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Sustainable Food Procurement for Local Prosperity:

Final Evaluation Report

JUNE 2023



This project has received funding through the Welsh Government Rural Communities - Rural Development Programme 2014-2020, which is funded by the European Agricultural Fund for Rural Development and the Welsh Government to pilot two new procurement food hubs in Carmarthenshire and North Powys.



OPEN FOOD
NETWORK UK



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Executive Summary

Background

In April 2022 Social Farms & Gardens (SF&G) obtained a grant from the Welsh Government under the RDP Cooperative Supply Chain Development Scheme to run a Sustainable Food Procurement for Local Prosperity pilot project. In September 2022 the BRO Partnership (BRO) were appointed to evaluate the pilot project, with an end date of June 2023.

The pilot trials the establishment of two community focused Food Hubs (in Powys and Carmarthenshire) as a mechanism for local producers to provide the scale and technology needed to supply the public sector effectively. The main aim is to create an evidence base to show how the public sector could procure fresh fruit and vegetables from local producers who are using methods that benefit the natural environment, health and local prosperity.

BRO has also been commissioned to produce a separate advocacy document, *The Role of Public Procurement in Transforming Wales' Food System*, which puts the findings of the pilot project into a wider policy context.

Methodology

The evaluation involved:

- Developing a Theory of Change Logic Model and subsequent Evaluation Framework.
- Two Site visits to each hub, one at the start of the evaluation and the second near the end of the funding period.
- Interviews with a range of key partners, including growers and buyers, as well as members of the project's Steering Group.
- Attendance at Workshops and Conferences.
- Close collaboration with the client in monitoring the targets and milestones.

Key findings

The pilot has been highly successful in terms of learning and providing a baseline for further interventions. However, in order to take this work forward, more support will be needed in terms of financial underpinning and assurance to encourage behavioural and culture change. One of the major barriers is the current procurement system and the emphasis on price, as opposed to a full cost accounting methodology. It should also be acknowledged that the sector is very under resourced and often relies heavily on the goodwill of part time hub staff and growers who are holding down multiple jobs.

The horticulture sector in Wales needs to be considered within the wider context of agriculture. There are marked differences in practice and operation size, which often results in highly intense agroecological horticulture enterprises being excluded from the government support available to larger, predominantly meat and dairy farms. The forthcoming Sustainable Farming Scheme (SFS) presents an opportunity to bridge this divide.

The pilots have demonstrated that increasing demand for fresh fruit and vegetables through public procurement could play a very significant part in kick-starting a new approach to horticulture and farming in general.

To summarise, the pilot project has shown great potential and has highlighted issues that can only be really addressed on a national and in some cases international basis.

Recommendations

To build on the work undertaken during the pilot, the following recommendations are put forwards:

1. Every effort should be made to ensure that the work started in the two Food Hubs (Foothold and Cultivate) continues. This now seems to be happening.
2. The role of the Steering Group should be adapted to reflect wider aims of networking, collaboration, as well as sharing resources and skills pan Wales and across sectors.
3. Political advocacy should be a key component of any further developmental work and more should be done to increase awareness of the issues raised and the recommendations proposed, by the pilot project.
4. There should be a clear roadmap that will lead to transformative and sustainable changes in the horticulture industry and this needs to be set within a Monitoring and Evaluation framework.
5. More training and education is needed to address the skills gaps across the board (e.g. social value procurement, growing for market, biodiversity, using fresh and seasonal ingredients etc.).
6. Whilst the pilot was able to collect some data on nutrient density, carbon footprint and sustainability, there were limitations in term of time and scale. That said, a lot was learnt about how to go about collecting data. This included how to provide frameworks and training to support growers and hubs to collect robust data without creating additional administrative burdens. This element of the pilot is very important and needs to be continued.

The findings of the Pilot project and the direct experiences of Cultivate and Foothold Cymru formed a central component of the advocacy document produced in parallel with this evaluation and subsequently launched at the Senedd on the 8th June 2023.

1. Introduction

Horticulture is a key growth sector for the Welsh Government (WG), essential to delivering the objectives of the Rural Development Programme (RDP) for Wales and contributing to the ambition to grow the food/drinks sector by 30%, increasing industry turnover to £7billion.

Social Farms and Gardens (SF&G) has over 40 years of experience in managing and delivering a range of large-scale projects on a UK-wide, country and regional basis. Recent initiatives have included support for community growing and horticulture on a pan-Wales basis through the Lottery-funded Tyfu Pobl programme and the RDP-funded Tyfu Fyny programme (2017-2020), as well as managing the long-running Community Land Advisory Service (CLAS) Cymru which makes land available for community use by working with public and private landowners.

During 2020, Covid-19 and Brexit negotiations highlighted many of the issues that Wales faces in producing its own food, particularly food that improves the health of our nation, reduces socio-economic inequalities and enhances biodiversity.

In 2021//22 SF&G obtained a grant from the WG, under the RDP, to run a Sustainable Food Procurement for Local Prosperity pilot project. In September 2022 the BRO Partnership (BRO) was subsequently commissioned to evaluate the pilot project with an end date of June 2023.

This pilot project set out to create an evidence base to prove that the public sector can procure efficiently from local producers using methods that benefit the natural environment and local prosperity. It piloted the use of Food Hubs as a mechanism for local producers to provide the scale and technology needed to supply the public sector effectively.

The project supported two Food Hubs (in Powys and Carmarthenshire) to expand their reach and move into procurement, whilst still delivering the Food Hub vision of a connected, local and environmentally-sound model. Powys and Carmarthenshire were chosen for the location of the hubs as these rural regions were already exploring innovative approaches and collaboration to develop local supply chains. The project provided an opportunity to support them with investments to diversity and work towards the economic and environmental benefits proposed within the forthcoming Agriculture (Wales) Bill.

Covid-19 and Brexit negotiations have highlighted many of the issues that Wales faces in producing its own food, particularly food that improves the health of our nation, reduces socio-economic inequalities and enhances biodiversity.

Procured services in the UK is a minefield of legislation, bureaucracy and paperwork, the Partnership have provided expertise and training to ensure access for Hubs and growers. The project aimed to allow the development and

adaptation of existing technology to meet the needs of customers using procurement systems and provided added data to build the case for this model.

The case studies and data produced is intended to be disseminated via Sustainable Food Places and other networks to encourage wider participation from large-scale purchasers, growers and rural communities.

In parallel to undertaking the evaluation of the pilot, BRO have also been commissioned to produce a separate advocacy document which puts the results of this work into a wider legal and policy framework.

2. The Pilot Project, Background and Set Up

Building on SF&G's experience the pilot project was established on the following lines:

Delivery and coordination by SF&G, in collaboration with named delivery partners and supported by an experienced steering group.

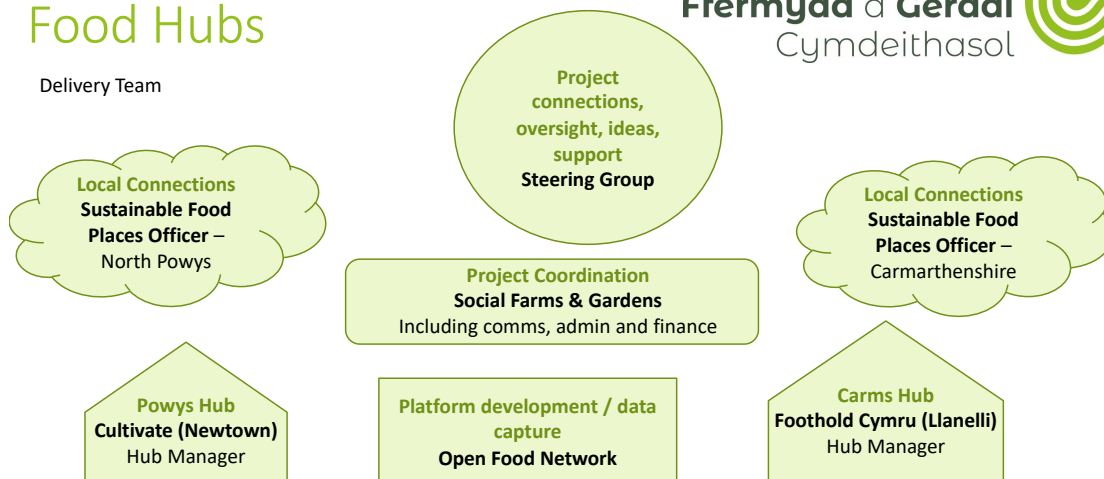
Delivery Partners:

- Open Food Network UK
- Hub 1 - Cultivate, Powys
- Hub 2 - Foothold Cymru, Carmarthenshire
- Social Farms & Gardens
- Development Trusts Association Wales

Sustainable Procurement Food Hubs

Delivery Team

Social Farms & Gardens
Ffermydd a Gerddi
Cymdeithasol 

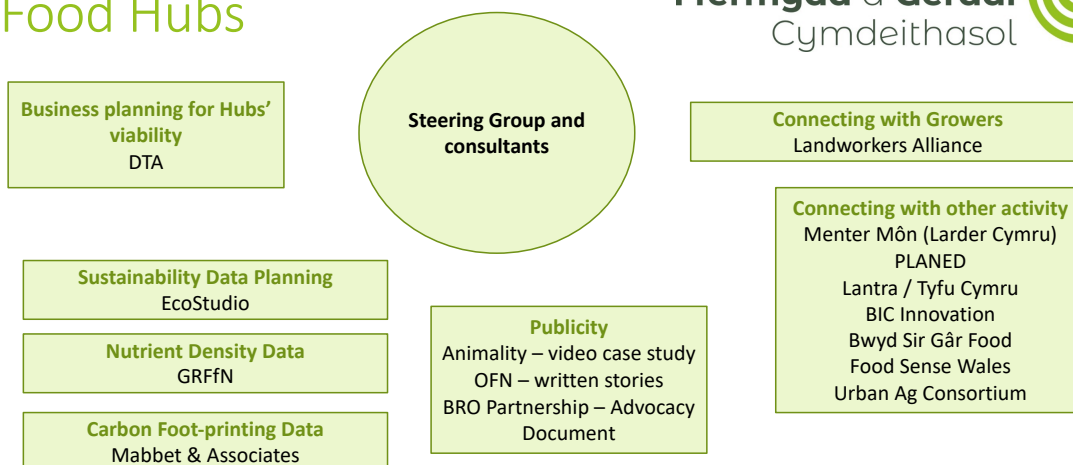


Social Farms & Gardens – Growing well together

Steering Group:

- Lantra / Tyfu Cymru
- BIC Innovation
- Carmarthenshire County Council
- Landworkers' Alliance
- Food Sense Wales
- GRFfN
- EcoStudio
- Menter Mon
- PLANED

