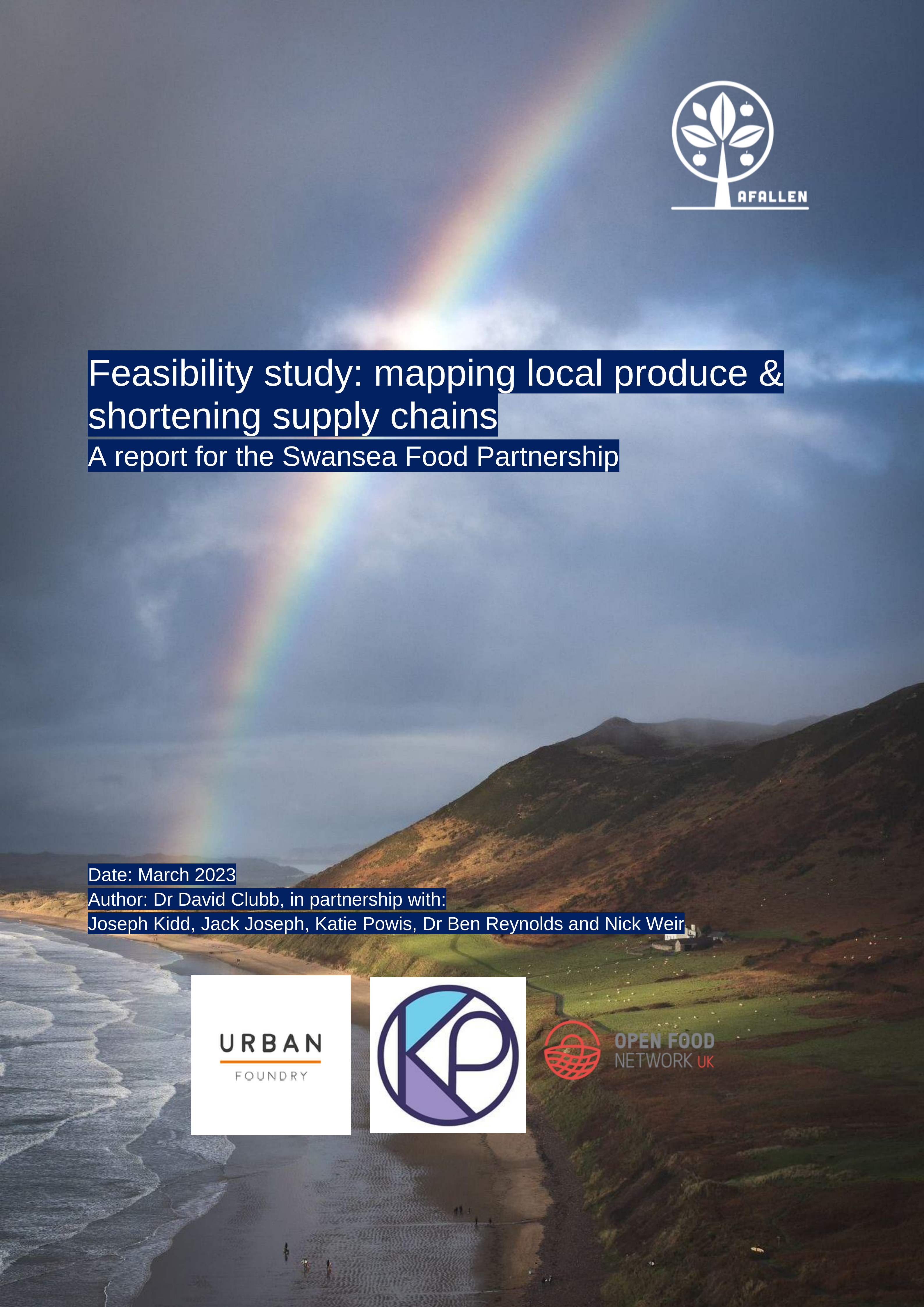


Feasibility study: mapping local produce & shortening supply chains

A report for the Swansea Food Partnership

Date: March 2023

Author: Dr David Clubb, in partnership with:
Joseph Kidd, Jack Joseph, Katie Powis, Dr Ben Reynolds and Nick Weir

Version	Date	Reviewer(s)	Remarks
Template and structure	05/06/22		
Early draft	14/09/22	Jack Joseph	Multiple comments/suggestions provided, most of which were incorporated for the next draft.
Second draft	06/10/22	Jack Joseph	Multiple comments and suggestions provided, most of which were incorporated for the next draft
Third draft	7/11/22	Jack Joseph	Multiple comments and suggestions provided, most of which were incorporated for the next draft
Final draft	10/02/23	Jack Joseph	

Note

The contents of this report do not necessarily reflect the views of the Swansea Food Partnership, or the funders of the project. Neither Afallen nor any person or company acting on its behalf is responsible for the use that may be made of the information contained in this report.

Afallen recognises the funding and support for this project that has been provided by:

- European Agricultural Fund for Rural Development (EAFRD)
- Swansea Council's Economic Development and Funding team
- Swansea Council's Economic Recovery Fund
- Swansea Food Partnership (SFP)
- Welsh Government (WG)

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, and supported by Swansea Rural Development Partnership at Swansea Council. Funding has been awarded from Swansea Council Economic Recovery Fund to capture the urban wards.

Table of contents

List of abbreviations

Abbreviation	Name	References
DTC	Direct to Consumer	Literature
EAFRD	European Agricultural Fund for Rural Development	Website
OFN	The Open Food Network	Website and Facebook
RDP	Rural Development Programme	Website
SBFLAG	Swansea Bay Fisheries Local Action Group	Website
SFP	Swansea Food Partnership	Website and Instagram
SRDP	Swansea Rural Development Partnership	Facebook page
WG	Welsh Government	Website
WRN	Wales Rural Network	Website

Key messages

- The Swansea Council area has thriving local food production communities although conventional food supplies make up the vast majority of food used in the county. The people and communities of Swansea have the potential to increase local food production and use, which in turn could lead to a range of wider benefits to local economic multipliers, health and environmental outcomes
- Regional food wholesalers and distributors described their keen appetite to develop more local food suppliers, as long as they could fill the necessary 'niche' for each supplier
- Feedback from interviews and surveys demonstrates strong support for local food, and a wide variety of ideas on how to increase local supply and use
- Urban and rural audiences are distinct in a number of ways, and the data demonstrates the value in considering a different approach to both. However, the desire for more vendors of locally produced food was expressed uniformly by respondents from both rural and urban areas
- Mumbles is an example of a district that can boast some success in local food provision, with facilities such as butcher, baker, fishmonger, greengrocer and delicatessens. This could offer some suggestions for other districts within the county to consider, and the area could also act as an anchor for further food linkages across the city and county

Executive summaries and recommendations

There is evidence that Swansea City and County is establishing itself as a food destination. The landscape and growing infrastructure, offers a diverse range of local produce to the Swansea population and to visitors.

Rural Swansea is known for its strong agricultural roots. There have been some new entries into the rural farming community on the outskirts of Swansea and on the Gower Peninsula.

The pandemic has highlighted the importance of shopping for local food, and there are a number of other drivers demonstrating a potentially larger demand for produce sourced more locally.

Issues common to rural and urban communities

The overall context for local food production and use is positive and improving, with a growing awareness of the benefits of short supply chains and local involvement. Many UK and Wales-wide organisations and projects exist that are aligned with the objectives of the SFP to strengthen local food supply chains.

From the perspective of complementary markets, the urban and rural areas of Swansea form excellent counterparts, with primary production from rural areas in principle able to be absorbed by end users and food and drink manufacturers in the urban areas, keeping a large proportion of the value within Swansea Council boundaries.

A significant proportion of respondents to the survey (more than a fifth of rural and more than a third of urban) stated that they selected places to eat based on the use or availability of local produce. This suggests a commercial imperative for cafes, restaurants and hotels, and could be a useful tool to support more use of local produce, helping retain value within Swansea.

Overall recommendations

- Both urban and rural audiences indicated their desire for more farmers' markets or local food shops, although the preference was different for each constituency. This suggests that one priority for local business support should be directed towards new retail ventures, or supporting the growth of existing ones
- Integrate food destination projects within the wider issues of local food supply and tourism
- Future food project timelines are built around major existing events in order to maximise the potential participation of (particularly rural) communities
- Consider future businesses regionally rather than locally to lessen cross-border issues associated with area-based funding pots
- Use good practice and new digital tools to improve decision-making and promotion of farmers' markets
- Identify, and participate in, niche celebratory 'days' (such as National Laverbread Day) to highlight local produce
- Investigate whether the UK Seafood Innovation Fund could be used to support local marine supply or processing activities. Building the research and evidence case for shellfish to play a role in mitigating coastal flooding, or low-carbon protein production, could provide a unique opportunity for a niche local industry
- A strategic approach to capturing value would incorporate more local value chains, such as encouraging the development of more food processing capacity, including abattoirs
- The development of a movement to provide 'farm to fork' or local supper clubs could prove beneficial in capturing more value and supporting local producers
- Householders themselves hold considerable power in how the food chain responds, for example, becoming aware of which restaurants offer seasonal menus can be a driver to establishments that offer more local produce, supporting a virtual circle of success for those restaurants or cafes that emphasise their local provenance. This suggests that raising awareness of the benefits of local food should form a component of local food activism
- Local innovation should be encouraged and replicated where appropriate. For example, local WhatsApp groups have demonstrated success in forging links

between local chefs and business owners, with latest availability of food being messaged to businesses, and allowing a simple and quick way to order. Workshops may be an effective way of championing good practice in using modern tools to reduce supply chain barriers and improve information flow

- Access to land is an issue which regularly arises; a dedicated directory highlighting the local opportunity to rent land could be helpful
- CSAs are a particular point of academic and civil society interest, and although they are a relatively small component of overall food use, should be a component of an ongoing food network support activity given the level of local activity and the wider social benefits of their activities

Rural executive summary

The majority of the data we have for rural food production within the county takes place in Gower. The rural parts of the county are characterised by agriculture and tourism, aspects which are often highly complementary in business development and diversification. For example, many Gower-based businesses have capitalised on this with offerings of farm business products or services to holidaymakers.

