

# White's



TIME-HONOURED OATS SINCE 1841

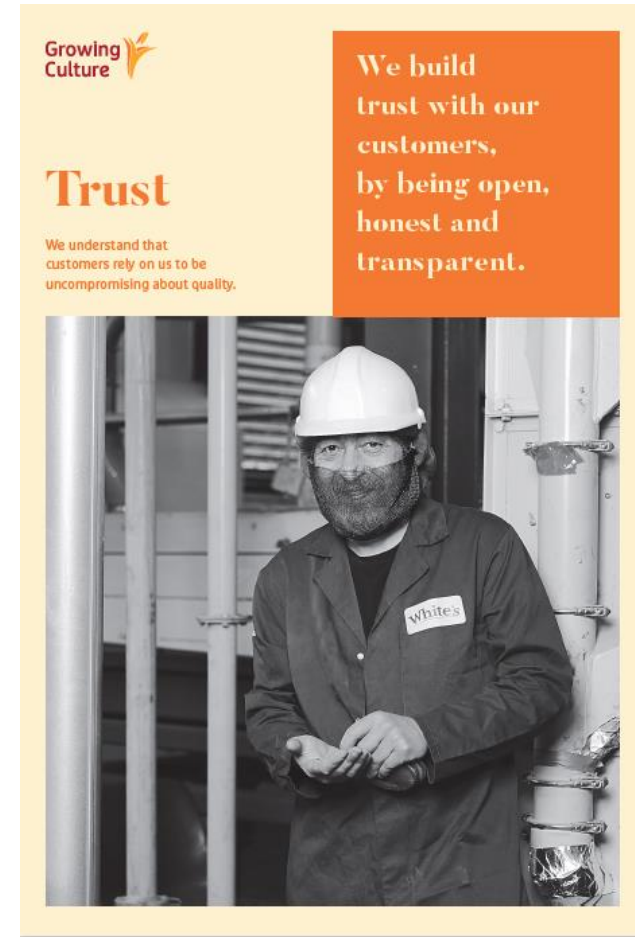
Welcome to White's Oats  
Tandragee, County Armagh

# Our Purpose:

“Unlocking the power of oats  
for a better world”

