



Food & Drink

Summary Report

2015

SEMLEP

South East Midlands
Local Enterprise Partnership

SEMLEP Food & Drink Summary Report

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1. Purpose of the report

In Spring 2014, SEMLEP commissioned the University of Northampton to undertake a review of the Food and Drink sector in the South East Midlands in order to gain a better understanding of the key issues facing businesses and to establish a proposition for attracting new companies to the area, up skilling its existing workforce and supporting existing businesses to grow. The research focused on the Food and Drink Manufacturing, Agriculture and Farming, Wholesale and Packaging sectors.

This report summarises the key findings from the research with a specific focus on Food and Drink Manufacturing sector in regards to the key issues, strengths, challenges and opportunities.

This report will inform the next steps of the Food and Drink Task Group that has been established to take forward the findings and develop a clear strategy for supporting existing businesses and start-ups, attracting inward investment and addressing skills shortages.

2. Methodology

The research carried out by the University of Northampton examined both specialist subscriber based databases and publicly available information on the food and drink industry, to build a database of companies and compare the presence of different sub-sectors within the industry with the national picture. The database contains 2,486 Food and Drink companies of which 778 companies are in the primary, secondary, wholesale or packaging sectors.

The focus of the research was on agri-food, i.e. value-added food and drink processing and manufacturing. Analysis of the data gathered show an overview of the food and drink industry in the region, using Office for National Statistics (ONS) data and other sources to analyse each local authority cross-referred with Standard Industrial Classification (SIC) codes for the following parameters:

- Number of companies
- Size in terms of revenue and employment
- Profile in terms of micro, small, medium or large companies
- Location Quotient

This Summary Report consolidates this research and also considers other data from the ONS Business Register Employment Survey 2013, a Sector Review report of the South East Midlands (TBR Consultancy) and SEMLEP Business Survey 2014 in order to gain a fuller picture of the sector and the challenges it faces.

Note: it is not possible from this database to get a completely accurate picture, due to incorrect categorisation and incomplete data.



3. Overview of the UK Food and Drink Manufacturing Sector

Key Issues

BUSINESS GROWTH

The Food and Drink Manufacturing sector accounts for £76 billion (Gross Value Added). With over 7,000 businesses employing around 400,000 people, it is the largest manufacturing sector in the UK.¹

The sector has built a reputation for being economically resilient, producing high quality goods, leading on Research and Development (R&D) and setting standards internationally.

The sector invests over £350m annually into R&D. This means the sector brings around 16,000 new products to the market every year.²

In 2013, Food and Drink Manufacturing exported around £12.8bn of goods. This represents an increase of 5% from the previous year.³

The Food and Drink Manufacturing sector comprises of a number of sub sectors mainly:

- Animal feeds
- Bakery
- Beer
- Confectionery
- Dairy
- Fish processing
- Manufacture of distilled alcohol drinks
- Manufacture of mill and starch products
- Manufacture of oils and fats
- Mineral water and soft drinks

Despite being the largest manufacturing sector in the UK, the sector has seen its workforce size fall during a period of rapid technological advances, pressures on costs and margins, globalisation and off-shoring, extensive merger and acquisition activity, and the growth in market power of the retailers. Between 2000 and 2007, 80,000 jobs were lost, equivalent to a 16% drop in employment levels. These job losses were mainly from the meat processing and bakery sub-sectors.

1. UKTI, Investing in the UK Food and Drink Manufacturing Sector, 2014. 2. Ibid. 3. Ibid.





SKILLS

However the sector is forecast to grow. Employment projections suggest the Food and Drink Manufacturing sector will need around 137,000 new recruits between 2007-2017 to replace those retiring or leaving the sector for other reasons. Future demands are expected in higher skilled occupations, including managers, senior officials, professionals and skilled trades.⁴

WIDER POLITICAL AND ECONOMIC CONTEXT

The Food and Drink sector operates within a wider political and economic context. This is due to increased global competition, changes in consumer behaviour, increasing regulation by the Food Standards Agency and a growing obesity problem and the use of healthier ingredients, in addition to greater regulation on health and safety at work.⁵

4. Improve AACs LMI report 2010 and UK Labour Market Information Profile 2009/2010

5. Food and Drink Federation

4. South East Midlands Food and Drink Manufacturing Sector: Key Issues, Challenges, Strengths and Opportunities

Introduction

The South East Midlands is located between London, Oxford, Cambridge and the rest of the Midlands. It is well served by major road networks from London (including the M40, M1, A1(M) and M11 motorways), as well as by major rail routes (Chiltern Line, West Coast Mainline, Midland Mainline and East Coast Mainline). The area also benefits from London Luton airport and proximity to both Heathrow and Stansted.