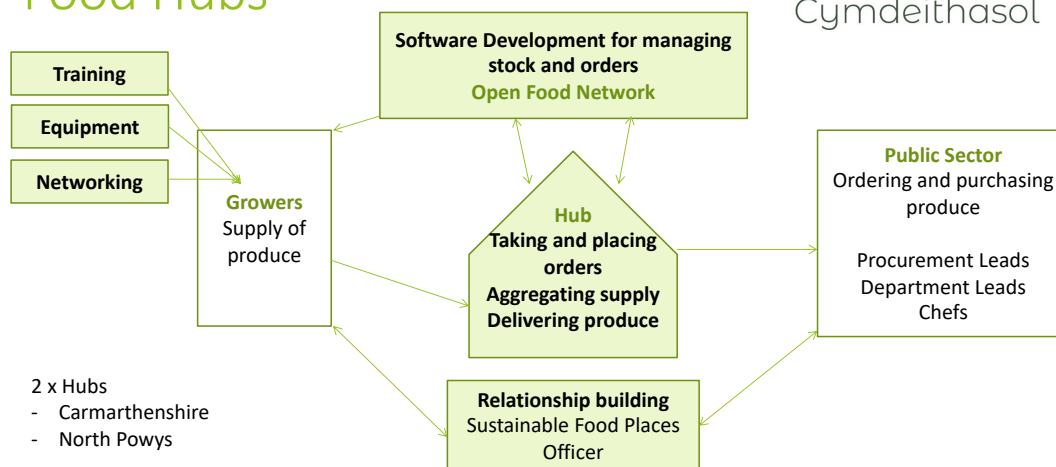
Sustainable Procurement Food Hubs



Social Farms & Gardens – Growing well together

The details for the two pilot Hubs were as follows:

Sustainable Procurement Food Hubs



Social Farms & Gardens – Growing well together

Another key aspect was the Delivery Plan. The original version is included as Annex 2. This was modified following the sign-off of the Theory of Change Logic Model and a new version was produced which grouped the activities in a more coherent way which ensured a more effective and transparent way to monitor the pilot.

3. Methodology

3.1 Introduction

Following an Inception Meeting with the client on the 5th July 2022 (see Annex 1) BRO subsequently undertook further background research, organised some scoping interviews and assessed the information held on the Project's joint Sharepoint platform.

3.2 Theory of Change Logic Model

From this information, a draft Logic Model was presented to the client on the 29th September 2022 and through a co-design process a final version was then agreed, see Annex 2.

3.3 Development of Evaluation Framework

From the Theory of Change Logic Model, it was then possible to draw up a Monitoring and Evaluation framework. This was in two parts, first a framework for the targets was set:

| What | How | Who | When |
|--|---|--|---------------------|
| 1 co-operative action supported | Evidence of project start | SF&G | May 22 |
| 1 feasibility study completed | Documents produced <ul style="list-style-type: none">- 6 case studies- 1 advocacy document | OFN BRO / Partnership | March 23 June 23 |
| 20 holdings / beneficiaries supported | 10 growers engaged in project and part of local network in each region. Interactions recorded on spreadsheet. Sign up and attendance list of networking meetings. | Hubs Hubs | March 23 |
| 16 information dissemination actions / promotional and / | Project comms log | SF&G Delivery partners also to record activity. | June 23 |

| | | | |
|--|--|--|---------------------------------------|
| or marketing actions undertaken | | | |
| 2.6 jobs created | Contracts of new project staff | SF&G | July 22 |
| 1.48 jobs safeguarded | Contracts of existing project staff | SF&G | July 22 |
| 2 networks established | See above - two growers networks. Evidence of meetings attended. | Hubs | May 23 |
| 30 participants in training | Central training tracker (internal and external). Attendance lists from training events. (Feedback forms from training sessions) | All delivery staff | June 23 |
| 50 stakeholders engaged | Stakeholder engagement tracker | All delivery staff and steering group. | June 23 |
| 8.5 training days | See above (training tracker) - pre-planned in events calendar | SF&G to collate evidence | June 23 |
| £22,432 public expenditure for training / skills | Budget | SF&G | June 23 |
| Two new food hubs operating and able to sell into the market | <ul style="list-style-type: none"> Hub visits Evidence of sales into the market | BRO Hubs | Ongoing |
| Advocacy document | <ul style="list-style-type: none"> Document completed Document launched / disseminated | BRO / Partnership | March / April 2023 May / June 2023 |
| Training delivered | <ul style="list-style-type: none"> Observations / attendance at events Attendance lists Photographs | BRO Organisers | Ongoing |

| | | | |
|---|--|---|---|
| | <ul style="list-style-type: none"> Feedback from participants (survey) | | |
| Training materials and assets | <ul style="list-style-type: none"> Evidence of materials produced | Partnership | Ongoing |
| Events delivered | <ul style="list-style-type: none"> Observations / attendance at events Attendance lists Photographs Feedback from participants (comments) | BRO Organisers | Ongoing |
| Publicity materials and assets | <ul style="list-style-type: none"> Evidence of materials produced | | Ongoing |
| Effective and sustainable partnership established | <ul style="list-style-type: none"> Stakeholder interviews Attendance at steering group Exit strategy produced | BRO Partnership | Ongoing / End of project |
| Data on: <ul style="list-style-type: none"> nutritional value of food produced Impact hubs' ways of working has on supporting WFGA / correlation with current / future WG legislation / policy Carbon and environmental impact | <ul style="list-style-type: none"> BRIX refractometer comparative values Scientific analysis (product and soils) Three stage assessment of hub activity Hub analysis of processes and procedures (tbd) Mapping of WG existing and emerging policy Mapping of growing locations and methods | External consultants Steering Group BRO | Ongoing January 2023 |

And secondly, the original project plan was re-grouped into the following framework:

A. Pilot Hubs

A.1 Hub Set Up

- Confirmation of two hub host organisations
- Secure premises for hubs
- Recruit hub managers
- Employment of sustainable SFP officer in Carmarthenshire
- Confirmation of capital equipment for expenditure
- Induction process for two new hubs
- Fit out hubs with required technology and storage / infrastructure

A.2 Hub operation

- Adaptions to OFN platform
 - Relationship building hubs and growers / producers
 - Relationship building hubs and customers
 - Peer to peer visits for hubs x2
 - Capital investment for growers
 - Certification of food hubs

B. Communication

- Press releases
- Establish project communication assets
- Public information events x2
- Translation of all resources and assets
- Written training aids / case studies x5
- Video training aids / case studies x2

C. Evaluation

- Recruit evaluators
- Measuring added value of this pilot
- Interim evaluation
- Exit strategy review of business case, future funding opportunities
- Key learning document
- Final evaluation

D. Governance

- Steering group terms of reference
- Steering group meetings x 8

E. Project Management

- Delivery partner roles and responsibilities
- Quarterly claims to WG

F. Training

- Hub staff training food standards
- Hub staff training business skills
- Producer / grower face to face networking training events x2
- Virtual producer training events x4
- Project partner training
- Other training for stakeholders and beneficiaries

Both these frameworks were reviewed with the client on three occasions in 2023 and this process is recorded in Annex 4.

3.4 Site visits to the two hubs

An initial visit to Cultivate in Newtown was undertaken on the 29th September 2022 and a subsequent visit to Foothold in Llanelli took place on the 6th October 2022. These visits provided a very useful introduction to the work of the two Hubs and to discuss the challenges each one was facing.

Second visits to each Hub was undertaken in April and May 2023, as the project was nearing its completion.

Notes from these visits are included as Annex 5.

3.5 Interviews with key partners

A total of 15 interviews with key partners were conducted (plus one email response to the questions) up to the end of December 2022. After this number of interviews, there was a 'saturation point' where no new information was forthcoming.

The interviews included:

- Procurers- who have undertaken to procure small amounts of produce from the hubs for a care home, visitor attraction, college and 2 schools. NB only Powys took part in these interviews.
- Suppliers/local growers.

- Members of the steering group (each with a different perspective/specialism - nutrition, ecology/sustainability and local growing/chef/sustainable food officer for 1 of the areas).
- The Managers and Sustainable Food Officers of the two hubs
- A commercial, independent food wholesaler.

In addition, there were also a number of informal conversations at the Wales Real Food and Farming Conference (November 2022) that informed the qualitative findings.

The general feeling was that this type of hub, and ‘breaking into’ the public procurement arena were good things to do, but that it would need significant (and longer term) up-front funding, policy change and continued support - both strategically (e.g. from the Welsh Government) and operationally, to ensure development towards sustainability.

There was also collective agreement that producing locally is exactly what is needed as part of a sustainable food system, but that there were significant challenges in terms of supply/demand, transport, logistics etc. However, it must be acknowledged that the interviews were carried out with ‘like-minded’ people who generally support the principal in the first place.

One interviewee advised that some emerging academic behaviour change evidence has recently concluded that “convenience is here to stay” and this aligns with what the Public Sector interviewees often articulated. For example, there appears to be a clear need for fruit and vegetables to be pre-prepared in readiness for use by catering services. This is essential due to the limited time school catering staff have to prepare meals for the children at the schools. This pre-preparation could simply be cleaning and chopping, but a number of those interviewed also stated that there will be increased demand for pre-packed meals that can be sent directly to the schools. This is particularly pertinent as fewer schools now have on-site kitchens.

Exploration of this form of processing is already happening in the Cwm Taf Health Board footprint and BRO understands that discussions are underway to develop similar activity in Carmarthen.

The growers all articulated a need for support to get them “up and running” so they can produce collaboratively and in greater quantity. The Puffin Potatoes model was often cited as a successful one in this respect. This organisation report now having a productive business model working as a consortium of potato growers. This is something that could be explored with other produce.

Concerns were frequently raised in terms of how this model could be sustained during the time that it will take to:

- Revise procurement processes.
- Overcome purchasing decisions being made on price alone (i.e. will take some time for Local Authorities, hospitals etc. to move to full cost accounting, particularly in this current climate).
- Bring increased supply in line with increased demand - this will be a “juggling act” in the short term.
- Encourage long term funding support from Welsh Government
- Promote behaviour change.
- Educate public sector, children, farmers, growers etc. on what is needed to move Wales to a more resilient food space.

One interviewee from a Local Authority (catering team) said they would like to continue this pilot work for another year in order to “grow it”. Overall, with both catering departments in both Local Authority areas, there was definitely a genuine desire from those already subscribed in the pilot for this work to continue and grow.