# About us

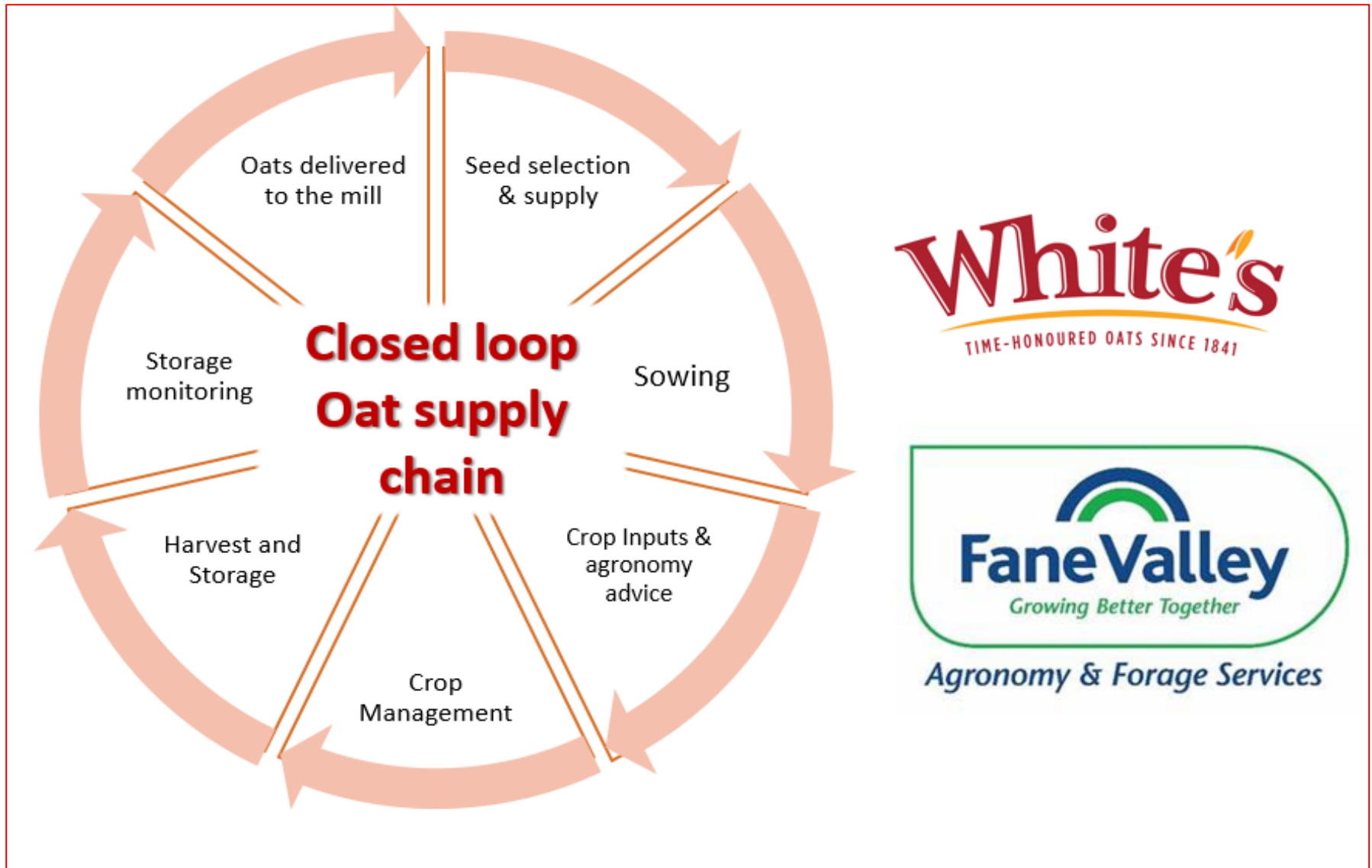
- White's founded in 1841
  - Celebrating over 181 years of milling
  - Largest oat miller in Ireland
  - Largest organic oat miller in UK & Ireland
  - Part of Fane Valley Group – cooperative of 1000 farmer shareholders
- Annual turnover of £22m/30,000 tonnes of oats
  - 66 employees
- Accreditations;
  - BRC Grade AA,
  - Soil Association - Organic
  - Nut Free Site
  - Sedex
  - Forest Stewardship Council Packaging (FSC)
  - Life-cycle Assessment - Mondra





# Building consumer trust

– developing a sustainable closed loop oat supply chain



# Our Grower Volume

- Standard Oat Growers NI – 20%
- Standard Oat Growers ROI – 45%
- Organic Oat Growers UK – 35%



