Quarterly Market Report

Autumn 2021

Entegra

Contents

Foreword

Elsabé Snyman

Head of Procurement

The headline news at the start of this quarter has been dominated by the fuel crises due to lack of delivery drivers. Never before have we seen so many conversations about the supply chain. Supply chains delivering food and other essentials are often not on the radar, even though it is one of those very important “unseen” services.

We have seen an ongoing struggle by suppliers to deliver orders in full. This is partly due to inbound supply not reaching the supplier depots in time and the ongoing shortage of delivery drivers. The unexpected pace of the economy re-opening is further contributing to shortages. Covid, Brexit, shortage of drivers, increased cost of distribution and packaging and shortage of supply are starting to show in the cost of goods. Food cost inflation is on the rise and will continue for the foreseeable future.

Entegra’s buying power ensures we remain competitive against the open market and we are continuing to deliver saving to our clients.

In the current climate, security of supply is as important as savings and this is where Entegra is a great partner for our clients.

This report provides an overview of market movement as well as some interesting facts on food commodities. Enjoy!

Fruit & Veg Overview

Moving into Autumn we look forward to longer nights and warming meals! Its time to move on from summer salads and embrace the best of UK vegetables and of course the Pumpkin!

At the start of November we see the switch into the winter produce season. Berries and salads move to EU / Rest of World origin, which naturally incurs price increases. Many fruit varieties also switch from Northern to Southern Hemisphere and vice versa, so price variances, both up and down, occur during this period. We do however benefit from locally grown root vegetables such as potatoes, onions, swedes and cabbages.

With the season switchover we cannot ignore the challenges that the category will face. Increased requirement for transport for imported goods, harsher weather in the UK and abroad, and peaks in demand for seasonal favourites, present less favourable conditions that the summer months.

Fruit

The season ends for the British berry favourites, however not to be overlooked is the Autumnal Blackberry which holds out until October / November if the weather is favourable. They are great for crumbles, pies and jams. The Damson fruit is also sticking around for a while and offers a great seasonal choice.

Apples and Pears are abundant in Autumn with plenty of varieties available. Their flavour is at its best and they are available until January. Take your pick from king of the pippins, cox orange, braeburn, antares, golden delicious pink, royal gala, pink lady, gold rush and champion pears.

Another Christmas favourite is the leafy Clementine; small, sweet and usually seedless, these imported fruits are plentily available throughout the season. Quinces and Rhubarb all compliment the Fruit offering this season.

Entegra

Autumn Vegetables

We must start with the seasonal favourite, UK grown Pumpkins, come into their own for Halloween. The more unique varieties such as the Muscade de Provence, with its cheese wheel appearance, work well visually. Remember pumpkins are not just for Halloween and can provide great flavour to soups and risottos. Its close relative, the Squash is also becoming abundant with plenty of locally grown options available.

Kohlrabi is in full swing and this mild yet sweet flavoured is very versatile; it can be eaten raw, roasted, steamed or made into soup! It is also starting to make an appearance on the Cheese Board.

The darker and colder nights provide perfect growing conditions for Parsnips, Cabbages, Swedes and Carrots, all which make great additions to stews, soups and casseroles. UK onions will be here too and are a great flavourful alternative to the Spanish.

As we move towards the Christmas season the traditional favourites appear! We cannot over look the Brussel Sprout; the most famous of all additions to the Christmas plate. They are in peak season and continue to grow in popularity as chefs create inventive ways to cook with them.

Next on the plate, the Chantenay carrot. Stored in the ground under straw during Autumn and Winter, it is a super convenient alternative to the everyday carrot with no need to peel.

Entegra

Meat and Poultry Overview

The pressure on the M&P sector is at an all-time high with a unique mix of low availability, skills shortage, and logistics disruption. Most suppliers are experiencing daily pinch points. We are proud to report that, that despite these challenges, the disruption to our clients has been minimal. That is a credit to all involved; our clients understanding the challenges, our operations team working hard to negate and advise, but most of all, our suppliers for continuing to provide an excellent service to all during this difficult trading period.