A recent academic study highlights the potential tensions between food tourism and local food supply (1). The report highlights the need to integrate local food supply chains within a wider movement to create sustainable food tourism by linking with other economic sectors. The rural areas of Swansea are in a good position to forge these links, as agriculture is embedded within the business and social networks of the area. Collaboration between agriculture, food and tourism will be key to realising the maximum benefits of food-related tourism.

The rural population of the Swansea City and County area is comparatively low (12% of the total population), and this presented particular challenges with obtaining specific rural feedback.

The information obtained from rural survey participants has provided rich data on the current preferences of householders and businesses with regard to local food production and supply, as well as suggestions of things that could help to increase both. Appendix 1 contains the raw data with all responses. The following are the key outcomes.

1. The food facility most wanted was a local farm food shop or farmer market (25% of respondents). The next most popular choices were a local meat market or butcher, more CSAs or local growing options, and more food festivals or events (8% for each selection)
2. The most-requested method of accessing local food was via a local produce shop or supermarket (39% of respondents), followed by a local produce market (30%) and CSA (21%)
3. Most respondents (75%) do not consider local provenance when deciding their choice of restaurant. However just over a fifth (21%) of respondents do consider this, suggesting that there is a modest competitive advantage to advertising or marketing these aspects for cafes or restaurants
4. The vast majority of respondents (97%) shop for local food, varying from seldom (12%) to usually (10%). The biggest cohort shop for local food often (42%)

5. The largest cohort of respondents (42%) identified supporting the local economy as the main reason for shopping locally. However, sustainability (30%), and the ‘provenance or quality’ of local food (22%) were also strong factors
6. Respondents had mixed views about the meaning of ‘local’ as pertaining to food, with 31% describing ‘local’ as Swansea County, 30% picking south Wales, 25% identifying local as their neighbourhood and 13% considering Wales as local
7. The average weekly spend on local food was most commonly reported as £11-30; however, 43% of respondents reported spending more than £30 per week, indicating that there is a good market for ‘premium’ products produced locally
8. The favourite reported local food shop or brand was Cae Tân CSA (14% of respondents), with 11% of respondents selecting the Murton farm shop
9. The dominant barrier in finding local food was the difficulty in getting everything in one place (40% of respondents). Other factors included inconvenient opening hours (11%), lack of accessibility (19%) and not being able to buy directly from the producer (13%)
10. Producers cited a number of things that could help them, with the most popular being to incentivise or require large food users to facilitate local producers. Communal equipment (such as shared transport, food hub, commercial business allotments etc) was seen as highly desirable, as was financial support for equipment

Urban executive summary

With much of the primary food production in Swansea City and County taking place in rural areas, the urban areas nonetheless host considerable activity in secondary processing, in drinks manufacture, and also in small-scale primary production, including through CSAs. Urban areas host 88% of the population of the county and therefore represent an extremely important end-user market for food producers and manufacturers.

Swansea Market is an important ‘anchor’ for the local urban food supply chain. Swansea Council will be exploring the idea of running an online service to generate more sales from Swansea Market and to give the consumer an easier way to shop for local produce.

The questionnaires produced the following headline messages:

1. One in six respondents bought more than 50% of their food from local producers
2. The top four suggestions for increasing the amount of produce bought locally included:
    a. More local produce shops (30% of respondents)
    b. Opportunity to purchase direct from farmers (15% of respondents)
    c. Online ordering facility for local produce (15% of respondents)
    d. More local produce events and markets (14% of respondents)
3. The food facility most wanted was a local farm food shop or farmer market (37% of respondents). The next most popular choices were local shops selling local produce (12%), and food festivals (9%)
4. Current preferences for accessing local food included local produce markets, shops or supermarkets (46%); Swansea Market (16%); and online ordering for home delivery (13%)
5. 36% of respondents said that the availability of local produce was a factor in selecting restaurants. This proportion was higher than the rural cohort, suggesting

that there are strong commercial reasons for cafes and restaurants to want to highlight their support for local provenance food

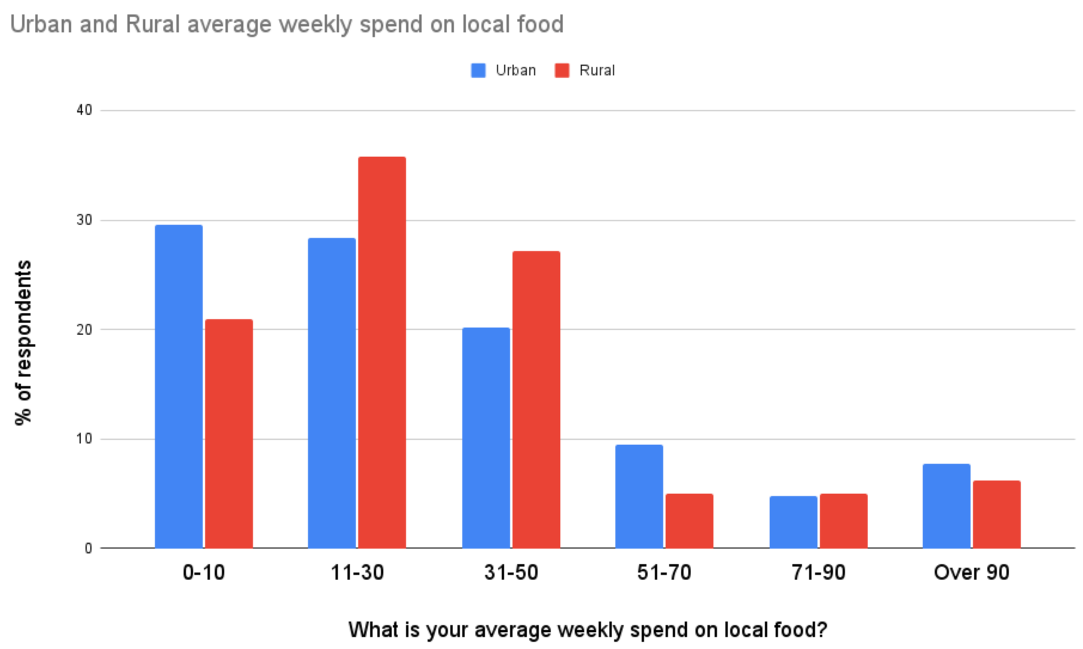
6. As with rural respondents, the biggest cohort of urban respondents (42%) identified supporting the local economy as the main reason for shopping locally, with sustainability (34%) and ‘provenance or quality’ of local food (21%) also being strong factors
7. The most commonly reported average weekly spend on local food was £0-10. 42% of respondents estimated their average weekly spend on local food as more than £30
8. The top four local food shops or brands were:
    a. Swansea Market (14% of respondents)
    b. Dunvant Farm Shop (11% of respondents)
    c. FarmCo (8% of respondents)
    d. Shepherds Fruit and Veg (8% of respondents)
9. When asked about barriers to finding local food, the biggest cohort (36%) cited the difficulty of being able to get everything in one place.
10. Food sellers described a number of preferred options for supporting their businesses, including:
    a. Improved marketing and promotion
    b. Contracts with schools, hospitals etc
    c. Have Swansea chefs providing cookery demonstrations and food tasting at local and Wales-wide events

Points of note regarding urban and rural respondents

There are a number of interesting points of similarity or contrast between the urban and rural respondents.

Issue	Note
What food facility would you like to see that is not currently provided?	Whilst top of the list for both urban and rural respondents was farm shop or farmers’ market, this was the choice of 25% of rural and 37% of urban respondents.
How would you prefer to access local food?	The above preferences were nearly reversed when the question was asked about preference for accessing local food, with a local produce shop or supermarket being selected by 39% of rural respondents, but only 26% of urban respondents.
Do you use specific restaurants for locally sourced menus?	36% of urban respondents and 21% of rural respondents answered ‘yes’ to this question.
How often do you shop for locally produced food?	Nearly twice as many rural (54%) respondents shopped ‘usually’ or ‘often’ in this way, compared with urban (29%)
Why is shopping for local produce important to you?	The responses to this question were very similar for both rural and urban respondents; top responses were to support local economy and jobs, and to improve sustainability.
What is your favourite local food shop	These responses were very different, indicating that the locality of the

or brand?	vendor or brand is extremely important to people. Top urban responses were Swansea Market and Dunvant Farm Shop. Top rural responses were Cae Tân CSA and Murton Farm Shop.
What barriers do you experience in finding local food?	Both rural and urban respondents indicated that the challenge of obtaining everything in one place was the main barrier to procuring more local produce



The proportion of respondents reporting weekly average spend on local food, by urban or rural classification

Introduction and context

Swansea City is establishing itself as an exciting up and coming food destination. Our unique landscape and growing infrastructure offers a diverse range of great local produce to the Swansea population.

Rural Swansea is known for its strong agricultural roots, and we have recently seen a resurgence in exciting new farming businesses on the outskirts of Swansea and on the Gower Peninsula. The pandemic has highlighted the importance of shopping for local food, and we are now seeing a much larger demand for produce sourced more locally.

The outcome of the work was to enable food businesses and people across the city and county of Swansea to connect and progress work towards building sustainable food systems at a coordinated level, rather than relying on the progress of individuals and lone businesses.

Because of the nature of the project funding, all project components were carried out being mindful of the need to separate rural from urban issues. The rural wards covered are:

- Gower
- Mawr (included in the tender specification but deprecated by boundary changes, so in practice has become incorporated into Clydach, Llangyfelach and Pontarddulais)
- Pennard
- Pontarddulais
- Fairwood
- Llangyfelach
- Bishopston
- Penclawdd

For the purposes of this project, other wards within the county are classified as urban (see Figure 1). 88% of the county's population is classed as urban.

