

# The Grocer

## Dairymen 2017

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It's been another turbulent year for UK dairy. Brexit and a big drop in UK milk production prompted a surge in commodity prices, with some suppliers warning shortages could hit retail shelves. Health officials ramped up their focus on the sector, forcing manufacturers to agree to dramatic sugar reduction targets. And there was a fresh wave of attacks on dairy farming from the media and vegan campaigners.

But while all brought new challenges to the sector, it also opened up new opportunities. Exports are booming, farmgate prices are finally rising, and there has been some fantastic innovation around low-sugar and high-welfare products.

So as Brexit and the sugar tax loom on the horizon, this year's Dairymen will explore how the industry can take advantage of the dramatic shifts in the market to build a brave new world for British dairy that will benefit the whole supply chain, from farmer to consumer.

### **A new dawn? What are the big Brexit opportunities for British dairy? – Kevin White ([kevin.white@wrbm.com](mailto:kevin.white@wrbm.com))**

The challenges are well rehearsed. Access to key markets. Labour shortages. Years of uncertainty. But amid the Brexit debris there will be opportunities too. This feature sets out where they lie and who is best placed to benefit from them.

### **Creative challenge: Great British Cheese campaign– Carina Perkins ([carina.perkins@wrbm.com](mailto:carina.perkins@wrbm.com))**

British cheese exports are booming, but at home, Cheddar is losing out as shoppers seek excitement in the Continental cheese aisles. And things could get worse if a post-Brexit trade deal with the US and other third nations floods the market with cheaper products. We challenge a creative agency to come up with a national PR campaign for British Cheese, to raise awareness of our wonderful regional varieties and remind consumers why British is best.

**Consumer research: What do consumers really think about dairy? – Carina Perkins  
(carina.perkins@wrbm.com)**

A digital special around the Dairymen that explores consumer attitudes on key dairy issues – from health to welfare and NPD, featuring custom research exclusively conducted for The Grocer Dairymen.

**Views from the Top: How should dairy fight back against negative press? - Carina Perkins  
(carina.perkins@wrbm.com)**

Dairy is increasingly under attack from animal welfare and vegan campaigners; plant-based milk alternatives are on the rise. If it doesn't formulate a robust, coherent industry response, dairy risks losing consumers – particularly millennials. We quiz senior executives in the dairy industry and crisis comms experts for their views.

**Dairy Has Got Talent – Beth Gault (beth.gault@wrbm.com)**

Attracting the right talent is a growing challenge for dairy manufacturer and farmers – and Brexit could make things more challenging. So what strategies are companies using to make sure they attract and retain the best of the best? And what could the industry do to make itself more attractive to school leavers and graduates?

**Excellence in Dairy Retailing – Kevin White (kevin.white@wrbm.com)**

From new dairy-free fixtures to other initiatives, who's revamped their dairy offer this year – and what's the rationale? A spotlight on five of the best fixtures.

**Dairy in Foodservice – Patrick McGuigan (pat\_mcguigan@yahoo.co.uk)**

Supermarkets and brands have come under huge pressure to source more British dairy in recent years, but we still import huge amounts - and a lot of it is ending up in foodservice, where there is less scrutiny over provenance. How likely is this to change? Do diners want more provenance? How might Brexit shake things up? And what are the dairy sourcing policies of the biggest players?

**Category reports**

**Focus on BSM - Natalie Brown (Natalie.brown@wrbm.com)**

Changing perceptions around health, Brexit-driven inflation and a greater focus on differentiation are having a big impact on BSM, prompting some retailers to embark on major category reviews often involving further range rationalisation in the category. So what changes are the major mults making to their BSM ranges, pricing and promotions to reflect the changing market? What sort of own-label innovation has there been? And how do brands plan to secure shelf space in the future?

**Focus on Cheddar - Nick Hughes (nickjhughes@hotmail.co.uk)**

Brexit-driven inflation has sparked a crisis in the Cheddar category, with manufacturers warning their margins have been wiped out by surging commodity prices as the pound crashed. With exports booming as UK Cheddar becomes more competitive, some claimed supermarkets could be left short of supplies unless they were willing to pay more. But retailers remain reluctant to increase retail prices in such a competitive category. Unlike in butter, where shelf prices have risen, Cheddar has been subject to further discounting. So how are manufacturers faring in this increasingly pressured environment? What impact has the situation had on distribution deals? Is there a tipping point for brands? And if retail prices do rise, will consumers walk away from the category?

### **Focus on Continental Cheese - Patrick McGuigan (pat\_mcguigan@yahoo.co.uk)**

The impact on sterling since the Brexit vote has sent import costs soaring – what affect has this had on the continental cheese brands? Have there been any big changes to supermarket pricing and promotion? What has happened to sales? Which cheeses have been/are likely to be worst affected by price hikes? Do the price changes mean British cheese rivals are more price competitive? And are retailers making changes to ranges as a result?

### **Focus on Dairy Alternatives – Beth Gault (beth.gault@wrbm.com)**

Flexitarianism is a growing force in the meat sector, but how is this trend playing out in dairy? What opportunities does it open up for alternatives to cow's milk? And what impact is it having on supermarket dairy ranging and merchandising?

### **Focus on Dairy Drinks – Ian Quinn (ian.quinn@wrbm.com)**

Dairy drinks brands have enjoyed good growth as they position themselves as a healthy alternative to fizzy pop – but a new bombshell from health officials means they could be subjected to the sugar tax if they don't make drastic changes to their products. What exactly are they proposing? What's been the reaction and how are brands, big and small, planning to respond? Could this hinder category growth? Does this bring new opportunities for dairy-free brand, and if so, why?

### **Focus on Ice Cream - Natalie Brown (Natalie.brown@wrbm.com)**

Luxury is the driving force in the ice cream sector, with Brits abandoning single-serve sticks and standard brands for luxury and premium tubs as they look for a little indulgence while they "Netflix and chill". So how have retailers and manufacturers responded with changes to products and ranging? And could brands come under pressure from own label as retailers catch up on the trend?

### **Focus on Milk – Nick Hughes (nickjhughes@hotmail.co.uk)**

Major supermarkets have launched free-range milk ranges this year. So what impact has this latest trend had on the market? How well executed have these launches been? What do free-range brands need to do to step up sales? How do they compare to the performance of farmer-friendly milks? And is ethical NPD the answer to reviving flagging milk sales, or do consumers only care about health and price?

### **Focus on Yoghurts - Ian Quinn (ian.quinn@wrbm.com)**

Yoghurt found itself at the centre of the health debate again last November after PHE proposed a single-size portion cap on pots to help Brits cut back on calories. Manufacturers have since agreed to a set of sugar reduction targets by 2020, including a 120kcal individual portion cap. So what progress have manufacturers made so far? Has bad publicity over sugar content had an impact on sales? And can a wave of "healthy" NPD help yoghurt reclaim its halo in a crowded breakfast market?

### **Focus on Dairy for Kids – Daniel Selwood (Daniel.selwood@wrbm.com)**

Health concerns have hit kid's lunchboxes - with yoghurts losing out last year amid fresh focus on sugar content, while cheese snacks enjoyed significant growth as parents packed some protein for their little angels. So are the same trends playing out in the home? What are kid's yoghurt and dairy drinks brands doing to ease concerns over sugar? And how are cheese brands capitalising on growth?