Beef and Chicken remain at record highs, Lamb has eased in price, but availability of some cuts such as Rumps will be low. Pork is more stable, but bacon and sausage may see some upward movement in the coming months.
We must continue this good work by ensuring we forward plan, speak with our suppliers about menu cycles and generally ensure they are involved in any major updates to core menus.
We must also look towards the Christmas period with hope for a strong end to the year for all.
Keeping it traditional may be the best way to ensure a successful Christmas as many suppliers don't have the staff to produce the wonderful bespoke lines many clients looked for in the past.
With regards to turkey, buying now will prove cost effective. Current pricing is average for this time of the year, but will start to increase in the next 4-6 weeks. We aren't expecting any availability challenges, but wholesalers will be looking for firm pricing this year.

Guinea Fowl

Guinea fowl makes a great alternative to chicken for any menu on an autumn night. It has a lovely flavour that is slightly gamey, but very subtle (much less assertive than pheasant or grouse). It can be magnificent when cooked simply or when combined with more robust flavours

Guinea fowl are hardy birds that forage for food and so are often farmed in free-range or semi-wild facilities where they also perform a valuable pest control function. They have an acute awareness of predators and as such are valued for their role as a 'watchdog', alerting farmers to any henhouse intrusions. It is reported that they can distinguish between farmers' family members and strangers.

Goose

Before being usurped by turkey, goose was the preferred choice for the Christmas lunch table in England and more recently there are signs of it making a bit of a comeback.
Goose meat is richer and darker than turkey. It has a higher fat content, but a lot of the fat melts away during cooking leaving deliciously tasty and succulent meat.
Although not cheap, goose makes a wonderful treat for any special meal. In addition the goose fat collected during cooking makes the best roast potatoes and is almost worth the entrance price alone.
Goose has long been important in French cuisine, where it plays a key part in traditional dishes such as cassoulet, confit d'oie and foie gras. It is now eaten widely in Europe and Asia, especially China.

Venison

Much of the venison produced in the UK is from deer that roam freely, rather than being intensively farmed, resulting in superior meat. Good quality venison is tender, tasty and close textured, which means it's easy to produce great results using simple recipes.
Meat from deer has been important in the human diet since prehistoric times. The term venison (from the Latin venari - to hunt) originally referred to meat from any wild animal.
For centuries, deer parks owned by European aristocrats have been used as a source of sport and high-quality food. This concentration of valuable meat with access restricted to the elite few has long been a source of conflict between poacher and gamekeeper.
Three species are commonly used for food in Britain: the red deer (largely from the Scottish Highlands); the fallow; and the roe (the smallest and considered the best by many cooks).

Entegra

Dairy Overview

Milk

Production levels of milk are expected to run low until the new year leading to pressure on pricing. Demand rises in the lead up to Christmas will further add pressure as will additional costs in the shape of labour, transport and feed

Cream

Cream pricing has been rising steadily across the summer due to strong demand and this will continue into autumn and winter. The Christmas season adds further pressure to supply and reaches its peak during this time. Many consumers opted for the traditional varieties last year to channel volume and maximise usage.

Cheese

Autumn is when the first of the semi-mature cheeses made with Spring milk can begin to be enjoyed. Pennard Ridge Red is very good around the beginning of Autumn, as are some of the shorter matured blues. It's also a good time to eat mature cheddars that are aged for over a year, as it's when many of them are at their peak. Vintage Lincolnshire Poacher in Autumn is good having come to maturity after around 2 years. Winslade is also recommended as we build up towards Vacherin Mont d'Or season kicking off the exciting Winter cheeses.

Winter is a really exciting time in the cheese world - warming meals such as raclette and fondue become the norm. It's hard to beat boiled potatoes smothered in melted Raclette with pickles and ham on the side.

Another great Winter cheese is the Christmas classic, Stilton. Produced in the Summer, its peak arrives in December when the optimum maturation time is reached. This is the period when Stilton really is at its best.

Cheddar prices have moved up in recent weeks due to the drop off in milk production and this will continue steadily for the coming months. Continental cheese such as Feta and Halloumi are impacted by the availability of sheeps milk throughout Greece and Cyprus.

Butter

Pricing remained stable over the summer as producers worked through surplus stock from 2020. The impact of Brexit is becoming clearer with many looking solely in the UK for supply, where previously Ireland and the EU provided volume. It is anticipated that prices will continue to rise steadily as demand for UK product continues. Imported varieties, such as French, are likely to see pressure from increased demand, coupled with the transport challenges.

.