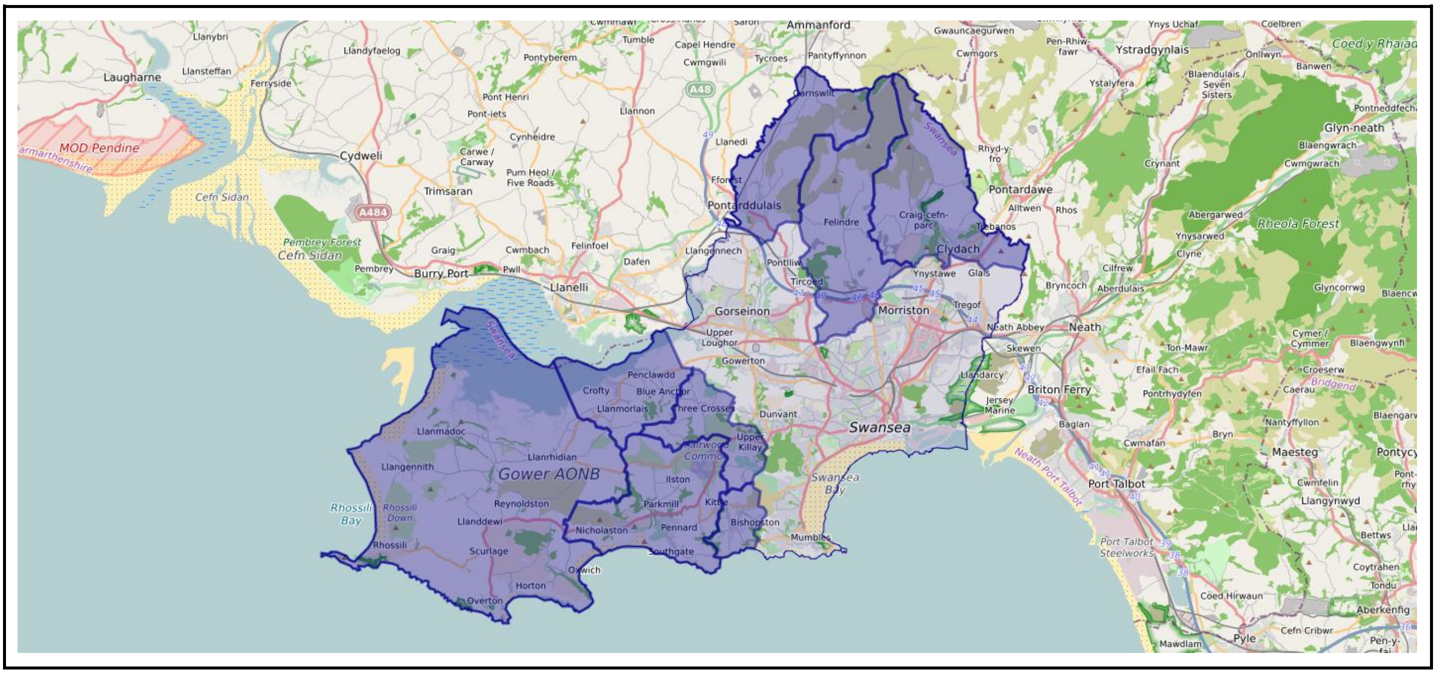


Figure 1: Map showing the split between rural and urban wards in Swansea City and County, with the rural wards coloured in dark blue

Key outcomes, and our approach to delivering them, are as follows:

Outcome	**Our deliverable**
To produce a feasibility Study with tangible results that will inform future work on the theme of local food and shortening of supply chains, with the view to unlocking further investment.	This report
To map local produce in Swansea (rural and urban areas) to identify opportunities for new start-ups and existing businesses.	A spreadsheet of publicly accessible data
To identify supply chains in use locally and regionally; and any gaps in the chain where there is a significant demand for something that is unavailable or a remainder of supply (food waste) that could be utilised.	Chapter: 'Local and regional supply chains'
To explore the needs of food producers, food businesses including hospitality and tourism sector, and consumers in order to strengthen supply at a local level to place Swansea on the map as a food destination.	Chapter: 'Swansea as a food destination'
Identify new supply routes, and gaps for development for business growth for our rural and urban food producers.	Chapter: 'Local and regional supply chains'
Increase and improve better access to and knowledge about locally produced foods.	Provision of a publicly available spreadsheet
Identify opportunities for networking and opportunities with B2B (business to business) and B2C (business to consumer), resulting in connected food communities	Chapter 'Local and regional supply chains'
Explore the potential for other avenues to market e.g., produce vending machines.	Chapter: 'Other avenues to market'
Identify options for securing sustainable food systems	Chapter 'Local and regional supply chains'
Provide recommendations for shortening supply chains	Executive summary and recommendations

National context

The Covid-19 pandemic has demonstrated the relative fragility of global supply chains and helped emphasise the importance of local food networks. Many organisations and projects are active in supporting local food production and sales, and future project bids should make use of these activities and connections, even if their current focus does not include Swansea.

The Covid-19 pandemic had a short-term positive impact on specialist food sales; by Q4 of 2021, specialist food sales had reached a decade-high level. However sales in the sector have subsequently declined, and the most recent figures show a decline to 1% below pre-pandemic levels by September 2022. This suggests that the 'spike' in interest in local food during the pandemic cannot be relied upon and that a strategic long-term approach is necessary to build capacity in the sector.

Policy in Wales is broadly supportive of locally produced food. Public Health Wales has reported on the interconnectedness of food, well-being and environment, and suggests helping establish local resilient food networks (2). This approach is endorsed by Wales Environment Link in a March 2022 position statement that calls for whole system reform to transition to agroecology (3). Wales' leading role in local food activism is recognised by researchers (4).

A meta-study of 30 separate studies undertaken from May 2020 until November 2021 (5) found 'a consistent message and vision' for the UK's food supply from 'local' food movements. The current system is characterised by a lack of resilience due to 'just in time' delivery, economies of scale, centralised structures, and the dominance of supermarket chains in the retail sector. All these issues are compounded by Brexit, that has increased difficulties for food export, and reduced the available labour pool for food production and processing operations.

Some aspects of the existing system are also recognised as challenges by 'traditional' sector stakeholders, with sustainability, food security and health being particularly identified.

This wider context provides fertile ground for continuing development of the local food 'scene' across the UK. Swansea can benefit from this wider 'push', as well as the local clusters of expertise and enthusiasm for local food production and supply.

Finally, food boundaries are porous, and projects aimed at supporting the development and strengthening of supply chains must consider cross-boundary effects. For example, a resident or food producer based in Garnswllt (Swansea City and County) may well have their closest supplier or customer base in Ammanford (Carmarthenshire). **A way to resolve this could be to consider future projects regionally rather than locally to lessen cross-border issues associated with area-based funding pots**.

Cost of living crisis

This project was carried out during a period in which the cost of living became a major issue for large swathes of the population. Energy and food price inflation has rarely left the headlines, and both are likely to be issues for coming years.

Locally produced food can play a role in re-establishing links between people and their local area, and over the medium term, could also support a more affordable food system if small local producers can develop long-term sustainable businesses enabling them to minimise transport costs whilst delivering high quality produce.

However, the benefits of local markets are hard to realise in areas with lower aggregate incomes, as the real cost of producing high quality food is still uncompetitive with mass-production, nominally 'similar' products. The differential is less with 'raw' products such as meat, vegetables and fruit, and these may act as a springboard for additional products to enter local markets.

Further pressure on local food production and sale - particularly in areas of poverty - could arise over the short and medium term as incomes largely stagnate whilst inflation pushes costs higher in a wide range of everyday expenses.

Town or city centre rental costs have not significantly adjusted to demand pressures created firstly by Covid and then by the cost of living crisis, leading to relatively high rents against uncertain customer demand.

The benefits of local food production

Local food production has the potential to reinvigorate local supply chains, linking householders and businesses with producers, thereby retaining skills, money and employment within local economies.

A local food system could require far fewer food kilometres, less processing or refrigeration, and simultaneously help reconnect people with their local environments.

In this report, we describe local food production and supply as demonstrating one or more of the following characteristics:

- A farm to fork approach that reduces the need for 'middleman' handling and consequently improves the freshness of the product, as well as reducing food miles. Much more of the money stays in the local economy[1]
- A local and long-term trusted point of contact for food production who is potentially more responsive to local needs

There are trade-offs with national or global sourcing; for example, national supply may still be able to source UK products and has shorter food miles than global supply chains and may demonstrate advantages of frequency of supply. Global food chains often allow for a greater variety of produce, but introduce greater uncertainty in the ethics of production, and ensure that the bulk of the value for food produce leaves the local community. Greater food miles accrue from food procured further away from the end user.

Responses from producers, sellers and householders

The principal method of obtaining information about local food systems was a series of questionnaires, designed in partnership with the City and County of Swansea. These

[1] In the USA, 90% of the economic benefit from farmer's markets is retained by the producer and local community, compared with 17% local retention for 'normal' food supply and distribution

questionnaires were publicised several times over the summer, by the Swansea Council communications team using their social media platforms, and by the project partners and wider stakeholders.

The respondents were split into two main groups by urban and rural designation, and then by Producer[2], 'Seller'[3] and End user[4].

The questionnaires were also taken to pop-up markets, food events and Swansea Market. These questionnaires were completed in-person.

The questionnaires are available here. The number of responses are as follows.

