-type: none"> - WA has a active and growing F&B manufacturing industry with over 1,000 businesses* and over 300 store based bakeries - WA has a robust foodservice and hospitality sector with over 8,900 hospitality businesses - WA has a innovative premium/gourmet retail sector with over 2,300 food and beverage retailer businesses 	<ul style="list-style-type: none"> - Tension between casting the largest possible net and having a coherent industry pool - Many firms see themselves as sector firms (e.g. wine not F&B) - Potential conflict over what "of WA" criteria means - location, ownership or origin of produce
4) Provide valued roles and services	<ul style="list-style-type: none"> - Small F&B firms struggle with marketing; consumer-facing awards would support stronger taste/quality messaging - Gives credibility, legitimacy and quality endorsement to products 	<ul style="list-style-type: none"> - Potential overlap with other consumer-facing awards in Australia at all levels and across multiple sectors (e.g. dairy, Royal Agricultural Society of WA) - Possible mismatch between limited budget and extensive possible scope; need for staged growth plan (crawl, walk, run)
5) Develop a robust funding model	<ul style="list-style-type: none"> - Model proven to work in smaller regions (e.g. Devon, UK with 1m people) - Model can target a wider pool of members/participants than just F&B manufacturing, including hospitality, foodservice and retail 	<ul style="list-style-type: none"> - Global best practice in peer group regions shows low fees - Model needs to attract a relatively small amount of fees from a relatively large number of firms; this can be challenging - Model appears to require willing volunteers (e.g. experienced chefs as judges); however attracting these may be a challenge

* This count excludes on-farm food processing operations (see ANZSIC code definitions at ABS)

WA could support a Marketing/Positioning organisation if it has a wide membership base beyond just food and beverage processors

SIMPLIFIED 'TOY MODEL' – WA F&B MNFG. INDUSTRY ORGANISATION

STRAWMAN

TREAT AS CONCEPTUAL/DIRECTIONAL

REVENUE					
SEGMENT	# OF POTENTIAL MEMBERS	ESTIMATED % THAT WOULD JOIN	IMPLIED MEMBERS	AVERAGE FEES/MEMBER	ANNUAL REVENUE
F&B Manufacturers	1,000	40%	400	\$250	\$100,000
F&B Foodservice/Hospitality	8,900	10%	890	\$250	\$222,500
F&B Retail	2,300	10%	230	\$250	\$57,500
SUB-TOTAL	12,150	17%	1,520	~\$250	\$380,000
Entry Fees (for additional products)					\$50,000-150,000
Advertising & Sponsorships					\$200,000-400,000
Conference & Other Events					\$200,000-400,000
TOTAL					~\$1,100,000

COMMENTS/CONCLUSIONS

- This is a simple 'toy model' to quickly test the viability of this concept in Western Australia
- Obviously any group looking to move forward should do this properly
- Global peer group models are in larger areas with more large firms (e.g. California)
- The marketing/promotion model primarily serves small firms
- Revenue comes from a wide range of sources and advertising/sponsorships accounts for ~30%
- For this model to work, industry taste makers (e.g. chefs) would need to volunteer significant team time to judging across the product categories
- **The critical period for this model is during the early days; difficult to 'get off the ground' due to chicken/egg problem solved only by the consumer seeking out awarded products/services**

EXPENSES

	ANNUAL
Staff (3 + 2 part time)	\$600,000
Office/Other	\$200,000
Events	\$300,000
TOTAL	\$1,100,000

WA currently has a number of awards and competitions as part of individual organisations marketing programs, many industries have more than one

LOCAL AWARDS AND EVENTS

FOOD PRODUCER FOCUS AWARD



PERTH ROYAL SHOW

<https://perthroyalfoodawards.raswa.org.au/food-beverage-competitions/>

- 11 Food and Drink Awards (Beer, Chocolate, Dairy, Bread and Pastry, Distilled Spirits, Wine, Smallgoods, Branded pork, Branded lamb, Branded beef, Branded poultry); not just for regional producers
- Gold, Silver and Bronze
- \$33 entry



WA GOOD FOOD GUIDE

<https://wagoodfoodguide.com>

- Top Guides and Awards focused on **Hospitality** and **Foodservice**, Chefs, Sommelier, Leadership, Producer
- Includes Wine and Beer awards
- Jobs available service



RESTAURANT AND CATERING ASSOCIATION STATE AWARDS*

<https://www.rca.asn.au/2022-wa-awards-excellence>

- Excellence Awards, **Hospitality** Staff and Business Awards (includes a Product Supplier award) and Lifetime and Young Achievers Awards
- WA had 26 Excellence award categories in 2021



PLATING UP WA

<https://www.platingupwa.com.au>

- **Restaurants** and venues showcase their hero dish (supplied by local farmers, producers) over June



TASTE GREAT SOUTHERN

<https://www.wineandfood.com.au/taste-great-southern>

- Since 2015 supported by GSDC
- Shop and **eat local** campaign over May

All wine regions have their individual wine shows, plus the Portavin Wine Show of Western Australia

Marketing & Positioning via awards and competitions allows your brand to stand-out on the shelf

“The Food Industry Association of WA Awards nights used to be really good. We would get 500 people and it had good recognition. They were across about seven categories. They were really well supported. Firms could win in Innovation, Best Retail Product, Best Marketing, Best Foodservice Product, Supply Chain award, Service to Industry, Sustainability and the Environment.”

“The office at Vesco still has their industry award in the foyer, it means something. It lets you stand out and be recognised.”

“Awards are good we used to have those in the State, other industries have a lot like restaurants and wine. The food manufacturers don't really have any for the State.”

“Awards help recognise good achievements. Awards nights are very popular, it's the opportunity to network in a really positive environment.”

“From a marketing perspective you would need to find something that appealed broadly to all F&B manufacturers. Something that they all think their customers value, like sustainability.”

“We have the Perth Royal show awards which covers the food categories, but that also includes firms from out of state, so it's not just promoting our firms.”

“Extending the products and offer in the Good Food Guide would be good.”

Fourth, a model 'Peak Industry Body' for Western Australian agrifood and food and beverage manufacturing is developed



WESTERN AUSTRALIAN AGRIFOOD COUNCIL (WAAFC)

WHAT IS THE CONCEPT?

The Western Australian AgriFood Council (WAAFC) represents the state's farming and food industries including companies, trade and farmers' associations. It acts as the peak industry body for organisations. WAAFC is a consolidation of the strengths of the food industry and brings together 90% of the annual business volume of a \$20 billion industry.

GIVE ME THE ELEVATOR PITCH

The Western Australian AgriFood Council (WAAFC) handles the professional interests of its members, including:

- Overall industrial policy and regulatory framework
- Research and innovation policy
- Trade and market policy
- Animal welfare & food safety
- Environmental, energy and public health issues & policies

WHAT MIGHT THE OPERATING & FUNDING STRUCTURE LOOK LIKE?

HOW MANY STAFF WOULD BE EMPLOYED?	6-10
HOW MANY BOARD MEMBERS?	20
HOW MANY MEMBERS WOULD THE ORGANISATION LIKELY HAVE?	An association of 20+ state industry bodies and other associations
WHAT TYPES OF MEMBERSHIPS WOULD EXIST?	Farmer organisation Processor organisation Associated organisation
WHAT WOULD BE THE AVERAGE FEES PER MEMBER?	As currently; new structure serves to pool costs to reduce overheads
WHAT OTHER REVENUE STREAMS WOULD EXIST?	State and federal government funds Government grants Potentially some levies funds passed on

WHAT RESOURCES & PUBLICATIONS WOULD BE PRODUCED?

- Press releases
- Policy papers
- Technical and regulatory bulletin
- Fact sheets
- Industry guides
- Annual industry statistics
- Industry strategies (e.g. climate neutral, sustainability)

WHAT ACTIVITIES & SERVICES WOULD BE DELIVERED?

- Government representation (both industry and targeted)
- Advocacy: handling the professional interests of its member organisations
- Industry leadership roundtables
- Group buying and negotiated bulk discounts (e.g. insurance)
- Front line legal advice

WHAT ARE THE BEST PRACTICE GLOBAL MODELS?



How could it happen? How could it come together?

STRAWMAN FOR DISCUSSION

VISION: A mega-merger of key state-level industry organisations into the WA AgriFood Council (WAAFC) creates a peak body that successfully and efficiently represents the state's farmers and food processors to government and other stakeholders

1

A number of key Western Australian industry organisations agree to a mega-merger to (1) share non-value adding costs and (2) increase industry influence.

2

The merged organisation has greater management capability and depth without smothering the inherent differences between member organisations.

WAAFC delivers superior outcomes to member organisations than previous fragmented arrangements.

WAAFC member organisations deliver superior value-for-money to their members.

3

Additional WA industry organisations are attracted to join WAAFC.

Newly formed WA industry organisations join WAAFC.

WAAFC comes to represent 80-90% of WA agrifood by value.

What is the concept?

“The Danish Agriculture & Food Council represents the farming and food industries of Denmark including companies, trade and farmers’ associations... DAFC was formed on 3 June 2009 by a merger of the Agricultural Council, Danish Slaughterhouses, Danish Pig Production, Danish Agriculture with the Agricultural Media and the Danish Agricultural Advisory Service, as well as significant parts of the Dairy Association's activities. The Danish Agriculture & Food Council:

- Promotes the political influence of the agricultural and food sector
- Offers a comprehensive range of cost-effective services for its members
- Implements research and development programmes within food safety and veterinary issues, animal health and productivity, animal welfare, environment and energy.

The Danish Agriculture & Food Council handles the professional interests of its members, including:

- Overall industrial policy and regulatory framework
- Research and innovation policy
- Trade and market policy and the EU Common Agricultural Policy (CAP)
- Animal welfare
- Food safety
- Environmental and energy policies.”



Danish Agriculture
& Food Council

“CTAQ, the voice of the food industry

OUR MISSION: The CTAQ's mission is to orchestrate excellence and sustainable growth in the food processing sector by supporting its stakeholders and unifying the ecosystem.

OUR VISION: Be the catalyst for the collective intelligence of the sector that stimulates the sustainable growth of the Quebec food processing industry.”

CTAQ

“ABOUT IBEC: Ibec is Ireland's largest lobby and business representative group. Our purpose is to help build a better, sustainable future by influencing, supporting and delivering for business success. With over 250 employees, Ibec engages with key stakeholders in Ireland and internationally through our six regional offices and our Brussels office, along with an extensive international network in the UK and US. Ibec positions are shaped by our diverse membership, which range from small to large, domestic to multinational and our 40 trade associations cover a wide range of industry sectors. Ibec members employ over 70% of the private sector workforce in Ireland. As well as lobbying, Ibec provides a wide range of professional services and management training to members on all aspects of human resource management, occupational health and safety, employee relations and employment law.”



Ibec

Peer group illustrated two related concepts under this model

HAVE A MEGA-MERGER OF MAJOR AGRIFOOD INDUSTRY BODIES

THE DANISH MODEL



“Speaking with one voice to increase the influence of the industry”

HAVE A COMMON SERVICE PROVIDER TO AGRIFOOD INDUSTRY ORGANISATIONS

THE IRISH MODEL



“Provision of industry body services at advantageous rates”

THE QUEBEC MODEL

“Speak with one voice where it makes sense and share costs”



Ireland and Quebec both illustrate peak bodies that act to share overheads and build scale while maintaining distinctive identities within the group



Chocolate and Confectionery Association of Ireland (CCAI)



FOOD IMPROVEMENT QUEBEC (AAQ)



Canard du Québec

ASSOCIATION OF DUCK AND GOOSE BREEDERS OF QUEBEC (AECOQ)



THE QUEBEC FOOD MANUFACTURERS ASSOCIATION (AMPAQ)



THE ASSOCIATION OF WINE BOTTLERS (ANEV)



ASSOCIATION OF SMALL WATER BOTTLERS OF QUEBEC (APEEQ)



ASSOCIATION OF MEAD AND HONEY ALCOHOL PRODUCERS OF QUEBEC (APHAMQ)



ASSOCIATION OF ARTISAN COFFEE ROASTERS OF QUEBEC



THE BOARD OF BAKERY QUEBEC (CBQ)



MAPLE INDUSTRY COUNCIL (CIE)



CONSEIL QUÉBÉCOIS DU CANNABIS COMESTIBLE QUEBEC EDIBLE CANNABIS COUNCIL (CQCC)



QUEBEC POULTRY PROCESSING COUNCIL (CQTV)



INITIA FOUNDATION



ASSOCIATION OF QUEBEC MEAT PROCESSORS (RTVQ)



QUEBEC UNION OF MICRODISTILLERIES (UQMD)

Where would the organisation deliver? Where would it focus?

STRAWMAN FOR DISCUSSION

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

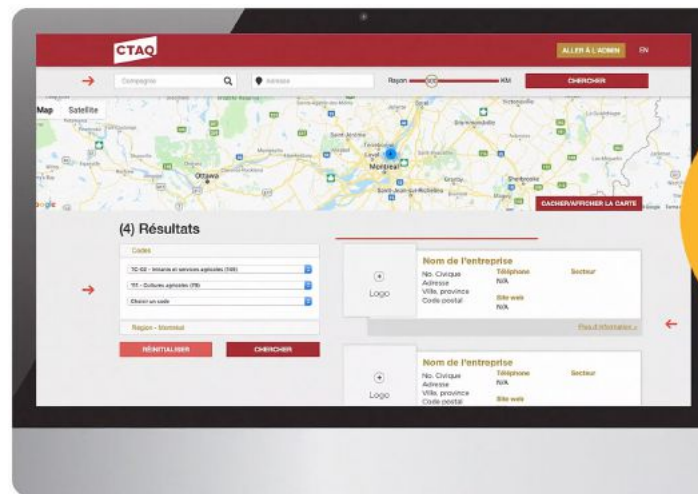
Primary role
 Secondary activity

What would it deliver? Global peer group deliver a comprehensive industry database suitable for a wide audience

Discover the industry's SNAC

VOTRE ENTREPRISE

CTAQ
NOUVEAU!



Trouver des partenaires

What would it deliver? Global peer group publishes guides on industry topics (e.g. “Reformulating Products to Reduce or Eliminate Trans Fats”)



Reformulation des produits pour réduire ou éliminer les gras trans:

Un guide pour l'industrie alimentaire



Annexe 1 | 1 Recommandations de produits sains de substitution aux graisses trans selon l'application alimentaire

(Tiré du rapport final du Groupe d'étude sur les graisses trans – juin 2006)

AGP : graisses polyinsaturées
AGM : graisses monoinsaturées

TABLEAU 1 | SUBSTITUTS ACTUELLEMENT DISPONIBLES ET SUBSTITUTS POSSIBLES AUX HUILES ET AUX GRAISSES PARTIELLEMENT HYDROGÉNÉES

Application	Substituts conseillés	Huiles	Caractéristiques ¹				Effets ²
			Autres	AGM	AGP	AGS	
Margarines à friture	Huiles végétales à stabilité moyenne et élevée	- Canola à haute teneur en acide oléique - tournesol à haute teneur en acide oléique - Soja à faible teneur en acide linoléique - Tournesol à teneur moyenne en acide oléique	Mélanges	+	-	-	A, B
			Autres	+	+	ND	B, C
Margarines à usage domestique et pour services alimentaires (mottes)	Huiles interstitielles avec de l'huile végétale	- Stéarines de palme et de palmitate avec des huiles de canola - Huiles végétales entièrement hydrogénées et huiles végétales liquides avec des huiles végétales	Mélanges	+	+	-	A, B
			Autres	+	+	+	D, E
Margarines à usage domestique et pour serv. alim. (durs)	Huiles interstitielles avec de l'huile végétale	Stéarines de palme et de palmitate avec des huiles de soja Huiles végétales entièrement hydrogénées et huiles végétales liquides avec des huiles végétales	Mélanges	+	+	+	E, F
			Autres	+	+	+	F, G
Margarines de pâtisseries	Mélange huiles liquides et huiles hautement saturées Huiles interstitielles avec de l'huile végétale	Huile de palme, stéarines de palme et huiles végétales ordinares Stéarines de palme et de palmitate avec des huiles de soja Huiles végétales entièrement hydrogénées et huiles végétales liquides avec des huiles végétales	Mélanges	+	+	+	A, G
			Autres	+	+	+	D, C

LÉGENDE du tableau des Substituts

Note 1: (CARACTÉRISTIQUES)
AGM : acides gras monoinsaturés
AGP n-6 : acides gras polyinsaturés de type oméga-6
AGP n-3 : acides gras polyinsaturés de type oméga-3
AGS : acides gras saturés
- teneur faible
+ teneur moyenne
= teneur élevée

Note 2 : (EFFETS)
Les commentaires au sujet des effets sur la santé sont faits en comparant des produits sensiblement contenant des huiles partiellement hydrogénées.

- Effets positifs
- A - Meilleur profil d'acides gras, notamment le rapport des teneurs en acides gras n-6 et n-3.
 - B - Peut contribuer à une alimentation qui réduit les risques de maladies cardiovasculaires.
 - D - Meilleur profil d'acides gras que le beurre et les margarines dures, qui contiennent plus d'acides gras saturés et moins d'AGP.
 - E - Peut réduire le rapport du taux total de cholestérol (ou LDL) au taux de HDL.
 - F - Meilleur profil d'acides gras que le beurre, qui a une teneur élevée en acides gras saturés à chaîne longue.
 - G - Peut réduire le rapport TC/HDL ou LDL/HDL.
 - H - Meilleur profil d'acides gras que les shortenings d'huile hautement saturés ou les graisses animales.

Effets négatifs
C - Rapport des teneurs en acides gras n-6 et n-3 plus élevé.

TABLEAU DES SUBSTITUTS (SUITE)

Application	Substituts conseillés	Huiles	Caractéristiques ¹				Effets ²
			Autres	AGM	AGP	AGS	
Margarines de pâtisseries (durs et de laminage)	Mélange huiles liquides et huiles hautement saturées Huiles interstitielles avec de l'huile végétale	Huile de palme, stéarines de palme et huiles végétales à stabilité élevée Stéarines de palme et de palmitate avec huiles de soja Huiles végétales entièrement hydrogénées et huiles végétales liquides avec des huiles végétales	Mélanges	+	-	-	E, F
			Autres	+	+	+	F, G
Shortening solide pour produits de pâtisseries et de transformation	Mélange d'huiles pour solides et usage permanent Huiles interstitielles avec de l'huile végétale	Huile de palme, stéarines de palme et huiles végétales à stabilité moyenne Stéarines de palme et de palmitate avec huile de canola à haute teneur en acide oléique Huiles végétales entièrement hydrogénées et huiles végétales liquides avec des huiles végétales	Mélanges	+	+	+	A, E
			Autres	+	+	+	A, E
Shortening en vaporisateur et liquide pour produits de pâtisseries et de transformation	Huiles végétales ordinares Huiles végétales à stabilité moyenne et élevée	Huiles de canola ou de soja Canola à teneur élevée en acide oléique Mélange résistance à l'oxydation que les huiles végétales ordinares Soja à teneur faible en acide linoléique et teneur moyenne en acide oléique	Mélanges	+	+	+	E, H
			Autres	+	+	+	E, H

What would it deliver? Global peer group present industry innovation awards



CATÉGORIE PRODUITS NOUVEAUX OU AMÉLIORÉS

- A** ALCOOLS DISTILLÉS
Ubald Distillerie – Distillery pour sa Vodka de patate, Route 363
- B** CHOCOLATS, COLLATIONS, DESSERTS ET CONFISERIES
Chocmod Canada inc pour ses Bouchées KETO au cacao
- C** JUS & BOISSONS
LOOP Mission pour ses Sodas probiotiques
- D** METS PRÉPARÉS, PRÊTS À SERVIR OU À ASSEMBLER
Chickumi pour son Bâtonnet de houmous Buffalo et sa sauce BBQ à l'érable
- E** PRODUITS DE BOULANGERIE / PÂTISSERIE
Simply Grain pour son Mélange à Pain et Pâtisserie Simply Grain
- F** PRODUITS DE LONGUE CONSERVATION
Signé caméline pour son Huile de caméline torréfiée Signé caméline
GoGo Quinoa pour sa Gamme de céréales GoGo Quinoa
- G** PROTÉINES VÉGÉTALES
Gusta Foods pour Les hachés végés

CATÉGORIE EMBALLAGE

- H** KLR Systems pour son Attache à pain en carton

CATÉGORIE TECHNOLOGIE & PRODUCTIVITÉ

- I** Innodal pour Inneo, solution anti-listéria naturelle et efficace !

COUP DE CŒUR DU JURY

- J** La Bêlerie pour sa Quiche œuf de canne et agneau

PRIX ENTREPRENEURIAT BANQUE NATIONALE

- K** LOOP Mission

PRIX ENTREPRISE INNOVANTE DESJARDINS

- L** A. Lassonde inc.

PRIX PRODUCTIVITÉ INVESTISSEMENT QUÉBEC

- M** Distillerie NOROI

PRIX ÉCO-RESPONSABLE FASKEN

- N** ENTOMOprotéine

Can the state support an agrifood peak industry organisation? What you would need to believe

WILL THIS MODEL WORK IN WA: WHAT YOU WOULD NEED TO BELIEVE

An organisation could be developed that would...

Elements of the WA context that support this

Potential challenges in the WA context...

1) Fulfil a real industry need

- WA has over a hundred industry organisations serving some part of the agrifood value chain; inefficiency and duplication are high; few organisations share costs
- Currently no advocacy/lobbying total “voice of the industry”
- Fragmented, diverse agrifoods currently “punch under their weight” in a state focused on mining
- “Dutch Disease”^{*} means WA costs are high and firms need to keep working to maintain and improve productivity and efficiency

- Consolidation of industry into a single voice may actually lessen impact (one voice versus hundreds)
- Some potential activities crowded by DPIRD and many other government agencies at all levels of government
- May not be enough common issues; may not agree (e.g. primary processors wanting higher prices and value added users lower)

2) Serve a large industry

- WA is a major producer of a wide range of food ingredients and food and beverage products; each sector, category, segment or division of this complex industry can hypothetically support its own industry body; a WA peak industry body has a large pool of potential target sub-organisations for service provision
- Potentially 17,000 target businesses along the supply chain that could be represented by a peak body; WA has over 13,000 farming businesses, over 1,000 fishing businesses, over 1,000 F&B manufacturers, over 1,300 agriculture and food-related wholesalers and around 90 fruit & vegetable packhouses

- Clear tension between casting a wide net (to get scale/revenue) and having a coherent agenda (e.g. distilling vs. fishing)
- An area the size of Western Europe with the population of Jamaica
- Spread out nature of WA agrifood landscape may push against centralisation in places

3) Address a coherent industry

- WA has a active and growing agrifood industry
- Numerous interviewees articulated that conceptually there was a need for an organisation playing this role in WA

- Numerous strong personalities would need to work together
- Representing a potentially fragmented and diverse universe
- Many firms see themselves as sector firms (e.g. wine not agrifood)

4) Provide valued roles and services

- Individual F&B manufacturers can find locating, addressing, responding to and handling other chain stakeholders challenging on their own; working together on shared issues
- Clear low hanging fruit exists that would create real cost savings

- Realising potential saving may require redundancies
- Realising potential savings may reduce need for management; interests of organisation members (value for money) may clash with desire of existing organisation leadership to maintain “kingdom”

5) Develop a robust funding model

- More than 100 identified industry organisations based in WA and serving some part of the chain; aggregate funds are large
- Model clearly works across multiple regions with strong parallels (UK, USA, Canada); clear long run stability when up and running

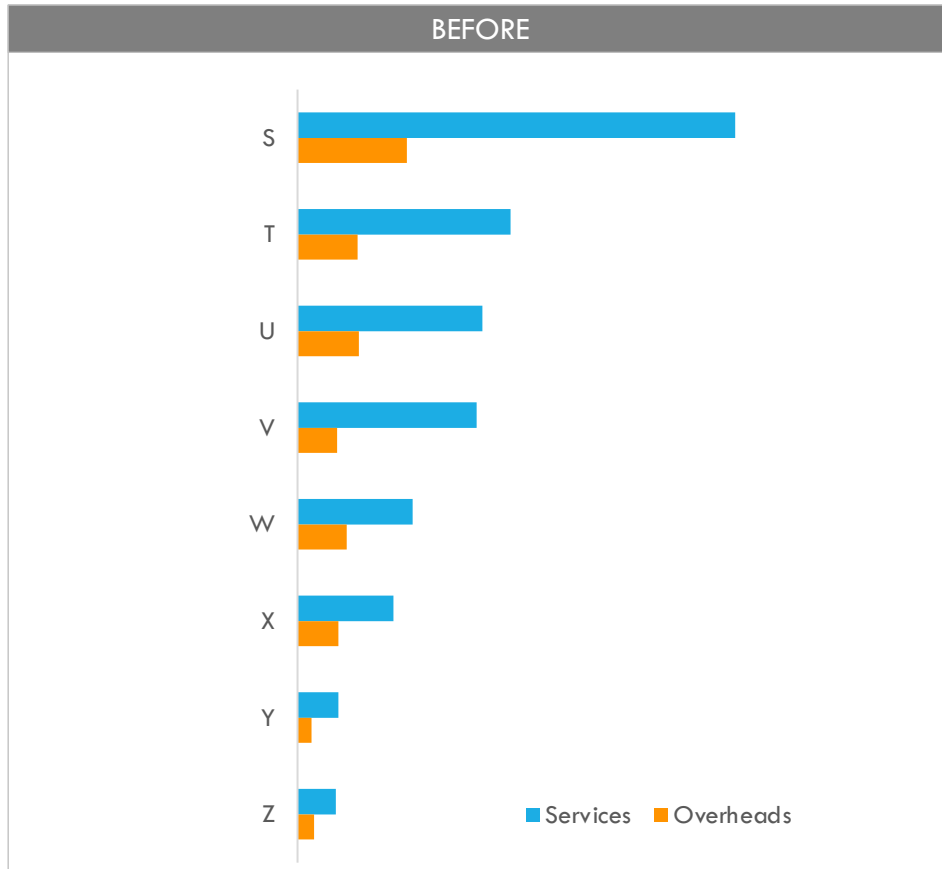
- Transition to a shared services model may create short term costs
- Need to develop a centralised model (to reduce costs) while maintaining regional offices and representation may limit savings (relative to geographically concentrated regions)

* https://en.wikipedia.org/wiki/Dutch_disease

A WA Peak Industry Body would target improved services through reduced overheads driven by shared services

SIMPLIFIED 'TOY MODEL' – WA FOOD INDUSTRY SHARED SERVICES PEAK BODY

STRAWMAN
TREAT AS CONCEPTUAL/DIRECTIONAL



Peak Industry Body concept was broadly supported by industry, but some thought obtaining any agreement would be a challenge

“A peak of peaks makes sense. Their members can be the heads of the industry groups in WA. They can then have a voice that covers all of the F&B sectors.”

“A peak organisation can take all the jobs the industry bodies have in common. In particular when it relates to small firms and their queries. The small firms cost 3x more than the large firms. They need so much more help.”

“A peak umbrella group must have a clear purpose and mission. It must be a strong voice to government, keep the industry up to date with industry wide issues and promote all firms in WA.”

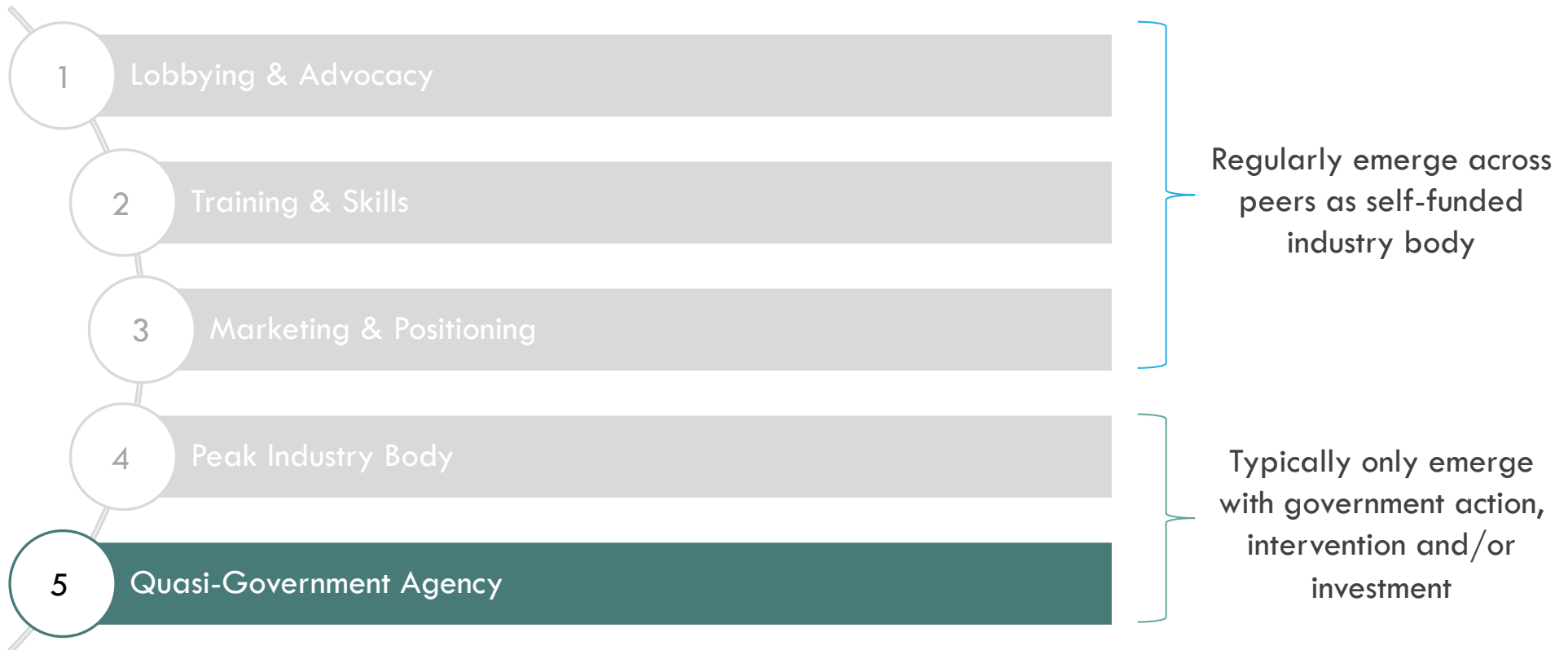
“I think there is room for a peak umbrella organisation and a lobby organisation with key members from across businesses on the exec.”

“The challenge with a peak industry body is that WA is so fragmented and highly competitive. Never the twain shall meet on many topics. Even the pastoralists and the arable farmers can't agree on things.”

“There is not much of an overlap between lobsters and lupins.”

“I imagine like any peak umbrella industry body it would be difficult to get agreement across the sectors.”

Finally, a model ‘Quasi-Government Agency’ organisation for Western Australian food and beverage manufacturers is developed



FOOD & DRINK WESTERN AUSTRALIA (FDWA OR FOOD WA)

WHAT IS THE CONCEPT?

Food and Drink Western Australia's purpose is to grow, promote and enhance the reputation of the Western Australian food and drink industry. Western Australia has created a world class body which facilitates and enables government and industry to work side by side.

GIVE ME THE ELEVATOR PITCH

We are here to nurture, support and champion the people and products of WA's food and drink industry to help deliver continued and growing success. We are here to guide our members to realise untapped potential, to unlock new markets and maximise opportunities. And we are committed to strengthening reputations, developing growth strategies and broadening networks to deliver the competitive edge WA.

WHAT MIGHT THE OPERATING & FUNDING STRUCTURE LOOK LIKE?

HOW MANY STAFF WOULD BE EMPLOYED?	10-20 (or more depending on role)	
HOW MANY BOARD MEMBERS?	12 (advisory board)	
HOW MANY MEMBERS WOULD THE ORGANISATION LIKELY HAVE?	400+	
WHAT TYPES OF MEMBERSHIPS WOULD EXIST?	Processor Producer Hospitality	Organisations Retailers Affiliate
WHAT WOULD BE THE AVERAGE FEES PER MEMBER?	No fees or ~\$1,000 (?)	
WHAT OTHER REVENUE STREAMS WOULD EXIST?	Government department Sponsorships	

WHAT RESOURCES & PUBLICATIONS WOULD BE PRODUCED?

- FDWA Newsletter
- FDWA Industry Directory & Referral Guide (FoodConnectionWA)
- WA F&B Industry Annual Review
- WA F&B Ambition 2030 Export Strategy & progress reports
- WA F&B Sector Strategies
- FDWA Jobs Board & Job Fairs
- FDWA Industry Toolkits
- Members only market research
- Social media (Facebook, LinkedIn, Twitter, YouTube, Instagram)

WHAT ACTIVITIES & SERVICES WOULD BE DELIVERED?

- WA Food Industry Summit
- Industry training support
- Industry employment promotion
- Advice and mentoring
- Networking and events
- Members only message board
- Webinars
- WAF&B Excellence Awards
- FDWA Knowledge Bank insights
- Access to food innovation centres
- Various grant schemes
- Trade events
- Industry cluster support

WHAT ARE THE BEST PRACTICE GLOBAL MODELS?



How could it happen? How could it come together?

STRAWMAN FOR DISCUSSION

VISION: Food & Drink Western Australian (FDWA) focuses on delivering world class services supporting economic growth to the state's agrifood industry.

1

DPIRD pushes a wide range of economic development activities into a separate arms length organisation focused on driving growth of the WA food and beverage industry.

FDWA governed as a separate entity with its own board.

With stable, long-term funding.

2

Experienced management is attracted to FDWA from a similar global leader.

FDWA creates a membership structure that makes a compelling offer to regional firms.

FDWA takes a clear leadership role in setting the industry strategy while driving the government's agenda.

3

Western Australia develops a coherent food and beverage industry story or message that is shared by most stakeholders.

Improved synergies emerge from existing disparate activities due to better coordination.

WA agrifood grows faster than other states.

What is the concept?

“We are the industry leadership organisation tasked with driving responsible growth for the sector and building Scotland’s global reputation as a Land of Food and Drink. We are led by the industry, supported by the Government and challenged to work across the whole industry.

We have two interlinked roles; we are a membership organisation with over 440 members at our heart and we lead the Scotland Food & Drink Partnership, a collaborative partnership of the key industry organisations and public sector agencies working in the industry in Scotland.

As the leader of the Scotland Food & Drink Partnership, we drive forward the industry strategy, *Ambition 2030*, which aims to double the value of the country’s farming, fishing, food and drink industry to £30 billion by 2030.

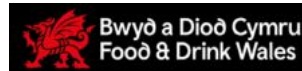
Led by the industry, supported by the Government and challenged to work across the whole industry, we bring everyone involved in the Scottish food and drink industry together to deliver a common and shared vision which will deliver greater success across the industry.

We are here to nurture, support and champion the people and products of Scotland’s food and drink industry to help deliver continued and growing success.” SF&D website

**SCOTLAND
FOOD & DRINK**

“We are the Welsh food and drink industry – and we’re proud of it! We are passionate about food and drink and work hard to support our producers and engage consumers in a way which embraces the environment and sustainability. Food and drink in Wales - we love our food in Wales. We love our industry! As the Welsh Government, we are committed not just to helping those working in the industry, but to telling the good news story to consumers in Wales and further afield. We’ve already made great strides in showcasing Welsh produce – as our increasing export record testifies.”

Food & Drink Wales website



“While Food South Australia is an independent and membership-based organisation and our members enjoy a range of benefits, we also receive funding support through a unique partnership with the Government of South Australia, managed through the Department for Trade and Investment, to provide programs and activities to support industry-wide growth. These industry-wide programs are developed by Food South Australia in line with the key pillars of our platform for industry growth.”



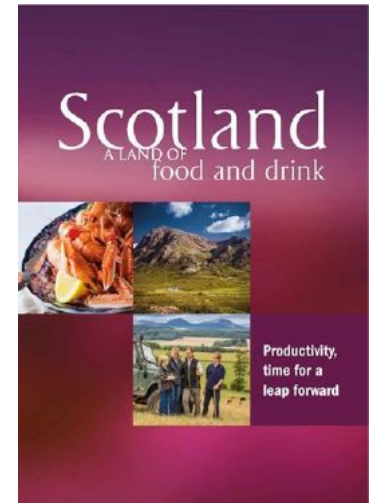
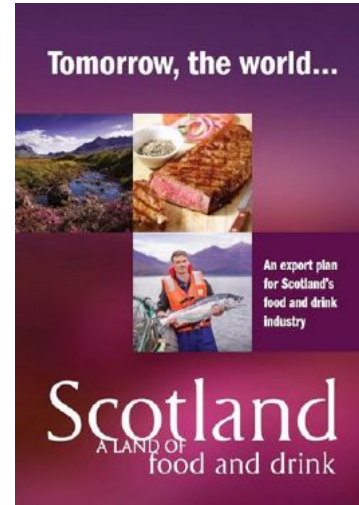
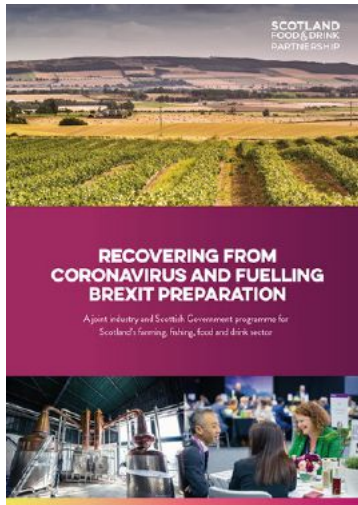
Where would the organisation deliver? Where would it focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

Primary role
 Secondary activity

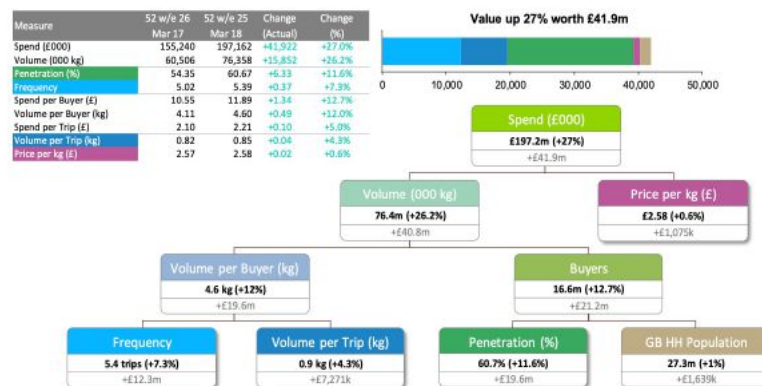
What would it deliver? Global peer groups deliver industry strategies, particularly those targeting government goals (e.g. net zero)



What would it deliver? Global peer group commission market research to support regional firms



Healthy Ice Cream has seen strong growth from 2017, with all metrics up on the year, particularly penetration and frequency



KANTAR WLRDPANEL

"Healthy Yoghurts" | Total GB | Measure Tree | 52 w/e 25th March 2018

What would it deliver? Global peer groups run annual industry conferences and summits



9.00AM WELCOME AND INTRODUCTION
MC - TANIA CAREY, GENERAL MANAGER, F&B
 In her position as General Manager of Food Processing Equipment, Tania is an associate friend and dynamic contributor to South Australia's food and beverage industry. We welcome Tania's return as our MC in 2022.

CATHERINE SAVER, CHIEF EXECUTIVE OFFICER, FOOD SOUTH AUSTRALIA
 Catherine leads Food South Australia's advocacy on behalf of the food and beverage industry, now more important than ever as industry stakeholders work together to navigate the COVID-19 recovery process and adapt to Tomorrow's New Normal.

9.10AM KEYNOTE ADDRESS: ADAPT
GUS BALBOVENI
 Starting in the late 90s and continuing for over a decade, broadcast and print media players have instilled a level of disruption and change that has not been seen since the industrial revolution. The food and beverage industry is rising through similar challenges right now. Our generation will focus on the adaptability required to cater to our ever-changing customer and understanding how we can easily forget the customer and focus our efforts on the business instead. These are lessons learnt over decades of market disruption and business transformation in a variety of industries. His topics are full of concrete steps and tips to implement immediately, providing simple but powerful concepts of change, adaptability, transformation, technology and innovation.

10.10AM THE SOUTH AUSTRALIAN PICTURE
COP MICHAEL, CHIEF INVESTMENT OFFICER, STATEWIDE SUPER
 As the world continues to emerge from COVID-19 in 2022 and economies begin to recover, we are likely to experience a period of higher interest rates and lower returns than we've seen over the past few years. When it comes to superannuation, this highlights the importance of continuing to focus on long-term returns, goals and strategies. Can we discuss the potential impact of this year's rate and Federal elections.

10.40AM MORNING TEA

11.00AM MANUFACTURING MARKETING
TS BEHNING, A TALENTED MANUFACTURING BUSINESS INTO A/1 ONLINE REBRANDER
TOBY STRONG, URBANBREW
 In 2016, Toby's business Probase was manufacturing and selling coffee pods, predominantly to Coles, Woolworths, and Costco and selling it via their e-commerce. Their highest costed packaging customer were incurring owing over a million dollars, which almost caused Probase to go bust. Since the crushing event, Toby has pivoted Probase's business model to become heavily focused on e-commerce and online marketing, which now accounts for 70% of sales. Sales and profitability have improved dramatically, and the business now has over 30 staff. Toby will share with you exactly how he's done it, covering all the highs and lows throughout his journey.

11.40AM SECURING YOUR FUTURE
TESSA BOWLES, SENIOR CONSULTANT, SECURITY & ASSURANCE, H&B
 With cyber criminals targeting Australians at unprecedented rates, understanding current fraud and scam threats has never been more important. In this session, H&B's security specialist, Tessa Bowles will provide a comprehensive overview of today's cyber security threat landscape. Tessa will explain the different ways in which criminals are targeting individuals and businesses, and provide practical advice on how you, and your business, can stay safe.

12.10PM EXPORTING EXCELLENCE
THE SOUTH AUSTRALIA FOOD AND BEVERAGE 5 YEAR EXPORT STRATEGY
 The South Australia Food and Beverage 5 Year Export Strategy sets the goal of increasing export sales from AU\$2.6 billion in 2021 to AU\$3.04 billion by 2027. This will be achieved through South Australian food and beverage businesses working together and supported by the state and Australian governments, overcoming the hurdles and maximising the digital opportunities identified in the strategy. Hear about how you can benefit and be part of this exciting future.

1.00PM LUNCH

2.00PM THE PACKAGING PARADOX
CHRISTOPHER CASSELL & CLAIRE WHEELER
 How can we meet consumer expectations on plastic without increasing food waste? In this session, ABC's Craig Newson joins Claire Wheeler from WRIAP Asia Pacific in conversation about the packaging paradox. Bring your questions for this exciting and interactive session with two experts in packaging and food discussing the challenges and opportunities for food businesses. Presented with support from Fight Food Waste CRC.

FIGHT FOOD WASTE
 Supporting Research Council

3.15PM TURBOCHARGE YOUR WORKFORCE
WILL BEING STRAIGHTER TO BOOST YOUR BUSINESS
DR TOM HATHWAY, DIRECTOR, HEALTHY MINDS
 Wellbeing is inextricably linked to work performance. When leaders are well, they lead well. When workers are well, they are more productive, efficient and engaged. The crucial question is what works when it comes to practical wellbeing initiatives? In this keynote presentation, Dr Tom Hathway will share specific insights and statistics from his award-winning Healthy Minds Program and the impact it is having on leading food, wine and consumer goods companies - locally and globally.

3.30PM AFTERNOON TEA

4.00PM TRENDY TRACTION
AUSTIN NEL, COMMERCIAL DIRECTOR, ANALYTICS & MEDIA, RETAILWORLDWIDE
 Consumer behaviour continues to change at a rapid pace. What has true prior to the pandemic might not be accurate - and might never be again. Austin's presentation looks at the trends we anticipate through 2022 and beyond, and will provide the key food and beverage insights you need to understand through shopper behaviour now and into the future.

5.00PM SUMMIT NETWORKING DRINKS

*The Food South Australia Summit Program may be subject to change.

THANK YOU TO FOOD SOUTH AUSTRALIA SPONSORS

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Supporting

Media **Press**

The Food South Australia Summit is presented and supported by

www.foodsouthaustralia.com.au

#FoodSASummit

Can the state support a quasi-government 'Food WA'-type industry organisation? What you would need to believe

WILL THIS MODEL WORK IN WA: WHAT YOU WOULD NEED TO BELIEVE

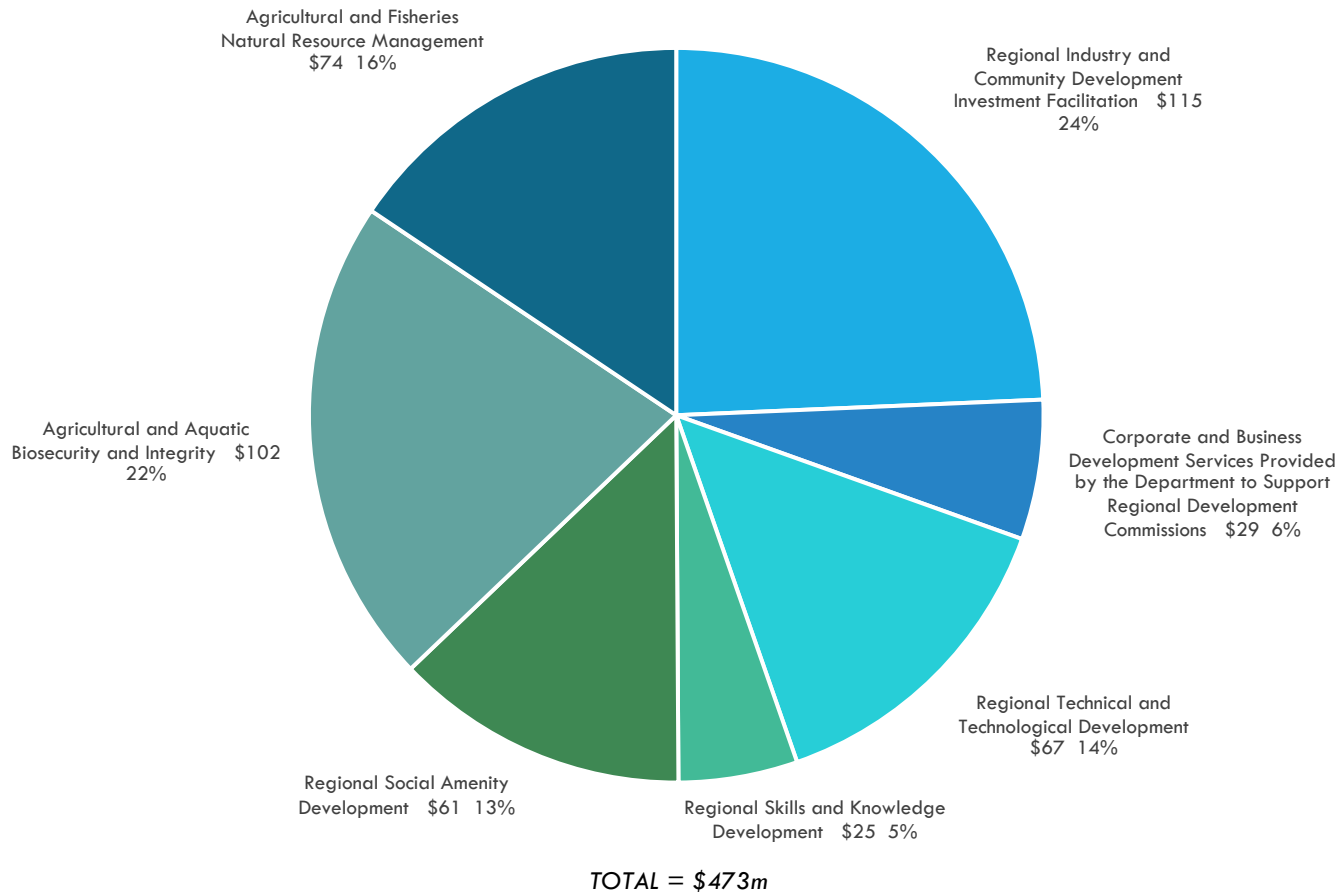
An organisation could be developed that would...	Elements of the WA context that support this	Potential challenges in the WA context...
1) Fulfil a real industry need	<ul style="list-style-type: none"> - DPIRD and numerous other WA government and quasi-government agencies already fulfil numerous industry organisation roles - In some sense this approach would be bringing together existing activities under a single brand umbrella with stronger governance - Numerous interviewees articulated that conceptually there was a need for an organisation playing this role in WA 	<ul style="list-style-type: none"> - Need to ensure that identified food industry needs stay relevant; lack of market forces or constrained revenues can lead to drift from "need to have" to "nice to have" to "still doing it for some reason" - World class models serve much larger industries and have major budgets (e.g. Ireland's Bord Bia with a budget of A\$112m*) - Need for coherent, independent governance may conflict with fragmented, piecemeal nature of political activity in WA
2) Serve a large industry	<ul style="list-style-type: none"> - WA is a major producer of a wide range of food ingredients suitable for transformation into consumer products - Potentially 17,000 target businesses that could be served by a 'food' agency; WA has over 13,000 farming businesses, over 1,000 fishing businesses, over 1,000 F&B manufacturers, over 1,300 agriculture/food-related wholesalers and 90 produce packhouses - F&B manufacturing a long term growth platform for the state 	<ul style="list-style-type: none"> - Scope creep is a real possibility; suggest a need to focus on value adding activities beyond the farmgate - Industry is large, spread out, fragmented and primarily made up of small firms; cost-to-serve will be high as a result - An area the size of Western Europe with the population of Jamaica - Spread out nature of WA agrifood landscape may push against centralisation in places
3) Address a coherent industry	<ul style="list-style-type: none"> - Firms across the wider agrifood value chain have common needs and issues - WA producers and consumers have a strong regional identity - COVID has underlined the critical importance and interconnected nature of the modern food chain and highlighted local supply 	<ul style="list-style-type: none"> - Need to balance and juggle multiple competing interests and industry segments - Many firms see themselves as sector firms (e.g. wine not food & beverages) and may be better served by sector solutions - Clear tension between casting a wide net (to give total coverage) and having a coherent agenda (e.g. distilling vs. fishing)
4) Provide valued roles and services	<ul style="list-style-type: none"> - No major issues or challenges identified with existing roles - New roles would be in line with global best practice 	<ul style="list-style-type: none"> - Significant potential for duplication of roles with existing providers - Restructuring required to "hive off" parts of DPIRD (and others?) into a new organisation may distract and disrupt team
5) Develop a robust funding model	<ul style="list-style-type: none"> - Funded primarily by taxpayer 	<ul style="list-style-type: none"> - Model relies on goodwill of politicians across multiple election cycles - Current state of play is numerous existing programs funded by numerous existing funding streams on differing timelines put in place by past commitments; may be difficult to untangle

* <https://www.bordbia.ie/globalassets/bordbia.ie/about/governance/annual-reports-pdfs/bord-bia-annual-report-2020.pdf> (page 116)

A new 'FOOD WA' quasi-government organisation would likely involve a spin-off of parts of DPIRD into a new brand or organisation

DPIRD COST OF SERVICES BY DEFINED SERVICE TYPE FY 2021

CONCEPTUAL/DIRECTIONAL



A new 'FOOD WA'-type spin-off daughter organisation*
~\$10-20m in costs/services

Primarily from Industry and Economic Development

- Potentially including roles under:
- Agribusiness, Food and Trade
 - Regional Business Development
 - Investment Management
 - Others

* This could just be a branding exercise under the existing structure (see Business Wales/Welsh Food & Drink); Source: DPIRD Annual Report (p87-88); Coriolis analysis

The Quasi-Government Agency was supported by industry...

