



Yorkshire Hemp Supply Chain Project 2020/01



Promar International
response to:



The Supply
Chain Network

GROW
YORKSHIRE
CULTIVATING ENTERPRISE

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Private and confidential

Table of contents

- SECTION 1. INTRODUCTION 1
 - 1.1 Preamble 1
 - 1.2 Promar International – Who Are We? 1
 - The Sustainability Team 1
 - 1.1 Our Bid 3
- SECTION 2. BACKGROUND 4
 - 2.1 The UK and Global Hemp Sector 4
- SECTION 2. METHODOLOGY 5
 - 2.2 Start Up 5
 - 2.3 Desk Research 6
 - 2.4 Interviews 7
 - 2.5 Analysis, Supply Chain Map and Reporting 9
 - 2.5.1 Supply Chain Map 9
 - 2.5.2 Reporting 10
 - 2.6 Presentation of Findings 11
 - 2.7 Additional Extras 12
- SECTION 3. PROJECT STAFFING, TIMING & COSTS 13
 - 3.1 Project Staffing 13
 - Emma Gough 14
 - Luke Briggs 15
 - Harriet Thompson 16
 - 3.2 Timing 17
 - 3.3 Costs 18
- SECTION 4. RELEVANT EXPERIENCE 19
 - 4.1 Our Main Services 19
 - 4.2 Relevant Experience 19
 - Welsh Government Supply Chain Mapping 19
 - Defra 20

Section 1. Introduction

1.1 Preamble

Promar International (Promar) is pleased to submit a bid in response to The Supply Chain Network and Grow Yorkshire's tender to procure a consultant, to provide an insight into the supply chain opportunities to develop the processing of hemp in the Yorkshire region.

1.2 Promar International – Who Are We?

Promar International are a leading firm of agricultural, food and drink industry market researchers and strategic consultants.

Whilst we are based in the UK, we operate on an international basis. In the last two and half years we have worked in some 41 different countries around the world.

We are owned by Genus plc – a leading agri food company with offices in some 30 countries outside the UK and distribution partners in another 40. More details can be found at www.genusplc.com

We undertake project work for a wide range of clients across the food and drink sector, and across the world in countries such as the US, Canada, Chile, South Africa, Peru, New Zealand, Australia, across the rest of Europe and then closer to home in Scotland, Wales and Northern Ireland.

Our project work often includes a combination of both B2B - both qualitative and quantitative - research in its nature. It invariably also includes detailed desk research and analysis, as well as the planning of mid to long term strategies at both an industry wide and company level.

Considering our all-round experience, we feel we are in a good position to provide the support to The Supply Chain Network and Grow Yorkshire that this project needs and requires.

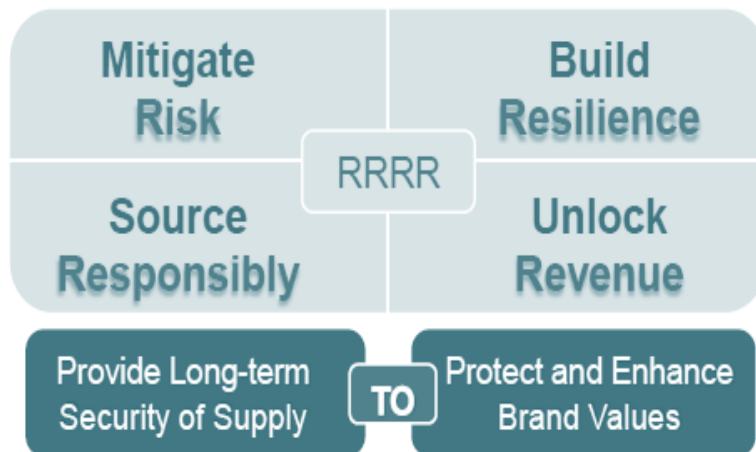
The Sustainability Team

Our team leads the integration of sustainability within the food and agriculture supply chain. We help clients drive **efficiency, profitability and resilience** whilst also helping to protect the **natural environment**, enhance brand values and improve **health and ethical well-being of communities**.

Sustainable Agriculture & Commodities



Our work covers the full supply chain with a focus on strategic planning in the area of food marketing and business development. We aim to provide services which help our clients build more sustainable businesses and supply chains. Our '4R's' model (below) provides the platform which we believe underpins sustainable food and agricultural supply chains. This guides our work across our business and client base.



We use robust data collection and analysis to inform our work and to measure and drive progress. We seek to be accountable for effecting change with our client businesses.