Urban
- Primary producers: 12 (target 20)
- Secondary producers: 41 (target 30)
- Hospitality: 49 (target 50)
- Supply chains, outlets etc: 32 (target 10)
- Local consumers: 246 (target 200)

Rural
- Primary producers: 37 (target 20)
- Secondary producers: 19 (target 30)
- Hospitality: 28 (target 50)
- Supply chains, outlets etc: 10 (target 10)
- Local consumers: 97 (target 200)

We obtained respondent questionnaire with their postcode, enabling us to ascertain their status as a rural or an urban respondent, according to the postcode look-up to electoral ward (10)

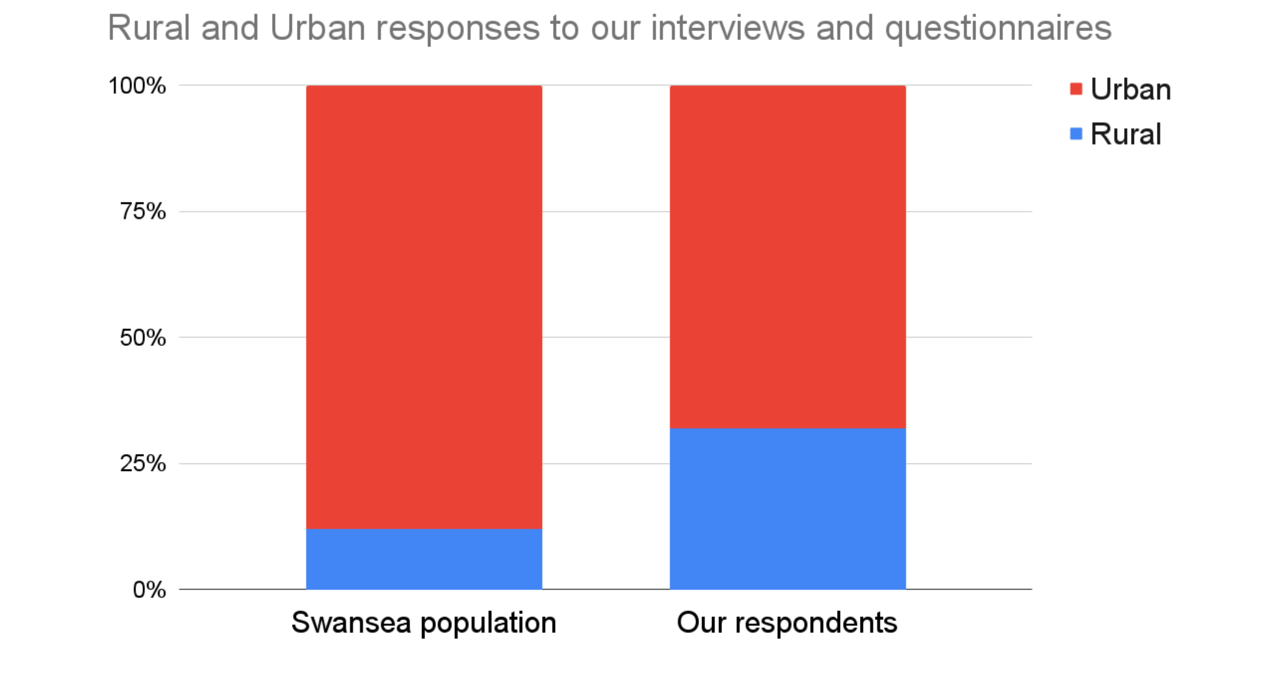
We also obtained a small amount of feedback from people based outside Swansea, but with a strong interest in the food system within the City and County. We classified these according to whether the postcode represented a town or rural area according to the location on openstreetmap.

Rural respondents made up 32% of the total survey respondents. 88% of the population of Swansea City and County lives in urban areas, so the proportion of rural interest in the study was significantly above that which could be expected on a population average. This could be due to our efforts to ensure capture of the rural perspective, or to a greater interest in rural residents and businesses in local food supply, or a mixture of both.

We recommend that future project timelines are built around major events to support engagement with demographics or geographies that have fewer opportunities to engage.

---

[2]Food producers (such as growers, farmers, manufacturers etc)
[3]Aimed at food 'users and sellers' (cafes, pubs, restaurants, hotels, wholesalers, markets etc)
[4]For final end users, such as householders



A comparison of the population of Swansea by urban and rural classification, against the proportion of responses to this study by the same classification

Note that not all respondents answered every question, and some questions allowed multiple selections of answers. The total number of responses for any question can therefore be far fewer, or far greater, than the number of respondents.

The raw data arising from the questionnaires is detailed in Appendix 1.

Face-to-face engagement

A programme of face-to-face engagement was carried out to obtain feedback from householders and traders at various venues and events in Swansea City and County. These engagements used the same questionnaires as the online engagement to ensure consistency. These engagements are summarised in the table below.

Event	Feedback
Swansea Bay Pop Up – 22nd June 2022	• A family friendly food and drink pop up in Singleton Park • We visited during the last week of the pop up so only a small number of traders were left. The contract had just been awarded so we visited at the earliest opportunity once the questionnaires had been signed off • Only one trader was able to take part in the study. Most of the stalls were owned by Creative Hospitality Group so we were directed to HQ. Two traders were from outside of Swansea County. The remaining were either being run by employees (who were unable to answer the questions) or were understandably too busy to take part. • Business names were noted and added to the database to receive the questionnaires digitally. • 1 trader did take part who was keen to see more local traders take part in

	events such as the pop up. The trader wanted to see a shift from national to local offerings in new food venues like the proposed dining experience in phase 2 of Copr Bay Swansea.
	• Focus shifted to interviewing the public. We were able to interview 19 households and individuals. Overarching themes were:
	  ○ Food events in Swansea require more promotion and marketing for them to be successful and well attended
	  ○ More local events selling and promoting local produce in urban and rural communities - not just in the city centre.
	  ○ Would buy local produce if it was accessible and more favourably priced.

Green Recovery Business Conference – 27th June 2022	• Around 300 business people and sustainability professionals from across the city and county, came together in June 2022 to discuss the future of Swansea's green economy.
	• Supported 4theRegion and Castell Howell as a facilitator for 4 sessions in the food sector.
	• Attendees were asked to visit all sectors and debate a question for each. For food the question was *'How could businesses support a more local, sustainable food system?'*
	• Overarching themes were:
	  ○ Restaurants, cafes and hospitality businesses should buy more from local producers and promote the provenance of their menus.
	  ○ Businesses and large organisations must release spare land for community growing.
	  ○ There is a significant opportunity for innovation and R&D in the food sector to create resilience and green jobs.
	  ○ Opportunities for SME Collaboration
	    ▪ Businesses in the hospitality sector invited to co-create a shared project to collaboratively increase the amount of local food on their menus
	    ▪ Connecting local producers with customers in hospitality and retail is a priority, to match what buyers want with what producers can provide
	    ▪ Buyer-supplier events and food fairs.
	    ▪ Creating an easy way for local producers to promote their produce to local customers, e.g., through an online platform.
	    ▪ Raising awareness about the many beneficial impacts of locally produced food, especially regenerative farming - a Swansea-wide communications campaign.
	• More information can be found in the Swansea Green Business Report 2022

Mumbles and Marina Market - 9th and 10th July 2022	• Mumbles Market is held on the second Saturday of each month in Dairy Car Park, Mumbles. Marina Market is held on the second Sunday of each month at Dylan Thomas Square, Swansea Marina. • Variation of traders in food, crafts, arts, jewellery and clothing • Susie Johnston, Market Manager was able to advise, of the food traders,

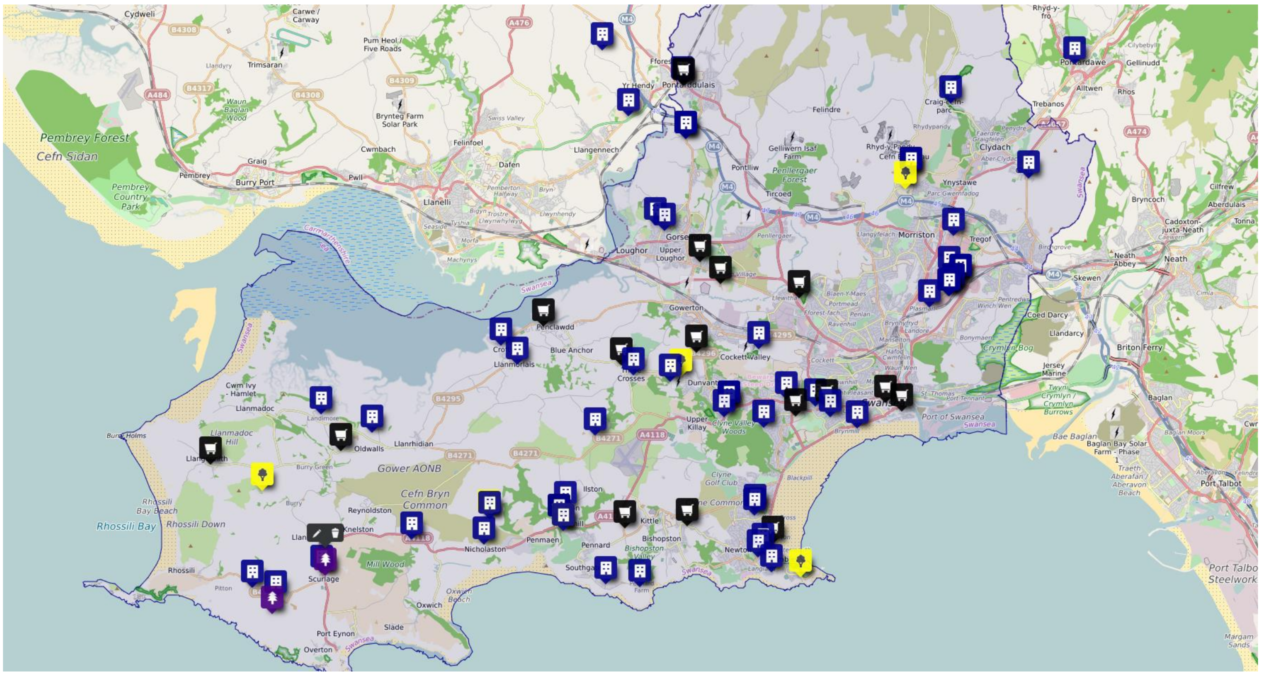
	those who were from Swansea County and therefore eligible to take part in the questionnaire. Many were from outside of the County – for example no farmers in attendance were from Swansea County. • 5 traders were interviewed (who were known to be local). Some declined due to being busy setting up and serving customers but agreed to complete the survey digitally. The survey was circulated by Urban Foundry to all food market traders (across all Uplands, Marina and Mumbles markets) • 46 members of the public were interviewed across Mumbles and Marina Markets
Swansea Indoor Market – 12th August 2022	• The largest indoor market in Wales • Arranged to meet with Darren Cox, Market Supervisor prior to talking to traders. • On discussion with Darren and review of the questionnaire Darren advised that it was unlikely that traders would be able to take time out from trading to complete the questionnaire and recommended I introduce the project and questionnaire to the traders and Darren was to circulate the questionnaire digitally the following Monday (15th August) • The questionnaire went out on 30th August 2022 due to Darren being away from work. • The questionnaire was circulated to 27 traders; we were not individually informed by the traders about whether they had completed the questionnaire

We also obtained information via phone or video conference with the following organisations:

- Lantra
- Castell Howell
- Blas ar fwyd
- Bwyd Abertawe
- Organic Farms and Gardens
- Bic Innovation
- Menter a Busnes
- Cwmpas
- Levercliff
- Monmouthshire Council
- WWF Cymru
- Swansea Council

Forty-nine individuals or organisations were engaged by email correspondence. They are listed in Appendix 2.