"More important than lobbying for small firms, is support. Finding ways to reduce their high costs. The high costs is such a problem. Providing grants, access to capital, access to labour."

"An organisation that provides shared facilities would be great. It's so expensive for firms to invest in equipment and staff. It has to be at the right price and the right place."

"Government needs to see that food manufacturing is important for food security. But more than that it supports the farmers and rural economies plus there is a large labour force in the factories and processing facilities. It's good for all political groups."

"North Melbourne Food Group is a successful group, could they be a template for WA. Could they set up another branch in WA? Small businesses are part of this network, and we pay \$10,000/year to be a member."

"The Food Industry needs the ability to talk to WA Government. There is a role in creating a viable food industry. They could invest in grants and promotions. The Queensland government has an Investment Attraction group that will give you \$300m to set up a factory. The incentives are huge. WA has no benefits or grants (well substantial grants)."

"When Jeff Kennett was the Premier he really supported the VIC food industry. He gave them a lot of money."

"Most firms see Food Associations as the role of government. Need to show some successes then the money will follow."

...

“Small and medium firms have no idea how to add value. They have a lot of interest but don’t know how to do it, in terms of a business plan, strategy, markets and channels, costs of production etc. They need help. A cluster is logical where they can get help in the same place in a hub or cluster. This needs to be supported by government.”

“An Industry Group would go hand and glove with the Peel Food Precinct. If they get discounted use of the facility they have to join the organisation and this would fund the other advocacy activity. It would take a holistic view of the needs of all Food and Beverage firms. It also needs committed funding from government. Once firms got successes more would want to join to get the advantages.”

“Being involved in WA activities like at Gulf Foods is a great activity. Having direct access to markets and buyers. This is a great role for a government agency. All the the trade and promotion activity is government work.”

“Small firms need help initially, so their fees are lower, then when they get bigger they can contribute more and use additional functions and services which are fee for service.”

“DPIRD do a lot of the roles to support the food industry, networking, events, programs, some grants.”

DOCUMENT STRUCTURE / AGENDA

KEY QUESTION

What problem are we trying to solve?

Do we need an industry organisation focused on WA food and beverage manufacturing?

What are our options for an industry organisation focused on WA food and beverage manufacturing?

DETAILS/SUB-QUESTIONS

- What is the WA context for this project? (e.g. diverse, geographically spread out, majority small and medium size enterprises)
- Is there a 'gap in the market' in WA identified through this stocktake?
- Why have past organisations failed? What are the critical factors of success?
- Is there sufficient appetite from industry in WA to drive and fund a [potentially new*] representative group with sufficient shared interests?
- How can WA action these findings to establish (or reframe) a WA food and beverage manufacturing industry group, including funding requirements, governance/structure, and critical factors of success?
- What are the details of proven, successful global models adapted to fit with the WA context of diverse, geographically spread out, majority small and medium size enterprise? What is a clear framework for WA to follow based on these models? How can new models either fill the gap in the market (or assist existing organisations) to better support the WA food and beverage manufacturing sector?
- What are the short, medium, and long-term funding structures of the identified models?
- Is there a role for government? If so, what level of support would be required and for what term to establish a sustainable business model?

APPENDIX I – GLOBAL MODELS
What does best practice look like?

- What proven, successful global models of industry groups - that fit with the WA context of diverse, geographically spread out, majority small and medium size enterprises - exist?

APPENDIX II – WA STOCKTAKE
What do we have currently?

- What agrifood industry groups (including quasi-government agencies, formal and informal arrangements) are currently operating in WA? Who and where do they represent? What is their funding model? What services do they provide? What is their role or function?

APPENDIX III: PAST WA GROUPS
What have we had before?

- What agrifood industry groups (including quasi-government agencies, formal and informal arrangements) are currently operating or have operated in WA?

Proposed models need to fit with the Western Australian context and situation

KEY CHALLENGES FACING THE WA F&B SECTOR



* Therefore with modern environmental, regulatory and labour standards leading to high costs relative to many developing countries; Photo credits: purchased or CC BY-SA 3.0 (Reise-Line)

Canada, the UK, the USA and Eastern Australia were identified as having strong parallels; regions within these countries were screened for models

PEER COUNTRIES & REGIONS WITH STRONG PARALLELS TO WA SITUATION

	1. CANADA							2. UNITED KINGDOM			3. UNITED STATES	4. EASTERN AUST.
	British Columbia	Alberta	Saskatchewan	Manitoba	Ontario	Quebec	Atlantic Canada	Regional England	Wales	Scotland		
Currently overweighted to commodity ingredients	◐	●	●	●	◐	◐	●	○	◐	◐	◐	●
With a diverse range of emerging products	●	●	◐	◐	●	●	◐	●	●	●	●	●
Majority small and medium enterprises	●	●	●	●	◐	◐	●	●	●	●	◐	●
Geographically spread out	●	●	●	●	●	●	●	◐	◐	◐	●	●
Limited local/regional market	◐	◐	●	●	○	○	●	◐	●	●	◐	◐
A state of strong regions (not a national market)	●	●	●	●	●	●	●	●	●	●	●	●
Modern, developed economy	●	●	●	●	●	●	●	●	●	●	●	●
High productivity, high wage workforce	●	●	●	●	●	●	●	●	●	●	●	●
OVERALL	◐	●	●	●	◐	◐	◐	◐	◐	◐	◐	●

APPENDIX STRUCTURE

I. Canada

1. British Columbia
2. Alberta
3. Manitoba
4. Ontario
5. Quebec
6. Atlantic Canada

II. United Kingdom

1. English Regions
2. Wales
3. Scotland

III. United States

1. California
2. Pacific Northwest
3. Midwest
4. Southeast
5. New Jersey

IV. Australia

1. Queensland
2. South Australia
3. Victoria

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3. Scotland



BRITISH COLUMBIA

“Food and Beverage manufacturing and processing is now the largest component of British Columbia’s manufacturing industry... There are over 2,500 food processing companies in B.C. producing value added meat, seafood, dairy, fruit and vegetable products, wine, beer, soft drinks, sauces and condiments, functional foods and bakery items. Most wine production is located near the grape producing areas of the Okanagan with the highest concentration of wineries in Oliver, B.C. Seafood processing plants are found on Vancouver Island and the south coastal region. The highest concentration of baked goods and beer processing plants are in Vancouver, and fruit, berry, and poultry processing is located primarily in Abbotsford.

B.C.’s food and beverage processors produce approximately \$9 Billion worth of food per year representing 70% of total agrifood revenues. Over 30,000 British Columbians are employed in the food and beverage processing industries. Food processing firms are attracted to B.C.’s shipping infrastructure, dense composition of small flexible enterprises, effective food safety and environmental regulations, geographic location and favorable demographics. High demand for skilled labour, industrial land and local raw materials are ongoing challenges.”



BC Food & Beverage is a membership organisation that focuses on food processors in British Columbia, Canada



DETAILS

NAME	BC Food & Beverage
ADDRESS	Unit 310 - 9440 202nd Street Langley British Columbia V1M 4A6 CANADA
PHONE	+1 604 371-4245
EMAIL	info@bcfb.ca
WEBSITE	https://www.bcfb.ca/ https://bcfoodconnection.ca https://www.foodprobc.com
# OF STAFF	7
# OF BOARD	13
# OF MEMBERS	Not disclosed
FOUNDED	2004
COVERAGE	Food and beverage manufacturing

RESOURCES/PUBLICATIONS

- BCFB Learning Centre
- Publish Cultivate Magazine
- Export Guide
- Newsletter
- Blog
- Referral guide (BC Food Connection)

FUNDING MODEL/INCOME STREAMS

- Not for profit
- Membership fees
- Conference admission
- Conference sponsors

MEMBERSHIP FEES/CHARGES

Processor Member
 C\$250 - 1-5 Employees
 C\$600 - 6-25 Employees
 C\$1,250 - 26-99 Employees
 C\$1,600 – 100+ Employees
 Associate Member
 C\$375 - 1 Employees
 C\$715 - 2-25 Employees
 C\$1,430 - 26-99 Employees
 C\$1,760 – 100+ Employees

PROFILE

BC Food & Beverage (BCFB) is dedicated to representing food, beverage and natural health product manufacturers by providing resources for business growth. BCFB is a not-for-profit organization dedicated to represent all segments of the food, beverage and nutraceutical processing industry, and to coordinate common industry activities and resources under one umbrella. The Association represents micro, small, medium, and large processing companies.

MISSION

Our Vision is to ensure a thriving, world class food & beverage industry for British Columbia. We know that when each of us are acknowledged, included, elevated, and supported we achieve this world class status, and we all lead this!

Our Purpose: To be a catalyst of success for our members and the food & beverage industry in British Columbia. We lead, inspire and support, and we never stop moving forward.

ACTIVITIES/SERVICES

- Advocacy
- Industry Conference (FoodPro Thrive Conference)
- Webinars, Executive Roundtable and Regional Meetups
- Virtual Export Summit and Trade Show
- BCFB Awards
- Product of the Year Competition
- Ask an Expert 1:1 meetings
- Negotiate member discounts
- Job listings

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING/SITE VISITS	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT REQUIRE A LEVY (OR SIMILAR)

GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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How do they see their role? What do they do?

“The BCFB is a not-for-profit organization dedicated to representing all segments of the food, beverage and natural health products industry. Our purpose is to help our industry achieve economic prosperity and sustainable safe production in a balanced BC food industry.

For the government, we serve as a strong and unified point of contact with the industry and partner to help address industry issues.

For our members, we provide support, training, fellowship and a strong voice; to help empower them to provide the public with good food, innovative nutrition solutions and sustainable economic benefits for communities.

For the public, we provide policy advice and education.”
BCFB LinkedIn page

“BC Food & Beverage is a strong voice for the food, beverage, and NHP processing industry, Networking and sharing of best practices through committee and peer group meetings., Business opportunities, Risk management, Energy Manager Program, Group Benefits, and Mentorship Program.” BCFB LinkedIn page

“We should have joined as BCFB members a year ago, when we initially heard about it. Now that we are members, it’s been one of the best sources of information and from almost every event we come away with so much value and connections. We’re super happy we’re a part of BC Food & Beverage. We’re super pleased with being a BCFB member.”
Marc Wandler, Susgrainable (quoted on BCFB website)

“As a newbie to the CPG and food manufacturing world, the BCFB community has been such an incredible resource from everything from sourcing equipment to shipping to hiring. I am so grateful to be part of such a supportive and generous community. Every BC-based food startup should be a member!”
Aki Kaltenbach, Founder & CEO of Save Da Sea Foods
(quoted on BCFB website)

What are some good ideas from this organisation?

1

DELIVER A CONSTANT STREAM OF **EVENTS**

- Regional Meetups
- Foodpro Thrive Conference
- BCFB Awards
- Women in Food & Beverage Signature Series
- Emerging Business Series
- Executive Roundtable
- Monthly Webinar Series, speakers that matter to you.
- 2022 Virtual Export Summit and Trade Show

2

OFFER A **REFERRAL** **GUIDE** TO ENCOURAGE CONNECTIONS

“Like salt and pepper, some partnerships were meant to be. That’s the spirit behind our new initiative at BCFoodConnection.ca where we help bring members together with complimentary needs or services.

Our new search enabled site helps pair up food manufacturers, processors, co-packers, re-packers, and commercial or commissary kitchens to be more successful together, while achieving overall growth as individual companies.

Saving time, effort and money, members can search for the perfect partner by profile and capacity.”

3

OFFER AN **ASK AN EXPERT** SERVICE

“Ask and Expert allows you the opportunity to connect with industry experts who can help grow your business.

Simply fill out the form, press send, and we will make the introduction!”

IDEA: BCFB runs annual industry awards



The 14th annual BC Food & Beverage Awards – held virtually for the second year – showcased some of the best of BC including products, companies, and the people in the food and beverage space. From sourdough spaghetti to vegan gyozas, and rising entrepreneurs to longstanding industry leaders – this year's award winners were selected from the 168 nominations by a panel of judges. During this year's Awards Show – sponsored by FASKEN – 16 trophies were handed out, including the new Community Impact Award that went to Vancouver-based, Soul Bite Food.

With 65 years in business, Sunrise Soya Foods was this year's inductee into the BC Food & Beverage Hall of Fame.

'Gnubees+' by GnuSanté Creations wowed the judges at the Product of the Year pitch and took home the coveted Gold Award for Product of the Year. Followed by Kaslo Sourdough's 'Sourdough Spaghetti' winning Silver and Modern Meat's 'Modern Gyoza' securing Bronze.

BCFB Awards Show host, Fred Lee, kept the show fun and fresh for the third year in a row and chatted with special guests including Minister of Agriculture, Food and Fisheries Lana Popham.

2021 Award Winners

Product of the Year Gold: Gnubees+ by GnuSanté Creations

Product of the Year Silver: Sourdough Spaghetti by Kaslo Sourdough

Product of the Year Bronze: Modern Gyoza by Modern Meat

Innovation Award: Organika

Rising Star Award: Aki Kaltenbach, of Save Da Sea Foods

People First – Health, Safety & Culture Excellence Award: Golden Boy Foods

Best in Brand Award: SPUD.ca

Leadership Award: James Pratt, of Rhema Health Products

Export Award: Libre Naturals

Sustainability Award: Cascadia Seaweed

Community Impact Award: Soul Bite Food

Hall of Fame Inductee: Sunrise Soya Foods

Associate Member of the Year: DTEC

Processor Member of the Year: Long Table Distillery

Processor Member of the Year: Big Mountain Foods

Processor Member of the Year: Prairie Goodness

IDEA: BCFB runs an annual conference



ENERGIZED AND READY TO THRIVE >>>

Join us for a day of meaningful connection and shared experiences, inspirational speakers, chatting over lunch or an afternoon cocktail, laughter, networking and building community in ways that matter to you.

JANUARY 25 2022, PARQ HOTEL VANCOUVER

INSPIRING SPEAKERS.

- ARLENE DICKINSON
- MIKE FATA
- DIONNE LASLO-BAKER
- RATANA STEPHENS
- LORI JOYCE
- CHARLES CHANG
- JAKE KARLS
- PETER VAN STOLK
- JANA SOBEY

LEARN MORE

FOODPRO 22

THRIVE CONFERENCE BY BC FOOD & BEVERAGE.

Imagine TEDx style talks with a Food & Beverage twist with hundreds of your industry peers. A day of meaningful connection and shared experiences, inspirational speakers, chatting over lunch or an afternoon cocktail, laughter, networking and building community in ways that matter to you. Join us for Foodpro22.

June 9th 2022, Parq Hotel, Vancouver

REGISTER

Ticket Name	Sale Ends	Price	Quantity
EXCLUSIVE BCFB PROCESSOR MEMBER TICKET - limited quantity available at this rate - ticket includes: Access to a day of engaging speakers, refreshments, lunch, a cocktail reception (one drink included)	09 Nov 2021	\$99.00	Sale Ended
BCFB Member (Associate & Processor) - Ticket includes: Access to a day of engaging speakers, refreshments, lunch, a cocktail reception (one drink included)	01 Jun 2022	\$139.00	Members Only Sold Out
Non BCFB Members - Ticket includes: Access to a day of engaging speakers, refreshments, lunch, a cocktail reception (one drink included)	01 Jun 2022	\$199.00	Sold Out

IDEA: BCFB runs a free online connection service for industry participants



St. Jean's Cannery Ltd.

St. Jean's
www.stjeans.com

Email Address
[REDACTED]

Physical Address
242 Southside Drive, Nanaimo, V9R 6Z5

Website
<https://www.stjeans.com/>

LinkedIn Profile
<https://www.linkedin.com/company/st-jean%27s-cannery-&-smokehouse/>

Phone Number
+12507542185

Detailed Description
Canning, smoking, rearing, hot fill, vacuum packing

The types of services offered.

Co-packer Processor with Extra Capacity

Industry categories

Animal & Pet Feed Condiments & Sauces
 Seasoning-Dry mixes Seafood
 Soups

Product categories

Dog and Cat Food Frozen Food
 Seafood Products Condiments & sauces
(including smoking, salting and drying - fresh fish, fins, scales, bones and entrails; marine fats and oils; and freezing)
 Jams and jellies Dips & Salad Dressings
 Soups

Packaging categories

Bottles Cans
 Jars Retort Pouches
 Shrink & flow Wrapping Boxes
 Vacuum Bags Flexible Pouches

Minimum volume & frequency runs per month (kilo- litres).
< 500

Certification categories

HACCP KOSHER
 US Food & Drug Admin

Are you willing to work with low minimum clients?
 Yes

Are you a cfsa federally registered facility?
 Yes

Is your facility qualified to manufacture products destined for sale outside of bc?

Alberta Manitoba
 Saskatchewan Ontario
 Quebec New Brunswick
 Nova Scotia Prince Edward Island
 Newfoundland and Labrador Yukon
 Northwest Territories Nunavut

is your facility qualified to manufacture products destined for sale outside of Canada?
 Asia United States

Do you offer additional services?

New product development Recipe development
(Commercial scale)
 Thermal process Shelf life testing (either in house or using a third party)

Approximate Location

IDEA: BCFB publishes a magazine



IDEA: BCFB has an 'Ask An Expert' program for members



Ask an Expert allows you the opportunity to connect with industry experts who can help grow your business. Simply fill out the form, press send, and we will make the introduction!
Take advantage of this great BC Food & Beverage member benefit.

Learn more about your experts

- Air Products
- BFL Canada Insurance Services Inc.
- Business Development Bank of Canada (BDC)
- Cambridge Global Payments
- Canadian Alliance Terminals Inc.
- Canadian Artisan Foods
- ColdStar Solutions Inc
- Crew Food & Beverage Marketing Partners
- DTEC (Intersect Business Systems Inc)
- Enginuity Engineering Consulting Ltd.
- Export Development Canada
- Fasken
- FCC
- Great Little Box Company/ Ideon Packaging
- Handmann Canada Limited
- HR West Consulting
- Icicle Technologies Inc.
- Incrementa (un)consulting
- Kaizen Institute Canada (BC) Ltd
- Knack Industrial Contracting

- Laporte Engineering Inc
- Lyne Systems
- MNP LLP
- multivac
- Nielsen Company
- PCB Customs Brokers
- PIVOT AND PILOT CREATIVE INC
- Rain City Industrial Workspaces
- Raven Hydronic Supply LTD
- Reiser Canada Co
- Reliance Insurance Agencies
- Roynat Equity Partners
- SGS Canada Inc
- Summit Labels
- TD Bank
- The Canadian Workplace Culture Index
- TLC Solutions
- Tricorbraun Vancouver
- Vancouver Premium Packaging Ltd.
- Vision33 Inc.
- Wellgenex Sciences Inc.

Subject Block *

choose one

Name *

First Last

Email *

Phone *

Company *

What is your question? *

Maximum 250 words

SUBMIT

APPENDIX STRUCTURE

- I. Canada
 - 1. British Columbia
 - 2. Alberta
 - 3. Manitoba
 - 4. Ontario
 - 5. Quebec
 - 6. Atlantic Canada
- II. United Kingdom
 - 1. English Regions
 - 2. Wales
 - 3. Scotland



ALBERTA

"Food and Beverage Manufacturing Sales – 2017

In 2017, food and beverage manufacturing represented the second largest manufacturing industry in Alberta (20.3 per cent of total manufacturing sales), after petroleum and coal product manufacturing (22.4 per cent).

Food and beverage manufacturing sales reached a record \$14.4 billion in 2017 which is up 8.4 per cent from 2016. This marked the fourth consecutive annual gain. While food manufacturing sales jumped 11.1 per cent to \$13.3 billion, beverage manufacturing declined 16.9 per cent to \$1.1 billion. Contributing to the increased food manufacturing

sales were meat products, including poultry (up 9.3 per cent, to \$7.4 billion), dairy products (up 50.7 per cent, to \$1.2 billion), and grain and oilseed milling (up 1.9 per cent, to \$1.7 billion).

Alberta's meat products, including poultry, continued to be the largest food segment in the province, representing 55.2 per cent of total food manufacturing sales in 2017, as well as 25.6 per cent of total Canadian meat products (\$28.7 billion)."



AFPA is a membership organisation that focuses on food processors in Alberta, Canada



RESOURCES/PUBLICATIONS

- Newsletter
- Industry Magazine (annual)
- Industry directory
- Classified ads on website

PROFILE

AFPA is a non-profit organization representing all segments of the \$15 billion food and beverage industry including growers, processors, retailers, foodservice buyers and suppliers; member of Canadian Council of Food Processors

DETAILS

NAME	Alberta Food Processors Association
ADDRESS	5123 Marian Road NE Calgary, Alberta T2A 2Y1 CANADA
PHONE	+1 403-201-3657
EMAIL	info@afpa.com
WEBSITE	https://afpa.com/
# OF STAFF	3
# OF BOARD	8
# OF MEMBERS	~800
FOUNDED	1974 (48 years old)
COVERAGE	Primarily food processors Claims to represent "growers, processors, retailers, foodservice buyers and suppliers"

FUNDING MODEL/INCOME STREAMS

- Non-profit
- Membership fees
- Classified ads
- Newsletter & magazine advertising

MISSION

Our mission is to build the competitive advantage of our members through quality training, effective promotion and by being the representative voice of members and the Alberta food processing industry.

MEMBERSHIP FEES/CHARGES

Processors (based on # of emp in Alberta):
 \$350 - under 5 employees;
 \$550 - 6-25 employees;
 \$1,200 - 26-100 employees
 \$1,700 - 100+ employees.

Associate (service provider) (based on number of total emp for company):
 \$350 - under 5 employees
 \$775 for all others.

ACTIVITIES/SERVICES

- Industry training courses (food safety & quality, workplace safety, customized training)
- Consulting services (e.g. improving an existing HACCP program)
- Quality standards auditing services (e.g. GAP)
- HACCP mentoring
- Partnership with Express Trading Canada (www.expresstradingcanada.com) to support export growth
- Meet to buyer tradeshow
- Negotiation of membership discounts (e.g. insurance, first aid training)
- "a collective voice to address key industry issues"

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT REQUIRE A LEVY (OR SIMILAR)

GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	AWARDING R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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How do they see their role? What do they do?

“As the Alberta Food Processors Association moved into our 48th year representing Alberta’s food processing sector, I know this association is the perfect hub to distribute information and represent our member’s needs – now and into the future. AFPA knows and understands the heartbeat of our industry, and we bring what is needed to partner together to ensure success for your company.”

Eric Haak, AFPA Chair, 2021

“While we recognise the importance of looking to the past, AFPA understands that our changed world means we must always be looking forward. What is needed? How can we best assist our members in their efforts to navigate our ever-changing industry? I am excited to say a new future awaits for AFPA and for our members. When government support ran out, we adapted and we’re thrilled by the support our members have shown about the direction we’re going. The last few years have been challenging, but AFPA is ready for the future and enthusiastic about helping our members traverse the landscape.”

Eric Haak, AFPA Chair, 2021

“As board chair, my focus, and that of our board, will be to initiate discussions with key leaders within our industry. At the senior government level, it will be to articulate a vision for our industry to the year 2025. Our success will depend on your involvement and support. You will be hearing more about our vision looking forward to the year 2025 and the measurable ways this will grow the economic potential of the sector as a whole.” Eric Haak, AFPA Chair, 2019

What are some good ideas from this organisation?

1

OFFER A RANGE OF
PUBLICATIONS
WITH PAID
ADVERTISING

- Annual colour glossy magazine (AFPA in Action)*
- Monthly newsletter
- Membership directory
- Classified website ads

2

DELIVER A RANGE OF
WORKPLACE & FOOD
SAFETY **TRAINING**
COURSES

For Example:

- OH&S System Building
- OHS Roles & Responsibilities for Managers/Supervisor
- Hazard Assessment
- Incident & Accident Investigation
- Auditor & Auditor Recertification
- HS Committee/Rep Technical Rules
- GMP, Preventive Controls & HACCP Implementation
- FSPCA FSVP Foreign Supplier Verification Program
- SQF Auditor

3

NEGOTIATE MEMBER
DISCOUNTS FROM
SERVICE PROVIDERS

- Insurance
- First air training
- Software

* Via specialise media firm focused on serving industry associations (<http://www.matrixgroupinc.net>)

IDEA: AFPA publish an annual magazine funded through advertising

AFPA IN ACTION
THE OFFICIAL MAGAZINE OF THE ALBERTA FOOD PROCESSORS ASSOCIATION

WINTER 2021-22

A New Training Era
Born out of the emerging needs of industry and the careful vision from AFPA members.

ALBERTA food processors association

PLEASE SHARE THIS MAGAZINE WITHIN YOUR ORGANIZATION.

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12 AFPA IN ACTION ●●● Alberta Food Processors Association

FIXING THE LABOUR PROBLEM: WHERE WILL WE FIND 35,000+ NEW WORKERS?

By Jennefer Griffith, Executive Director at Food Processing Skills Canada

Earlier this year, Food Processing Skills Canada released its latest labour market report, *At the Crossroad to Greatness — Key Insights & Labour Market Research About Canada's Food and Beverage Processing Industry*. We chose the title *At the Crossroad to Greatness* because we know the industry in Canada is ready to expand to meet increasing global food demand, but the labour challenge is severely constraining growth.

Our analysis showed that in 2020 the Canadian industry directly employed 280,000 people and had a critical labour shortage. For complete details on employment gaps download the report, but to summarize, we have also calculated that by 2025 the industry requires a minimum of 35,000 new people and at least 56,000 new people to achieve its potential.

Each job vacancy is costing businesses as much as \$190 per day in lost revenue. We learned from employers that they had an average of six vacant positions, which across the country totals a staggering average daily industry revenue loss of \$8.5 million per day or \$3.1 billion per year.

In Alberta, we know that there are 661 vacancies. Applying the same assumptions leads us to 3,846 vacancies which is costing the sector \$730,740 per day or approximately \$267 million per year. That's a big number that if not addressed will impact growth of Alberta's food and beverage processing businesses.

However, with 91% of the 7,600 businesses across the Canadian industry employing less than 100 people, making the important upgrades to workplace culture, continuous learning and recruitment and retention strategies can be difficult. Even before COVID-19, businesses were pushed to the limit and profit margins lean.

During the COVID-19 global pandemic, the labour market is further proving to be extremely tight. We have learned that the biggest challenge

for employers is accessing a pool of qualified candidates with 68% of employers facing recruitment and retention challenges. With only one in four Canadians familiar with the food and beverage processing industry, it is easy to see that the industry has to raise its profile and focus on talent attraction.

Over the years, Food Processing Skills Canada has developed a number of workforce programs and resources like the Canadian Food Processors Institute, Food Skills Library and FoodCart — all of which are easily accessible to employers. Our latest initiatives have also been designed to provide immediate support to businesses.

Succeeding at Work Employer is offering free, online training to employee teams to upgrade technical and social-emotional skills, particularly important when new people need coping tools for COVID-19 stressors.

Language Stream is translating proven e-courses into multiple languages to support newcomers and English as a second language employees in the workplace.

iFood 360° is introducing new virtual reality training at a time when physical distancing is impacting previous learning strategies that relied on facility classroom settings.

Student Work Placement Program+ is simplifying access to post-secondary students and providing wage subsidies of up to \$7500 for employers to attract new skills and future leaders.

Canadian Certified Industrial Meat Cutter Level 1 is raising the standards of the meat cutter profession by recognizing individuals for their skills and performance.

To learn more about Food Processing Skills Canada and how the organization can support Alberta businesses visit www.fpsc-tac.com or contact our team.

Food Processing Skills Canada is the Canadian food and beverage processing industry's workforce development non-profit organization located in Ottawa with regional representatives supporting businesses across the country.

Winter 2021-22 ●●● AFPA IN ACTION 13

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 - 2. Wales
 - 3. Scotland



MANITOBA

Highlights

- Food and beverage processing is the largest manufacturing sector in Manitoba, accounting for 32 per cent of Manitoba's total manufacturing sales in 2020.
- Total food and beverage manufacturing sales in 2020 were \$5.9 billion, sixteen per cent higher than the previous year.
- The sector directly employed 12,650 Manitobans in 2020 and is the largest manufacturing employer in the province.
- Exports of processed food and beverage products stood at \$3.31 billion in 2020, an increase of 16.4 per cent as compared to 2019. This accounts for 56 per cent of the total food and beverage manufacturing sales in 2020.

Overview

- Manitoba has a vibrant food processing sector with 740 establishments, of which 428 are provincially registered under Manitoba Agriculture and Resource Development. Three hundred and twelve are federally-inspected facilities.
- Manitoba's three largest food processing industries are meat product manufacturing, grain and oilseed milling, and dairy products manufacturing.
- Increasing global demand for healthy, local, organic and functional foods provides growth opportunity for Manitoba's food and beverage processing sector.
- Manitoba has a great potential to become a leader in North America in the growth of a protein-focused industry.



Food & Beverage Manitoba is a membership organisation that focuses on food processors in Manitoba, Canada

**FOOD &
BEVERAGE**
manitoba



DETAILS

NAME	Food & Beverage Manitoba*
ADDRESS	2-59 Scurfield Blvd Winnipeg, MB R3Y 1V2 CANADA
PHONE	+1 204-982-6372
EMAIL	info@foodbeveragemb.ca
WEBSITE	https://foodbeveragemb.ca
# OF STAFF	5
# OF BOARD	8
# OF MEMBERS	~300 (full and associate members)
FOUNDED	1993 (29 years)
COVERAGE	Food processors, distributors, packaging and equipment/facility construction

RESOURCES/PUBLICATIONS

- Membership directory
- List of industry resources (regional & national)
- Guide for new entrants to industry
- Directory of all industry relevant support programs (regional & national)
- Food industry career pathways guide

FUNDING MODEL/INCOME STREAMS

- Not for profit
- Membership fees
- Fees for training and courses

MEMBERSHIP FEES/CHARGES

Not on website

PROFILE

Food & Beverage Manitoba is an industry-led association dedicated to promoting our vibrant food and beverage industry, and ensuring our members have the resources, strength and conditions they need to succeed.

MISSION

Food & Beverage Manitoba is an industry-led, not-for-profit association that launched in 1993 to help Manitoba's food and beverage industry achieve its full creative and competitive potential. We do this by providing the expertise and resources our members need most: in developing new markets, training a skilled workforce, building human resource capacity, creating opportunities for networking and collaboration, and sharing critical information about domestic and international trade, industry regulations, and government programs.

ACTIVITIES/SERVICES

- Training & development
- Coaching and mentoring
- Human resources
- Employment opportunities
- Events & networking (including online webinars and forums)
- Market development / information sharing
- Use of "Manitoba Made" logo
- Industry Excellence Awards
- Membership directory
- Membership newsletter emails

* Formerly Manitoba Food Processors Association

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT REQUIRE A LEVY (OR SIMILAR)

GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	AWARDING R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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How do they see their role? What do they do?

“The ability to adapt quickly to change is critical to the success of Manitoba’s food and beverage industry. Our member companies are working hard to develop the new products, processes, and technologies they need to stay competitive. The demand for a skilled and fully-trained workforce has never been greater. Food & Beverage Manitoba offers a broad range of training programs and initiatives that are relevant, accessible and affordable to our members.

Following extensive consultation with our membership, Food & Beverage Manitoba has designed and organized training and development initiatives to meet the specific needs and requirements of our industry.”

F&BM website 2022

“Food & Beverage Manitoba’s human resources team provides our members with expert, one-on-one advice on everything from staffing to leadership training, ensuring your workforce is made up of the right people in the right jobs at the right time.”

F&BM website 2022

“We help companies of all shapes and sizes grow to their full potential in the marketplace. And it’s a marketplace we know — thanks to more than 20 years of experience delivering industry-wide programs and building relationships with partners in grocery and food service distribution channels... Our market development experts provide the one-on-one professional guidance our members need to effectively brand themselves, market and distribute their products, and increase sales.

One way we do this is by assessing new products and package design, providing opportunities for peer-to-peer mentoring and assistance in presentation skills...

Currently, we are working in cooperation with our training group to develop two new courses to help our members present themselves and their products to retailers and food service executives. Preparing members with a series of workshops and tours to educate members on what retail and food service buyers want from suppliers, positioning and pricing, promotional tactics, the sales pitch, kits and more.”

F&BM website 2022

What are some good ideas from this organisation?

1

OFFER A
BOOTCAMP FOR
NEW FOOD
VENTURES

- 12 week class
- Learn about Recipe Development, Nutrition Labelling, Food Packaging, Competitive Analysis and more.
- Get mentorship from like-minded entrepreneurs and experienced industry experts to untangle the complex details involved in the food industry such as food safety, distribution and marketing.

2

DELIVER A RANGE OF
TRAINING COURSES

For Example:

- Human Resource management
- Food HACCP Plan Development
- Advanced Food Safety training including GFSI schemes
- Business Development
- Sales/Presentation Skills
- Certified food handlers training
- Setting the table for Diversity and Inclusion workshop
- Restaurant to Recovery Program
- Grant Writing Made Easy
- Environmental, Social & Governance and Climate Change – An Overview

3

DELIVER A SERIES
OF **NETWORKING**
EVENTS FOR
MEMBERS

In addition to the networking opportunities at industry round-table discussions, training seminars and industry update meetings, we hold four annual premier events:

- Industry Day & Annual General Meeting
- Industry Excellence Awards
- Manitoba Made Golf Tournament
- Winter Holiday Reception

IDEA: Food & Beverage Manitoba manage the “Manitoba Made” brand



OUR BRANDS **Manitoba Made**

We're proud to say we promoted the idea of “buy local” long before it became a marketing trend. *Manitoba Made* is Food & Beverage Manitoba's trademarked logo. Now celebrating its 20th year, the Manitoba Made logo helps identify foods that were made right here in Manitoba and can be seen on many of the foods Manitobans purchase every day. Members benefit from the Manitoba Made brand by using it on their packages and labels to reach local

consumers who want to purchase products that are identified as being made in Manitoba.

OUR BRANDS **Manitoba Organic**

Our newest brand helps consumers find local, certified organic food grown and made in Manitoba. Full Food & Beverage Manitoba members who have **an up-to-date organic certification from a federally-accredited certification body can now use this logo** to identify their products. Contact us for more details.



IDEA: Food & Beverage Manitoba give out industry excellence awards



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ONTARIO

About the food and beverage processing industry

If you like eating, food and beverage processing is important. Ontario's 3,800+ processing businesses make a huge variety of food and drink. In fact, over 65% of the fresh product that comes from Ontario farms goes into processing facilities. Think about bread, frozen vegetables, packaged salads, sausages, beef, chicken, lasagnas, pizza, cookies, candies, alcoholic and non-alcoholic beverages – all these products and many more come from Ontario's processing sector.



“Ontario’s food and beverage processing sector is the largest in Canada – accounting for 37% of the industry’s revenue in the country.

The sector has more than 4,000 establishments in the province, employing over 125,000 people. More than 90% of its establishments employ fewer than 100 people and one quarter is located in rural communities. There are several aspects that provide the Ontario food and beverage processing industry with a competitive advantage, including a rich agricultural base, a large consumer base, an educated workforce, adequate infrastructure,

competitive costs, and a cluster of research and innovation opportunities in the sector.

The food and beverage manufacturing industry encompasses all companies involved in processing raw food materials, packaging and distributing them. This includes fresh, prepared foods as well as beverages and confectioneries.

All this is possible because Ontario has the perfect combination of fertile land, high population density and transportation hubs that allow for it to be a North American leader.”



Food & Beverage Ontario is a membership organisation that focuses on food processors in Ontario, the largest food producing region in Canada



DETAILS

NAME	Food and Beverage Ontario
ADDRESS	PO Box 429 Beamsville, ON L0R 1B0 CANADA
PHONE	+1 519 826 3741
EMAIL	N/A
WEBSITE	https://foodandbeverageontario.ca https://tasteyourfuture.ca https://frontlinefoodfacts.ca
# OF STAFF	3
# OF BOARD	16
# OF MEMBERS	N/A
FOUNDED	2003 (re-branded in 2014 from the Alliance of Ontario Food Processors)
COVERAGE	Members are processor businesses, agri-food associations, and supplier of services and products

RESOURCES/PUBLICATIONS

- Processors directors (members only)
- Members only industry forums
- Industry newsletter

FUNDING MODEL/INCOME STREAMS

- Membership fees
- Historical government funding and grants (e.g. Growing Forward 2)

MEMBERSHIP FEES/CHARGES

Member (processor)
C\$600/year – 20 or fewer employees
C\$3,000/year – 21 to 249 employees
C\$7,500/year – 250+ employees

Associate member (other stakeholder)
C\$1,500/year

PROFILE

WHO IS FOOD AND BEVERAGE ONTARIO?

Food and Beverage Ontario represents 70% of food and beverage processors across Ontario. A professional leadership organization with 17 years of industry experience, FBO was originally founded in 2003 as the Alliance of Ontario Food Processors. Contributing over \$42 billion every year, FBO is one of the leading employers across the province. FBO members are small to multi-national processor businesses located across Ontario. FBO also provides a category of engagement for industry associates. FBO associates include industry stakeholders and businesses that are affiliated or supportive of the Ontario food and beverage processing sector.

MISSION

Ultimately, Food and Beverage Ontario's objective is to promote and support a competitive Ontario industry, both locally and as part of the larger global marketplace.

ACTIVITIES/SERVICES

- Advocacy & engagement
- Annual conference (200+ participants)
- Annual golf tournament
- Other networking opportunities
- Online skills training (JV w/ Food Processing Skills Canada)

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
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GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	AWARDING R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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How do they see their role? What do they do?

“Our job at Food and Beverage Ontario is to ensure that consumers understand this province is home to leaders in food production from local processors through to globally-recognized multinationals. Our job is also to ensure that businesses remain competitive in regional and global economies that can change rapidly. To do this we build strong relationships with colleagues across from the food supply chain from agriculture to retail, and with governments that have a vested interest in our sector.

To be efficient and resource-smart for our members, we also partner with subject matter experts on top priority issues such as workforce development, innovation and automation, and regulations. You will find Food and Beverage Ontario representing the Ontario food and beverage processing industry on a number of government roundtables and presenting on issues to key decision-makers.

For our members, we also understand that networking and B2B opportunities are essential to success. Food and Beverage Ontario hosts an annual conference and golf tournament.”

Food and Beverage Ontario website

“The Ontario food and beverage processing industry is represented by FBO in a number of ways including Board positions with the Agricultural Management Institute, Agricultural Adaptation Council, President’s Council, Minister Leal’s Agri-Food Growth Steering Committee, Agricultural Research Institute of Ontario, Farm Products Marketing Commission, Open For Business and the Canadian Council of Food Processors.

FBO regularly meets with government and political officials to review items that have the potential to support or hinder industry’s competitiveness such as the proposed Ontario Retirement Pension Plan.

FBO is also a primary voice to governments on programs such as Growing Forward 2 for Processors and the Jobs and Prosperity Fund, in addition to collaborating with subject matter expert organizations such as Provision Coalition on industry sustainability issues.”

FBO Annual Review 2014-15

“Food and Beverage Ontario (FBO) is a not-for-profit, leadership organization dedicated to advancing the interests of Ontario’s food and beverage processors. Our focus is on the success, prosperity and growth of the food and beverage processing sector. We work collaboratively with colleagues across the agriculture and food sectors.”

Food and Beverage Ontario Annual Review 2019-20

What are some good ideas from this organisation?

1

PROMOTE EMPLOYMENT IN THE FOOD INDUSTRY

- Raise awareness and inform young people, students, new Canadians and second career individuals about jobs in the food and beverage processing industry.
- Develop networks to strengthen partnerships and collaborations across education and career pathways with industry employers, HR professionals, industry and special interest groups, guidance counsellors, colleges, universities and newcomer/settlement agencies.

2

OFFER **ONLINE SKILLS TRAINING** FOR JOBSEEKERS AND NEW HIRES

“Food and Beverage Ontario and Food Processing Skills Canada have partnered to deliver FREE, online skills training for jobseekers and new hires.”

“Participating is easy! Jobseekers and new hires simply register and follow the prompts to complete a total of 14 courses over 30 hours. Graduation certificates and transcripts are awarded!”

3

ORGANISE A SERIES OF **JOB FAIRS** TO ATTRACT STAFF

“To assist employers find qualified candidates immediately our program is delivering a new virtual job fair series designed to assist your organization in filling vacant positions with qualified candidates by making introductions to jobseekers seeking work in Ontario’s food and beverage processing industry.

At each job fair you will meet with enthusiastic, qualified jobseekers who are interested in working full-time and part-time, in addition to connecting with students and new graduates looking for placement opportunities such as internships and co-ops.”

IDEA: Food & Beverage Ontario has a six part strategy to address labour shortages in the food and beverage industry in the region



Solving workforce challenges

Prior to the COVID-19 global outbreak, the Canadian food and beverage processing industry was facing a serious gap in employment and skills.

Food and Beverage Ontario's commissioned report, *Labour Market Information for Ontario's Food and Beverage Processing Industry*, identified 20% of the Ontario workforce as retiring in the next ten years. Employers were grappling with the challenge of finding people to replace positions vacant due to retirement, and new people needed to meet industry growth.

To characterize the situation and initiate a dialogue on solutions, Food and Beverage Canada developed *People, Careers & Workforce Planning*. This framework facilitated the development of Food and Beverage Ontario's 2020 Strategy for *Jobs and Recovery in Ontario's Food and Beverage Manufacturing Sector*. The strategy will address well-documented labour challenges and more recent workforce concerns due to COVID-19 with a short-term *Stabilizing*, mid-term *Shock Proofing* and long-term *Super Charging* approach.

IDEA: Food & Beverage Ontario runs “Taste Your Future”, a provincial career awareness campaign



The Taste Your Future program partners with stakeholders in academia, government, industry and other like-minded groups. We're particularly proud of our partnerships with FoodGrads, Food Processing Skills Canada and Ontario colleges and universities.

- Accountant**
An accountant will have to perform several duties that will require a good understanding of mathematics, strong logical and analytical and communication skills, attention to detail, and creative problem-solving abilities.
- Administrator**
Within the food and beverage industry, an administrator deals with food safety and tracking after food and beverages have been shipped.
- Baker**
An average day for a baker may involve writing a recipe to the ingredients and prepare dough or batter with several ingredients and tools.
- Brewmaster**
The life of a brewer can be interesting and challenging.
- Butcher**
Butchery is a trade that rewards patience and attention to detail.
- Electrician**
An industrial or maintenance electrician can look forward to an interesting set of duties that tasks that include the installation, maintenance, testing, servicing, repairing and troubleshooting of industrial equipment.
- Engineer**
Engineers who work within food processing can follow lots of different paths within their field.
- Food Processing Supervisor**
A food processing supervisor can choose from several challenging and exciting career paths within the role.

Brewmaster

The life of a brewer can be interesting and challenging

[Learn More](#)

The life of a brewer can be interesting and challenging—they may be responsible for any number of steps in the beer-making process and their job requires plenty of creativity and attention to detail. An average day may involve using beer ingredients such as barley, yeast, and hops, performing maintenance on brew tanks and filtering equipment, bottling the finished beer, and checking on its fermentation. Depending on the brewery's size, a brewer may need to perform a few set tasks, or be comfortable with everything. Management skills are very important too, as is a good palate and inventive mind—developing new beer recipes is also an important and rewarding part of a brewer's job.



IDEA: Food & Beverage Ontario offers free online skills training for jobseekers and new hires



CURRICULUM 2021

Participating is easy! Jobseekers and new hires simply register and follow the prompts to complete a total of 14 courses over 30 hours. Graduation certificates and transcripts are awarded!

I AM FOOD: INTRODUCTION TO THE FOOD & BEVERAGE MANUFACTURING INDUSTRY	5 HOURS	I AM FOOD introduces participants to the Canadian food and beverage processing industry and its greatest strength — the people who work in it.
GOOD MANUFACTURING PRACTICES (GMPs)	2 HOURS	This course teaches the knowledge and skills necessary to understand how GMPs support the safe manufacturing of food and beverages and how to successfully implement GMPs in the workplace.
EMPLOYER EMPLOYEE EXPECTATIONS	2 HOURS	Canadian workplace culture requires individuals to be competent in speaking and listening; be respectful of cultural differences; dress appropriately for the work environment; and, work effectively with others.
FOOD SAFETY CULTURE AND YOU	2 HOURS	Learn the importance of following food safety procedures and practices to ensure consumers are protected and government regulations are met.
WORKPLACE ESSENTIALS: ORAL COMMUNICATIONS	2 HOURS	This course provides guidance on oral and general communication, active listening and feedback, and fostering a positive work environment through team work.
WORKPLACE ESSENTIALS: THINKING SKILLS	2 HOURS	This course provides guidance on decision-making, critical thinking, resolving conflict, and facilitating change for a positive workplace culture.
INTRODUCTION TO EMOTIONAL INTELLIGENCE	2 HOURS	Learn about the value of emotional intelligence to your personal and professional life with skills that help an individual understand themselves better and be more effective in their day to day activities.



This Employment Ontario project is funded in part by the Government of Canada and the Government of Ontario.



ALLERGENS: LEVEL ONE	2 HOURS	This course teaches the requirements to managing food spoilage and food safety by describing how problems occur and how to prevent them.
SANITATION: LEVEL ONE	2 HOURS	This course teaches the basic requirements for cleaning and sanitation in a facility with direction on how to use, handle, prepare and store chemicals, and comply with regulations.
WORKPLACE AND INDUSTRIAL SAFETY	2 HOURS	This course reviews the responsibilities of employers and employees in identifying hazards, mitigating impacts and complying with regulations for workplace and industrial safety.
LOCK OUT & TAG OUT	1 HOUR	Worker safety is paramount in any food and beverage manufacturing facility and requires training with industrial scale processes, automated equipment and potential hazards to ensure a safe workplace.
INTRODUCTION TO SOPS AND SSOPS	2 HOURS	This course reviews the concept of standard operating procedures and sanitation standard operating procedures and the importance to a safe and regulatory compliant business.
CANADIAN WORKPLACE CULTURES	2 HOURS	Learn basic Canadian facts, understand appropriate etiquette, and identify the qualities employers expect in the workplace.
WORKPLACE ESSENTIALS: WORKING WITH OTHERS	2 HOURS	Learn the essential skills needed to work with a partner or a team in the workplace to successfully complete tasks such as resolving a production issue or meeting a rush order.

IDEA: FBO's "Frontline Food Facts" is designed to " help people like you find rewarding jobs at food and beverage companies across the province



Find your future as one of Ontario's frontline food workers!

There are almost 125,000 individuals employed in Ontario's food and beverage processing sector. In fact, we are the province's largest manufacturing sector employer!

Frontline Food Facts is a project started by Food and Beverage Ontario. It's here to help people like you find rewarding jobs at food and beverage companies across the province.



How to Become a Successful Maintenance Manager: A Q&A with Alek Zelnins of Gay Lea Foods

Ontario's Food and beverage processing industry is a vibrant industry that has over 3,800 businesses and over 125,000 direct jobs in the province. One of those jobs in

[READ MORE »](#)



Here are 3 Food Processing Jobs in Demand Right Now

There are almost 125,000 individuals employed in Ontario's food and beverage processing sector. In fact, it's the province's largest manufacturing sector employer.

[READ MORE »](#)



Bonduelle's Michelle Papineau shares her Career Journey in the Food and Beverage Processing Industry

We recently chatted with Michelle about her career journey, what she loves about working in the industry, and her advice for those looking to join it

[READ MORE »](#)

APPENDIX STRUCTURE

- I. Canada
 - 1. British Columbia
 - 2. Alberta
 - 3. Manitoba
 - 4. Ontario
 - 5. Quebec
 - 6. Atlantic Canada
- II. United Kingdom
 - 1. English Regions
 - 2. Wales
 - 3. Scotland



QUEBEC

OUR INDUSTRY



Leading manufacturing sector in Quebec with \$31.3 billion in shipments



First manufacturing employer in Quebec with more than 72,000 direct and 100,000 indirect jobs



The industry transforms 70% of Quebec's agricultural production



The GDP of food processing in Quebec amounts to \$8.3 billion



Exports of around \$9.8 billion for the food processing sector



Food processing includes 2,400 establishments spread across Quebec

CTAQ is a membership organisation that focuses on food processors in Quebec, the second largest food producing region in Canada



DETAILS	
NAME	Le Conseil de la Transformation Alimentaire du Québec (CTAQ)
ADDRESS	216, Rue Denison Est Granby, QC J2H 2R6 QUEBEC
PHONE	+1 450 349 1521
EMAIL	info@conseiltaq.com
WEBSITE	https://conseiltaq.com
# OF STAFF	16
# OF BOARD	31
# OF MEMBERS	600+
OUNDED	1936 as baker's association; 1954 as canners association (renamed food manufacturers in 1964); 1999 merger
COVERAGE	Food processing; baked goods; other foods; industry suppliers

RESOURCES/PUBLICATIONS

- Bi-Weekly Newsletter
- Podcasts
- Weekly press review
- Technical & regulatory bulletin
- Member directory (SNAC)
- Fact Sheets (e.g. stevia)
- Industry guides
- Press Releases

FUNDING MODEL/INCOME STREAMS

- Membership fees
- Event fees
- Other fees and charges

MEMBERSHIP FEES/CHARGES

PROCESSOR
25 price bands based on firm revenue
Revenue under \$500k = C\$300/year
Various price bands in between
Revenue C\$200m+ = \$17,500/year

OTHER
Affiliate C\$1,250/year
Associate C\$7,500/year
Distributor C\$1,250/year
Product/Service Supplier C\$650/year
Ingredient Supplier C\$1,250/year

PROFILE

The Quebec food processing council (CTAQ) is a consolidation of the strengths of the food industry and brings together 80% of the annual business volume of a \$30 billion industry.

MISSION

“The voice of the food industry” of Quebec
OUR MISSION: The CTAQ's mission is to orchestrate excellence and sustainable growth in the food processing sector by supporting its stakeholders and unifying the ecosystem.
OUR VISION: Be the catalyst for the collective intelligence of the sector that stimulates the sustainable growth of the food processing industry in Quebec.