Its strategic road, rail and airport links makes it an attractive location for the Food and Drink Manufacturing sector. In fact, the area's attractive surroundings, road and rail network are the three most highly rated aspects by over half of South East Midlands businesses when asked to rate the best aspects of the area from a business perspective.⁶

The South East Midlands consists of larger urban areas such as Luton, Bedford, Northampton, Milton Keynes and Aylesbury interspersed with large rural areas and a number of attractive market towns such as Banbury, Bicester, Towcester, Kettering and Ampthill. This coupled with its strategic road, rail and airport networks has led to a diverse range of agricultural and manufactured food products, from fresh and arable farm produce through to dairy products, craft beers, chilled foods, continental foods and a wide range of meat products.

Whilst this report is concerned with the key challenges, strengths and opportunities of the Food and Drink Manufacturing sector, it will briefly examine the wider Food and Drink sector that supports the manufacturing businesses. In particular the report will consider the importance of Agriculture and Farming (primary sector) and the supply chain (support sector) and how they form a critical part of meeting consumer demands and keeping pace with global competition and changes in technology. The Food and Drink Manufacturing sector is of key interest together with Packaging and Logistics because these sectors are likely to have advanced engineering related jobs requiring higher level skills. These sectors also attract significant investment in capital and research and development.

6. SEMLEP Business Survey 2014



Key Issues

BUSINESS GROWTH

The Food and Drink sector comprises of four main components: Primary (Agriculture and Farming), Secondary (Processing and Manufacturing), Tertiary (Foodservice and Grocery retail) and Support sectors (Packaging, Logistics and Distribution).

There are around 778 businesses within Agriculture and Farming (316), Wholesale (251), Manufacturing and Processing (191) and Packaging (20) employing around 26,100 people. The majority of businesses (88%) are small to medium sized employing fewer than 249 people. Whilst the greatest number of businesses is in Agriculture and Farming (316), the sub sector has a very small workforce (400) and is predominantly made up of micro businesses (employing fewer than nine people). However the number of employed is likely to be higher as this excludes seasonal employment.⁷

Research by University of Northampton suggests that it is more likely to be around 1,500 employed. This includes owners and/or shareholders of the company. The sub sector however plays a vital role in the supply chain by providing the raw products to Food and Drink Manufacturers. There is limited evidence as to what degree the sub sector provides raw products to locally based Food and Drink Manufacturers. In comparison, the Food and Drink Manufacturing sector employs around 16,300 people and has a greater number of medium to large sized businesses than Agriculture and Farming and Wholesale together. Overall the total turnover for Agriculture and Farming, Wholesale, Manufacturing and

Processing and Packaging is £7.2bn. The Food and Drink Manufacturing sector has the largest turnover compared to the other sub sectors at £5.8bn.

The rural economy continues to play a critical role in delivering jobs and business growth across the South East Midlands with areas such as Northampton, Bedford and Cherwell accounting for just over half (50.1%) of Agriculture and Farming businesses.

In comparison Northampton, Milton Keynes and Bedford account for around 40% of all businesses in Manufacturing and Processing which includes well known international food and drink manufacturers such as Carlsberg and Coca Cola. This may be due to the strategic location and proximity to major road and rail networks that attracts more businesses to locate within and around these three major towns.

However Packaging, plastics and labelling businesses are spread evenly across the South East Midlands. In regards to Food Wholesale and Agents, South Northamptonshire accounts for the greatest proportion of businesses in this sub sector compared to all other areas (20%) and the sub sector itself is strong within the local authority area accounting for 60% of all Food and Drink businesses.

7. University of Northampton, Centre for Citizenship Enterprise and Governance, SEMLEP Food and Drink Industry database, 2014