Additional information about Promar International and the work the Sustainability Team undertakes can be found on our website: <https://promar-international.com/>

1.1 Our Bid

This bid document has been prepared to provide:

- the background to Promar International - and our experience of working on similar projects
- the overall approach and methodology we will use for this assignment
- the team we will assign to carry out the work involved
- details of our costings and proposed timing
- the other administrative requirements for this bid as set out in the ITT

Nothing we have proposed in this document, at this stage is "set in stone". We would be more than happy to discuss this further and refine our proposal after further discussions with The Supply Chain Network and Grow Yorkshire prior to starting the project, if appropriate.

Section 2. Background

2.1 The UK and Global Hemp Sector

In 2019, the global industrial hemp market was valued in the region of £3.5 billion. Over half of the world's hemp is grown in China with sales the equivalent of £0.9 billion in 2018. China has a deep-rooted and efficient hemp supply chain, which has resulted in establishing a highly competitive hemp textile industry, renowned throughout the world. The country itself offers a number of best practices that are relevant to businesses all across the globe, including those within the UK, and more specifically Yorkshire.

A growing demand for hemp products within key sectors such as automotive, construction, food and beverage, biofuels, personal care and textile industries is set to increase the value of the global hemp market to £11.4 billion by 2027. Globally the four main uses of industrial hemp are: textiles, personal care, food and beverage and animal care. Together they account for c. 70% of total usage.

Most notably, the increased popularity of hemp has been driven by its sustainability benefits. The plant's ability to regain large volume of carbon is being effectively utilised in systems specifically designed to eliminate waste. One acre of hemp absorbs 25 times the amount of harmful carbon dioxide from our atmosphere than one acre of rainforest absorbs. In addition, the hemp works well in a crop rotation system and does not require herbicides, fungicides, or insecticides to grow.

Around 33,000 hectares of hemp is grown in Europe, with France the largest grower at around 8,000 hectares. The core sustainability perception of the crop is well received in the French market, particularly where it involves reducing transport miles and supporting local businesses. The 'Made in France' branding is well received both in France and internationally. This provides transferrable lessons for this project where the 'Made in Yorkshire' concept is a key feature in ensuring a stronger and more sustainable Yorkshire supply chain to help stop the erosion of British Industry.



Within the UK industry, cultivating industrial hemp is a growing trend with many benefits for growers. Hemp itself is a versatile crop and can grow in many different conditions. In an optimum environment hemp fibre can reach a yield of 7.5 tonnes per hectare. Industrial hemp also has a wide range of final uses which benefits it such as: paper, insulation, cooking oil, livestock bedding, clothes, hempcrete etc. This is helped further by accessible industrial hemp licences being available due to the low (less than 0.2%) tetrahydrocannabinol (THC) levels in fibres and seeds.

Although the UK market is small at present, there are strong indications that the sector is set to thrive. Recently it was announced that a £30 million hemp processing plant is to be built in the next 18 months in Leicestershire, Market Harborough. It will become the largest plant of its kind in the UK, with capacity to process around 25 tonnes of hemp a day.

Section 2. Methodology

The main stages of this project will be as follows:



2.2 Start Up

The start-up meeting will take place between Promar, The Supply Chain Network and Grow Yorkshire during the week commencing 4th January 2021. Due to the current situation, in regard to Covid-19, we would look to hold this meeting via an online platform such as Microsoft Teams or Skype.

The aim of the meeting will be to:

- enable the Promar project manager to introduce the key members of the Promar team who will be working on this assignment to The Supply Chain Network and Grow Yorkshire
- enhance our understanding of the project background and context beyond what we have already learnt from the briefing paper and any research carried out as part of this bid preparation
- review the methodology set out in this document and jointly agree upon the approach for the assignment
- re-confirm the scope, timings and deliverables of each phase of the project
- agree reporting protocols and lines of communication – we would expect to be in regular contact with The Supply Chain Network and Grow Yorkshire throughout the duration of the exercise

- allow The Supply Chain Network and Grow Yorkshire to share contact details with Promar of those people and organisations already identified (and contacted) as being part of the primary hemp supply chain in Yorkshire
- review any other relevant documents or information sources that The Supply Chain Network and Grow Yorkshire have access to
- confirm any other relevant project administration points

We will summarise the discussion into a short meeting note, which will include any required actions for ourselves or The Supply Chain Network and Grow Yorkshire. We will then brief our own project team in full on the requirements and process for the project.