Local & regional supply chains



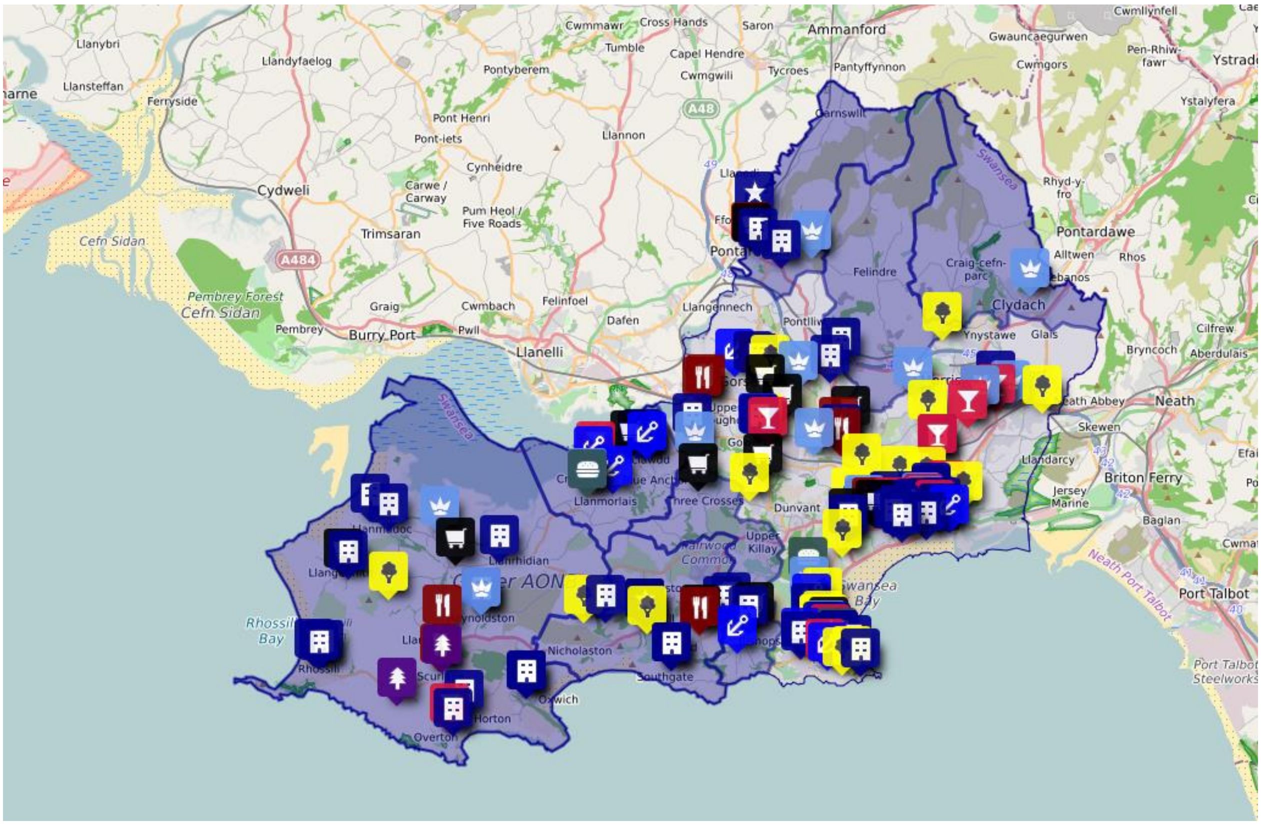
A map of local farms and farm shops, markets and CSAs that were used as the basis for understanding local food supply networks.

Local end users

Swansea has thousands of food-related companies located within the county - there are, for example, 2,343 currently registered on the Swansea City and County food hygiene ratings (11). Swansea also has a local population of nearly 250,000 (12). The current local food suppliers would likely be able to service only a very small portion of the total available market.

The good news is that - in principle - the market is virtually limitless for ambitious local producers or other supply chain participants. A coordinated approach and a long-term strategy could reap significant benefits in local employment and re-location of skilled jobs within the food and drinks sector.

The volume of total potential participants or respondents means that we were not able to capture more than a small fragment of the total for this project. However, we have captured many organisations and participants who are engaged in the concept of local food networks and are therefore of most value to local producers or sellers.



An example of the sort of geographic data on food producers and participants in the supply chain that arose from our mapping exercise.

Understanding local supply chains

Part of Regeneration Swansea's Economic Recovery plan was to explore how we can shorten food supply chains in Swansea by gathering data from primary and secondary food producers, end users and hospitality food businesses. This study captures data from across Swansea’s rural and urban wards to build a case to move towards a local food system.

A food supply chain is the process that a product will go through before reaching the customer. These processes can be complex, especially when food is big business.

Swansea Food Partnership has outlined a basic supply route guide, breaking down the elements of supply.

- Direct Supply
- Local/Regional Supply
- Nationwide Supply
- Worldwide Supply

The current food production system in the western world is now heavily reliant on industrial farming, mass processing and corporate giants to circulate to the masses. It is argued that food production on this scale is a vital part of feeding the nation but there are issues including unhealthy competition leading to questions on business ethics and the quality of food.

This system has its merits, and it is affordable, plenty of choice and provides an incredible amount of food to the population, however, it might not be sustainable long term. The pandemic highlighted that even small changes can affect supply, leaving supermarket shelves empty. Shorter food chains mean a stronger local economy, resilience and thriving local communities.

The definition of local can vary and can depend on the geographical location and infrastructure for that area. When we call a product local it is also important to gain an understanding of what is meant. Do we mean local producers? Or a local supplier. Sometimes a product can be considered local if the finishing process is done locally e.g., roasting coffee.

If we want to understand local, we need to break down the elements of supply chains at a basic level.

Direct Supply, also known as farm to fork, is when a primary or secondary producer sells directly to the consumer. Examples include baker, farm with gate sale or shop or supply directly to a restaurant. This model is considered the optimum for freshness and nutrition of the product and the farmer can gain a higher margin on the product. There will be low food miles and less need for intensive processes along the way.

Although farm to fork is often considered the best route to take, it is important to consider that the process might be far more labour intensive and packaging, staff, deliveries will incur costs. Also small scale supply and offering might impact convenience.

Local or regional supply could be sold via a farm shop or a butcher. Again, a restaurant might use a local supplier for ease of getting everything in one place. For convenience, short supply chains and miles this can be a great model for small/medium scale producers. This can take certain responsibilities such as sales market and delivery away from producers to allow them to concentrate on making their product and benefit from keeping a large proportion of the final cost.

The downside could be that even at this scale the prices might be higher than other competitive suppliers and variety on a local scale might not meet the needs for the customer. There also might be transparency issues if the supplier sells non-local items alongside local products. Food waste could drive suppliers to source cheaper produce for economic efficiency.

National supply is when a business can get its produce to the whole of the UK. Larger companies and supermarkets usually operate at this level. The supply chain requires a fast and efficient system that can distribute masses of food to the required outlets whilst keeping everything fresh. Often there will be more complex processes for the food and distribution, this might include monoculture farming practices, corporate farmer cooperatives, packing plants and distribution hubs. There might be more intricate logistics requirements.

At this level, businesses can be hugely competitive meaning the consumer can get food at a great value. The consumer will also now have much more choice and the outlets will offer a more convenient service. This supply can be also coupled with non-food items for further convenience.

Larger companies have more control of the often-leaving suppliers with a much smaller share of the end cost. Quality and freshness of foods might be impacted due to the production scale. Competition will drive prices down resulting in (often lower) negotiations year on year leaving food producers in a vulnerable position. Supermarkets can also produce a similar product and compete directly with food producers in house.

Worldwide supply can vary from specialist small scale production to billion-pound enterprises. The customer will usually have access to a whole range of specialist or exotic produce. The supply chain can provide items that can be produced or grown in the UK. Worldwide certification can ensure fairtrade of product quality and less intensive methods could be used such as shipping rather than airfreight.

Imported foods have a large carbon footprint and might require a heavy process to produce and ship. The foods will likely pass-through multiple sources before arriving at the destination and the customer will experience little connection to the food produced. Trade barriers can make this system fragile, and laws will vary leading to grey areas and little transparency.

It should be noted that there can also be cross sectors within these chains. Food might not be exclusive to one category and producers could utilise one or all the options and will usually have the freedom to do so e.g., a small-scale producer could sell online and ship nationwide while a small-scale farm shop will import bananas. In some cases, larger companies or supermarkets might contract the producer to an exclusive supply.

The guide highlights basic supply chains but other elements could include marts, traders, agents, buyers, logistic companies and packing factories,

When considering food miles, it is important to understand what other processes occur in the supply chain. In some cases, our findings have concluded that a product might travel to a packer, bottler or abattoir before coming back to the producer.

An efficient local food system would ensure that all food production, outlets and processes are confined to a manageable area.

Although there can still be grey areas with supply chains it is recommended that consumers research or ask questions when purchasing produce. In turn, these questions could help create a better demand for local produce.

Securing local supply chains

Swansea is typical of many other UK cities in that a large proportion of the food supply to both individual households and businesses comes from outside the immediate geographical area - largely even from outside the country.

An opportunity exists to build on these good examples and also to build stronger supply networks between these early pioneers to mutual advantage. External bodies that can provide support for producers include Menter a Busnes and Cwmpas.

Drawing on the evidence collected during the study, and on experience of building short food supply chains in other parts of the country we recommend the following:

- Existing **farm shops** around Swansea might be interested in boosting trade by running open days where they offer local producers a stall and provide entertainment to attract local shoppers and tourists. The Bowhouse Link (13) in Fife, Scotland, is an example of success in this practice. Locally, Dunvant Farm Shop provides a similar opportunity
- The **farm to fork** movement is a social movement that promotes serving local food at restaurants, schools or other amenities, ideally through direct mechanisms (i.e. the venue purchases directly from the producer). This could be an 'umbrella' campaign that encompasses farmers' markets, local distribution, supper clubs and food hubs.

