

***A Detailed Environmental Analysis of Brew & Co
Leading to the Development of an Outline
Marketing Plan***



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MODULE NAME:

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1. EXECUTIVE SUMMARY

This report sets out to conduct a situational analysis on Brew & Co., then create an outline marketing plan. This report will use a variety of models, the report will follow the SOSTAC model which is a six-stage model that uses the following elements: Situational analysis, objectives, strategy, tactics, actions, and control. A SWOT analysis will be used for the internal analysis of Brew & Co., a form of situational analysis that looks at a business's strengths, weaknesses, opportunities, and threats. A PEST analysis will be used to examine the external environment of Brew & Co., a PEST analysis looks at the political, economic, socio-cultural, and technological factors effecting a business.

Brew and Co. are a small artisan coffee shop based in Neath town centre, Brew & Co.'s internal strengths are identified as Place, and packaging which are two elements of the 7'ps sometimes referred to as the marketing mix, as well as their resources, they have a strong supply chain and motivated team. Brew & Co. are a new business, and this will prove as a weaker point. The external situation for Brew & Co. is positive, the political implications of Brexit are starting to become clearer and leaving less uncertainty among businesses. Economic factors effecting Brew & Co. are more complicated, the standard legislations such as that of minimum wage are to be followed faultlessly by all businesses and Brew & Co. are no exception, however the Covid-19 Pandemic could see more uncertain times on the horizon for all of large and small businesses alike. Socio-Cultural factors that weigh in on Brew & Co. are those of the health-conscious consumer, as well as specialist dietary requirements such as veganism, it is imperative that Brew and Co offer options that cater to as many dietary requirements as possible. The technological factors effecting Brew & Co. are limited, however they are still important, factors such as genetically engineered crops need to be given serious ethical consideration.

The overarching objective set for Brew & Co can be defined as 'Grow Market Share', for objectives to be successful they must be SMART (specific, measurable, achievable, relevant, and time specific),

EXECUTIVE SUMMARY

therefor this primary objective has been broken down into 4 smaller objectives: Open the first additional store (store #2) in the South West Wales area (Mumbles) by December 2022 , Open the second additional store (Store #3) in South West Wales area (Swansea City Centre) by April 2024, Open first additional store in England (store #4) (Bristol) by December 2025, and Open second additional store in England (Store #5) (Oxford) by December 2026.

It is imperative that Brew & Co have a strategy in place if they want to achieve the above objectives, the first step in creating a strategy is to understand who your market is, Brew & Co.'s market can be broken up into several sections however the main segments are, coffee lovers and individuals that come from higher than the UK average disposable income households; the market focus is that of the higher income households.

Brew & Co. currently create good quality consistent Instagram content, there reach should be expanded by employing a marketing assistant to create and manage accounts across all social media platforms. Brew & Co. currently have a paper-based loyalty Programme it will be essential for brew and co to review and adapt this programme to become hosted by an app-based platform that will be personalised and developed for Brew & Co. based on their customers needs and wants. It is imperative that control measures are put in place to ensure Brew & Co. are successfully achieving their objectives, monthly, quarterly, and annual meetings should be held. These meetings will discuss issues such as sales, targets and current issues at all levels. Meetings will also be held between the newly appointed marketing assistant and the business owners; the marketing assistant will pre-prepare data relating to the success of their current marketing campaigns. To conclude Brew & Co. are in a good position internally and externally to expand, however the implications of the current Covid-19 pandemic should be fully scoped before any attempts at growth are made; Brew & Co. should always ensure they remain in a stable financial position between and during each step of the expansions.

2. INTRODUCTION

2.1 REPORT REMIT

The remit of this report is to develop an outline marketing plan for the organisation Brew & Co. this will be done by conducting a detailed situational analysis of Brew & Co.

2.2 INTRODUCTION TO ORGANISATION

Brew & Co. (2020) is a small dog friendly artisan coffee shop based in Neath's town centre, brew & Co. was created by a couple with a passion for animals and coffee, with the intention to bring a sense of community to their coffee shop. Brew & Co.'s (2020) philosophy is to create a community within their coffee shops that represents the neighbourhood it sits within.

2.3 INTRODUCTION TO MODELS

This section looks to introduce the models as well as theories that will be applied throughout this report.

2.3.1 SOSTAC

Smith's (2019) SOSTAC model was created to help the marketer create the most effective digital marketing plan possible, Smith Created his method over a decade by analysing other marketing tools and identifying their common elements eventually synthesising them into a more user friendly model. Smith (2019) identifies his SOSTAC model as a six-stage plan, Situational analysis, objectives, strategy, actions, and control.

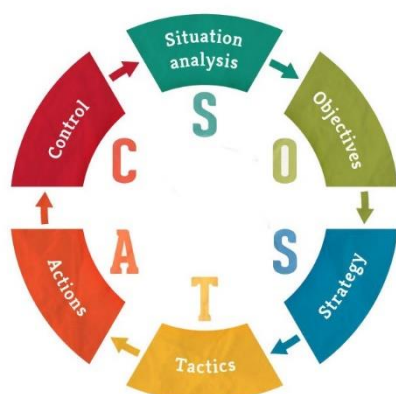


Figure 2.3.1 –

A Visual representation of Smiths SOSTAC Model

Reed-Fidm (2014) highlights Smiths SOSTAC model to be particularly effective due to the use of a situational analysis at the very beginning, continuing that the use of the situational analysis at the start of the model allows for a strong foundation in which the rest of the marketing plan can be developed. This report will apply Smiths six stage SOSTAC method to Brew & Co. to develop the outline for their marketing plan.