Entegra

Seafood Overview

The seafood market is more settled than most sectors with less pricing volatility, even though it is dealing with many of the same challenges than the rest of the supply chain. Buying seasonal products caught off our waters is and always will be the most cost-effective way to put great fish on your menus.
Quotas for Cod and Haddock will have a positive effect on pricing in the coming months, pricing will remain high until new stock quotas can be caught and processed.
Salmon and products linked to this staple with remain at the current levels until we see the annual seasonal impact as demand increases.
Crab is a major issue at the moment, current pricing on UK product is at a record high. Processors have lost many of their migrate workers who pick, pack and deliver this wonderful product. We would advise a menu review, preferably removing crab if possible or at least reviewing the selling price.
Imported frozen lines such as prawns and squid are seeing logistic problems, which is adding cost to those lines.

Oysters

No other food conjures up a physical feature of the Earth as strongly as a bracing, salty, tangy oyster: the essence of the sea in edible form.
Oysters can now be obtained throughout the year but are usually better outside of their spawning period (when the waters are colder).

For much of recorded history they have been regarded a simple form of sustenance, punctuated by occasional periods in which they reached the status of delicacy.

In Britain they shifted from stomach-filler to luxury food with the arrival of the Romans, largely disappeared from the diet after they left, before returning to favour sometime around the eight century.
By Victorian times, pickled oysters were a common food of the poor in London (and in the American South in the early twentieth century the Po-Boy, a type of sandwich featuring oysters in a baguette, fuelled blue collar workers).
The era of cheap oysters came to an end quite abruptly after oyster beds became exhausted due to overfishing and pollution.

Entegra

Wholesale Overview

Oil

Poor weather conditions globally have pushed the prices of Vegetable oil to a record high. Along with Supply and demand this continues to apply pressure in the UK with the foodservice sector and biodiesel sectors expanding after lockdowns.

Rapeseed is an essential feedstock for Biodiesel. Biodiesel is heavily linked to the demand of Crude oil. The price of crude oil has significantly increased since 2020 by 160% which in turn is applying more pressure to market pricing.

Globally the market remains volatile with China continuing to buy Soybeans. South American crops have also been small which has exacerbated the market price.

Within the UK further transport delays and high sickness levels have caused delays in processing and deliveries and one to watch out for.

Sunflower and Palm oil markets also impacted and seen prices soar YoY.

Wheat

2020's bad wheat harvest is still impacting 2021 pricing. Pricing has reduced since the highest peak in February however year-on-year is still 10-15% up and therefore impacting annual contracts.

Millers use primarily imported wheat from Canada for Bread-making, France for speciality products, as well as imports coming in from the USA and Germany. With the 2020 crop being significantly down year-on-year, imports increased (54% above the 5-year average), leaving the UK millers more exposed to global markets. The global market has struggled with crop levels and challenges around weather and the increased pressure from Chinese imports. Russia (worlds largest grain exporter) also introduced wheat export tax which has further supported the global grain prices.

The UK wheat harvest, one of the most challenging for a long time, is 90% complete. DEFRA estimate the UK crop to sit at 14.5mt in 2021. This would be a market increase from the small crop (9.7mt) harvest in 2020. Despite this, the UK 5-year consumption averaging slightly higher along with continued demand from the Bioethanol sector is likely to apply pressure and result in another tightly supplied season.

It is estimated that flour is an ingredient in 30% of all foods in the UK, meaning this will impact and influence a significant number of wholesale products.

Oats

The UK oat harvest has completed, with growers reporting 5-15% lower yields in several areas. Despite this there is still surplus. Overall market looks well supported and pricing to remain healthy.

Entegra

Herbs & Spices

The EU source product from Asia and South America. The cost of sea freight in some cases has increased by 500% vs pre pandemic with industry leaders indicating prices will remain high into 2022.
Products are also impacted by local growing challenges for example, Pepper prices from Vietnam have been increasing over the past 12 months due to high demand from America and China. Cinnamon grown and sourced from South Asia are facing reduced crop size for the second year running.
Along with the continued challenges around workforce due to the physical labour work involved in these products, price increases are set to continue.