From a commercial buyers’ perspective, a leading wholesaler to the public sector is currently spending in excess of £230k per annum on locally grown potatoes (from Puffin Potatoes) and would like to buy more locally grown produce but feels there are many things that would need to change before that would be possible. Cited were issues around supply, price, transport, responsiveness to changes in demand, logistics and in particular that the demand for locally grown does not appear to be a main driver, at least as of yet, in their opinion.

Finally, a common theme was in relation to the ‘All Wales Menu’ that the public sector currently have to adhere to. Interviewees widely thought that this needs significant revision to allow the use of more seasonally available ingredients and greater flexibility to mitigate for gluts/shortages in locally grown produce.

3.6 Attendance at Workshops and Conferences

1) Rob Owen attended the Landworkers’ Alliance event held at the Norwegian Church, Cardiff on the 19th November 2022. This highlighted several useful case studies, including the Courgette Pilot Project which took place at Blas Gwent and involved Castell Howell.

2) One of the BRO Associates, Jules Davies, attended the Wales Real Food and Farming Conference in November 2022 in order to meet a number of the parties involved in all the Sustainable Food Hubs pilots and wider players in the food sector in Wales. The conference brought together a range of producers, growers, farmers, academics and other interested parties to discuss food and farming issues.

A number of issues relevant to the SF&G pilot project were discussed, including:

- The possibility and viability of procurement of food for schools and care homes (particularly in Carmarthenshire).
- There are many barriers to growing local produce. These include:
 - Prohibitive costs due to a lack of economies of scale for small growers,
 - Low wages,
 - The lack of availability of land workers, especially those with ‘green’ skills,
 - The lack of affordable housing for land workers,
 - The nature of government subsidies for agriculture and horticulture, and
 - The availability of suitable land.
- The conference also focused on the need to map land for community-based growing and discussions around what support (e.g. grants/subsidies) that small local producers would need if there was to be any move towards effective ‘scale-up’ of supply.

From these events, BRO gained a holistic understanding of the wider picture in relation to food growing/supply/barriers to public procurement etc. in Wales. This triangulated the research and interviews to produce a full picture that is articulated in the advocacy document, as detailed in the introduction section.

4. Findings and Lessons Learned

From all of the field work undertaken we have amalgamated the following key findings and highlighted the main lessons learnt.

4.1 Delivery

In terms of the delivery of the pilot project there is clear evidence of a number of successes, as well as a range of issues which are more problematic or challenging. These are summarised below:

Successes:

- Developed local supply chains that were able to tap into the public procurement system.
- Increase in knowledge, capacity and understanding of the local food network amongst the food hub host organisations and the importance of agroecological production.
- One key success has been the excellent relationships that have been developed with the procurement teams in the Powys and Carmarthenshire. There is an enthusiasm and political support for the approach and this provides a vitally important platform to build upon.
- The establishment of the Steering Group for the project is also a mark of success and this has the potential to develop as an important mechanism for future collaboration.
- The pilot project is on track to meet its RDP targets and this is a mark of success especially within the context of the very tight timetable to deliver such a complex initiative.
- The production of an advocacy document has been successful and this has been developed in a collaborative way with the whole Steering Group. This document puts the learning developed through the pilots into a wider context. In addition, an event is now being organised in the Senedd in early June and this provides a platform to launch the advocacy document and the learning from the pilot project.
- Considerable effort has gone into developing and strengthening local networks of growers and buyers through the Sustainable Food Places Officers. These again form a strong foundation for what might come next.
- The use of nutrition and carbon testing has been informative and this highlights other issues that need to be considered for future project development.
- Promising links have been developed with Castell Howell which is one of the leading Wales wide wholesalers . There is scope to build on such relationships and widen the approach to include other wholesalers and companies who specialise in preparing fruit and vegetables e.g. 'Slice and Dice'.
- The feedback from events has been positive (see Annex 6).

- Customer satisfaction in terms of the produce has been very high, reflecting the quality and freshness of the fruit and vegetables supplied. As a result there is strong support for the initiative to continue.
- The potential of the wide ranging educational value associated with sustainable food hubs has been frequently raised by a cross section of stakeholders. This is an important element that can be incorporated into future delivery models.
- OFN development work to simplify stock aggregation across producers has been received positively by project hubs and with interest by other food hubs nationally, illustrating support for further technical development in this area.
- And lastly, and worth highlighting, the lessons learnt from the pilot project have been invaluable. There is now a far greater understanding of the barriers, issues and key drivers getting the public sector to procure locally sourced, fresh horticultural produce.

The other side of the coin is that the pilot project has highlighted some issues and short term challenges that are very difficult to resolve, and some of these are highlighted below:

Issues and short term challenges

- The biggest challenge for the pilot project has been matching supply and demand, particularly within such a short timescale. The time it takes to engender behaviour change, in terms of growers needing certainty of demand and customers needing certainty of supply, should not be underestimated. A growing season is planned a year in advance and within the timeframe of the project this was impossible to influence in this instance.
- It's also important to take into account that the pilot project is starting from a low base, with small scale growers, and many of these already have outlets for their produce which are outside the public sector. As such, unless there is more certainty about demand, it is often difficult to encourage existing growers to increase productivity or switch from smaller volumes of high value crops sold directly to consumers, to lower value crops required by public sector customers on a wholesale basis.
- To increase production there are a number of barriers:
 - There is a need for more investment in capital equipment,
 - Increased access to suitable, affordable land
 - Accredited training for growers.
 - Lack of resilience to changes in price and demand amongst small scale growers.
- The evaluation highlighted that food hubs and buyers were apprehensive of using a new system on Open Food Network (OFN), but to manage greater volumes a standardised, centralised order system will be integral to their success. Hub managers nevertheless praised the advantages of a 'digital first' approach in ultimately maximising efficiency and reducing admin time.

- The All Wales Menu for school meals is another short term challenge. This is a significant barrier in terms of promoting seasonality and adopting a more flexible approach to preparing meals.
- There is an additional factor in engaging with schools, in that even if they do agree to buy locally they are closed during the summer season when most fresh horticultural produce is available.
- Indications are that the majority of buyers want produce that is already cleaned and pre-prepared; because of time or space restrictions. Convenience is an important factor.
- There are issues in terms of selling local produce at a competitive price, particularly if procurement teams are basing their decisions purely on budget and not taking into account wider benefits such as nutrition, soil quality, local employment etc. (i.e. 'all cost accounting')
- Transport and delivery logistics are very challenging in rural areas, particularly when servicing small scale operations and such logistical costs (including staff time) were not included in the pricing within this pilot.
- Public sector budgets are increasingly under pressure and this makes it even more difficult to promote a wide social value approach to procurement.
- In addition, the £5k threshold for procurement through a single tender is a major constraint. For the pilots this has been less of an issue, but going forward a way has to be established of enabling local growers to successfully sell their produce within the wider arena of framework contracts which inevitable favour larger scale suppliers.
- Another apparent issue that emerged through the evaluation was the need to 'join up' all the various related projects, including the other developing food hubs, as well as wider food projects, such as food pantries, school based projects, allotments etc.

4.2. Emerging themes

From the above analysis a number of clear themes emerge and this are highlighted below:

- The strong commitment and enthusiasm to buy local produce and the support for the initiative within the public sector and particularly the procurement officers is vital. The pilot project has clearly demonstrated this - which is an essential factor in any subsequent phase.
- That said, there are substantial challenges in terms of making each hub sustainable and securing long term and consistent demand from the public sector.
- The pilot project has certainly been very successful in terms of developing an understanding of the barriers and identifying potential solutions to these and this is a very good result within the short timescale for delivery. In other words a positive start has been made in tackling a highly complex issue.
- The pilot project and the lessons learned need to be understood within the wider political, socio-economic and environmental context. Much of this debate

has been captured in the advocacy document produced in parallel with this evaluation, which has used the lessons learnt from the pilot to highlight the need to much more substantial and structural changes to our food system in Wales.

- It is clear from the evaluation that the work initiated as part of the pilot project needs to continue and that the momentum generated is sustained.
- This will require action on a number of fronts, and in particular to advocate a more joined up approach based on creating 'movement' of food projects across Wales. This will require considerable leadership and awareness raising.

4.3 Post pilot

In considering what might happen once the pilot project has been completed we have highlighted some longer term opportunities and challenges and these are summarised below:

Opportunities:

- Imminent new Senedd legislation and policy initiatives, notably relating to procurement, community food growing and sustainable farming, present an opportunity to radically set a new course in terms of horticulture in Wales. Similarly the roll out of universal free school meals should provide additional opportunities for purchasing within the public sector. As such, the results of the pilot project are very timely.
- Local food supply and shorter supplies chains can help deliver Net Zero targets.
- Whilst the focus of the pilot project has been on public sector procurement, in reality most growers will adopt a mix/match approach. This will involve selling to both the public sector and local outlets. The lessons learnt from this pilot project therefore need to be amalgamated with other initiatives which have focused more on selling locally e.g Tyfu Dyfi. Much could be gained from all of sustainable food hubs sharing their experiences and operating in a more collaborative way.
- The sharing of equipment, processing facilities, staff and skills should be a fundamental principle for future initiatives.
- Both growers and buyers will need to adopt more flexible approaches. This will involve diversifying the range of produce and adopting more seasonal approaches to meal preparation.
- Much could be gained from improving brand awareness of local produce.
- The provision of local training, education and awareness raising will play a significant part in ensuring that the hubs become sustainable and are seen as a vital part of each community. This could include:
 - The potential for some of the established training organisations at all levels to provide and coordinate accredited training in the area of food growing. However, growers are often busy and do not have the time to research and attend courses.

- The potential for local hubs to take a central role in organising educational visits to farms and increasing understanding of the farm to fork journey (linking in with the new Curriculum for Wales) can lift the burden from schools and farmers in facilitating these visits.

A 'hyper local' model for the hubs with growers supplying directly to local outlets could facilitate education provision and prove to be more sustainable, overcoming some of the transport and logistical problems.

- Longer term time timescales to develop each of the food hubs will be essential. This will enable each area to work towards matching supply and demand and ensuring greater consistency in the use of the OFN platform.

As well as substantial opportunities going forward there are also longer term issues and challenges and these are summarised below:

Longer term challenges:

- In order to grow the sector there will be a need for more investment, both in terms of capital infrastructure costs and revenue for costs related to growing produce - such as supplementing the low wages offered in the sector. Funding needs to be long term and take into consideration growing seasons and planning schedules.
- Because Wales' horticultural sector is starting at such a low base, it will take substantial and consistent support and intervention to grow the industry. This is hampered by that fact that many existing growers do not want to expand, either for lifestyle reasons or possibly because of the uncertainty of demand, the threat of pests and diseases, along with the long hours and low wages.
- Ensuring some sort of price stability will be particularly challenging during a time of very high inflation, especially for food. Instability in the market and the cost of living crisis present formidable barriers preventing the growth of the sector.
- The Food Hubs have to be run on a commercial basis and cannot rely on grant funding to stay in business.
- There is also the lack of a seasonal workforce for harvesting and preparation, and this is partly due to Brexit and the existing low salaries.
- Displacement of existing businesses (e.g. indications are from one of the procuring customers that as a result of greater knowledge, they will start to grow their own herbs rather than bulk-buy locally).
- The challenges of distribution in rural areas will need to be tackled.
- In order to grow the sector in any real way more suitable land will need to become available.
- And lastly, it is clear that any substantial increase in the production of fruit and vegetables in Wales for local consumption will take time to become established. This will depend on a long-term cultural change in our attitude towards locally produced, fresh fruit and vegetables.