# Winter Oats Planted in NI October 2022



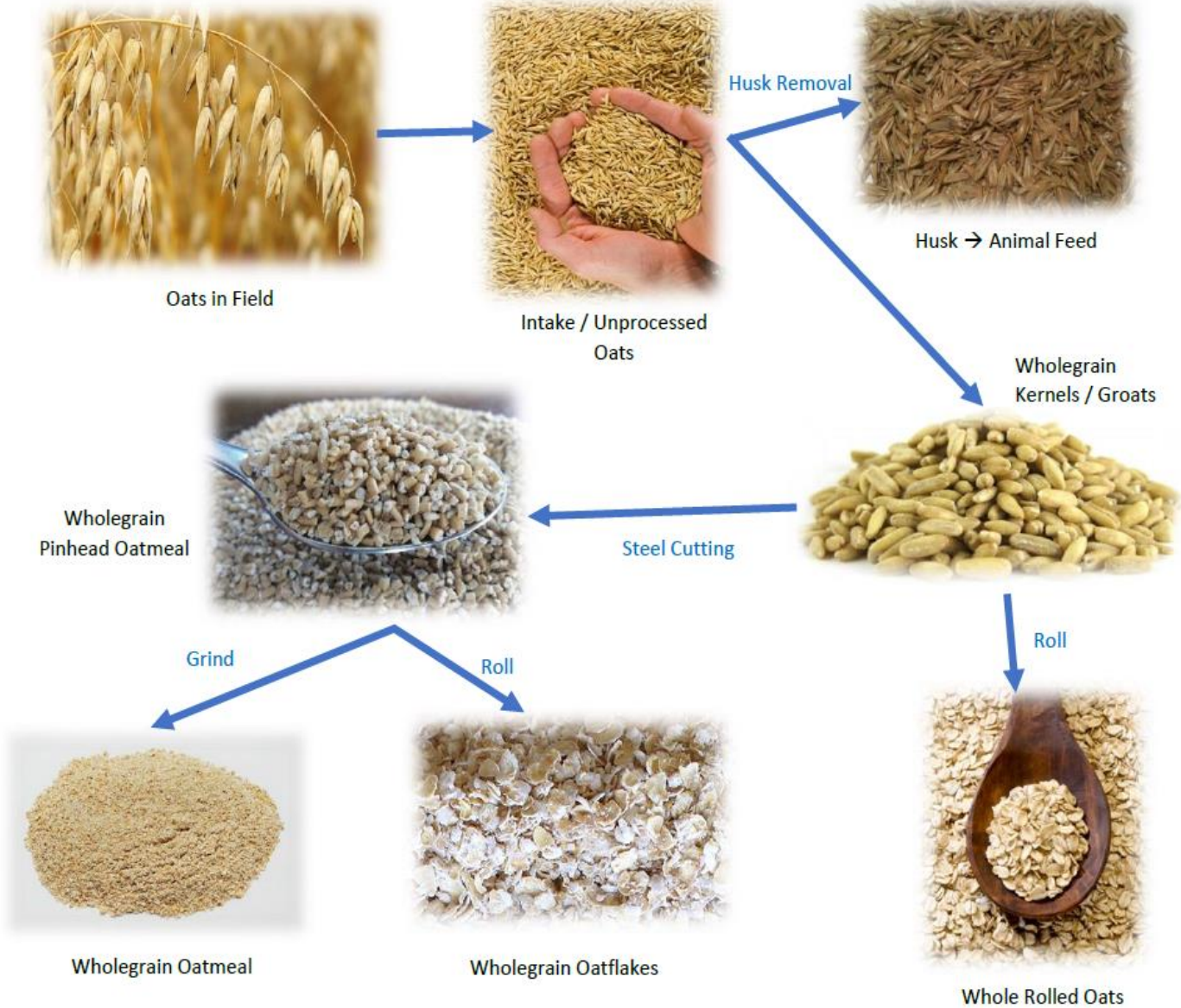
## World Oat Production

000 mt	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	18/19 vs 17/18	5 yr avg	5 Yr CARG	% of Total
RUSSIA	5,332	4,027	4,932	5,267	4,527	4,750	5,441	4,800	-11.8%	4,983	2.0%	22.6%
CANADA	3,158	2,830	3,928	2,977	3,425	3,231	3,733	3,278	-12.2%	3,459	-1.0%	15.7%
AUSTRALIA	1,262	1,121	1,255	1,198	1,299	2,266	1,119	1,048	-6.4%	1,427	-2.3%	6.5%
POLAND	1,349	1,434	1,158	1,421	1,198	1,318	1,434	1,225	-14.6%	1,306	4.4%	5.9%
FINLAND	1,045	1,073	1,198	1,039	978	1,035	997	867	-13.0%	1,050	-3.6%	4.8%
UNITED STATES	729	893	939	1,011	1,300	940	717	815	13.6%	981	-5.2%	4.5%
SPAIN	1,159	698	996	697	813	1,157	910	1,309	43.9%	915	-1.8%	4.1%
UNITED KINGDOM	613	627	964	820	799	816	875	832	-4.9%	855	-1.9%	3.9%
SWEDEN	692	731	852	665	744	771	674	398	-40.9%	741	-4.6%	3.4%
GERMANY	598	627	757	628	627	566	536	576	7.5%	623	-6.7%	2.8%
CHILE	451	679	611	421	534	714	670	621	-7.3%	590	1.9%	2.7%
ARGENTINA	345	496	445	525	553	785	492	600	22.0%	560	2.0%	2.5%
CHINA	740	633	600	500	445	446	437	428	-2.0%	485	-6.2%	2.2%
BRAZIL	354	361	380	307	351	828	634	770	21.5%	500	10.8%	2.3%
BELARUS	448	422	352	522	492	390	500	460	-8.0%	451	7.3%	2.0%
FRANCE	316	393	428	441	394	343	537	481	-10.3%	429	4.6%	1.9%
ROMANIA	376	338	374	381	348	382	408	278	-31.8%	378	1.8%	1.7%