2.3.2 SWOT

Kotler (2003) refers to a SWOT analysis as a type of situational analysis that can be valuable to any business. Fifield (2010) adds to this and identifies a SWOT analysis to be a type of analysis that takes an in depth look into an organisations strengths, weaknesses, opportunities, and threats, continuing that an effective well conducted SWOT analysis is an essential tool when attempting to create positive change. This report will use the first half of the SWOT analysis to analyse the internal situation of Brew & Co., this section will focus only on their strengths and weaknesses.

2.3.3 PEST

Johnson, Whittington, and Scholes (2009) discuss a PEST analysis as a strategic analysis of the external factors that influence an organisation, adding that these factors are widely recognised to fit within four categories, political, economic, socio-cultural, and technological. Tribe (2010) describes a PEST analysis with a very similar narrative, stating that a PEST analysis is a strategic analysis of the political, economic, socio-cultural, and technological factors effecting a business. This report will use the PEST analysis to analyse Brew & Co.'s external situation

3. SITUATIONAL ANALYSIS

Chaffey and Smith (2013) highlight the use of situational analysis to be key when creating an insight into the current situation of an organisation, this is particularly useful when applied at the managerial level.

3.1 INTERNAL ANALYSIS

Kotler and Armstrong (2018) define the internal analysis to analyse the internal situation, outlining what is actually happening within an organisation, analysing the organisations current strengths and weaknesses, how the business is running, what is going wrong as well as how it can be improved.

3.1.1 STRENGTHS

Two of Brew & Co's strengths can be identified within what Blythe (2014) identifies as the Seven P's also known as the marketing mix, these are Place and packaging. Blythe (2014) identifies 'place' to be where the transaction for a product or service takes place, Brew & Co. (2020) have a good location in Neath town centre, with free short stay off street parking next door at the train station view Appendix A for details. Brew & Co (2020) have a modern and clean aesthetic instore which is followed through into their well branded simplistic recognisable packaging view Appendix B for details. Another strength identified for brew & Co. (2020) is its already available resources, having an established supply chain of local products as well as a passionate and motivated team. Additionally Brew & Co. have a unique strength in that of the dog friendly nature of their business, this gives them a competitive advantage over non dog friendly establishments, for customers who can utilise the convenience of not leaving their dog at home.

3.1.2 WEAKNESSES

It was difficult to identify weaknesses for Brew & Co. due to not being an internal member of staff, however it was identified that Brew & Co. (2020) are a relatively new business and therefor will lack the experience of their competitors such as Costa (2020) and Starbucks (2020) who have been

established in the UK coffee market for some time now. Another weakness facing Brew & Co. is highlighted by Hobson (2015) who discusses economies of scale, simply put 'economy of scale' refers to the idea that the larger the quantity of an item purchased, the lower the cost of each individual item, due to the current size of Brew & Co. as an organisation there unit price will be more than that of their competitors, translating to less profit per sale.

3.2 EXTERNAL ANALYSIS

Johnson et al., (2017) discusses the external analysis to be the analysis of the external situation an organisation is in, with a focus on the external factors that are directly affecting the organisation. For the external analysis of Brew & Co. a PEST analysis will be used.

3.2.1 POLITICAL

Fifield (2010) refers to the political factors that effect an organisation to relate to the government, how it creates polices and legislations, regulations, and how legal and political systems control an organisation. Fifield (2010) continues that the political factors imposed on a business by the government are generally accepted as 'just how it is', that most changes to these factors happen gradually over a long period of time. Fifield (2010) highlights some political factors that will have an impact on an organisation such as Brew & Co. to include but not be limited to: the political stability over time, political attitudes towards subjects such as the enviroment, social responsibility, and customer protection, as well as legislative effects on employment, salaries and levels of pay, and profits (taxation).

Due to the limitations of this report not all these factors can be looked at in depth relative to Brew & Co., However salaries and pay in relation to minimum wage will be looked at as well as political stability in relation to Brexit.

GOV.UK (2020a) highlight the current rate of minimum wage, minimum wage is dependant of several factors including age and type of work however there is a clear set minimum wage for every type of

employee. Atkinson (2014) highlights how the national minimum wage can prove difficult for some small businesses particularly around the time of a rise, causing some businesses to suffer financially or not adhere to the legislation. Atkinson (2014) continues to identify ways in which businesses can cope with these legislations, by better understanding profit margins, making good hiring decisions, and investing in employees. Fifield (2010) highlights that legislations such as that of the national minimum wage are to be followed faultlessly within every organisation. GOV.UK (2020b) highlights the penalties for employers that do not adhere to this legislation, therefore it is imperative that Brew & Co take legislations such as the national minimum wage seriously.

Bloom et al., (2019) highlight how Brexit had begun to impact on businesses before the UK officially left the European union, that historical political events that have created uncertainty have followed the same trend, a rise in uncertainty that subsides reasonably quickly. However, Bloom et al., (2019) identify that Brexit has been different, there was a dramatic surge in uncertainty straight after the referendum in 2016 and since that uncertainty has lingered, with there being no clear deal on the table for what felt like a rather prolonged amount of time, businesses were somewhat left in the dark with what to expect. Bloom et al., (2019) continues that one of the reasons Brexit was such an uncertainty shock for the UK was that no one expected it, with the polls leading up to the referendum averaging at 30% for Brexit, the reality created a huge political shock instead of an economic one. Eddington (2020) highlights the importance of a balance between free trade deals and tariffs, while a country's economy can be boosted by free trade agreements, cheap imports can threaten its manufacturers. Eddington (2020) states that although there will be tariffs imposed on imports this is an important part of trade with other countries, allowing us to protect our own economy to a greater degree. The Fairtrade Foundation (2018) has highlighted its concern in relation to the import of coffee beans after Brexit, this is directly relatable to Brew & Co (2020) as their coffee beans are imported from Brazil, The Fairtrade Foundation (2018) highlight the importance of continuing to ensure fair trade partnerships despite potential tariffs, and not seeking less ethical cheaper alternatives elsewhere, view Appendix C for more details.