5. Conclusions and Recommendations, including Exit Strategy

We therefore offer the following broad conclusions on the pilot project:

Conclusions

- The pilot has been highly successful in terms of learning and providing a baseline for further interventions. However, the project has not produced data on the added value of local food and local supply chains. This is something that needs to be taken forward in order that it is possible to assess the benefits and include such requirements in procurement practices.
- However, in order to take this work forward there will be a requirement for considerably more support in terms of financial underpinning and encouraging behavioural and culture change. The sector and the sustainable food hub model are starting from a low base but there are good opportunities to grow the sector.
- One of the major barriers is the current procurement system and the emphasis on price as opposed to a full cost accounting methodology. Within the current procurement framework there is scope to support more local growers and many of the existing barriers are cultural and based on established practices. New Welsh Government legislation and support will help resolve some of these, but it should be acknowledged that this will take time.
- It should also be acknowledged that the sector is very under resourced and often relies heavily on the goodwill of part time hub staff and growers who are holding down multiple jobs.
- The horticulture sector in Wales needs to be considered within the wider context of agriculture. There are substantial differences between the traditional Welsh farm which specialises in meat products and grazing, and the highly intense agroecological practices associated with small scale growers. The forthcoming Sustainable Farming Scheme (SFS) presents an opportunity to bridge this divide between horticulture and traditional forms of farming.
- There can be no doubt that increasing demand for fresh fruit and vegetables through public procurement could play a very significant part in kick-starting a new approach to horticulture. Building on the findings of the pilot project subsequent phases would be more sustainable if they were based on hyper local models which forge relationships within a small locality. Such local networks can then benefit from the support of regional and national networks.
- To summarise the conclusions, the pilot project has shown great potential and has highlighted issues that can only be really addressed on a national and in some cases international basis.

Recommendation including Exit Strategy

In this section we set out two key recommendations for SF&G and the wide partnership to consider:

- The pilot project has been a very valuable start in looking at how public procurement can further develop the horticultural sector in Wales. Building on this success, action will be required on a number of different levels:
 - Every effort should be made to ensure that the work started in the two Food Hubs (Foothold and Cultivate) continues, strengthening the number and diversity of growers, and increasing the connections with procurement teams across all part of the public sector.
 - The role of the Steering Group for the pilot project should be adapted to reflect wider aims of networking, collaboration, and sharing resources and skills. It will be vital that there is a mechanism for sharing learning and maintaining momentum.
 - This national and regional networking needs to influence future policy development and be considered as an integral and vital part of the Well-being of Future Generations (Wales) Act 2015, and particularly the 7 Goals and 5 Ways of Working. Political advocacy should be a key component of any further developmental work.
 - And within a wider context, more should be done to increase awareness of the issues raised by the pilot project. There are many challenges identified and overcoming many of these will be highly dependent on creating awareness of true value of local produce.
- Any substantial changes to horticulture in Wales and the involvement of public procurement will take time, and in that respect, it will be important to:
 - Set out a clear roadmap that will lead to transformative and sustainable changes.
 - Measure and celebrate success through a tightly defined and transparent Monitoring and Evaluation framework.
- Training and education has been hi-lighted as a key issue moving forward. This is in terms of skills gaps across the board (e.g. procurement, growing, marketing, biodiversity, using fresh ingredients etc.) and it is vital that this element is developed. This could also potentially provide a source of income if a range of courses/training packages are developed and accredited.

Annex 1: Inception Meeting Notes 5th July

Present:

Gary Mitchell: SF & G
Alison Sheffield: SF & G
Rob Owen: BRO
Sue Rice: BRO

Social Farms and Gardens

GM set out the structure and main work undertaken by SF and G across the UK and specifically in Wales, where they have a greater focus on health and wellbeing issues. They are a member organisation and support small scale community food growing, mainly horticulturists operating on less than 5Ha. They also run the Community Land Advisory Service (CLAS) in Wales, and this is funded directly through the WG.

BRO's Team

RO outlined the project team and who would undertake each stage. It was noted that Angharad was already engaged by SF and G to undertake some mapping work on orchards, but there was scope for some of this to support this project evaluation.

Background

GM explained the background to the project and how it came about. The project is the culmination of a long discussion with Welsh Government and the National Procurement Service (NPS).

Another consultant (Iain Cox from EcoStudio) has been appointed to support the sustainable development aspect of the project.

There are several food organisations with different perspectives who are interested in the outcome of this project - and they have formed a Steering Group, so that the results can be shared widely and have the most impact.

The project will have some implications for WG policy, particularly in relation of the Sustainable Farming Scheme (SFS). At the moment, agricultural support hinders farmers from going into horticulture, and there is a need for this to shift in

order for more farmers to work closely with communities to produce local food. This is a significant policy agenda.

Pilot locations

The two pilots are:

Cultivate in Powys, [Home - Cultivate](#) GM has string links here.

Foodhold Cymru in Carmarthenshire. [Home | Foodhold Cymru](#) This was chosen because the County had already made strides in terms of the Foundational Economy.

The two pilot areas will be meeting in each other's areas, with the next meeting in Newtown on the w/c the 11th July. This is too soon for BRO to attend, but the next meeting will be in Carmarthen and this is likely to be in September.

Both pilots have made some early links with potential public sector buyers, eg. Primary School, Local College, Country Park. There are also some initial links with the Hywel Dda Health Board.

Project Funding

The project is not ENRaW funded, rather it is another RDP pot. They do not have to use the WEFO on-line system but do have to liaise with the RPW team. The difficulty here is getting answers to fairly easy questions!

There was a 12 month delay in getting final approval from the WG - and this has had a massive impact on what they can achieve now. From the evaluation's point of view therefore we will need to look at potential and direction of travel, rather than measuring tangible outputs achieved since the timeframe is way too short.

Steering Group meetings

These are likely to be September 2022, Jan and March 2023. BRO will need to attend these.

It was noted that there are other similar projects operating at the moment, eg Tyfu Dyfi and the Sustainable Food Hubs work being undertaken by PLANED.

Other key organisations include:

- Open Food Network <https://www.sustainablefoodplaces.org/wales/>
- Tyfu Cymru, INSERT LANTRA WEBSITE
- Sustainable Food Places Wales <https://www.sustainablefoodplaces.org/wales/>
- Growing Real Food for Nutrition (GRFFN) <https://grffn.org>

(It will be important for BRO to understand how the different stakeholders are involved and what contribution they can make to this project).

Next Steps

AS will:

- Share background information and reports, contacts etc

BRO will, by the end of July:

- Undertake background scoping, particularly on the barriers to procurement
- Draft a ToC Logic Model
- Develop initial Research Tools.

It was noted that this is a short piece of work and the time available for the evaluation needs to be very focussed. The ultimate aim will be to produce a useful advocacy document which can be used to influence policy.

BRO to arrange its own team meeting after 18th July

BRO and SF & G to meet late July to sign-off Logic Model and agree future milestones.

Annex 2: Original Delivery Plan

| | Activities | End Date |
|----|--|----------|
| 1 | Confirmation of two Hub host organisations | Sep-21 |
| 2 | Secure premises for Hubs | Sep-21 |
| 3 | Recruitment of Hub Managers | Oct-21 |
| 4 | Employment of SFP Officer in Carmarthenshire | Jan-22 |
| 5 | Confirmation of capital equipment priorities for expenditure. | Oct-21 |
| 6 | Press releases (launch, end q2, end q4 (interim evaluation), end q6, evaluation report, key learning doc). Including infographics. | Jun-23 |
| 7 | Recruit evaluators | Sep-21 |
| 8 | Establish project communication assets. | Aug-21 |
| 9 | Delivery partner Roles and Responsibilities | Sep-21 |
| 10 | Steering group Terms of Reference | Sep-21 |
| 11 | Steering group meetings x8 | May-23 |
| 12 | Relationship building - Hubs and growers/producers | Jun-23 |
| 13 | Relationship building - Hubs and customers | Jun-23 |
| 14 | Translation of all resources and assets | Jun-23 |
| 15 | Induction process for two new hubs. | Dec-21 |
| 16 | Fit out Hubs with required technology and storage/infrastructure. | Dec-21 |
| 17 | Adaptations to OFN platform | Mar-23 |
| 18 | Hub staff training (food standards) | Jan-22 |
| 19 | Hub staff training (business skills) | Jan-23 |
| 20 | Certification of Food Hubs | Jan-22 |

| | | |
|----|---|--------|
| 21 | Peer to peer visits for Hubs x2 | Aug-22 |
| 22 | Public information events x2 | Feb-22 |
| 23 | Written training aids/case studies x 5 | Mar-23 |
| 24 | Quarterly claims to Welsh Govt | Jun-23 |
| 25 | Capital investments for growers | Jan-23 |
| 26 | Producer/grower face to face networking training events x2 | Sep-22 |
| 27 | Virtual producer/grower training events x4 | Sep-22 |
| 28 | Video training aids/case studies x2 | Mar-23 |
| 29 | Project partner training | Mar-23 |
| 30 | Measuring added value of this pilot | Dec-22 |
| 31 | Other training for stakeholders and beneficiaries | Dec-22 |
| 32 | Interim evaluation | Jun-22 |
| 33 | Exit strategy review (review of business case, future funding opportunities etc.) | Jun-23 |
| 34 | Key Learning Document | Jun-23 |
| 34 | Final evaluation | Jun-23 |