ACTIVITIES/SERVICES

- Government representation (both industry and targeted)
- CTAQ training events
- Networking and events
- Webinars (market research, technical and other topics)
- Annual Food Innovation Awards
- Group insurance buying
- Front line legal advice
- Supplier discounts
- Annual Industry Conference
- Industry Trade Show
- Golf tournament
- CFIA Confidential Complaints Service

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT REQUIRE A LEVY (OR SIMILAR)

GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	AWARDING R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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IDEA: CTAQ brings together a range of industry bodies under its umbrella



FOOD IMPROVEMENT
QUEBEC (AAQ)



ASSOCIATION OF DUCK
AND GOOSE BREEDERS OF
QUEBEC (AECOQ)



THE QUEBEC FOOD
MANUFACTURERS
ASSOCIATION (AMPAQ)



THE ASSOCIATION OF
WINE BOTTLERS (ANEV)



ASSOCIATION OF SMALL
WATER BOTTLERS OF
QUEBEC (APEEQ)



ASSOCIATION OF MEAD
AND HONEY ALCOHOL
PRODUCERS OF QUEBEC
(APHAMQ)



ASSOCIATION OF
ARTISAN COFFEE
ROASTERS OF QUEBEC
(ATAQ)



THE BOARD OF BAKERY
QUEBEC (CBQ)



MAPLE INDUSTRY
COUNCIL (CIE)



QUEBEC EDIBLE CANNABIS
COUNCIL (CQCC)



QUEBEC POULTRY
PROCESSING COUNCIL
(CQTV)



INITIA FOUNDATION



ASSOCIATION OF QUEBEC
MEAT PROCESSORS
(RTVQ)



QUEBEC UNION OF
MICRODISTILLERIES
(UQMD)

IDEA: CTAQ has annual industry innovation awards



CATÉGORIE PRODUITS NOUVEAUX OU AMÉLIORÉS

- A** ALCOOLS DISTILLÉS
Ubald Distillerie – Distillery pour sa Vodka de patate, Route 363
- B** CHOCOLATS, COLLATIONS, DESSERTS ET CONFISERIES
Chocmod Canada inc pour ses Bouchées KETO au cacao
- C** JUS & BOISSONS
LOOP Mission pour ses Sodas probiotiques
- D** METS PRÉPARÉS, PRÊTS À SERVIR OU À ASSEMBLER
Chickumi pour son Bâtonnet de houmous Buffalo et sa sauce BBQ à l'érable
- E** PRODUITS DE BOULANGERIE / PÂTISSERIE
Simply Grain pour son Mélange à Pain et Pâtisserie Simply Grain
- F** PRODUITS DE LONGUE CONSERVATION
Signé caméline pour son Huile de caméline torréfiée Signé caméline
GoGo Quinoa pour sa Gamme de céréales GoGo Quinoa
- G** PROTÉINES VÉGÉTALES
Gusta Foods pour Les hachés végés

CATÉGORIE EMBALLAGE

- H** KLR Systems pour son Attache à pain en carton

CATÉGORIE TECHNOLOGIE & PRODUCTIVITÉ

- I** Innodal pour Inneo, solution anti-listéria naturelle et efficace !

COUP DE CŒUR DU JURY

- J** La Bêlerie pour sa Quiche œuf de canne et agneau

PRIX ENTREPRENEURIAT BANQUE NATIONALE

- K** LOOP Mission

PRIX ENTREPRISE INNOVANTE DESJARDINS

- L** A. Lassonde inc.

PRIX PRODUCTIVITÉ INVESTISSEMENT QUÉBEC

- M** Distillerie NOROI

PRIX ÉCO-RESPONSABLE FASKEN

- N** ENTOMOprotéine

IDEA: CTAQ publishes guides for members on industry topics, for example on “Reformulating Products to Reduce or Eliminate Trans Fats”



Reformulation des produits pour réduire ou éliminer les gras trans:

Un guide pour l'industrie alimentaire



ANNEXE 1

Annexe 1 | 1 Recommandations de produits sains de substitution aux graisses trans selon l'application alimentaire

(Tiré du rapport final du Groupe d'étude sur les graisses trans – juin 2006)

AGP : graisses polyinsaturées
AGM : graisses monoinsaturées

TABLEAU 1 | SUBSTITUTS ACTUELLEMENT DISPONIBLES ET SUBSTITUTS POSSIBLES AUX HUILES ET AUX GRAISSES PARTIELLEMENT HYDROGÉNÉES

Application	Substituts conseillés	Huiles	Caractéristiques ¹				Effets ²
			Autres	AGM	AGP	AGS	
Margarines à usage domestique (durs et de laminage)	Huiles végétales à stabilité moyenne et élevée	<ul style="list-style-type: none"> Canola à haute teneur en acide oléique Tournesol à haute teneur en acide oléique Soja à faible teneur en acide oléique Tournesol à teneur moyenne en acide oléique 	Meilleure résistance à l'oxydation que les huiles végétales ordinaires	+	-	-	A, B
				+	+	ND	B, C
Margarines à usage domestique et pour services alimentaires (molles)	Huiles interstitielles avec de l'huile végétale	<ul style="list-style-type: none"> Séamines de palme et de palmitate avec des huiles de canola Séamines de palme et de palmitate avec des huiles de soja Huiles végétales entièrement hydrogénées et huiles végétales liquides avec des huiles végétales 	De 2 à 4 % d'acides gras trans	+	+	-	A, B
				+	+	+	D, E
Margarines à usage domestique et pour serv. alim. (durs)	Huiles interstitielles avec de l'huile végétale	<ul style="list-style-type: none"> Séamines de palme et de palmitate avec des huiles de canola Huiles végétales entièrement hydrogénées et huiles végétales liquides avec des huiles végétales 	De 2 à 4 % d'acides gras trans	+	+	-	E, F
				+	+	+	E, F
Margarines de pâtisseries	Mélange huiles liquides et huiles hautement saturées	<ul style="list-style-type: none"> Huile de palme, séamines de palme et huiles végétales ordinaires Séamines de palme et de palmitate avec des huiles de soja 	<ul style="list-style-type: none"> Meilleure résistance à l'oxydation que les huiles végétales ordinaires Soja à teneur faible en acide oléique 	+	+	-	A, G
				+	+	+	D, C
Shortening en vaporisateur et liquide pour produits de pâtisseries et de transformation	Huiles interstitielles avec de l'huile végétale	<ul style="list-style-type: none"> Séamines de palme et de palmitate avec des huiles de canola Huiles végétales entièrement hydrogénées et huiles végétales liquides avec des huiles végétales 	De 2 à 4 % d'acides gras trans	+	+	-	A, G
				+	+	+	D, G

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ANNEXE 1

LÉGENDE du tableau des Substituts

Note 1 : (CARACTÉRISTIQUES)

AGM : acides gras monoinsaturés
AGP n-6 : acides gras polyinsaturés de type oméga-6
AGP n-3 : acides gras polyinsaturés de type oméga-3
AGS : acides gras saturés
+ : teneur faible
- : teneur moyenne
ND : teneur élevée

Note 2 : (EFFETS)

Les commentaires au sujet des effets sur la santé sont faits en comparant des produits sensiblement contenant des huiles partiellement hydrogénées.

Effets positifs

- A - Meilleur profil d'acides gras, notamment le rapport des teneurs en acides gras n-6 et n-3.
- B - Peut contribuer à une alimentation qui réduit les risques de maladies cardiovasculaires.
- D - Meilleur profil d'acides gras que le beurre et les margarines dures, qui contiennent plus d'acides gras saturés et moins d'AGP.
- E - Peut réduire le rapport du taux total de cholestérol (ou LDL) au taux de HDL.
- F - Meilleur profil d'acides gras que le beurre, qui a une teneur élevée en acides gras saturés à chaîne longue.
- G - Peut réduire le rapport TC/HDL ou LDL/HDL.
- H - Meilleur profil d'acides gras que les shortenings d'huile hautement saturés ou les graisses animales.

Effets négatifs

- C - Rapport des teneurs en acides gras n-6 et n-3 plus élevé.

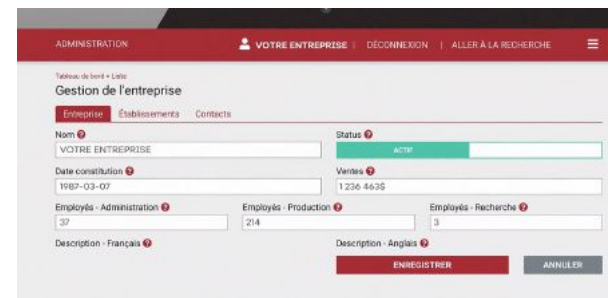
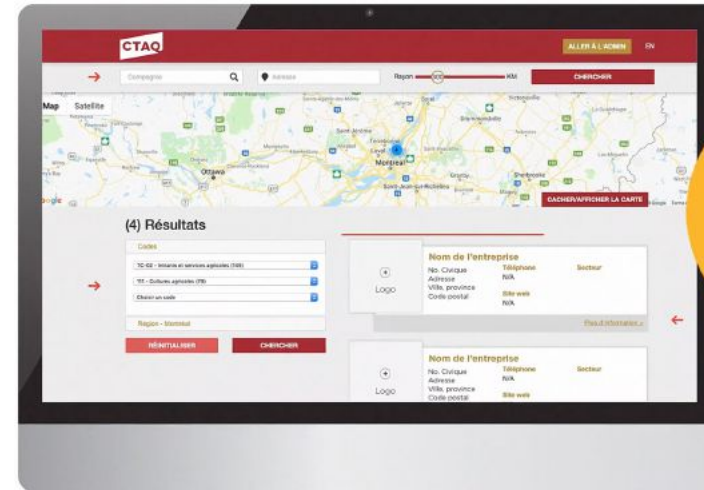
TABLEAU DES SUBSTITUTS (SUITE)

Application	Substituts conseillés	Huiles	Caractéristiques ¹				Effets ²
			Autres	AGM	AGP	AGS	
Margarines de pâtisseries (durs et de laminage)	Mélange huiles liquides et huiles hautement saturées	<ul style="list-style-type: none"> Huile de palme, séamines de palme et huiles végétales à stabilité élevée Séamines de palme et de palmitate avec huiles de soja 	<ul style="list-style-type: none"> Meilleure résistance à l'oxydation que les huiles végétales ordinaires Soja à teneur moyenne en acide oléique 	+	-	-	A, B
				+	+	ND	B, C
Shortening solide pour produits de pâtisseries et de transformation	Mélange d'huiles pour solides et usage performant	<ul style="list-style-type: none"> Huile de palme, séamines de palme et huiles végétales à stabilité moyenne Séamines de palme et de palmitate avec huiles de canola 	<ul style="list-style-type: none"> Meilleure résistance à l'oxydation que les huiles végétales ordinaires Soja à teneur moyenne en acide oléique 	+	+	-	A, E
				+	+	+	A, E
Shortening en vaporisateur et liquide pour produits de pâtisseries et de transformation	Huiles interstitielles avec de l'huile végétale	<ul style="list-style-type: none"> Séamines de palme et de palmitate avec huiles de canola à haute teneur en acide oléique Huiles végétales entièrement hydrogénées et huiles végétales liquides avec des huiles végétales 	<ul style="list-style-type: none"> Meilleure résistance à l'oxydation que les huiles végétales ordinaires Soja à teneur faible en acide oléique 	+	+	-	A, E
				+	+	+	A, E
Shortening en vaporisateur et liquide pour produits de pâtisseries et de transformation	Mélange d'huiles pour solides et usage performant	<ul style="list-style-type: none"> Huile de palme, séamines de palme, huile entièrement hydrogénée et huiles végétales à stabilité moyenne Séamines de palme et de palmitate avec huiles de canola à haute teneur en acide oléique 	<ul style="list-style-type: none"> Meilleure résistance à l'oxydation que les huiles végétales ordinaires Soja à teneur moyenne en acide oléique 	+	+	+	E, H
				+	+	+	E, H
Shortening en vaporisateur et liquide pour produits de pâtisseries et de transformation	Huiles interstitielles avec de l'huile végétale	<ul style="list-style-type: none"> Séamines de palme et de palmitate avec des huiles de canola ou de soja Canola à teneur élevée en acide oléique Soja à teneur moyenne et élevée 	<ul style="list-style-type: none"> Meilleure résistance à l'oxydation que les huiles végétales ordinaires Soja à teneur moyenne en acide oléique 	+	+	-	A, B
				+	+	+	B, C

GUIDE POUR L'INDUSTRIE ALIMENTAIRE 35

IDEA: CTAQ operates SNAC platform: a digital, food & collaborative system to unite our know-how and innovate in order to advance the whole industry

Discover
the industry's
SNAC



APPENDIX STRUCTURE

- I. Canada
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 - 5. Quebec
 - 6. Atlantic Canada
- II. United Kingdom
 - 1. English Regions
 - 2. Wales
 - 3. Scotland



Food & Beverage Atlantic is a membership organisation that focuses on food processors across the Eastern Seaboard of Canada

ALIMENTS ET
BOISSONS
ATLANTIQUE™



FOOD &
BEVERAGE
ATLANTIC™

DETAILS

NAME	Food & Beverage Atlantic
ADDRESS	Albert St. Moncton, NB, E1C 1 A9 CANADA
PHONE	+1 506 857-4255
EMAIL	admin@atlanticfood.ca
WEBSITE	https://atlanticfood.ca/
# OF STAFF	4
# OF BOARD	18
# OF MEMBERS	Not disclosed
FOUNDED	1999 (as the New Brunswick Food & Beverage Processors Association)
COVERAGE	Food & beverage processors Seafood processors Industry suppliers Various agencies Educational institutions

RESOURCES/PUBLICATIONS

- Member Database (member only)
- Members Only Portal
- Presentations from conferences
- Mailing list

FUNDING MODEL/INCOME STREAMS

- Not for profit
- Membership fees
- Course and training fees
- Historical government funding and grants

MEMBERSHIP FEES/CHARGES

Not disclosed

PROFILE

FBA continues to expand its activities in key programs including delivering affordable, accessible food safety and regulatory training programs, innovative and affordable marketing and partnership opportunities and industry conferences. We help lead export trade missions (both physically and now virtually) in the United States, Latin America, Asia, India and Europe. Always building forward to provide added benefits, FBA encourages the participation and contribution of its members with the goal to improve the well-being and bottom line of each individual company and our sector as a whole.

MISSION

Food and Beverage Atlantic (FBA) is committed to driving the success of food and beverage companies across our region. We deliver programming focused on the sustainability and growth of the Atlantic Canada food and beverage sector, from farmers markets to international markets.

ACTIVITIES/SERVICES

- Advocacy: “Your voice is heard”
- “Access exclusive member resources”
- “Network with industry leaders”
- Food Safety & regulatory training
- Business Development training
- Tailored training programs
- Negotiate discounted rates with industry suppliers
- “Unique opportunities for product visibility”
- Direct access to retailers
- Lead trade missions (both physically and now virtually)

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT REQUIRE A LEVY (OR SIMILAR)

GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	AWARDING R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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How do they see their role? What do they do?

“FBA has been an incredible support system to my company- both before Covid and now during all the upheaval and adjustments. Tammy Brideau and her team have reached out over and over again to help with marketing, sales, distribution, networking, and moral support. They respond quickly to issues with the compassion and knowledge it takes to get a community through good times and bad. Thanks FBA! ”

Julain Molnar, CEO, Fresh Start Fauxmage
(quoted on F&BA website)

“Each year we are required to take a number of food safety and other related courses. The discounts we receive on these courses through our Food and Beverage Atlantic membership always pays for the cost of the membership. That alone would be reason enough to be a member, but our membership also gives us access to exclusive opportunities and support we find extremely valuable. ”

Ramona Roberts, General Counsel, A&R Adventures Inc.
(quoted on F&BA website)

“Thank you FBA! With our business busting at the seams, we needed help from a co-packer but were completely lost... how to find one? FBA saved the day by helping us make connections that have grown into wonderful, rewarding partnerships. Thanks again!”

Susan Adolph, Owner, Oh! Canada Seedr.”
(quoted on F&BA website)

What are some good ideas from this organisation?

1

PROVIDE ACCESS TO
A **MEMBERSHIP
DATABASE**

- “Enjoy exclusive access to the FBA membership list, so you can network with food and beverage businesses all across Atlantic Canada.”

2

OFFER
**CUSTOMISED
TRAINING
PROGRAMS**

“Training is an essential part of building and growing a business. Based on member surveys, your FBA team is able to design and craft customized training workshops to benefit you and your staff. Simply tell us what you need and we’ll get the job done!”

“Tailored Training based on industry trends and with a focus on business growth a series of workshops will be customized for you.”

F&BA website

3

DELIVER RELEVANT
**COURSES &
SEMINARS**

For example:

- Foundations in Food Safety Masterclass
- US Nutrition & Ingredient Labeling Review 2022
- ECRM – Efficient Collaborative Marketing Program – Spring/Summer 2022
- Supply Chain 1-2-3
- European Export for Food and Beverage Companies (webinar series)

APPENDIX STRUCTURE

I. Canada

1. British Columbia
2. Alberta
3. Manitoba
4. Ontario
5. Quebec
6. Atlantic Canada

II. United Kingdom

1. English Regions
2. Wales
3. Scotland

III. United States

1. California
2. Pacific Northwest
3. Midwest
4. Southeast
5. New Jersey

IV. Australia

1. Queensland
2. South Australia
3. Victoria

FDF is an industry body representing food and beverage manufacturers across the UK, with branches in Scotland and Wales



DETAILS

NAME	The Food and Drink Federation
ADDRESS	6th Floor, 10 Bloomsbury Way London WC1A 2SL UNITED KINGDOM
PHONE	+44 20 7836 2460
EMAIL	members.enquiries@fdf.org.uk
WEBSITE	https://www.fdf.org.uk https://www.fdfscotland.org.uk https://www.fdf.org.uk/wales/
# OF STAFF	65 (across UK, Scotland & Wales)
# OF BOARD	X
# OF MEMBERS	300+ companies 1,000+ members
FOUNDED	N/A
COVERAGE	Food and beverage manufacturers, suppliers, affiliated academics

RESOURCES/PUBLICATIONS

- Newsletter
- FDF State of the Industry Survey
- FDF Trade Snapshot
- FDF Economic Insights
- Best Practice Case Studies
- Social media (Twitter, Instagram, Facebook)
- Webinars
- Podcasts

FUNDING MODEL/INCOME STREAMS

- Membership fees
- Sponsorships
- Event fees
- Training/course fees
- Advertising

MEMBERSHIP FEES/CHARGES

PROCESSOR
Membership fees are based on your company's UK turnover and start at £233.61+VAT per million of turnover up to £765m and £145.36 per million of turnover thereafter.

OTHER MEMBERSHIPS
Academic Affiliate Membership
Professional Affiliate Membership

PROFILE

We represent and protect the interests of food and drink companies of all sizes, across all sectors of the industry. Our members range from global brands to SME's and growing artisan sole traders. With a range of strategic, operational and practical benefits, we support our members in all aspects of their business. Powerful advocacy, regulatory support and scientific expertise are just some most valued member benefits.

MISSION

Being an FDF member will equip you with the expertise to grow, protect and strengthen your business.

ACTIVITIES/SERVICES

- Advocacy: "We are the first port of call for Government on any issue relating to food and drink and are active across the UK, Scotland and Wales on a wide range of policy."
- Access to FDF experts
- FDF Awards
- Specialist committees and sector groups
- Future in Food Careers Initiative
- Reformulations for Health programme
- Specialist committees and sector groups where you can get involved and keep up to speed on the topics, legislation and policy most relevant to your role and sector
- Opportunities to develop your business with insights, trends, partner offers and member discounts on events and training
- Chances to connect and network with industry peers, hear from expert speakers and share best practice
- Information and toolkits from labelling and allergens through to alerts and recalls

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT REQUIRE A LEVY (OR SIMILAR)

GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	AWARDING R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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How do they see their role? What do they do?

“The FDF’s members have access to unrivalled policy insight and expertise affecting food and drink manufacturing across the UK. Our core strength is our deep understanding of industry issues, which ensures we are well placed to deliver results for our members.

We are organised into seven expert teams of over 70 people across England, Scotland and Wales to help members navigate the complex and fast evolving policy landscape and keep you abreast of the latest developments wherever you are.”

FDF website

What are some good ideas from this organisation?

1

NEGOTIATE DISCOUNTS FOR MEMBERS

- Special offers: Exclusive offers from our professional affiliates for members
- Through our network of affiliates, FDF members can benefit from the support of legal, professional services and environmental partners. You can confidently work with our affiliates who understand your business needs and sector.

2

CONDUCT A STATE OF THE INDUSTRY SURVEY

- Insights from the most recent FDF State of the Industry Survey
- "This webinar is set to explore trends in the Food and Drink Manufacturing sector in Q1 based on findings from our State of Industry Survey. Our economists, Dr Liliana Danila and Uros Milosevic, will examine our industry performance on a number of indicators, such as output or new product development. They will set their analysis against the wider economic backdrop of strong inflationary pressures, supply disruptions and extraordinary uncertainty."


3

DELIVER A RANGE OF COURSES TO MEMBERS

For example:

- Course 1a: An Introduction to the structure of environmental law
- Course 1b: Introduction to identifying environmental laws in your organisation
- Course 2a: Waste legislation and best practice management.
- Course 2b: Water legislation
- Course 2c: Air, energy and carbon legislation

IDEA: FDF runs a series of social networking events, for example the “Future Leaders Networking Reception”



Event

- 09 June 2022
- 18:30 - 23:00
- The Royal College of Surgeons
[Map and directions](#)

[£ FDF Event >](#)

Join us on **Thursday 9 June** for our annual **Future Leaders Drinks Reception** taking place at **The Royal College of Surgeons!**

This networking event celebrates the talents and achievements of the industry's future leaders.

[Login to register >](#)

£ Pricing (includes VAT)

	Non-members	Members	Saving
Standard (tickets available until 09/06/2022)	£144.00	£114.00	£30

The Guild of Fine Food cover the total UK market and is the backend to the Great Taste Awards



DETAILS	
NAME	The Guild of Fine Food
ADDRESS	23b Kingsmead Business Park Shaftesbury Road, Gillingham SP8 5FB UNITED KINGDOM
PHONE	+44 1747 825 200
EMAIL	support@gff.co.uk
WEBSITE	https://gff.co.uk/join-the-guild/ https://greattasteawards.co.uk/
# OF STAFF	21
# OF BOARD	N/A
# OF MEMBERS	1,300
FOUNDED	1995
COVERAGE	Independent food producers and retailers

RESOURCES/PUBLICATIONS

- Membership directory
- Fine Food Digest magazine
- Good Cheese (annual)
- Great Taste Book
- Best Brands (by Fine Food Digest)
- Industry Codes of Practice

FUNDING MODEL/INCOME STREAMS

- Membership fees
- Event entry fees
- Event entry fees
- Course fees
- Advertising
- Sponsorships (particularly of awards)

MEMBERSHIP FEES/CHARGES

Small business (turnover less than £1m):
£150+VAT per year

Medium business (turnover between £1-5m):
£250+VAT per year

Large business (turnover more than £5m):
£450+VAT per year

PROFILE

With over 1,300 members across the UK, the Guild is a publisher, events and awards organiser and training provider, with a network of activities designed to promote excellence in all sectors of the trade and build closer links between producers and retailers.

MISSION

Support, Knowledge, Connection, Advocacy

- To represent, celebrate and champion the independent food and drink sector
- To promote excellence and best practice in independent food and drink retail and production
- To facilitate a network for like-minded companies to communicate and trade
- To provide advice and a knowledge base to assist with continuing development within the industry
- To offer independent retailers and producers access to the tools and resources needed to meet legislative requirements, providing a level of protection for their day-to-day business

ACTIVITIES/SERVICES

- Advocacy
- Great Taste Awards (Black Tie Dinner)
- World Cheese Awards
- Great Taste Markets (at 8 locations in 2022)
- School of Fine Food courses
- Training courses
- Free HR advice
- Free insight6 mystery shop one per year
- Fine Food Show North
- London venue hire

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT REQUIRE A LEVY (OR SIMILAR)

GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	AWARDING R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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How do they see their role? What do they do?



“Why should I consider joining the Guild of Fine Food?”

Running a business on your own can be a lonely existence. The Guild of Fine Food should be your first port of call for any retail business-related issue and provides you with a platform from which to share experiences with your fellow retailers and producers.

The Guild of Fine Food is also the organisation that publishes Fine Food Digest, Good Cheese, Best Brands and Great Taste Book, the industry’s leading magazines. We organise Great Taste and the World Cheese Awards, run the Fine Food Show North and a number of Great Taste Markets, as well as train individuals in cheese, deli products and in business matters relating to fine food retail.

We’re at the centre of it all. Be a part of it.” GFF website

“Great Taste is the world’s largest and most trusted food and drink accreditation scheme. Putting your food or drink to the test with our panel of over 500 experts is a quick way to get honest, straightforward and impartial feedback from chefs, buyers, food writers and retailers. Whether your product receives a 1-, 2- or 3-star accolade, Great Taste stars are highly respected seals of approval.”

GFF website

“The Great Taste Awards are the Oscars for the food & drink industry. It’s the time of year when producers across the world wait with bated breath to see how their products have been received by the prestigious Great Tasting judging panel. 2021 saw no fewer than 12,000 entries to the leading international food and drink awards. This year the products were in the judging room where, with Covid safe measures in place, each was put through their paces by over 500 judges. The whole process took up to six weeks. It’s a massive logistical operation but it is this level of scrutiny and robust judging that enables the awards to consistently stand out. So, who will be this year’s winners of the highly sought after one, two, or three stars?” The Food Marketing Experts UK

“Guild of Fine Food was formed in 1995 with a mission to support artisan food and drink producers and the independent delicatessens, farm shops and food halls that mainly stock and sell their food and drink. With over 1,300 members across the UK, the Guild is a publisher, events and awards organiser and training provider, with a network of activities designed to promote excellence in all sectors of the trade and build closer links between producers and retailers. Fine Food Digest is ‘the industry voice’ for speciality food retailers and producers and through the School of Fine Food, trade delegates are trained in cheese, the business of retail and on selected deli products. Organisers of two awards schemes, Great Taste and World Cheese Awards, and the Fine Food Show North, the Guild of Fine Food is at the centre of the fine food world. Great Taste was launched 25 years ago and has become the acknowledged benchmark for speciality food and drink in the UK and around the world. Each year 500 experts blind taste over 12,000 foods. Only the best are awarded one-, two- and three-star.” GFF firm profile

What are some good ideas from this organisation?

1



CONDUCT ANNUAL FOOD AWARDS

- 12,700 entries; ca. 5,500 awards given
- 1, 2 and 3 stars; supreme champion; regional Golden Fork awards; other awards
- 500 food & drink experts as judges
- "A massive logistical exercise"
- Sliding scale for entry fees
- Consumer facing website searchable and showing stockists
- <https://greattasteawards.co.uk>

2



RUN REGIONAL MARKETS

Featuring award-winning food and drink producers from Great Taste, the market is your chance to taste and buy from these artisan producers. Come and talk to the makers and hear first hand how they create their products and how you should enjoy them. Great Taste Markets in 2022 are:

- IFEX 2022 29 – 31 March
- Taste of London Summer Edition – 15 – 19 June
- Taste of Dublin 16 – 19 June
- RHS Hampton Court Palace Garden Festival 4 – 9 July
- RHS Tatton Park Flower Show 20 – 24 July
- The Game Fair 29 – 31 July
- Spirit of Christmas 31 October – 6 November
- Taste of London Festive Edition 17 – 20 November

3



PUBLISH A GUIDE TO WINNERS

Great Taste Book is the annual celebration of Great Taste winners. Within the pages readers can find out who the major winners are, read about how award-winning producers get an award and understand more about the judging process.

Distributed to over 150,000 trade and consumer buyers. 55,000 copies printed and distributed through trade and consumer titles and a further 94,000 distributed digitally.

IDEA: GFF give out the Great Taste Awards that members can use to promote their products

WHAT DO THE STARS MEAN?

Each jar, packet or bottle displaying a Great Taste logo is a guarantee every product has been through the rigorous and independent judging process. The logo will display the year it was judged and a star-rating.

IT'S NOT ABOUT SMART PACKAGING OR CLEVER MARKETING - IT'S ALL ABOUT GREAT TASTE.

great taste 2021 3-STARS: EXQUISITE	great taste 2021 2-STARS: OUTSTANDING	great taste 2021 1-STAR: SIMPLY DELICIOUS
Extraordinarily tasty foods – around 2% of products are awarded 3-stars each year. Don't leave the shop without buying it!	Above and beyond delicious – less than 10% of entries will achieve this rating.	A food that delivers fantastic flavour – approximately 25% of entries will achieve this rating each year.

TO SEARCH FOR ALL GREAT TASTE WINNERS PAST & PRESENT GO TO: GREATTASTEAWARDS.CO.UK

FINE FOOD | gff.co.uk | greattasteawards.co.uk | [@guilloffinefood](https://twitter.com/guilloffinefood) #greattasteawards #spygreattaste

Making the most out of your Great Taste Award win

Having worked so hard to gain a Great Taste Award, what should you do when you receive confirmation of your distinguished accolade? Here are some top tips to consider to help spread the news, and ultimately, make the most of your achievement.

1. Prioritise sharing the great result far and wide: For example:

- Share on social media, both in posts and stories. Update your social media bios with your wins
- Use the judge's feedback as quotes for your social media and marketing material
- Update your website to announce the wins
- Add to your email signature
- Send out a press release to both trade and consumer titles
- Share it with your local radio station and press (including digital)
- Include in any newsletter activity to your consumers
- Include in any newsletter activity to trade customers and incorporate the judges feedback

2. Add the Great Taste winner logo to your packaging

3. Leverage the news to open up new opportunities and to sell into buyers representing outlets where you would like to see your products stocked. Remember GTAs are recognised globally.



IDEA: Members promote their Great Taste Awards on their products and in their advertising

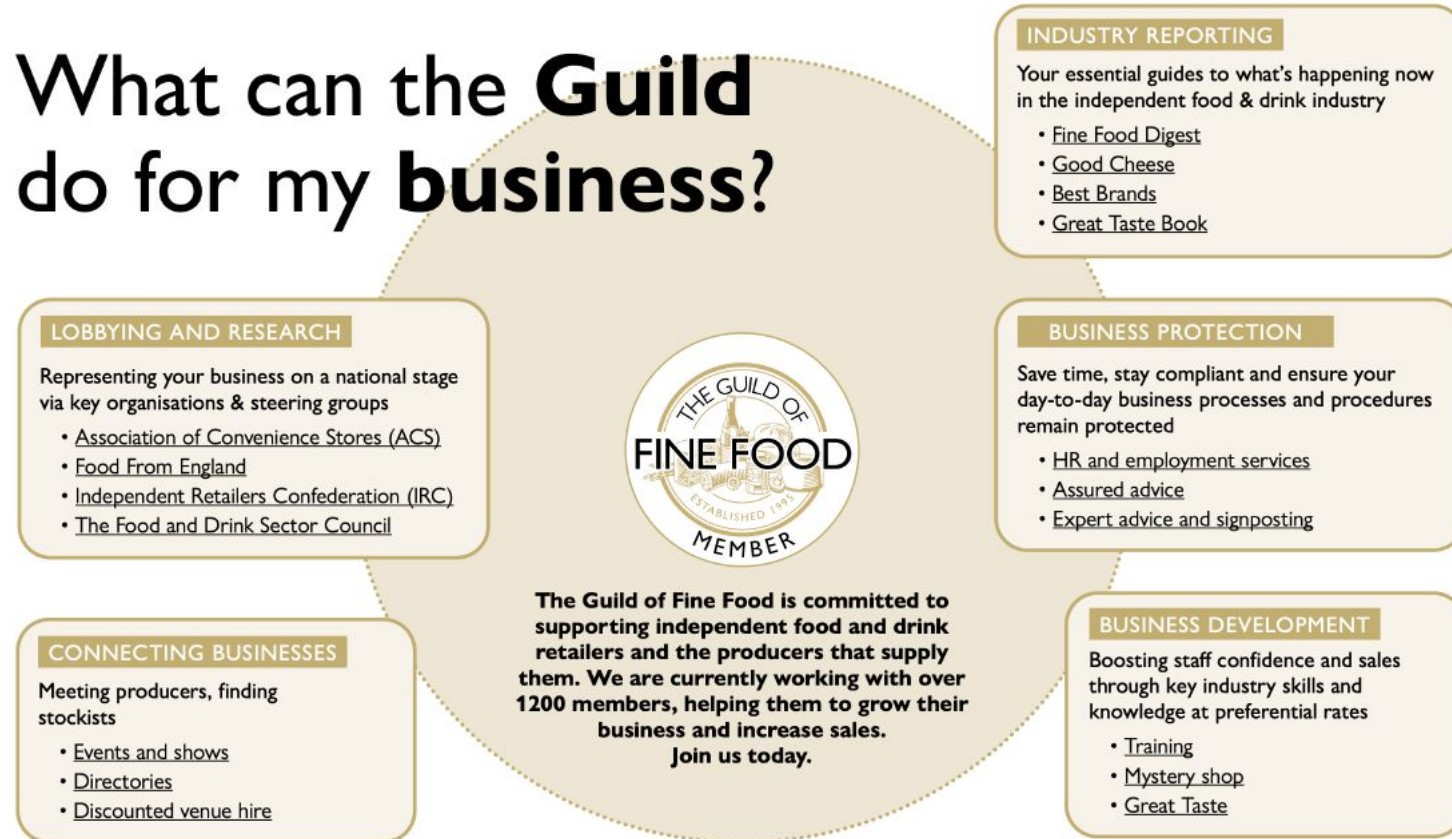


IDEA: GFF attracts a wide range of sponsors for the Great Taste awards



IDEA: GFF has a clear message about the benefits of membership

What can the **Guild** do for my **business**?



SUPPORT | KNOWLEDGE | CONNECTION | ADVOCACY

APPENDIX STRUCTURE

I. Canada

1. British Columbia
2. Alberta
3. Manitoba
4. Ontario
5. Quebec
6. Atlantic Canada

II. United Kingdom

1. English Regions
2. Wales
3. Scotland

III. United States

1. California
2. Pacific Northwest
3. Midwest
4. Southeast
5. New Jersey

IV. Australia

1. Queensland
2. South Australia
3. Victoria

Taste of the West is a regional membership organisation focused on marketing and promoting members in six regions of England



DETAILS

NAME	Taste of the West Ltd
ADDRESS	Country House Estate London Road, Whimple, Exeter, Devon EX5 2NL UNITED KINGDOM
PHONE	+44 1404 822012
EMAIL	enquiries@tasteofthewest.co.uk
WEBSITE	https://www.tasteofthewest.co.uk/
# OF STAFF	8
# OF BOARD	Not disclosed
# OF MEMBERS	350 food & drink producers 400+ hospitality & retail businesses
FOUNDED	1991
COVERAGE	Food and drink producers, distributors, restaurants, cafes, pubs, hotels, farm shops and specialist retailers

RESOURCES/PUBLICATIONS

- Consumer Food finder (shop, eat, tour, visit)
- Industry trade directory/database
- Industry newsletter
- Recipes / recipe books

FUNDING MODEL/INCOME STREAMS

- Co-operative
- Membership fees
- DEFRA (government agency)
- "Patron" is HRH Prince Charles
- Sponsorship of awards

MEMBERSHIP FEES/CHARGES

Producer member
"as little as £10.50 + VAT a month"

Hospitality member
"as little as £13.50 + VAT a month"

Retail membership
"as little as £13.50 + VAT a month"

Wholesale membership
"as little as £9.50 + VAT a month"

Affiliate membership
"£26 + VAT a month"

PROFILE

We are the largest independent regional food group in the UK and we're here to promote and support fantastic local food and drink from this region. That's Cornwall, Devon, Dorset, Gloucestershire, Somerset and Wiltshire.

MISSION

Our aim is to champion food and drink producers in the West Country, as well as all the places that serve and sell them, to prove that when it comes to what you eat and drink, it really is best in the South West. Membership of Taste of the West opens the door to a huge range of opportunities to help your business grow. Being a Taste of the West member is a reflection of the quality and integrity of what you do. Taste of the West is a widely recognised brand, and members displaying the regional food group logo are clearly demonstrating their passion and support for local and regional produce to their customers and consumers.

ACTIVITIES/SERVICES

- Use of Taste of the West logo
- Taste of the West Awards
- Meet-the-buyer
- Trade shows
- Negotiated discounts for members

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT REQUIRE A LEVY (OR SIMILAR)

GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	AWARDING R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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How do they see their role? What do they do?

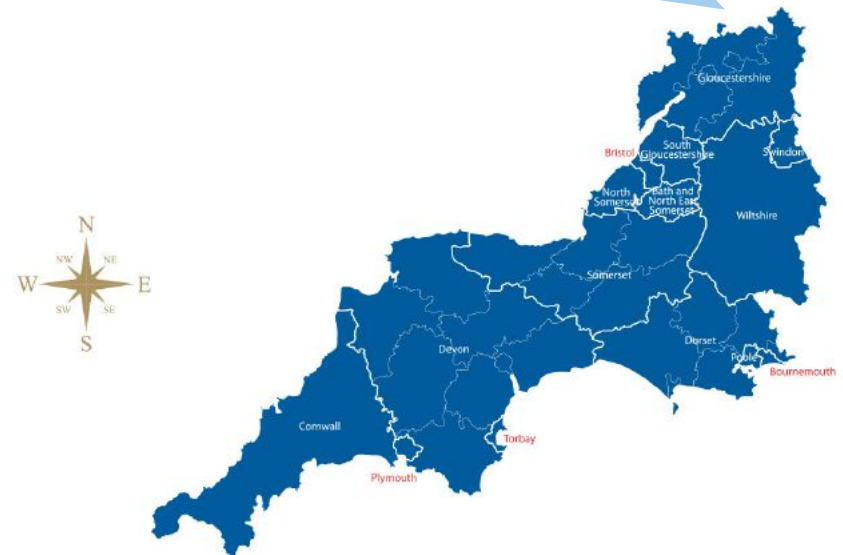
“The Taste of the West Product Awards programme comprises 23 food and drink categories. Just over 1,000 products were entered this year and panels of experts evaluated each product individually, assessing its appearance, aroma, texture, packaging, and most importantly its taste. The results revealed 320 Gold, 206 Silver and 149 Highly Commended awards to over 300 producers throughout the South West. All the judges were very impressed with the quality and above all the consistency at such a high level of production within the industry.

The Taste of the West Hospitality and Retail Awards scheme comprises 12 categories. This year entries were received from almost 350 establishments across the South West. We sent our team of experienced, professional judges out to each and every one to eat and shop their way around them all, and the results concluded in a staggering 200 Gold awards. We are constantly impressed by how the quality within the hospitality and retail industry has risen and continues to do so year after year.” Taste of the West brochure

“This year Taste of the West is celebrating its 30th anniversary and are incredibly proud to be the UK’s largest independent regional food group. Times change but our values don’t – for 30 years we have been working together with support from our members, sponsors and partners for a sustainable future in South West food and drink. The results so far from this year’s Taste of the West Product Awards are a true reflection of the provenance, quality and integrity that food and drink producers in the West Country have to offer.”

John Sheaves, Chief Executive of Taste of the West

“Taste of the West is the largest independent regional food group in the UK and we work hard to promote and support fantastic local food and drink from Cornwall, Devon, Dorset, Gloucestershire, Somerset and Wiltshire. We are a truly unique organisation, owned by over 1,000 members including food and drink producers, restaurants, cafes, pubs, hotels, farm shops and specialist retailers in the South West - all passionate about the provenance and quality of the products they make, serve or sell. Our company was established in 1991, and today we remain the leading supply chain co-operative for the South West's food and drink industry. Our ethos of quality, integrity and provenance underpins everything we do.” Taste of the West website



What are some good ideas from this organisation?

1



CONDUCT ANNUAL FOOD AWARDS

- Awards across (1) food and beverage products, (2) food retailers and (3) hospitality
- Champion (1), Gold (291), Silver (81), Highly Commended (13), Commended (7), Finalist (14)
- Annual Awards Event that acts as social glue for the regions
- Members can use awards on packaging, in store and in restaurant/bar/venue

2

OFFER REGIONAL RECIPES FROM MEMBERS

Delivered on consumer facing website

For example:

- Recipes from Cornwall
- Recipes from Devon
- Recipes from Dorset
- Recipes from Gloucestershire
- Recipes from Somerset
- Recipes from Wiltshire

3

DELIVER A CONSUMER FACING FOOD FINDER

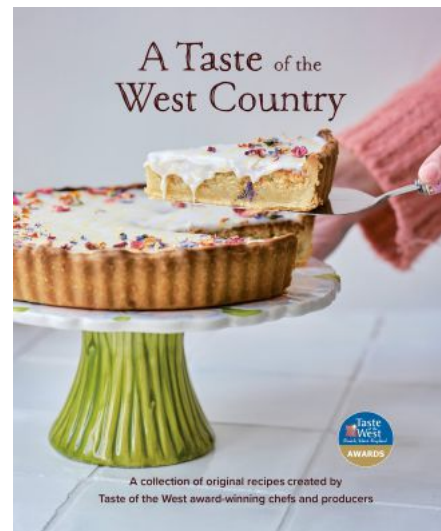
Website directory of members /award winners

Searchable map

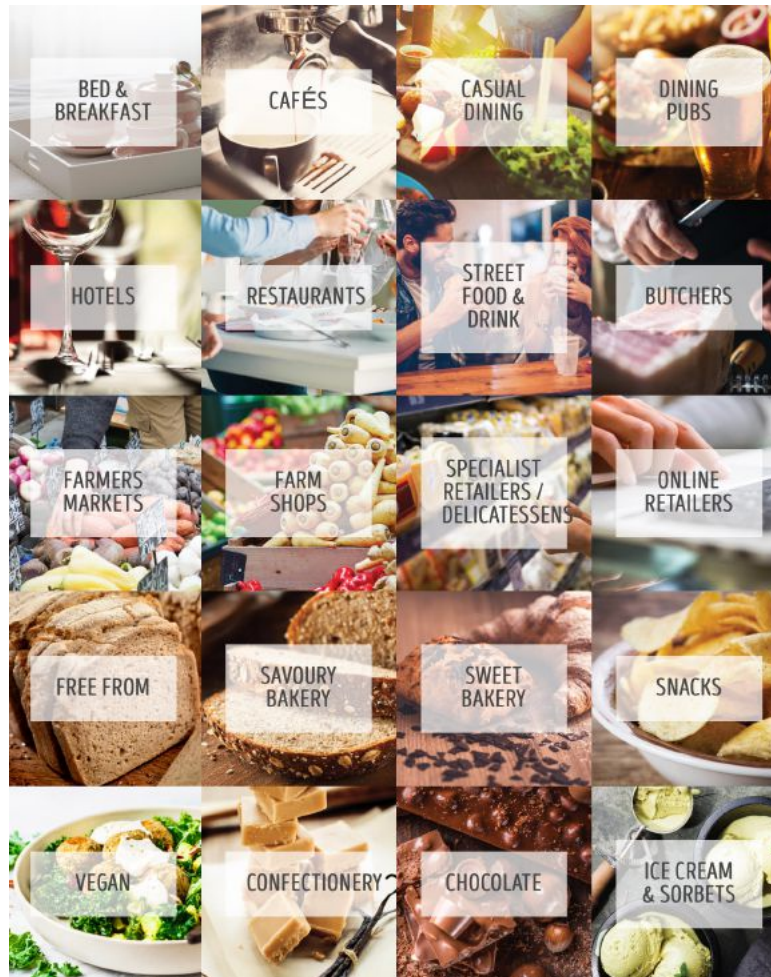
Classified in multiple ways:

- Somewhere to eat
- Somewhere to shop
- Somewhere to visit
- Somewhere to stay

IDEA: Taste of the West has industry awards for food and beverage products, hospitality and retail



IDEA: Taste of the West gives awards for a huge range of categories, with numerous awards under each category; everyone goes home with a prize



Food Drink Devon is a regional membership organisation focused on marketing and promoting members



DETAILS

NAME	Food Drink Devon
ADDRESS	Moorgate House, King Street, Newton Abbot, Devon, TQ12 2LG UNITED KINGDOM
PHONE	+44 7789 666064
EMAIL	admin@fooddrinkdevon.co.uk
WEBSITE	https://fooddrinkdevon.co.uk
# OF STAFF	5
# OF BOARD	7
# OF MEMBERS	N/A
FOUNDED	1995/2009
COVERAGE	Producers, Hospitality, Retailers, Service Providers (e.g. cooking classes), Accommodation

RESOURCES/PUBLICATIONS

- “Discover Delicious Devon” consumer directory
- Publishing regional recipes

FUNDING MODEL/INCOME STREAMS

- “Food Drink Devon is a not for profit Limited Company governed by a Board of Directors who pay their membership and give their time for free. We are self-funded through membership fees and other commercial activities.”
- Event fees, admission & sponsorship

MEMBERSHIP FEES/CHARGES

Business Membership (per year)

Up to £85,000 - £125 +VAT (£150)
(for new start-up businesses only, in their first year of trading)
Up to £149,000 - £180 +VAT (£216)
£150,000 – £499,999 - £270 +VAT (£324)
£500,000 – £1M - £360 +VAT (£432)
Over £1M - £450 +VAT (£540)

Supporter Membership (per year)

Up to £499,999 - £300 +VAT (£360)
£500,000 – £1M - £400 +VAT (£480)
Over £1M - £500 +VAT (£600)

PROFILE

Food Drink Devon is a not-for-profit membership organisation of food and drink and related businesses from the county. With a focus on quality, sustainability and provenance, our aim is to support and promote our members and raise Devon’s culinary profile as a whole.

MISSION

Quality. Sustainability. Provenance. Our passion is for Devon’s exceptional food and drink to be enjoyed globally.

ACTIVITIES/SERVICES

- Logo: use of the Food Drink Devon green heart logo which represents quality, sustainability and provenance
- Online promotion: your own page on our website where you can promote your news, events, recipes and offers
- E-marketing to consumers: the opportunity for coverage in our monthly newsletter sent to over 10,000 foodies
- Business to business e-marketing: the opportunity for coverage in our monthly member’s newsletters
- Social Media: the opportunity to have your news promoted to over 40,000 followers on social media
- Face-to-face promotion: at a range of annual trade shows and food festivals
- Extensive PR opportunities: presence at events in London, media opportunities (radio, television and print)
- Networking & training events: discounted prices for Food Drink Devon workshops
- Discounts: membership discounts
- Mentoring service: with one of our Board of Directors
- Awards: discounted entry into our Awards

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT REQUIRE A LEVY (OR SIMILAR)

GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	AWARDING R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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How do they see their role? What do they do?

“Food Drink Devon has been such an amazing benefit to our company throughout the past 2 years. Having to rebrand at the beginning of lockdown in 2020, FDD really went the extra mile to help us understand how to reach out on a new platform, promoting and marketing, to access new customers by using social media. Thank you, to everyone at FDD for their continued support and guidance.”

Ria, Veyseys Butchers

“A huge thanks to the whole team for last night's awards ceremony. It was really well organised and everyone we spoke to had nothing but positive thoughts for the work you have done in promoting Food & Drink in Devon this year. Thank you for hosting us, the food was excellent as was the company, we're delighted with the Award we received and will further promote it with members of our team on Social Media over the forthcoming days, weeks and months.” Nick Smith, Home Farm Café

“The great thing about being a part of @fooddrinkdevon is all the other producers we get to meet. @forestfungidawlish is one of those and now we get a regular delivery of a mix of good local tasty mushrooms. Win win!!”

Duke Street

“Why enter? Apart from media recognition and the prestige of using award success in your marketing if you're a winner, every entrant who chooses to can get valuable and constructive feedback on their entry. The independent panel of experienced judges will mystery shop the Hospitality and Retailer entries, and blind-taste the Producer entries. For the small investment of time to complete your entry, you can receive a confidential appraisal of your products and services as they are presented to your customers, helping you maintain and improve your quality standards.” FDD website

What are some good ideas from this organisation?

1

DELIVER REGIONAL FOOD & DRINK AWARDS

- Currently in their eleventh year and with 4 main award categories:
- Producer Awards for individual items produced by primary and secondary producers.
- Hospitality Awards for restaurants, hotels, cafés, bistros, pubs, bars, takeaways and street food.
- Retailer Awards for farm shops, delis, food halls, community shops, other food and drink shops and online retailers.
- New for 2022: Chef of the Year - open to any Head Chef, Sous Chef or Private Chef who live and work in Devon

2

PROVIDE AN **INDUSTRY DIRECTORY** ACROSS THE TOTAL CHAIN

- “You can discover the best of delicious Devon through the detailed profiles and the interactive map below, search by business name, or narrow your selection using the filters. Tuck in!”
- Producers
- Hospitality
- Retailers
- Service Providers (e.g. cooking classes)
- Accommodation

3

PUBLISH REGIONAL **RECIPES**

- Recipes using regional produce provided by organisation members
- For example:
- Lyme Bay Bass with Cauliflower and Caviar
 - Valentine's Cocktail by Exeter Gin
 - The Pure Stock Co – Boulangère Potatoes

IDEA: FDD delivers annual awards across four categories with awards delivered at an industry award ceremony

PRODUCER AWARDS

The Devon Producer Awards are open to Food & Drink producers based in Devon using Devon ingredients.

Individual products will be blind-tasted by an independent and unbiased expert judging panel and outstanding products will be awarded Silver, Gold or Platinum awards. An independent adjudicator will verify the results and winners. Awards will also be given to Product of the Year and a new Award for Best New Product of the Year.

Entry Fee

Food Drink Devon Member - Entry is free for 2 products per company. Then £35+vat per additional product.

Non-Members - Entry is £35+vat per product (Entry fees will be deducted from your first year's membership costs, if you sign up for Food Drink Devon membership before 22 April 2022).

All producers submitting an entry agree to sending samples of their entered products to Food Drink Devon in June 2022.

HOSPITALITY AWARDS

The Hospitality Awards are open to all Devon based hospitality establishments. By entering you are agreeing to provide a free meal for two judges. All entrants will be visited by independent and unbiased expert judges during May, June or July 2022. If you wish to enter more than one category you are required to provide the necessary vouchers/cash for each.

Outstanding establishments will be awarded Silver, Gold or Platinum awards. An independent adjudicator will verify the results and the overall winner of each category.

Entry Fee

Food Drink Devon Member - Entry is free for 1 category and then £35+vat per additional category.

Non-Members - Entry is £35+vat per category (Entry fees will be deducted from your first year's membership costs, if you sign up for Food Drink Devon membership before 22 April 2022).

Silver Awards will be given to those entrants achieving 80-89%, Gold Awards to 90-99% and Platinum Awards to those achieving a faultless 100%.

RETAILER AWARDS

The Retailer Awards are open to all Devon based retail establishments. By entering you are agreeing to provide a voucher for £50 for our judges. If you wish to enter more than one category you are required to provide the necessary vouchers for each. All entrants will be visited by independent and unbiased expert judges during May, June or July 2022.

Outstanding establishments will be awarded Silver, Gold or Platinum awards. An independent adjudicator will verify the results and the overall winner of each category.

Entry Fee

Food Drink Devon Member - Entry is free for 1 category and then £35+vat per additional category.

Non-Members - Entry is £35+vat per category (Entry fees will be deducted from your first year's membership costs, if you sign up for Food Drink Devon membership before 22 April 2022).