2.3 Desk Research

We would carry out a brief but comprehensive period of desk research on this project.

One of the key outcomes of this project is the production of a detailed map of the Yorkshire hemp supply chain.

In order to utilise this map to its full potential and understand the opportunities that exist within the supply chain, we feel it is important to view it in context of the wider UK, EU and global market. As such our desk research at this stage would focus upon gaining an understanding of the size and structure of these markets.

We would look to use a number of reputable and reliable data sources such as: **Defra, Eurostat, FAO Stat and the United Nations Comtrade.**

From these data sources we would look to find:

- the overall volume and value of the global hemp market – and the UK's current position
- change in market size over the last five years and future forecasts
- the top three leading markets in the global hemp sector - and how the supply chains in these markets are creating best practice
- global hemp imports and exports both by volume and value – and the UK's position
- change in imports and exports over the last five years and future forecasts
- the top three leading global export markets and their key supply destinations

In addition, we would look to conduct desk research into the key environmental benefits of hemp and its associated products. This would include benefits such as (but not limited to):

- its ability to capture carbon – with particular reference to hempcrete which offsets a carbon intensive building material whilst also providing a long-term carbon store

- improving soil health
- whole plant usage – a sustainable raw material
- ability to grow without herbicides, pesticides and insecticides

2.4 Interviews

Whilst preparing for this tender, it was evident that detailed data on the UK hemp sector is not widely available, in comparison to other markets due to its relatively small size. The British Hemp Alliance detail that an estimated 810 hectares of hemp is under cultivation in the UK, in comparison with c. 33,000 hectares in Europe.

As such we consider that the best way to get up to date, relevant and accurate information for the UK, and particularly the region of Yorkshire, is to conduct a number of in-depth qualitative interviews with key stakeholders from the supply chain.

We propose to undertake 20 interviews, these would be spread across the supply chain, to include research organisations, growers, processors, and those selling final products. We would look to speak with those organisations already identified in the brief directly at this interview stage.

We would propose to undertake 20 interviews, this would include speaking with a range of stakeholders throughout the existing supply chain such as (but not limited to):

- **Growers**
 - East Yorkshire Hemp
 - Harrison Spinks
 - The Carbon Farm
- **Processors**
 - Tatham
 - SeFF Fibre Ltd
 - Yorkshire Hemp
- **Academia**
 - University of York – Bio Yorkshire
 - University of Leeds – Future Fashion Factory
- **Relevant Associations**
 - British Hemp Alliance

In addition, we would utilise our own network and expertise within the team to research and recruit further supply chain contacts to take part in these interviews.

Speaking with a wide range of stakeholders will ensure that we are able to gather data and information from across the whole supply chain. This will provide us with a complete understanding of the supply chain and will help to provide insight into specific opportunities for Yorkshire businesses in both the short term and long term.

We would look to gain a mixture of both qualitative and quantitative data from participants to gain an in depth understanding of the supply chain.

From experience we have found that interviews work best when they feel like conversations rather than interrogations. Prior to the interview stage we would develop a semi structured in-depth topic guide that would cover the main areas we looked to gather information on. The guide would be used by our experienced team members as a point of reference throughout the interview to ensure that all relevant areas are covered.

The topic guide would be discussed and shared with The Supply Chain Network and Grow Yorkshire for approval prior to interviews being conducted.

Due to the current situation related to Covid-19, we would look to hold these interviews over the phone or via an online platform such as Microsoft Teams or Skype, with them lasting around an hour each.

Business to Business (B2B) Research in a COVID - 19 Environment

The conventional thinking has nearly always been that these sort of B2B interviews are best undertaken on a face to face, in person, basis. The COVID – 19 situation has changed a good deal of this thinking.

At the time of preparing this bid, it is still not clear if it will be possible to meet on a face to face basis with key respondents to carry out discussions/ interviews etc - or even if it is possible, how receptive respondents might be to visitors. Based on current circumstances, it is probably unlikely that we might be able to do this sort of work on a face to face basis.

During the current pandemic, however, we have been using remote ways of carrying out these sorts of interviews all around the UK and internationally.

We have found no adverse impact on the quality of data/insights captured using this method, compared to a more conventional face to face interview/meeting/discussion.