Annex 3: Logic Model

| Social Farms and Gardens Food Hubs Pilot Logic Model | | | | |
|---|--|---|---|--|
| Objectives: <ul style="list-style-type: none"> ➤ <i>To pilot the use of food hubs to enable the public sector to buy food locally</i> | | | | |
| RESOURCES | ACTIVITIES | OUTPUTS | | OUTCOMES |
| | | TARGETS | WIDER OUTPUTS | |
| <ul style="list-style-type: none"> ➤ RDP funding ➤ SFG staff ➤ Partner organisations ➤ Steering group ➤ Existing research ➤ BRO evaluation team | <ul style="list-style-type: none"> ➤ Pilot Hubs <ul style="list-style-type: none"> • Hub set up • Hub operation ➤ Communication ➤ Evaluation ➤ Governance ➤ Project Management ➤ Training | <ul style="list-style-type: none"> ➤ 1 co-operative action supported ➤ 1 feasibility study completed ➤ 20 holdings / beneficiaries supported ➤ 16 information dissemination actions / promotional and / or marketing actions undertaken ➤ 2.6 jobs created ➤ 1.48 jobs safeguarded ➤ 2 networks established ➤ 30 participants in training ➤ 50 stakeholders engaged ➤ 8.5 training days ➤ £22,432 public expenditure for training / skills | <ul style="list-style-type: none"> ➤ Two new food hubs operating and able to sell into the market ➤ Advocacy document ➤ Training delivered ➤ Training materials and assets ➤ Events delivered ➤ Publicity materials and assets ➤ Effective and sustainable partnership established ➤ Data on: <ul style="list-style-type: none"> • nutritional value of food produced • Impact hubs' ways of working has on supporting WFGA / correlation with current / future WG legislation / policy • Carbon / environmental impact | <ul style="list-style-type: none"> ➤ Evidence base available to prove that the public sector can procure efficiently from local producers using methods that benefit the natural environment and prosperity |
| 1 Cross Cutting Themes: | | 2 Assumptions | | 3 External Factors |
| <ul style="list-style-type: none"> ➤ Sustainable Development ➤ Wellbeing of Future Generations ➤ Poverty and Exclusion ➤ Welsh Language | | <ul style="list-style-type: none"> ➤ Commitment of the partner organisation ➤ Willingness and ability of the public sector to engage ➤ Growers can produce enough food | | <ul style="list-style-type: none"> ➤ Further Covid outbreak ➤ Adverse weather ➤ Changes in legislation ➤ Change in partner staff ➤ Rise in energy costs ➤ Increased pressure on LA budgets to make savings ➤ New WG claims system |

Annex 4: SF&G Monitoring Frameworks

Project Targets

| What | How | Who | When | Feb 23 Update | May 23 Update |
|---------------------------------------|---|----------------------------------|---------------------|--|---|
| 1 co-operative action supported | Evidence of project start | Alison | May 22 | NA | Completed |
| 1 feasibility study completed | Documents produced <ul style="list-style-type: none"> - 6 case studies - 1 advocacy document | OFN BRO P'ship | March 23 June 23 | Draft of advocacy doc prepared | Advocacy document completed |
| 20 holdings / beneficiaries supported | 10 growers engaged in project and part of local network in each region. Interactions recorded on spreadsheet. Sign up and attendance list of networking meetings. | Augusta/Nick Augusta/Nick | March 23 | Sign-up sheets being used for events. List of suppliers maintained. | 14 - target not quite met. This is a result of fewer growers existing in the areas and due to short nature of project it was not possible to support any new/diversifying farmers. In addition, because demand has been |

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| | | | | | <p>low, there hasn't been the ability to attract growers into the project through purchasing their products.</p> <p>Increasing the number of growers has been identified as a key future need in the Advocacy Document.</p> <p>A project extension is being sought to continue grower engagement activity to end Sept 2023.</p> |
| 16 information dissemination actions / promotional and / or marketing actions undertaken | Project comms log | Alison/Meggie (all external comms to go through RNW) Delivery partners also to record activity. | June 23 | Comms log maintained | Completed |
| 2.6 jobs created | Contracts of new project staff | Alison | July 22 | NA | Completed |

| | | | | | |
|-----------------------------|--|--|---------|--|---|
| 1.48 jobs safeguarded | Contracts of existing project staff | Alison | July 22 | NA | Completed |
| 2 networks established | See above - two growers networks. Evidence of meetings attended. | Augusta/Nick | May 23 | Need to monitor this more closely. AS to speak to Nick and Augusta about monitoring grower interactions. | Completed |
| 30 participants in training | Central training tracker (internal and external). Attendance lists from training events. (Feedback forms from training sessions) | All delivery staff | June 23 | Tracker being used. Feedback and sign in sheets collected. | 71 - this includes delivery staff and other stakeholders as well as growers and college students. |
| 50 stakeholders engaged | Stakeholder engagement tracker | All delivery staff and steering group. | June 23 | Slight confusion about tracker in Carms - now back in action. Interactions recorded separately. | Exceeded. |
| 8.5 training days | See above (training tracker) - pre- | Alison to collate evidence | June 23 | As above | Target unlikely to be met. This is due to the |

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|--|----------------------------|--------|---------|-----------------|--|
| | planned in events calendar | | | | impracticality of organising full day training sessions. Two hour sessions have proved to be the most beneficial for growers particularly at busy times of the growing season. 10 training sessions have been completed to date with a further 4 scheduled. |
| £22,432 public expenditure for training / skills | Budget | Alison | June 23 | Being recorded. | Currently at £11,493 with a few training events still to be delivered. Likely to remain under budget due to training being delivered in alternative ways, eg through visit to Castell Howell with no charge involved and online (OFN training). Expenditure has been invested in |

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|--|---|-----------------------|---------------------------------------|--|--|
| | | | | | legacy publicity and expenses for staff travel to training and other events. |
| Two new food hubs operating and able to sell into the market | <ul style="list-style-type: none"> Hub visits Evidence of sales into the market | BRO Hubs | Ongoing | Initial hub visits completed | 4 visits by BRO Cultivate £2,665.26 Foothold £1,456.40 |
| Advocacy document | <ul style="list-style-type: none"> Document completed Document launched / disseminated | BRO / Partnership | March / April 2023 May / June 2023 | Initial draft completed | Completed |
| Training delivered | <ul style="list-style-type: none"> Observations / attendance at events Attendance lists Photographs Feedback from participants (survey) | BRO Organisers | Ongoing | 2 steering group mtgs. Attended Feedback form written | Completed Evidence and feedback form tbc |
| Training materials and assets | <ul style="list-style-type: none"> Evidence of materials produced | Partnership | Ongoing | Not really maintained as yet... Will consider legacy training resources. | Not achieved due to the nature of the training delivered and its bespoke content |
| Events delivered | <ul style="list-style-type: none"> Observations / attendance at events | BRO Organisers | Ongoing | To be discussed further | Sign in sheets completed and photos available. |

| | | | | | |
|---|--|---|-----------------------------|---|--|
| | <ul style="list-style-type: none"> Attendance lists Photographs Feedback from participants (comments) | | | | |
| Publicity materials and assets | <ul style="list-style-type: none"> Evidence of materials produced | | Ongoing | See above - comms. | Copies of social media posts and other publicity material collated |
| Effective and sustainable partnership established | <ul style="list-style-type: none"> Stakeholder interviews Attendance at steering group Exit strategy produced | BRO Partnership | Ongoing / End of project | Interviews 80% completed 2 SG mtgs. Attended Exit strategy will be included in evaluation report | Completed |
| ➤ Data on: <ul style="list-style-type: none"> nutritional value of food produced Impact hubs' ways of working has on supporting WFGA / correlation with current / future WG | <ul style="list-style-type: none"> BRIX refractometer comparative values Scientific analysis (product and soils) Three stage assessment of hub activity | External consultants Steering Group BRO | Ongoing January 2023 | Agreed that this will be 2 visits to each hub plus additional interviews. Mapping of policy has been undertaken as part of advocacy document | Completed |

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|---|--|--|--|--|--|
| legislation / policy <ul style="list-style-type: none"> • Carbon and environmental impact | <ul style="list-style-type: none"> • Hub analysis of processes and procedures (tbd) • Mapping of WG existing and emerging policy • Mapping of growing locations and methods | | | | |
|---|--|--|--|--|--|

Delivery Plan updates

| A.1 | Hub Set up | Due Date | Oct 22 | Feb 23 | May 23 |
|------------|--|-----------------|---------------|---|--|
| 1 | Confirmation of two hub host organisations | Sept 21 | | | |
| 2 | Secure premises for hubs | Sept 21 | | | |
| 3 | Recruit hub managers | Oct 21 | | | |
| 4 | Employment of sustainable SFP officer in Carmarthenshire | Jan 22 | | | |
| 5 | Confirmation of capital equipment for expenditure | Oct 21 | | Awaiting WG approval of lease hire tender process. Some capital purchased directly. | Approved end January 2023 |
| 15 | Induction process for two new hubs | Dec 21 | | | |
| 16 | Fit out hubs with required technology and storage / infrastructure | Dec 21 | | More active spending from Cultivate. | As in Feb - but gradually getting there! |
| A.2 | Hub Operation | Due Date | Oct 22 | Feb 23 | May 23 |
| 17 | Adaptions to OFN platform | May 23 | | Ongoing - get update from Bethan | As per Feb. |
| 12 | Relationship building hubs and growers / producers | June 23 | | | |
| 13 | Relationship building hubs and customers | June 23 | | | |
| 21 | Peer to peer visits for hubs x2 | Aug 22 | | | |
| 25 | Capital investment for growers | Jan 23 | | See above. | Ongoing but actively underway. |
| 20 | Certification of food hubs | Jan 22 | | Not as essential as forecast. | Alison to check update. |

| B. | Communication | Due Date | Oct 22 | Feb 23 | May 23 |
|-----------|---|-----------------|------------------------------|--|---|
| 6 | Press releases | June 23 | | Some press done. Not as much as ideal. | PR planned for closure event. As to work with Graham to consider options for advocacy document. |
| 8 | Establish project communication assets | Aug 21 | | | |
| 22 | Public information events x2 | Feb 22 | | Christmas meal at Pembrey was good. Powys planning food summit for April. | 1 event planned by each Hub in May. |
| 14 | Translation of all resources and assets | June 23 | On track, processes in place | | |
| 23 | Written training aids / case studies x5 | | | Appointed Jo from OFN to lead and this is underway. | One case study developed - under review |
| 28 | Video training aids / case studies x2 | March 23 | | Filming underway - final approval of narrative scheduled for mid-Feb. | Final filming underway - on track for on time completion. |
| C. | Evaluation | Due Date | Oct 22 | Feb 23 | May 23 |
| 7 | Recruit evaluators | Sept 21 | BRO appointed Sept 22 | | |
| 30 | Measuring added value of this pilot | Dec 22 | Consultants working on this | Carbon measuring consultants appointed. Nutrient density - not as intense as hoped but some completed. | Finalising added data collection with events planned for carbon. Final reports being written for sustainability, more |