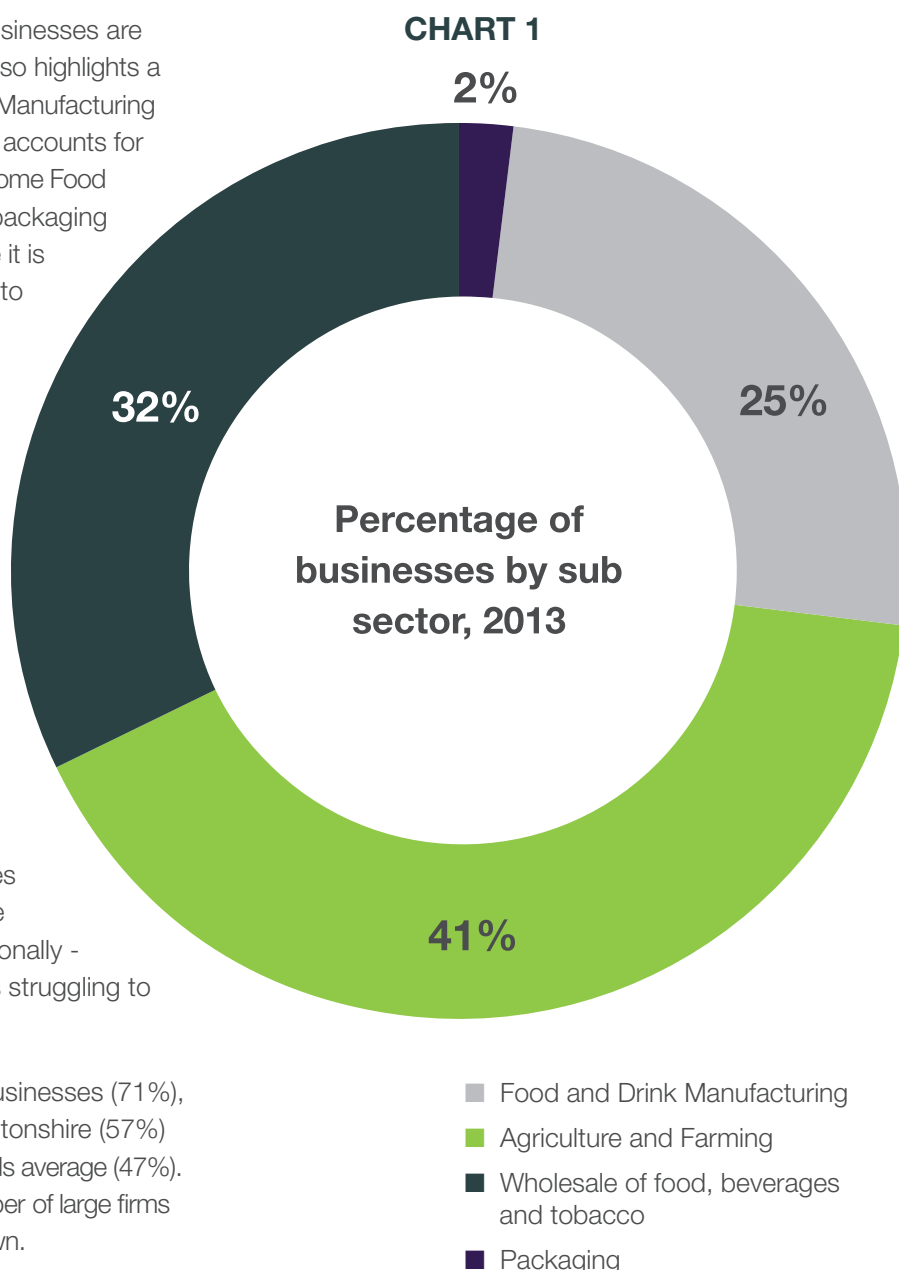
Chart 1 shows that the majority (41%) of businesses are within Agriculture and Farming. However it also highlights a significant proportion within Food and Drink Manufacturing (32%) and Wholesale (25%). Packaging only accounts for 2% of all businesses. It may be possible that some Food and Drink Manufacturers are sourcing their packaging outside of the South East Midlands because it is more economical for them to do so in order to keep the costs down for the consumer.

Overall the Food and Drink Manufacturing accounts for about 0.3% of all businesses within the South East Midlands. However output in 2012 was £829.3m which represented about 3% of total GVA for the South East Midlands⁹

As described earlier the majority of businesses across all four sub sectors are SMEs. However this increases to 98% for Agriculture and Farming and Wholesale and 70% of all Food and Drink Manufacturing and Packaging. In Food and Drink Manufacturing, 45% of businesses are small or micro-businesses, reflecting the polarisation in size that has been noted nationally - some very big players and many small firms struggling to bridge the gap.

Bedford has the largest number of micro-businesses (71%), with Aylesbury Vale (57%), South Northamptonshire (57%) and Daventry (50%) above South East Midlands average (47%). In comparison Corby has the highest of number of large firms accounting for 39% of all businesses in the town.

Whilst there is limited evidence on barriers to growth for the Food and Drink Manufacturing sector, the SEMLEP Business Survey 2014 highlights that businesses in the Manufacturing and Advanced technology sector (including Food and Drink) are significantly more likely to cite transport costs (46% cf.38%) and the high cost of labour (44% cf. 29%) as constraints on growth.⁹



9. SEMLEP Business Survey 2014

Source: University of Northampton, Centre for Citizenship Enterprise and Governance, SEMLEP Food and Drink Industry database, 2014