Silver Awards will be given to those entrants achieving 80-89%, Gold Awards to 90-99% and Platinum Awards to those achieving a faultless 100%.

CHEF OF THE YEAR AWARDS

New for 2022 the Chef of the Year Awards are open to any Head Chef, Sous Chef or Private Chef who live and work in Devon. Judging will take place over 2 rounds and full details can be found in the briefing pack.

Entry Fee

Entry is £50+vat per Chef

Feedback reports will be available to all entrants for a small fee.

This year's final deadline for entries is Friday 22 April 2022. Judging will take place over the following three months, a shortlist of winners will be announced in August and the winners themselves at the awards ceremony taking place in October.

APPENDIX STRUCTURE

I. Canada

1. British Columbia
2. Alberta
3. Manitoba
4. Ontario
5. Quebec
6. Atlantic Canada

II. United Kingdom

1. English Regions
2. Wales
3. Scotland

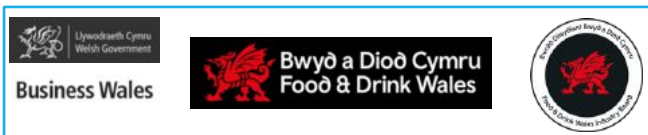
III. United States

1. California
2. Pacific Northwest
3. Midwest
4. Southeast
5. New Jersey

IV. Australia

1. Queensland
2. South Australia
3. Victoria

Food & Drink Wales is a government agency tasked with supporting the Welsh food industry



RESOURCES/PUBLICATIONS

- Newsletter
- Vision for the Food & Drink industry 2021
- Welsh F&B Progress Indicators
- Infographics
- “The Insight Programme” series of commissioned reports
- Online message board
- Social media (Facebook, LinkedIn, Twitter, YouTube, Instagram)

FUNDING MODEL/INCOME STREAMS

- Government funding
- Sponsorships

MEMBERSHIP FEES/CHARGES

Free membership to qualifying Welsh firms

PROFILE

As the Welsh Government, we are committed not just to helping those working in the industry, but to telling the good news story to consumers in Wales and further afield.

MISSION

The Food and Drink Wales Industry Board's purpose is to grow, promote and enhance the reputation of the Welsh food and drink industry.

ACTIVITIES/SERVICES

- Various grant schemes (e.g. Food Tourism and Culture Strategic Growth Grant Scheme)
 - Consultation papers
 - Management of protected food names in Wales
 - TasteWales trade event and conference
 - Publication of Welsh food recipes
 - Three Food innovation Centres (pilot plant)
 - Investment attraction
 - Trade development
 - Food Safety Schemes
- Members have exclusive access to:
- Further retail and research projects undertaken by the Food Policy division.
 - An extensive library of Kantar Worldpanel reports and other ad-hoc papers providing a wealth of tips and insight into the retail market.
 - The very latest help and advice from Food Clusters.
 - Peer knowledge and advice through our online message board.

DETAILS

NAME	Food & Drink Wales Food & Drink Industry Board
ADDRESS	Food Policy and Strategy Unit Welsh Government Rhodfa Padarn Llanbadarn Fawr Aberystwyth SY23 3UR WALES
PHONE	+44 (0) 3000 6 03000
EMAIL	FoodandDrinkConsultation@gov.wales
WEBSITE	https://businesswales.gov.wales/foodanddrink/ https://gov.wales/food-and-drink-wales-industry-board
# OF STAFF	N/A
# OF BOARD	11 (appears advisory)
# OF MEMBERS	N/A
FOUNDED	2010 (reorg)
COVERAGE	Food and beverage industry

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

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GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	AWARDING R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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How do they see their role? What do they do?

“About Us

We are the Welsh food and drink industry – and we’re proud of it! We are passionate about food and drink and work hard to support our producers and engage consumers in a way which embraces the environment and sustainability.

Food and drink in Wales - we love our food in Wales.
We love our industry!

The food and drink produced in Wales is outstanding, and it competes on the world stage. It’s our intention to keep it that way, and make it even better, supporting our fabulous producers and retailers in their efforts to tempt us with even more amazing creations.

As the Welsh Government, we are committed not just to helping those working in the industry, but to telling the good news story to consumers in Wales and further afield. We’ve already made great strides in showcasing Welsh produce – as our increasing export record testifies.

Passionate though we are in Wales, we are also responsible. Underlying all the work of making and distributing food and drink is a layer of solid policies which give proper prominence to food safety and standards, sustainable development and supporting the drive for food security.”

Food & Drink Wales website

What are some good ideas from this organisation?

1

DELIVER INDUSTRY RELEVANT MARKET RESEARCH

For example:

- Healthy Deserts in Great Britain
- UK Out of Home Food Review
- Protein and Plant-based: Purchase and Consumer Perspectives
- UK Market: Total Cheese Review
- The Shopper of the Future
- Who Cares? Who Does? Sustainability Report
- Switzerland Export Market Analysis

2

SUPPORT INDUSTRY CLUSTERS

For example:

- Welsh Seafood Cluster
- Fine Foods Wales Cluster
- NutriWales Cluster
- Drinks Development Cluster
- Horticulture Cluster
- Wales Honey Cluster
- The Sustainable Scale Up Cluster

3



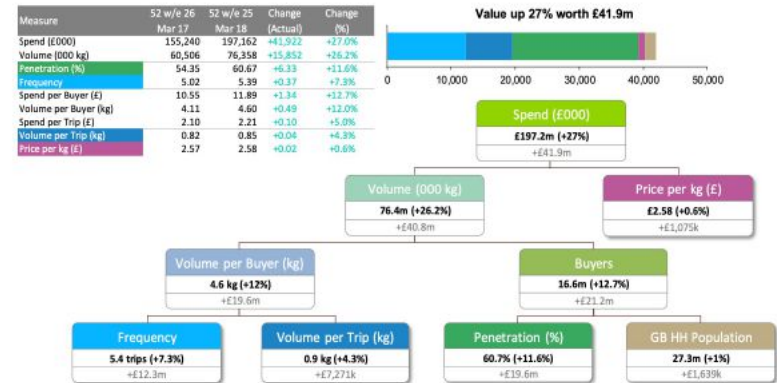
SUPPORT INDUSTRY TRAINING

The Food Skills Cymru programme delivered by Lantra supports businesses within the Welsh food and drink processing and manufacturing industry to ensure employees have the right skills and training for their business and the wider industry.

IDEA: FDW commissions market research to support regional firms



Healthy Ice Cream has seen strong growth from 2017, with all metrics up on the year, particularly penetration and frequency



KANTAR WLRDLPANEL

"Healthy Yoghurts" | Total GB | Measure Tree | 52 w/e 25th March 2018

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3. Midwest
4. Southeast
5. New Jersey

IV. Australia

1. Queensland
2. South Australia
3. Victoria

The Scotland Food & Drink Board is a quasi-government agency with strong industry support and paid membership



DETAILS

NAME	Scotland Food & Drink Board
ADDRESS	Ratho Park One 88 Glasgow Road Newbridge EH28 8PP
PHONE	+44 131 355 0940
EMAIL	info@foodanddrink.scot
WEBSITE	https://scotlandfoodanddrink.org
# OF STAFF	29
# OF BOARD	Board 10; Partnership Board 18
# OF MEMBERS	460+
FOUNDED	2007
COVERAGE	Food and beverage manufacturers, retailers, foodservice and trade organisations

RESOURCES/PUBLICATIONS

- Newsletter
- Industry Facts & Figures
- Ambition 2030 Strategy
- Sector strategies (e.g. Provenance & Profit: a strategy for Scotland's pig industry)
- Industry Toolkits (e.g. recruitment and retention toolkit)
- Seasonality calendar

FUNDING MODEL/INCOME STREAMS

- Government funding
- Membership fees

MEMBERSHIP FEES/CHARGES

Turnover	Membership fee
Up to £1 million	£685 + VAT
£1 - £5 million	£1,360 + VAT
£5 million plus	£2,040 + VAT

Large retailers, foodservice and trade organisations £5,655 + VAT

PROFILE

Scotland's food and drink products are unique but so too is Scotland Food & Drink. No other country in the world has created a body which facilitates and enables government and industry to work side by side. And the simple truth is it works. Emphatically. Since our formation in 2007 food and drink has become the best performing industry in Scotland. Today it's worth an incredible £15 billion.

MISSION

We are here to nurture, support and champion the people and products of Scotland's food and drink industry to help deliver continued and growing success. We are here to guide our members to realise untapped potential, to unlock new markets and maximise opportunities.

And we are committed to strengthening reputations, developing growth strategies and broadening networks which will deliver the competitive edge for our members and continued success for Scotland's food and drink industry.

ACTIVITIES/SERVICES

- Advice
- Mentoring
- Matchmaking
- Scotland Food & Drink Excellence Awards
- COVID-19 Hub
- Pandemic Recovery Plan

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
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FOOD & BEVERAGE INDUSTRY BODY ROLES THAT REQUIRE A LEVY (OR SIMILAR)

GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	AWARDING R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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How do they see their role? What do they do?

“We are the industry leadership organisation tasked with driving responsible growth for the sector and building Scotland’s global reputation as a Land of Food and Drink. We are led by the industry, supported by the Government and challenged to work across the whole industry.

We have two interlinked roles; we are a membership organisation with over 440 members at our heart and we lead the Scotland Food & Drink Partnership, a collaborative partnership of the key industry organisations and public sector agencies working in the industry in Scotland.

As the leader of the Scotland Food & Drink Partnership, we drive forward the industry strategy, *Ambition 2030*, which aims to double the value of the country’s farming, fishing, food and drink industry to £30 billion by 2030.

Led by the industry, supported by the Government and challenged to work across the whole industry, we bring everyone involved in the Scottish food and drink industry together to deliver a common and shared vision which will deliver greater success across the industry.

We are here to nurture, support and champion the people and products of Scotland’s food and drink industry to help deliver continued and growing success.

We are here to help the sector achieve its commercial ambitions.

And we are here to help you open doors, access markets and maximise opportunities.”

SF&D website

What are some good ideas from this organisation?

1



DELIVER INDUSTRY AWARDS

- Recognise the innovation and creativity that has come from companies, teams and individuals who, through their hard work and determination, are raising the bar and helping to build Scotland's reputation for Food and Drink
- The awards are open to all Scottish food and drink companies whose products are wholly or mainly produced, processed and packaged in Scotland.

2



OFFER INDUSTRY TRAINING

- The Academy is a unique, market-focused, and commercially orientated training programme that helps Scottish food and drink producers - at every stage of their growth journey - sell themselves, build their brands and thrive in grocery and foodservice markets.
- This unique series of structured training programmes is designed by market-focused industry experts to enable real and sustainable business growth. Underpinned by tailored one-to-one support, each programme matches the needs of your business with appropriate specialists and mentors.

3



DELIVER ACCESSIBLE INSIGHTS

For example:

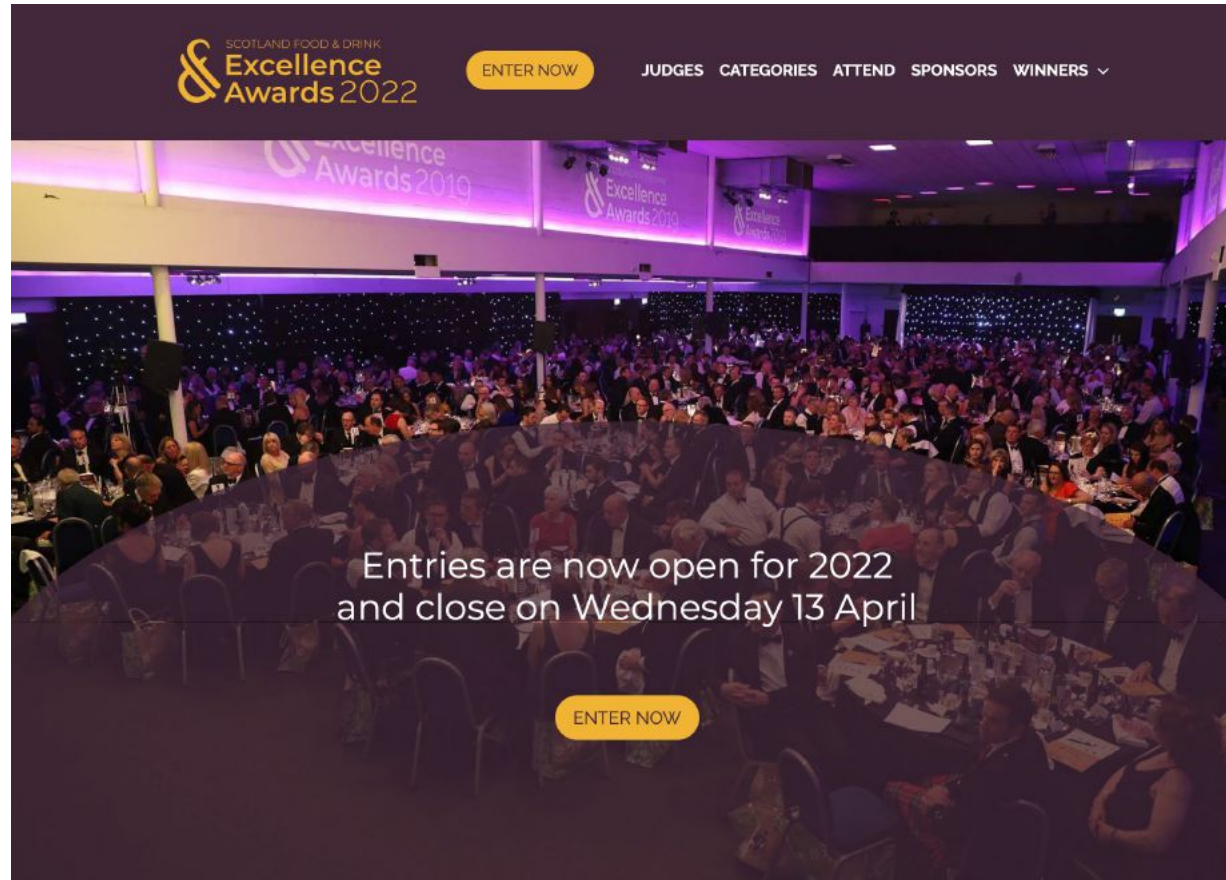
- Insights on consumer trends and shopper behaviour > An ideal platform for developing or reformulating products, updating your marketing, or talking to buyers
- Intelligence on markets, sectors and categories > Valuable for spotting opportunities or emerging competition, and steering your response or investments
- Webinars, reports and presentations > Practical insights on key topics from Health & Wellness to Sustainability provide new ideas and routemaps for tackling challenges and growth

IDEA: SFD is a “partnership comprising industry trade bodies, the Scottish Government, and other public sector bodies”



To be clear, Scotland has “Scotland Food & Drink Board” which leads the “Scotland Food & Drink Partnership”. The list here is the members of the wider partnership.

IDEA: SFDB runs the industry excellence awards



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2. Pacific Northwest
3. Midwest
4. Southeast
5. New Jersey

IV. Australia

1. Queensland
2. South Australia
3. Victoria

CLFP is a lobbying organisation focused on representing members' interests to government



DETAILS

NAME	California League Of Food Producers
ADDRESS	2485 Natomas Park Drive, Suite 550 Sacramento, CA 95833 UNITED STATES
PHONE	+1 916 640 8150
EMAIL	jackie@clfp.com
WEBSITE	https://www.clfp.com
# OF STAFF	N/A
# OF BOARD	40
# OF MEMBERS	2,000+
FOUNDED	1905
COVERAGE	Food producers, industry suppliers

RESOURCES/PUBLICATIONS

- CLFP Insider Newsletter
- CLFP Weekly News Brief
- CLFP Press Releases
- CLFP California Food Producer magazine
- CLFP Legislative Bill Tracker
- Find a Legislator
- CLFP Membership Directory

FUNDING MODEL/INCOME STREAMS

- Membership fees
- Advertising
- Sponsorships
- Conference fees

MEMBERSHIP FEES/CHARGES

Processor Member
Affiliate Member
Supplier Member

PROFILE

The California League of Food Producers (CLFP) has been the voice and the advocate for California's food-producing industry since 1905. CLFP represents the interests of large and small food processors and beverage producers throughout the state and works to help ensure a favorable and profitable business environment for its members and the entire food-producing industry.

MISSION

Together we can provide a more favorable environment for the strength and growth of the California food producing industry.

ACTIVITIES/SERVICES

- Advocacy and lobbying
- California Food Processing Expo
- Industry advice (e.g. CLFP Antitrust-Compliance-Guidelines)
- CLFP Member Connection University Scholarships (member donors)
- Annual Silent Auction & Reception
- Supplier Host Council Fall Golf Tournament and Raffle
- CLFP Scholarship Program
- Capitol Day (meetings with government)
- DC Fly-In (meetings with government)
- Association website is managed with specialised NoviAMS software (<https://www.noviams.com>)

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
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How do they see their role? What do they do?

“CLFP is the only statewide food processing organization in California focused specifically on protecting the interests of the food processing industry before all branches of state government. CLFP is also at the forefront in addressing the many regulatory issues facing the industry in a state with the most complex and challenging state regulatory environment in the U.S. CLFP is structured and staffed to help you effectively comply with requirements and plan for the future.”

CLFP maintains a daily presence in the halls of state government. When the Legislature is in session, our staff is actively analyzing proposed bills, providing detailed testimony, and meeting with lawmakers to explain the ramifications of their actions on the state’s food processing industry. The focus is on ensuring that your concerns are heard in the Capitol.”

CFP website

“CLFP is your advocate in Sacramento, monitoring and analyzing key legislation and regulations and effectively representing your interests. We are your “eyes and ears” in the Capitol and your go-to resource for a wide range of issues. To be most effective in the public policy arena, the food processing industry must work together. We need your voice and participation in CLFP.”

As a member of CLFP, you will have opportunities to meet with your peers who are working for some of the finest food companies in the world. The exchange of ideas and information among our members is one of the valuable benefits of participation in this association.”

CFP website

What are some good ideas from this organisation?

1



Food Processing
Expo

DELIVER AN
INDUSTRY EXPO

- The Expo, the largest event of its kind in California, attracts a wide variety of attendees, including CLFP member food processors, non-member processors, those with ideas for new food products, university personnel and students, food processing industry vendors, suppliers and more.

2



DELIVER A SERIES OF
INDUSTRY RELEVANT
WEBINARS

For example:

- Sustainable Groundwater Management Act (SGMA) Webinar
- Pesticide MRLs & Food Tolerances: Regulations & Testing 101
- Food Processing: Meeting the Demand for Increased Carbon Reductions
- The Agriculture Export Crisis: Who and What Caused It? Why Does it Continue? What Are the Solutions?
- Microgrids: On Site Generation for Food Processors

3



PUBLISH AN
INDUSTRY MAGAZINE

CLFP's California Food Producer magazine is published in the spring/summer and fall/winter and distributed to 2,000 plus food processing and allied industry members.

Each issue has a specific theme and features interviews, articles and updates on industry issues and CLFP activities. Advertising in the California Food Producer is an excellent way for allied industry members to reach food processors.

IDEA: CLFP has a large lobbying agenda

- ⇒ **During COVID-19** CLFP helped facilitate providing its processor members with free face masks and shields and hand sanitizer from the California Office of Emergency Services. The products were valued at approximately \$2 million.
- ⇒ **CLFP has assisted multiple processor members** in obtaining funds for plant improvement projects from the California Energy Commission's Food Production Investment Program.
- ⇒ **CLFP is leading a statewide business coalition** regarding regulatory reform to ensure agencies adhere to established administrative procedures, use a transparent rulemaking process, base decisions on facts and applied knowledge, and conduct thorough economic impact analysis when developing new regulations.
- ⇒ **CLFP has been actively representing the interests of food processors** regarding the California Air Resources Board's new greenhouse gas climate change regulations.
- ⇒ **CLFP actively partners with the state's energy utilities and with the California Energy Commission** to promote energy research projects and support well-funded energy-efficiency programs and energy grant programs benefitting food processors.
- ⇒ **CLFP has been leading a statewide industry coalition** to oppose onerous and unreasonable new storm water permit regulations proposed by the State Water Board.
- ⇒ **CLFP works with the Board of Equalization** to resolve tax issues affecting food processors.
- ⇒ **CLFP continues to actively engage at both the legislature and the state's regulatory agencies on goods movement issues impacting food processors.** Ongoing issues are truck weight reform, driver shortages and licensing, transport refrigeration unit regulations and federal hours-of-service regulation for seasonal agricultural haulers.
- ⇒ **CLFP in coalition with other industry organizations has been successful to date in keeping plastic and recycling legislation from moving forward.** The two bills would create unprecedented product regulation in California that will increase costs.
- ⇒ **CLFP actively participates in rate proceedings and other regulatory matters before the California Public Utilities Commission** continuing the fight for fair and reasonable rates for food processors.
- ⇒ **CLFP works closely with the San Joaquin Valley Air Pollution Control District** on emissions and permitting issues affecting CLFP's food processors based in this Valley, actively representing them in the development of regulations, permitting, and reporting requirements, and working to ensure that all regulations are technologically feasible and cost-effective and firmly based in sound science.
- ⇒ **CLFP has worked closely with the San Joaquin Valley Air Pollution Control District** to ensure new boiler emissions regulations are based on sound science and can be implemented in a cost-effective manner.
- ⇒ **CLFP continues to press the legislature and regulatory agencies** to ensure the taxes and fees assessed on food processors are fair and consistent.
- ⇒ **CLFP has been instrumental in ensuring that the California Air Resources Board's** ongoing and increasingly stringent greenhouse gas, climate change and Cap-and-Trade programs acknowledge and address the unique characteristics of the food processing industry in its regulations.
- ⇒ **CLFP partners with energy utilities and the California Energy Commission** to promote energy research projects and help processors participate in energy-efficiency programs.
- ⇒ **CLFP actively monitors OSHA and labor regulations.**

APPENDIX STRUCTURE

I. Canada

1. British Columbia
2. Alberta
3. Manitoba
4. Ontario
5. Quebec
6. Atlantic Canada

II. United Kingdom

1. English Regions
2. Wales
3. Scotland

III. United States

1. California
2. Pacific Northwest
3. Midwest
4. Southeast
5. New Jersey

IV. Australia

1. Queensland
2. South Australia
3. Victoria

Food Northwest supports food processors across three states in the Pacific Northwest



DETAILS

NAME	Food Northwest
ADDRESS	8338 NE Alderwood Rd; Suite 160 Portland, OR 97220 United States
PHONE	+1 (503) 327-2200
EMAIL	kirsten@foodnw.org
WEBSITE	https://www.foodnorthwest.org
# OF STAFF	4
# OF BOARD	16
# OF MEMBERS	150+ processor member companies 300+ supplier members
FOUNDED	1914 (as Northwest Cannery Association)
COVERAGE	Our members include international brand names, producers of private label and institutional products, well-regarded regional brands, and locally-run family businesses.

RESOURCES/PUBLICATIONS

- Print and online publications
- Job board
- Guidelines (e.g. Listeria Control Checklist for Frozen Vegetable Operations)
- Public policy position papers
- Printed Membership Directory and Resource Guide
- Online Membership database (processors and supplier members)
- Industry newsletters (email & print)
- Food & Beverage Industry Roadmap (co-funder)

FUNDING MODEL/INCOME STREAMS

- Not profit
- Membership feed
- Event fees
- Advertising & sponsorships

MEMBERSHIP FEES/CHARGES

Processor (variable based on revenue)
Supplier (US\$595/year)

PROFILE

Established in 1914 and headquartered in Portland, Oregon, Food Northwest is one of the nation's largest food processing trade associations. Food Northwest's membership includes over 150 food processing facilities in Washington, Oregon, and Idaho as well as over 300 member suppliers of goods and services to the industry. Food Northwest's members include national companies with operations or headquarters in the Pacific Northwest, regional companies and locally-run family businesses, and affiliate members located outside the Northwest. Northwest food processors are nationally recognized for their leadership and efforts to promote sustainability, to become more energy efficient, and to reduce greenhouse gas emissions levels.

MISSION

Food Northwest is a trade association organized to advance the ability of the food industry to produce and deliver wholesome, safe food from the Pacific Northwest to the world.

ACTIVITIES/SERVICES

- Authoritative voice for the food processing industry
- Advocacy, training, issue management, exclusive events, professional development, and leadership opportunities
- Food Northwest Process & Packaging Expo
- Food Northwest Leadership Summit
- Workshops (e.g. Food Safety & Sanitation: Basics of Sanitation Workshop)

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT REQUIRE A LEVY (OR SIMILAR)

GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	AWARDING R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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How do they see their role? What do they do?

“Food Northwest is a trade association organized to advance the ability of the food industry to produce and deliver wholesome, safe food from the Pacific Northwest to the world. We advance our success in feeding the world through advocacy, education and peer collaboration. Our government affairs program is the cornerstone of our advocacy work. Our Public Policy Positions document, developed by the food companies, serves as a guide and resource and assists us in navigating the legislative and regulatory environments.”

Food Northwest Public Policy Positions, July 2016

What are some good ideas from this organisation?

1



RUN A LEADERSHIP SUMMIT

- Representatives from Food Northwest processor member companies are invited to a special retreat to expand their knowledge on what it takes to be an influential leader.
- The event focuses on challenging perceptions of business leadership, networking, and building relationships.
- Location: Skamania Lodge, Stevenson, WA
- Date: October, 5 - 7, 2022

2



DELIVER A PROCESSING & PACKAGING EXPO

Food Northwest Process & Packaging Expo is back! Mark your calendar to attend the largest regional food processing show. Expanded educational offerings with a focus on best practices and continuous improvement will encompass technical, energy, sustainability, environmental, and policy issues. Attendees include every sector of the food industry including fresh, dry, packaged, canned, frozen, beverage, dairy, bakery, fish, seafood, meat, produce and specialty, as well as suppliers that support the industry. The expo showcases cutting-edge technology, production line equipment, packaging, hygiene, and construction services.

3



SUPPORT THE NEXT GENERATION OF INDUSTRY LEADERS

- Skilled employees are a key asset and vital to the success of any business operation. The food industry identified the inability to find workers with the necessary skills as a major challenge for the industry. Thousands of positions throughout the Northwest states remain unfilled. ERI was founded to assist the industry in addressing this critical need.
- Endowment fund provide scholarship awards for students pursuing studies relevant to food manufacturing at accredited educational and vocational institutions in Idaho, Oregon, and Washington

IDEA: In 2020, Food Northwest delivered a range of virtual courses to employees of member organisations

In 2020 we are offering the following **VIRTUAL** courses:

FSMA Preventive Controls for Human Food	Ammonia and RETA (Partnerships with ASTI & RETA)
FSMA Intentional Adulteration	BPCS
Internal Auditing	Advanced HACCP
Sanitation Skills	Sanitary Design
Root Cause Analysis	Basic HACCP
OSHA	Implementing SQF code v9
Lean Training/Six Sigma	Leadership in Manufacturing

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4. Southeast
5. New Jersey

IV. Australia

1. Queensland
2. South Australia
3. Victoria

The Midwest Food Products Association supports food producers across three states in the American Midwest



DETAILS

NAME	Midwest Food Products Association
ADDRESS	4600 American Pkwy, Suite 210 Madison, WI 53718-8334 UNITED STATES
PHONE	+1 608 255 9946
EMAIL	jane.algiers@mwfpa.org
WEBSITE	https://mwfpa.org
# OF STAFF	3 (most work completed by committees run by volunteers from members)
# OF BOARD	16 (14 processors; 2 suppliers)
# OF MEMBERS	288 members (5% processors; 95% associate members)
FOUNDED	1905
COVERAGE	"Food products" and associated industry suppliers

RESOURCES/PUBLICATIONS

- Newsletter
- InfoHub Members directory
- Annual wage survey
- Social media (Facebook, Twitter, LinkedIn)
- Annual report

FUNDING MODEL/INCOME STREAMS

- Annual budget US\$800,000
- Processor dues 31%
- Associate dues 10%
- Convention 37%
- Seminars/education 11%
- Research contributions 10%
- Miscellaneous 1%

MEMBERSHIP FEES/CHARGES

Processing member (based on turnover)
 Associate Member \$475/year
 Artisan Processor Member \$500/year
 Ingredient Processing Member \$200/year

PROFILE

The Midwest Food Products Association, Inc. is a trade association that advocates on behalf of food processing companies and affiliated industries in Illinois, Minnesota, and Wisconsin. The association represents a diverse group of food processors on a variety of food issues. The primary role of MWFPA is to influence public policy and make the Midwest a great place for food processors to do business.

MISSION

To enhance and promote the business interests of the Midwest food products industry, to be the foremost recognizable legislative voice in the three-state area espousing the objectives and concerns of the food/vegetable processing industry, involve members in association activities and promote activities which assure the safety, quality, and nutrition of our member's products. Our activities can be summarized in four words; advocate, educate, communicate, and facilitate.

ACTIVITIES/SERVICES

- "your advocate, monitoring and analyzing key legislation and regulations and effectively representing our interests"
- "We are your eyes and ears in the Capitol."
- Workshops and seminars
- Convention and trade show
- MWFPA Scholarship funds
- Group buying of insurance
- Annual golf outing and annual sporting clays challenge (fundraiser for scholarships)

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT REQUIRE A LEVY (OR SIMILAR)

GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	AWARDING R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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How do they see their role? What do they do?

“In my short time with the Association, I have been impressed with MWFPA’s achievements, thanks to the commitment of its Board of Directors, volunteer committee members, and professional staff focused on providing effective advocacy and value to our members.

MWFPA’s programming provides meaningful learning and networking experiences, funds educational scholarships and agricultural research, and publishes an annual directory and wage survey. The Association has aggressively worked with state and federal legislators and regulators to develop and improve the legal and regulatory environment impacting food manufacturing in the Midwest.”

Jason Culotta, newly appointed President, MWFPA

What are some good ideas from this organisation?

1

DELIVER A RANGE OF INDUSTRY TRAINING

- Annual Convention – 19 Learning Sessions
- Processing Crops Conference
- OSHA 10-Hour Safety Compliance Training
- Energy Efficiency Seminar
- High Performance Leadership Seminar

2

AWARD SCHOLARSHIPS TO UNIVERSITY STUDENTS

- University students studying food science or agriculture
- Funded by organisation fundraising events and donations
- “Generous financial contributions received from MWFPA members through voluntary dues check-off, the Annual Sporting Clays Challenge, challenge holes at the Spring Scramble and the Silent Auction allow us to offer assistance to deserving students.”

3

CONDUCT BUSINESS RELEVANT ANNUAL SURVEYS

- ANNUAL WAGE SURVEY: Available to those members who participate in the survey, the annual wage survey presents compensation and employment data for full time and seasonal employees from members.
- SAFETY COMPETITION: A safety contest, based on OSHA data collected from food processing plants, is conducted by MWFPA, with monthly reports of incident rates for participating plants. Awards are presented to contest winners at the Annual Convention.

IDEA: MWFPFA runs industry social events that raise money for university scholarships

MWFPFA hosted its annual golf outing, the Spring Summit & Scramble, at Trappers Turn in Wisconsin Dells. This event brought over 200 members together for meetings, a day of golf, and a reception. Sponsors and golfers helped raise \$3,000 for the MWFPFA Scholarship Fund



\$12,000!

Association Members

+Events

+Donations

Success

Networking

The Annual Sporting Clays Challenge and Scholarship Fundraiser was held in Johnson Creek, WI this year. It raised \$9,000 at the event for scholarships, thanks to the generosity of our sponsors and more than 60 industry professionals in attendance.



ANNUAL SPRING SUMMIT & SCRAMBLE

Alliant Energy
Applied Science
Ardagh Group
Axley Brynelson LLP
Ball Metalpack
Bonduelle USA
ChemStation
Crites Seed
Crown Cork & Seal USA
Deville Technologies
Ellingson Companies
Faribault Foods
Hays Companies
Harris Moran

Hydrite Chemical
Hydrotex
JAX
Key Technology
Langguth America Ltd.
Lubriplate Lubricants Co.
Lycy Manufacturing
Nelson-Jameson.
Oxbo International Corporation
Plainfield Trucking
ProActive Solutions USA, LLC
ProEx Food, LLC
RSM USA
Seminis/Bayer

**2019
Sponsors**

Seneca Foods
Silgan Containers
Summit Refrigeration Group
Syngenta
T H Agri-Chemicals

ANNUAL SPORTING CLAYS CHALLENGE & SCHOLARSHIP FUNDRAISER

Ball Metalpack
Chippewa Valley Bean
Faribault Foods
Harris Moran Seed Company

Lakeside Foods
Lycy Manufacturing
Pearl Engineering
Pure Line Seed Company

Seneca Foods
Silgan Containers
Syngenta

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3. Midwest
4. Southeast
5. New Jersey

IV. Australia

1. Queensland
2. South Australia
3. Victoria

Southeastern Food Processors supports and represents member firms



DETAILS	
NAME	Southeastern Food Processors Assn.
ADDRESS	22 Triplett Court Dillsburg, PA 17019 UNITED STATES
PHONE	+1 717 329 8421
EMAIL	ksrentzel@aol.com
WEBSITE	https://sfpafood.org
# OF STAFF	1
# OF BOARD	13
# OF MEMBERS	200+
FOUNDED	1942
COVERAGE	Membership is available to businesses engaged in food processing and retailing as food processor members. Associate memberships are also available to suppliers to these processors.

RESOURCES/PUBLICATIONS

- Food Forum Quarterly Newsletter
- Members list

FUNDING MODEL/INCOME STREAMS

- Membership fees
- Convention fees
- Sponsorships
- Social events

MEMBERSHIP FEES/CHARGES

Associate \$400 Annually
 Consultant \$400 Annually
 Processor \$400 Annually

PROFILE

SFPA is the leading voice of the food processing industry in the Southeast. It promotes and provides information to its members on government and agency regulations, technical matters, education, and general food processing industry affairs.

MISSION

To provide a forum in which members of the food industry in the Southeastern United States will be provided the opportunity to seek solutions in the management of business in this unique segment of the industry.

ACTIVITIES/SERVICES

- Networking opportunities to advance food processing operators and suppliers throughout the year and especially during the SFPA's annual convention.
- Industry information is provided during association events and via communications shared through a quarterly newsletter, our website and via social media. Information on FDA regulations, human resources, farm practices, marketing, packaging, and plant operations is provided.
- Educational opportunities for management during the annual convention and plant personnel on food safety and plant operations during the annual SFPA University Workshop
- College scholarship opportunities for children of SFPA member companies.
- Annual convention at some of the South's most beautiful destinations. The conventions offer education, networking and career enrichment opportunities for its members.

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT REQUIRE A LEVY (OR SIMILAR)

GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	AWARDING R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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How do they see their role? What do they do?

“Established in 1942, the Southeast Food Processors Association (SFPA) is the leading voice of the food processing industry in the Southeast. The SFPA promotes and provides information to its members on government and agency regulations, technical matters, education, and general food processing industry affairs. Food processor membership is open to all food processors either located in, or providing services to food processors in the southeast. Associate membership is open to all affiliated industries serving the food processing industry.

Information Provided – Important information is provided to members on legislation and administrative rulings affecting the industry, on SFPA activities and events, and on other news important to our industry. Information regarding the industry is also supplied to news media. Key insights are likewise provided during the association’s annual convention during general sessions and workshops.

Technical Education Program – SFPA University is a unique and low-cost educational workshop for member plant personnel. Plant safety, FDA regulations, SQF certification and personnel management are topics typically provided from industry experts.

Scholarship Program – Supporting the many SFPA member employee families, college scholarships of up to \$2,000 are offered each year to the children of member employees who are selected from their applications by a review board. A second scholarship is available to students already enrolled in Food Science programs a several southern land grant universities.

Networking/Annual Convention – SFPA members are dedicated to supporting fellow members through networking opportunities provided at the association’s annual convention,

including a golf tournament, receptions and galas, and exhibits offered to associate members during the convention.

Publications/Communications – A quarterly newsletter, Food Forum, is provided to members on legislation and administrative rulings affecting the industry, on SFPA activities and events, and on other news important to our industry. The newsletter is provided to its members electronically and in print upon request. A website (SFPAFood.org) and social media (facebook.com/MySFPA).

Membership – Membership is available to businesses engaged in food processing and retailing as food processor members. Associate memberships are also available to suppliers to these processors. An annual membership fee of \$400 is required.”

SFPA website

What are some good ideas from this organisation?

1



DELIVER A TRAINING “UNIVERSITY”

- Run by Clemson University
- Each year, SFPA University offers one-of-a-kind education on improving plant operations, food safety, workplace relations and other key metrics for member companies as well as non-members.
- The training is optimized for learning by using industry experts. The day-and-a-half event is considered the best way to provide operational training for the money.
- \$175 for non-members and \$125 for member company personnel.

2

RUN AN ANNUAL CONVENTION

- Annual business meeting
- Industry speakers
- Motivational speakers
- Business speakers
- Golf tournament
- Reception and dinner
- Scholarship awards
- Silent auction

3

AWARD UNIVERSITY SCHOLARSHIPS

For example:

- The SFPA Food Science scholarship is for majors in Food Science or related fields of study at the following universities: University of Tennessee, University of Georgia, University of Alabama, Clemson University, North Carolina State University or Virginia Tech.

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4. Southeast
5. New Jersey

IV. Australia

1. Queensland
2. South Australia
3. Victoria

The New Jersey Food Processors Association has been around for almost 100 years and delivers on industry training and networking



DETAILS

NAME	New Jersey Food Processors Assn.
ADDRESS	405 N Stanwick Road Moorestown, NJ, 08057 UNITED STATES
PHONE	+1 888 859 8832
EMAIL	help@njfoodprocessors.org
WEBSITE	https://www.njfoodprocessors.org
# OF STAFF	2
# OF BOARD	12
# OF MEMBERS	N/A
FOUNDED	1904/1934
COVERAGE	Food and beverage companies, suppliers and service organizations

RESOURCES/PUBLICATIONS

- NJFPA Newsletter
- NJFPA Food Forum Podcast
- NJFPA YouTube Channel
- NJFPA members directory
- NJFPA Job Board

FUNDING MODEL/INCOME STREAMS

- Membership fees
- Sponsorships
- Advertising
- Job Listing fees
- Other revenue
- NJFPA is Professionally Managed by TVD Associates (<http://tvdassociates.com>)

MEMBERSHIP FEES/CHARGES

Membership is divided into two categories. In the food processors category, dues are \$400 for large processors and \$200 for small. In the associate member category, the dues are \$400.

PROFILE

Members of the NJFPA have access to the resources necessary to strengthen their companies, are able to network at a number of association events and can participate in different committees where they can learn about best practices in their areas of expertise. NJFPA offers information on food safety strategies, technology innovations, a host of sales and marketing tips, and other topics featured on the website, at our annual conference, and in our electronic newsletters.

MISSION

The New Jersey Food Processors Association (NJFPA), a community of food and beverage companies, suppliers and service organizations that promotes industry growth throughout the Garden State region through education, resource sharing and strong member partnerships.

ACTIVITIES/SERVICES

- NJFPA Annual Spring Conference
- Educational Seminars/Webinars
- Industry roundtables on current topics
- Industry “fireside chats” with industry leaders
- Negotiated discounts for members
- Networking events (e.g. bowling, golf outing)
- NJFPA “On The Road” networking series around the state at members sites (e.g. River Horse Brewing Company)
- NJ Food Manufacturers Benchmarking Survey
- Partnership with The Food Innovation Center at Rutgers University (FIC) for training and consultation
- NJFPA Scholarship Fund and Golf Outing Charity Recipient

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
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GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	AWARDING R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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How do they see their role? What do they do?

“The New Jersey Food Processors Association (NJFPA), a community of food and beverage companies, suppliers and service organizations that promotes industry growth throughout the Garden State region through education, resource sharing and strong member partnerships.

Members of the NJFPA have access to the resources necessary to strengthen their companies, are able to network at a number of association events and can participate in different committees where they can learn about best practices in their areas of expertise. The NJFPA holds an Annual Conference, usually in Spring, which is a great way to network and gain important new information affecting the industry, including technical innovations,

sales and marketing tips, consumer trends, distribution solutions, new product and package development, and food safety issues. Read more details on the many benefits of membership.

The Association is led by the Board of Directors, who are elected at the Annual Conference to serve 2-year terms. All members are encouraged to take part in our Committees, which is a great way to network and help determine the focus of the Association. Your questions, comments and suggestions are important to us. Please feel free to contact us with your thoughts and concerns.”

NJFPA website

What are some good ideas from this organisation?

1

NEGOTIATE DISCOUNTS FOR MEMBERS

- Training courses
- Pest control
- Business valuation
- Workers compensation insurance
- Dental insurance

2



DELIVER REGIONAL SOCIAL EVENTS AT MEMBER SITES

- NJFPA's popular On the Road (OTR) networking series has always been about making and strengthening connections. NJFPA provides the dinner, drinks, and fabulous locations throughout the Garden State, but it is the members you meet that will pay dividends for the rest of your life.
- Cedar Rose Vineyards, Millville, NJ; Tuesday, September 21st 2020 at 5:30 pm
- River Horse Brewing Company, Ewing, NJ; Thursday, November 18th 2020 at 5:30 pm

3



DELIVER INDUSTRY RELEVANT PODCASTS

This series will focus on stories about the people changing the face of the food processing in the Garden State through innovation, hard work and lending a caring hand. The NJFPA will endeavor to tell the stories that might now get attention in other mainstream channels.

If this series inspires and provides actionable ideas, it will achieve its aims.

IDEA: NJFPA offer regular podcasts on industry topics, often involving discussions with organisation members

S2 Episode 5 - Everyone has something to teach you: A Conversation with Jessica Schwabach



Feb 8, 2022

Welcome to the fifth episode of Season 2 of the NJFPA Stradley Ronon Food Forum Podcast. In this episode, **Craig Peck**, Senior Manager of Business Development at **Rutgers Food Innovation Center**, speaks with **Jessica Schwabach**, co-founder and CEO of **Sundial Foods**. They talk about cutting-edge technology, plant-based foods,...

[Read More](#)

S2 Episode 4 - Plan, Pivot, Prosper, Repeat. A Conversation with Luke Bowen



Nov 23, 2021

Welcome to the fourth episode of Season 2 of the NJFPA Stradley Ronon Food Forum Podcast. In this episode, **Bill Mandia**, Partner at **Stradley Ronon Stevens & Young**, speaks with **Luke Bowen**, co-founder and president of **Evil Genius Brewing**. They talk about the many surprises and pivots along his professional journey.

Guest...

[Read More](#)

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2. Pacific Northwest
3. Midwest
4. Southeast
5. New Jersey

IV. Australia

1. Queensland
2. South Australia
3. Victoria

FIAQ supports the Queensland food processing/manufacturing industry



Food Industries Association of Queensland Inc.

DETAILS

NAME	Food Industries Association Queensland
ADDRESS	375 Wickham Tce, Spring Hill, Queensland, 4000 AUSTRALIA
PHONE	1 300 660 243
EMAIL	info@foodindustries.com.au
WEBSITE	https://foodindustries.com.au
# OF STAFF	All volunteer
# OF BOARD	N/A
# OF MEMBERS	N/A
FOUNDED	1948 (as Food Technology Association of Queensland); 2000 to FIAQ
COVERAGE	Food manufacturers

RESOURCES/PUBLICATIONS

- Blog
- Newsletter
- Members directory
- FIAQ Podcasts

FUNDING MODEL/INCOME STREAMS

- "FIAQ is a not for profit organisation led by industry members and governed by an experienced committee of experienced food industry professionals"
- Membership fees
- Event fees
- Sponsorships

MEMBERSHIP FEES/CHARGES

Student (full time study)	\$36.32
Individual	\$44.00
Organisations with 1-9 staff	\$69.68
Organisations with 10-20 staff	\$115.52
Organisations with >20 staff	\$205.32

PROFILE

FIAQ aims to offer value and prospects for members by providing the opportunity to connect with services and advice they need to develop their businesses, and to attend a variety of on topic food manufacturing events to learn, keep up to date with market trends and connect with new markets by networking.

MISSION

Our goal is to provide our members with the knowledge to give their business a competitive edge to enhance and grow their businesses efficiently and competently. FIAQ's role is to support all aspects of Queensland food manufacturing:

- Independent – run by the food industry for the food industry
- Relevant, current and topical
- Community – bringing the industry together
- The voice for the industry
- Fun!

ACTIVITIES/SERVICES

- Advocacy
- Seminars
- Jobs board
- FIAQ Christmas Party
- Gateway to Industry Schools Program (support/participate)

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
COORDINATION & NEGOTIATION	LOBBYING & ADVOCACY	JOINT BUYING OR DISCOUNTS	WEBINARS & WORKSHOPS	TRAINING & SKILLS DEVELOPMENT	HOMESTUDY PROGRAMS
INTERPRETATION OF LEGISLATION	CALLING FOR ACTION	VOICE OF THE INDUSTRY	INDUSTRY CONFERENCES	PRESENTATIONS & SEMINARS	GUIDES & PUBLICATIONS
JOINT MARKET RESEARCH	COLLABORATIVE MARKETING	JOINT IN-STORE PROMOTIONS	NEWSLETTERS & MAGAZINE	TRADESHOWS	MEET THE BUYER EVENTS
ATTRACTING NEW EMPLOYEES	MARKETING & POSITIONING	CONSUMER FACING DIRECTORY	INDUSTRY-FACING DIRECTORY	NETWORKING & PROMOTION	REGIONAL MEETUPS
INDUSTRY RECIPE BOOKS	WINDOW OR ON-PACK STICKERS	CONSUMER-FACING AWARDS	INDUSTRY-FACING AWARDS	INDUSTRY LEADERS ROUNDTABLE	SOCIAL EVENTS

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT REQUIRE A LEVY (OR SIMILAR)

GOVERNMENT MANDATED	COLLECTING LEVIES	JOINT INDUSTRY MARKETING	SETTING R&D PRIORITIES	AWARDING R&D FUNDING & GRANTS	MANAGEMENT OF SHARED RESOURCE
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FIAQ had to “reinvent” itself when the Australian Food & Grocery Council (AFGC) was formed; “kindred” associations in NSW, VIC and SA failed

“Our History

- FIAQ began as the Food Technology Association of Queensland (FTA – Queensland) in 1948, with 38 member companies, many of which were the largest food manufacturers in the state and the management committee was made up of CEO’s of those companies.
- There were various sub committees, these were Pure Food Regulations sub-committee, Taste panel sub-committee and the Technical Program sub-committee.
- The association secretariat was part of the Queensland Chamber of Manufacturers
- The Council of Australian Food Technology Associations (CAFTA) represented & co-ordinated all of the state food associations and its management committee was made up of representatives from each of the state associations
- CAFTA & state FTA’s were “designed to promote the scientific and technical aspects of the Food Manufacturing Industries in Australia
- CAFTA published a journal “Food Technology in Australia” which was well regarded for many years in the food industry. The journal became a cooperative publication when AIFST was formed in 1967 and is now known as Food Australia and is published solely by AIFST.

- When the AFGC was formed in 1995, consisting of many of the large and international food companies operating in Australia, CAFTA lost much of it’s large member base and was no longer viable.
- The state FTA’s in NSW and SA ceased also at this time, however Queensland and Victoria had enough financial resources and members to be able to service many of the SME’s in their states.
- In 2000 FTA Queensland changed its name to Food Industries Association of Queensland Inc (FIAQ) but has continued to operate with the same charter as was originally envisaged by the founding members 70+ years ago.
- There were kindred associations in NSW, VIC & SA”

FIAQ website

What are some good ideas from this organisation?

1

ORGANISE A RANGE OF SOCIAL EVENTS

- FIAQ Christmas Party 2021 featuring mini golf and Pictionary
- FIAQ Christmas Party 2020 featuring bowls and Pictionary

2

DELIVER RELEVANT SEMINARS

For example:

- Sensory Sensations
- Frontline Food Safety
- Continuous improvement / lean manufacturing
- Food industry engineering
- Quality assurance management
- Poultry quality assurance

3

ORGANISE AN ANNUAL CONFERENCE

FIAQ Annual Queensland Food Safety Conference

Brisbane Convention & Exhibition Centre

Prices:

- Students \$90
- Non-members \$378
- Members \$288

IDEA: FIAQ organises an annual conference



**15th Annual Queensland
Food Safety Conference**
The Real Story on...

True tales of foods fails

Register Online

Food Industries Association of Queensland Inc Annual Queensland Food Safety Conference, is taking place at the Brisbane Convention & Exhibition Centre, on Monday 29th July 2019.

We are delighted to confirm **Dr Jeanette Young** speaking on the Queensland Strawberry Contamination including a case study



Dr Liz Barbour, as CEO of Cooperative Research Council for Honey Bee Products Australia, will explore Honey Fraud: Technological Answers to a Sticky Issue

We are also pleased to confirm **John Bates** discussing Public Health Microbiology – A Life Well Lived! And **Margaret Balfour** (on behalf of BCC investigative unit) talking about the Case Study: Melbourne Cup Salmonella Outbreak of 2013

Julian Cox will be presenting on the "Big Two" putting Salmonella and Campylobacter: Australia's under the Microscope



Professor Julian Cox

Lisa Tomassen will be delivering a conference presentation on DNA Barcoding: Invisible Signature for Food Integrity!