2.5 Analysis, Supply Chain Map and Reporting

The final report will bring together the detailed data collated through both the desk research and B2B interviews. This qualitative and quantitative data will be analysed within a triple helix approach in order to:

1. Understand the current Yorkshire hemp end to end supply chain
2. Identify gaps and detail opportunities to make the current supply chain more effective and resilient through use of local SMEs
3. Provide opportunities for future improvements within the chain, across various channels such as: new technologies, improved visibility, investment opportunities, upskilling, and environmental efficiencies

2.5.1 Supply Chain Map

One of the key outcomes of the analysis will be the development of the detailed supply chain map. The map will provide:

- o clear detail on businesses/organisations associated with the supply chain such as researchers, growers, processors and those selling finished products
- o information on stakeholder requirements within the hemp industry at present and for the future
- o defined clusters identifying and enhancing the relationships and links between all those involved throughout the supply chain from primary suppliers to customers, both up and down the supply chain
- o quantifiable data on hemp production/processing capacities at each level of the supply chain
- o evidence of different channels within the supply chain as well as vertical sectors such as construction, food, textiles, automotive, etc
- o environmental benefits of the current supply chain and areas where efficiencies can be made

In addition, we would look to include case studies of situations of best practice. This would help provide clear evidence behind proposed opportunities and a visual focus of how the supply chain can develop effectively. As the UK has a relatively small hemp industry, these case studies may come from global sources, such as the European leader in the sector, France. Most notably we feel there is a clear connection between Yorkshire hemp and France in terms of the usage of the 'Made in Yorkshire/France' concept and branding.

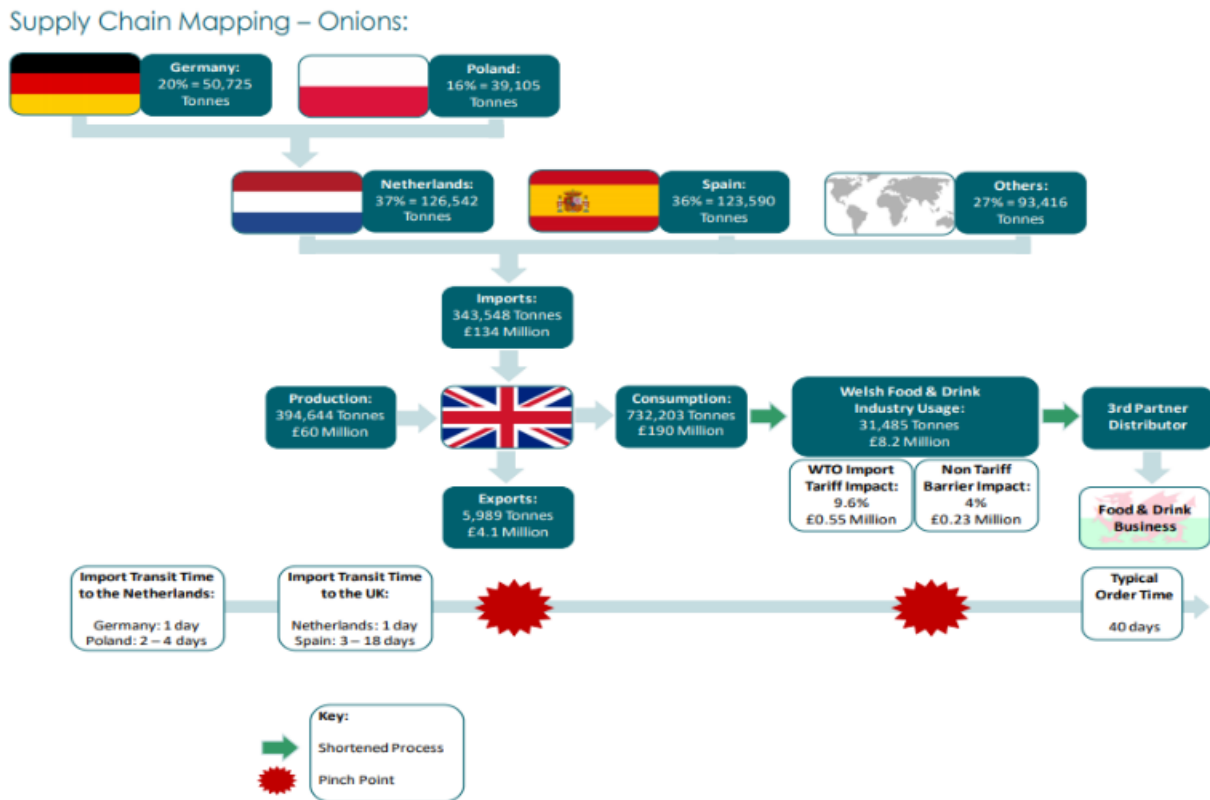
As per the brief, we are aware that the York and North Yorkshire Local Enterprise Partnership (Y&NY LEP) are undertaking a project that focuses on Bio based and Circular Construction in Yorkshire (BaCCY), which forms part of the overall Carbon Neutral Circular Economy strategy. There are set to be crossovers between this project and BaCCY and as such we will ensure that we keep in constant contact with the project manager to avoid duplication and ensure both projects are aligned.