Table 1: Number and percentage of businesses by employment size, 2013

		MICRO		SMALL		MEDIUM		LARGE				UNSPECIFIED	
SIC Codes	Sub Sector	No.	%	No.	%	No.	%	No.	%	Sub Total	%		TOTAL
0.01	Agriculture & Farming	64	75%	14	16%	6	7%	1	1%	85	100%	231	316
10	Manufacturing & Procurement	17	19%	23	26%	22	25%	26	30%	88	100%	103	191
17 & 22	Packaging	0	0%	4	40%	3	30%	3	30%	10	100%	10	20
64	Wholesale	35	53%	20	30%	11	17%	0	0%	66	100%	185	251
TOTAL		116	47%	61	24%	42	17%	30	12%	249	100%	529	778

Source: University of Northampton, Centre for Citizenship Enterprise and Governance, SEMLEP Food and Drink Industry database, 2014

Note: Only 249 of 778 supplied information about number of employees

Table 2: Number and percentage of businesses by employment size by local authority, 2013

		MICRO		SMALL		MEDIUM		LARGE			
Local Authority		No.	%	No.	%	No.	%	No.	%	TOTAL	%
Aylesbury Vale		8	57%	2	14%	2	14%	2	14%	14	100%
Bedford		30	71%	5	12%	4	10%	3	7%	42	100%
Central Beds		7	41%	7	41%	1	6%	2	12%	17	100%
Cherwell		18	47%	9	24%	8	21%	3	8%	38	100%
Corby		2	11%	4	22%	5	28%	7	39%	18	100%
Daventry		3	50%	0	0%	2	33%	1	17%	6	100%
Kettering		2	20%	4	40%	2	20%	2	20%	10	100%
Luton		6	29%	9	43%	4	19%	2	10%	21	100%
Milton Keynes		17	45%	10	26%	7	18%	4	11%	38	100%
Northampton		15	48%	8	26%	5	16%	3	10%	31	100%
South Northants		8	57%	3	21%	2	14%	1	7%	14	100%
TOTAL		116	47%	61	24%	42	17%	30	12%	249	100%

Source: University of Northampton, Centre for Citizenship Enterprise and Governance, SEMLEP Food and Drink Industry database, 2014

JOBS

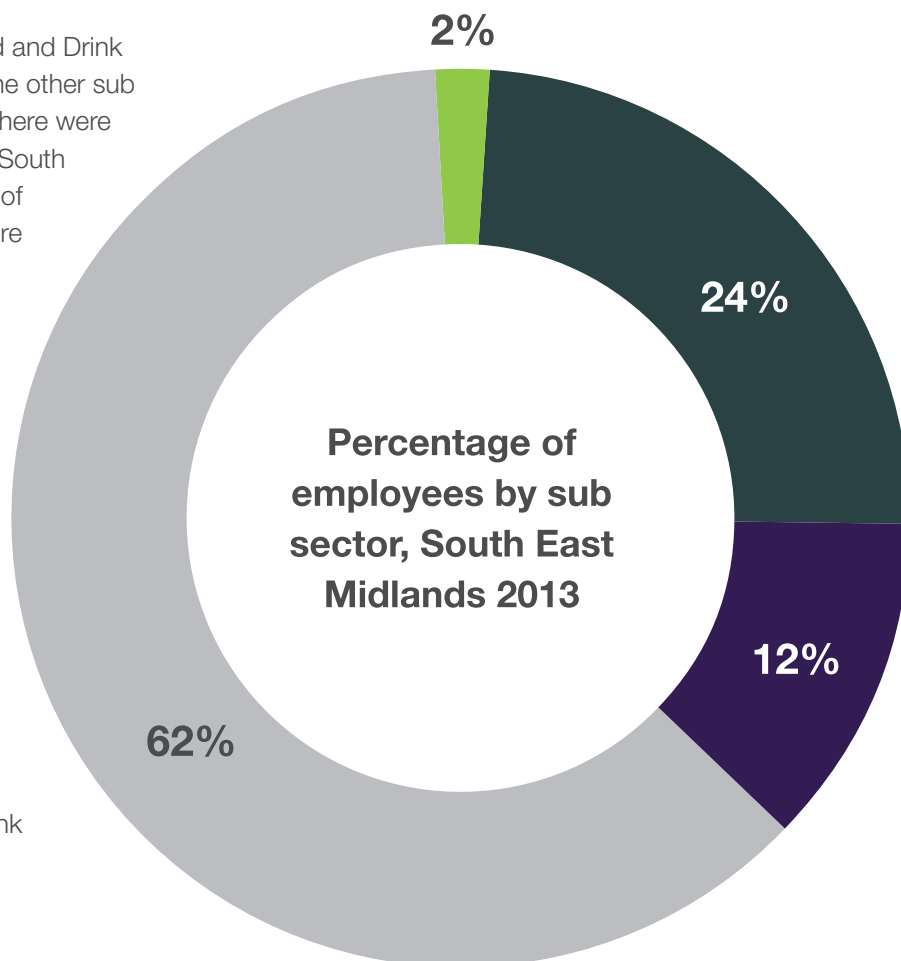
The majority of employees work in the Food and Drink Manufacturing sector (62%) compared to the other sub sectors as highlighted in Chart 2. In 2013, there were 16,300 employees in this sub sector in the South East Midlands. This represents an increase of 700 new jobs from 2012. In 2013, there were 6,300 people employed in Wholesale (24%) compared to 3,100 (12%) in Packaging. Both Wholesale and Packaging witnessed a decline in the number of jobs between 2012 and 2013 by 500 and 100 people respectively.