Tracey Cooper will be answering our questions on QA Culture Change Management: Improving Food Safety

Please click here to receive the program, including the key topics, confirmed speakers by email>> [Program](#)



10% Early Bird Discount:

FIAQ Member discounted price: **\$288.00**
Non-Member discounted price: **\$378.00**
Student discounted price: **\$90.00**

Prices are excluding GST

Only Valid until 30th May 2019

[Register Here](#)

Partnership Opportunities

Gain direct access to the senior level audience through enhanced visibility and exposure to attract new business. A wide range of opportunities are available, for more information

 [Debbie Gordon](#)

1300 660 243

www.fiaq.com.au

APPENDIX STRUCTURE

I. Canada

1. British Columbia
2. Alberta
3. Manitoba
4. Ontario
5. Quebec
6. Atlantic Canada

II. United Kingdom

1. English Regions
2. Wales
3. Scotland

III. United States

1. California
2. Pacific Northwest
3. Midwest
4. Southeast
5. New Jersey

IV. Australia

1. Queensland
2. South Australia
3. Victoria

Food South Australia is a peak industry body with strong support from government and industry; a huge range of roles, activities and responsibilities



DETAILS	
NAME	Food South Australia
ADDRESS	Plant Research Centre, Waite Campus 2b Hartley Grove, Urrbrae SA 5064 AUSTRALIA
PHONE	+61 8 8303 9435
EMAIL	contact@foodsa.com.au
WEBSITE	https://www.foodsouthaustralia.com.au https://safoodbeveexporthub.com.au https://eatlocalsa.com.au https://ichoosesa.showcasesa.com.au
# OF STAFF	10 in SA + Japan & China
# OF BOARD	12
# OF MEMBERS	315
FOUNDED	2010 through the merger of long running industry associations - Food Adelaide and Flavour SA
COVERAGE	Food & Beverage industry (incl. wine excl. other alcoholic beverages)

RESOURCES/PUBLICATIONS
<ul style="list-style-type: none"> - Food SA Industry Updates - Press releases - Members Directory - SA F&B Industry Census - Jobs board

FUNDING MODEL/INCOME STREAMS
<ul style="list-style-type: none"> - 40% Government (State and Federal) - 60% Membership Fees, Sponsorship, Events) - Budget varies \$2-3m annually (depending on events) - Incorporated Association with funding from industry and State and Federal Government. Funding Deed with SA Dept of Trade and Investment to provide to provide programs and activities to support industry-wide growth. - Sponsorships key to major events

MEMBERSHIP FEES/CHARGES
<ul style="list-style-type: none"> - \$500-\$80,000/yr

PROFILE
<p>Food South Australia is the state's peak body for the food and beverage industry in South Australia. We are membership-based and the trusted partner of food and beverage manufacturing, processing and producing businesses of all sizes and stages, working with our members to grow markets, business capability and capacity, and industry connections.</p>

MISSION
<p>Our mission is to support and sustain the state's food and beverage industry. Membership of Food South Australia is open to food and beverage manufacturers, processors and producers, industry service providers and industry associations.</p>

ACTIVITIES/SERVICES
<ul style="list-style-type: none"> - The Food South Australia Summit - South Australia Food and Beverage Export Hub - South Australian Premier's Food&Beverage Industry Awards - SA Food & Beverage Export Strategy 2022 to 2027 - Industry training - Training grants and awards - Food SA prize to Univ of Adelaide student - Trade show program – domestic and international - In-bound domestic and international buyers programs - Advocating for our industry - International in-country support - Business referrals - Sales growth navigator - Members Marketplace (Offers from sponsors) - Support “I Choose SA” & “EatDrink Local SA” campaign - Numerous other activities

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

SUBMISSIONS TO GOVERNMENT	STANDARDS SETTING	INDUSTRY SELF REGULATION	ADVICE, COACHING & MENTORING	KNOWLEDGE SHARING	TRAINING & SHORT COURSES
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How do they see their role? What do they do?

“Food South Australia is feeding connections to help industry grow, unite, lead and sustain South Australia's food industry into the future. As the State's peak industry body, Food South Australia aims to grow value and opportunities for members and industry through key services and programs. Food South Australia was established in 2010 through the merger of long running industry associations - Food Adelaide and Flavour SA -bringing together the memberships, roles and staff and drawing domestic & international marketing and business development expertise into a single focal point and service delivery source for industry. We are strategically co-located with SARDI at the Waite Campus with industry development and food technology staff embedded in the Food South Australia team to enhance effectiveness and efficiency of service delivery to industry. Our focus is connecting businesses in the food industry with the services and expert advice they need to develop their businesses, grow their bottom line and connect with new markets. Food South Australia is industry led and membership based; and also acts as a first point of contact for all of industry to access complementary services for non-members. The creation of Food South Australia is a natural and necessary step for the maturing food sector in South Australia, providing an innovative model for the efficient and effective delivery of support to the sector and strong leadership.”

Food SA History and Profile

“Food South Australia is an independent, industry-led and membership-based organisation representing food and beverage manufacturing companies based in South Australia. Our mission is to support and sustain the South Australian food and beverage industry. Food South Australia also hosts the South Australian Food Industry Awards Program and Eat Local SA.

As the state's peak industry body for the food and beverage industry, Food South Australia assists businesses to access services, expert advice and growth programs to grow their bottom line and connect with new markets.

Food South Australia is the first point of contact for businesses and industry stakeholders to access information about the food and beverage sector in South Australia and to access services and support.”

Food SA LinkedIn profile

“Food South Australia is the state's peak body for the food and beverage industry, with a mission to support and sustain the industry in the state by helping businesses of all sizes to grow their markets, capability, and industry connections. Food South Australia is independent, industry led, and membership based.”

<https://retailworldmagazine.com.au/looking-forward-looking-back-food-sa-turns-10/>

What are some good ideas from this organisation?

1

DELIVER A TRADE
SHOW PROGRAM &
BUYERS VISITS

Trade show program

- Foodservice Australia, Melbourne
- Foodex, Japan
- South Australian FoodBev&Tech Trade Show
- SIAL China
- Fine Food Australia, Melbourne
- FHA Singapore

2

MAKE SUBMISSIONS
TO GOVERNMENT

Food South Australia has recently provided input or made submissions to:

- Parliamentary Inquiry into Recycling
- Creating a Modern Industry Policy for South Australia
- Riverland Wine and Food Centre Consultation
- Single Use Plastics
- Container Deposit Legislation
- 20 Year State Infrastructure Strategy Discussion
- Country of Origin Labelling

3

OFFER A MEMBERS
DIRECTORY

Food South Australia's food and beverage manufacturer, processor and producer members represent the best brands and products in the state. This directory can help you locate makers of specific products or providers of contract production services.

IDEA: Food SA runs an annual industry summit



9.00AM WELCOME AND INTRODUCTION
MC – TAMIA CAREY, GENERAL MANAGER, FPE
In her position as General Manager of Food Processing Equipment, Tamia is a passionate friend and dynamic contributor to South Australia's food and beverage industry. We welcome Tamia's return as our MC in 2022.

CATHERINE SYRKE, CHIEF EXECUTIVE OFFICER, FOOD SOUTH AUSTRALIA
Catherine leads Food South Australia's advocacy on behalf of the food and beverage industry, now more important than ever as industry stakeholders work together to navigate the COVID-19 recovery process and adapt to Tomorrow's New Normal.

9.10AM KEYNOTE ADDRESS: ADAPT
OLIVIA BOWEN
Starting in the late '90s and continuing for over a decade, broadcast and print media players have undergone a level of disruption and change that has not been seen since the industrial revolution. The food and beverage industry is facing through similar challenges right now. Our presentation will focus on the adaptability required to chase an ever-changing customer and understand how we can easily bridge the customer and focus our efforts on the business instead. These are lessons learnt over decades of market disruption and business transformation in a variety of industries. His lessons are full of common sense and advice to implement immediately, providing simple yet powerful concepts of change, adaptability, transformation, technology and innovation.

10.10AM THE SOUTH AUSTRALIAN PICTURE
CON MICHAEL, CHIEF INVESTMENT OFFICER, STATEWIDE SUPER
As the world continues to emerge from COVID-19 in 2022 and economies begin to recover, we are likely to experience a period of higher interest rates and lower returns than we've seen over the past few years. When it comes to superannuation, it highlights the importance of continuing to focus on long-term returns, goals and strategies. Can we discuss the potential impact of this year's state and federal elections.

10.40AM MORNING TEA

11.10AM MANUFACTURING MARKETING
TUBORG'S A PULPING MANUFACTURING BUSINESS INTO AN OFFICE NERVOUSITY
TOMY FROING, URBAN BREW
In 2016, Tuborg's business model was manufacturing and selling coffee pods, predominantly in Cakes, Woolsheaf, and central packing. A year later, all changed. They began centralising customer word (customer coming over half a million dollars, which allowed Tuborg to get food). Since this coupling event, Tomy has pivoted Tuborg's business model to become heavily focussed on commerce and sales marketing, which now accounts for 70% of sales. Sales and profitability have improved dramatically, and the business now has over 50 staff. Tomy will share with you exactly how he's done it, covering all the highs and lows throughout his journey.

11.40AM SECURING YOUR FUTURE
TESSA BOWLES, SENIOR CONSULTANT, SECURITY & AWARENESS, NAB
With cyber threats targeting Australians at unprecedented levels, understanding current threat and scam threats has never been more important. In this session, NAB's security specialist, Tessa Bowles will provide a comprehensive overview of today's cyber security threat landscape. Tessa will explain the different ways in which criminals are targeting individuals and businesses, and provide practical advice on how you, and your business, can stay safe.

12.10PM EXPORTING EXCELLENCE
THE SOUTH AUSTRALIAN FOOD AND BEVERAGE 5 YEAR EXPORT STRATEGY
The South Australia Food and Beverage 5 Year Export Strategy sets the goal of increasing export sales from AU\$2.6 billion in 2022 to AU\$5.04 billion by 2027. This will be achieved by South Australian food and beverage businesses working together and supported by the state and Australian governments, overcoming the hurdles and maximising the global opportunities as identified in the strategy. Hear about how you can benefit and be part of the exciting future.

1.00PM LUNCH

2.00PM THE PACKAGING PARADOX
CHRISTOPHER & CLAIRE KNELLER
How can we meet consumer expectations on plastic without increasing food waste?
In this session, ABC's Craig Kneller and Claire Kneller from WRAP Asia Pacific, in conversation about the packaging paradox. Bring your questions for this exciting and interactive session with two experts in packaging and food discussing the challenges and opportunities for food businesses. Presented with support from Fight Food Waste CRC.

FIGHT FOOD WASTE
Cooperative Research Centre

3.15PM TURBOCHARGE YOUR WORKFORCE
WELLBEING STRATEGIES TO BOOST YOUR FOOD BUSINESS
DR TOM NATHAN, DIRECTOR, HEALTHY MINDS
Wellbeing is intrinsically linked to work performance. When leaders are well, they lead well. When workers are well, they are more productive, efficient and engaged. The crucial question is what works when it comes to practical wellbeing initiatives? In this keynote presentation, Dr Tom Nathan will share specific insights and strategies from his award-winning Healthy Minds Program and the impact it is having on leading food, wine and consumer goods companies locally and globally.

3.30PM AFTERNOON TEA

4.00PM TRENDY TRACTION
JUSTIN NEL, COMMERCIAL DIRECTOR, ANALYTICS & MEDIA, @WORLDWIDE
Consumer behaviour continues to change at a rapid rate. What was true prior to the pandemic might not be anymore. Underneath meet the agent. Justin's presentation looks at the trends we anticipate through 2022 and beyond, and will provide the key food and beverage insights you need to understand driving shopper demand now and into the future.

5.00PM SUMMIT NETWORKING DRINKS

*The Food South Australia Summit Program may be subject to change.

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Statewide Super

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Media **Press**

RetailWorld

The Food South Australia Summit is presented and supported by

FOOD SOUTH AUSTRALIA
GOVERNMENT OF SOUTH AUSTRALIA

www.foodsouthaustralia.com.au

#FoodSAsummit

APPENDIX STRUCTURE

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1. British Columbia
2. Alberta
3. Manitoba
4. Ontario
5. Quebec
6. Atlantic Canada

II. United Kingdom

1. English Regions
2. Wales
3. Scotland

III. United States

1. California
2. Pacific Northwest
3. Midwest
4. Southeast
5. New Jersey

IV. Australia

1. Queensland
2. South Australia
3. Victoria

MNFG is a Independent association and NGO that supports the region's food industry, sits under NorthLink; services delivered by partners



DETAILS

NAME	Melbourne's North Food Group
ADDRESS	Suite 4, Bld 1, R&D Technology Enterprise Centre, La Trobe University 2 Research Ave Bundoora 3086 Victoria, Australia
PHONE	+61 3 9479 3339
EMAIL	margaret@melbournenorth.com.au
WEBSITE	https://melbournenorthfoodgroup.com.au
# OF STAFF	1 (+1 PT)
# OF BOARD	"Advisory Committee"
# OF MEMBERS	162
FOUNDED	2018
COVERAGE	Food and beverage manufacturing in North Melbourne

RESOURCES/PUBLICATIONS

- Newsletter
- Partner directory (manufacturers and service providers)

FUNDING MODEL/INCOME STREAMS

- Startup over 2 years (2018-2020), government funded, followed by private funding and matched funding (2021-2022).
- Income: 70% members (members and service partners); 30% Government, sponsors, events.
- Overall management of the Melbourne's North Food Group is provided by NORTH Link. NORTH Link is a strong regional partnership it comprises local councils (the cities of Banyule, Darebin, Hume, Moreland and Whittlesea and the shires of Mitchell and Nillumbik), local tertiary education institutions and industry.

MEMBERSHIP FEES/CHARGES

Basic membership: \$990 +GST

Service Partnerships: Platinum \$10,000/yr, Gold \$5,000/yr, Silver \$900/yr)

Sponsorship: \$5,000 upward

PROFILE

The Melbourne's North Food Group is an active and dynamic industry group, delivered by NORTH Link, that represents food, beverage and fibre businesses across northern Melbourne.

MISSION

Our Mission: To support the local food, beverage and fibre industry to improve productivity, competitiveness and opportunities by providing access to business reviews, group buying, best practice systems, export advice, training, trade shows/missions and more.

Our purpose is to elevate the local industry and help our businesses improve productivity, competitiveness and opportunities. We do this by providing access to business reviews, group buying, best practice systems, export advice, training, trade shows/missions and more.

ACTIVITIES/SERVICES

- Business reviews
- Support with government grants and assistance
- Group buying
- Trade shows and missions
- Training and skills development workshops
- Webinars
- Employment program and student placements (works with local universities to "bridge the employment skills gap between industry and education")

Where does the organisation deliver? Where is the focus?

FOOD & BEVERAGE INDUSTRY BODY ROLES THAT ARE TYPICALLY SELF-FUNDED

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How do they see their role? What do they do?

“Several years ago, northern Melbourne was facing employment challenges compounded by the cessation of manufacturing at the Ford plant and impacts on the broader supply chain, as well as a wind-down of traditional manufacturing. In response, regional partners commissioned independent and comprehensive research that identified substantial opportunities in a growth manufacturing area – food and beverage.

The Food and Beverage Growth Plan: Melbourne’s North (2014), a report aiming to increase productivity, competitiveness, collaboration and drive innovation in this key manufacturing sector, was launched by the Hon Lily D’Ambrosio MP, Minister for Industry, in April 2015. The plan identifies the potential to grow the food and beverage sector in Melbourne’s North by an extra 7000 jobs and increase turnover from \$2.6 billion to \$5 billion over 10 years, if all recommendations are adopted.

The key recommendation was the creation of a powerful regional industry body – a Melbourne’s North Food Group – to provide vision and leadership for the regional food and beverage sector, which comprises over 400 individual businesses. This new group builds on the foundations provided by the Plenty Food Group, which was established in 2003 and co-funded by the cities of Hume and Whittlesea.

The Melbourne’s North Food Group was established in February 2018. Business network facilitator and economic development non-profit, NORTH Link, was selected to manage the group. Funding was provided by the Victorian Government Department of Economic Development, Jobs, Transport and Resources and project partners from across Melbourne’s north.” MNFG website

What are some good ideas from this organisation?

1

ORGANISE A BUYING GROUP FOR MEMBERS

- Group buying leverages MNFG partner demand to secure competitive pricing and significant savings on a broad range of goods and services.
- Partner businesses provide the MFGN Buying Group with data on their current demand, prices and suppliers. The MN Buying Group uses that data to conduct tender rounds to obtain the best price and best quality.

2

DELIVER BUSINESS REVIEWS

- Membership provides a Strategic Business Review on joining.
- Develops strategic plans (revenue and profit) and easy-to-adopt implementation plan.
- When business reaches revenue of \$1.5m can access the Entrepreneur Program.

3

ORGANISE MEET THE BUYER TOURS AND TRADE SHOW PARTICIPATION

- Coordinate the stand at National (e.g. Fine Food Australia, Box Hill Expo) and International Trade shows (Thaifex, Gulfood) and host overseas buyers who are visiting Melbourne.
- This offers our partners the opportunity to display products and services, and build relationships, with new customers from selected markets.

IDEA: MNFG has wrangled a wide ranging group of sponsors

Founding partners



Sponsors



FDI is part of a wider association of association (Ibec) whose members employ over 70% of the private sector workforce in Ireland



DETAILS

NAME	Food Drink Ireland (FDI)
ADDRESS	84/86 Lower Baggot Street Dublin 2 IRELAND
PHONE	+353 (0)1 605 1500
EMAIL	info@fooddrinkireland.ie
WEBSITE	https://www.ibec.ie/connect-and-learn/industries/food-and-drink/food-drink-ireland
# OF STAFF	12
# OF BOARD	N/A
# OF MEMBERS	150+ food & drink manufacturers Represent 94% of sector exports
FOUNDED	N/A
COVERAGE	Food and beverage processing; association of associations

RESOURCES/PUBLICATIONS

- Newsletter
- Social media
- Press releases
- Reports on sector priorities

FUNDING MODEL/INCOME STREAMS

- Membership fees

MEMBERSHIP FEES/CHARGES

Ibec membership is for all businesses - home grown, multinational, big or small. Our members employ 70% of the private sector in Ireland. We provide a powerful voice in government on the key international, national and industry issues impacting business, supported by our 38 trade associations covering a wide range of industry sectors. Ask us for a membership quote. We can provide you with a membership quote for your business to join Ibec and highlight the relevant services and trade associations that will be of value to your organisation and colleagues.

PROFILE

Food Drink Ireland (FDI) is the main trade association for the food and drink industry in Ireland. It represents the interests of over 150 food, drink and non-food grocery manufacturers and suppliers. Related Ibec associations include: Drinks Ireland, Dairy Industry Ireland, Prepared Consumer Foods Ireland, Petfood Association of Ireland, Irish Breakfast Cereal Association, the Chocolate & Confectionery Association of Ireland, the Irish Break Bakers Association and others

MISSION

FDI is committed to ensuring an environment exists which is conducive to the success and further growth of the food and drink industry in Ireland.

ACTIVITIES/SERVICES

- FDI provides leadership and direction on a number of key strategic issues, including the economic importance and reputation of the sector, sustainability, competitiveness, Brexit, innovation, trade, skills, regulation and general food chain policy.
- We also develop and deliver industry-led training to the Food and Drink Industry through our Food Drink Ireland Skillnet.
- Working groups on public affairs, regulator affairs and sustainability
- IBEC Academy: We provide a premium human resource and employee relations service to all our members from our head office in Dublin or regionally via our regional offices. Our regional offices also lobby on local business issues.

The Danish Agriculture & Food Council is a peak industry body formed by a merger of a range of agricultural organisations



DETAILS

NAME	Landbrug & Fødevarer F.m.b.A. Danish Agriculture & Food Council
ADDRESS	Axelborg, Axeltorv 3 1609 - Copenhagen V DENMARK
PHONE	+45 3339 4000
EMAIL	info@lf.dk info@agricultureandfood.dk
WEBSITE	https://agricultureandfood.dk
# OF STAFF	400 in DA&FC; 1,000+ in group
# OF BOARD	Governed by two boards (primary sector board and industry board)
# OF MEMBERS	As a member organization for farmers and companies, we account for 25% of Denmark's total exports and employs 189,000 people,
FOUNDED	Formed in 2009 merger of industry associations
COVERAGE	Agriculture

RESOURCES/PUBLICATIONS

- Industry newsletter
- Press releases
- Danish Agriculture Annual Statistics (Facts about the Danish food cluster)
- Climate Neutral 2050 Strategy
- Social media (Facebook, Twitter, LinkedIn, YouTube, Instagram)

FUNDING MODEL/INCOME STREAMS

- EU & Danish Government Funds
- Membership fees from member organisations
- Some levied roles (e.g. Danish Pig Research Centre)

MEMBERSHIP FEES/CHARGES

The members are organized into 27 agricultural associations and 10 regional farming associations. In addition, two joint associations have been formed, where an agricultural association and a family farming association have joined forces.

PROFILE

The Danish Agriculture & Food Council represents the farming and food industries of Denmark including companies, trade and farmers' associations. A merger of the Agricultural Council, Danish Slaughterhouses, Danish Pig Production, Danish Agriculture with the Agricultural Media and the Danish Agricultural Advisory Service, as well as significant parts of the Dairy Association's activities.

MISSION

The Danish Agriculture & Food Council:

- Promotes the political influence of the agricultural and food sector
- Offers a comprehensive range of cost-effective services for its members
- Implements research and development programmes within food safety and veterinary issues, animal health and productivity, animal welfare, environment and energy.

ACTIVITIES/SERVICES

- Advocacy: The Danish Agriculture & Food Council handles the professional interests of its members
- Negotiated bulk discounts for members (e.g. heating oil, insurance, mobile phone services)
- Agriculture Society Award
- "Food Nation Solutions of tomorrow By Denmark" branding

ANYSFP is a industry organisation founded in 1885 representing a wide range of firms in the state



Associated
New York State
Food Processors

DETAILS

NAME	Associated New York State Food Processors
ADDRESS	3177 Latta Rd #313 Rochester, NY 14612 UNITED STATES
PHONE	+1 585 244 1800
EMAIL	amy.platenik@rballiance.com
WEBSITE	https://nysfoodprocessors.org
# OF STAFF	1
# OF BOARD	4
# OF MEMBERS	N/A
FOUNDED	1885
COVERAGE	Food processors, industry suppliers, service providers

RESOURCES/PUBLICATIONS

- ANYSFP Member Profile/Directory Portal "Cornucopia"
- Industry news and events listings
- Member job listings

FUNDING MODEL/INCOME STREAMS

- Membership fees
- Sponsorships

MEMBERSHIP FEES/CHARGES

\$400/year

PROFILE

The Associated New York Food Processors is an organization utilizing technology to drive advancements in connectivity and networking in New York State and beyond to help its members to grow their businesses within the regional food ecosystem.

MISSION

Driving the growth of New York's food processors

ACTIVITIES/SERVICES

- Networking with knowledgeable, experienced and qualified professionals
- Access to trends, news, updates and NYS Food Ecosystem current events
- ANYSFP Fireside Chats with industry suppliers
- Use of the Factory tours, trade shows, outings, golf tournament
- Education & training opportunities
- Member site tours
- Staffing Support
- Exposure to members, organizations & companies that are a part of the NYS Food Ecosystem
- Annual Golf Outing
- Focus on the Future: Annual Dinner Meeting
- Annual Holiday Luncheon / Annual Christmas Party

AFMA represents retailers and suppliers to government and runs networking events



DETAILS

NAME	Arizona Food Marketing Alliance
ADDRESS	120 E. Pierce St, Phoenix, AZ 85004 UNITED STATES
PHONE	+1 602 252 9761
EMAIL	N/A
WEBSITE	https://afmaaz.org
# OF STAFF	4
# OF BOARD	22
# OF MEMBERS	50++
FOUNDED	1943
COVERAGE	Food retailing, food processing, industry suppliers

RESOURCES/PUBLICATIONS

- Publish Arizona Food Industry Journal

FUNDING MODEL/INCOME STREAMS

- Membership fees
- Event fees
- Advertising
- Sponsorships

MEMBERSHIP FEES/CHARGES

Retail membership (fees vary by revenue)
Supplier membership (fees vary by revenue)

PROFILE

The Arizona Food Marketing Alliance (AFMA) is the state trade non-profit association for the Food Industry in Arizona. AFMA represents all food retailers (Supermarkets, Convenience Stores, and Independents) and their suppliers in all areas that are impacted by state and federal legislatures (taxes, fees, labeling, food safety etc.).

MISSION

The Arizona Food Marketing Alliance represents and advocates the interest of the Arizona Retail Food Industry and their supplier partners in legislation, regulation, education and other appropriate services. We strive to represent and promote this industry to bring prominence and more awareness on its impact and presence in Arizona.

CLEAR: Community, Legislation, Education, Alliance and Regulation

ACTIVITIES/SERVICES

- Advocacy and lobbying
- AFMA Leadership awards banquet
- AFMA Golf Tournaments
- AFMA Scholarship Luncheon
- AFMA Scholarships (raised from golf tournaments and other industry events)

TFPA represents food processors in Texas



DETAILS

NAME	Texas Food Processors Assn.
ADDRESS	P.O. Box 341 College Station, TX 77841 UNITED STATES
PHONE	+1 979 218 4943
EMAIL	cindy@tfpa.org
WEBSITE	http://www.tfpa.org (may need VPN)
# OF STAFF	2
# OF BOARD	13
# OF MEMBERS	100+
FOUNDED	1943 as East Texas Cannery Association; then Southwest Cannery Association; 1970 to TFPA
COVERAGE	Food processors and suppliers

RESOURCES/PUBLICATIONS

- Membership directory
- Newsletter

FUNDING MODEL/INCOME STREAMS

- Membership fees
- Advertising
- Conference fees

MEMBERSHIP FEES/CHARGES

Corporate Processor Member \$300/year
Associate Member \$300/year
Affiliate Member \$300/year

This membership includes up to four individuals from the same firm to be listed in the directory. Additional listings are an additional \$100 per person.

PROFILE

The Texas Food Processors Association (TFPA) is a non-profit trade association representing companies engaged in the processing of food products and includes companies that provide them with ingredients, equipment, materials, services and industry affiliates. The TFPA membership employs over 3,000 workers in companies ranging in sales volume from \$500,000 to \$50 million.

MISSION

The Texas Food Processors Association (TFPA) is devoted primarily to support, promote and encourage education in all aspects of the food industry. To portray and enhance a spirit of professionalism in food science and technology.

ACTIVITIES/SERVICES

- TPFA Annual Conference
- TPFA Hall of Fame Inductees
- TPFA Scholarship Program (from organisation fund raisers)

DOCUMENT STRUCTURE / AGENDA

KEY QUESTION

What problem are we trying to solve?

Do we need an industry organisation focused on WA food and beverage manufacturing?

What are our options for an industry organisation focused on WA food and beverage manufacturing?

APPENDIX I – GLOBAL MODELS
What does best practice look like?

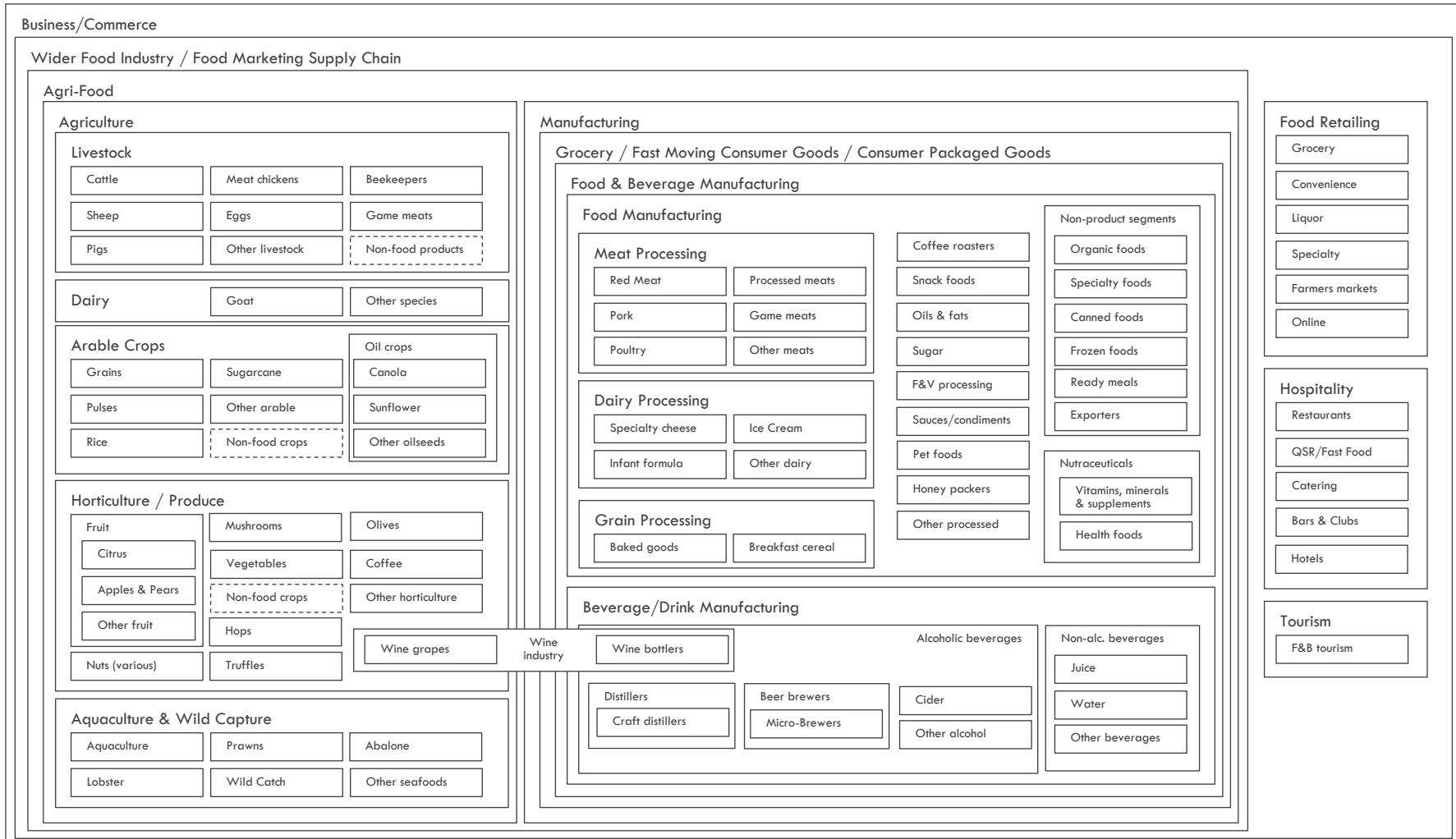
APPENDIX II – WA STOCKTAKE
What do we have currently?

APPENDIX III: PAST WA GROUPS
What have we had before?

DETAILS/SUB-QUESTIONS

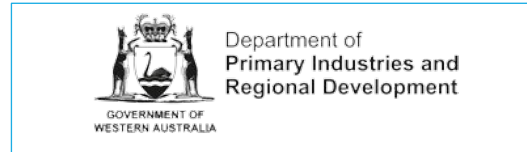
- What is the WA context for this project? (e.g. diverse, geographically spread out, majority small and medium size enterprises)
- Is there a 'gap in the market' in WA identified through this stocktake?
- Why have past organisations failed? What are the critical factors of success?
- Is there sufficient appetite from industry in WA to drive and fund a [potentially new*] representative group with sufficient shared interests?
- How can WA action these findings to establish (or reframe) a WA food and beverage manufacturing industry group, including funding requirements, governance/structure, and critical factors of success?
- What are the details of proven, successful global models adapted to fit with the WA context of diverse, geographically spread out, majority small and medium size enterprise? What is a clear framework for WA to follow based on these models? How can new models either fill the gap in the market (or assist existing organisations) to better support the WA food and beverage manufacturing sector?
- What are the short, medium, and long-term funding structures of the identified models?
- Is there a role for government? If so, what level of support would be required and for what term to establish a sustainable business model?
- What proven, successful global models of industry groups - that fit with the WA context of diverse, geographically spread out, majority small and medium size enterprises - exist?
- What agrifood industry groups (including quasi-government agencies, formal and informal arrangements) are currently operating in WA? Who and where do they represent? What is their funding model? What services do they provide? What is their role or function?
- What agrifood industry groups (including quasi-government agencies, formal and informal arrangements) are currently operating or have operated in WA?

The wider agri-food/food and beverage industry can be extensively segmented



Beyond industry level organisations, there are over 100 organisations supporting firms at the Federal, State and local level

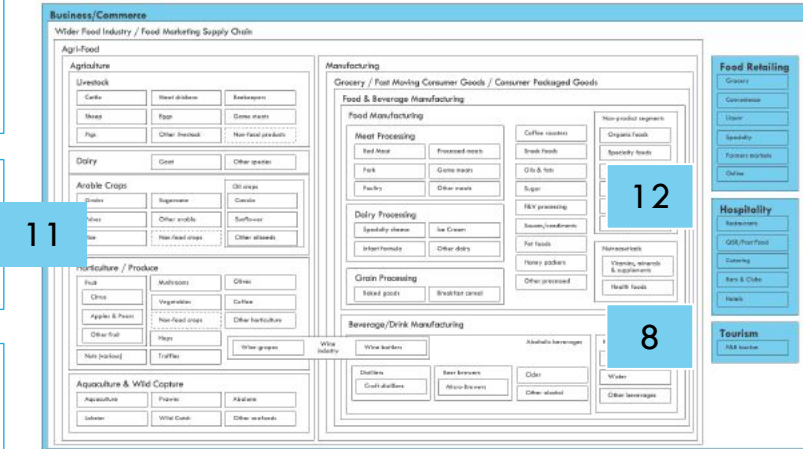
F&B SUPPORTING ORGANISATIONS



8  Cooperative Research Australia
 Australian Government
 Department of Industry, Science, Energy and Resources
 Industry Growth Centres

11 

11  AGRICULTURAL PRODUCE COMMISSION
 Supporting Producers' Initiative



REGIONAL DEVELOPMENT COMMISSIONS 9

 Regional Development Australia 9

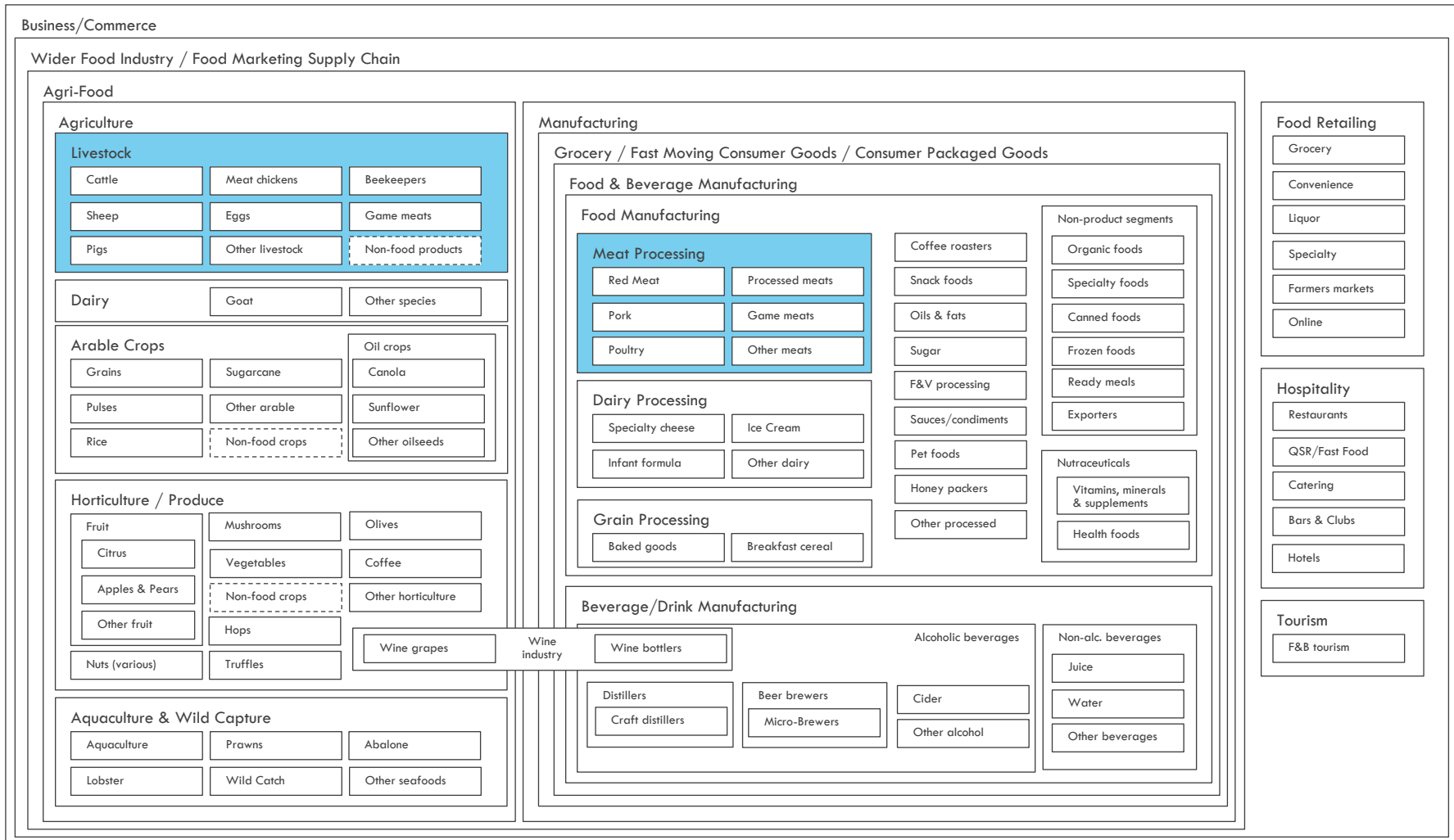
SCIENCE AND RESEARCH ORGANISATIONS* 7

12 EDUCATION AND TRAINING FACILITIES

19 OTHER AGENCIES/ ORGANISATION

* Excluding Universities

MEAT – RED MEAT



A large number of organisations have some level of responsibility for red meat in Western Australia

RED MEAT

NATIONAL LEVEL

STATE/REGIONAL LEVEL

					WA Regenerative Livestock Producers
		Plus another 20-30 area based farmer groups			

Western Australia has a number of gaps in red meat industry representation at the post-farmgate level

	ON-FARM	POST-FARMGATE
NATIONAL		
STATE		<div style="border: 1px dashed red; padding: 5px; display: inline-block; margin-bottom: 10px;"> <p>GAP WA Meat Processors*</p> </div> <div style="border: 1px dashed red; padding: 5px; display: inline-block; margin-bottom: 10px; margin-left: 100px;"> <p>GAP WA Renderers</p> </div> <div style="border: 1px dashed red; padding: 5px; display: inline-block;"> <p>GAP WA Livestock Exporters</p> </div>

* Large processors members of AMPC: Harvey Beef, V&V Walsh, WAMMCO, Fletcher

MEAT – RED – NATIONAL

NATIONAL

			
<p>RED MEAT ADVISORY COUNCIL (RMAC)</p>	<p>MEAT AND LIVESTOCK AUSTRALIA (MLA)</p>	<p>AUSTRALIAN MEAT PROCESSOR CORPORATION (AMPC)*</p>	<p>AUSTRALIAN MEAT INDUSTRY COUNCIL (AMIC)[^]</p>
<p>National</p>	<p>National</p>	<p>National (State reps)</p>	<p>National</p>
<p>Peak – Facilitator cross-sector</p>	<p>Farmers - Research (RRDC)</p>	<p>Processors (RRDC)</p>	<p>Peak Red Meat – Advocacy</p>
<p>http://rmac.com.au</p>	<p>https://www.mla.com.au</p>	<p>https://www.ampc.com.au</p>	<p>https://amic.org.au/</p>
			
<p>SHEEP PRODUCERS OF AUSTRALIA (SPA)</p>	<p>GOAT INDUSTRY COUNCIL (GIC)</p>	<p>CATTLE COUNCIL OF AUSTRALIA (CCA)</p>	<p>NATIONAL FARMERS FEDERATION</p>
<p>National</p>	<p>National</p>	<p>National</p>	<p>National</p>
<p>Advocacy – Sheep Producers</p>	<p>Advocacy - Meat, Fibre, Dairy producers</p>	<p>Advocacy – Cattle Producers</p>	<p>Peak – Farmer advocacy</p>
<p>https://sheepproducers.com.au</p>	<p>https://www.goatindustrycouncil.com.au</p>	<p>https://cattlecouncil.com.au</p>	<p>https://nff.org.au</p>

*Members include D'Orsogna, Harvey Beef, V&V Walsh, WAMMCO, Fletcher, ^ Including Smallgoods (D'Orsogna member)

MEAT – RED MEAT – NATIONAL

NATIONAL

		 AUSTRALIAN LIVESTOCK EXPORTERS COUNCIL	
<p>AUSTRALIAN LOT FEEDRERS ASSOCIATION</p>	<p>THE AUSTRALIAN LIVESTOCK EXPORT CORPORATION</p>	<p>AUSTRALIAN LIVESTOCK EXPORTERS COUNCIL</p>	<p>AUSTRALIAN RENDERERS ASSOCIATION</p>
<p>National</p>	<p>National</p>	<p>National</p>	<p>National[^]</p>
<p>Advocacy - Lotfeeders</p>	<p>Research – Live</p>	<p>Advocacy – Live</p>	<p>Peak – all meat - Advocacy</p>
<p>https://www.feedlots.com.au</p>		<p>https://auslivestockexport.com</p>	<p>https://www.ausrenderers.com.au</p>

MEAT – RED MEAT – STATE/REGIONAL

STATE/REGIONAL

 <p>WAFARMERS WAFarmers Livestock Council</p>	 <p>PGA</p>	<p>WA Regenerative Livestock Producers</p>	 <p>WALRC WA Livestock Research Council</p>
<p>WAFARMERS LIVESTOCK COUNCIL</p>	<p>PASTORALISTS AND GRAZERS ASSOCIATION OF WA (PGA)</p>	<p>WA REGENERATIVE LIVESTOCK PRODUCERS</p>	<p>WESTERN AUSTRALIAN LIVESTOCK RESEARCH COUNCIL (WALRC)*</p>
<p>State</p>	<p>State</p>	<p>State</p>	<p>State</p>
<p>Livestock – Farmer Advocacy</p>	<p>Advocacy- Farmers</p>	<p>Support, Info sharing</p>	<p>Red meat – R&D review for State</p>
<p>https://wafarmers.org.au/</p>	<p>http://www.pgaofwa.org.au</p>	<p>-</p>	<p>https://walrc.com.au</p>
 <p>WALFA WESTERN AUSTRALIAN LOT FEEDERS ASSOCIATION</p>	 <p>WESTERN BEEF Association Inc</p>		
<p>WA LOT FEEDERS ASSOCIATION</p>	<p>WESTERN BEEF ASSOCIATION</p>		
<p>State</p>	<p>State</p>		
<p>Advocacy – Lot Feeders</p>	<p>Advocacy, R&D - Farmers</p>		
<p>https://www.facebook.com/feedlotsWA/</p>	<p>-</p>		

* Initiated by MLA

RED MEAT – AMPC covers most of the large red meat processors in WA



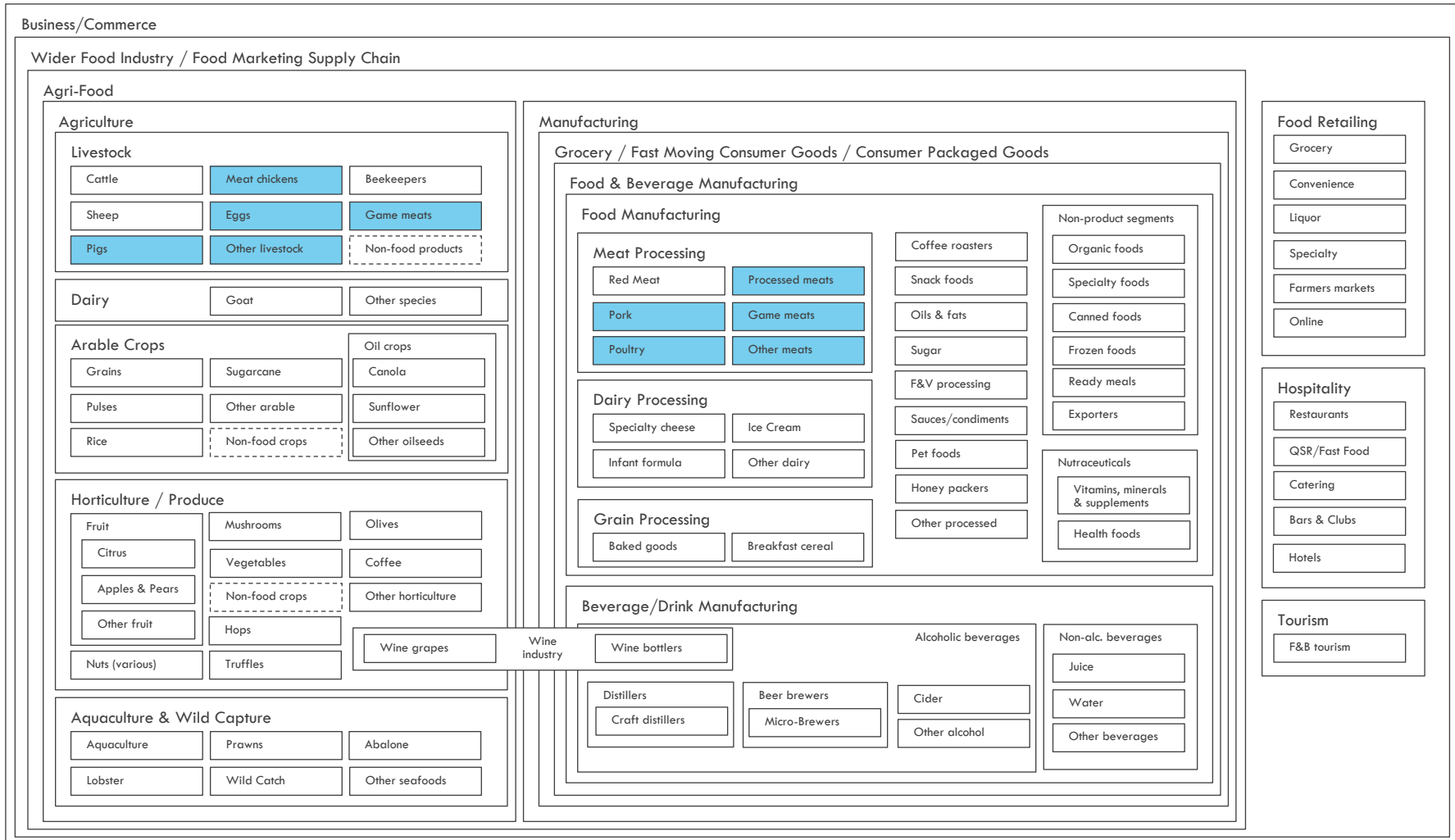
DETAILS	
NAME	Australian Meat Processors Corporation
ADDRESS	Suite 2, Level 6 99 Walker Street North Sydney NSW 2060
PHONE	+61 2 8908 5500
EMAIL	admin@ampc.com.au
WEBSITE	https://www.ampc.com.au
# OF STAFF	11
# OF BOARD	8
# OF MEMBERS	106 members, (135 processing plants)
FOUNDED	TBC
COVERAGE	Meat Processors

RESOURCES/PUBLICATIONS
<ul style="list-style-type: none"> - Conferences - Scholarships - Environment and Sustainability resources
FUNDING MODEL/INCOME STREAMS
<ul style="list-style-type: none"> - Commonwealth funding – levies under AU Meat and Livestock Act 1997
MEMBERSHIP FEES/CHARGES
Levy

PROFILE
The Australian Meat Processor Corporation (AMPC) is the specialist research and development (R&D) provider for Australian meat processors
MISSION
AMPC's mandate is to provide research, development, and extension (RD&E) services that improve the sustainability and efficiency of the sector.
ACTIVITIES/SERVICES
<ul style="list-style-type: none"> - Sits under RMAC; MLA provide services - Project Planning, prioritise programs. - Dedicated co-innovation manager - Regional extension meetings - Innovation trials and pilots - Webinars and Workshops - Access to Plant Initiated Project funding - Education materials - Input into innovation focus areas - Awards - Training

NOTE: Large processors members of AMPC: Harvey Beef, V&V Walsh, WAMMCO, Fletcher

MEAT – PORK, POULTRY & OTHER MEATS





A large number of organisations have some level of responsibility for pork, poultry and other meats in Western Australia

PORK, POULTRY & OTHER MEATS



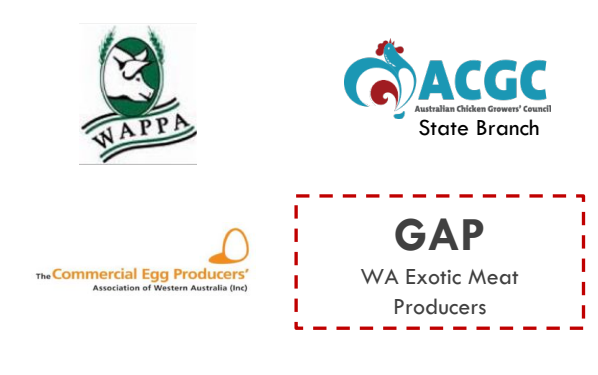

NATIONAL LEVEL

					
					
Emerging Insect Technology Hub (EIT-Hub)*					

STATE/REGIONAL LEVEL

Western Australia has a number of gaps in poultry and other meats industry representation at the post-farmgate level

	ON-FARM	POST-FARMGATE
NATIONAL		
STATE		








PORK, POULTRY & OTHER MEATS

NATIONAL

			
<p>AUSTRALIAN PORK LIMITED (APL)</p>	<p>AUSTRALIAN CHICKEN MEAT FEDERATION (ACMF)</p>	<p>AUSTRALIAN CHICKEN GROWERS' COUNCIL</p>	<p>AGRIFUTURES – CHICKEN MEAT</p>
<p>National</p>	<p>National (+ State Assoc)</p>	<p>National (State Reps)</p>	<p>National</p>
<p>Peak - (RRDC)</p>	<p>Peak</p>	<p>Growers – contract (member of Fed)</p>	<p>Meat – RD&E (RRDC)</p>
<p>https://australianpork.com.au</p>	<p>https://www.chicken.org.au</p>	<p>https://acgc.org.au</p>	<p>https://www.agrifutures.com.au/rural-industries/chicken-meat/</p>
			
<p>POULTRY HUB AUSTRALIA*</p>	<p>AUSTRALIAN POULTRY INDUSTRIES ASSOCIATION (APIA)</p>		
<p>National</p>	<p>National (member of Fed)</p>		
<p>Peak (meat, egg) R&D, Info sharing</p>	<p>Processors – Peak advocacy</p>		
<p>https://www.poultryhub.org</p>	<p>-</p>		

PORK, POULTRY & OTHER MEATS

NATIONAL

			
<p>AUSTRALIAN DUCK MEAT ASSOCIATION INC</p>	<p>DEER INDUSTRY ASSOCIATION OF AUSTRALIA</p>	<p>AGRIFUTURES DEER</p>	<p>AGRIFUTURES BUFFALO</p>
<p>Peak</p>	<p>Peak - breeder to processor</p>	<p>RD&E, funding</p>	<p>RD&E, funding</p>
<p>National</p>	<p>National</p>	<p>National</p>	<p>National</p>
<p>-</p>	<p>https://www.deerfarming.com.au</p>	<p>https://www.agrifutures.com.au/rural-industries/deer/</p>	<p>https://www.agrifutures.com.au/rural-industries/buffalo/</p>
			
<p>AGRIFUTURES KANGAROO</p>	<p>AUSTRALIAN BUFFALO INDUSTRY COUNCIL</p>	<p>KANGAROO INDUSTRY ASSOCIATION OF AUSTRALIA</p>	
<p>RD&E, funding</p>	<p>Peak- farm to processor</p>	<p>Peak – processors and traders</p>	
<p>National</p>	<p>National*</p>	<p>National</p>	
<p>https://www.agrifutures.com.au/rural-industries/kangaroo/</p>	<p>http://www.buffaloaustralia.org/Australian_Buffalo_Industry_Council/Home.html</p>	<p>https://www.kangarooindustry.com/en/</p>	

* State representation





PORK, POULTRY & OTHER MEATS

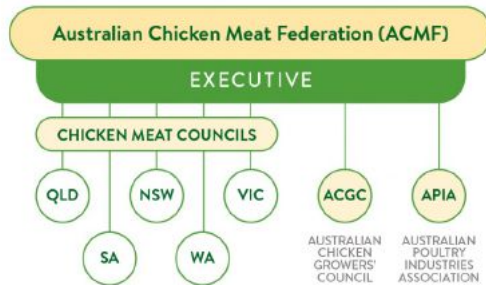
NATIONAL



	
<p>AUSTRALIAN EGGS</p>	<p>EGG FARMERS OF AUSTRALIA (EFA)</p>
<p>National</p>	<p>National</p>
<p>Peak – R&D, Marketing (RRDC)</p>	<p>Advocacy - Growers</p>
<p>https://www.australianeggs.org.au</p>	<p>https://eggfarmersaustralia.org</p>
	
<p>EMERGING INSECT TECHNOLOGY HUB (EIT-HUB)*</p>	<p>INSECT PROTEIN ASSOCIATION OF AUSTRALIA</p>
<p>R&D Collab</p>	<p>Peak</p>
<p>National</p>	<p>National</p>
<p>https://pages.agrifutures.com.au/InsectHubLaunch_Landingpage.html</p>	<p>https://www.insectproteinassoc.com/</p>

PORK, POULTRY & OTHER MEATS

STATE/REGIONAL

			
WESTERN AUSTRALIA CHICKEN MEAT ASSOCIATION (WACMA)	WESTERN AUSTRALIAN BROILER GROWER'S ASSOCIATION (WABGA)	WESTERN AUSTRALIAN PORK PRODUCERS ASSOCIATION (WAPPA)	COMMERCIAL EGG PRODUCERS ASSOCIATION OF WA (CEPA)
State	State	State	State
Peak	Peak	Peak	Peak – Producers - Advocacy
-	-	https://www.wappa.com.au	https://www.eggswa.com.au *



	
APCWA – EGG PRODUCERS [^]	APCWA – PORK
State	State
Advocacy – RD&E	Funding*, develop programs, R&D
https://apcwa.org.au/producers-committees/egg	https://apcwa.org.au/producers-committees/pork

[^] Currently no budget at the State, 4 members; * Not loading (still operating??; +61 434 941 220, info@eggswa.com.au)

PORK – WA POST FARMGATE PROCESSING – The pork industry is represented by the West Australian Pork Producers Association (WAPPA).