The supply chain map will be able to identify gaps in the current supply chain, and what opportunities exist to help local SMEs develop and fulfil these.

Our infographic style supply chain maps are highly visual and easy to understand. Our team is able to use the latest mapping technologies to provide a clear and concise level of dissemination of key information and data with both The Supply Chain Network, Grow Yorkshire and future audiences.

Figure 2.1 below shows an example of a recent supply chain map we developed for the Welsh Government. The map details the impact of proposed Brexit tariffs on specific food and drink items that are utilised heavily within the Welsh food and drink manufacturing sector. Our triple helix approach enabled us to develop the map considering a range of internal and external factors and the implications these would have in a quantitative and qualitative form on Welsh food and drink businesses.

Figure 2.1: An example of our visual supply chain maps



2.5.2 Reporting

The supply chain map is the core focus of this project.

We envisage that alongside the supply chain map we will produce a Microsoft Word report that provides further detail and evidence of the areas included within the supply chain map. With focus on drawing out and detailing the distinct opportunities for growth and investment within the sector for Yorkshire SMEs.

The report will look to cover:

- An overview of the global hemp industry in terms of:
 - market size
 - import/export industry
 - future forecasts
 - key markets within the industry – detailed case studies with key learnings and action points for the Yorkshire supply chain
 - the UK's position within the sector
- Up to date visually representative supply chain map
- Evidence from the desk research and B2B interviews with researchers, growers, processors and those manufacturing finished products, to support the findings of the supply chain map
- A detailed SWOT analysis focused on identifying short- and long-term opportunities to strengthen the position of the Yorkshire hemp supply chain, through:
 - opportunities for local SMEs to supply/service the supply chain
 - opportunities to provide greater efficiencies along the supply chain by utilising local businesses
 - future opportunities within the supply chain in terms of use of new technologies; investment areas; skills; environmental policies; production advancements

Throughout the report we would look to include both quantitative and qualitative information to bring together the robustness and reliability of the research and findings.

2.6 Presentation of Findings

Our team has the skills and knowledge to develop specific infographics, alongside the supply chain map and final report, to ensure clear dissemination of the results of this project with The Supply Chain Network, Grow Yorkshire and any other stakeholders that are felt to be appropriate.

In addition, we would look to prepare an online call or webinar to present our findings back. We would look to make this an interactive session with those who are “online”. The webinar(s) could be recorded and used as a future resource for The Supply Chain Network and Grow Yorkshire and those stakeholders identified within the supply chain. It may also be a useful tool to disseminate information within the Made in Yorkshire knowledge hub, making other businesses in the area aware of potential opportunities.

Recently we developed an interactive webinar for the Agricultural and Horticultural Development Board (AHDB) that focused on detailing market opportunities in the UAE. The webinar was well received for using a range of interactive visual skills to showcase our findings in a clear and concise manner. In addition, we undertook a comprehensive question and answer session allowing the clients and other stakeholders to speak directly with us about the findings. We also developed an online podcast, based upon the webinar, with key findings and information for further dissemination.

We would look to bring any presentations "to life", this could involve the use of video clips to illustrate certain key points, the use of "vox pops" from key respondents to highlight some of the main conclusions derived from our work, use of infographics etc and other visually attractive material, etc.

In previous projects we have often used an online/webinar presentation as a 'token of appreciation' for those participating in the study through B2B interviews. Providing interviewees, the opportunity to hear the findings of the project they were involved with can often be a key 'hook' in gaining valuable interviewees.

This is of course would be at the discretion of The Supply Chain Network and Grow Yorkshire. If this went ahead, all content of the webinar would be discussed and approved with both organisations prior to the event.

We would, of course, be pleased to discuss any aspect of our proposed methodology with The Supply Chain Network and Grow Yorkshire as might be appropriate.

2.7 Additional Extras


We recognise that at the heart of this project are the Yorkshire businesses involved in the hemp supply chain. In the current climate we understand that developing tight and efficient supply chains provides a robust sector that can battle external developments such as Brexit or Covid-19 together.