NORWAY	231	232	224	283	286	330	300	300	0.0%	285	6.0%	1.3%
ITALY	263	293	269	247	262	267	253	267	5.8%	260	-1.3%	1.2%
DENMARK	206	268	267	183	207	275	319	256	-19.5%	250	3.6%	1.1%
IRELAND	161	148	184	143	189	174	194	122	-37.2%	177	1.0%	0.8%
LITHUANIA	129	164	165	184	164	155	196	211	7.6%	173	3.5%	0.8%
CYPRUS	164	172	139	152	155	132	142	163	14.6%	144	0.5%	0.7%
CZECH REPUBLIC	164	172	139	152	155	132	142	163	14.6%	144	0.5%	0.7%
LATVIA	121	137	134	155	161	146	134	199	48.3%	146	-0.0%	0.7%
HUNGARY	130	140	135	136	129	103	92	60	-34.1%	119	-7.5%	0.5%
AUSTRIA	110	94	87	106	96	94	76	78	2.4%	92	-2.6%	0.4%
GREECE	103	124	120	85	87	123	137	100	-27.4%	110	2.8%	0.5%
MEXICO	51	84	91	93	85	72	90	90	0.0%	86	-0.3%	0.4%
CROATIA	76	103	61	58	74	80	67	64	-4.3%	68	1.9%	0.3%
ESTONIA	63	79	85	65	68	64	90	91	1.8%	74	1.0%	0.3%
PORTUGAL	50	32	65	70	51	68	47	52	10.1%	60	-6.0%	0.3%
SLOVAKIA	36	34	33	43	42	38	35	31	-10.8%	38	1.4%	0.2%
BULGARIA	29	31	37	28	22	32	33	17	-49.4%	30	-2.1%	0.1%
BELGIUM	15	16	21	22	22	16	16	14	-16.2%	19	-5.0%	0.1%
NETHERLANDS	5	11	14	12	8	9	7	6	-10.3%	10	-13.6%	0.0%
SWITZERLAND	9	9	8	9	9	9	9	9	0.0%	9	2.4%	0.0%
LUXEMBOURG	4	5	6	5	6	5	6	6	-6.2%	6	1.5%	0.0%
SLOVENIA	6	4	3	4	5	4	5	5	7.4%	4	8.2%	0.0%
TOTAL	21,093	19,733	22,453	21,057	21,107	23,068	22,503	21,090	-6.3%	22,038	0.0%	100.0%