3.2.2 ECONOMIC

The Welsh Government's (2019) annually publish a report that compares the Welsh economic activity and labour market against the UK average; the report states that the South West Wales area which incorporates the Neath, and Swansea areas is not performing as well overall as the rest of the United Kingdom, view Appendix D for an overall view of the Welsh economy. The Welsh Government's (2019) report states that the rate of employment in the Neath and Swansea area is lower than both the Welsh and UK averages, and therefore the rate of unemployment is higher than that of the Welsh and UK averages. The report goes on to state how the GDHI (Gross Disposable Household Income) is lower than the Welsh and UK average in the Neath and Swansea area, artisan coffee is a luxury item and those with a higher disposable income are more likely to spend their money on luxury items. Brew & Co should consider the GDHI as well as the employment rate of an area and ensure it equals that of their target market before opening any further stores.

The World Health Organisation (2020) define Covid-19 as a type of coronavirus that causes pneumonia like respiratory symptoms, Covid-19 was declared a public health emergency on February 11th, 2020 and declared a pandemic on the March 11th 2020. HM Treasury (2020) highlight the impact that Covid-19 could have for the economy as well as individual businesses, while this is recognised and an attempt to fiercely combat any drastic negative impact that the pandemic might entail for the economy and small businesses is being made, it is widely recognised that the British economy could be a very different place on the other side of Covid-19.

Yorke (2020) emphasises how all non-essential shops have been forced to close, this prolonged closure could undoubtedly have negative effects on organisations such as Brew & Co which will be closed for the foreseeable future without a firm date to consider re-opening. Islam (2020) highlights the help available from the government to organisations such as Brew & Co. to be that of furlough pay for all employees, where the government will pay 80% of the employees' wages up to £2500 pound, which will take the pressure off Brew & Co. and allow them to remain in more of a frozen position financially,

as opposed to high outgoings on wages and no income. Islam (2020) also highlights the grants being made available to some businesses as well as 'brakes' and extensions on certain business rates and taxes. However due to the ongoing Covid-19 pandemic it is not possible to state the exact implications it will have for Brew & Co. at this time.

3.2.3 SOCIO-CULTURAL

Edwards (2020) highlights one of the socio-cultural issues facing a coffee shop such as Brew & Co. is that of the health conscious consumer, in the last decade there has been a significant shift towards healthy alternatives within the luxury food industry, using the examples of the introduction of alternative milks. Edwards (2020) continued that the introduction of these alternative milks not only kept the health conscious and vegan consumers happy, it also appealed to the upmarket appearance of the coffee shop that had chosen to introduce them. Fernandez (2010) identifies the socio-cultural influence of Fairtrade, highlighting the pressure on businesses dealing in coffee from Fairtrade organisations as well as its consumers to participate in Fairtrade. Fernandez (2010) highlights how participating in Fairtrade can improve an organisation's image and create a trustworthy brand using Starbucks' 2011 Fairtrade marketing campaign as an example of creating a win, win, win scenario for customer, supplier, and business.

3.2.4 TECHNOLOGICAL

MarketLine (2019) identify one of the most important technological factors effecting any organisation within the food and or beverage industry is that of genetically engineered crops, that the genetic engineering of crops can change or enhance the taste, shelf life, and more of a product. However, MarketLine (2019) highlights that the topic of genetic engineering does not come without controversy and that the potential damage to developing countries environmentally and economically is yet to be fully scoped. MarketLine (2019) continue that it is the responsibility of the organisation to ensure that their products remain ethically sourced despite the use of genetic engineering, as there is a great

amount of pressure on farmers in developing countries to increase productivity through the use of genetic engineering despite the potential consequences. The Economist (2020) highlights other technological factors to include the technology used within a coffee shop such as, coffee machines and cash registers, also identifying the innovative progress made towards the 'robot barista', stating that your average barista could be replaced entirely by a robot in the near future with the intention to create a more consistent cup of coffee

4. OBJECTIVES

Peter Drucker developed the SMART objectives model in 1954, Drucker's (1954) model states that for an organisation's objectives to be successfully met the objectives themselves will have to meet the Smart criteria, which is as follows: Specific, Measurable, Achievable, Relevant, and Time Specific. A broad objective has been created for Brew & Co., the objective is as follows: 'Grow Market Share'. This broad objective will be broken down into smaller objectives that will follow Drucker's SMART model. It is important to remember that it is necessary to allow appropriate time considerations due to the Covid-19 pandemic

4.1 GROW MARKET SHARE

Increase current market share in the UK by 400% by January 2027, to do this the following objectives will be used.

- Open the first additional store (store #2) in the south west wales area (Mumbles) by December 2022
- Open the second additional store (Store #3) in South West wales area (Swansea City Centre) by April 2024
- Open first additional store in England (store #4) in Bristol by December 2025
- Open second additional store in England (Store #5) in Oxford by December 2026

5. STRATEGY

With the strategic intent having been identified in section 4.0 this section will look at the strategic implementation that will allow for Brew & Co. to achieve the previously stated objectives.