Although falling outside the remit of this brief we feel it is important to provide those stakeholders with further, detailed, specific guidance related directly to their business and their place within the supply chain. As such we would be keen to offer a mentoring service, at an additional cost, to those within the supply chain. The mentoring would provide one to one guidance and support in producing a clear strategy to obtain and achieve some of the opportunities identified as part of this project.

We have undertaken mentoring previously with business in the food and drink sector in Wales. Working with a range of producers to develop business action plans and support trade development through setting up meetings with prospective buyers.

Section 3. Project Staffing, Timing & Costs

3.1 Project Staffing



This is not a team of individuals.

The specified team consists of internal Promar staff and associates who work together regularly to ensure efficient and timely completion of projects across a range of sectors, projects, and geographical areas.

The following provides details of the key experience for Promar team members for this project.

We have selected our team to reflect the range of disciplines that will be needed on a project of this nature.

The core team we have nominated have all been with the business for some time. If over the duration of the project, one of them becomes unavailable for any reason, they will be replaced on a "like for like" basis (i.e. a Senior Consultant will be replaced with another Senior Consultant etc). We would advise The Supply Chain Network and Grow Yorkshire of any planned changes to our team in advance.

A summary of the skills and experience we will bring to this assignment can be given as follows:



Our nominated team at this stage is therefore:

Emma Gough - is a Senior Consultant with Promar International who joined the company after graduating from Aberystwyth University with an MSc (Econ) in Management and Marketing in 2009.



During her time at Promar International, Emma has built up a wealth of knowledge and experience of working in a wide range of markets and sectors – including cereals, meat, dairy, pork, feed enzymes, fresh produce, seafood, alcoholic drinks, horticulture products and organic food and drinks.

B2B interviews are one of Emma's core focus areas. She has conducted numerous interviews over the years with stakeholders throughout supply chains, both in the UK and internationally and across a wide range of agri food sectors including cereals, dairy, beef, pork, fresh produce, organics, preserves, seafood, alcoholic drinks, and others. A recent project involved Emma identifying and contacting growers, manufacturers, retailers and foodservice operators in the US citrus supply chain and interviewing them to find and develop key opportunities for citrus growers and exporters in the southern hemisphere. The results of the research were compiled into a visual led report as well as being presented virtually to key southern hemisphere citrus growing associations.

Most recently Emma worked on a project that involved interviewing a range of SMEs in Wales to understand the impacts of Brexit on the individual businesses and the wider food and drink sector in Wales. The results of these interviews were developed into a set of detailed supply chain maps for specific food and drink products, that provided both a quantitative and qualitative overview of the individual supply chain. Within this project it was important that the results of the comprehensive research were able to be clearly understood by a range of audiences and hence the visually developed supply chain maps and accompanying report.

As well as strong primary and secondary research skills, Emma is also a confident presenter. A research-based project involved Emma interviewing key stakeholders in the Chinese berry sector to find gaps in the market and develop opportunities for South African berry exporters. Following the completion of the project Emma was asked to present the key findings at the Global Berry Congress in the Netherlands to an audience of over 500.

Emma will act as overall Project Director for this assignment and will oversee all stages of the programme of work.

Edwin Reyes is a motivated agronomist with a masters in agricultural economics, who joined the Promar Sustainability Team as a Consultant after working in hydroponics production and controlled environment agriculture for five years. Edwin was brought up in a small village in a rural community in Colombia where his passion for agriculture and agriculture enterprises began. Edwin has a keen interest in driving technological advancements in the agriculture sector, environmentally friendly production processes and sustainable farming.



Prior to joining Promar, Edwin was the Technical Manager at Orthios - a UK start up mainly focussed on the generation of green energy (the main aim of the company is to develop an Eco Park where part of the energy produced is used for the production of food using hydroponics systems). Here, he was responsible for the development of business plans for different agriculture products under different hydroponics systems, identifying agriculture products with commercial potential in the UK market and assessing economic and technical viability of crops to be produced under hydroponics systems. He also developed case studies on other production models to provide the executive team with recommendations of the most suitable hydroponics technologies and crops.

Edwin has been working on a number of assignments since joining the company and these include looking at opportunities in the UK, France, Germany and Ireland for New Zealand based agri tech products and services, assessing the UK market for South African produced dried fruit and the Middle Eastern markets for imported lamb and beef (as part of a feasibility study in Turkey for a new livestock production and processing project). He has also in the past worked on research projects on meat, dairy, cut flowers, fruits and vegetables and poultry markets.