Swansea's **markets** might also benefit from adding an online shopfront to supplement their face-to-face market days. Aberystwyth Food Hub is a Wales-based example (14). Adding an online option to support in-person trade has several benefits:

- More producers can sell through the market, including producers with relatively small volumes of product who would not be able to justify paying for a stall at the market
- Shoppers who prefer not to browse the market can order online and either collect all their produce in one go from a market collection point or pay for home delivery
- Producers who are selling at the market are travelling home with empty (or half-empty) vans and can offer to be a pick-up point for shoppers who live close to their farm. This extends the geographical reach of the market, reduces the carbon footprint of shoppers who would otherwise drive into the market and gives an income to the producer who can charge for the service.

Farm shops can benefit from having an online shopfront to supplement their retail presence. Benefits include;

- Shoppers being able to place orders 24/7 and have all their purchases ready for collection or home delivery
- Farm shops with limited shelf space can offer products from other local producers which do not need to be held in stock but can be ordered in on demand

The Cornwall-based Cusgarne Organic (15) displays strong integration between the website, the online shop and other farm-based offerings, such as accommodation.

A coordinated approach within Swansea, the region, or Wales-wide, could support the efforts of individual farm shops to market themselves.

Good Food Loops. As more and more local food supply enterprises of all the types listed (above and more) start to spring up in an area there are huge benefits in linking them together to share suppliers, customers and distribution infrastructure. A good example of this is the South West Good Food Loop which links up four food hubs and a network of over 100 producers (19). By sharing the costs of a van which travels between the hubs and producers the participating hubs make considerable cost savings and increase the product range available through all four hubs which makes the hubs more attractive to shoppers and buyers.

Food loops could offer a mutual support mechanism to alleviate cost pressures created by high inflation and rising costs that are threatening some food box delivery models (20).

Examples in Wales include the Aberystwyth, and Canolfan Maerdy food hub in Carmarthenshire.

Public procurement is another option for Swansea farmers and growers. Many third sector buyers including health and education authorities are increasingly focused on buying local produce. One of the downsides for producers is that these buyers often require high volumes of produce which are difficult for single producers to supply consistently.

To address this difficulty, initiatives such as Dynamic Purchasing UK are being piloted. Downsides of this approach include the cost of involvement and the fact that the platform used to link producers and buyers is proprietary software. An alternative is the Senedd-funded project currently underway in Powys which is trialling the use of an open source network to aggregate produce from multiple small-scale producers to meet the consistent volume requirements of NHS buyers. If these trials are successful, there are plans to make this option freely available across Wales.

Regional supply chains

There are not many Swansea-based food wholesalers. This potentially offers an opportunity for local producers to consider working collaboratively to provide communal delivery, or a farm to fork wholesaler system.

Choice is Yours

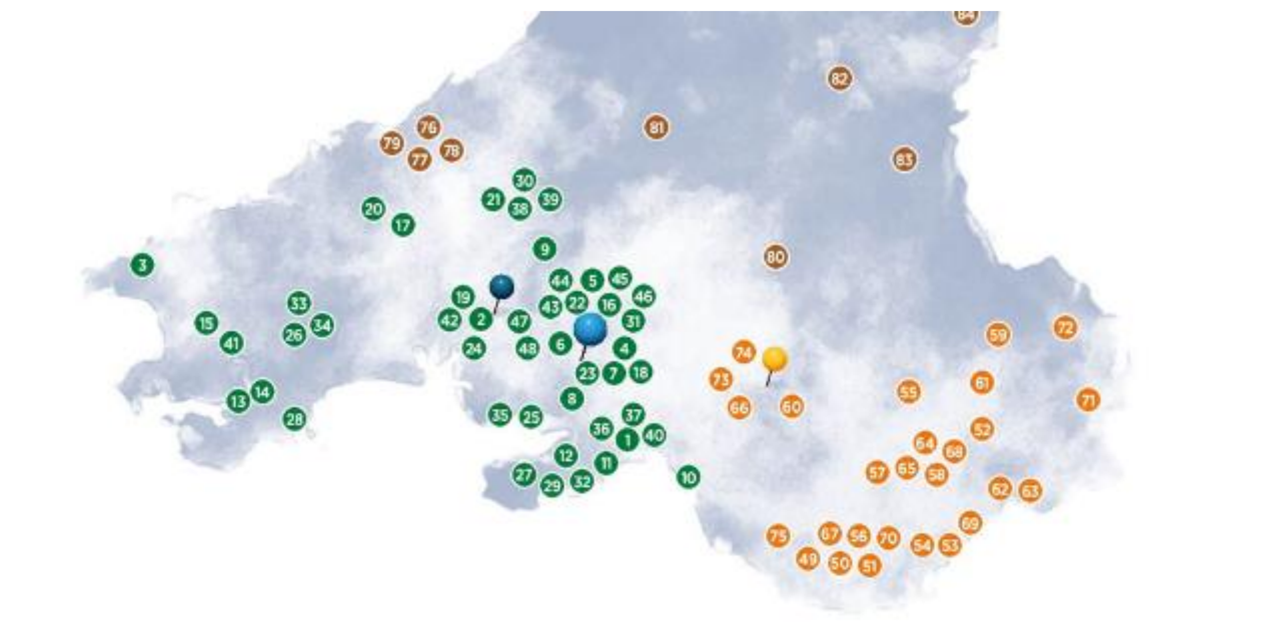
This Swansea-based greengrocer supplies two local shops as well as a number of hotels, restaurants and other premises. They are part of the 'Healthy Schools' programme to provide a healthy alternative to snacks in schools.

Castell Howell

Castell Howell is a large family-owned food wholesaler covering Wales and the English borders. The company started in 1988 and has grown significantly to become an important part of the food industry in Wales.

As part of our engagement, we met with a senior staff member of Castell Howell who was extremely helpful. They were keen on emphasising the current supply from local producers (21), and especially keen to hear from organisations with products that produce fresh fruit and vegetables, or other products that offer something new or different from their current local produce offering. Castell Howell has a dedicated Welsh food buyer, the contact details of whom can be found at the beginning of the Wales suppliers booklet (21).

The Swansea City and County area is one of the more densely represented areas for suppliers, with drinks being a particular area of interest.



A map of current local suppliers to Castell Howell in south Wales

A strategic approach to support local suppliers should therefore also include supporting Wales-based wholesalers who can stimulate the lower tiers of the supply chain, particularly by specifying local and Welsh produce via procurement or catering contracts.

Blas ar fwyd

Blas ar fwyd is a Llanrwst-based company that has a distribution hub in Swansea (22). Founded in 1988, the company caters to both retail and wholesale, offering a range of products sourced from Wales. Blas ar Fwyd are SALSA (Safe and Local Supplier Approval) accredited providing refrigerated delivery across the breadth of Wales and the Welsh borders.

The company is dedicated to supporting Wales-based producers and is keen to help new producers access their distribution network.

Watson and Pratts

Watson and Pratts is a Lampeter-based supplier of organic produce and is active in supplying the Swansea area. The owners of the company have a strong ethos of providing quality food, and the distribution network extends from south Wales to Newtown and Welshpool in mid Wales.

Other regional suppliers

- Bako
- Total Produce (UK supplier with Swansea hub)

Local suppliers for Total Produce in south Wales

Swansea marine and seafood industry

Historically, Swansea's marine trade was a thriving local industry. North Dock was host to a vibrant fish market and the busy port complimented by the city's industrial heritage. At the beginning of the 20th century the docks were developed to accommodate large sea trawlers and accelerating trade.

A large part of this industry has now been lost to larger scale production, being able to compete more efficiently with demand and price. The buildings at the docks including the Ice Factory still stands strong and the area has been given a new lease of life by the thriving restaurant trade.

In 2012 the Swansea Bay Fisheries Local Action Group (SBFLAG), a community led group, with Swansea Council administered the funds to explore a sustainable and economically viable model for the future development of Swansea Bay. A large part of the SBFLAGs work includes a strong vison for sustainable seafood production.

In 2015 the development plan captured data showing that only one day boat was operating commercially in Swansea and that a large majority of seafood caught was shipped for overseas trade. Options have been explored for a local auction house in the neighbouring harbour of Burry Port. Although the results have not concluded an obvious demand with current local operation levels. It would be worth exploring if a smaller-scale wholesale market in Swansea Marina or Docks could help regenerate the industry. A fishers' cooperative in Plymouth called 'Sole of Discretion' has demonstrated success and could be used as a case study or role model for a collaborative approach in Swansea (30).

Species	2009		2013		Tonnes	Value (£)
	Tonnes	Value (£)	Tonnes	Value (£)	% change	% change
Bass	12.3	75377	12.9	93044	+5	+23
Ray*	56.2	90714	28.5	38406	-49	-58
Cod	0.5	1220	0.4	1154	-24	-5
Whelk	163.2	103601	68.8	49321	-58	-52
Sole	2.9	26301	4.9	44024	+72	+67
Lobster	6.9	73281	4.2	45572	-39	-38
Plaice	4.3	8431	2.6	3437	-39	-59
Crab	2.4	3208	2.6	3403	+6	+6

Breakdown of landings by catch and value, in 2009 and 2013

The Dreckly Project is a commercial set up where three Cornish fishermen collaborated to auction their catch on twitter. The team would manage all aspects of the process and ship directly to the highest bidder. Employing already available technology such as social media and messaging platforms to establish direct communication with the customer could be a great way for start-ups to pilot direct sales.

	>10m in length		< 10m in length	
	2010	2015	2010	2015
Swansea	1	2	33	25
Porthcawl	0	0	5	2
Port Talbot	0	0	3	3
Oxwich Bay	0	0	3	3
Total	**1**	**2**	**44**	**32**

Summary of fleet distribution and trends 2010 to 2015, with Swansea being registered as the home port for 81% of vessels in the fleet

North Gower has a long affiliation with producing world class cuisine and is internationally well known for producing seafood delicacies. The tidal range, vast estuary channels and sands provide perfect conditions to gather cockles, laverbread and samphire. The majority of catch at Swansea Bay is Whelk (popular in Asia) and Skate (often used as bait).