5.1 MARKET SEGMENTATION

McDonald and Dunbar (2010) state that the market segmentation process is central to not only all marketing activities, but to all activities performed by a business, that it is essential to define market segments, understand the value required, understand the value positioning, and evaluate market/segment attractiveness and select. Smith (1956) first identified market segmentation as an alternative strategy to product differentiation, allowing for a select market to be targeted instead of creating differentiation within the pre existing product. Blythe (2014) has since outlined market segmentation in a comparable way, focusing on the importance to an organisation of having a 'market focus'. Brew & Co.'s Market can be separated into several segments however due to the limitations of this report only two will be discussed.

The first segment that will be looked at is regular coffee drinkers also known as coffee lovers, Kaffash (2012) highlights the disloyalty of this market segment, that this segment will get their 'coffee hit' wherever it is conveniently available to them, while they may hold a brand preference this will not outweigh the convenience element for them. Kaffash (2012) highlights how organisations such as Costa have tried to combat this issue by launching loyalty rewards programs for their customers.

The second segment that will be looked at is that of the individuals that live in households with a higher than (UK) average disposable income, Harfmann and Canning (2018) identify the link between a high disposable income and the purchase of more luxury goods such as takeaway coffee and cakes from coffee shops, that areas such as Bristol and Oxford with higher disposable incomes than that of the South West Wales area make for a better target market view Appendix E and F for details.

5.2 MARKET FOCUS

The market focus for Brew & Co. will be that of the individuals from an above average gross disposable income household, whilst trying to increase loyalty with the 'coffee lovers', however the focus will predominantly be that of high earners, with store locations being selected, with aesthetics to match this.

5.3 BREW & CO'S MESSAGE

Brew & Co.'s (2020) message will be similar to their current philosophy, that of creating a community within their stores that matches that of what is represented within the surrounding neighbourhood, while pushing the luxury branding and aesthetic to its target market.

5.4 COMPETITOR COMPARISON

There is undeniably an exceptional amount of established competition in the coffee shop market, with Starbucks (2020), Costa (2020), Coffee #1 (2020), and Pret (2020) just to name a few, Starbucks (2020) and Costa (2020) are appealing to the mainstream market with well-established stores and drive-thru's set up across the UK, offering pre processed often pre frozen food to the masses. While Pret (2020) and Coffee #1 (2020) are not quite so mainstream fast food although they are heading that way, while their food is mostly made fresh it is not made in house. Brew & Co. (2020) have something slightly different to offer with not only offering freshly ground and made coffee in store like their competitors they offer fresh food prepared instore, this is something that they will continue to provide to ensure they are appealing to the higher quality more luxury side of the market.

6. TACTICS

6.1 ENHANCE PRE-EXISTING LOYALTY CARDS

Brew & Co (2020) have an existing paper-based loyalty card programme, Brew & Co. will look to digitalise their loyalty cards into an app-based platform, such as what Stampme (2020) have to offer. What Stampme (2020) provide is an app-based loyalty card platform that allows organisations such as Brew & Co. to personalise to meet their specific needs. This type of platform would not only allow for Brew & Co to catch up to their competitors but also allow for them to begin gathering important information relating to their target market. Information such as but not limited to age, where they live, their habits, product matches etc. This will allow Brew & Co. at somewhat of a basic level to start tracking their customers purchase activity and trends.

6.2 SOCIAL MEDIA MARKETING

It would be advised that Brew & Co. continue to use social media as their main method of marketing, @Brewandcouk (2020a) have an active Instagram account with over 1000 followers, that number is growing quickly , this could be due to the regularity and quality of their content, all content is clear and user friendly, view Appendix B for some example content. It will be imperative that Brew & Co. take the initiative used for their Instagram platform and apply this when creating new social media platforms. It would be advised that Brew & Co. immediately create business accounts across all available social media platforms such as Facebook, twitter, and TikTok. With the intention to specifically target posts at individuals that fit within their target market, with potential to target customers that live in areas that Brew & Co. have interest in establishing stores.

7. ACTIONS

7.1 EMPLOY SOCIAL MEDIA ASSISTANT

Hemann and Burbary (2013) highlight the importance of a consistent and controlled brand image, that it is possible to create a brand image through the use of marketing content, this content has the ability to build both brand reputation and brand association. Therefore one initiative that would be crucial to Brew & Co.'s success is to employ an experienced individual to improve and maintain their social media platforms, the marketing taking place on social media will then become the focus of an individual 'marketing assistant' creating consistent content. Poquette (2018) highlights the benefit of investing in a marketing assistant to create consistency, in type and frequency of posts, whereas when the business tries to digitally market themselves as things get busier the quality and frequency of content can decrease.

7.2 OUTSOURCE LOYALTY APP

Vizard (2015) highlights the success that John Lewis had when creating their loyalty scheme, this was fundamentally down to the clear goal they set out to achieve and the 'test, test, test' approach that they took during the development period. Brew & Co. should take inspiration from John Lewis's development process of their loyalty scheme by speaking to their existing loyal customers, to find out what it is that they would like to gain out of a loyalty app, as well as those semi-frequent customers to see if there is anything an app could offer that would get them through the door more regularly. This will in turn allow for Brew & Co. to have a clear path to follow in creating their loyalty app, knowing what customers would like to see. The creation of the loyalty app will have to be outsourced.