In terms of local authority areas, Corby employs the most people (4,000) in the Food and Drink Manufacturing sector. In 2013, this accounted for 25% of the total number of people employed in this sub sector in the South East Midlands. This is closely followed by Northampton (2,300) and Milton Keynes (2,200) both of which have strong clusters of Food and Drink Manufacturing businesses.

SECTOR STRENGTHS

When examining the concentration of employment in each sub sector compared to the national share (Location Quotient), the South East Midlands area has a significantly stronger concentration of employment in the Food and Drink Manufacturing sector than the national average with a Location Quotient of 1.6. Analysis by local authority area highlights a number of sector strengths across the South East Midlands.

CHART 2



- Food and Drink Manufacturing
- Agriculture and Farming
- Wholesale
- Packaging

Northamptonshire

Corby is the main hot spot area with key strengths in the manufacturing of grain mill products, starches and starch products (39.6) and processing and preserving of fruit and vegetables (22.9). Northamptonshire has a strong food and drink sector with for example Northampton having a higher than the national share of employment in the manufacturing of beverages (6.0). This is not surprising given that Northamptonshire is home to Carlsberg and several other breweries and micro-breweries, vineyards and cider makers. The sector is a major employer in the area and is also the base for 10% of the UK's total wheat storage, milling and processing capacity.

Bedfordshire

Central Bedfordshire also has strengths in the manufacturing of wheat related products, starches and starch products (9.7). Indeed the area is home to one of the nation's favourite cereal brands, Jordans Ryvita. Bedford has the second biggest share of employment (5.3) in Drinks Manufacturing in the South East Midlands when compared to the national share in that sub sector.

Buckinghamshire

Milton Keynes has a varied mix of food and drink businesses, with some major brands such as a Coca Cola canning and bottling plant (one of 6 in the UK) and a focus on drinks and distribution. Aylesbury Vale on the other hand has a major concentration of food processing plants and has been successful in generating significant inward investment based on advanced innovation, engineering and processing. This includes in 2014 the opening of Arla, the world's biggest dairy production company and McCormick which opened in the 1990s.

Oxfordshire

Cherwell has a large number of agricultural businesses but the revenue and employment is mainly in food manufacturing, with some incidence of packaging and wholesale. Major companies include Mondelez and Kraft.



A review of the characteristics of major businesses with significant presence by workforce size and/or by turnover highlight the following sub sectors as being active within the Food and Drink Manufacturing sector in the South East Midlands.

1. Milling and cereal (centred around Corby, Kettering and Bedford)

This sub sector has some well-known brands including European Oat Millers, Heygates and Weetabix some of which have been established for a long time within the area.

2. Spices, seasoning, flavourings and ingredients

Azelis, British Pepper & Spice, McCormicks, NatCo, Newly Wed Foods, Roquette

There are clear signs of an interesting mini ‘cluster’ effect with some high profile consumer facing brands and some lesser known firms engaging in a lot of R&D to meet the drive for clean products with healthy ingredients.

3. Chilled foods

Brixworth Pate, Greencore, Houghton Hams, Solway Foods, TMI, York House

Large factories dedicated to the food to go market such as Greencore have long been present in the region, as is the Chilled Food Association trade body and research centre which is based in Corby.

4. Health, wellness and functional foods (centred around Central Bedfordshire)

Alpro, Jordans & Ryvita and Unilever/Colworth Science Park

These high profile names are involved with functional foods, and this is a major growth area to be capitalized upon, with Colworth Science Park as an open innovation science park in health, wellness and functional foods.

5. Brewing (centred around Luton, Northamptonshire and Bedford)

Carlsberg, Charles Wells and Hook Norton are major employers in the area. Historic ties with Northamptonshire and Bedfordshire with large companies who have withstood the ongoing consolidation in the beer industry or who have invested heavily in the area. The antidote to the big multinational brewers is the growth of micro-brewers, also evident in other parts of the South East Midlands. In addition, Luton is the headquarters for a number of large brewing chains due to its close proximity to London. Some of these large brewing chains have diversified into leisure conglomerates such as Whitbread.

It should also be noted that the South East Midlands is a key national hub for both food and drink logistics, and distribution with brands such as Booker, John Lewis, Coca Cola, AG Barr and Sainsbury's all having distribution centres within the area. Wholesalers such as Medallion Foods and Bedford Continental also have their national base within the South East Midlands.