DETAILS	
NAME	WESTERN AUSTRALIAN PORK PRODUCERS ASSOCIATION (WAPPA)
ADDRESS	Unit 116 Westpoint Centre 396 Scarborough Beach Road Osborne Park WA 6017
PHONE	+61 8 9208 0330
EMAIL	admin@wappa.com.au
WEBSITE	https://www.wappa.com.au
# OF STAFF	1 (EO, part time)
# OF BOARD	5 Executive Committee
# OF MEMBERS	TBD
FOUNDED	1980 / 1996 (current name)
COVERAGE	Producer members (growers, sales), Industry sector members (manufacturer, marketing- pay APC)

RESOURCES/PUBLICATIONS
<ul style="list-style-type: none"> - Pig Day Out (event) - Industry Day (+ annual dinner)
FUNDING MODEL/INCOME STREAMS
<ul style="list-style-type: none"> - APC - Sponsorship
MEMBERSHIP FEES/CHARGES
APC levy

PROFILE
The West Australian Pork Producers Association (Inc) (WAPPA) promotes and safeguards the interests of Western Australian pork producers
MISSION
<p>The WA pork industry's strategic goals are:</p> <ul style="list-style-type: none"> - Increase consumption of fresh pork; - Increase productivity (increase skilled labour through importation and training); - Reduce costs across the supply chain; and - Develop and grow export markets for pork products.
ACTIVITIES/SERVICES
<ul style="list-style-type: none"> - Provide a forum for the collection and exchange of information; - Represent and advance the interests of the pork industry and its members with the Western Australian and Federal Governments and their respective departments; - Provide access to published information to improve pig production and quality; - Promote and participate in the improvement of the standard of pig meat production, processing and manufacturing, through research.

CHICKEN – WA POST FARMGATE PROCESSING

Chicken farmers are represented by the WA Association representative



DETAILS	
Name	Australian Chicken Meat Federation (ACMF)
ADDRESS	Level 7, 122 Walker Street NORTH SYDNEY
PHONE	+61 8 9274 1784 / 02 9929 4077
EMAIL	lenbrako@iinet.net.au * / acmf@chicken.org.au
WEBSITE	https://www.chicken.org.au
# OF STAFF	2-4 (TBD)
# OF BOARD	9 (Exec from ind orgs)
# OF MEMBERS	5 State Chicken Meat Councils, Australian Chicken Growers' Council Australian Poultry Industries Association, other Suppliers
FOUNDED	1964
COVERAGE	Chicken meat processors, growers, breeders, service providers

RESOURCES/PUBLICATIONS
<ul style="list-style-type: none"> - Information - Standards - Code of Practice - Reference material for industry
FUNDING MODEL/INCOME STREAMS
<ul style="list-style-type: none"> - Fees from Industry Body members
MEMBERSHIP FEES/CHARGES
TBD

PROFILE
The Australian Chicken Meat Federation Inc. (ACMF) is the peak coordinating body for participants in the chicken meat industry in Australia.
MISSION
The main aim of the ACMF is to promote and represent the interests of the chicken meat industry.
ACTIVITIES/SERVICES
<ul style="list-style-type: none"> - key role in developing policy and setting standards for the chicken meat industry in Australia, including in areas such as food safety, animal welfare, farming and processing practices, biosecurity, disease prevention and management and environmental practices.

* Contact details and phone for WA Meat Association Representative Len Brajkovich, Chair of WA CMCA

EGGS – WA PRE/POST FARMGATE

Egg farmers are represented by the WA association

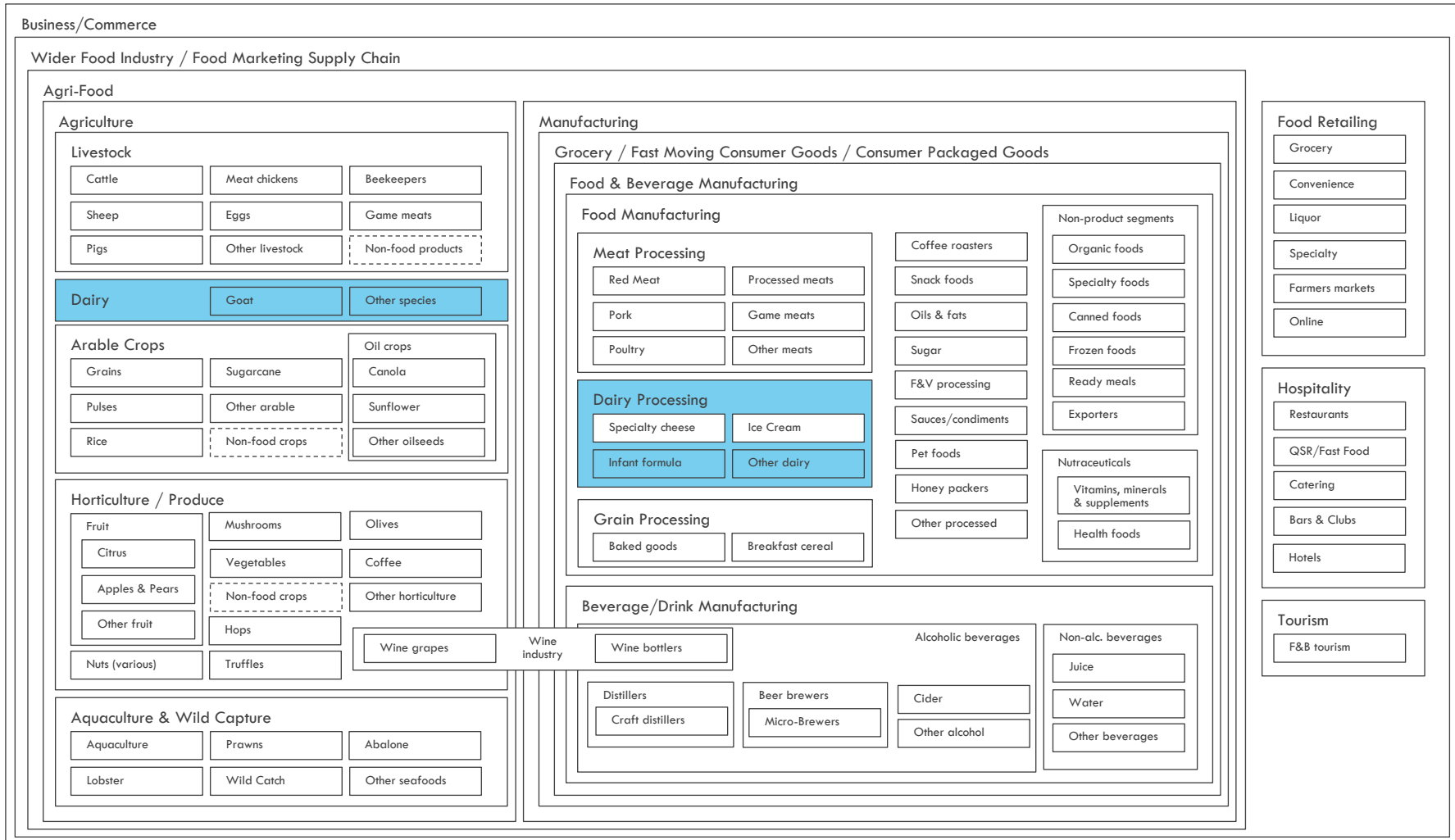


DETAILS	
NAME	COMMERCIAL EGG PRODUCERS ASSOCIATION OF WA (CEPAWA)
ADDRESS	PO Box 4024 MYAREE WA 6069
PHONE	0434 941 220 (2019) Ian Wilson President
EMAIL	info@eggswa.com.au
WEBSITE	https://www.eggswa.com.au
# OF STAFF	2 (TBD)
# OF BOARD	TBD
# OF MEMBERS	75% egg production in State
FOUNDED	TBD
COVERAGE	Commercial Egg Producers, WA Farmers Federation, Egg Farmers AU, AU Eggs

RESOURCES/PUBLICATIONS
- TBD
FUNDING MODEL/INCOME STREAMS
- Producers and members fees
MEMBERSHIP FEES/CHARGES
TBD

PROFILE
The Commercial Egg Producers Association of Western Australia (Inc) (CEPA) is the leading representative body for WA commercial egg producers. CEPA members produce approximately 85 per cent of eggs in Western Australia.
MISSION
<ul style="list-style-type: none"> - To proactively represent and promote the best interests of Commercial Egg Producers in dealings with Government, non-government bodies and their representatives. - To secure uniformity of action on matters affecting the common interest of Commercial Egg Producers. - To promote and uphold industry codes of practice for animal welfare, quality assurance, bio- security, environmental, labelling and transport of live poultry. - To promote the consumption of Western Australian laid eggs.
ACTIVITIES/SERVICES
<ul style="list-style-type: none"> - Lobbying - Advocacy

DAIRY





A large number of organisations have some level of responsibility for dairy in Western Australia

DAIRY

NATIONAL LEVEL

STATE/REGIONAL LEVEL









Western Australia has a number of gaps in dairy industry representation at the post-farmgate level

	ON-FARM	POST-FARMGATE
NATIONAL	 	     
STATE	 	<div style="border: 2px dashed red; padding: 10px; text-align: center;"> <p>GAP WA Dairy Processors</p> </div>

DAIRY – NATIONAL

There are many dairy national organisations

NATIONAL

			
<p>DAIRY AUSTRALIA LTD</p>	<p>AUSTRALIAN DAIRY PRODUCTS FEDERATION</p>	<p>AUSTRALIAN DAIRY FARMERS</p>	<p>DAIRY INDUSTRY ASSOCIATION OF AUSTRALIA</p>
<p>National</p>	<p>National (State reps)</p>	<p>National</p>	<p>National</p>
<p>Peak – Dairy (RRDC)</p>	<p>Peak – Manufacturers, advoc</p>	<p>Peak - Farmers</p>	<p>Dairy Processing Professionals</p>
<p>https://www.dairyaustralia.com.au</p>	<p>https://adpf.org.au</p>	<p>https://australiandairyfarmers.com.au</p>	<p>https://diaa.asn.au</p>
			
<p>INFANT NUTRITION COUNCIL AU AND NZ</p>	<p>AUSTRALIAN SPECIALIST CHEESEMAKERS' ASSOCIATION</p>	<p>DAIRY GOAT SOCIETY OF AUSTRALIA</p>	<p>GOAT INDUSTRY COUNCIL</p>
<p>National & NZ</p>	<p>National</p>	<p>National</p>	<p>National</p>
<p>Peak Manufacturers - advocacy</p>	<p>Knowledge</p>	<p>Breeding, knowledge</p>	<p>Peak – Meat, Fibre, Dairy (levy)*</p>
<p>https://www.infantnutritioncouncil.com</p>	<p>https://australiancheese.org</p>	<p>http://dairygoats.org.au</p>	<p>https://www.goatindustrycouncil.com.au</p>

DAIRY – NATIONAL

NATIONAL



CAMEL MILK ASSOCIATION OF
AUSTRALIA

National




Producers – Education and Information

<https://www.facebook.com/camelmilkassociationaustralia/>

DAIRY – STATE

There are two state-based dairy organisations and a state chapter

STATE

		
WAFARMERS DAIRY COUNCIL	WESTERN DAIRY	DAIRY INDUSTRY ASSOCIATION OF AUSTRALIA
State	State (Regional Program)	State Chapter
Dairy – Farmer Advocacy	Dairy – Farmers	Dairy Processing Professionals
https://wafarmers.org.au/	https://www.dairyaustralia.com.au/western-dairy	https://diaa.asn.au

DAIRY – WA PRE/POST FARMGATE

Western Dairy is part of the well resourced Dairy Australia



DETAILS	
NAME	WESTERN DAIRY – DAIRY AUSTRALIA
ADDRESS	PO Box 5066 Bunbury, WA 6230
PHONE	+61 8 9778 5111
EMAIL	admin@westerndairy.com.au
WEBSITE	https://www.dairyaustralia.com.au/western-dairy
# OF STAFF	5-10
# OF BOARD	8
# OF MEMBERS	~140 farmers
FOUNDED	TBD
COVERAGE	WA Dairy farmers

RESOURCES/PUBLICATIONS

- Access to all Dairy Australia research
- Information across farm and animals, feed, nutrition, farming practices, farm business,
- Reports (e.g. Australian Dairy Sustainable Packaging Roadmap, Dairy Food Waste Action Plan, Industry Reports Situation and Outlook, Input monitors, Hay report, Grain Report, Production Stats, Sales stats, Export stats)
- Who makes what? (Directory)
- ...

FUNDING MODEL/INCOME STREAMS

- Levy + Government Co-funds, grants
- WA DPIRD funding
- Revenue – Donations and grants ~\$800-\$1m annually

MEMBERSHIP FEES/CHARGES

Levy

PROFILE

Western Dairy is a not-for-profit organisation funded by dairy farmer levies which are matched by the Australian Government and channelled through Dairy Australia.

MISSION

Vision: a vibrant, profitable and responsible dairy industry in Western Australia based on dairy farmers having the business acumen and capacity to value opportunities.

ACTIVITIES/SERVICES WA SPECIFIC

- Extension Hub
- Education and Extension – Events Programs
- Dairy Farm Monitor Program support
- Dairy Business Network (DBN) discussion groups
- DairyHub (technical team)
- Science – Seed Performance, Calf health
- Environment – DairyCare (effluent reviews)
- Dairy Futures – Young Dairy Network
- Relationships: DPIRD, WA Farmers – Dairy, South Regional TAFE, SWDC, DWER, SWCC

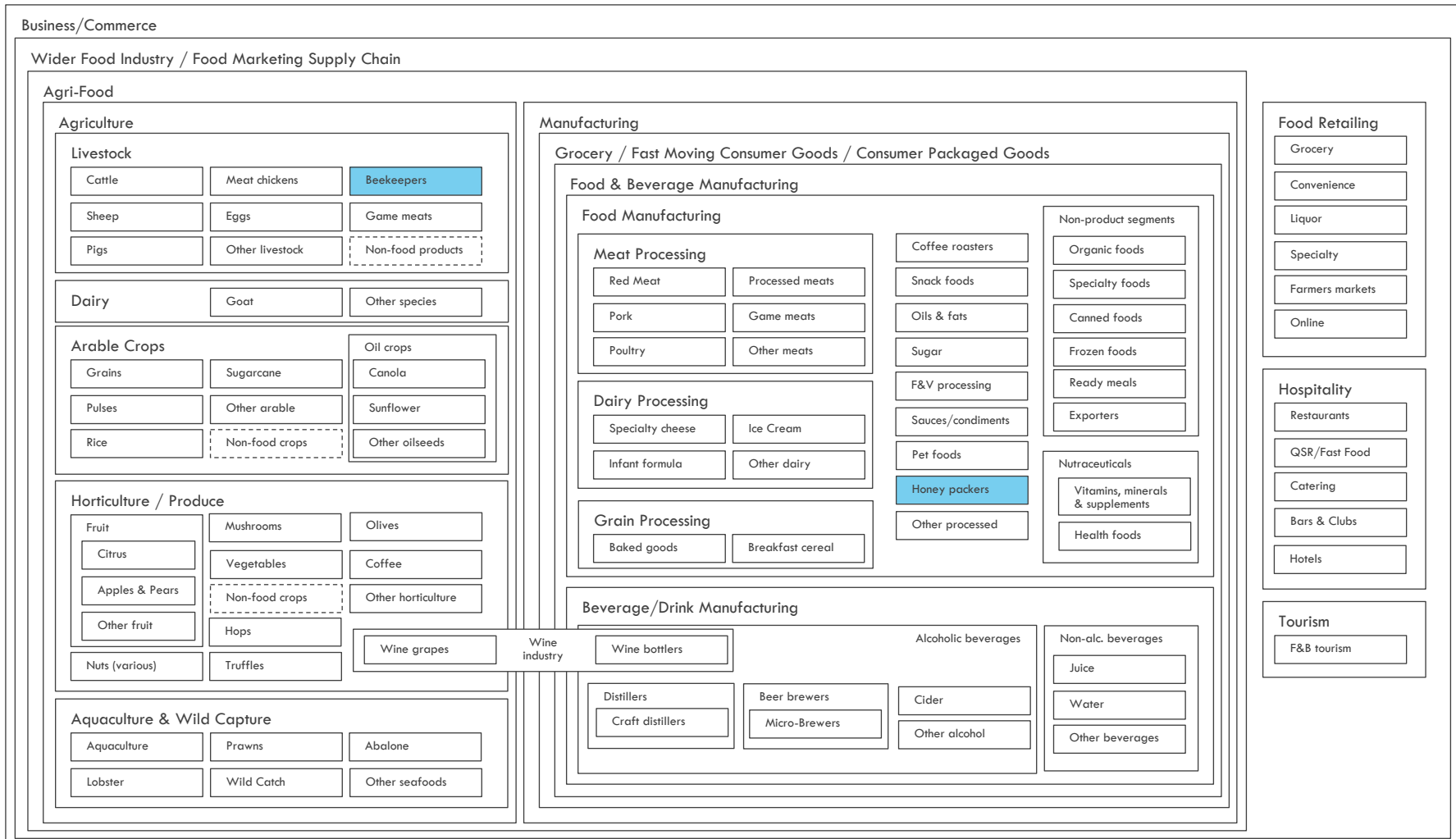
DAIRY – WA POST FARMGATE PROCESSING

ADF represents the larger dairy processing firms



DETAILS		RESOURCES/PUBLICATIONS	PROFILE
NAME	Australian Dairy Products Federation	<ul style="list-style-type: none"> - Milk Value Portal - Quarterly Insights - Global Market Update - Trends reports - Milk Supply Agreements by region - Dairy Code of Conduct 	<p>The Australian Dairy Products Federation (ADPF) is the national peak policy body representing commercial, post farm-gate members of the Australian dairy industry, including processors, traders and marketers of Australian dairy products. Our members process more than 90% of Australian milk volumes and provide dairy products for both domestic and export markets.</p>
ADDRESS	PO Box 3027 Dendy, VIC 3186		
PHONE	+61 3 8621 4260		
EMAIL	info@adpf.org.au		
WEBSITE	https://adpf.org.au https://milkvalue.com.au https://www.dairyplan.com.au	FUNDING MODEL/INCOME STREAMS	MISSION
# OF STAFF	TBD	<ul style="list-style-type: none"> - Australian Dairy Industry Council - Levies - Other 	<p>Strived to protect and promote dairy for the future success of dairy processors, providing a trusted source of advice and lead on public advocacy to government and the community, on the economic, social and health benefits of dairy.</p>
# OF EXEC	7	MEMBERSHIP FEES/CHARGES	ACTIVITIES/SERVICES
# OF MEMBERS	16	TBD	<ul style="list-style-type: none"> - Advocacy and public policy - Strategic communications and stakeholder engagement - Inquiry submission - Participating in industry initiatives to advance Australian dairy - Education tools and resources
FOUNDED	1990		
COVERAGE	Dairy processors (including WA based operations of Bega, Brownes, Lactalis) 90% of milk volume		






HONEY



A large number of organisations have some level of responsibility for honey in Western Australia

HONEY




NATIONAL LEVEL

 <p>Australian Honey Bee Industry Council</p>	 <p>AUSTRALIAN MANUKA HONEY ASSOCIATION</p>		<p>HONEY PACKERS AND MARKETEERS ASSOCIATION OF AUSTRALIA INC.</p>	<p>Crop Pollination Association Inc.</p>	 <p>CRC HONEY BEE PRODUCTS</p>
 <p>AgriFutures[®] Australia</p>					

STATE/REGIONAL LEVEL

 <p>BICWA BEE INDUSTRY COUNCIL OF WESTERN AUSTRALIA</p>		 <p>WABA</p>	 <p>WAFARMERS Beekeepers</p>	 <p>apc AGRICULTURAL PRODUCE COMMISSION Supporting Producers' Initiative</p> <p>Beekeepers</p>	

Western Australia has strong industry representation for honey

	ON-FARM	POST-FARMGATE
NATIONAL		 AUSTRALIAN MANUKA HONEY ASSOCIATION HONEY PACKERS AND MARKETERS ASSOCIATION OF AUSTRALIA INC.
STATE		

HONEY

Honey is well represented at the national and state level

SECTOR OVERVIEW

PEAK

SUB -SECTORS

R&D / QUASI/ GOVERNMENT

NATIONAL



AUSTRALIAN
MANUKA
HONEY
ASSOCIATION



HONEY PACKERS AND
MARKETERS
ASSOCIATION OF
AUSTRALIA INC.

Crop Pollination Association Inc.



STATE



Profiled



WAFARMERS
Beekeepers








Beekeepers

REGIONAL

HONEY

Honey is supported across the supply chain at all levels

NATIONAL

 <p>Australian Honey Bee INDUSTRY COUNCIL</p>	 <p>AUSTRALIAN MANUKA HONEY ASSOCIATION</p>	 <p>CRC HBP HONEY BEE PRODUCTS</p>	<p>Honey Packers and Marketers Association of Australia Inc.</p>
<p>AUSTRALIAN HONEY BEE INDUSTRY COUNCIL (AHBIC)</p>	<p>AUSTRALIAN MANUKA HONEY ASSOCIATION</p>	<p>CRC HONEY BEE PRODUCTS*</p>	<p>HONEY PACKERS AND MARKETERS ASSOCIATION OF AUSTRALIA INC.</p>
<p>National</p>	<p>National</p>	<p>National (based in WA)</p>	<p>National</p>
<p>Peak - Advocacy</p>	<p>Peak – Advocacy, Standards</p>	<p>Research</p>	<p>Peak - Packers</p>
<p>https://honeybee.org.au</p>	<p>https://manukaaustralia.org.au</p>	<p>https://www.crchoneybeeproducts.com</p>	<p>-</p>
<p>Crop Pollination Association Inc.</p>			
<p>CROP POLLINATION ASSOCIATION OF AUSTRALIA INC</p>	<p>AUSTRALIAN QUEEN BEE BREEDERS' ASSOCIATION (AQBBA)</p>	<p>AGRIFUTURES HONEY BEE AND POLLINATION</p>	
<p>National</p>	<p>National</p>	<p>National</p>	
<p>Info sharing</p>	<p>Info sharing</p>	<p>Funding, levy, RD&E</p>	
<p>https://www.aussiepollination.com.au</p>	<p>https://aqbba.org.au</p>	<p>https://agrifutures.com.au/rural-industries/honey-bee-pollination/</p>	

* Funding ended 2022

HONEY

Honey producers are represented in WA

STATE/REGIONAL

 <p>Beekeepers</p>			 <p>WABA</p>
<p>APCWA – BEEKEEPERS</p>	<p>BEE INDUSTRY COUNCIL OF WESTERN AUSTRALIA (BICWA)</p>	<p>WA APIARISTS' SOCIETY (WAAS)</p>	<p>WA BEEKEEPERS ASSOC (WABA)</p>
<p>State</p>	<p>State</p>	<p>State</p>	<p>State</p>
<p>Pest and disease surveillance</p>	<p>Peak – Advocacy*</p>	<p>Beekeepers – information, training</p>	<p>Commercial/hobby beekeepers – Advoc, Educ, Training, Research</p>
<p>https://apcwa.org.au/producers-committees/beekeepers</p>	<p>https://www.bicwa.com.au</p>	<p>https://waas.org.au</p>	<p>https://www.waba.com.au</p>
 <p>Department of Primary Industries and Regional Development</p>			
<p>DEPARTMENT OF PRIMARY INDUSTRIES AND REGIONAL DEVELOPMENT</p>	<p>WAFARMERS BEEKEEPERS COUNCIL</p>		
<p>State</p>	<p>State</p>		
<p>Quality assurance, nutrition research</p>	<p>Advocacy – Commercial Beekeepers</p>		
<p>https://www.agric.wa.gov.au/livestock-animals/livestock-species/bees</p>	<p>https://wafarmers.org.au/</p>		

* Formed in 2015 by members of WWAS, WABA and WA Farmers - Beekeepers

HONEY

BICWA represent the apiarists and producers of honey in WA

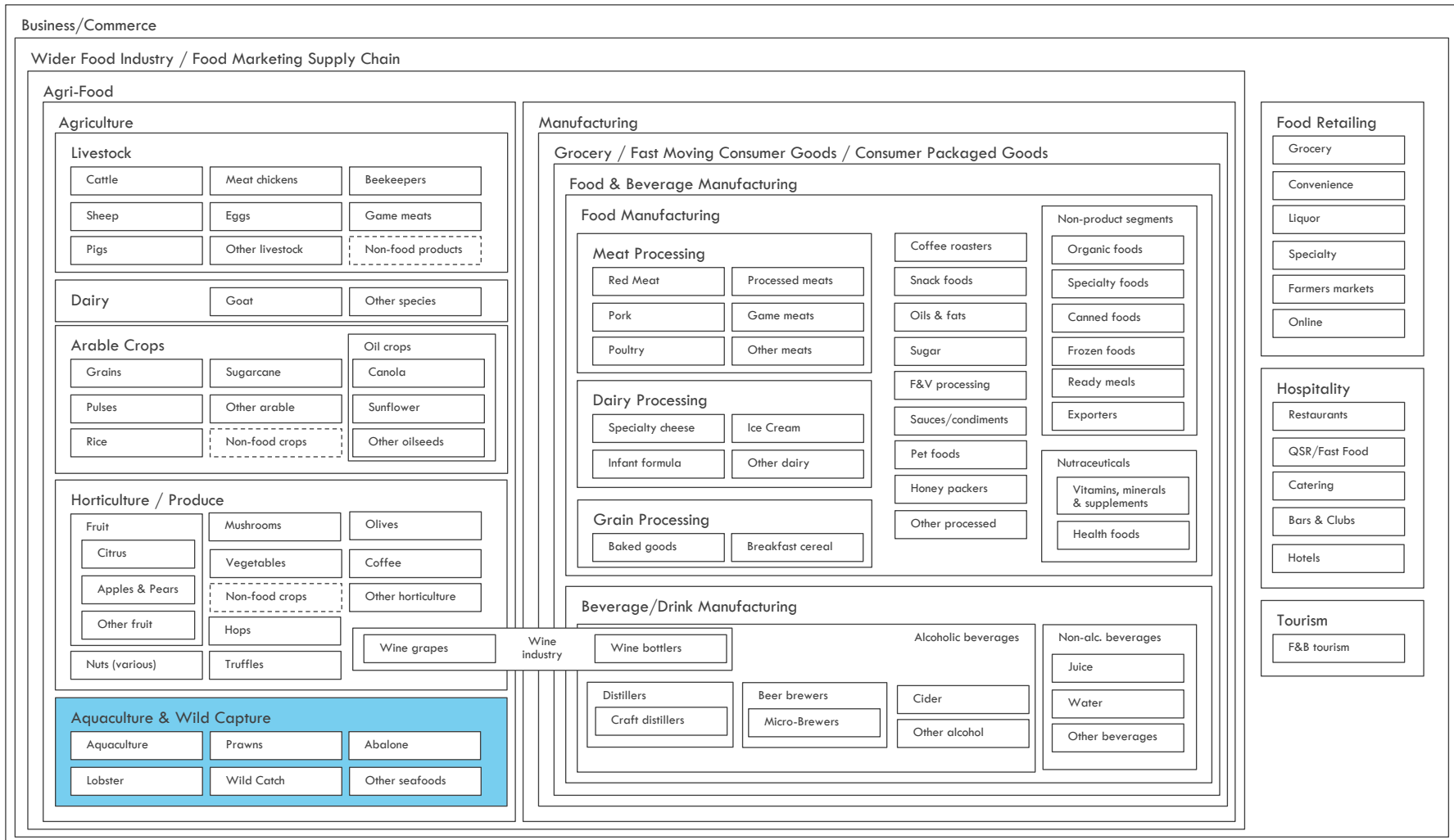


DETAILS	
NAME	BEE INDUSTRY COUNCIL OF WESTERN AUSTRALIA (BICWA)
ADDRESS	WA
PHONE	-
EMAIL	info@bicwa.com.au
WEBSITE	https://www.bicwa.com.au
# OF STAFF	4
# OF BOARD	6
# OF MEMBERS	Formed by members of WAAS (800 memberfs) WABA and WA Farmers - Beekeepers
FOUNDED	2015
COVERAGE	Beekeepers, Apiarists, processors

RESOURCES/PUBLICATIONS
<ul style="list-style-type: none"> - Research reports - Conference - Events - Beekeeping certificate - Workshop
FUNDING MODEL/INCOME STREAMS
<ul style="list-style-type: none"> - Membership fees - Voluntary Contribution - Sponsorship
MEMBERSHIP FEES/CHARGES
Beekeepers free Alliance Members \$1,000/yr (non-profit) Alliance Members \$2,000/yr (profit) Friend of \$60/y

PROFILE
The Bee Industry Council of Western Australia is the peak body leading a vibrant, dynamic, diverse and profitable bee industry in WA.
OBJECTIVE
To foster, promote and enhance a sustainable bee industry in Western Australia and to protect the interests of producers and co- dependent industries and organisations.
ACTIVITIES/SERVICES
<ul style="list-style-type: none"> - Provide support to the WA bee industry, producers and aligned organisations in the development of their Industry via leadership, advocacy and active participation in education, policy and planning. - Biosecurity, training and research




SEAFOOD



A large number of organisations have some level of responsibility for seafood in Western Australia

SEAFOOD

NATIONAL LEVEL

 Seafood Industry Australia The Voice of Australian Seafood		 Abalone Council Australia Ltd	 AUSTRALIAN SOUTHERN BLUEFIN TUNA INDUSTRY ASSOCIATION LTD (ASBTIA)	 AUSTRALIAN Prawn Farmers Association	
					
					

STATE/REGIONAL LEVEL

 WAFIC WESTERN AUSTRALIAN FISHING INDUSTRY COUNCIL INC.	 ACWA AQUACULTURE COUNCIL OF WESTERN AUSTRALIA	 Western Rock Lobster World leading sustainable fishery	 Southern Seafood Producers WA	 ABALONE INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA	 SHARK BAY PRAWN TRAWLERS ASSOCIATION INC
 Professional Fishermen's Association (PFAs x20)		 WESTERN AUSTRALIAN MARINE SCIENCE INSTITUTION			

Western Australia has no obvious gaps in seafood industry representation at the post-farmgate level



SEAFOOD – NATIONAL BODIES


NATIONAL AGENCIES

		
SEAFOOD INDUSTRY AUSTRALIA	COMMONWEALTH FISHERIES ASSOCIATION	FISHERIES RESEARCH AND DEVELOPMENT CORPORATION
National	National	National
Peak - Advocacy	Peak - Advocacy	Peak - R&D (RRDC)
https://seafoodindustryaustralia.com.au https://www.greataustralianseafood.com.au/	https://comfish.com.au	https://www.frdc.com.au

SEAFOOD

The seafood sector is well represented in the State

SEAFOOD AGENCIES

			
<p>WESTERN AUSTRALIA FISHING INDUSTRY COUNCIL</p>	<p>THE WESTERN ROCK LOBSTER</p>	<p>AQUACULTURE COUNCIL OF WA</p>	<p>SOUTHERN SEAFOOD PRODUCERS WA</p>
<p>State</p>	<p>State</p>	<p>State</p>	<p>Regional</p>
<p>Advocacy – PEAK</p>	<p>Advocacy – Wild</p>	<p>Advocacy</p>	<p>Advocacy</p>
<p>https://www.wafic.org.au</p>	<p>https://westernrocklobster.org</p>	<p>https://www.aquaculturecouncilwa.com</p>	<p>https://www.southernseafoodproducerswa.org.au</p>
	<p>SHARK BAY PRAWN TRAWLERS</p>	<p>Professional Fishermen's Association</p>	
<p>ABALONE INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA</p>	<p>SHARK BAY PRAWN TRAWLERS ASSOCIATION INC</p>	<p>PROFESSIONAL FISHERMEN'S ASSOCIATION</p>	<p>RECREATIONAL FISHING WA</p>
<p>State</p>	<p>Regional</p>	<p>Regional (x20)</p>	<p>State</p>
<p>Advocacy – Wild catch</p>	<p>Advocacy, Management</p>	<p>Advocacy</p>	<p>Advocacy - Fishers</p>
<p>https://www.abalonewa.com.au</p>	<p>https://sharkbayprawns.com</p>	<p>https://www.wafic.org.au/who-we-are/our-members/professional-fishing-associations/</p>	<p>https://recfishwest.org.au</p>

SEAFOOD – WA PRE/POST FARMGATE SEAFOOD INDUSTRY

WAFIC is the peak organisation in WA



DETAILS	
NAME	WESTERN AUSTRALIA FISHING INDUSTRY COUNCIL
ADDRESS	Level 1 56 Marine Terrace Fremantle 6160 Western Australia
PHONE	+61 8 9432 7777
EMAIL	admin@wafic.org.au
WEBSITE	https://www.wafic.org.au
# OF STAFF	10
# OF BOARD	9
# OF MEMBERS	20 PFA'S*, 6 Sector bodies, RecFishWest
FOUNDED	1970
COVERAGE	Commercial fishers, farmers, processors, traders seafood (aquaculture and wild)

RESOURCES/PUBLICATIONS
<ul style="list-style-type: none"> - Safety and training information sharing - Cooking and recipe videos - Education resources - News
FUNDING MODEL/INCOME STREAMS
<ul style="list-style-type: none"> - Income from GVP*[^] \$2.65m - Membership fees \$20k - Project Management fees \$103k - Other \$327k - Total revenue \$3.1m (2021)
MEMBERSHIP FEES/CHARGES
<p>LICENCE HOLDERS</p> <p>Nomination Fees \$110 on application</p> <p>Annual subscription \$275</p> <p>ASSOCIATES</p> <p>Application fee \$110</p> <p>Annual subscription \$110</p>

PROFILE
WAFIC is the peak industry body representing professional fishing, pearling and aquaculture enterprises, processors and exporters in Western Australia.
MISSION
<p>“WAFIC is the recognised peak body to protect, promote and support development of the commercial fishing industry.”</p> <p>WAFIC seeks to achieve its Mission’s objectives in an atmosphere of cooperation, to ensure the value, security and sustainability of commercial fishing, pearling and aquaculture in Western Australia.</p>
ACTIVITIES/SERVICES
<ul style="list-style-type: none"> - Resource Access and Industry Sustainability - Industry and Stakeholder Communications and Engagement - Building Community Support - Building Organisational Capacity - Information sharing (Species, COO, training, mental health) - Supporting events and activities (e.g. SeSafe) - Industry Awards - Collab’s with FRDC & DPIRD to develop RD&E programs - Grants of \$1.4m in 2021 – Marine Park Grants - MSC Program Collaboration with DPIRD \$14.5m program

* Professional Fishermen’s Association; ^ GVP = Gross Value of Production

SEAFOOD – WAFIC ORGANISATION SUMMARY

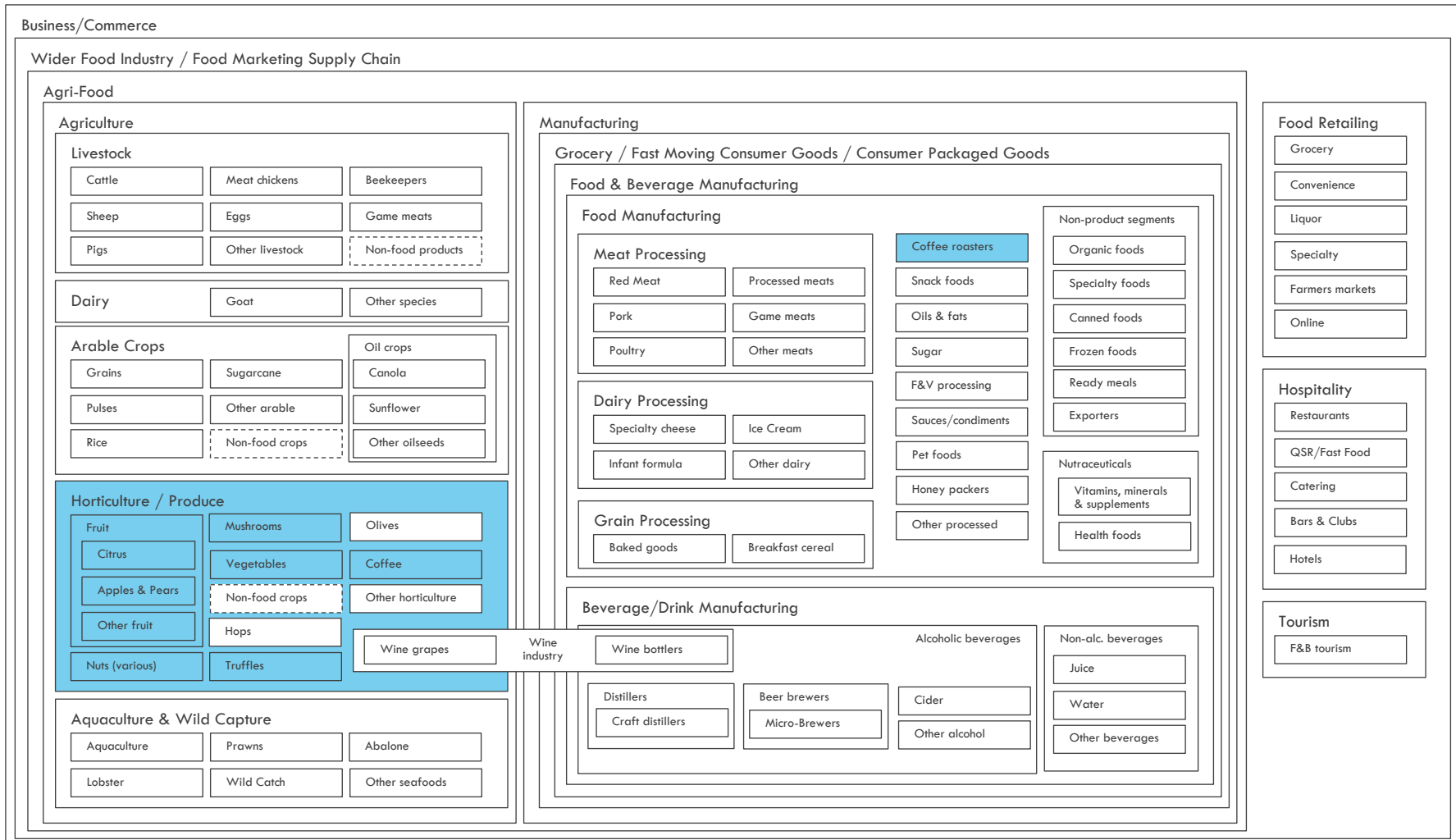
Seafood fishers, farmers and processors are included in WAFIC

WAFIC STRUCTURE



COMMERCIAL FISHERS AND PROCESSORS

PRODUCE



A large number of organisations have some level of responsibility at the national level for produce in Western Australia

PRODUCE

NATIONAL LEVEL

 National Farmers Federation	 Plant Health AUSTRALIA	 PCA Protected Cropping Australia	 Australian Native Food & Botanicals	 Hort Innovation	 AUSTRALIAN HORTICULTURAL EXPORTERS' AND IMPORTERS' ASSOCIATION
 Greenlife Industry Australia	 AMGA™ Australian Mushroom Growers' Assoc.	 AuSHS	 ATGA Australian Table Grape Association Inc.	 berries AUSTRALIA	 Citrus Australia
 Avocados Australia	 CHERRY GROWERS AUSTRALIA INC.	 Australian Blueberry Growers' Association	 raba Raspberries & Blackberries Australia	 STRAWBERRIES AUSTRALIA	 Summerfruit AUSTRALIA
 driedfruits australia	 AUSTRALIAN MANGOES	 ANIC australian nut industry council	 AUSTRALIAN MACADAMIA SOCIETY	 AUSTRALIAN MACADAMIAS The world's finest nut	 AUSVEG
 AUSTRALIAN ASPARAGUS	 Australian Truffle Industry Association	 ACTA AUSTRALIAN COFFEE TRADERS ASSOCIATION INC.	 AUSTRALIAN SUBTROPICAL COFFEE ASSOCIATION	 ASCA	 AUSTRALASIAN TEA ASSOCIATION
 Custard Apples Australia inc.	 ALGA	 PASSION FRUIT AUSTRALIA INC.	 Australian Processing Tomato Research Council Inc.	 APAL	

A large number of organisations have some level of responsibility at the state level for produce in Western Australia

PRODUCE

STATE/REGIONAL LEVEL

					
					
		See also Grower Groups profiled later			

Western Australia has a number of gaps in produce industry representation at the post-farmgate level



PRODUCE

Produce is well supported across the supply chain at the national level

NATIONAL

			
<p>HORT INNOVATION</p>	<p>AUSTRALIAN HORTICULTURAL EXPORTER'S AND IMPORTER'S ASSOC</p>	<p>PLANT HEALTH AUSTRALIA</p>	<p>PROTECTED CROPPING AUSTRALIA</p>
<p>National</p>	<p>National</p>	<p>National</p>	<p>National</p>
<p>Peak – R&D, Marketing (RRDC)</p>	<p>Peak – Directory, Trade</p>	<p>R&D, Regulation</p>	<p>Commercial – Advocacy, Educ</p>
<p>https://www.horticulture.com.au</p>	<p>https://www.horticulturetrade.com.au</p>	<p>https://www.planthealthaustralia.com.au</p>	<p>https://protectedcropping.net.au</p>
			
<p>AUSTRALIAN NATIVE FOOD AND BOTANICALS (ANFAB)</p>	<p>NATIONAL FARMERS' FEDERATION HORTICULTURE COUNCIL</p>	<p>GREENLIFE INDUSTRY AUSTRALIA</p>	<p>AUSTRALIAN SOCIETY OF HORTICULTURAL SCIENCE</p>
<p>National</p>	<p>National</p>	<p>National</p>	<p>National</p>
<p>Peak</p>	<p>Peak - Farmers</p>	<p>Peak - Nursery, Breeding all food, fibre</p>	<p>Peak – Promotion, science and industry</p>
<p>https://anfاب.org.au</p>	<p>https://nff.org.au</p>	<p>https://www.greenlifeindustry.com.au/</p>	<p>http://aushs.org.au</p>

PRODUCE

Fruit is well supported by industry bodies

NATIONAL

			
BERRIES AUSTRALIA LIMITED	AUSTRALIAN TABLE GRAPE ASSOCIATION (ATGA)	SUMMERFRUIT AUSTRALIA LIMITED (SAL)	CITRUS AUSTRALIA
National (WA resource)	National	National	National*
Peak – Growers	Peak - Growers	Peak - Growers	Peak - all
https://berries.net.au/	https://australiangrapes.com.au	https://summerfruit.com.au	https://citrusaustralia.com.au
			
AUSTRALIA MELON ASSOCIATION	CHERRY GROWERS AUSTRALIA INC	AUSTRALIAN MANGO INDUSTRY ASSOCIATION	DRIED FRUITS AUSTRALIA (DFA)
National	National	National	National
Peak – Advocacy, information, levy	Peak	Peak	Promotion – grower, processor, sales
https://www.melonsaustralia.org.au	https://www.cherrygrowers.org.au/	https://australian-mangoes.squarespace.com	https://www.driedfruitsaustralia.org.au

*Own membership fees; Must win tenders to get HortInnovation R&D funding via grower levies; NOTE Levies collected by DAWE, some goes to Plant Health Australia (Biosecurity), some Hort Innovation (R&D)

PRODUCE

...







NATIONAL

			
<p>AUSTRALIAN LYCHEE GROWERS ASSOCIATION</p>	<p>PASSIONFRUIT AUSTRALIA</p>	<p>AUSTRALIAN NUT INDUSTRY COUNCIL</p>	<p>AUSTRALIAN MACADAMIA SOCIETY</p>
<p>National</p>	<p>National</p>	<p>National</p>	<p>National</p>
<p>Peak - R&D*, Advocacy</p>	<p>Peak – Advocacy, RD&E, Breeding</p>	<p>Peak – Advocacy, RD&E*, Information</p>	<p>Peak – Advocacy, RD&E*, Information</p>
<p>https://www.australianlychee.com.au</p>	<p>https://passionfruitaustralia.org.au/</p>	<p>https://nutindustry.org.au</p>	<p>https://australianmacadamias.org</p>
			
<p>CUSTARD APPLES AUSTRALIA</p>	<p>AVOCADOS AUSTRALIA</p>	<p>AUSTRALIAN PROCESSING TOMATO RESEARCH COUNCIL INC.</p>	<p>APPLE AND PEAR</p>
<p>National</p>	<p>National</p>	<p>National</p>	<p>National</p>
<p>Peak – Advocacy, RD&E, Information</p>	<p>Peak – advocacy, information</p>	<p>Processors – R&D</p>	<p>Growers – R&D, Advocacy</p>
<p>http://www.custardapple.com.au</p>	<p>https://avocado.org.au</p>	<p>https://www.aptrc.asn.au</p>	<p>https://apal.org.au</p>

PRODUCE

Vegetables are well supported at the national level

NATIONAL

	<p>Australian Truffle Industry Association</p>		<p>AUSTRALIAN ASPARAGUS</p>
<p>AUSVEG</p>	<p>AUSTRALIAN TRUFFLE INDUSTRY ASSOCIATION</p>	<p>AUSTRALIAN MUSHROOM GROWERS ASSOCIATION</p>	<p>AUSTRALIAN ASPARAGUS COUNCIL</p>
<p>National</p>	<p>National</p>	<p>National</p>	<p>National</p>
<p>Peak –Growers</p>	<p>Peak – advice, advocacy, support</p>	<p>Peak –Advocacy</p>	<p>Peak - Growers</p>
<p>https://ausveg.com.au</p>	<p>https://truffleindustry.com.au/about-us/</p>	<p>https://australianmushroomgrowers.com.au</p>	<p>http://www.asparagus.com.au</p>
	 <p>AUSTRALIAN SUBTROPICAL COFFEE ASSOCIATION</p>		
<p>AUSTRALIAN COFFEE TRADERS INC</p>	<p>AUSTRALIAN SUBTROPICAL COFFEE ASSOCIATION</p>	<p>AUSTRALIAN SPECIALTY COFFEE ASSOCIATION</p>	<p>AUSTRALASIAN TEA ASSOCIATION</p>
<p>Large traders - networking, stds</p>	<p>Peak - grower to wholesaler</p>	<p>Specialty – info sharing, comps</p>	<p>National</p>
<p>National</p>	<p>National[^]</p>	<p>National</p>	<p>Peak</p>
<p>https://acta.org.au</p>	<p>https://www.astca.org</p>	<p>https://australianspecialtycoffee.com.au</p>	<p>https://australasianteaassociation.org</p>

PRODUCE

State agencies and the APC support the fruit industries in WA

STATE




 <p>Department of Primary Industries and Regional Development</p>	 <p>AGRICULTURAL PRODUCE COMMISSION <i>Supporting Producers' Initiative</i></p>	 <p>AGRICULTURAL PRODUCE COMMISSION <i>Supporting Producers' Initiative</i></p>	 <p>AGRICULTURAL PRODUCE COMMISSION <i>Supporting Producers' Initiative</i></p>
DEPARTMENT OF PRIMARY INDUSTRIES AND REGIONAL DEVELOPMENT	APCWA - POME, CITRUS & STONEFRUIT	APCWA - TABLE GRAPE	APCWA – STRAWBERRIES
State	State	State	State
R&D, Extension	Funding, programs, R&D*	Funding*, develop programs, R&D	Funding, develop programs, R&D [^]
https://www.agric.wa.gov.au/crops/horticulture/fruit	https://apcwa.org.au/producers-committees/pome-citrus-and-stonefruit	https://apcwa.org.au/producers-committees/table-grape	https://apcwa.org.au/producers-committees/strawberry
 <p>AGRICULTURAL PRODUCE COMMISSION <i>Supporting Producers' Initiative</i></p>	 <p>AGRICULTURAL PRODUCE COMMISSION <i>Supporting Producers' Initiative</i></p>		
APCWA – AVOCADO	APCWA – CARNARVON BANANA	WA CITRUS	POME WEST
State	State	State	State
Funding, programs, R&D	Funding, develop programs, R&D	Citrus* - Advisory, R&D	APC subcommittee - Strategy
https://apcwa.org.au/producers-committees/avocado	https://apcwa.org.au/producers-committees/carnarvon-banana	https://wacitrus.com.au	http://pomewest.net.au

* Sub-committee of APC Pome, Citrus and Stonefruit and regional advisory body to Citrus Australia; ^ Industry Development Officer (DPIRD)

PRODUCE

...