7.3 TRAINING

Buckley and Caple (2009) highlight the sequential training process, that it is important to train employees in a level by level approach for maximum benefit, this can be applied to role specific training. Brew & Co. should look at implementing role specific training for their employees, roles including but not limited to: Barista, cashier, waiter/waitress, and back of house should become

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specialists in their individual role, this will help create consistency across the brand. Another consideration for brew and co is the employment of new staff, this should be done within adequate time for new store openings.

8. CONTROL

The control measures that will be put in place should be ongoing and consistent across stores, these have been broken down to more manageable headings.

8.1 MONTHLY

There will be daily, weekly, and monthly sales targets which KPI's should be identified for, Brew & Co. should strive to meet these. It is important that these targets are measured right down to the day to day sales and profits, this will stop an unexpected drop in sales during a monthly review. Fortnightly whole store, and managerial meetings will be held to discuss issues such as: sales, store performance, store cleanliness, and staff attitudes. There will also be monthly meetings put in place between the business owners and the marketing assistant, these meetings will look at the performance of the social media platforms as well as other marketing content, the marketing assistant will have pre prepared data that shows if and how there work has benefited the business as a whole in relation to sales.

8.2 QUARTERLY

Quarterly meetings should be held between members of the management from each store, to collect data on how each store is progressing, as well as discuss data collected in relation to the development of Brew & Co.'s loyalty app, this data can then be fed back to the app developers. Targets for the following Quarter can be created for each store, as well as discussion on how to improve stores that may not be performing as well as others, these meetings will give the opportunity for concerns to be passed directly up the chain to the business owners on a face to face level.

8.3 ANNUALLY

Annual meetings will reiterate the quarterly meetings, briefly overviewing information gathered previously and ensuring all issues have been rectified. Annual meetings will also discuss brew & Co's next step and ensuring that they have met their objectives for the previous year as well as discussing the strategy that needs to be implemented to meet the following years objective.

9. CONCLUSION

It can be concluded that Brew & Co. have strong internal situation, however the external situation is more complicated, with the exception of the Covid-19 pandemic's potential economic impacts Brew & Co. are in a strong situation externally, in time the Covid-19 implications will become apparent for organisations such as Brew & Co.

The overarching objective for Brew & Co. is to Grow their market share, this objective was broken down into multiple smaller more manageable SMART objectives. It was imperative when trying to reach the objectives set to create a clear strategy, a strategy that had a clear target market in mind, this market was defined as individuals living within high disposable income households. It is important that Brew & Co. keep up with the fast-moving competition, to do this Brew & Co. will introduce a loyalty scheme, this will be made available on an app-based platform, it was also deemed imperative that Brew & Co. expand their social media marketing reach by employing a marketing assistant.

The need for clear control when attempting to reach the set objectives became clear, to ensure Brew & Co. are on track to successfully meet their objectives fortnightly, monthly, quarterly and annual meetings will be held, this will ensure that nothing 'slips between the cracks'. Due to the limitations of this report not all aspects of the situational analysis could be conducted which had an impact on the accuracy of the outline marketing plan, future reports should look at both the Socio-cultural and technological factors in more depth as well as expand on sections 5.0, 6.0, and 7.0.

10. RECOMMENDATIONS

The Following three recommendations have been made:

10.1 RECOMMENDATION 1

It is recommended that Brew & Co. take all necessary considerations relating to the Covid-19 pandemic before attempting to expand, ensuring that they are in a stable financial position, as well as ensuring the economy and coffee industry as a whole are both in more stable position.

10.2 RECOMMENDATION 2

It is recommended that Brew & Co. look to expand in order to 'Grow their market share', by looking to open four additional stores across the UK, this should be done in stages ensuring that the business is in a financially stable and viable position to continue expansion. It is essential to create interest, that Brew & Co grow their social media reach by employing a designated marketing assistant to help with all marketing activities, however predominantly that of the social media accounts.

10.3 RECOMMENDATION 3

It is recommended that Brew & Co. look to create a personalised loyalty programme, this programme should be app- based; Brew & Co. have a good opportunity to conduct market research and identify what it is that their customers want from a loyalty app, to identify anything that would be particularly beneficial to Brew & Co.. The opportunity for this crucial market research should not be taken lightly as it could prove key to Brew & Co.'s eventual success.

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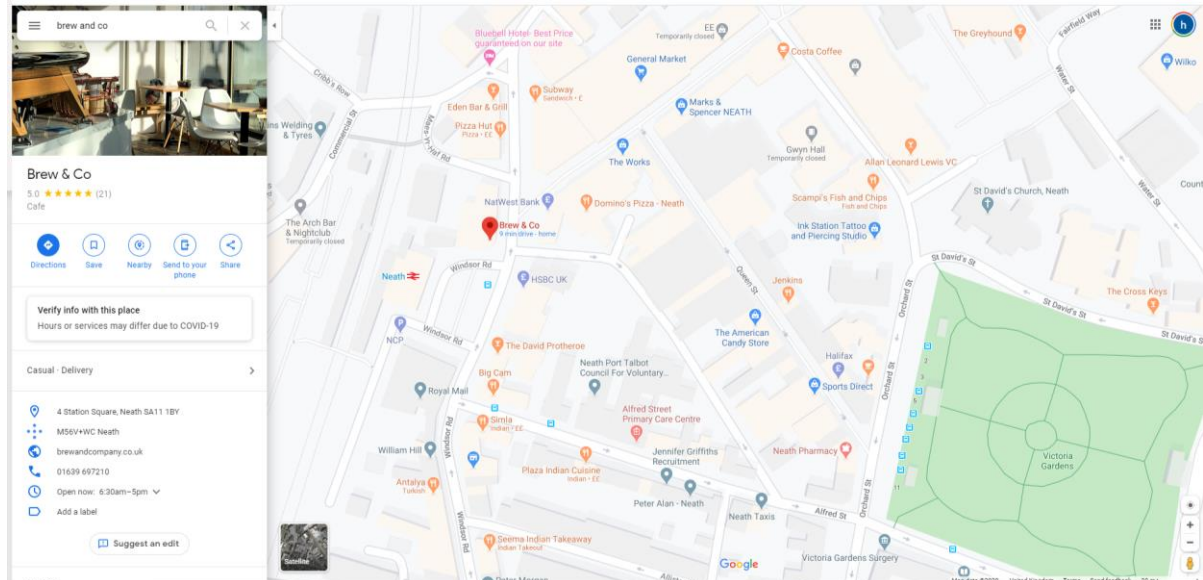
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12. APPENDICES