INFRASTRUCTURE

Despite the sheer wealth of Food and Drink Manufacturing businesses in the South East Midlands, some areas may lack the necessary infrastructure for food graded premises. Furthermore there may be a lack of a co-ordinated approach to identifying and planning for premises that are appropriate for Food and Drink Manufacturing businesses. In some cases it is led by an inward investment inquiry to find the right location and premises. As a result the planning process and environmental health regulations involved in identifying an appropriate site and building a food graded premises may deter businesses from choosing to locate here.

In fact when businesses are asked about what are the worst aspects of South East Midlands as a business location, businesses in the Manufacturing and Advanced technology sector (incl. Food and Drink) are more likely than average to mention that the area/premises is old/run down and needs updating (15% cf. 3%)¹⁰. Whilst this relates to a much bigger sector it does suggest the need to do some further analysis to establish to what extent this applies to the Food and Drink Manufacturing businesses.

10. SEMLEP Business Survey 2014

INNOVATION ASSETS

Universities and Colleges

The South East Midlands has a number of leading centres of research, innovation and knowledge creation. The area benefits from a number of prestigious and diverse universities. These are the Open University, Cranfield University, University of Buckingham, University of Bedfordshire, University of Northampton and Bucks New University. The area's place on the 'innovation triangle' is formed by the university centre's of Oxford and Cambridge.

Both Cranfield and Northampton are active in the Food and Drink sector. Cranfield University has strong links to the food and drink industry and is renowned internationally for its expertise in food specialising in research areas especially food quality and such areas as shelf life, mycology, post-harvest technology, contamination, nutrition and micro-biology. However much of Cranfield's work is outside the region. This suggests a largely untapped potential opportunity to engage with local Food and Drink manufacturers. Cranfield University offers a selection of specialist food related courses.

However there is a risk that such knowledge is not transferred to the workplace in businesses across the South East Midlands but instead used elsewhere in the world.

In contrast, the University of Northampton has world renowned expertise in waste management with considerable experience of food and drink waste streams, and a growing capability in logistics and supply chain management. A new Institute of Health and Wellbeing has been established in the School of Health, which is currently focused on disease rather than diet. However there could be scope to diversify its offer to meet the growing consumer trend towards healthier food choices such as wheat and gluten free products and low sugar alternatives.

One in eight businesses (12%) has any links with universities or colleges for research and development (R & D) purposes, an increase of 4% since 2013 (8%). However around 1 in 5 businesses within Manufacturing and Advanced



Technology (18%) are more likely to have links with universities or colleges.¹¹ This includes Food and Drink Manufacturing however further analysis may be required to understand what this means for this sub sector and the level of collaboration with universities on R&D.

All but one of the Further Education colleges offer courses in hospitality and catering thus suggesting that demand for vocationally based hospitality and catering or food and beverage management courses is well served. However there are no undergraduate food science, technology and engineering degree courses offered at present by the universities. Given the strong presence of the Food and Drink Manufacturing sector in the South East Midlands, this suggests a gap in provision.

At school level, the national curriculum offers food technology at GCSE, but there is no UTC focused on food and drink within SEMLEP at present. Of more immediate effect would

be a concerted effort by industry to reach out to schools to arrange presentations, tastings and factory visits to raise awareness of the high tech nature of the industry. The Arla Employer Ownership Pilot and their engagement with national food and drink manufacturers represents an opportunity to see how lessons learned from this pilot can be applied across the South East Midlands with their thought leadership as well as building on skills initiatives like Arla and Coca Cola in Milton Keynes engaging with schools.

11. SEMLEP Business Survey 2014



Innovation Centres

There are 36 innovation centres across the South East Midlands many of whom benefit from the strong involvement of Universities in promoting and running innovation centre facilities, as well as offering services to assist emerging businesses with programmes to access or collaborate in research. Most of these are office style serviced units for start-up businesses, and other than Colworth Science Park and Cranfield Technology Park have no particular infrastructure or link to the food and drink industry and several are close to a university with access to their research facilities. The office based units are, though, suitable for incoming manufacturers as an initial UK market base for marketing and sales purposes.

However we could do much more to further capitalise upon these assets to increase their positive influence in the economy, better engage with local Food and Drink Manufacturing businesses and so take advantage of the opportunity they offer in particular through driving future productivity improvements for both new and existing businesses across the South East Midlands.