| | | | | | |
|-----------|---|-----------------|---------------|--|--|
| | | | | Eco Studios underway. | nutrient density testing approved. |
| 32 | Interim evaluation | June 22 | | Feb 23 as working draft | |
| 33 | Exit strategy review of business case, future funding opportunities | June 23 | | To be included in evaluation report | |
| 34 | Key learning (advocacy) document | June 23 | | Draft produced | Nearly there!! |
| 35 | Final evaluation | June 23 | | On track | As above. |
| | Dissemination of Advocacy Document | June 23 | | Final event planning underway | All on track for final dissemination event. |
| D. | Governance | Due Date | Oct 22 | Feb 23 | May 23 |
| 10 | Steering group terms of reference | Sept 21 | | | |
| 11 | Steering group meetings x 8 | May 23 | | Ongoing. | Final meeting scheduled 9 May. Partners invited to Senedd event. |
| E. | Project Management | Due Date | Oct 22 | Feb 23 | May 23 |
| 9 | Delivery partner roles and responsibilities | Sept 21 | | | |
| 24 | Quarterly claims to WG | June 23 | | On track. Up to date. | As before although issue with system accepting simplified staff costs... |
| F. | Training | Due Date | Oct 22 | Feb 23 | May 23 |
| 18 | Hub staff training food standards | Jan 22 | | See above but some training underway. | Training completed. |
| 19 | Hub staff training business skills | Jan 23 | | Support set up with DTA - slow moving. | Support being delivered |

| | | | | | |
|----|--|----------|--|---|--|
| 26 | Producer / grower face to face networking training events x2 | Sept 22 | | Events proposed around the new equipment that will be available focused on upskilling and upscaling | Events delivered / scheduled |
| 27 | Virtual producer training events x4 | Sept 22 | | Alternative events proposed instead. | Although carbon footprinting workshop will be virtual. |
| 29 | Project partner training | March 23 | | Visit to Castell Howell on 31 st Jan. | Complete |
| 31 | Other training for stakeholders and beneficiaries | Dec 22 | | Participation in WRFFC (Nov 22). We have a full training schedule planned which if fully delivered will exceed numbers for training hours and participants. | Complete |

Annex 5: Site Visits to 2 Hubs

Site Visit to Cultivate, Newtown

Background

Richard and Nick set out some background to Cultivate and their involvement in the Sustainable Food Hubs Pilot project led by Social Farms and Gardens.

Gary Mitchell has a long connection with Cultivate and therefore it made sense to involve them in the work. Richard now leads Cultivate, whilst Nick is one of the newly appointed Sustainable Food Partnership Officers, covering Powys.



Cultivate now has 1 FT member of staff (Richard) and 6 PT officers, whose hours vary from 4 hours a week for some driving, through to 2 or 3 days a week.

Cultivate is located on the outskirts of Newtown in a converted bungalow and with about 2 acres of land. There are two other charities on site a Men's Shed and a bike repair service. There is also a food distribution set up on site, but they are soon to relocate. There are several 'mini plots' which residents can use for a small fee of £10.00 a year, along with larger growing areas and poly tunnels. There are about 40 volunteers.



They have also been involved on previous projects such as pathways to farming and so these experiences can be built upon.

Growers

For the pilot project they have brought together a number of growers:

John - an NRW officer who's family has over 300 acres. He has managed to persuade his family to use a small part of the farm for horticulture. So this is field scale growing and includes carrots, potatoes etc.

Richard - is a grower in his own right and specialises in soft fruit. He has in the past grown a wider range of produce and can also include additional items if needed such as squash.

Lisa - who's specialising in micro greens and mushrooms

Emma - providing a variety of produce.



Cultivate also now has an aeroponics unit and this can produce large quantities of micro greens quickly and to a consistent standard. Here the loss of the deli is a blow, so some effort will be needed to find an alternative outlet. The increasing cost of electricity is also going to be a challenge.

Buyers

Cultivate did benefit from having close connections with a deli, but unfortunately this has now closed. For the pilot project they have identified a number of potential buyers:

The adjacent college, both in terms of its refectory and the cooking courses that they run. This is an obvious connection and the partnership is seen as corporate social responsibility, so there is no need for procurement.

They have been looking at selling to 2 local schools and whilst this is still on the cards, it will take longer to crack this. There are 6 primary schools and 2 secondary schools in Newtown and so a long term goal could be to sell to all of them. The challenge will be to impact the centrally set menu for school. It is interesting to note that Cultivate have enough orchard capacity to supply apples to every school in Powys.



In the meantime, there is the strong possibility of selling to the County Hall canteen and this could be useful in terms of increasing awareness of the value of local food. The head of procurement in Powys, Sian, is helping them in trying to break down some of these barriers.

Care Homes is another option, but one of the challenges here is the very low daily allowance for purchasing food for residents - which can be as low as £4.30 a day per resident!

The Health Board is also a hard one to tackle because of the size of the organisation and the fact that they are in a period of flux, so this makes it harder to engage.

They have considered meals on wheels, but one factor is the distances involved in getting the food to the various locations. Powys is a very rural area so it involves substantial transport costs.

Wider factors

There are a number of other factors worth mentioning. The Gaia seed initiative which is about protecting the integrity of seed quality and the nutritional value of the food being produced can help growers establish new crops of varieties best

suited to local conditions. However, they will only provide new growers with one seed type in the first year as a trial.

Outside of the public sector they have a good relationship with Swsen who produce chutneys and preserves.

Challenges

The pilot is being run within a very tight timescale, so they need to think about what comes next and whether there will be future funding to build on what they will achieve in this phase.



The challenge will be how to scale up - and maybe the best way to do this is a step by step approach i.e. achieve a breakthrough, consolidate and then push for another breakthrough. In this way you can begin to align supply and demand.

It will be important that the selection criteria for procurement takes into account social as well as purely economic factors. Organisations like Cultivate provide very important social benefits through the use of volunteers, education visits etc so these need to be taken into account.

There is good support within Powys and there is every chance that they can build up supply and open up new public sector procurement.

What has been achieved?

The have successfully set up the OFN system for their growers, although this is not yet in use due to the current lack of produce. However, as crops begin to be harvested the site is ready to go. The team have been trialling the use of wholesale prices published by DEFRA every week to set the pricing structure for their growers, adding 25% to cover Hub costs. This seems to be working and ensures a fair price for both growers and buyers.

Their team of growers have remained constant and they are interested in setting up a food co-op following the end of the project, and a bid has been submitted to the Shared Prosperity Fund for a sustainable food project to help support this ambition. They are looking to gain help from Cwmpass to achieve this, and learn from others such as Puffin Produce in Pembrokeshire.

Their contract to supply one of the primary schools in Newtown has worked well, with weekly purchases of 75kg of potatoes. They have had good feedback on the quality of their supplies and are looking to expand their supply to include other schools in the area. They have a produce day planned where they are inviting all of the school and care home cooks along with the Council's Procurement Officer to come along to the College and take part in a seasonal vegetable tasting session where recipes and ideas will be shared. They are hoping to attract more buyers through this session, although they still need to be mindful of remaining under the £5K procurement threshold.

Barriers for the Future

Schools

The team would love to be able to expand their supply of schools. However, if they want to try and supply schools outside of the Newtown area, the limitations of the Council contract would require them to be able to supply schools as far away as Machynlleth. Given the transport costs this would price them out of the market, and would be impossible for such a small group to achieve logistically. This is something for them to consider for the future, and whether development of the 20 Minute Neighbourhoods idea, and the creation of 'hyper local' hubs with local farms supplying local schools is a possibility. This would be similar to the model they have currently created with local farms and producers supplying their school in Newtown, but it is something for them to consider. Another alternative would be to either expand or replicate what they have in Newtown to other places such as Welshpool or Llanidloes.

SALSA Accreditation

The team have recently developed a range of apple juices for sale, and have been working towards SALSA (Safe And Local Supplier Approval) accreditation. This accreditation is aimed at smaller food producers and suppliers and looks at all aspects of production from hygiene to labelling and has proved to be a challenge to achieve. However, they are slowly ticking off all of the requirements and hope

to be able to achieve accreditation in the near future. The accreditation will allow them to expand the places where they can sell their juice and provides a level of comfort and security to buyers knowing that it have been produced safely.

Whilst aimed at smaller producers and suppliers, the practicalities of achieving this accreditation for such a small organisation were impossible within the timescales of the project. The costs are high and probably favour larger suppliers, but the team have learned many lessons in the process!

What Happens Next

Once the project is finished the team are keen to build on their achievements. They will work with their existing suppliers to help them form a cooperative and would like to increase the numbers involved, both in terms of existing growers producing more and additional growers getting involved.

They would like to explore potential for expansion, and the possible options for this, either opening other offices elsewhere in Powys or encouraging others to replicate what they are doing in Newtown. Either way, if they are to consider supplying additional schools they need to expand their capacity and geographical coverage.

During the course of the project they have planted 1800 fruit trees and bushes including 800 apple and pear trees. This development of a community orchard could see up to 80,000 tonnes of fruit in future years and the team are considering establishing a community 'fruit day' to distribute supply from the orchard and provide an opportunity for others to share their crops.

Whatever shape the future takes, the project has provided Cultivate with the opportunity to take the next steps towards developing a sustainable community food network within the Newtown area, and further afield.

Site Visit to Foothold Cymru, Llanelli

Background

Foothold Cymru are well established in the local area having been running for a number of years. Once quite a large organisation, they are now more streamlined and focused on providing services to their local community including a community shop, a subsidised food box delivery (£4 for 10 items or £5 for 13/14 items), community fridge, cookery classes, craft classes, as well as a school uniform and general clothing exchange.

Helen Evans formerly worked at Foothold in a procurement advisory position, and was asked to deliver the food hub pilot project. She works alongside Augusta, who is the local Sustainable Food Partnership Officer covering Carmarthenshire.



Foothold are currently in the process of moving from their current site in The Stebonheath Centre, an old school building, to a newer, and less expensive to run, building in the Trostre area of the town.

They operate a community garden near to the new location where they grow produce with volunteers to supplement their community shop and food boxes



As part of the Swansea Bay Wellness Centre development this site is being extended by the development company as part of their CSR responsibilities. This garden has been registered with SFG.



Growers

Augusta had signed up ten growers as part of the project, one of whom is a local farmer who is currently using one field for food growing. Two of the original ten dropped out, but Augusta managed to replace these.

The food they expect to be able to supply includes mainly root veg along with kale, leeks and cabbage. Helen expects quality to be the main issue with the produce their growers can supply. She knows that some buyers are having issues with the quality of produce supplied by one of the local wholesalers and returning deliveries.

Buyers

Working with the local Council they have signed up to supply Pembrey Country Park restaurant with produce. However, over the winter months this will be for product to the value of £25 a week, rising to a maximum of £50 during the peak summer months.