Ashley and Kate run Selwyn's Seafoods, founded by Ashley's grandfather, the business gathers and manufactures cockles from their factory on the marshes of North Gower. The family are regarded as local food heroes and the company is celebrating nearly one hundred years in business. The company has established strong international trade connections and have partnered with a Catalan company to enable a stronger supply to the continent. They have also launched their own seaweed brand and their most recent venture enables them to sell directly to customers as well as offering a small local menu through their on-site Seafood Shack.

Remnants of this rich heritage can be found throughout the villages of North Gower; cockle licensing laws are still written in local property deeds. Cockles and laverbread are still favourites in local restaurants and can still be found for sale at Swansea Market. The SBFLAG held cookery demonstrations in Swansea Market to encourage demand for local produce, cockles, laverbread and fish which were well attended by the local community. The recent surge in tourism to Gower could help establish a stronger link between food businesses in the area. Promoting food trails could attract more visitors along the North Gower route from The Rake and Riddle to the Britannia Inn.

In the late 19th century, the oyster trade in Mumbles thrived with ten million units landed locally each year. The FLAG facilitated a study to look at introducing 4 million Oyster seeds to the bay. This could lead to exciting further aquaculture development and potential links could be introduced for ‘port to plate’ supply to the future new wave eateries of Mumbles seafront such as MOR. The resultant Oyster Restoration Plan produced a list of recommendations and next steps which if undertaken could restore oyster beds, although this would take several stages and would require a significant lead time of 10 years.

The strategy came to an end in 2020, although the programme continues to deliver and implement funded projects until 2023. Utilising the SBFLAGs communication plan, which includes publicity, marketing cycles could be continued through new food funding streams and incorporated into the Local Food Coordinators programme of works. The success for the cooking demos, mentioned previously, and education events such as Fish is the dish lessons to primary schools across the SBFLAG area, could be continued across the Swansea Food Partnerships network.

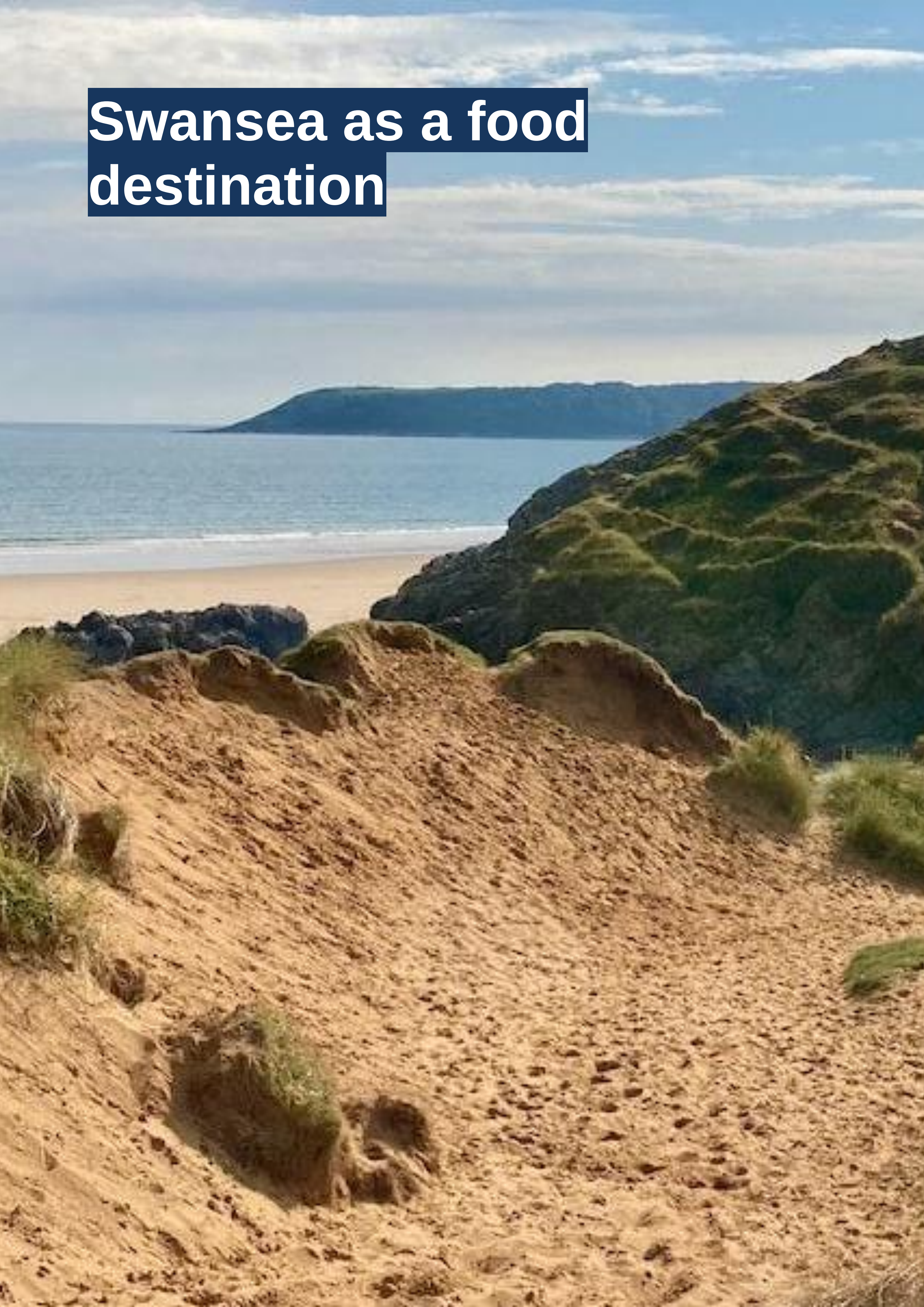
NOTE: the SBFLAG covers four local authority areas i.e., Swansea, Bridgend, Carmarthen (Burry Port) and Neath Port Talbot. You can find out more information about the SBFLAGs projects here.

Connecting food networks

There are many different organisations, projects and policies that could be helpful to Swansea’s local food network development. We suggest that any follow-on work from this project is engaged with as many of the local, regional and national organisations as possible. A stakeholder engagement exercise targeting such actors could also prove helpful for the development of funding bids for further support.

A number of these organisations have been listed in Appendix 2.

Swansea as a food destination



Some suggestions from food producers and users in Swansea for improving the local profile as a food destination are listed below.

Networking and promotion

- Have lots of cookery demonstrations (Swansea chefs) and food tasting in places like the Royal Welsh Show, have pop-ups in places like Borough Market etc
- Collective promotion
- Develop a local sustainable food label for producers, shops and restaurants and promote the scheme to locals and visitors (this suggestion is separately endorsed by academic literature (31), (32))
- We have some fantastic food producers across Swansea, and we need to promote them. Larger scale farming happens in places like the Vale, Powys or Pembroke but we have a lot of history. Gower benefits massively from tourism and adding the name to food but there are many outstanding food producers outside of Gower too
- Comprehensive website with links to everyone
- Use of products in national television programs

Quality and provenance

- The history and culture, the amazing produce, and the support of local artisan producers who respect the importance of farm to fork.
- Emphasise locality and quality
- Excellent husbandry care and monitoring
- Celebrate not just the beauty spots but also the food produced. Gower used to be the garden of Swansea growing large amounts of vegetables etc along with prime meat from its fields and commons.

Food sales opportunity or infrastructure

- Provide the excellent markets that we see in Europe full of local produce
- More local outlets
- Make it easier to host markets and to also help advertise local producers
- Enhance the shops and do pretty frontages to encourage people back into the town to buy local. A large farmers market/farm shop where only food produced in Swansea can be sold. E.g using all raw produce from farms/sea around Swansea.

Other

- Why not reinvest in Swansea’s marina area, try to support the local fishing community to rebuild and make Swansea the Newlyn or Padstow of Wales
- To have an identified personnel officer to help facilitate diversification and knowledge of the area / other businesses that we could sell our pork, lamb, fresh milk to - reduce the barriers

Existing capacity

Swansea City and County is the venue for a range of existing festivals, many of which incorporate food as part of them. However, in order to find out information about each activity, separate web searches need to be carried out. Building relationships with local publications such as Swansea’s ‘What’s on’ could be helpful in building awareness of these events.

The aim of making Swansea a food destination could be enhanced by the production of a website to combine existing events into a single 'destination' website. However, this would need to be done with great sensitivity to avoid issues of 'ownership' from existing active networks and local food supporters.

Visit Wales lists a number of existing food festivals in Wales, including at Narberth, Newport, Margam Park, Abergavenny and Llangwm (33). Previous or current festivals that include a significant component of local food include:

- MumblesFest (34)
- Oystermouth food and drink festival (35)
- Pennard Carnival (36)
- Love Trails Festival (Gower) (37)
- Gower Gluttony Food and Crafts Festival (38)
- Gower Chilli Festival (39)
- Gower Good Food Festival (40)
- Swansea Street Food Festival (41)
- Swansea Bay Pop-up (42)
- Gorseinon Food Festival
- Mumbles Oyster Festival

Regional events include the National Laverbread Day which could also be celebrated in Swansea, given local production. The inaugural National Laverbread Day was held on 14 April 2022 (43) and was promoted via a bespoke website (see Figure 2). **Swansea's proximity to good seafood resources should lend itself to participating actively in this initiative for 2023.**

Figure 2: The header of the website to promote 'National Laverbread Day'

Local or regional food festivals offer a potential route to market for smaller suppliers. Providing a coherent and current listing of events ahead of time could be helpful for producers aiming to plan their sales activity for the year ahead.

Other routes to market

Direct to Consumer (DTC) platforms and activities can expand producer markets, stabilise rural retail businesses and improve rural food access (44). Examples of DTC initiatives include:

- Veg box schemes
- Vending machines
- Farmers' markets
- Food halls
- Food hubs
- Farmers' cooperatives
- Meat boxes
- Share schemes, such as the Cow Tan scheme to help purchase grazing cows
- Gate sales
- Community supported agriculture

Each of these approaches can potentially lead to additional sales, and also to an increase in brand and visibility of the product and business.

Veg box schemes

Veg box schemes are a growing market that were considerably boosted during the Covid-19 pandemic. In April 2020 101 veg box schemes were operational across the UK (45). Some local veg box schemes currently operating include:

- The Choice is Yours (Swansea, Mumbles and Gower)
- Paviland Farm (Gower)
- Caetan CSA (Gower)
- FarmCo (Swansea)
- Get Fresh (Swansea)

Veg box schemes have been highlighted as playing a potentially important role for those experiencing food insecurity (8). The increasing cost of living, particularly for everyday staples including food, could allow a further development of veg box schemes, increasing the amount of local use and incentivising further local production.