Colworth Science Park in Bedfordshire is one of the most important assets in Food and Drink Research and Development for the South East Midlands. It is home to Unilever's Global Development Centre for ice cream and beverages, Unilever R&D, its Patent Group and its Global Safety and Environmental Assurance Centre. The Park also has labs and office space to rent to start-up and small businesses involved in the food, health and wellness sectors. The management of the Park aims to be a focus for food and drink, and to ensure that tenants gain maximum advantage from access to networks, funding, business resources and contacts. With over 600 employees from 30 different nationalities, they bring together diverse scientific and technical expertise including plant science, cell and molecular biology, health psychology, social science, engineering, physical sciences, and environmental and human health sciences. Specialists in information and technology

management ensure that R&D scientists worldwide can access the information they need to carry out their work efficiently. Colworth has been at the forefront of industrial research for 60 years, and provided much of the early innovation to support Unilever's expanding interests in new businesses such as agribusiness and frozen foods in the 1960's and 70's. It was responsible for breakthrough technologies including the pyramid tea bags, and a range of healthier great tasting and exciting ice creams, as well as more recently the HeartAge tool that support's lifestyle behaviour change.

The University of Cambridge maintains an office in Colworth and through this offers the area's food and drink companies access to the University's Institute for Manufacturing (IfM). IfM promotes the concept of 'open innovation', which involves working with a range of possible external partners including customers, suppliers, universities, consultancies, and individual inventors and can be implemented by firms of all sizes, between just two firms, or may involve multiple partners.

SKILLS

There is limited data on the skills and occupation levels of those who work in the Food and Drink Manufacturing sector in the South East Midlands. Compared to England, a higher than average proportion of employees in the Food and Drink Manufacturing sector in the South East Midlands is qualified to A-level or above. However the sector suffers from a poor image as being low paid and mainly manual jobs when it comes to making career choices. However, the sector is forecasted at a national level to grow with future demands predicted in higher skilled occupations, including managers, senior officials, professionals and skilled trades. From an inward investment perspective, it is therefore important that we invest in advance level and career progression skills if we are to attract more Science, Technology, Engineering and Mathematics (STEM) related Food and Drink manufacturing companies to the South East Midlands.



5. Recommendations and Next Steps

1. Strengthen the evidence base on supply chain issues, availability of food graded premises, barriers to business growth, level of innovation, skills attainment and occupations within the workforce.
2. Build on the event at Colworth Science Park to understand the challenges faced by the Food and Drink sector around business growth, supply chain, skills shortages/gaps, introducing new products or research and development in their sector and what attracts them to the South East Midlands.
3. Develop SEMLEP's strategic approach for helping the local Food and Drink sector to grow.

APPENDIX - Examples of Food and Drink Manufacturing companies in the South East Midlands

1. BEDFORDSHIRE

- **AB INBEV UK LTD** – the UK arm of Annheuser Busch, one of the largest brewers in the world, has its UK base in Luton.
- **AZELIS** – UK base for global conglomerate and centre of food ingredients R&D and production.
- **BEDFORDIA GROUP** – has a diverse agriculture and eco-technology business portfolio that includes arable farmland, grain storage and pig production.
- **BLUNHAM CHILLIES** – a large producer of chillies, growing and packaging them for most of the major supermarkets.
- **COLWORTH SCIENCE PARK** – home to Unilever (see below) and a collection of food and drink related companies working in food, health and wellbeing.
- **EUROPEAN OAT MILLERS IN BEDFORD** – largest oat miller in northern Europe.
- **FOOD FRESHNESS TECHNOLOGY (IT'S FRESH! LTD)** – innovative smart packaging SME
- **SIGNATURE FLATBREADS, DUNSTABLE** – suppliers of naans and flatbreads.
- **JORDANS AND RYVITA COMPANY LTD** – produces flour, cereals and branded cereal bars.
- **LANTMÄNNEN UNIBAKE** – leading international Swedish owned bakery group with expertise in producing frozen and fresh products.
- **PARRIPAK FOODS LIMITED**, (owned by William Jackson Food Group) – leaders in supplying freshly prepared vegetables.
- **UNILEVER** – one of five global R&D facilities, worldwide centre for ice cream.
- **WELLS & YOUNG'S BREWING COMPANY** – established in 1875, this is the UK's largest private brewing company they produce award winning beer that is distributed to 33 different countries.
- **WHITBREAD** – no longer the brewer it once was, Whitbread PLC is now a multinational hotel, coffee shop and restaurant company headquartered in Dunstable, United Kingdom. It owns high profile brands such as Costa, Brewer's Fayre, Beefeater Grill and Premier Inn.
- **YORK HOUSE FOODS** – value-added meat producer supplying the large grocery and foodservice multiples.

2. BUCKINGHAMSHIRE

- **ARLA FOODS** – UK's biggest dairy company and largest supplier of butter, spreads and cheese. Planning consent was granted in 2011 to create one of the largest dairies in Europe in Aylesbury.