Frozen Potatoes

Frozen potato products saw prices decline 12 months ago due to low demand within the foodservice sectors. Europe also had a strong harvest creating surplus supply. EU growers reacted to the market changes by reducing planting areas by 500k hectares for the first time in 20 years.
The reduction in planting, changes to production output and the return of foodservice volume has significantly impacted the commodity price.
EU growers are now facing concerns over crop levels and low yields due to heavy rainfall and flooding in key growing regions in Germany, Belgium and the Netherlands.
Manufacturers are still struggling with Covid challenges, with increased sickness levels, consolidation of product lines as well as production disruption.
These factors are all expected to support firmer prices in the 2021 season.

Canned Goods

Increased cost of steel +70% YoY. Sea freight, energy prices and labour challenges have created an extremely challenging and costly environment for growers and manufacturers.
Tinned tomatoes are one key line which has been impacted by all these challenges. Italy, a key growing area, has been severely impacted by rain and hailstorms affecting crop quality and delayed harvest.

Entegra

Quarterly Category Forecast

Category	Sub Category	Availability	Market Price	Comments
M&P	Beef (National)			Retail demand has left foodservice with availability challenges
	European Beef (Ireland)			Retail demand has left foodservice with availability challenges
	Pork (National)			Pircing is stable, demand and price may increase in coming months
	Pork (Europe)			Pircing is stable, demand and price may increase in coming months
	Poultry (UK)			Retail demand has left foodservice with availability challenges
	Poultry (EU)			Labour shortages, transport costs, paperwork and border checks may cause delays
	Bacon			Labour shortages, transport costs, paperwork and border checks may cause delays
F&V	UK Vegetables			Labour shortages, transport availability are driving increased costs
	UK Fruits			Labour shortages, transport availability are driving increased costs
	UK Salads			Labour shortages, transport availability are driving increased costs
	Imported Vegetables			Labour shortages, transport costs, paperwork and border checks may cause delays
	Imported Salads			Labour shortages, transport costs, paperwork and border checks may cause delays
	Imported Fruit			Labour shortages, transport costs, paperwork and border checks may cause delays
Dairy	Milk and Derivatives			Demand will rise as Christmas approaches - tightening availability
	UK Cheese			Demand will rise as Christmas approaches - tightening availability
	Imported Cheese			Subject to port checks and possible delays - transport shortages may affect costs
	Butter			Demand will rise as Christmas approaches - tightening availability
	Eggs and Derivatives			Price should remain stable however may be impacted by transport costs and availability
Seafood	UK Wild Fish			Summer Season has ended so product mix will change
	Imported Farmed Fish			Labour shortages, transport costs, paperwork and border checks may cause delays
	Imported Farmed Salmon			Demand will rise as Christmas approaches - tightening availability
	Prawns & Imported Shellfish			Labour shortages, transport costs, paperwork and border checks may cause delays
Grocery	Flour			Wheat market continues to be tight. Pricing up 10-15%YoY
	Oil			Transport delays. Pricing remains volatile
	Rice			Pricing volatile
	Pasta			Pricing volatile
	Canned goods			Steel costs +70% YoY, Commodity pricing volatile

Entegra

Seasonal Products

Category	Item	Oct	Nov	Dec
Veg	Beetroot, Celeriac, Celery, Chicory, Horseradish, Jerusalem Artichoke, Kale, Kohlrabi, Leeks, Parsnips, Potatoes (Maincrop), Salsify, Shallots, Swede, Truffles (Black), Truffles (White), Turnips, Wild Mushrooms			
	Artichoke, Butternut Squash, Pumpkin, Watercress			
	Broccoli, Chillies, Fennel, Garlic, Lettuce & Salad Leaves, Marrow, Radishes, Rocket, Runner Beans, Sweetcorn, Tomatoes			
	Cauliflower			
	Brussels Sprouts			
Fruit	Apples, Pears			
	Quince			
	Bilberries, Blackberries, Elderberries, Figs, Grapes, Medlar			
	Clementines, Cranberries, Passion Fruit, Pomegranate, Satsumas			
	Pineapple, Tangerines			
Herbs and Nuts	Almonds, Brazil Nuts, Chestnuts, Hazelnuts, Walnuts			
	Cob Nuts, Rosemary, Sage			
	Chives, Parsley (Curly), Sorrel, Thyme			
Meat	Duck, Goose, Grouse, Guinea Fowl, Hare, Mallard, Partridge, Pheasant, Rabbit, Turkey, Venison			
	Beef, Lamb, Wood Pigeon			
Seafood	Clams, Cod, Coley, Dab, Dover Sole, Gurnard, Haddock, Halibut, Hake, Lemon Sole, Lobster, Mackerel, Monkfish, Mussels, Oysters, Plaice, Red Mullet, Sea Bass (Wild), Sea Bream, Skate, Turbot, Winkles			
	Crab, Pollack, Squid			
	Grey Mullet, Herring, Pilchard, Prawns			
	Langoustine, Scallops (Queen)			