## World Oat Yield

mt/ha	18/19 vs									5 Yr CARG	
	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	17/18		5 yr avg
IRELAND	7.52	6.23	6.91	7.70	8.06	7.50	7.93	6.88	-13.2%	7.62	2.8%
NETHERLANDS	4.53	5.55	6.83	6.01	5.22	5.85	4.50	3.93	-12.7%	5.68	-8.0%
UNITED KINGDOM	5.65	5.14	5.46	5.98	6.09	5.79	5.43	5.30	-2.4%	5.75	-0.1%
BELGIUM	4.36	5.59	5.53	7.11	5.67	4.49	4.11	4.50	9.5%	5.38	-5.8%
DENMARK	4.95	5.30	4.80	5.05	5.44	5.18	5.48	3.12	-43.1%	5.19	2.7%
SWITZERLAND	4.50	4.50	4.00	4.50	4.50	4.50	4.50	4.50	0.0%	4.40	2.4%
GERMANY	4.23	4.38	5.20	4.77	5.07	4.51	4.64	4.50	-3.0%	4.84	-2.3%
CHILE	4.47	5.35	4.49	4.68	4.94	5.21	4.75	4.60	-3.2%	4.81	1.1%
LUXEMBOURG	3.57	5.18	4.94	4.65	5.05	4.90	4.58	4.50	-1.7%	4.82	-1.5%
FRANCE	4.08	4.74	4.57	4.45	4.59	4.00	4.70	4.68	-0.4%	4.46	0.6%
SWEDEN	3.94	3.82	4.37	4.17	4.61	4.45	4.49	3.16	-29.6%	4.42	0.5%
AUSTRIA	4.39	3.77	3.75	4.55	4.08	4.19	3.28	3.64	11.0%	3.97	-2.6%
NORWAY	3.21	3.36	3.25	3.93	4.54	4.34	4.00	4.00	0.0%	4.01	4.2%
CYPRUS	3.63	3.39	3.19	3.60	3.65	3.52	3.23	3.81	18.0%	3.44	0.2%
CZECH REPUBLIC	3.63	3.39	3.19	3.60	3.65	3.52	3.23	3.81	18.0%	3.44	0.2%
FINLAND	3.39	3.42	3.48	3.41	3.48	3.39	3.70	2.91	-21.4%	3.49	1.2%
CANADA	2.92	2.82	3.48	3.17	3.27	3.49	3.55	3.39	-4.4%	3.39	0.4%
SLOVENIA	3.16	3.18	2.62	3.26	3.34	3.25	3.21	2.50	-22.1%	3.14	4.1%
CROATIA	3.00	3.60	2.83	2.73	3.14	3.00	2.93	2.93	0.0%	2.93	0.7%
CHINA	4.35	3.16	3.43	3.13	2.34	2.92	2.91	2.95	1.4%	2.94	-3.2%
BELARUS	2.85	3.22	2.65	3.46	3.26	2.67	3.33	2.88	-13.5%	3.07	4.7%
POLAND	2.47	2.79	2.67	2.97	2.60	2.79	2.92	2.43	-16.8%	2.79	1.8%
HUNGARY	2.42	2.64	2.64	2.67	2.84	2.85	2.72	2.32	-14.7%	2.74	0.6%
SLOVAKIA	2.40	2.17	2.35	2.79	2.64	2.79	2.36	2.21	-6.4%	2.59	0.1%
ESTONIA	2.21	2.47	2.45	2.38	2.78	2.20	2.66	2.29	-13.9%	2.49	1.7%
ITALY	2.40	2.44	2.57	2.39	2.40	2.49	2.33	2.46	5.6%	2.44	-1.9%
LATVIA	2.08	2.29	2.18	2.37	2.71	2.35	2.48	2.20	-11.3%	2.42	2.6%
LITHUANIA	2.04	2.31	2.24	2.42	2.56	2.19	2.58	2.00	-22.5%	2.40	2.9%
UNITED STATES	2.06	2.20	2.30	2.43	2.52	2.37	2.21	2.33	5.2%	2.37	-0.8%
ARGENTINA	1.57	1.91	2.07	2.14	2.30	2.45	2.24	2.40	7.1%	2.24	1.6%
ROMANIA	2.03	1.74	2.05	2.12	2.00	2.24	2.46	2.07	-15.9%	2.17	3.7%
BULGARIA	1.99	1.85	2.05	1.88	2.02	2.11	2.49	2.38	-4.4%	2.11	4.0%
BRAZIL	2.31	2.14	2.24	1.99	1.85	2.84	1.86	2.18	17.2%	2.16	-3.6%
SPAIN	2.28	1.59	2.24	1.62	1.68	2.27	1.63	2.31	41.7%	1.89	-6.2%
MEXICO	0.98	1.79	1.86	1.76	1.81	1.90	1.80	1.80	0.0%	1.83	-0.7%
AUSTRALIA	1.73	1.54	1.76	1.40	1.58	2.20	1.51	1.54	2.1%	1.69	-3.0%
RUSSIA	1.82	1.41	1.64	1.71	1.60	1.73	1.96	1.75	-10.7%	1.73	3.6%
GREECE	1.29	1.82	1.55	1.07	0.93	1.28	1.38	1.12	-18.8%	1.24	-2.3%
PORTUGAL	0.95	0.77	1.29	1.38	1.25	1.61	1.34	1.64	22.4%	1.37	0.8%
TOTAL	2.41	2.26	2.51	2.39	2.41	2.58	2.57	2.43	-5.6%	2.49	0.5%