Appendix A



Appendix B



Appendix C



Delivering a fairtrade brexit?
A Fairtrade Foundation briefing paper
September 2018

The Brexit negotiations are now in a crucial phase, with a Withdrawal Agreement due this autumn, setting out the terms by which the UK will leave the European Union.

Key issues remain unresolved in the negotiations, and the climate of uncertainty which now dominates, including talk of a 'no-deal' scenario, is extremely concerning for all involved in global trade. A 'cliff-edge' in 2019, with no deal and no transition period, would not only impact on UK businesses, but could also impact negatively on developing country exporters who depend on trade with the UK for their livelihoods.

How does Fairtrade work and why are we bothered by Brexit?

Fairtrade exists to get a better deal for producers and workers in developing countries. Globally, there are 1.6bn Fairtrade producers in 73 countries, and the UK is one of the most developed consumer markets. In 2016, the retail value of Fairtrade products in the UK was \$1.5bn and in 2017, we saw growth of 7 percent thanks to new commitments in categories like flowers and wine.

Fairtrade-certified organisations are rigorously audited against a set of regularly reviewed standards to ensure decent conditions in relation to labour rights and environmental protection. Those standards require the payment of the Fairtrade Premium, owned by the farmers and workers themselves, and in some cases, the Fairtrade Minimum Price, which protects producers from harmful market fluctuations.

Fairtrade is a voluntary scheme which includes certification but also goes beyond that to develop programmes of support for producers and workers – for example, in women's leadership and climate change adaptation – and to develop advocacy strategies with others to address systemic challenges such as child labour and low wages.

This briefing paper builds on the Fairtrade Foundation's 2017 report¹ which made the case for protecting developing country market access to the UK through the Brexit process. In this paper, we explore outstanding issues from a Fairtrade perspective, taking a deeper look at Fairtrade supply chains, and consider the implications for different products including bananas, sugar and coffee. We seek to apply a 'trade for development' lens, reflecting on the contribution of these sectors to developing country economies, and more broadly, the Sustainable Development Goals (SDGs).

In our experience, increasing the cost of trade with developing countries (through tariffs, the imposition of other barriers, or UK currency devaluation) could lead to:

- Companies switching their sourcing arrangements, ending long-term relationships with suppliers.
- The burden of increased tariffs and other costs being pushed down onto producers and workers (i.e. lower purchasing prices, lower wages).
- Currency devaluation hitting Fairtrade companies importing from developing countries.
- Companies stepping back from Fairtrade commitments resulting in smaller volumes being bought on Fairtrade terms, less Fairtrade leverage on issues such as living wages, and less investment in programmes.

Joab Gideon, Langonot Horticulture:

"We rely on the UK market, we just have a few buyers in Germany and people don't buy flowers in Kenya, so a large percentage of our exports depend on [the] UK. If Brexit meant we lost this then we'll be suffering a lot."

¹Sheet: Let's Change Trade for Good: Fairtrade Foundation (2017). <https://www.fairtrade.org.uk/media/FairtradeUKLeaflet2017.pdf>
Documents/2018/FairtradeFoundationSheet: Let'sChangeTradeForGood.pdf



2/ your Fairtrade cup of coffee

– Most coffee-exporting developing countries do already qualify for duty-free access, including in the export of roasted coffee. By virtue of existing Economic Partnership Agreements (EPAs) and Free Trade Agreements (FTAs) with the EU, or as a result of their status as a Least-Developed Country (LDC) and qualification for 'Everything But Arms' (EBA).¹ Existing tariffs are set out on the next page.

• The coffee journey: There are a number of stages to the coffee journey which means that the supply chain is more complex than that of bananas. Traditionally, Fairtrade certified coffee farmers have focused on the production of green beans – the harvesting, sorting, processing and drying of cherries. Increasingly, farmers are able to invest in equipment (such as a hulling machine) and are receiving training in grading – activities which can add value to the initial cultivation. This coffee will then be prepared for export and roasting, which often takes place on a large scale in countries like Germany and the Netherlands, although there are specialist roasters in the UK. There is a lot of interest in opportunities for roasting to take place in the country of origin so that producer countries can retain a greater proportion of the value of the finished product. However, this will require a more developed domestic market for coffee and/or improvements in the storage (such as vacuum packaging) of roasted coffee for export to avoid its degradation in transit, and rules of origin to support this. The Fairtrade movement is currently supporting a new brand of coffee – Zavaid – which has been developed by women-led co-operatives and roasted in Kenya for the domestic market.