Edwin will be involved in all aspects of the project, with particular focus on interviewing researchers, growers, processors and those manufacturing and selling final end products. He will also help to utilise this data into developing the robust supply chain maps and final presentation documents.

Luke Briggs is a dynamic and motivated environmental professional with a breadth of experience across the public, private and third sectors. Luke joined the Environment team at Promar International in March 2020. Luke's expertise includes sustainable agricultural practices, organisational sustainability strategies, interdisciplinary research projects, and stakeholder engagement. As an environmental sustainability specialist, Luke has a strong record of advising government organisations, higher education institutes and businesses throughout the supply chain.



During his time at Promar Luke has undertaken several projects focused on developing environmental efficiencies for specific agri-food supply chains. Most recently Luke worked on a project focused on the Brazilian melon sector. After undertaking detailed research, he was able to outline a number of key opportunities for melon production, accounting for environmental, social and economic factors. This informed the farming practices required to establish a successful and sustainable commercial melon production system and how this would fit into local and global supply chains.

As well as focusing on the environmental aspects of this project, Luke will also be conducting several of the one to one interviews. Earlier this year he worked on a project for a leading Peruvian fresh fruit exporter whose company ethos was focused on sustainability. Luke interviewed importers and retailers to help identify potential commercial opportunities in both the UK and EU supply chains.

Prior to working at Promar, Luke co-led research at the Centre for Evidence-based Agriculture to assess the existing evidence base on the environmental and socio-economic impacts of organic versus conventional agriculture, in a Scottish context. Following extensive research and synthesis, Luke communicated detailed research outcomes and coordinated workshops with Scottish organic farmers. Recommendations of the principle issues and strategies identified were provided to the Scottish Government in the context of policy, industry and research.

Luke will be involved in all stages of this project, with particular focus on providing clear and strategic environmental opportunities for the Yorkshire hemp supply chain.

Harriet Thompson has recently joined Promar International and graduated 4 years ago in journalism with a 2:1 degree from the University of Gloucestershire. She has subsequently worked for several PR and marketing agencies and has developed good skills in the design and content of web sites, the use of social media, etc.

At Promar, as Marketing Coordinator, Harriet has responsibility for the development and design content for agricultural and food trade press articles, internal publications and other media channels, the correct use of our brand guidelines and the presentation of internal and external reports in an imaginative, yet easy to understand format such as the better use of infographics, etc.

On this assignment, Harriet will be involved in ensuring that all data and insight presented to The Supply Chain Network and Grow Yorkshire, and its various stakeholders meets these requirements. She will also be designing the visual based infographics, supply chain maps, final report and associated presentations. She will also assist in the dissemination of any further information as might be required through the use of social media, webinars, pod casts, etc

Harriet will be supporting the team with branding and design requirements throughout this project.

Other staff from the Promar team can be assigned to the project as might be required over its duration.

3.2 Timing

We note the proposed end date for the completion of this study as set out in the brief is March 2021. The GANTT chart below details the key stages and timings of this project:

		WC 4th Jan 2021	WC 11th Jan 2021	WC 18th Jan 2021	WC 25th Jan 2021	WC 1st Feb 2021	WC 8th Feb 2021	WC 15th Feb 2021	WC 22nd Feb 2021	WC 1st Mar 2021	WC 8th Mar 2021
Start up											
	Project Management	█	█	█	█	█	█	█	█	█	█
	Inception Meeting	█									
	Fortnightly project updates			█		█		█		█	
Desk Research											
	Hemp industry data research		█								
Interviews											
	Develop topic guide and gain client approval		█								
	Interviews - 20			█	█	█					
Analysis, Supply Chain Map and Reporting											
	Interview data manipulation - graphs etc						█				
	Supply Chain Map development						█				
	Report development							█	█		
Presentation of Findings											
	Final presentation via Teams prep									█	
	Final presentation via Teams										█

3.3 Costs

Our costs for this study will be **£9,998 + VAT**

As mentioned in the methodology we would also propose providing additional one to one mentoring with specific Yorkshire hemp supply chain organisations. These would be charged at an extra cost of **£500 per day**

Our standard terms and conditions of working are as follows:

- we would expect to be able to invoice The Supply Chain Network and Grow Yorkshire 50% at the start of this project and 50% at the end
- submitted invoices are to be settled within 30 days
- in extreme cases, where invoices remain unpaid over extended periods of time, we reserve the right to charge clients interest at the prevailing rate set by the Bank of England and this is something we strictly enforce
- payment is to be made to our UK bank account
- we hold this financial quote, as it is for the next 60 days, after which we reserve the right to alter it as might be required/necessary

At this stage, we would be more than happy to discuss further the costing, timing, methodology and report deliverables with The Supply Chain Network and Grow Yorkshire.