Non-Food Overview

Non-Food is suffering from the same issues as food suppliers. There is a shortage of labour in particular with warehouse and transport roles. This is even more relevant with jobs that require specific skills, such as MHE or HGV licences. Self-isolation requirements are causing issues with staff being unable to attend work.

Material costs are rising in paper, plastic and stainless steel. Our suppliers are working hard to mitigate these costs.

Freight costs remain high with no sign of this returning to normal in 2021. It's widely publicised across all sectors regardless of industry on available containers and vessels to sail from the Far East to the UK. Normal lead times of 4-5 weeks sometimes being pushed out to 8+ weeks due to availability of containers and vessels along with the difficulties at the UK ports forcing some liners to take alternate routes into Europe and for forwarders to trunk via road into the UK. All of which is increasing both lead times and freight pricing globally.

Stationery

Stationary suppliers are experiencing problems with their inbound deliveries, logistics and staff reduction. Our suppliers are committed to continue reviewing and implementing plans to mitigate any new challenges as quickly and efficiently as possible.
They recognise the need for innovative solutions to address the growing requirement for homeworking. Working in conjunction with a global expert they are currently pioneering the latest evolution of the 'Instant Ink' initiative.
Homeworkers realise the benefits of clear monthly payments, rather than purchasing ink transactionally, and the convenience of not having to order replacement cartridges.

Light Equipment

Our suppliers continue to see some long lead times from some of their suppliers or on specific product types (refrigeration for example). One of our suppliers has a significant amount of stock arriving this month and next which they hope will clear a lot of backorders and see us in a good position for the remainder of the year.
There is now innovative crockery with Anti- microbial protection.

Chemicals & Disposables

The UK market is trading 200%+ on disposables as home deliveries of food continue to grow, resulting in inevitable rising costs and shortages. Those hardest hit are Solid Board, Paper bags due to the global timber shortage and Paper cups & round based food containers due to raw material shortages and challenges in the Far East with high Covid rates in production countries like Thailand, Vietnam and Indonesia.

Paper hygiene has major challenges around logistics, although the manufacturers are coping in general in terms of production. Our suppliers are actively working towards sourcing alternative products, also ensuring they have contingency supply partners for their products.

Entegra

Beverage Key Trends

Alternative Milks

You'd be hard-pressed to find a hospitality outlet that hasn't already responded to the rise of plant-based milks. Their popularity continues to grow rapidly. Three out of ten consumers are seeking vegan options for milkshakes, hot chocolate & coffee. A quarter of consumers under 35 choose plant-based milks on a regular basis and one in three consumers believe that plant-based milks (oat and nuts) add more flavour to drinks than cow's milk. Oat Milk is now the preferred dairy alternative.

Health & Immunity

It's no surprise that we ended 2020 with a heightened appreciation for our personal wellbeing. 56% of European consumers have made changes to their diets and lifestyles in order to improve their immune system. 7 in 10 consumers would consider using immune health products. Consumers most often look for immunity health boosts at breakfast time. The top 6 ways in which consumers wish to supplement their immune health are yoghurt/yoghurt-based drinks, fruit and vegetable juices, milk and non-dairy drinks, supplements, cereal/granola/breakfast bars and hot beverages.

Cold Brew

Europeans are finally warming to cold brew. Mintel cites that 40% of German cafes are now offering it on their menus. In the UK, demand continues to rise too. Cold brew offers an opportunity to strike a balance between delivering on taste and being 'better for you'. Millennials are particularly interested in expanding their coffee drinking habits. Dairy-free indulgence can also be delivered alongside cold brew, with 29% of consumers seeking vegan options in their coffee.

Post COVID opportunities

According to latest Mintel report, there is opportunity in adversity.
Eating out as a regular luxury: 35% of European consumers say eating/drinking OOH is the number one thing to do post lockdown.
Transportable take-away products: 37% of UK consumers agree that ordering coffee for delivery is more convenient than visiting a coffee shop.
Easy Prep: Concepts that are efficiently prepared will help shorten queuing time in cafés as consumers grapple with social distancing as the norm.