• Tariffs: During the debates on Brexit, reducing EU tariffs on roasted coffee has been regularly cited as a pro-development reason for the UK to leave the EU. In reality, tariffs on developing country coffee exporters are largely zero and it is primarily other factors that stand in the way of value addition in the sector.



¹Please note the clarification on the Cap XI article by the UK Government June 2018: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/700000/uk-trade-as-europe-a-trade-help/everything-arms

Country and Arrangement	EU Tariff – Green Coffee	EU Tariff – Roasted Coffee
Ethiopia, Uganda, Tanzania: Least-Developed Country (LDC) qualifying for EU Everything But Arms (EBA)	0%	0%
Peru, Colombia: EU Andean Pact FTA	0%	0%
Honduras, Guatemala, Nicaragua, Costa Rica: EU-Central America FTA	0%	0%
Mexico, existing EU-Mexico Global Agreement (currently being updated)	0%	0%
Bolivia, qualifies for EU GSP+	0%	0%
Indonesia, qualifies for EU GSP	0%	2.6%
Brazil, EU MFN tariff	0%	7.5%

– A 'no-deal' scenario risks increasing the import duty on roasted coffee from countries like Peru and Colombia with existing EU deals. The only other alternative would be to include roasted coffee and these countries within a revised UK GSP but the government has not yet proposed any immediate changes to unilateral preferences. 'No deal' would also disrupt coffee supply chains across Europe. Without agreement on rules of origin, including with third countries, the MFN tariff would apply on roasted coffee products crossing the UK-EU border, increasing the cost of business for Fairtrade licensees.

– There could be some development gains from renegotiation of the EPAs to improve the 'rules of origin'. A managed Brexit process, with a Withdrawal Agreement in place and an associated transition period, may create an opportunity for a reassessment of the problematic Economic Partnership Agreements (EPAs), with a view to relaxing the rules of origin requirements to allow full regional cumulation, for example, from East Africa. This could facilitate the further development of coffee roasting facilities in the global South.

• Non-tariff issues: As with bananas, shared standards (for example, restrictions on pesticides and contaminants, rules on 'organic' production and labeling) facilitates frictionless trade across Europe. Any post-Brexit divergence in standards between the UK and the EU could be disruptive for the supply chain. The European Commission has prepared a note on the UK's withdrawal from the EU and consequences for EU Food Law should the UK become a 'third country'.²

²https://ec.europa.eu/agriculture/sites/agriculture/files/docs/note_uk_exit_eu_food_law.pdf

Appendix D

Key indicators for the Welsh regions, Wales and the UK

	North Wales	South East Wales	Mid and South West Wales	Mid and South West		Wales	UK
				Mid Wales	South West Wales		
Employment rate ⁽¹⁾	75.4%	73.4%	71.0%	73.7%	70.2%	73.1%	75.2%
Unemployment rate ⁽²⁾	4.0%	4.8%	4.2%	2.2%	4.8%	4.5%	4.1%
Economic inactivity rate ⁽³⁾	18.0%	19.3%	21.4%	18.5%	22.2%	19.6%	17.5%
GVA per head ⁽⁴⁾	£20,753	£20,863	£17,616	£17,637	£17,610	£19,899	£27,298
GDHI per head ⁽⁵⁾	£16,447	£15,603	£15,493	£16,578	£15,336	£15,754	£19,514
Average earnings ⁽⁶⁾	£498.80	£520.00	£501.90	£478.40	£508.70	£509.00	£569.00
Change on year ⁽⁷⁾:							
Employment rate ⁽¹⁾	0.0	1.0	-0.4	-2.5	0.1	0.4	0.4
Unemployment rate ⁽²⁾	0.4	-0.8	-0.2	-0.9	0.1	-0.4	-0.2
Economic inactivity rate ⁽³⁾	-0.3	-0.6	0.8	2.2	0.4	-0.1	-0.2
GVA per head ⁽⁴⁾	4.4	2.8	1.2	-1.2	1.9	2.7	2.9
GDHI per head ⁽⁵⁾	0.9	1.1	0.9	1.5	0.8	1.0	1.0
Average earnings ⁽⁶⁾	3.8	2.5	3.3	2.3	1.8	2.1	3.5
Change on 1999/2001 ⁽⁷⁾:							
Employment rate ⁽¹⁾	5.8	6.8	4.9	3.1	5.6	6.0	3.0
Unemployment rate ⁽²⁾	-0.4	-0.9	-1.6	-2.2	-1.5	-0.9	-0.9
Economic inactivity rate ⁽³⁾	-6.6	-7.6	-5.4	-2.3	-6.4	-6.7	-3.9
GVA per head ⁽⁴⁾	80.2	72.5	71.8	66.0	73.7	74.1	76.1
GDHI per head ⁽⁵⁾	61.1	58.6	57.6	68.8	56.0	58.8	68.9
Average earnings ⁽⁶⁾	-	-	-	-	-	-	-

(1) Rates are for those aged 16-64. Data relate to the year to March 2019 with comparisons over the latest year and 2001.

(2) Rates are for those aged 16 and over using the International Labour Organisation's (ILO) definition of unemployment and are proportions of the economically active. Data relate to the year to March 2019 with comparisons over the latest year and 2001.

(3) Rates exclude students and are for those aged 16-64. Data relate to the year to March 2019 with comparisons over the latest year and 2001.

(4) Data relate to 2017 and are provisional. Comparisons are over the latest year and 1999.

(5) Data relate to 2017 and are provisional. Comparisons are over the latest year and 1999.

(6) Average (median) gross weekly earnings. Data relate to 2018 and are provisional. Comparisons are over the latest year. Comparisons to 1999 are not available.