# OAT PROCESS



# What do our customers like?

- Impressive products
  - Quality Food Awards – best breakfast product 2019 (UK)
  - 53 Great taste Awards
  - Blas na hEirean Irish Food Awards



- Relationships – supported by our team;
  - Agronomy expert – Irish provenance/Organic/LEAF
  - Product choice – quality and pack format specialists
  - Operational excellence – compliance and response
  - Market knowledge - Marketing Excellence Award CIM – Winner
- A trusted partner

# Branded Products

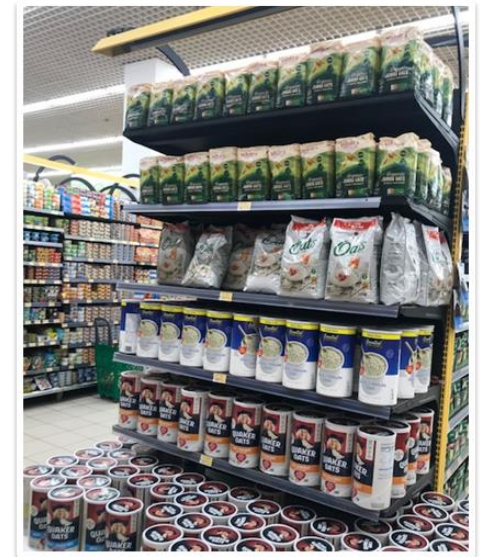


# Where do we sell?

- Domestic Market
    - Northern Ireland
    - Republic of Ireland
    - Great Britain
  - International Market
    - Western Europe
    - Middle East
- are top performing markets



Lulu Oman & UAE



# Partners that make our business a success

## Branded & Private Label Retail

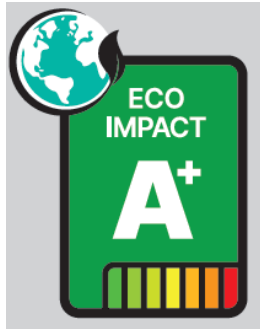


## Food Ingredients



# Eco Impact A+

Making sustainability an easy and rewarding choice for consumers



- Life cycle analysis carried out across our range of porridge oats and throughout our entire supply chain from farming right through to retail (scope 1, 2,3 measured)
- Impacts measured on carbon, water usage, water pollution and biodiversity
- Awarded A+ on all products



# Rapid change in Consumer Lifestyles Trends

- **Responsible Living –**
  - Planet conscious - Rising Veganism Trend
  - Growing Plant Based & Meat Free Market
  - Green Sustainable Packaging-
- **Health & Wellbeing**
  - Eat & drink to optimise the bodies health
  - Eating well
- **Community & Identity**
  - Positive impact on society - provenance
  - Being part of a movement – vegan
  - Express views through purchases
- **Fuller Lives**
  - Productive time
  - Sociable
  - Technology