Entegra

Christmas Trends and Insights

As the nation missed out on Christmas in 2020 this year is expected to be a real cause for celebration with 61% of people wanting this year to feel extra special. The corporate business is not expected to hit 2019 levels as businesses slowly recover, however over 53% of people state socialising with family and friends over Christmas is what they are most excited about and this should see a healthy Christmas for the industry.

As a nation we love the traditional Christmas dinners offered on menus and this continues this year with 47% saying they will look for these items on menus on the run up to Christmas, however 27% of people will be looking for something new and interesting to try so getting a good mix on your menu offer will be the key to success.

Bookings this year are taking on a different format with the consumer still a little hesitant to book too far in advance. Offering flexible cancellation policies and transparency around deposits is advised to encourage early bookings. Sneak peaks of festive menus and any added experiences to the night will entice guests to book so if you haven't written your menu yet please see some examples from our suppliers below which may help.

Christmas Menu Ideas

As staffing levels in the industry are still at an all time low the thought of creating and producing an exciting, tasty Christmas menu may be a little daunting. Our suppliers have been producing amazing Christmas menu ideas for many years that are ready prepared helping on labour at this crucial time, please see below a snapshot of items that are available:

Dauphinoise Potatoes – A luxurious garnish for any dish made with sliced potatoes and double cream, seasoned then cooked, chilled and pressed this is a very labour intensive dish which the supplier has made for you and sends in perfectly pressed ready to slice into whatever shape you choose.

Terrines – A perfect starter to have on any Christmas menu as this can be sliced and plated to help on service. Our suppliers have over 50 varieties of handmade terrines ranging from Game to seafood and even vegan options

Birds – Christmas wouldn't be complete without a turkey of which they have a full range of sizes and roulades made with various stuffing's and rolled in pancetta for that extra touch. To offer something a little different from the mainstream they also stock stuffed chicken breasts, grouse, pheasant and Partridge sourced from the best estates throughout the UK.

Alternative meats – If turkey is not to your liking and you would like to offer an alternative meat on your menu a slow braised option is a good idea. Our suppliers offer a range of slow cooked options including beef shin which braised, picked, seasoned and rolled ready for you to portion out for service or to freeze for use later in the month.

Trimmings – Some say the trimmings are the best part of a Christmas meal but when cooking for hundreds or even thousands of guests it can be hard to maintain consistency. Luckily our suppliers offer a great range of items including stuffing balls or logs to slice in house, pigs in blankets, a tasty turkey jus and even walnuts to add into your sprouts.

Please get in touch for more information

Entegra

Fair Kitchens

Entegra have teamed up with #FairKitchens!

Fair Kitchens is a movement to better the lives of operators around the world. Connecting and opening the conversation around healthy working conditions and call for change, because a healthier culture makes for a Healthier business as well as retaining talent and attracting new talent.
Overall the aim is enabling people working in the industry to feel engaged, valued and thrive!

Various surveys conducted by Unilever and Hospitality Action showed 68% of participants said stress levels within the industry have increased over the last 3 years, 54% pushed to breaking point and 74% of chefs feel sleep deprived to the point of exhaustion. 36% of workers from the survey are considering leaving the industry. Overall people in the foodservice are not thriving and employers are struggling to retain or recruit staff.

The movement is being driven through Social media campaigns, digital campaigns and ambassadors, with frameworks designed to provide key tools to start the conversation, provide insight and access to specific resources such as FREE online mental health training and leadership training.

For more information, please contact our ambassador Marc Mattocks (marc.mattocks@entegraps.uk) or your Entegra contact.

Entegra Europe
are your savings solutions partner, working across the catering industry to improve the operating margins of all the clients we serve.

Entegra Europe
operates with a self-funding, savings-led model, removing any up-front costs or risk.

We specialise in procurement services, delivering operational margin improvement and providing system solutions to enable our clients to protect their profit margin and deliver improved efficiency.

Food Procurement

Operational Support

Recipe Costing

Allergen Management

Food Flash

Procure to Pay

Client Dashboards

Connect with us

www.entegraps.uk

Entegra Europe

@EntegraE

Entegra Europe

Entegra