STATE/REGIONAL

	<p>Strawberry Growers Association of WA</p>		
<p>WA STONEFRUIT</p>	<p>STRAWBERRY GROWERS ASSOCIATION OF WA</p>	<p>FRUIT WEST COOPERATIVE LTD</p>	<p>CARNARVON GROWERS ASSOCIATION</p>
<p>State</p>	<p>State</p>	<p>State</p>	<p>Region</p>
<p>Peak[^] - Promotion</p>	<p>R&D, Advocacy, Educ</p>	<p>IP Management of Bravo</p>	<p>Peak Hort – Regional growers</p>
<p>http://wastonefruit.com.au</p>	<p>-</p>	<p>www.fruitwest.com.au</p>	<p>https://cga.org.au</p>

[^] website not updated; NOTE: Generalist grower groups are profiled later in the document

VEGETABLES

Vegetables are also well supported by the State organisations

STATE

		
<p>VEGETABLE GROWERS ASSOCIATION</p>	<p>WA POTATOE GROWERS ASSOCIATION</p>	<p>TRUFFLE PRODUCERS WESTERN AUSTRALIA</p>
<p>State</p>	<p>State</p>	<p>State</p>
<p>Growers – Advocacy, R&D, Marketing</p>	<p>Growers – Advoc, R&D, Marketing</p>	<p>Peak – Info sharing, promotion</p>
<p>https://vegetableswa.com.au</p>	<p>https://www.todatoes.com.au</p>	<p>https://www.tpwa.com.au https://www.trufflekeruffle.com.au</p>
		
<p>APCWA – POTATO</p>	<p>APCWA – VEGETABLE</p>	
<p>State</p>	<p>State</p>	
<p>Funding*, develop programs, R&D</p>	<p>Funding*, develop programs, R&D</p>	
<p>https://apcwa.org.au/producers-committees/potato</p>	<p>https://apcwa.org.au/producers-committees/vegetable</p>	

* Many services provided by VegetablesWA

VEGETABLES – WA PRE/POST FARMGATE

Vegetables WA is the leading vegetable industry body

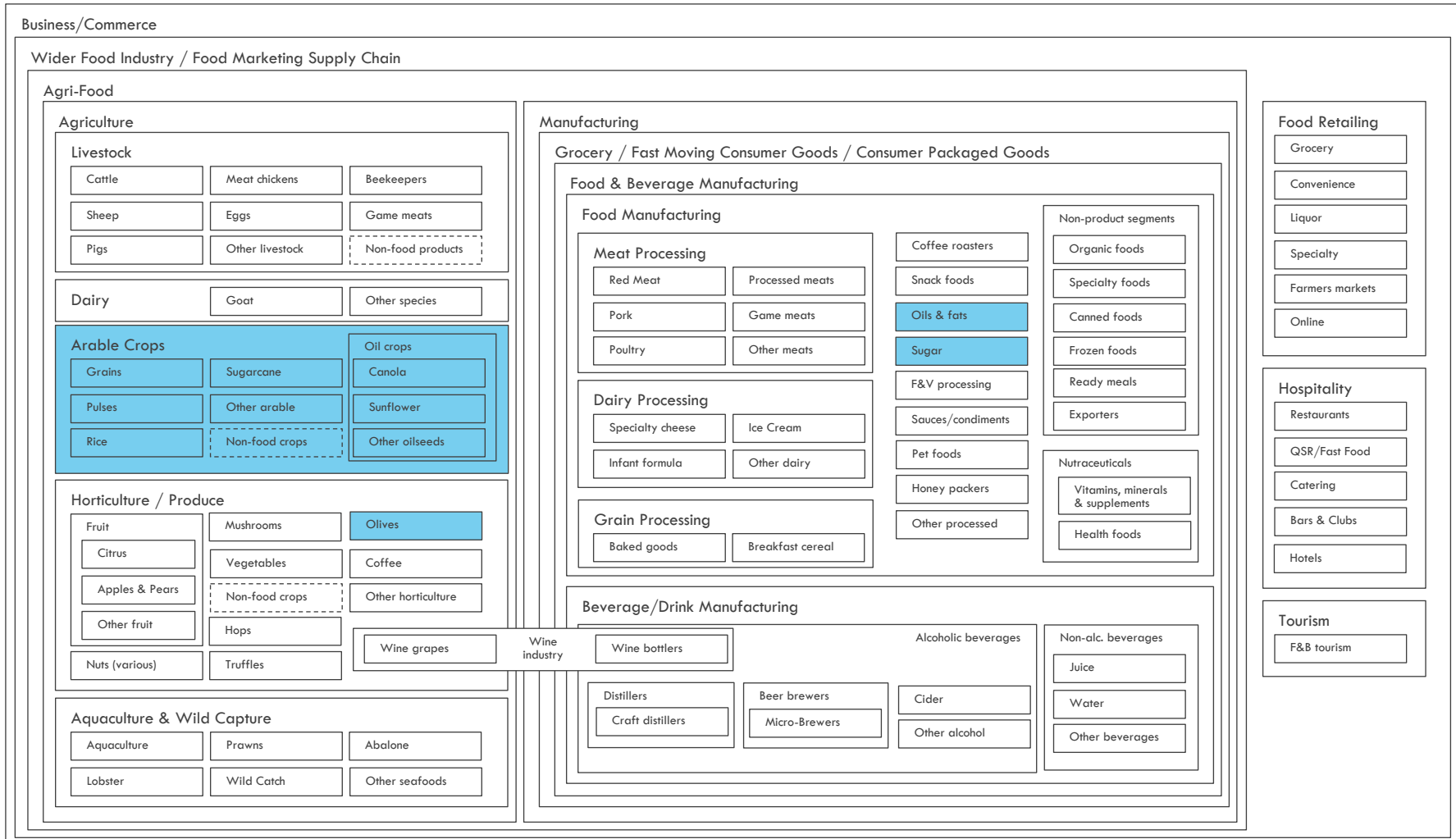


DETAILS	
NAME	Vegetable Growers Association
ADDRESS	702-704 Murray Street West Perth WA 6005
PHONE	+61 8 9486 7515
EMAIL	manus.stockdale@vegetableswa.com.au
WEBSITE	https://vegetableswa.com.au
# OF STAFF	8
# OF BOARD	9
# OF MEMBERS	900+ All vegetable growers in WA
FOUNDED	~1950
COVERAGE	All vegetable growers in WA

RESOURCES/PUBLICATIONS
<ul style="list-style-type: none"> - Annual conference - Workshops - Good Practice Guides - Monthly online video - WA Grower Magazine (seasonally) - Newsletters
FUNDING MODEL/INCOME STREAMS
<ul style="list-style-type: none"> - Fee for service (first sale of product) to APC (Agriculture Produce Commission) and VPC (Vege Producers Committee) - Fee for service (R&D projects) to State Government - Grants - Sponsorship (events, workshops)
MEMBERSHIP FEES/CHARGES
<ul style="list-style-type: none"> - Fee for service (first sale of product)

PROFILE
<p>vegetablesWA has been the peak industry body representing vegetable growers in Western Australia for more than 70 years</p>
MISSION
<p>To assist vegetable growers, industry and government to maintain a profitable and sustainable vegetable industry.</p>
ACTIVITIES/SERVICES
<ul style="list-style-type: none"> - Advocacy and representation - Research and development extension - Value chain - Export development - Benchmarking - Quality assurance - Marketing - Business services (HR Support)

ARABLE



A large number of organisations have some level of responsibility for arable crops at the national level in Western Australia

GRAINS/ARABLE CROPS

NATIONAL LEVEL

					
					
					See also Grower Groups profiled later

A large number of organisations have some level of responsibility for arable crops at the state level in Western Australia

GRAINS/ARABLE CROPS

STATE/REGIONAL LEVEL

					
					
		Crop & Pasture Groups	Catchment Committees	Other Improvement Groups	Top Crop Groups
NORTHERN AUSTRALIAN SOYBEAN INDUSTRY ASSOCIATION (NASIA)				Far Eastern Agricultural Research Group (FEAR)	

Western Australia has a number of gaps in post farmgate grain processing industry representation at the post-farmgate level

	ON-FARM	POST-FARMGATE
NATIONAL		
STATE		

ARABLE – GRAINS

NATIONAL AGENCIES

			
<p>GRAINS RESEARCH AND DEVELOPMENT CORPORATION</p>	<p>AUSTRALIAN EXPORT GRAINS INNOVATION CENTRE (via GRDC, DPIRD)</p>	<p>GRAIN TRADE AUSTRALIA*</p>	<p>GRAIN GROWERS ASSOCIATION</p>
<p>National</p>	<p>National</p>	<p>National</p>	<p>National</p>
<p>Peak – R&D (RRDC)</p>	<p>Export Innovation – Grains, Pulses</p>	<p>Trade, Rules, Standards, Training</p>	<p>Advocacy - Growers</p>
<p>https://grdc.com.au</p>	<p>https://www.aegic.org.au</p>	<p>https://www.graintrade.org.au</p>	<p>https://www.graingrowers.com.au/</p>
			
<p>GRAIN PRODUCERS AUSTRALIA</p>	<p>GRAINS & LEGUMES NUTRITION COUNCIL</p>	<p>GRAINS AUSTRALIA LIMITED (GAL)^</p>	
<p>National</p>	<p>National</p>	<p>National</p>	
<p>Advocacy – Growers (Grain, seed, oil)</p>	<p>Consumer Information, Education</p>	<p>Industry Good, Market Access</p>	
<p>https://www.grainproducers.com.au</p>	<p>https://www.gln.org.au</p>	<p>https://grainsaustralia.com.au http://www.gimaf.com.au</p>	

* All Grain Handlers and Traders in WA Members; ^Funded by GRDC

ARABLE – OTHER





NATIONAL AGENCIES

			
<p>PULSE AUSTRALIA*</p>	<p>AGRIFUTURES RICE</p>	<p>AUSTRALIAN HEMP COUNCIL</p>	<p>AUSTRALIAN INDUSTRIAL HEMP ALLIANCE</p>
<p>National</p>	<p>National</p>	<p>National (WA Council)</p>	<p>National (QLD VIC)</p>
<p>Peak – Advocacy, Research</p>	<p>Levy, RD&E</p>	<p>Peak – Advocacy</p>	<p>Advocacy</p>
<p>https://www.pulseaus.com.au</p>	<p>https://agrifutures.com.au/rural-industries/rice/</p>	<p>https://australianhempcouncil.org.au</p>	<p>http://hempalliance.org.au/</p>
			
<p>AUSTRALIAN SUGAR MILLING COUNCIL</p>	<p>SUGAR RESEARCH AUSTRALIA</p>	<p>BARLEY AUSTRALIA</p>	
<p>National</p>	<p>National</p>	<p>National</p>	
<p>Advocacy – Manufacturers & Exporters</p>	<p>Peak – R&D (RRDC)</p>	<p>Malting – malting standards,</p>	
<p>https://asmc.com.au</p>	<p>https://sugarresearch.com.au</p>	<p>https://www.barleyaustralia.com.au</p>	

* Members: Unigrain







ARABLE – OILS AND FATS

NATIONAL ASSOCIATION

			
<p>AUSTRALIAN OILSEEDS FEDERATION (AOF)</p>	<p>SOY AUSTRALIA LIMITED</p>	<p>AUSTRALIAN SUNFLOWER ASSOCIATION (ASA)</p>	<p>AUSTRALIAN OLIVE ASSOCIATION</p>
<p>National</p>	<p>National</p>	<p>National</p>	<p>National</p>
<p>Peak – Promote, Educ, RD&E, Standards</p>	<p>Peak – Promote, Educ, R&D</p>	<p>Peak – Promote, Educ, R&D</p>	<p>Peak – Advocacy, Education</p>
<p>http://www.australianoilseeds.com</p>	<p>http://www.australianoilseeds.com/soy_australia</p>	<p>https://www.bettersunflowers.com.au</p>	<p>https://australianolives.com.au</p>

ARABLE – GRAINS

STATE/REGIONAL

 <p>Oats Council Oilseeds Council Barley Council Wheat Council Pulse Council</p> <p>GRAINS INDUSTRY ASSOCIATION OF WA (GIWA)</p> <p>State</p> <p>Peak - R&D Grains/Pulses</p> <p>www.giwa.org.au/</p>	 <p>WA GRAINS GROUP INC</p> <p>State</p> <p>Growers – Supply chain costs</p> <p>https://wagrainsgroup.com</p>	 <p>COGGO</p> <p>COUNCIL OF GRAIN GROWERS ORGANISATION</p> <p>State</p> <p>Growers – R&D Investment</p> <p>https://www.coggo.net.au</p>	 <p>WESTERN AUSTRALIAN NO-TILLAGE FARMERS ASSOCIATION (WANTFA)</p> <p>State</p> <p>Growers – R&D*</p> <p>https://www.wantfa.com.au</p>
 <p>WAFARMERS LIVESTOCK COUNCIL</p> <p>State</p> <p>Grains – Farmer Advocacy</p> <p>https://wafarmers.org.au/</p>	<p>NORTHERN AUSTRALIAN SOYBEAN INDUSTRY ASSOCIATION (NASIA)</p> <p>NORTHERN AUSTRALIAN SOYBEAN INDUSTRY ASSOCIATION (NASIA)</p> <p>States</p> <p>Advocacy, R&D</p> <p>-</p>	 <p>WEST AUSTRALIAN OLIVE COUNCIL INC (WAOC)</p> <p>Peak – Advo and Information Sharing</p> <p>State</p> <p>https://australianolives.com.au/about-waoc/</p>	

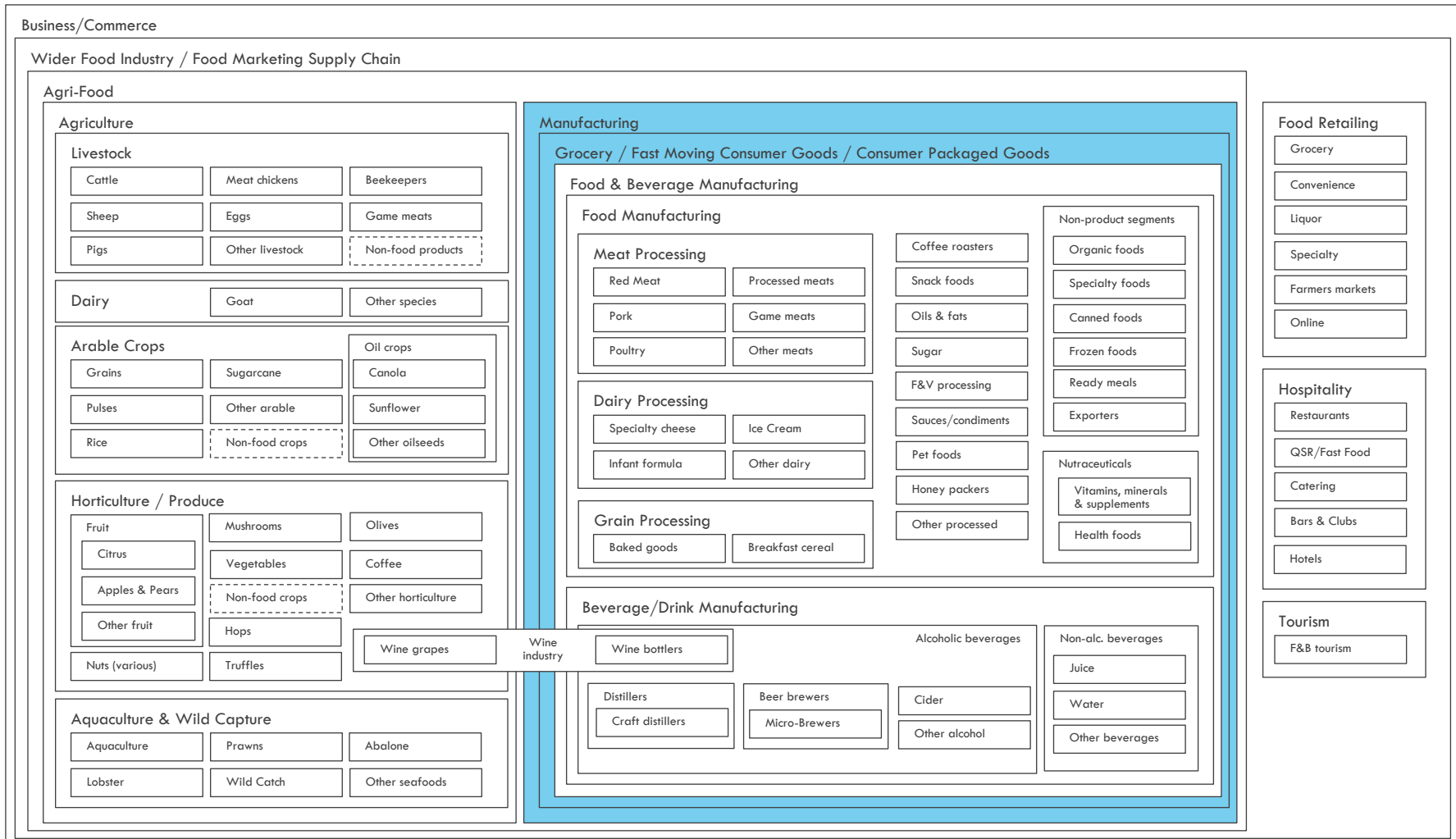
ARABLE

STATE/REGIONAL

			
<p>INDUSTRIAL HEMP WA ASSOCIATION INC. (IHEMPWA)</p>	<p>WA HEMP GROWERS' CO-OP LTD (HEMPGRO)</p>		
<p>State</p>	<p>State</p>		
<p>Peak - Advocacy</p>	<p>Advocacy, R&D, Operational</p>		
<p>https://ihempwa.org</p>	<p>https://hempgro.com.au/about-us</p>		
			
<p>SOUTH EAST PREMIUM WHEATGROWERS ASSOCIATION</p>	<p>ESPERANCE ZONE INNOVATION GROUP</p>	<p>LIEBE GROUP</p>	<p>SOUTHERN DIRT</p>
<p>Regional – Esperance Port Zone</p>	<p>Regional</p>	<p>Regional</p>	<p>Region</p>
<p>Grains – Grower advocacy</p>	<p>Grains – Data, technology</p>	<p>Arable – R&D, Extension</p>	<p>Arable – R&D, Extension</p>
<p>https://sepwa.org.au</p>	<p>https://www.ezi.org.au</p>	<p>https://www.liebegrp.org.au</p>	<p>https://southerndirt.com.au</p>

NOTE: others arable support organisations included in the Grower Group Alliance section


PROCESSING – HIGH LEVEL OR TOTAL F&B MANUFACTURING INDUSTRY



No organisations have responsibility for food and beverage manufacturing in Western Australia


FOOD & BEVERAGE MANUFACTURING/PROCESSING

NATIONAL LEVEL

STATE/REGIONAL LEVEL

Western Australia has a gap in state level food and beverage manufacturing industry representation

	ON-FARM	POST-FARMGATE
NATIONAL	NOT APPLICABLE COVERED ELSEWHERE	
STATE	NOT APPLICABLE COVERED ELSEWHERE	<div style="border: 2px dashed red; padding: 10px; text-align: center;"> <p>GAP WA F&B MANUFACTURERS</p> </div>

FOOD & BEVERAGE MANUFACTURING/PROCESSING

Excludes the quasi-government food focused CRC's and Growth Centres (covered later in document)

NATIONAL AGENCIES

			
AI GROUP	FOOD AND BEVERAGE IMPORTERS ASSOCIATION (FBIA)	AUSTRALIAN FOOD AND GROCERY COUNCIL	PRIVATE LABEL MANUFACTURERS ASSOCIATION
National	National	National	National
Manufacturers – ALL* - advocacy, HR, events	Peak F&B Importers – advocacy	Peak - FMCG	Networking, Education
https://www.aigroup.com.au/sectors-and-advocacy/food-and-beverage/	http://www.fbiam.org.au/	https://www.afgc.org.au	https://www.plma.com.au
			
NATIONAL BAKING INDUSTRY ASSOCIATION	AUSTRALIAN FREEZE DRY HEALTH AND FUNCTIONAL FOOD ASSOCIATION	PET FOOD INDUSTRY ASSOCIATION OF AUSTRALIA	STOCK FEED MANUFACTURERS' COUNCIL OF AUSTRALIA
National	National	National [^]	National*
Peak – Advocacy, HR, Inform, Guides	Promotion	Peak – trade, standards	Peak
https://nbiam.org.au/nbia/	https://freedried.org.au	https://pfiaa.com.au	https://www.sfmca.com.au

* Cover all manufacturing sectors, with subgroups - Food and Beverage (400 members) and Confectionery; 300 staff

FOOD & BEVERAGE MANUFACTURING/PROCESSING

NATIONAL AGENCIES


INDEPENDENT FOOD DISTRIBUTORS AUSTRALIA
National
Manufacturers, Suppliers distrib into FS – advocacy, services, events
https://www.ifda.com.au

* Sealane Foodservice Member

PROCESSING – The AFGC represents large FMCG companies across Australia



AUSTRALIAN
FOOD &
GROCERY
COUNCIL

DETAILS		RESOURCES/PUBLICATIONS	PROFILE
NAME	Australian Food and Grocery Council	<ul style="list-style-type: none"> - Sustaining Australia: Food And Grocery Manufacturing 2030 - Sustaining Australia TV - State of the Industry Report - Product Information/Guides/Guidelines - Events/Conference - Trading Partner Forum - Food & Grocery Code of Conduct - Australian Grocery Academy 	<p>The AFGC is the voice of the Australian food and grocery supply industry and a valued service provider to our members. With advocacy at our core, we are structured to enable member companies to contribute to overall industry policy and strategy and to influence category-specific issues and services.</p>
ADDRESS	Unit 5G 65 Canberra Avenue Griffith ACT 2603		
PHONE	+61 (02) 6273 1466		
EMAIL	afgc@afgc.org.au		
WEBSITE	www.afgc.org.au		
# OF STAFF	5 (Leadership team), 18 total	FUNDING MODEL/INCOME STREAMS	MISSION
# OF BOARD	9 (Company Managers/CEO's)	<ul style="list-style-type: none"> - Membership fees/subs \$3.73m - Special project/Forum \$732k - Government Subsidies 418k - Conference \$407k - Sponsorship \$76k - Function revenue \$18k - Interest \$16k - Other \$11k - Total \$5.4m (2021) 	<p>Purpose: Sustaining Australia Vision: a thriving and trusted Australian food and grocery supply industry, delivering jobs, economic growth and helping people to live well. Mission: to be the voice of the Australian food and grocery industry and a valued service provider to members.</p>
# OF MEMBERS	199 (2021)		
FOUNDED	1995 (previously Food Technology Australia)		
COVERAGE	FMCG Full members (140), Associates (47) and Affiliates (12); Primarily MNC's		
	Total workforce in FG manufacturing is 16,000 businesses & 270,000 people, \$133b industry		
		MEMBERSHIP FEES/CHARGES	ACTIVITIES/SERVICES
		Subscription revenue \$3.7m (~\$18,600 each) Banded by company sales	<ul style="list-style-type: none"> - Advocacy covering core policy streams: Competitiveness and Growth, Nutrition and Regulation and Sustainability - Submissions - Health, Nutrition & Scientific Affairs - Sustainable Practices support - Industry Affairs - Corporate Affairs - Economics and Trade - Working Groups, Advisory, Committees for key services

The large political organisation has 140 large firms as members, 1 is based in WA

3M Australia

A.Clouet (Australia)

ABC Sales and Marketing

Arnott's Group

Asaleo Care

Aspen Pharmacare Australia Pty Ltd

Australian Blending Company Pty Ltd

Barilla Australia

Bayer Australia Ltd

Beak and Johnston Pty Ltd

Beechworth Honey

Beerenberg Pty Ltd

Bega Cheese

Birch and Waite Foods Pty Ltd

Blackmores

Brands & Marks Pty Ltd

Bronte Industries

Bulla Dairy Foods

Bundaberg Brewed Drinks Pty Ltd

Bundaberg Sugar Ltd

Calbee Australia

Cantarella Bros Pty Ltd

Cantire Foods

Carman's Fine Foods

Chobani Pty Ltd

Church & Dwight (Australia) Pty Ltd

Clorox Australia Pty Ltd

Co Yo Pty Ltd

Coca-Cola Amatil

Coca-Cola South Pacific

Conga Foods Pty Ltd

Coopers Brewery Ltd

Dilmah Australia

Dr Oetker

Emma & Tom Foods Pty Ltd

Erskine Products

F. Mayer Imports

Ferrero Australia Pty Ltd

Fonterra Australia Pty Ltd

Forbidden Foods

Freedom Foods Group

Fresh Local Pty Ltd

Frucor Suntory (Australia) Pty Ltd

GlaxoGalderma Australia Pty Ltd

General Mills Australia Pty Ltd

George Weston Foods Ltd

SmithKline Consumer Healthcare

Go Natural

Goodman Fielder Ltd

Hakubaku Australia Pty Ltd

Han Yang Import & Export Pty Ltd

Haribo Australia

Henkel Au

Hive & Wellness Australia Pty Ltd

Hoyle Food Manufacturing Industries

Huon Acquaculture

ITO EN Australia Pty Ltd

Jacobs Douwe Egberts

Jalna Dairy Foods Pty Ltd

Johnson & Johnson Pacific Pty Ltd

K9 Natural Food Australia Pty Ltd

Kellogg (Aust) Pty Ltd

Kerry Ingredients Australia Pty Ltd

Keytone Dairy Corporation

Kimberly-Clark Australia Pty Ltd

Kinrise Pty Ltd

Kraft Heinz

Lactalis Australia

Laucke Flour Mills Pty Ltd

Level Beverages Pty Ltd

Life Health Foods AU

Lindt & Sprungli Australia

Lion

L'oreal Australia and New Zealand

Loving Earth Pty Ltd

Madura Tea Estates

Maggie Beer Holdings

Manildra Group

Mars Wrigley Confectionery

Mars Food

Mars Petcare

McCormick Foods Australia

McKenzie's Foods

Meade Farm Pty Ltd

Mentholatum Australasia Pty Ltd

Mondelez International

Mrs Mac's Pty Ltd

Murray River Organics Ltd

Nando's Peri-Peri Australia Pty Ltd

Nerada Tea Pty Ltd

Nestle Australia Ltd

Now Foods Pty Ltd

Nutricia Specialised Nutrition

Obela Fresh Dips & Spreads Pty Ltd

Ocean Spray International, Inc

One Harvest Group

Only Organic 2003 Pty Ltd

Patties Foods Ltd

Peerless Foods

Pepsico Australia New Zealand

Peters Ice Cream

Primo Meats Pty Ltd

Reckitt Benckiser (Australia) Pty Ltd

Red Bull Australia Pty Ltd

Rivalea (Australia) Pty Ltd

Sabrand Group

Sandhurst Fine Foods Australia

San Diego Tortilla Factory Pty Ltd

Sanitarium Health and Wellbeing Company

Saputo Dairy Australia

SC Johnson & Son Pty Ltd

SI&D Group Holdings

Simplot Australia Pty Ltd

Solaris Paper Pty Ltd

SPC Operations Pty Ltd

Specialty Coffee Pty Ltd

Spicemasters Australia Pty Ltd

STADA Pharmaceuticals Australia Pty Ltd

Stahmann Farms

Steric Pty Ltd

Stuart Alexander & Co Pty Ltd

Sugar Australia Pty Ltd

Sunny Queen Pty Ltd (Meal Solutions)

SunRice

Swisse Wellness Pty Ltd

Tasmanian Flour Mills

The A2 Milk Co

The Infant Food Co Pty Ltd

The Vege Chip Company

The Pialligo Estate

Tixana Pty Ltd

Tom & Luke Australia Pty Ltd

Unicharm Australasia

Unilever Australia & New Zealand

Upfield Australia (Sales) Pty Ltd

V2food Operations Pty Ltd

Vitality Brands Worldwide

Wattle Health Australia Ltd

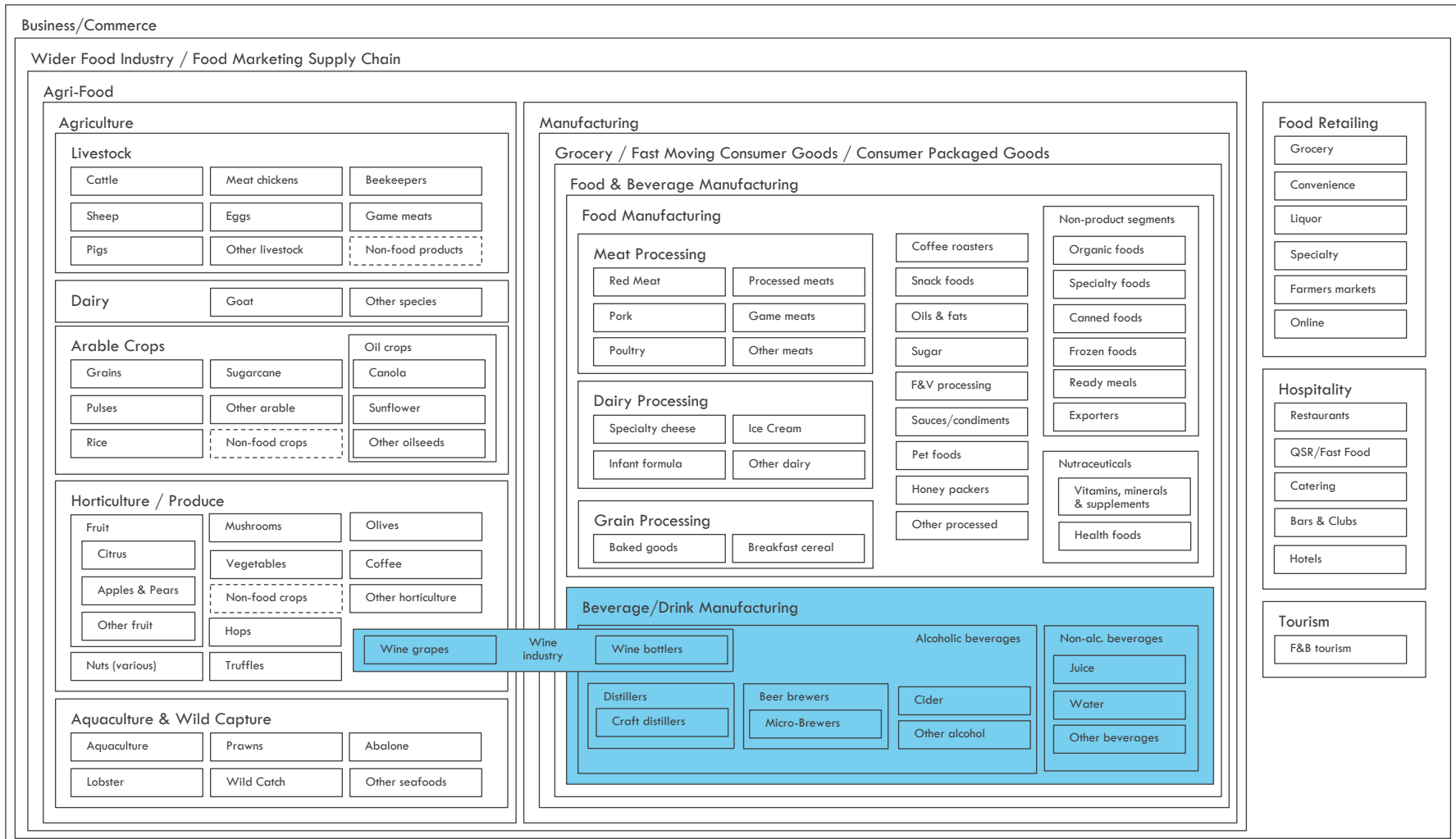
Whole Earth Brands

Yakult Australia Pty Ltd

Based

Activities/Distribution

BEVERAGES



A large number of organisations have some level of responsibility for beverages at the national level in Western Australia

BEVERAGES

NATIONAL LEVEL

A large number of organisations have some level of responsibility for beverages at the state level in Western Australia

BEVERAGES

STATE/REGIONAL LEVEL

 <p>WINES OF WESTERN AUSTRALIA <i>Extraordinary Regions</i></p>	 <p>MARGARET RIVER WINE</p>	 <p>GEOGRAPHE WINE REGION</p>	 <p>Southern Forests WINE REGION'S MANAGED & REGULATED</p>	 <p>GREAT SOUTHERN WINE</p>	 <p>BLACKWOOD VALLEY wine region</p>
 <p>SWAN VALLEY WINE REGION</p>	 <p>HART'S GRAPED VINES THE PERL REGION</p>	 <p>PERTH HILLS WINE REGION</p>	 <p>WEST AUSTRALIAN BREWERS ASSOC WABA</p>	<p>SOUTH WEST BREWERS ALLIANCE</p>	 <p>WA DISTILLERS GUILD</p>

Western Australia generally has good industry representation in beverages at the state level; only non-alcoholic beverages has a state-level gap

	ON-FARM	POST-FARMGATE
NATIONAL	<p>Wine Australia</p> <p>OTHER INGREDIENTS COVERED ELSEWHERE</p>	
STATE	 <p>Wines of Western Australia <i>Extraordinary Region</i></p> <p>OTHER INGREDIENTS COVERED ELSEWHERE</p>	 <p>Wines of Western Australia <i>Extraordinary Region</i></p> <p>WA DISTILLERS GUILD</p> <p>GAP WA NON-ALCOHOLIC BEVERAGE MANUFACTURERS</p>

BEVERAGES

NATIONAL

			 <p>The Australian Wine Research Institute</p>
<p>WINE AUSTRALIA</p>	<p>AUSTRALIAN GRAPE AND WINE INCORPORATED[^]</p>	<p>AUSTRALIAN SOCIETY OF VITICULTURE AND OENOLOGY</p>	<p>THE AUSTRALIAN WINE RESEARCH INDUSTRY</p>
<p>National</p>	<p>National</p>	<p>National</p>	<p>National</p>
<p>Peak Industry* (RRDC)</p>	<p>Peak Industry</p>	<p>Wine Professional</p>	<p>Wine Research</p>
<p>https://www.wineaustralia.com</p>	<p>https://www.agw.org.au</p>	<p>https://www.asvo.com.au</p>	<p>https://www.awri.com.au</p>
			
<p>WINE INDUSTRY SUPPLIERS ASSOCIATION</p>	<p>WINE INNOVATION CLUSTER</p>	<p>NATIONAL WINE AND GRAPE INDUSTRY CENTRE</p>	<p>CIDER AUSTRALIA ASSOCIATION</p>
<p>National</p>	<p>National</p>	<p>National</p>	<p>National</p>
<p>Wine Suppliers</p>	<p>Wine Research Collaborations</p>	<p>Wine Research and Science</p>	<p>Peak Cider and Perry</p>
<p>https://www.wisa.org.au</p>	<p>https://www.thewaite.org/waite-partners/wine-innovation-cluster/</p>	<p>https://www.csu.edu.au/nwgic</p>	<p>https://www.cideraustralia.org.au</p>

* Legislated Industry Body; ^Merger of Winemakers' Federation of Australia & Australian Vignerons in 2018

BEVERAGES

NATIONAL

			
ALCOHOL BEVERAGES AUSTRALIA	THE DRINKS ASSOCIATION	AUSTRALIAN BEVERAGES COUNCIL LTD (ABCL)	AUSTRALIAN GUILD OF ARTISAN DISTILLERS
National	National	National	National
Peak - Alcohol (across SC)	Beverages (all)	Peak - Non-Alcoholic	Craft distillers
https://www.alcoholbeveragesaustralia.org.au	https://www.drinksassociation.com.au/	https://www.australianbeverages.org https://www.australianbeverages.org/juice-australia-microsite/ https://www.australianbeverages.org/water-microsite/	http://www.distillersguild.com.au/ https://www.facebook.com/distillersguild/
			
BREWERS ASSOCIATION OF AUSTRALIA	INDEPENDENT BREWERS ASSOCIATION	AUSTRALIAN DISTILLERS ASSOCIATION	SPIRITS AND COCKTAILS AUSTRALIA
National Peak (large)	National (independents)	National - Commercial	National
Promotion safe drinking	Peak body	Lobby, Compliance	Advocacy
https://www.brewers.org.au	https://iba.org.au	https://australiandistillers.org.au	https://spiritsandcocktailsaustralia.com.au

BEVERAGES

NATIONAL


AUSTRALASIAN BOTTLED WATER INSTITUTE
National
Peak – Bottled water
https://www.bsigroup.com

BEVERAGES

STATE/REGIONAL

 <p>WINES OF WESTERN AUSTRALIA <i>Extraordinary Regions</i></p>			<p>SOUTH WEST BREWERS ALLIANCE</p>
<p>WINES OF WESTERN AUSTRALIA</p>	<p>WEST AUSTRALIAN BREWERS ASSOCIATION</p>	<p>WA DISTILLERS GUILD</p>	<p>SOUTH WEST CRAFT BEER CLUSTER</p>
<p>State</p>	<p>State</p>	<p>State</p>	<p>Regional</p>
<p>Peak - Wine</p>	<p>Peak - Beer</p>	<p>Peak - Spirits</p>	<p>Promotion, Collaboration</p>
<p>https://winewa.asn.au</p>	<p>https://www.wabeer.com.au</p>		<p>https://craftypint.com/news/2858/an-alliance-forms-in-the-south-west</p>

BEVERAGES

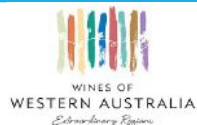
STATE/REGIONAL

			
<p>SWAN VALLEY REGIONAL WINEMAKERS ASSOCIATION</p>	<p>PERTH HILLS WINE REGION</p>	<p>PEEL WINE ASSOCIATION</p>	<p>GEOGRAPHE</p>
<p>Regional</p>	<p>Regional</p>	<p>Regional</p>	<p>Regional</p>
<p>Wine, Awards, Promo</p>	<p>Wine, Awards, Promo</p>	<p>Wine, Awards, Promo</p>	<p>Wine, Awards, Promo</p>
<p>https://swanvalleywine.com</p>	<p>https://www.perthhillswineregion.com.au/</p>	<p>https://peelwineassociation.com.au</p>	<p>https://www.geographewine.com.au</p>
			
<p>SOUTHERN FORESTS WINE REGIONS</p>	<p>MARGARET RIVER WINE ASSOCIATION</p>	<p>BLACKWOOD VALLEY WINE INDUSTRY ASSOCIATION</p>	<p>GREAT SOUTHERN WINE PRODUCER'S ASSOCIATION</p>
<p>Regional</p>	<p>Regional</p>	<p>Regional</p>	<p>Regional</p>
<p>Wine, Awards, Promo</p>	<p>Wine, Awards, Promo</p>	<p>Wine, Awards, Promo</p>	<p>Wine, Awards, Promo</p>
<p>https://www.southernforestswine.com</p>	<p>https://margaretriver.wine</p>	<p>https://blackwoodvalleywine.com.au</p>	<p>https://greatsouthernwine.org.au</p>

NOTE: Central WA is also a region (6 wineries), no website

WINE – WA WINE PRE/POST FARMGATE

Wines of WA is the peak WA wine organisation



DETAILS	
NAME	Wines Of Western Australia
ADDRESS	1/161 Great Eastern Hwy, Belmont WA 6104
PHONE	+61 8 9284 3355
EMAIL	ceo@winewa.asn.au
WEBSITE	https://winewa.asn.au https://www.winexportal.info
# OF STAFF	2 + Independent Chair
# OF BOARD	10 (regional representatives)
# OF MEMBERS	Represents 90% wine production in State
FOUNDED	1914/1987*
COVERAGE	Wine growers, producers, distributors

RESOURCES/PUBLICATIONS
<ul style="list-style-type: none"> - Newsletter - Networking events - The Wine Education Centre (for consumers and trade) - Reports – Wine production, exports, Short Courses - World Export Program (sector collaboration) - Membership includes membership to CCI - Access to Post parcel rates
FUNDING MODEL/INCOME STREAMS
<ul style="list-style-type: none"> - APC Producer Grant Funding \$235k - Membership Fees \$9k - Cash Flow Boost \$16k - Wine Education Centre \$8k - Grant Income \$875k
MEMBERSHIP FEES/CHARGES
<p>Total \$9,000 (2021) Fee for Service (fee based on wine volumes via APC)</p>

PROFILE
Wines of Western Australia provides support to producers and Regional Associations in the development of their regions.
MISSION/VISION
“a Western Australian wine industry that grows sustainably and profitably, built on the reputation of its great fine wine regions” The pathway to this vision is a unified and strategic influential industry focused on regional fine wines of provenance and authenticity. Producers and Regional Associations are the custodians of their Regional brand.
ACTIVITIES/SERVICES
<ul style="list-style-type: none"> - Advocacy (Biosecurity, licensing, legislation across supply chain) – At the National and State level - Representation – strong relationships with government agencies, enhancing reputation of WA wine - Administration – Management of projects, support Regional Associations provide services - Communication - ensuring all parties receive accurate and timely information

*1987 Amalgamation of WA Grapegrower's and Winemakers Association

BEER – WA BEER MANUFACTURING

WABA represents the interests of the Beer manufacturers in the State



DETAILS		RESOURCES/PUBLICATIONS	PROFILE
NAME	West Australian Brewers Association (WABA)	- Drink West Drink Best Campaign	An independent body developed to be a unifying and supporting voice for the craft brewing industry of Western Australia.
ADDRESS	N/A	FUNDING MODEL/INCOME STREAMS	MISSION
PHONE	N/A	- Membership - Sponsorship	- Enhance the status and general awareness of microbreweries in WA - Promote brewing and beer education - Help represent the interest of Members within the general community - Work with the Government to assist breweries on issues such as taxation reduction and small business development.
EMAIL	waba@wabeer.com.au	MEMBERSHIP FEES/CHARGES	ACTIVITIES/SERVICES
WEBSITE	https://www.wabeer.com.au	Brewery in Planning \$150 Brewery Membership by size \$600-\$7,500 Cideries \$400 Trade Membership \$400 Individual Membership \$50	- WA Beer Week - Events
# OF STAFF	1		
# OF BOARD	4		
# OF MEMBERS	50		
FOUNDED	2001		
COVERAGE	Craft beer, cideries manufacturers		

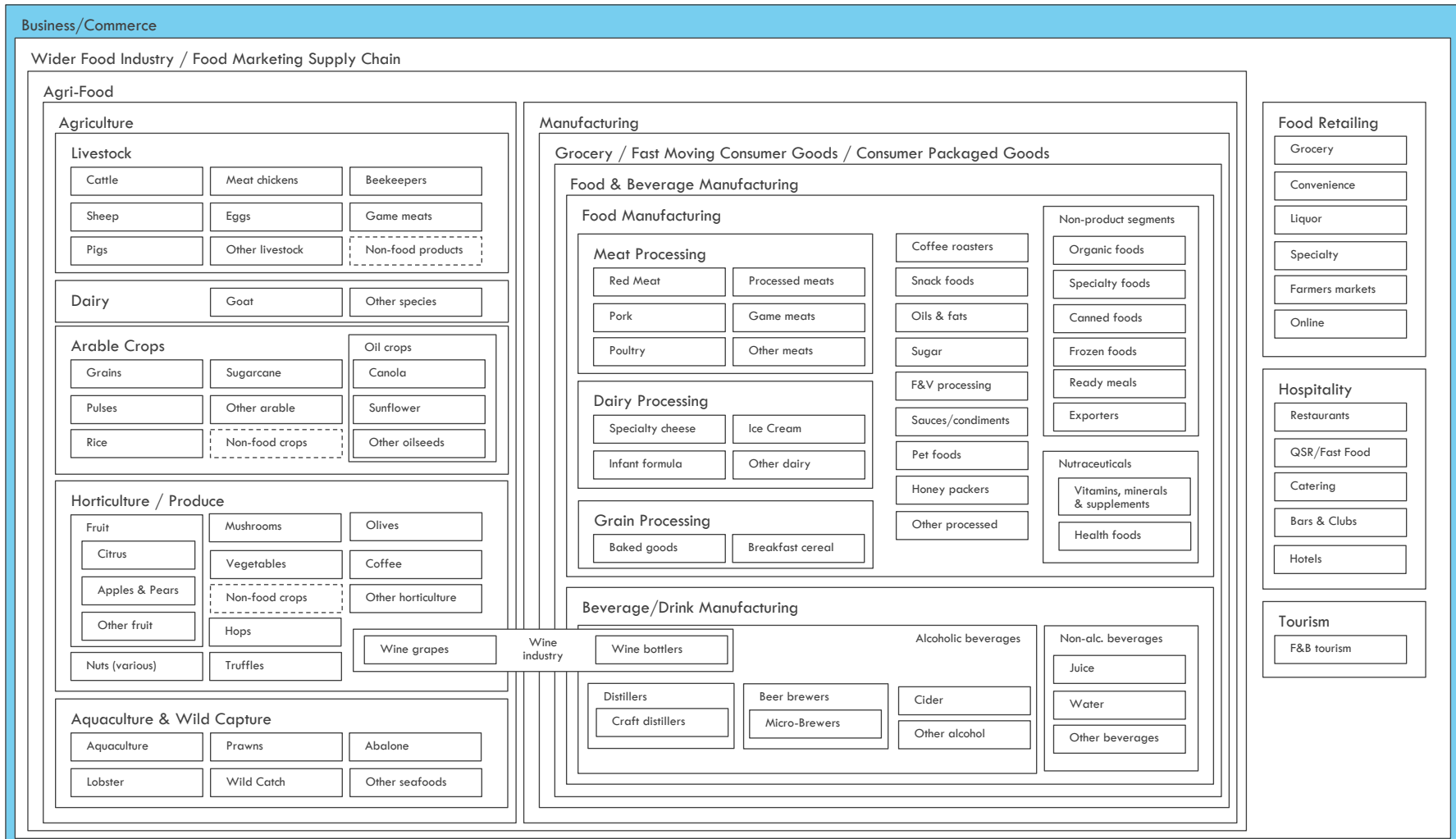
DISTILLING – WA SPIRITS MANUFACTURING

WA Distillers Guild represent the distillers in the State



DETAILS		RESOURCES/PUBLICATIONS	PROFILE
NAME	WA DISTILLERS GUILD (WADG)	<ul style="list-style-type: none"> - Run Galas - Awards 	An Association to represent distillers and Western Australia
ADDRESS	N/A		MISSION
PHONE	N/A	FUNDING MODEL/INCOME STREAMS <ul style="list-style-type: none"> - Membership fees - Events 	Formed to support WA distillers and promote the awareness, purchase and consumption of spirits that have been distilled in Western Australia.
EMAIL	information@wadg.org.au		ACTIVITIES/SERVICES
WEBSITE	https://www.facebook.com/wadistillerguild/	MEMBERSHIP FEES/CHARGES <p>Full membership \$150 Associate membership \$250</p>	<ul style="list-style-type: none"> - Support WA distillers - Hold events to promote the awareness, purchase and consumption of spirits that have been distilled in Western Australia - Lobby on behalf of the industry - Involved with: Royal Perth Show Awards and Presentation Event and Fremantle Markets presents WADG - Associated with the Australian Distillers Association
# OF STAFF	1		
# OF BOARD	TBD		
# OF MEMBERS	26		
FOUNDED	N/A		
COVERAGE	Distillers across WA		

BUSINESS



BUSINESS

SECTOR OVERVIEW

PRIVATE

QUASI/GOVERNMENT

NATIONAL



STATE



REGIONAL

LOCAL



x42

BUSINESS – CROSS CUTTING

NATIONAL ASSOCIATIONS

		
<p>AUSTRALIAN CHAMBER OF COMMERCE AND INDUSTRY (ACCI)</p>	<p>GOVERNANCE INSTITUTE OF AUSTRALIA</p>	<p>EXPORT COUNCIL OF AUSTRALIA</p>
<p>National</p>	<p>National</p>	<p>National</p>
<p>Peak business network*</p>	<p>Peak - Professional</p>	<p>Export, Trade, Info, Training</p>
<p>https://www.australianchamber.com.au</p>	<p>https://www.governanceinstitute.com.au/</p>	<p>https://export.org.au</p>

* Established the Australian Made Campaign

BUSINESS – CROSS CUTTING

GOVT NATIONAL AGENCIES

			
<p>BUSINESS AUSINDUSTRY</p>	<p>AUSTRALIAN TRADE AND INVESTMENT COMMISSION</p>	<p>IP AUSTRALIA</p>	<p>DEPARTMENT OF FOREIGN AFFAIRS AND TRADE</p>
<p>National, Government</p>	<p>National, Government</p>	<p>National, Government</p>	<p>National</p>
<p>Help Business access government*</p>	<p>Export, Advice, Support</p>	<p>Search, Advice</p>	<p>Trade Portal</p>
<p>https://www.industry.gov.au/policies-and-initiatives/ausindustry-services-for-australian-businesses-and-industry</p>	<p>https://www.austrade.gov.au https://www.austrade.gov.au/fresh-fruit-veg/</p>	<p>https://www.ipaustralia.gov.au</p>	<p>https://ftaportal.dfat.gov.au</p>

* advise on busines goals, what support available Federal and State, introductions

BUSINESS – CROSS CUTTING

STATE AGENCIES

 <p>Department of Primary Industries and Regional Development</p> <p>GOVERNMENT OF WESTERN AUSTRALIA</p>	 <p>Small Business Development Corporation</p> <p>GOVERNMENT OF WESTERN AUSTRALIA</p>	 <p>Government of Western Australia Department of Jobs, Tourism, Science and Innovation</p>	<p>Invest & Trade WESTERN AUSTRALIA</p>  <p>Government of Western Australia Department of Jobs, Tourism, Science and Innovation</p>
DEPARTMENT OF PRIMARY INDUSTRIES AND REGIONAL DEVELOPMENT	WA SMALL BUSINESS DEVELOPMENT CORPORATION (SBDC)	DEPARTMENT OF JOBS, TOURISM, SCIENCE AND INNOVATION	INVEST & TRADE WA
State	State	State	State [^]
Advice, Funding, Support, Services	Business advice, tools	Advice, Funding, Support,	Assistance
https://www.agric.wa.gov.au/agribusiness-food-trade/export-services	https://www.smallbusiness.wa.gov.au/	https://www.wa.gov.au/organisation/department-of-jobs-tourism-science-and-innovation	https://www.investandtrade.wa.gov.au/our-industries/primary-industries
			
REGIONAL CHAMBERS OF COMMERCE AND INDUSTRY WA (x42*)	COMPASS AGRICULTURAL ALLIANCE (CAA WA)		
Regional/Local	State		
Business advice, resources	Collaboration – Farm Management, info		
https://regionalchamberswa.com.au	https://www.compassag.com.au/		

*42 Regional Chambers with 7,651 members; ^ Investment Attraction Fund \$100m (including primary industries) supporting Diversify WA

CHAMBER OF COMMERCE AND INDUSTRY OF WA LTD (CCIWA)