- **BRIOCHE PASQUIER UK** – French bakery group has announced plans to build a production plant in Milton Keynes where it has a commercial office.
- **COCA COLA** – major bottling and distribution plant in Milton Keynes.
- **FIDDES PAYNE** – established in 1993 in Banbury supplying a range of herbs and spices to the health food, independent and delicatessen trade.
- **MCCORMICKS** – the largest spice company in the world and a leader in the manufacturing, marketing and distribution of spices, seasonings and flavours to the food industry. McCormick's European Middle East and Africa HQ for sales and marketing is located in Aylesbury Vale.
- **NATCO** – a wholly owned subsidiary of the Choithram Group (based in Dubai) importing bulk spices and herbs and process and pack products, blends and dry ingredients for retail sale.
- **PURATOS** – Belgian specialist bakery, patisserie and confectionery company, located near Buckingham with an innovation centre in Fringford.

3. NORTHAMPTONSHIRE

- **ALPRO SOYA LTD** – Kettering based producer of soya milk and yogurt.
- **BAKEAWAY PRODUCTS** – a chilled home baking specialist supplying the UK multiple grocers.
- **BOKOMO FOODS** – one of the UK's leading cereal makers, owned by S. Africa's Pioneer Foods.

- **BRITISH PEPPER & SPICE** – major supplier of spices and seasonings to the retail trade.
- **BRIXWORTH PATE** – specialist artisan producer successfully selling into key London market.
- **CARLSBERG UK** – UK's fourth largest brewer. It is a wholly owned subsidiary of the Carlsberg Group. It employs around 1,800 people across 16 sites in the UK including its HQ and brewery based in Northampton.
- **CRP PACKAGING** – specialist food contact packaging producers now part of Smurfit Kappa.
- **DANISCO** – subsidiary of Du Pont based in Corby supplying wide range of food ingredients for food manufacturers.
- **FACCENDA FOODS** – integrated business delivering innovative fresh and convenience food solutions to the UK retail and food service sectors and largest chicken producer.
- **FARRINGTON OILS** – example of farmer turned producer of value-added food products now distributing nationally.
- **FFP PACKAGING** – Moulton Park based speciality food packaging company.
- **FOODMAKER LTD** – innovative supplier of dry blends of seasoning and spices.
- **FRUTAROM** – established in 1933, a global flavour and fine ingredients company, one of the ten leading companies in the world, in the field of flavours & fragrances.
- **HEYGATES** – large grain milling cereal group.
- **HOUGHTON HAMS** – specialist cured ham producer using locally sourced meat.
- **ITARUS** - fully integrated asset management solution leveraging the design to print process.
- **GREENCORE PREPARED FOODS, NORTHAMPTON** – provides chilled convenience foods.
- **NEWLY WEDS FOODS** - manufacturer of a range of coatings, seasonings and flavouring ingredients to the food industry, with depots in Corby and Banbury.
- **ROQUETTE UK LTD** – a manufacturer and distributor of starch products derived from agricultural raw materials, based in Corby.
- **SOLWAY FOODS** – chilled food company formerly part of Northern Foods now Two Sisters.
- **SYMRISE** – Corby based UK subsidiary of a major producer of flavours and fragrances.
- **SYNERGY** - leading global manufacturer and supplier of flavourings, extracts and essences.
- **TMI FOODS** - supply cooked ingredients throughout Europe and are the UK's leading manufacturer of cooked bacon, sausages and roasted vegetables.
- **WEETABIX FOOD COMPANY** – well-known breakfast cereal brand based in Kettering, recently acquired by Shanghai-based, Bright Foods (Group) Co Ltd.
- **WHITWORTH BROS** – independent specialist flour millers established in 1886 producing bakers, bespoke and heat treated flours.
- **WHITWORTHS LTD** – the UK's leading supplier of dried fruit, nuts and seeds for healthier snacking, breakfast, baking and cooking products.

4. OXFORDSHIRE

- **BARRY CALLEBOUT** – world's leading manufacturer of high-quality chocolate & cocoa products.
- **BRITISH BAKELS** – Bicester based bakery ingredients supplier.
- **FINE LADY BAKERIES, BANBURY** – providing own label bakery products to leading supermarkets and wholesalers. Also provides bread to sandwich making companies.
- **FRESH DIRECT LTD** – Bicester and Cambridge – national supplier to UK food service industry.
- **HOOK NORTON BREWERY** – an independent family business brewing handcrafted beers.
- **MONDELEZ INTERNATIONAL** – Europe's largest chocolatier and biscuit maker. It is also the second largest maker of candy and coffee. Mondelez Europe's site in Banbury (Kraft Foods) is their coffee Global Centre of Excellence.
- **NEWLY WED FOODS** – family owned global company leading in coatings, seasonings and flavour ingredients with factories in Banbury and Corby.

SEMLEP

South East Midlands
Local Enterprise Partnership

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