They have also negotiated to supply the Awel Tywi Care Home in Llandeilo, although due to procurement restrictions this will be for between £90 and £140 pw. These restrictions will ensure that the level of supply does not exceed £5,000 a year.

One other potential buyer they are trying to engage with is Coleg Sir Gâr and in particular their catering course. Students run a restaurant on site and already grow some of their own produce but Foothold could potentially provide them with quality local produce as well. This could be linked to an education element helping students to learn about the nutritional value of the food they cook and the benefits of using local.

Wider issues

Ultimately success for Foothold would be a commercially viable operation supplying food into the public sector including schools and the local health board. This may require some compromise on price from growers, but they also need to prove that they can meet quality standards, whilst providing food of a higher nutritional value with fewer food miles.

However, Helen is aware that some local schools are struggling to get enough staff to be able to operate school canteens and in some instances are unable to provide any hot meals for pupils, and this may impact their ability to engage with schools as part of the project.

Developing a local Carmarthenshire food brand would also help raising awareness with buyers and consumers about the benefits of buying local and supporting local growers.

Challenges

Matching growers and buyers expectations in relation to quality and price may be tricky. There will be some areas where they are unable to compete with big wholesalers, such a bulk prices for potatoes where one local wholesaler charges only £0.54 per kilo.

One of the ways they are considering to try and overcome the £5,000 procurement restriction in supplying into the public sector is to work with a wholesaler such as Castell Howell, who are based in Carmarthenshire. They already have contracts with the public sector and like to encourage and work with local suppliers. Helen would like to discuss the possibility of asking Castell Howell to identify a small local school that they currently supply, that Foothold could realistically supply all or part of their food requirements. Castell Howell could deal with all of the contractual elements, whilst Foothold would be able to manage quality control and delivery.

What has been achieved?

Since our first visit to Foothold they have been working hard to develop their food supply and have developed a good relationship with the Council, who are very supportive of what they are trying to do.

They now deliver to the local Welsh medium secondary school, along with a local primary school, a local care home and Pembrey Country Park café. All are more than happy with the quality of the produce supplied and the catering manager of the local care home thinks the switch to using locally produce is the best decision they ever made. They find that there is less food wastage, which in turn cuts down on preparation time, and they would like to be able to continue sourcing their food locally beyond the end of the project.

Barriers for the future

Procurement

The biggest barrier to being able to continue supplying their customers in the future is procurement. Due to the current procurement rules, the combined value of all the produce they have supplied to their customers has remained under the £5,000 procurement limit.

Currently fresh fruit and vegetables are procured on a county wide basis. Whilst they have been developing their relationship with Castell Howell, they do not currently hold the contract with Carmarthenshire Council for the supply of such food. The current supplier is out of contract but is operating on a rolling month by month basis with the Council for the time being.

When the contract is put up for renewal, without an emphasis on local sourcing of produce there will be no incentive for the larger wholesale companies to work with small networks of suppliers, such as that set up by Foothold. Given the scale of County wide contracts, small scale suppliers will be unable to bid themselves and need to be able to add value to larger scale bids.

Supply

There is still a disparity between the basic food requested by customers and that supplied by growers. The All Wales Menu doesn't allow for seasonality and cooks / chefs aren't always happy with proposed substitutions such as curly kale instead of cabbage. However, most orders are only in the region of £50 per week from each customer so there isn't currently enough demand to encourage suppliers to grow more or change their crops.

However, it should be noted that feedback from customers has been good with all happy with the quality of the food provided and the speed with which it can be delivered.

What happens next?

Foothold are looking at ways to be able to carry on supplying their existing customers beyond the end of the project.

They are considering ways of increasing demand to allow growers to produce more or different crops with the comfort of a guaranteed market. Ideas include using some of the food themselves either through supplying ready-made meals to customers or developing a fruit and veg box service.

However, being able to work with one of the larger wholesale companies such as Castell Howell will be very important. They are able to bid for and win the larger public sector contracts and would be able to provide local growers with a guaranteed income. They also have the buying capacity to supplement any gaps in

local supply from other sources, and the capacity to use over supply in their own ready-made meals.

In the meantime, they will continue to operate within the existing £5,000 limit until they reach the maximum value. They will continue to encourage new growers to participate, although without the potential for larger scale supply through alternative procurement methods (via a larger wholesaler or in an ability to supply themselves beyond the current £5,000 limit) there is little incentive for more growers to get involved. Additionally many of the small growers can gain a higher price for their produce at farmers markets than they can achieve through wholesale distribution.

However, the ambition remains to attract more growers and more land to the production of local fruit and vegetables. They have learned valuable lessons from the pilot including the logistical difficulties of dealing with growers from across the county. Going forward it might be beneficial to develop more hyper local hubs possibly with a central grower that deals with the organisational and administrative elements that can supply local public sector customers. They would like to work with the Council to develop a 3 year plan to increase the percentage of local produce in the public sector system, as this would give them a base to start from in order to increase supply to meet a known demand.

Annex 6: Feedback Form

[Event Title]






[Event Date]

Thank you for participating in this event. Your feedback will help us:

- Improve the delivery of future events
- Monitor and evaluate the impact of our Procurement Food Hubs project
- Design future events/training that are useful, relevant and accessible

Feedback will remain anonymous. Summaries of feedback (without information on any individuals) may be shared across the partnership and with our funders. For more information about how the partnership are managing data visit please email wales@farmgarden.org.uk

| | | | |
|---|-----|-----------|----|
| What were you hoping for from attending this event? | | | |
| Did you achieve this through attending? | Yes | Partially | No |
| Please comment on your answer | | | |

| | | | | | |
|---|--|--|---|--|--|
| Please rate... |  |  |  |  |  |
| | Poor | Not good | Adequate | Good | Excellent |
| Your confidence to deliver training before the sessions. | | | | | |
| Your confidence to deliver training after the sessions. | | | | | |
| The trainer(s) who delivered the sessions | | | | | |
| The content of the sessions | | | | | |
| Please give some detail on the reasons for your answers | | | | | |

| | | | | | |
|--|--|--|--|--|--|
| What was the most valuable thing you have learnt from the session? | | | | | |
| Is there any other feedback you would like to provide? E.g. pre-event information, speakers, format | | | | | |

Working with partners from [Open Food Network](#), [Cultivate](#), [Development Trusts Association Wales](#) and [Foothold Cymru](#), we aim to demonstrate that the public sector **CAN** procure efficiently from local producers using methods that benefit the natural environment and local prosperity.

This project has received funding through the Welsh Government Rural Communities - Rural Development Programme 2014-2020, which is funded by the European Agricultural Fund for Rural Development and the Welsh Government to pilot two new procurement food hubs in Carmarthenshire and North Powys.






[Teitl y Digwyddiad]
[Dyddiad y digwyddiad]

Diolch am gymryd rhan yn y digwyddiad hwn. Bydd eich sylwadau yn ein helpu:

- - Gwella'r drefn o gyflwyno digwyddiadau i'r dyfodol
- - Monitro a gwerthuso effaith ein prosiect Hybiau Bwyd Caffael
- - Dylunio digwyddiadau/hyfforddiant yn y dyfodol sy'n ddefnyddiol, yn berthnasol ac yn hygyrch

Bydd yr adborth yn aros yn ddienw. Gellir rhannu crynodebau o adborth (heb wybodaeth am unrhyw unigolion) ar draws y bartneriaeth a gyda'n cyllidwyr. I gael rhagor o wybodaeth am sut mae'r bartneriaeth yn rheoli data, ebostiwch wales@farmgarden.org.uk

| | | | |
|---|----|-----------|----|
| Beth oeddech chi'n gobeithio amdano o fynychu'r digwyddiad hwn? | | | |
| Wnaethoch chi gyflawni hyn trwy fynychu? | Ie | Rhywfaint | Na |
| Rhowch sylw ar eich ateb | | | |

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|---|---|---|--|---|---|
| Cyfradd os gwelwch yn dda... |  |  |  |  |  |
| | Gwael | Ddim yn dda | Digonol | Da | Gwych |
| Eich hyder i ddarparu hyfforddiant cyn y sesiynau. | | | | | |
| Eich hyder i ddarparu hyfforddiant ar ôl y sesiynau. | | | | | |
| Yr hyfforddwr/hyfforddwr a gyflwynodd y sesiynau | | | | | |
| Cynnwys y sesiynau | | | | | |
| Rhowch ychydig o fanylion am y rhesymau dros eich atebion | | | | | |

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| Beth oedd y peth mwyaf gwerthfawr rwyd ti wedi ei ddysgu o'r sesiwn? | |
| Oes unrhyw adborth arall yr hoffech chi ei ddarparu? E.e. gwybodaeth cyn y digwyddiad, siaradwyr, fformat | |

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Annex 7: Analysis of Stakeholder Interviews

| SF&G Food Hubs (Carms/Powys) Interview Analysis | |
|---|---|
| Perspective/role | Notes |
| Procurer (Carms CC) | Leading on Carms food related work, including procurement |
| Procurer (Powys - college catering dept, Health/safety/hygiene technician) | Buys the supplies for the catering dept each week |
| Procurer | Written feedback |
| Procurer (Powys CC Principal Catering Manager) | In charge of catering across Powys |
| Projects and programmes Officer (Catering) - Carms | Answered the topic guide questions by email and not interview |
| Supplier | supplies the Carms hub |
| Supplier | Planning to supply to Powys Hub |
| Supplier | supplies to Carms hub |
| Steering Group | Specialist in food projects/nutrition/food tech etc. |
| Steering Group | Designer of the data collection framework (sustainability experts) |
| Steering Group | Food officer for Carms, chef, Chair of Carms food partnership |
| Powys Pilot | Manager at Cultivate |
| Powys Pilot | Sustainable Food Places officer for Powys |
| Carmarthenshire Pilot | Manager (part time) |
| Carmarthenshire Pilot | Sustainable Food Places Officer |
| Wholesaler | Large scale purchaser of foodstuffs. Supply most of the public sector catering teams/premises |

Key themes to emerge were grouped under the following headings:

(All quotes are not attributed).

Benefits of selling to public sector/how your organisation can benefit?

The responses have been thematically analysed and grouped under the following headings:

1. Supply
2. Resilience
3. Health
4. Environmental
5. Economic
6. Social Value

1. Supply

- Ultimately increases local supply of produce.
- Much nicer food/better quality.

2. Resilience

- Decreases reliance on food brought in from other countries.
- Could result in increased resilience in the supply of local food if more growers 'joined forces' - they can 'cover' for each other when some growers' crops fail.

3. Health

- Community health benefits - increased cohesion, increased fruit and veg consumption perhaps.
- Indications are that locally produced fresh food could have higher nutrient density.