CCIWA represent the interests of all businesses in the State

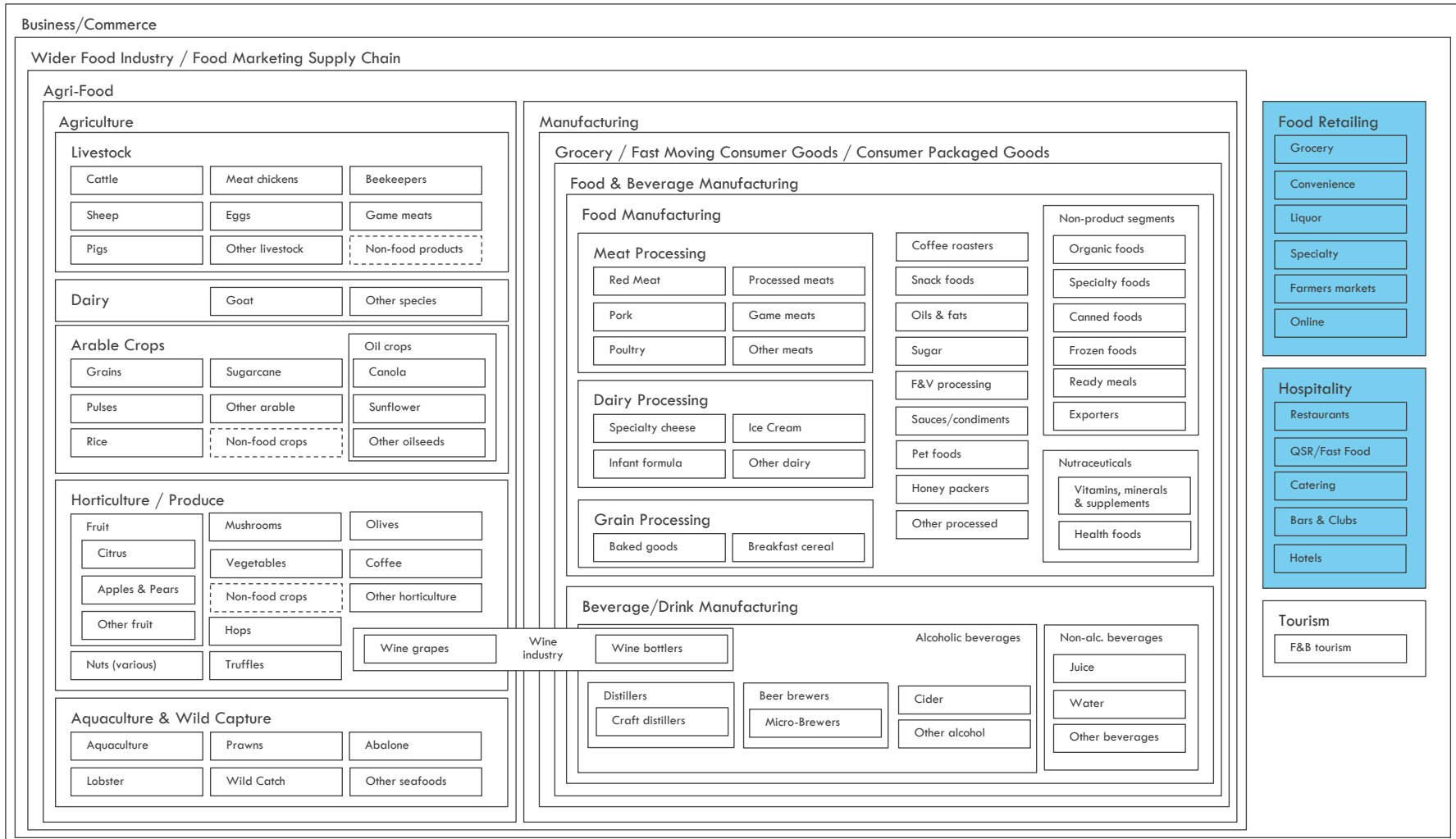


DETAILS	
NAME	Chamber of Commerce and Industry WA (CCIWA)
ADDRESS	Level 5 Bishops See 235 St Georges Terrace, Perth WA 6000
PHONE	1300 422 492 / +61 8 9365 7555
EMAIL	info@cciwa.com
WEBSITE	https://cciwa.com
# OF STAFF	6 leadership; 156
# OF BOARD	6
# OF MEMBERS	Largest Association WA
FOUNDED	1890
COVERAGE	All businesses across WA 42 Regional Chambers (7,651 members)

RESOURCES/PUBLICATIONS
<ul style="list-style-type: none"> - Newsletters - Quarterly economic forecast - Training and Events
FUNDING MODEL/INCOME STREAMS
<ul style="list-style-type: none"> - Subscriptions \$3.8m - Services \$10.3m - Service Contract \$0.49 - Customer contracts \$0.03 - Other \$8.3m (asset sales etc.)
MEMBERSHIP FEES/CHARGES
<p>Sole trader 1 FTE \$56.10/mth = \$673 Essential 1-29 FTE \$89.65/mth = \$1,076 Complete 30-99 FTE \$167.75/mth = \$2,013 Advantage 100-199 – partic in working grps Corporate >200 FTE – Excl economic briefings</p>

PROFILE
CCIWA is the peak organisation advancing trade and commerce in Western Australia and is driven by our fundamental belief in free enterprise. It is a incorporated member organisation.
MISSION
Our vision is for WA to be the best place to live and do business.
ACTIVITIES/SERVICES
<ul style="list-style-type: none"> - Advisory Services – Employment Law, International Trade, Workplace Health and Safety, Construction services, Education Services - Trade documentation - Advocacy – Develop public policy options - Industry Capability Network WA - Grant Finder - Business Toolbox - Apprenticeship and trainee training - Education Development Fund - Relationships with Australian Trade Commission, Regional Chambers, bilateral Chambers, indigenous bodies - Events - Member Hub

RETAILING & HOSPITALITY



RETAIL AND HOSPITALITY – CROSS CUTTING

NATIONAL AGENCIES

<p>NATIONAL ASSOCIATION OF RETAIL GROCERS OF AUSTRALIA (NARGA)</p>			
<p>NATIONAL ASSOCIATION OF RETAIL GROCERS OF AUSTRALIA (NARGA)</p>	<p>AUSTRALASIAN ASSOCIATION OF CONVENIENCE STORES</p>	<p>THE AUSTRALIAN RETAILERS ASSOCIATION</p>	<p>FOODSERVICE SUPPLIERS ASSOCIATION OF AUSTRALIA*</p>
<p>National</p>	<p>National</p>	<p>National</p>	<p>National</p>
<p>Grocery</p>	<p>Peak</p>	<p>Peak</p>	<p>Info sharing, Events</p>
<p>http://fnq.cc/narga.html (??)</p>	<p>https://www.aacs.org.au</p>	<p>https://www.retail.org.au/</p>	<p>http://fsaa.org.au</p>
			
<p>THE NATIONAL RETAIL ASSOCIATION</p>	<p>RETAIL DRINKS AUSTRALIA</p>	<p>AUSTRALIAN FARMER'S MARKETS ASSOCIATION</p>	<p>MASTER GROCERS ASSOCIATION (MGA)</p>
<p>National</p>	<p>National</p>	<p>National</p>	<p>National</p>
<p>Lobby, Advocacy</p>	<p>Advocacy, Support</p>	<p>Information, Directory</p>	<p>Retail – Advoc, Training, Educ</p>
<p>https://www.nra.net.au/</p>	<p>https://www.retaildrinks.org.au</p>	<p>https://farmersmarkets.org.au</p>	<p>https://www.mga.asn.au/</p>

*Members: Mrs Macs, Lactalis, Inghams

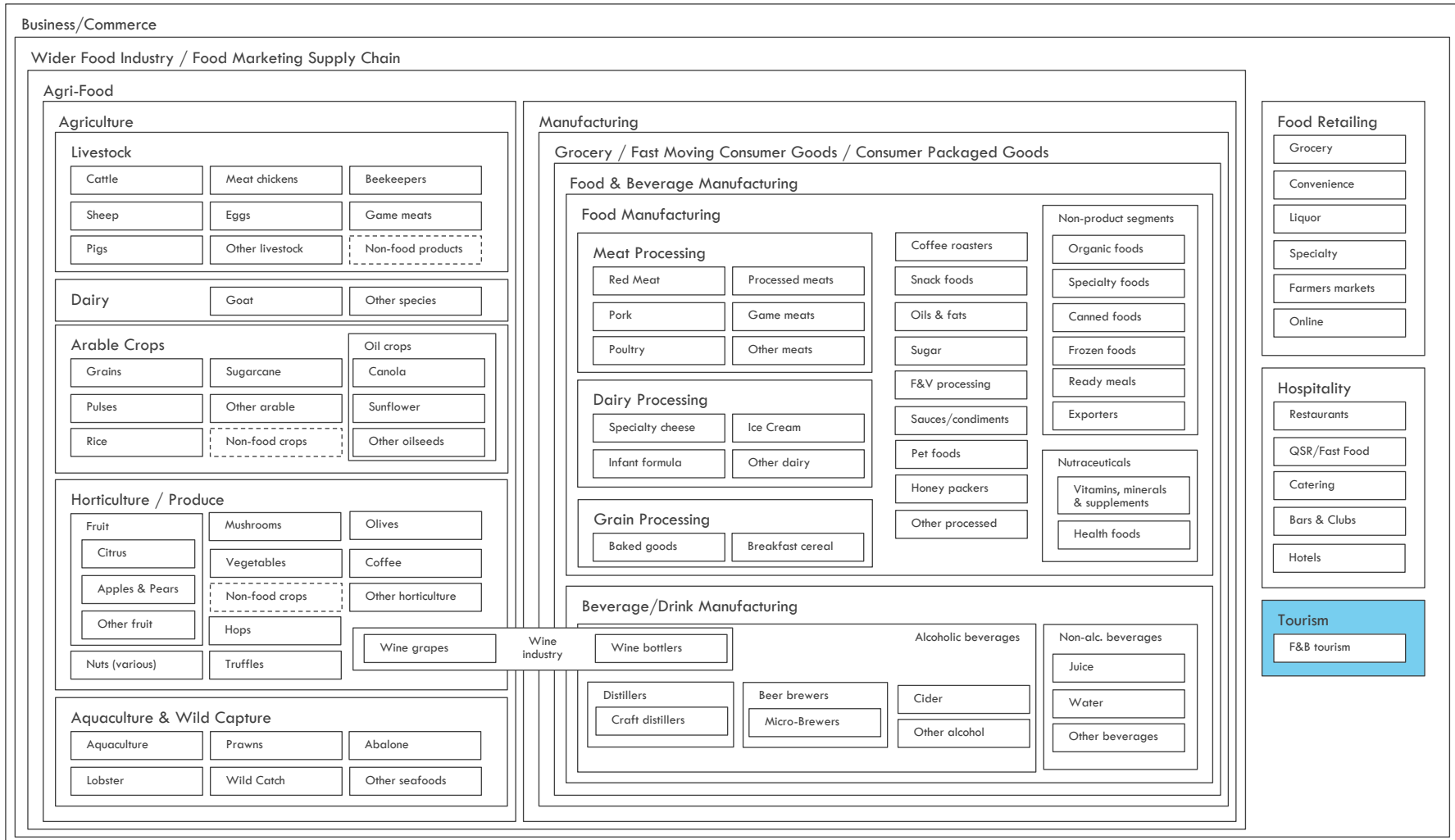
RETAIL AND HOSPITALITY – CROSS CUTTING...

NATIONAL/STATE AGENCIES

			
<p>AUSTRALIAN HOTELS ASSOCIATION</p>	<p>RESTAURANT AND CATERING ASSOCIATION</p>	<p>AUSTRALIAN HOTELS ASSOCIATION -WA</p>	<p>THE LIQUOR STORES ASSOCIATION OF WESTERN AUSTRALIA INC.</p>
<p>National/State Branch</p>	<p>National/State Branch*</p>	<p>State</p>	<p>State</p>
<p>Hotels</p>	<p>Advocacy, Policy, HR, Awards, Training</p>	<p>Hotels</p>	<p>Lobby, Compliance</p>
<p>http://aha.org.au/</p>	<p>https://www.rca.asn.au</p>	<p>https://www.ahawa.asn.au/</p>	<p>http://www.lsawa.asn.au/</p>

* State level membership \$455-\$865 membership fees

TOURISM



TOURISM

Tourism activities support the wider F&B sector

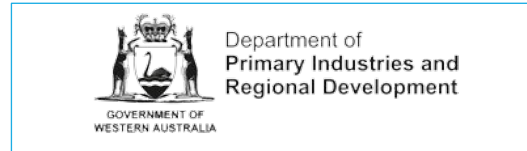
AGENCIES

			
<p>AUSTRALIAN REGIONAL TOURISM (ART)</p>	<p>TOURISM AUSTRALIA</p>	<p>TOURISM WA</p>	<p>AUSTRALIA'S SOUTH WEST</p>
<p>National</p>	<p>National, Government</p>	<p>State, Government</p>	<p>Regional</p>
<p>Peak – regional practitioners</p>	<p>Peak Promotions, Events</p>	<p>Industry Support*</p>	<p>Tourism – Marketing and Management</p>
<p>https://regionaltourism.com.au/</p>	<p>https://www.tourism.australia.com/en</p>	<p>https://www.tourism.wa.gov.au</p>	<p>https://corporate.australiassouthwest.com</p>
			
<p>AUSTRALIA'S NORTH WEST</p>	<p>AUSTRALIA'S GOLDEN OUTBACK</p>	<p>AUSTRALIA'S CORAL COAST</p>	<p>DESTINATION PERTH</p>
<p>Regional</p>	<p>Regional</p>	<p>Regional</p>	<p>Regional</p>
<p>Tourism – Marketing and Management</p>	<p>Tourism – Marketing and Management</p>	<p>Tourism – Marketing and Management</p>	<p>Tourism – Marketing and Management</p>
<p>https://www.australiasnorthwest.com</p>	<p>https://www.australiasgoldenoutback.com</p>	<p>https://www.australiascoralcoast.com/</p>	<p>https://www.destinationperth.com.au</p>

* Divided into 5 Regional Tourist Organisations (RTO's)

Beyond industry level organisations, there are over 100 organisations supporting firms at the Federal, State and local level

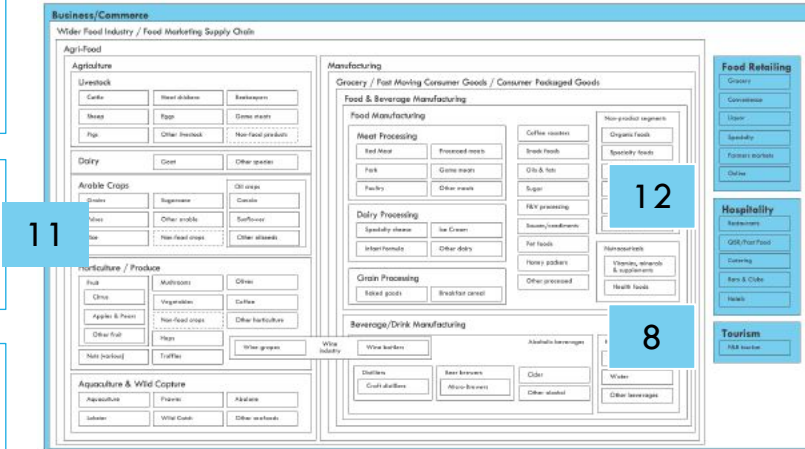
F&B SUPPORTING ORGANISATIONS



8 **Cooperative Research Australia**
 Australian Government
 Department of Industry, Science, Energy and Resources
 Industry Growth Centres

11

11 **apc**
 AGRICULTURAL PRODUCE COMMISSION
 Supporting Producers' Initiative



9 **REGIONAL DEVELOPMENT COMMISSIONS**

9

7 **SCIENCE AND RESEARCH ORGANISATIONS***

12 **EDUCATION AND TRAINING FACILITIES**

19 **OTHER AGENCIES / ORGANISATION**

* Excluding Universities

DPIRD undertakes a range of activities with similar roles to a F&B industry body



Department of
Primary Industries and
Regional Development

GOVERNMENT OF
WESTERN AUSTRALIA

PROGRAMS AND RESOURCES	TYPE	WEBSITE	NOTES
Buy West Eat Best	Marketing and positioning Consumer and industry facing directory	https://www.buywesteatbest.org.au	Directory, Trademark Meet the buyer events, Knowledge sharing Newsletters, Joint in-store promotion Retail activation, Collaborative marketing
Regional Capability Guides	Information sharing Consumer and industry facing directory Guides and Publications	https://www.agric.wa.gov.au/capability-guides	Online, interactive, pdf DPIRD - Agribusiness, Food and Trade Royalties for Regions Program Collaboration with RDC's & Chambers of Commerce
Export Directory	Information sharing Industry facing directory	https://www.wa.gov.au/organisation/department-of-primary-industries-and-regional-development/western-australian-exporter-directory	Company profiles in pdf format
WA F&B Professional Service Providers Directory	Directory, connecting	https://www.agric.wa.gov.au/food-beverages/search-food-and-beverage-professional-service-provider-directory	List compiled from relevant experience in the F&B industry
Export Support	Information sharing, assistance, funds	https://www.agric.wa.gov.au/agribusiness-food-trade/export-services	Export Grants Study tours and Visiting specialists
WA Food and Beverage Network	Information sharing, network, collaborate, Industry facing	https://www.facebook.com/groups/WAFoodBeverageNetwork	Facebook group 509 members DPIRD - Food Industry Innovation
Studies and Reports	Studies to identify key trends impacting WA industry Studies to support new Industry	various, on-going	
Funds and Grants Management	Access to funds, incentives and stimulus initiatives Newsletters	various, on-going	Voucher Programs – Round 3 (current) Value Add Investment, Grants, Export Grants, International Competitiveness Grants
Events and Workshops	Education, Information sharing, Presentations Industry networking events Training and skills development	various, on-going	Investor Readiness Business Opportunity, Export Readiness

DPIRD – BWEB buy local program supports both producers and F&B manufacturers, foodservice and hospitality and retailers



Department of
Primary Industries and
Regional Development

GOVERNMENT OF
WESTERN AUSTRALIA

DETAILS

NAME	BUY WEST EAT BEST (BWEB)
ADDRESS	1 Nash Street, Perth WA 6000 Australia
PHONE	1800 132 422
EMAIL	feedback@buywesteatbest.wa.gov.au
WEBSITE	https://www.buywesteatbest.org.au
# OF STAFF	4 FTE
# OF BOARD	-
# OF MEMBERS	~220
FOUNDED	2008
COVERAGE	1) Producers 2) Manufacturers 3) Foodservice and Hospitality 4) Retailers 5) Associates

RESOURCES/PUBLICATIONS

- Trademark
- Promotional material
- Events
- Promote regional events

FUNDING MODEL/INCOME STREAMS

- Administered by DPIRD
- Membership fees
- Fee for some additional services
- Collaborative marketing

CHARGES

All member types \$309 + GST/yr
Collaborative marketing (variable)

PROFILE

Buy West Eat Best as a brand supports West Australian food and beverage industries. The distinctive bite mark logo of Buy West Eat Best enables Western Australian shoppers to clearly identify food and drink products which have been grown, farmed, fished, processed, prepared and served right here in WA.

MISSION

Membership for Buy West Eat Best affords easy communication of local positioning while being aligned with a brand that represents integrity, trust, and fresh, local produce. It also provides valuable opportunities to leverage the Buy West Eat Best calendar of advertising, public relations, social media, large network, and trade marketing events.

ACTIVITIES/SERVICES[^]

- Licence to use the Buy West Eat Best logo for application on packaging, product and promotional material
- Access to point of sale materials such as stickers, shelf talkers, posters, recipe cards and mobiles
- Exclusive marketing opportunities and activations, including but not limited to*:
 - Retail promotions such as sampling opportunities and catalogue inclusions
 - Reduced rate for advertising features
 - Promotional support via Buy West Eat Best social media channels, with 25,000+ followers
 - Participation in Buy West Eat Best public relations events and campaigns
 - Industry networking, B2B, B2C opportunities

[^] Particular to producers; * May involve co-investment

COOPERATIVE RESEARCH CENTRES (CRC)* At the federal level there are six current CRC relevant to the F&B industry plus two Growth Centre

NATIONAL GOVT AGENCIES

			
<p>CRC FOR HONEY BEE PRODUCTS (2017-2022; \$7m)</p>	<p>FOOD AGILITY CRC (2017-2027; \$50m)</p>	<p>CRC FOR DEVELOPING NA (2017-2027; \$75m)</p>	<p>FIGHT FOOD WASTE CRC (2018-2028; \$30m)</p>
<p>National</p>	<p>National</p>	<p>Northern Australia</p>	<p>National</p>
<p>Science and Research</p>	<p>Research (Data-driven, robotics, AI)</p>	<p>Science and Research</p>	<p>Science and Research</p>
<p>https://www.crchoneybeeproducts.com</p>	<p>https://www.foodagility.com</p>	<p>https://www.crcna.com.au</p>	<p>https://fightfoodwastecrc.com.au</p>
			
<p>BLUE ECONOMY CRC (2019-2029; \$70m)</p>	<p>FUTURE FOOD SYSTEMS CRC (2019-2029; \$35m)</p>	<p>ADVANCED MANUFACTURING GROWTH CENTRE</p>	<p>FIAL</p>
<p>National</p>	<p>National</p>	<p>National*</p>	<p>National</p>
<p>Science and Research</p>	<p>Science and Research</p>	<p>Manuf and Research - Advanced</p>	<p>Cooperation, Internat Opps, Export Directory</p>
<p>https://blueeconomycrc.com.au</p>	<p>https://www.futurefoodsystems.com.au</p>	<p>https://www.amgc.org.au/</p>	<p>https://www.fial.com.au</p>

FIAL supports export growth and provides funding to support agrifood growth via regional clusters

2018 RECIPIENTS



Central Coast Food Alliance



FermenTasmania



Food & Agribusiness Network



Food & Fibre Gippsland

2021 RECIPIENTS

**Tasmanian
Agrifood Network**

Tasmanian Agrifood Network

*Tropical North
Queensland Regional
Food Network*

Tropical North Queensland
Regional Food Network



Greater Whitsunday Alliance –
Agtech Cluster



Limestone Coast Food and
Agribusiness Cluster

RURAL RESEARCH AND DEVELOPMENT CORPORATIONS (RRDC)* enable co-investment in R&D and marketing in the primary industries

COMMONWEALTH*



INDUSTRY-OWNED






F&B FOCUS








F&B FOCUS






RRDC are industry service bodies co-funded from production levies and government, they manage R&D and Marketing programs

FUNDING





MODEL

- **Levy** of production arrangements to contribute to R&D and marketing needs (compulsory)
- **Matching** Commonwealth payments (dollar for dollar (capped))
- Levies are collected by the government from rural industries to support R&D, promotion and marketing, residue testing and plant and animal health programs.

- RRDC are **industry service bodies**, and with the exception of Australian Pork Limited, are not industry representative bodies.
- Rural RDC is a **partnership** between industry and government, responsive to public and private stakeholders, and with a core aim of increasing economic, environmental and social benefits for our rural industries, rural and regional communities, and the nation.
- Through the partnership the issues of **shared funding** contributions and prioritisation are resolved.
- With the exception of Sugar Research Australia, RRDC **do not own or manage research facilities** or undertake research and development activities themselves. Instead they **partner with** and leverage off the activities of other participants in Australia's rural innovation system.
- Other research funders include the Australian Government (through departments, programs and agencies such as the Australian Research Council), State and Territory governments, non-government organisations and private sector companies and individuals.
- Research providers include CSIRO, state and territory government departments, universities, and consultants.

Agrifutures supports smaller emerging industries and AIA supports joint investment projects across the RRDC

RRDC - NATIONAL

	
RURAL INDUSTRIES RESEARCH AND DEVELOPMENT CORPORATION (RIRDC)	AGRICULTURAL INNOVATION AUSTRALIA*
National	National
Invest in R&D for rural industries	R&D Investment
https://www.agrifutures.com.au	https://www.aginnovationaustralia.com.au

*Sits above the 15 RRDC's, facilitates investment and collaboration in cross-industry issues of national importance

The State based APC have a wide remit to assist the industry via fee for service funding – this can include activity relevant to F&B processors

COMMITTEES



APC POTENTIAL SERVICES

PRODUCE

Avocado
Carnarvon Banana
Pome, Citrus & Stonefruit
Strawberry
Table Grape
Vegetable
Potato

OTHER

Wine
Beekeepers
Egg
Pork

THEMATIC

Fruit Fly Baiting
Crop Pest Control

- Committees allows each sector to identify and focus on areas of particular interest or need, and to provide services aimed at improving the prosperity and development of their businesses.
- They develop a strategic plan and provide the following services
- (a) **advertise** and **promote** the agricultural produce;
- (b) control or develop the means of **controlling pests** and **diseases** if there is a likelihood of those pests or diseases affecting the quality or volume of output of the agricultural produce;
- (c) **conduct research** in relation to any matter, if in the opinion of the producers' committee that research is of advantage to producers of the agricultural produce;
- (d) conduct **educational or instructional programmes** that, in the opinion of the producers' committee, may be of advantage to producers of the agricultural produce;
- (e) develop and **expand markets** for the agricultural produce in Western Australia and elsewhere;
- (f) establish a voluntary **insurance scheme** for the benefit of producers of the agricultural produce including insurance relating to crops;
- (g) undertake and provide **market forecasting** for the agricultural produce;
- (h) establish systems of **inspection** for the agricultural produce for the purpose of **quality control** or pest and disease control;
- (i) formulate **schemes** for declaring producers of the agricultural produce to be **accredited producers**;
- (j) establish systems to facilitate **inspection** of grading, packaging and storage of the agricultural produce including weight and uniformity (including uniformity of ripeness) **within packages**;
- (k) support, with or without grant of financial aid, and whether or not initiated by the committee or the Commission, any scheme or activity which in the committee's opinion is capable of **assisting in the production, promotion or sale of the agricultural produce**;
- (l) provide such other services for the agricultural produce as may be prescribed;
- (la) establish a **compensation scheme** for the benefit of producers whose agricultural produce is destroyed as a result of a pest or disease of that produce or action taken to control a pest or disease of that produce;
- (m) arrange for the provision of all or any of the services or the exercise of any of the functions referred to in paragraphs (a) to (la) in whole or in part by another person or organization or in conjunction with the Commission or any other person or organization.

REGIONAL DEVELOPMENT COMMISSIONS (RDC) are responsible to the Minister for Regional Development and support regional economic development

COMMISSIONS



OBJECTIVES

The objectives of the Regional Development Commissions (RDCs) are to:

- maximise **job** creation and improve **career** opportunities in the region;
 - develop and broaden the **economic base** of the region;
 - identify **infrastructure** services needed to promote economic and social development within the region;
 - provide **information** and **advice** to promote business development within the region;
 - seek to ensure that the general **standard** of government **services** and access to those services in the region is comparable to that which applies in the metropolitan area; and
 - generally take steps to **encourage, promote, facilitate** and monitor the economic development in the region.
- Support regional grants programs
 - Host TradeStart Advisers (export assistance and networking, partnership with Austrade)

There are nine RDCs across WA, often with a focus on supporting economic development of the F&B sector

REGIONAL AGENCIES

				
<p>GASCOYNE DEVELOPMENT COMMISSION</p>	<p>MID WEST DEVELOPMENT COMMISSION</p>	<p>WHEATBELT DEVELOPMENT COMMISSION</p>	<p>PEEL DEVELOPMENT COMMISSION</p>	<p>SOUTH WEST DEVELOPMENT COMMISSION</p>
<p>https://www.gdc.wa.gov.au</p>	<p>https://www.mwdc.wa.gov.au</p>	<p>https://www.wheatbelt.wa.gov.au</p>	<p>https://www.peel.wa.gov.au</p>	<p>http://www.swdc.wa.gov.au</p>
<p>Gascoyne Food Bowl Gascoyne Food and Beverage Capability Guide</p>	<p>Aquaculture Development – nursery</p>	<p>Watersmart Farms Northern Growth Alliance</p>	<p>Transform Peel</p>	<p>-</p>
				
<p>GOLDFIELDS ESPERANCE DEVELOPMENT COMMISSION</p>	<p>GREAT SOUTHERN DEVELOPMENT COMMISSION</p>	<p>KIMBERLEY DEVELOPMENT COMMISSION</p>	<p>PILBARA DEVELOPMENT COMMISSION</p>	
<p>https://www.gecdc.wa.gov.au</p>	<p>https://www.gsdc.wa.gov.au</p>	<p>https://kdc.wa.gov.au</p>	<p>https://www.pdc.wa.gov.au</p>	
<p>-</p>	<p>Aquaculture Development</p>	<p>Ord East Kimberley Expansion Agri RED Grants Water for Food</p>	<p>Pilbara Hinterland Ag Devt Initiative Pilbara Beef Infrastructure Studies Pilbara Rock Oyster Research and Development Project</p>	

The RDC often collaborate with other regional chambers and government to support activity, as this investment attraction example show

COLLABORATIVE PARTNERS



Department of
Primary Industries and
Regional Development



THE NORTHERN
GROWTH ALLIANCE
OF WESTERN AUSTRALIA



FOOD AND BEVERAGE PRODUCERS BY CATEGORY

Beverages <ul style="list-style-type: none"> 14K Brewery Coonina Winery Dependency Wines Dr Jims Famous Lemon Squash Nesoi Satare Outback Brewing Co Strongyarm Winery Western Produce 	<ul style="list-style-type: none"> Merre Granola Mizzi's Gourmet Food Three Farmers 	Honey <ul style="list-style-type: none"> Beehappy Apiaries Little Eastern Farm West Coast Honey
Bread & Grain <ul style="list-style-type: none"> Black Beach Bakehouse Black Barley Australia Gingin Clean Food Green Valley Wheatbelt Farm Wheat Foods Jingynal Mill 	Bushfoods <ul style="list-style-type: none"> Merriwick Native Farms Mizzi's Gourmet Food Saralauca Sensawood Produce 	Horticulture Fresh and Dried <ul style="list-style-type: none"> Agri Fresh Gingin Pomegrinates and Dates Jullimar Date Garden Loose Leaf Lettuce Merriwick Native Farms Moores Citrus Taste of Falbot Western Produce Woolra Farm Asparagus
	Dairy <ul style="list-style-type: none"> Local Coast Artisan Cheese 	
	Eggs <ul style="list-style-type: none"> Barricks Farm Pastured Eggs Leisure Valley Farm 	

BLOODY GOOD BILTONG CO.

The Bloody Good Biltong Co. was established in York, WA in 2020. It is a passion project of a backyard parent for making handmade and air-dried beef biltong for family and friends.

Bloody Good Biltong Co. uses premium quality beef, only the best cuts and air-dried beef biltong from WA's best beef cuts, using locally sourced ingredients.

It's been enjoyed with friends and family over a beer, while watching the sunset over the mountains of the West Coast and the ocean waves crashing on the shore.

Product Range

- Beef biltong
- Beef biltong with chilli
- Beef biltong with lemon and lime
- Beef biltong with honey and lemon
- Beef biltong with honey and lemon

Sales Information

- Available for sale from 10am to 6pm
- Product is available for sale at the following locations:
- Merriwick Native Farms
- Woolra Farm
- Asparagus



TAKE OF THE WHEATBELT FOOD AND BEVERAGE CAPABILITY GUIDE 33

REGIONAL DEVELOPMENT AUSTRALIA (RDA) RDA are a National Network of committees funded by the Government and admin. by the DITRC*

AGENCIES



OBJECTIVES

The Regional Development Agencies (RDAs) are responsible for:

- providing independent **advice** to all three levels of **government** on critical issues affecting their regions
- collaborating with relevant stakeholders to **identify economic opportunities** and leverage private and public sector investment to their regions
- **connecting** regional businesses, councils and industry sectors with international trade partners, financial markets and potential investors
- working closely with community leaders to **identify funding sources** and **develop project proposals** to support economic growth
- providing assistance to local communities to develop **project proposals** to support economic growth
- promoting **awareness of government programs** in the RDA community
- Improve **Commonwealth** regional policy making

There are nine RDAs across WA

REGIONAL AGENCIES

			
PERTH	MID WEST GASCOYNE	WHEATBELT	PEEL
https://www.rdap Perth.org/	https://www.rdamwg.com.au	http://www.rdawheatbelt.com.au	https://www.rdapeel.org.au
-	Aquaculture Support	-	Business Park (Food & Bev)

				
SOUTH WEST	GOLDFIELDS ESPERANCE	GREAT SOUTHERN	KIMBERLEY	PILBARA
https://www.rdasouthwest.com.au https://www.swfutures.com.au	https://www.rdage.com.au	http://www.rdagreatsouthern.com.au/	https://www.rdakimberley.com.au	https://www.rdapilbara.org.au
Aquaculture Support	-	Survey of Food Production and Processing in the GS Region	Aquaculture report	-

Regional alliances and clusters are also forming to support economic development and investment attraction

REGIONAL*

		Mid West Food Industry Cluster
PROGRESS MIDWEST	NORHTERN GROWTH ALLIANCE (Investment Prospectus)	MID WEST FOOD INDUSTRY CLUSTER
Regional	Regional	Regional
Investment Attraction	Investment Attraction	Food Cluster
https://www.progressmidwest.com.au/	https://www.wheatbelt.wa.gov.au/our-priorities/northern-growth-alliance/	https://mwcci.com.au/2020/02/28/mid-west-food-industry-cluster/

* Primarily operated out of the Local Councils in Collaboration with the Development Commissions

SCIENCE – CSIRO is the leading commonwealth science facility, there are a number of supporting professional associations







NATIONAL AGENCIES

			
COMMONWEALTH SCIENTIFIC & INDUSTRIAL RESEARCH ORGANISATION	THE AUSTRALIAN INSTITUTE OF FOOD SCIENCE & TECHNOLOGY LTD	AUSTRALIA'S ACADEMIC AND RESEARCH NETWORK (AARNET)	SOCIETY OF PRECISION AGRICULTURE AUSTRALIA
National	National	National	National
Science, Research	Professional association	Network (actual)	Research, Extension
https://www.csiro.au	https://aifst.asn.au	https://www.aarnet.edu.au/	https://spaa.com.au
			
AUSTRALIAN INSTITUTE OF FOOD SAFETY	CENTRE OF FOOD SAFETY & INNOVATION (CFSI)	FOOD SAFETY INFORMATION COUNCIL	
National	National	National	
Food safety standards	Food safety R&D	Information sharing	
https://www.foodsafety.com.au/blog/food-industry-sectors-in-australia	http://www.foodsafetycentre.com.au/	https://foodsafety.asn.au	

* advise on business goals, what support available Federal and State, introductions;







EDUCATION – Six Universities serve WA F&B sector, Murdoch in particular stands out with it's focus on Future Foods

EDUCATION

			
MURDOCH UNIVERSITY	CURTIN UNIVERSITY	EDITH COWAN	THE UNIVERSITY OF WESTERN AUSTRALIA
State	State	State	State
Research, Future Foods Institute	Food Science, Engineering	Engineering, Nutrition	Food Science, Biotech
https://www.murdoch.edu.au https://www.murdoch.edu.au/research/ffi	https://study.curtin.edu.au/study-areas/	https://www.ecu.edu.au	https://www.uwa.edu.au
			
UNIVERSITY OF NOTRE DAME	UNIVERSITY OF QUEENSLAND (PERTH)		
State	State		
Health	Food Science (high ranking)		
https://www.notredame.edu.au	https://www.cqu.edu.au		

TRAINING – A handful of training agencies exist in WA that support the Agribusiness and Food Processing sectors

TRAINING STATE

 <p>AUSTRALIAN COLLEGE OF TRAINING ACT NOW FOR YOUR FUTURE</p>			
<p>AUSTRALIAN COLLEGE OF TRAINING</p>	<p>FOOD FIBRE AND TIMBER INDUSTRIES TRAINING COUNCIL (WA)</p>	<p>RURAL EDGE ALLIANCE (ex- Partners in Grain WA)</p>	<p>AGRISTART</p>
<p>State</p>	<p>State</p>	<p>State</p>	<p>Regional/State</p>
<p>Training – Food Certs, apprent, traineeships</p>	<p>Training Advice, Advocacy</p>	<p>Training, Workshops – Agri, Cropping</p>	<p>Training Accelerator[^], Networking, Hubs (Collie and Busselton)</p>
<p>https://auscollege.edu.au/about/</p>	<p>https://www.ffafttrainingcouncil.com.au</p>	<p>https://rurledge.org.au</p>	<p>https://www.agristart.com.au/</p>
 <p>training.gov.au A JOINT INITIATIVE OF THE AUSTRALIAN AND STATE AND TERRITORY GOVERNMENTS</p>	 <p>Government of Western Australia Department of Training and Workforce Development</p>		
<p>TRAINING</p>	<p>JOBS AND SKILLS WA</p>		
<p>National/State</p>	<p>State</p>		
<p>F&B Training courses</p>	<p>Courses connecting to TAFE[^]</p>		
<p>https://training.gov.au/Search</p>	<p>https://www.jobsandskills.wa.gov.au/jobs-and-skills-centre https://www.fulltimecourses.tafe.wa.edu.au/</p>		

[^] 5 locations across WA – with courses covering wine, horticulture, aquaculture and business [^] Harvest5 Agtech Accelerator – training programs (supported by GRDC, DPIRD, Agristart),

At the more local scale there are 85 organisations in the WA Grower Group Alliance; most focus on on-farm education, information sharing and RD&E



**GROWER
GROUP
ALLIANCE**
Together we grow



NOTE: Select Group Listed – Full list at <https://www.gga.org.au/grower-groups/gga-network-list/>; Groups range from 10 members to 350

GROWER GROUP ALLIANCE is a peak grower group organisation; GGA is broadening membership to include other sectors (e.g. honey, food, produce)







DETAILS		RESOURCES/PUBLICATIONS	PROFILE
NAME	GROWER GROUP ALLIANCE	<ul style="list-style-type: none"> - Annual Forum - Newswire Newsletter - GG Toolkit vol4 	<p>The Grower Group Alliance is a farmer-driven network that builds the capacity of grower groups and connects groups, research organisations and agribusinesses in WA.</p>
ADDRESS	28 Bridson Street Bassendean WA 6054		
PHONE	+61 429 909 799		
EMAIL	rikki.foss@gga.org.au		
WEBSITE	https://www.gga.org.au	FUNDING MODEL/INCOME STREAMS	MISSION
# OF STAFF	13 staff (9 FTE)	<ul style="list-style-type: none"> - State Funding (strong collaboration and agreements with DPIRD) - Commonwealth funding (grants, projects) - Sponsorship - In-kind time and resources 	<p>VISION: A producer-led system of agricultural innovation, adoption and collaboration. AIM: The GGA aims to increase the capabilities of grower groups across all primary production industries in WA to be able to lead and engage in agricultural RD&E.</p>
# OF BOARD	8		
# OF MEMBERS	85 (3 tiers) 43 tier one with voting rights	MEMBERSHIP FEES/CHARGES	ACTIVITIES/SERVICES
FOUNDED	2002	NIL	<ul style="list-style-type: none"> - Extension and capacity building training and workshops - Business support (business plans, grants advice, HR, Work safety etc.) - Benchmark and Build program - Networking events - Information and connector hub to increase collaboration - Broker Programs including the Drought Hub (\$20m) and the extension SW WA Drought Resilience Adoption and Innovation Hub* (including Biosecurity, Climate, AgDigi, Food Innovation)
COVERAGE	Members (Grower Groups e.g. Facey Group, SEPWA, BICWA) Associates (e.g. GIWA) Network Participants (e.g. Evergreen Farming)		

* <https://www.gga.org.au/activity/drought-innovation-hub/>

A handful of organisations in the GGA stand out for supporting growers to add value





STATE/LOCAL

			
SWEETER BANANA COOPERATIVE CARNARVON WA	WA FUTURE FOOD NETWORK*	WEST MIDLANDS GROUP	CERTIFIED ORGANIC BIODYNAMIC WESTERN AUSTRALIA INC (COBWA)
Regional	State	Regional [^]	State
Growers – sales, marketing, research	Network - F&B across supply chain	Farmers, add value, growth	Biodynamic - Growers
https://www.sweeterbanana.com	https://futurefoodnetwork.com.au	https://wmgroup.org.au/	https://www.cobwa.com.au

Other GGA members who support food companies are included in other sections e.g. VegeWA, CitrusWA, BICWA, HempCo

Other organisations in the GGA support local food and processing companies with various roles

REGIONAL

			
SOUTHERN FORESTS FOOD COUNCIL	GASCOYNE FOOD COUNCIL	MARGARET RIVER PRODUCERS ASSOCIATION	WESTERN AUSTRALIA FOOD INNOVATION PRECINCT (WAFIP) [^]
Regional	Regional	Regional – Margaret River	Regional - Peel
Advocacy, Marketing, Promotion	Promotion, Events	Promotion, Farmer's Market	Hub – Manufacturing, Govt, Uni, Science
https://www.southernforestsfood.com	https://www.gascoynefood.com.au	https://mrrpa.org.au/	https://www.peel.wa.gov.au/western-australian-food-innovation-precinct/

FUTURE FOOD NETWORK is starting to take on some roles of an industry body by supporting growers and F&B manufacturers



DETAILS		RESOURCES/PUBLICATIONS	PROFILE
NAME	WA FUTURE FOOD NETWORK	<ul style="list-style-type: none"> - Directory - Project research findings 	Future Food Network aims to support connection, innovation and collaboration across the supply chain to increase value in WA
ADDRESS	28 Bridson Street Bassendean WA 6054		
PHONE	+61 401 398 700	FUNDING MODEL/INCOME STREAMS	MISSION
EMAIL	hannah@futurefoodnetwork.com.au	<ul style="list-style-type: none"> - Membership fees - Sponsorship - Grants - Events (workshops, seminars, conference) 	Vision: The Future Food Network aims to build a connected, resilient and progressive food and beverage industry in Western Australia
WEBSITE	https://futurefoodnetwork.com.au/	MEMBERSHIP FEES/CHARGES	ACTIVITIES/SERVICES
# OF STAFF	3	Fees for Connectory Listing <ul style="list-style-type: none"> • Standard - free • Premium \$199+GST/quarter • Premium \$500 annually 	Producer Group <ul style="list-style-type: none"> - Peel Growers Hub (increase producer skills, increase access to R&D) - Themes – <i>research</i> for value-adding, sustainability, reduce farm waste; <i>sharing information</i> on farming technologies; <i>connecting</i> organisations across the supply chain
# OF BOARD	3		Network <ul style="list-style-type: none"> - Connecting across the supply chain - Industry Directory (across supply chain) - Workshops, Education
# OF MEMBERS	502 on mailing list		
FOUNDED	2021		
COVERAGE	F&B supply chain members		

OTHER – PEAK

NATIONAL ASSOCIATIONS






 Agribusiness Australia	 National Farmers Federation	 animalhealth AUSTRALIA
AGRIBUSINESS AUSTRALIA	NATIONAL FARMERS FEDERATION	ANIMAL HEALTH AUSTRALIA
National (State Councils)	National	National
Networking, Events, Educ, Membership*	Peak – Farmers advocacy	Peak - Health, Biosecurity
https://www.agribusiness.asn.au	https://nff.org.au	https://animalhealthaustralia.com.au

* Membership slides from \$44,000 to \$220 annually

OTHER – ASSOCIATED - CROSS CUTTING

Other suppliers support the sector

NATIONAL AGENCIES

	 <p>AIP AUSTRALIAN INSTITUTE OF PACKAGING</p>	 <p>APCO AUSTRALIAN PACKAGING COVENANT ORGANISATION</p>
PRINTING INDUSTRIES ASSOCIATION OF AUSTRALIA*	THE AUSTRALIAN INSTITUTE OF PACKAGING (AIP)	AUSTRALIAN PACKAGING COVENANT ORGANISATION (APCO)
National	National	National
Advocacy Standards	Training & Education	Co-regulatory packaging
n/a	http://aipack.com.au	https://apco.org.au
 <p>A better choice! Quality FRESHNESS Service</p>	 <p>FIAAA Safe feed for animals</p>	 <p>Australian Organic</p>
A BETTER CHOICE	FEED INGREDIENTS AND ADDITIVES ASSOCIATION OF AUSTRALIA (FIAAA)	AUSTRALIAN ORGANIC LIMITED
National	National	National
Consumer Education, local food	Suppliers – advocacy, R&D, standards	Peak
https://www.abetterchoice.com.au	https://www.fiaaa.com.au	https://austorganic.com

* was Packaging Council of Australia

DOCUMENT STRUCTURE / AGENDA

KEY QUESTION

What problem are we trying to solve?

Do we need an industry organisation focused on WA food and beverage manufacturing?

What are our options for an industry organisation focused on WA food and beverage manufacturing?

APPENDIX I – GLOBAL MODELS
What does best practice look like?

APPENDIX II – WA STOCKTAKE
What do we have currently?

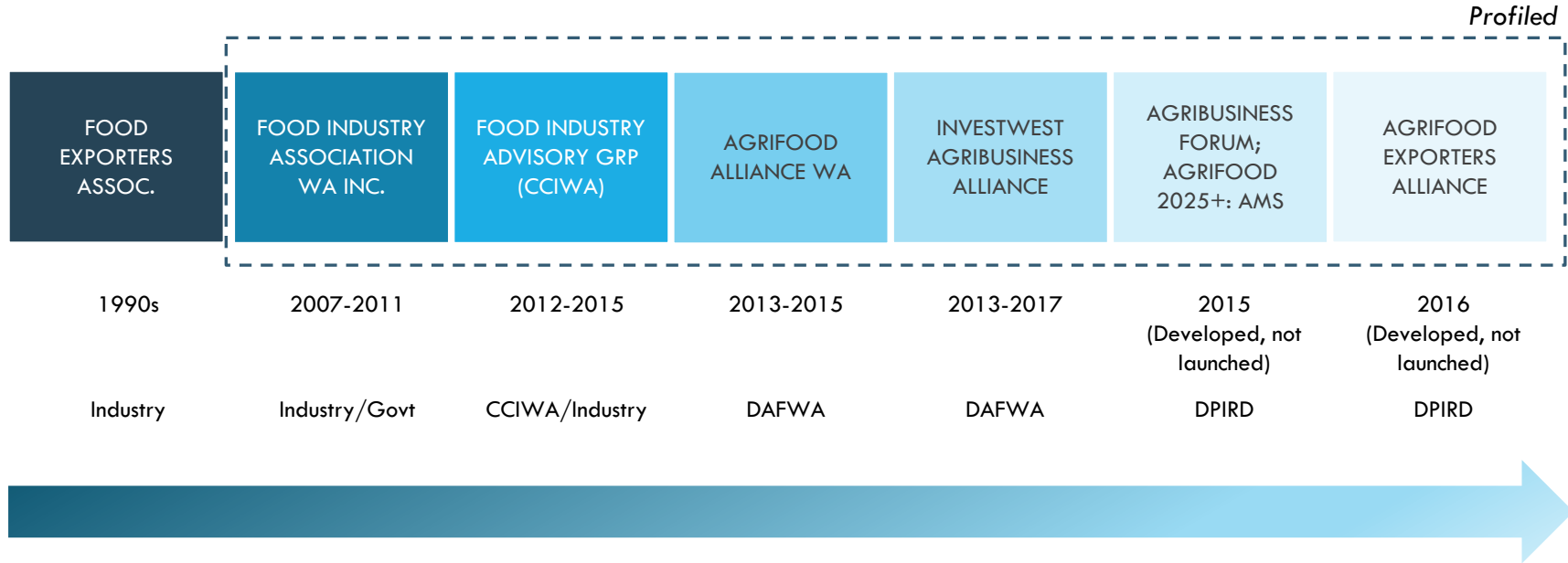
APPENDIX III: PAST WA GROUPS
What have we had before?

DETAILS/SUB-QUESTIONS

- What is the WA context for this project? (e.g. diverse, geographically spread out, majority small and medium size enterprises)
- Is there a 'gap in the market' in WA identified through this stocktake?
- Why have past organisations failed? What are the critical factors of success?
- Is there sufficient appetite from industry in WA to drive and fund a [potentially new*] representative group with sufficient shared interests?
- How can WA action these findings to establish (or reframe) a WA food and beverage manufacturing industry group, including funding requirements, governance/structure, and critical factors of success?
- What are the details of proven, successful global models adapted to fit with the WA context of diverse, geographically spread out, majority small and medium size enterprise? What is a clear framework for WA to follow based on these models? How can new models either fill the gap in the market (or assist existing organisations) to better support the WA food and beverage manufacturing sector?
- What are the short, medium, and long-term funding structures of the identified models?
- Is there a role for government? If so, what level of support would be required and for what term to establish a sustainable business model?
- What proven, successful global models of industry groups - that fit with the WA context of diverse, geographically spread out, majority small and medium size enterprises - exist?
- What agrifood industry groups (including quasi-government agencies, formal and informal arrangements) are currently operating in WA? Who and where do they represent? What is their funding model? What services do they provide? What is their role or function?
- What agrifood industry groups (including quasi-government agencies, formal and informal arrangements) are currently operating or have operated in WA?

Western Australia has had many attempts at a F&B Industry body

WA INDUSTRY ORGANISATIONS DATES AND LEAD



These groups ranged in focus across policy and strategy to investment and collaboration driven primarily by the Department of Agriculture

HISTORICAL WA F&B INDUSTRY ORGANISATIONS

NAME	DATE	MEMBERSHIP	PURPOSE	WHY DID IT FAIL?
FOOD EXPORTERS ASSOC.	1990s	Food Exporters	- Historical association with historical limited details	- Not enough support
FOOD INDUSTRY ASSOCIATION WA INC.	2007-2011	F&B manufacturers Small to SME	- Input into <u>policy</u> and develop <u>strategies</u> for industry issues - Promote and facilitate <u>value adding</u> to WA primary products - Facilitate and encourage <u>market development</u> – domestic and export	- Lack of funding - No robust funding model
FOOD INDUSTRY ADVISORY GROUP (FIAG)	2012-2015	AgriFood firms	- Forum and <u>reference group</u> - Raise food industry issues and develop <u>policy</u> responses - Many predecessors	- Lack of funding - Lack of support (political) - Didn't serve a large industry
AGRIFOOD ALLIANCE WA	2013-2015	WA Peak Industry Groups	- Enable groups to <u>coordinate</u> and steer effort at a whole-of-sector level	- Budget issues - Low industry ownership - Didn't serve a coherent group
INVESTWEST AGRIBUSINESS ALLIANCE	2013-2017	Companies, Industry Orgs, Government and Educ institutions	- Foster relationships to <u>co-ordinate investment</u>	- Agribusiness Expansion unit closure (restructuring of Govt department) - Not supported by industry
AGRIBUSINESS FORUM; AGRIFOOD 2025+: ASIAN MARKET SUCCESS	2015	AgriFood leaders (proposed)	- Inspired by Te Hono (sales <u>collaboration</u> by major NZ firms and <u>educational</u> offshore boot camps); ongoing	- Concept developed not launched
AGRIFOOD EXPORTERS ALLIANCE	2016	Exporters	- TBD	- Concept developed not launched

PROFILED

ABBREVIATIONS

ABARES	Australian Bureau of Agricultural and Resource Economics and Sciences	mt	Metric tonne
AR	Annual Report	NSW	New South Wales
b	billion	NT	Northern Territory
CAGR	Compound Annual Growth Rate	pa	Per annum
DAFWA	Department of Agriculture and Food, Western Australia	QLD	Queensland
DSD	Department of State Development	ROW	Rest of World
EU	Europe	SA	South Australia
FAO	UN Food and Agricultural Services	t	Tonne
FOB	Free on Board	USA/US	United States of America
FTA	Free Trade Agreement	WA	Western Australia
m	Million	YE	Year End



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