(7) Percentage point change for employment, ILO unemployment and economic inactivity rates. Percentage change for GVA per head, GDHI per head and average earnings.

The [key quality information](#) section includes a link to a data sources guide which gives information on the methodology, quality and metadata for the sources used in this output.

Please note the 'next update' dates given throughout this bulletin relate to when new data for the dataset are next being released. The StatsWales datasets will be updated at that time and can be accessed via the links given at the end of this bulletin.

Appendix E

Economy & employment¹¹³

Economy

Bristol is one of the most successful cities in the UK, with a higher employment rate than other Core Cities. However, Bristol's prosperity is not shared by all its citizens and many areas experience multiple deprivation.

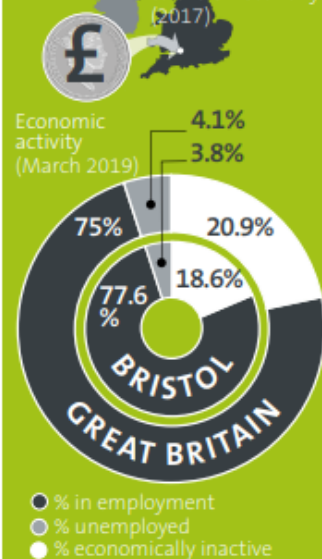
- Bristol contributed £14.20bn (inflation adjusted - 2016 £s) to the **UK economy** (Gross Value Added, GVA) in 2017 - up from £14.05bn in 2016)¹¹⁴.
- The West of England Local Economic Partnership (WoE LEP) area has the highest annual inflation adjusted **GVA growth** rate of the core city LEP areas¹¹⁵ (1998-2017 at 2.4% per year) and has remained the most productive (GVA per head) throughout this period. However, between 2015 and 2017 the economy of the WoE LEP grew more slowly than any of the other core city LEP areas¹¹⁶.
- Amongst the British Core Cities, Bristol has the second highest number of **business start-ups** (81.7 per 10,000 working age population in 2017) and the second highest average (89.1) between 2013-2017¹¹⁷. Between 2016 and 2017 the number of start-ups fell by 12.2% from 2,920 to 2,565.
- There are 22,170 **business units** in Bristol (VAT / PAYE registered, 2018), up from 20,615 in 2015¹¹⁸ but not significantly different from 22,175 in 2017.

Employment

- In 2018 there were over a quarter of a million (268,000) employee jobs in Bristol, up from 258,000 in 2016. Between 2016 and 2018 the number of employee jobs in Bristol grew by 3.9%. Amongst the British Core Cities only Leeds (7.9%) and Manchester (4.8%) grew more quickly¹¹⁹.
- 247,100 working age residents were in **employment** in March 2019. This is equivalent to an employment rate of 77.6% which is the highest of British Core Cities and 2.2 percentage points above the national (GB) average¹²⁰.
- 9,900 working age residents were **unemployed** in March 2019, a rate of 3.8% which is below the national (GB: 4.1%) average and lowest of the British Core Cities.¹²¹
- The "**Claimant Count**" for Bristol in August 2019 included 1,425 young people (18-24 years) and 1,880 older (aged 50+) people. Thus young people and older people accounted for 17.6% and 23.3% of claimants respectively¹²².
- In 2018 **average earnings** were £28,000 a year in Bristol, and £29,800 in the UK¹²³.
- In 2018 the **Low Carbon Environmental Goods and Services (LCEGS)** sector supported about 14,000 employee jobs in Bristol and about 37,000 in the West of England¹²⁴.

Key facts: Economy & employment

Bristol GVA contributes
£14.2bn
to the UK economy (2017)



Employee jobs in WoE (2017)

29,000 jobs in Aerospace & Advanced Engineering
20,000 jobs in Creative and Digital industries
22,000 jobs in High Tech
26,000 jobs in Digital Technology
26,000 jobs in Environmental Technologies

22,170

VAT/PAYE registered business units in Bristol
2018

Average earnings (2018)



Appendix F

Labour Supply

Employment and unemployment (Oct 2018-Sep 2019)

	Oxford (Numbers)	Oxford (%)	South East (%)	Great Britain (%)
All People				
Economically Active†	89,600	82.3	81.9	78.9
In Employment†	88,000	80.9	79.3	75.7
Employees†	73,900	69.4	66.9	64.7
Self Employed†	14,100	11.4	12.1	10.8
Unemployed (Model-Based)§	2,800	3.1	3.1	3.9
Males				
Economically Active†	47,300	81.7	85.8	83.5
In Employment†	46,500	80.2	83.0	79.9
Employees†	37,600	67.5	67.6	65.4
Self Employed†	8,800	12.7	15.2	14.3
Unemployed§	!	!	3.1	4.1
Females				
Economically Active†	42,200	83.0	78.1	74.4
In Employment†	41,600	81.6	75.6	71.5
Employees†	36,300	71.6	66.2	63.9
Self Employed†	5,300	10.0	9.1	7.3
Unemployed§	!	!	3.1	3.8

Source: ONS annual population survey

! Estimate is not available since sample size is disclosive ([see definitions](#))

† - numbers are for those aged 16 and over, % are for those aged 16-64

§ - numbers and % are for those aged 16 and over. % is a proportion of economically active

[view time-series](#)
[compare other areas](#)
[query dataset...](#)

Economic inactivity (Oct 2018-Sep 2019)

	Oxford (Level)	Oxford (%)	South East (%)	Great Britain (%)
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Appendix G