# White's Product Development



## Caramelised Pecan Granola

Lightly baked Jumbo Oat  
Granola with Caramelised  
Pecan Pieces



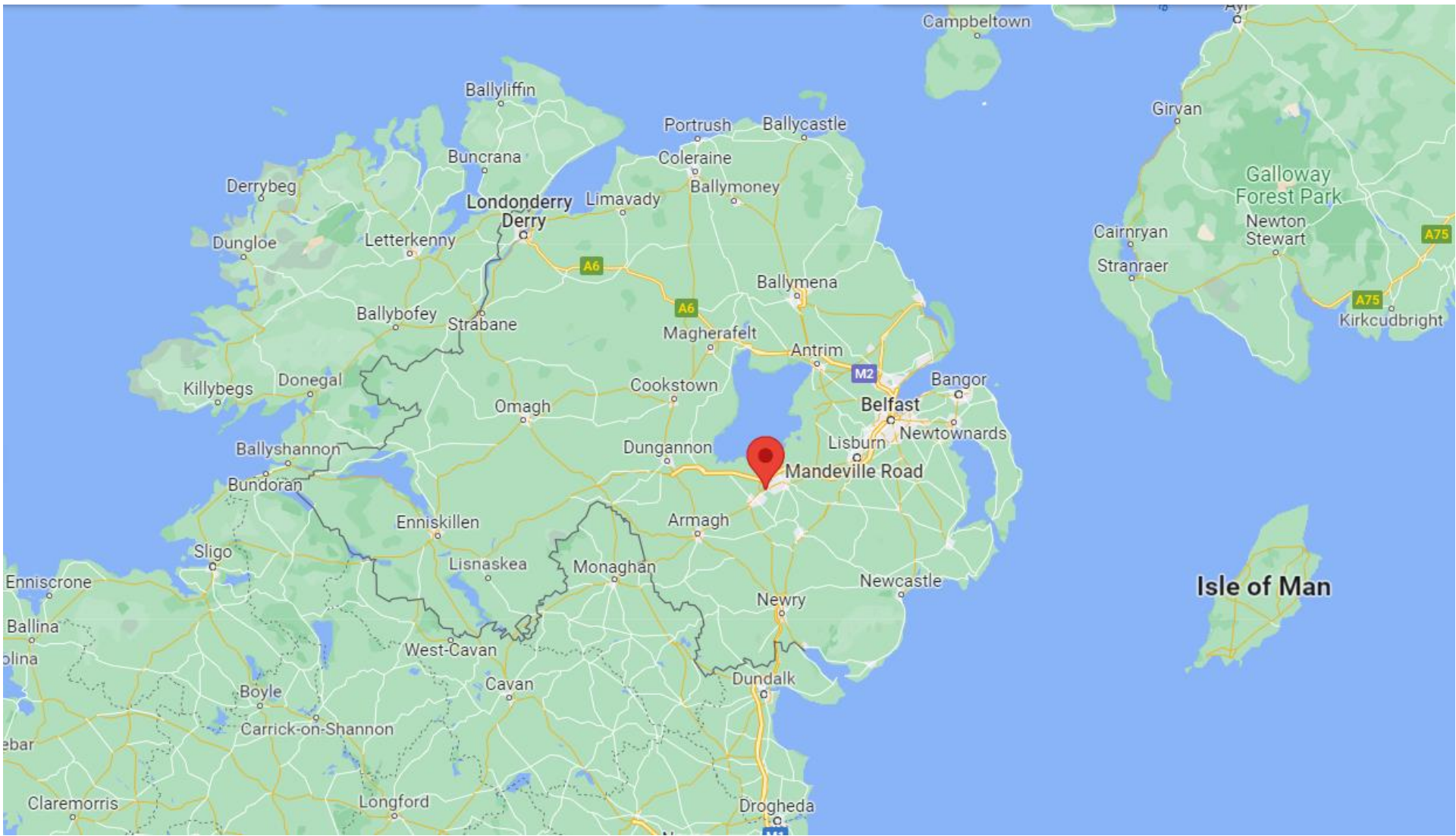
## Triple Chocolate Toasted Oats

Crunchy oat clusters and flakes  
with milk, dark and & white  
Chocolate Chunks

# Quick & Oaty Pot Range



The Quick & Oaty Pot range will launch in August 2023  
They will be available in 3 flavours - Original, Golden Syrup & Apple & Cinnamon



# Thank you for visiting White's



Serving Suggestion

**White's**  
TIME-HONORED OATS SINCE 1841