4. Environmental

- Reduction in carbon footprint (shorter supply chains)
- Better quality soil

5. Economic

- Local economies prosper.

- Increased local employment (growers, processing jobs, pickers etc).
- Eventually should lead to more guaranteed orders from local suppliers - that would provide economic sustainability through contract purchase.
- Economies of scale eventually.

6.Social Value

- Increasing community cohesion and resilience.
- Local producers have more autonomy and not only selling to large. organisations like supermarkets that can demand 'perfect' produce.

What will the hubs achieve?

In the short term:

The following themes emerged:

Lessons learnt/Insights gained

- Learning lessons from the pilot.
- Have a greater understanding of the costs/issues there will be with supply and demand/what the supply chain could look like.
- Potential to provide some objective evidence based on measures of social value (e.g., de-carb, nutritional wealth of local produce).
- Establishing that there is a market in the public sector for home grown produce.

Connections established

- Grower's networks in each area.
- Has already built some strong connections and this can continue.
- Opened doors for future discussions.

"Needs scale and then the sky is the limit"

Food Hub associate

"Switching to this [buying local produce from the hub] was the best decision I've ever made!"

Care home chef

Awareness raising

- Raising awareness of the issues involved (supply, demand, carbon footprint etc).
- Raising the awareness of children about local produce, healthy eating etc. (e.g., children have been surprised that carrots have green “stuff” at the top).

Behaviour/culture change

- Encouraging children to try better tasting veg.
- Getting people used to different produce that they wouldn't normally order (e.g., rainbow chard).
- Introducing new ways of working.

What the hubs can achieve in the longer term:

(These were generally articulated as ‘hopes’ rather than predictions).

Economic

- Better economic prospects for local people.
- Competitive prices maybe?

Supply

- Good supply of local produce, pulled together in one place.
- Genetic diversity of produce.

Health

- Much better quality/nutritious/tasty food.

Learning

- Upskilled growers.

“it’s a bit chicken and egg right now - supply levels don’t meet demand but the public sector isn’t currently utilising the available supply anyway”

Local grower

SCOT Analysis

Strengths

Supply

- Having a network of growers contributing produce means gluts/shortages can be mitigated.
- Has potential to deliver economies of scale.
- Has the potential to aggregate supply, and to set own standards and measures of sustainability and quality.

Economic

- Grower's network generates ideas (e.g., veg box schemes in school holidays).

Misc.

- The Pilot has provided a physical base and an online platform that can remain..
- It's an agile and dynamic way of working.

"We get to take students to see where produce comes from"

College catering course provider

Challenges:

"Being part of this industry is currently so hard - cost is key even though people say they want to do the right thing"

Small sale local grower

"Public sector menus MUST become seasonal - they need updating to reflect seasonal and local "

Local Chef

Economic

- Needs more investment.
- Prices need to be stable to attract large scale custom (e.g., wholesalers that would distribute to public sector outlets)..
- Needs commercial grounding/viability if it is to succeed
- Can't afford staff and even if we could, we can't get them.
- Growers often have to take on other jobs to make ends meet.
- Need to ensure other local businesses aren't put out of business because of the hubs..
- How to scale effectively (*"it can't work at this size"*).
- Transport and distribution will be a huge challenge.

[With costs producers would have to charge in the current system], 'this can feel like pushing water uphill in the current climate'

Wholesaler

Public sector related

- Time, budget and staffing challenges being faced by the public sector.
- Overcoming procurement guidelines and thresholds (*"this is going to take a long old time"*)..
- Getting demand = supply and visa versa for the public sector will be hard.
- Public sector catering depts need ready prepared food due to time and staff constraints (would need central processing locations)

[we] "need to crack the nut of how you get higher quality fruit and veg that has all the social value, social benefits etc. to everyone - not just for 'niche' people that can afford it"

Food Hub Associate (Carms)

Behaviour

- Needs long term cultural change on all sides (public sector, farmers, consumers etc).

Misc

- Distribution logistics “you could end up with delivery vans hurtling round the Welsh countryside with a just a few bits of veg on board.”
- “Even the hubs don’t want to take all we can provide.”
- The pilot may not have done enough to ensure its continuation because of the short timescale of it in terms of growing seasons etc.

“in reality, there has to be a demand for ‘locally grown’ otherwise it;’s just a “should do” thing”

Wholesaler

“We use Puffin Potatoes because their brand is commercially valued, the infrastructure is already in place and most importantly they are BRC (food hygiene standard) accredited so the audit standard is robust for our customers”

Wholesaler

“For us to buy from local producers they would all need to be BRC accredited”

Wholesaler

Opportunities Economic

- Hoping it could provide competitive prices at some point.
- Promoting to supermarkets.
- Expanding outside public sector to private market (e.g., restaurants).
- Equipment ‘library’ to save all growers having to buy their own.
- Establishing processing facilities (cleaning and prepping veg and possibly meal making for the cook/chill/reheat market in schools/hospitals etc).
- Growers sharing resources (equipment or staff for example).
- Diversifying into different produce.
- To create a hub ‘brand’ that people can recognise and trust.

“brands like ‘Puffin Potatoes’ which bring lots of potato suppliers under ‘one roof’ so it’s a reliable and trusted brand now”

Wholesaler

"a national menu change would mean growers can be asked to grow what is actually needed by schools, care homes and hospitals for example"

Local small scale grower

Public Sector

- To influence policy change in local procurement.
- Facilitate the delivery of public sector catering training perhaps.
- Educating public sector on 'full cost accounting' so they don't buy simply on price (tricky in current climate)

"securing public sector contracts would give a huge incentive to growers to expand and change what they produce"

Food hub associate

"Would like to continue with the pilot for another year so we can grow it organically within other homes and schools [in our area]"

Pilot participant (Carms)

Education/training

- Public supported agriculture -try to get educational programmes happening in schools - e.g., mandatory farm visits.
- Getting cooking in schools back on the mandatory curriculum.
- To inform and educate the buyers.
- Diversifying into accredited training.
- Training for growers.

Community and collaboration

- More collaborative working.

- Could ultimately be community-led.

Threats

Economic

- Current financial situation (produce currently too expensive).
- Lack of funding for the required length of time until the industry can grow and become sustainable.
- The availability of cheap, highly processed food.
- Lack of money for equipment (e.g., to help process the produce).
- Lack of funds to 'ramp up' growing is likely to mean supply won't be increased fast enough.

Supply/demand

- Lack of supply in the short and medium term (until growing can be 'scaled up') may deter public sector from procuring.
- Lack of orders from public sector.
- Small scale nature of the pilots, and their short timeframe may not be enough to demonstrate potential for further investment.
- Inability to scale up quickly enough - for many reasons.

Behaviour/culture

- Lack of understanding of what is needed.

Misc

- Lack of infrastructure (e.g., certain crops need particular land, skills, equipment etc).
- Lack of skills.
- The decision not to pursue SALSA (Safe and Local Supplier Approval) accreditation could be detrimental.

Benefits to your organisation specifically

- It's helping shape the food system in my area.
- Good to be part of the steering group.
- BRIX training has been really informative.
- It's provided us with a 'window' into things like care homes and schools to see what they are facing too.
- Networking with other growers.
- The hub has helped us with our own growing.

- We've had better tasting more nutrient dense food.
- The pilot proves it can be done to some extent.

"it would mean we could actually GET this produce locally without having to source from outside Wales and outside the UK"

Wholesaler

Thoughts on increasing resilience to food shortages/increased prices

- Making sure we can process food locally in a way the customers need it processed (e.g., clean/prepare/cook/chill or freeze/deliver/reheat on site).
- Research into adding value to food to increase nutritional value (e.g., fortifying).
- Needs longer term thinking from all sides (WG, farmers, public sector etc.)
- Study other models - like Puffin Potatoes and replicate.
- WG needs to look at a menu change pilot (so schools etc. can use more seasonal produce for a start).
- Diversifying the food that we produce.
- More work to encourage less waste.

"Is it functioning optimally? Seems to just be a place for 'catching up' but it should be more than that, particularly as people are paid to attend"

SF&G Steering Group participant

Steering group

"This all HAS to be made convenient (e.g. good supply chains, reliable transport and logistics, ready prepared produce, 'ready meals' e.g.- convenience is what we are used to now and that isn't going anywhere!"

SF&G Steering Group participant

Conclusion

A total of 16 interviews were conducted (plus one email response to the questions). After this number of interviews, there was a 'saturation point' where no new information was forthcoming.

There were also a number of informal conversations at the Wales Real Food and Farming Conference (November 2022) that have informed these findings.

The general feeling was that this type of hub and 'breaking into' the public procurement arena were good things to do, but that it would need extensive (and longer term) up front funding, policy change and continued support to ensure it could develop.

There was also collective agreement that producing locally is exactly what is needed as part of a sustainable food system, but that there were significant challenges in terms of supply/demand, transport, logistics etc. However, it must be acknowledged that the interviews were carried out with 'like-minded' people who support the principal in the first place.

Some emerging academic behaviour change evidence currently being carried has concluded that "convenience is here to stay" and this aligns with what the Public Sector interviewees articulated. There is a clear and demonstrable need for fruit and veg to be prepared in readiness for use by catering services. This could simply be cleaning and chopping, but they also state there will be increased demand for pre-packed meals that can be sent directly to the schools. This is already happening in the Cwm Taf Health Board footprint and discussions are underway for similar activity in Carmarthen.

The growers all articulated a need for support to get them 'up and running' so they can produce collaboratively and in greater quantity. The Puffin Potatoes model was cited here. This organisation report now having a productive business model working as a consortium of potato growers. This is something that could be explored with other produce perhaps.

Concerns were frequently raised in terms of how this model could be sustained during the time that it will take to:

- Revise procurement processes.
- Overcome purchasing decisions being made on price alone (i.e., will take some time for Local Authorities, hospitals etc. to move to full cost accounting, particularly in this current climate.
- Bring increased supply in line with increased demand - this will be a "juggling act" in the short term.
- Encourage long term funding support from Welsh Government
- Promote behaviour change.
- Educate public sector, children, farmers, growers etc. on what is needed to move Wales to a more resilient food space.

One interviewee from the Local Authority (catering team) did articulate they would like to continue this pilot work for another year in order to “grow it”. Overall, with both catering departments in both Local Authority areas, there was definitely a genuine desire from those already ‘subscribed’ for this to continue and grow.

From a commercial buyers’ perspective, a leading wholesaler to the public sector is currently spending in excess of £230k per annum on locally grown potatoes (from Puffin) and would like to buy more locally grown produce but feels there are many things that would need to change before that would be possible. Sited were issues around supply, price, transport, responsiveness to changes in demand, logistics and in particular that the demand for locally grown does not appear to be a main driver as of yet, at least in their opinion.