Section 4. Relevant Experience

4.1 Our Main Services

The main consulting services we provide to clients cover the full value chain and include the following:



4.2 Relevant Experience

Detailed below are a number of projects that Promar have worked on recently which show the wide range of skills and expertise we have in this area:

Welsh Government Supply Chain Mapping



Promar undertook an extensive project for the Welsh Government whereby the core focus was to gain an in depth understanding of the potential monetary impacts of Brexit on the country's food and drink sector.

An initial assessment was devised by the team, designed to test how prepared each business was for Brexit and identify gaps and opportunities within the supply chain. 15 companies from across the sector were identified and undertook the in-depth assessment with members of the project team.

The assessment focused on factors and areas such as product specifications, sources of ingredients, supply chain operations, environmental impacts, identifying key ingredients and pinch points (areas of potential issues following Brexit), and the implication of tariff and non-tariff barriers.

The data from these assessments were analysed to create a list of key products that could potentially be disrupted by the introduction of Brexit. This data was then collated to produce a set of 16 individual, highly visual supply chain maps showing key areas of disruption and potential numerical costs involved if Brexit occurred. Supply chains covered included: onions, cheese, eggs, palm oil, frozen chips and peanuts.

The findings from the research were put into a final report presentation and included a number of clear strategies on how the industry could close gaps within the supply chain and focus on working together collaboratively to seek out new opportunities. A focus session was then run by Promar with key members of the Welsh Government team. It enabled us to clearly go through our process of arriving at our final figures and findings with the client, as well as encouraging active ways in which the Welsh Government Team could start to prepare their industry for Brexit and reduce the identified gaps.

Defra



On this assignment, we were commissioned by Defra to carry out analysis of the opportunities for the UK food and drink sectors post Brexit in the US, UAE and India.

The products covered in our work included the likes of seafood, alcoholic drinks, dairy products, alternative meats, biscuits, confectionery, bakery and snacks. This work was carried out in the late winter of 2019 - spring of 2020.

This included an extensive period of desk research before a programme of c. 25 interviews in each of the US, the UAE and India with leading importers, processors, trade associations, government agencies, etc.

We assessed the scale of the market opportunity for the UK and reputation of the UK food and drink sector in these 3 markets. We also assessed the competitive environment from suppliers in the local domestic market, from the EU, and then Oceania. This included assessing their sustainability credentials.

As part of our work, we developed an Action Plan covering the periods of 0/12 months, 1/3 years and 3/5 years plus and the role of Defra and other key industry stakeholders, as well as individual UK food processing companies.

We prepared a detailed report for our client and made a presentation of the key findings and recommendations to the senior management team at Defra at the end of our work.

This included online presentations to other key stakeholders to the project such as the Department of International Trade and the Food & Drink Federation Export Committee.

New Zealand Trade and Enterprise (NZTE)



Earlier this year we undertook a project for NZTE to assess a number of European markets for their livestock sectors and identify potential opportunities for New Zealand based suppliers of agri tech type products and services.

We undertook a short but intensive period of desk research on the main focus markets: the UK, France, Germany and Ireland. Six interviews were then conducted within each of the four markets across the livestock supply chain.

The findings from both sets of research were brought together in a final report detailing key action points to be undertaken in the short, medium and long term.

In addition to the report a series of webinars was held with New Zealand based exporters and other stakeholders in order to help update their knowledge on the sector and provide them with clear growth opportunities for the future.

Chilean Fresh Fruit Export Association (ASOEX)



The Chilean Blueberry Committee (CBC) and the Chilean Fresh Fruit Export Association (ASOEX) requested Promar International to carry out a study of 40 leading international blueberry markets based on imports.

The 40 markets were identified, and a large desk-based research and analysis was conducted of the markets, with particular reference to their optimisation towards blueberry exports.

A market prioritisation was carried out utilising all the data collected which resulted in a ranking of the top 40 countries in regard to their attractiveness as an export market to the Chilean blueberry exporters.

The results of the prioritisation were delivered in a visually pleasing way through a Microsoft PowerPoint report. In addition, an interactive presentation of findings was delivered back to CBC, ASOEX and their key stakeholders.

References available from previous clients on request.