Vending machines

Swansea benefits from a local company, BVS, that is already producing vending machines for drinks and other produce that - in principle - could be used to support local food production and sales in the area (46).

A number of entrepreneurial farmers local to Swansea are already providing a round-the-clock service for their products via vending machines. These include:

- Farm-tastic Milk, Gorseinon (47)
- Ty Llaeth, Pontarddulais

Vending machines are becoming an important additional ‘shop front’ for farms more widely in Wales, such as:

- Llanfrynach farm, Cowbridge (48)
- Llanrhaedr farm, Denbighshire (49)
- Llaeth Jenkins, Talybont (50)
- Llaeth Llandyn, Llangollen (51)
- Fforest Farm milk, Whitland (52)

This study has not been able to determine whether vending machines are profitable; but the media attention given to several of the examples above suggests that there are additional benefits, such as profile-raising, that can arise from adopting this technology.

Farmers’ Markets

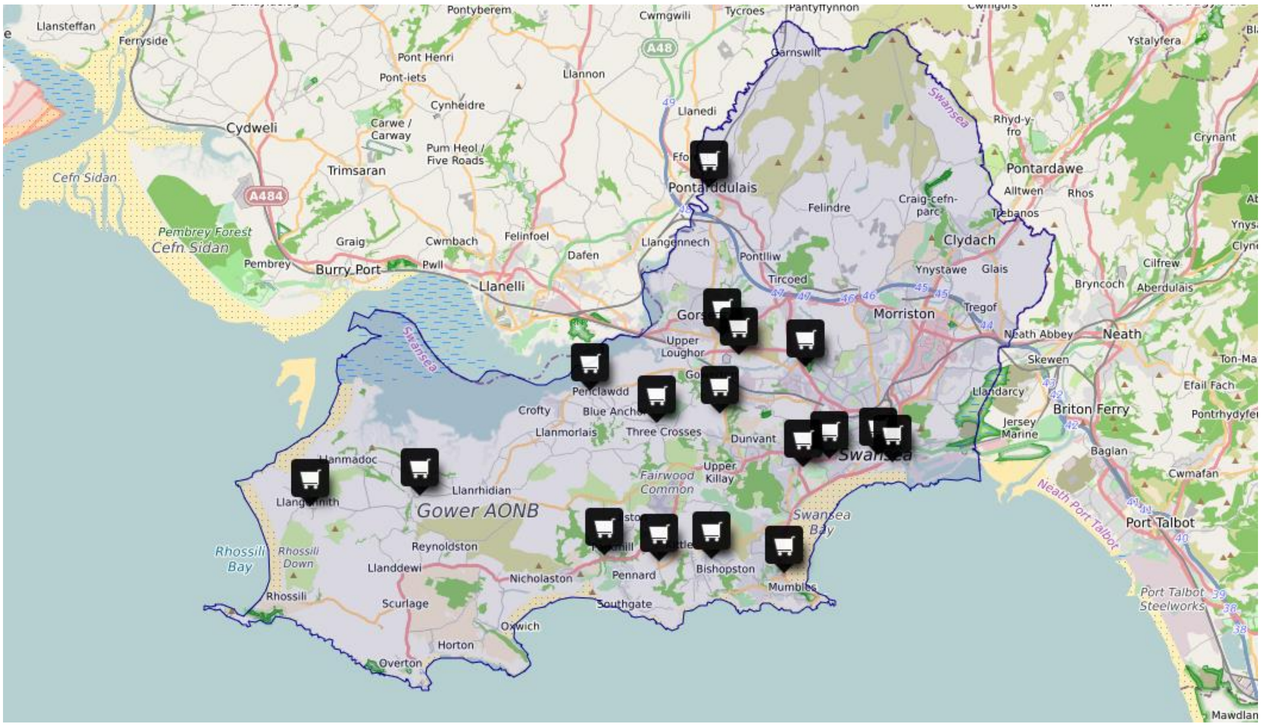
There are already a number of active farmers markets in Swansea City and County, providing a valuable opportunity to sell directly to customers. Direct sale through farmers’ markets is an important economic engine that supports small producer viability and acts as an incubator for broader business development, whilst also supporting a place-based attraction for shoppers who may increase their dwell times in the local area, further benefiting local businesses (53).

Farmers’ markets provide the opportunity to create virtuous circles of behaviour, embedded in the relationships between seller and buyer, with patrons being educated in the virtues of local food production, and able to influence producers with their purchasing power and feedback.

International research on the reason for people to visit farmers’ markets emphasises the value in communicating social and emotional aspects, as well as product characteristics. For example, connection to locality and health should form a part of a strategic campaign to support farmers’ markets in Swansea. Fulfilling the social and emotional needs of younger shoppers through this sort of communication was seen as particularly important (32).

The USA is another modern economy that has embraced farmers’ markets. There are interesting examples of data-driven decision-making for developing farmers’ markets (54),(55), and we recommend that **supporters of local food in Swansea use good practice and new digital tools to improve decision-making and promotion of farmers’ markets.**

However, farmers’ markets or pop-up markets also face their own challenges, meaning this is not a panacea. They can be hard to maintain even in affluent areas, and rarely manage to do more than cover their costs. Initiatives to reduce the administrative costs of markets could incentivise their deployment outside existing areas.



The location of farm shops or farmers markets in Swansea City and County

Food halls

Swansea Food Partnership has established the demand for affordable commercial spaces for food businesses to produce and sell their products. Through their established networks, the partnership has identified the need for a stepping stone platform to help smaller scale businesses who are not yet ready to take on larger high street units. Furthermore, the current challenges throughout the cost-of-living crisis means it is more important than ever to support small local businesses.

The Partnership's vision is a smart local food network that will capture all elements of food business; retail, supply and production to strengthen the offering of local produce within rural and urban wards. The plan can also facilitate a new wave of local food production from farms, fisheries and local businesses.

This vision could take shape in many formats, however, the Partnership discussed that a Food Hall could capture the fundamentals in an all "under one roof" approach. Jack Joseph, Local Food Coordinator states "to achieve our goal of Swansea becoming a food destination, one of the key areas of focus would be food production and retail for small scale producers, ideally in one place". The space could also capture local food events, produce markets and a food hub for all things local and celebrate what we have to offer here in Swansea.

Urban Foundry have proposed a scope to develop a food hall in the city centre to emulate a European market offering. Location plays an important factor, if a cluster of production and retail spaces is achieved, the space will need footfall or be marketed as a destination venue. The recently developed 'Market Garden' in Swansea market is a great example of development within existing spaces can increase demand for a 'street food offering'.

The beginnings are there already with a high-quality offering of seafood, meat and veg. “To make it work would require a reasonable critical mass of providers located around a central area to create a strong sense of a food theme, and linking to the relatively recently created seating area, coupled with strong marketing and audience development”.

Furthermore, although there is merit in a Food Hall, other businesses and organisations such as food stalls, events, venues should be considered. A large-scale project should seek to complement existing businesses in the surrounding area rather than offer a direct competition. This can be hard to achieve, especially in the city centre where there are similar, longstanding food businesses.

An option for a food space on the outskirts of the city could also be explored. The RDP has identified the need to support and integrate rural food production from other rural wards into the city (specifically the north and east). A hub for these farmers and food makers to showcase their produce and create a real farm to fork experience. The Hafod Copperworks could be an ideal food destination and complement the regeneration plan for the area.

Pilots for a multipurpose food space have taken place with Urban Foundry’s creation of Unit Nineteen in 2017. The temporary ‘popup’ street food venue demonstrated the potential for an alternative early evening offer in the city centre focused on street food provision, coupled with a bar stocking locally sourced beers. The ‘Street Food Friday’ events at Unit Nineteen were very popular and drew a large and varied audience monthly. Whilst there are limitations to the conclusions that can be drawn as it was intended as a short-term and low budget project, with extremely modest marketing resources, it did prove difficult to make the model work on a regular weekly basis (numbers dwindled significantly when the format was moved from once monthly to weekly). Urban Foundry states that a similar pattern was evident when moving Marina Market (which has a stronger street food element) from a once monthly to a weekly format during the summer of 2022. “Audiences thinned considerably until it reverted to a once monthly format”.

Although the figures are unavailable, Founders and Co have demonstrated visual success of this model in a more permanent manner. Although the backbone of the business might still include wet trade, it has been impressive to see how the business now attracts a different demographic and accompanies audiences using the new arena and surrounding developments.

To attract and benefit local producers to a multi-vendor eatery, it would be important to consider realistic rental agreements so they can truly benefit. Ben Reynolds founder of Urban Foundry and member of Swansea Food Partnership states “A key consideration for any food hall models that the Council may review, is that many of the local providers are small – many one or two person operations, with very little ability to ride out loss leading time whilst such a concept establishes itself and limited capacity overall in terms of their time to both prepare as well as sell their goods.”

The space would need to be flexible to accommodate different set ups with varied needs and scale. Given the success of the space, workable contracts might be explored to protect the producer or allow small businesses to grow.

As a developing city with huge potential and with a large demographic who are demanding a better offering of local produce it is vital that a multipurpose food space is explored. Food

Halls are popping up in thriving cities in the UK and across Europe and it is important that Swansea has a vision that leads the way.

Food hubs

Food hubs are a way of local producers being able to sell their produce through a combined 'shop front' to reduce the length of supply chains. The Resilient Green Spaces project is supporting the development of five new food hubs in Penygroes, Bethesda, Ammanford, St Davids and Upper Rhondda (56).

Food hubs play an increasingly important role in building short food supply chains. Swansea's FarmCo is an excellent example. There are many variations on the theme of food hubs but the basic principle is that a range of different producers come together to offer an online shopfront from which shoppers and buyers can order a basket of produce from multiple producers. The hub then receives the produce, prepares boxes for each buyer/shopper and then delivers to individual locations or to pick up points. Here are a few examples of successful hubs in other parts of the UK:

- Tamar Valley Food Hubs deliver to both retail and wholesale customers as well as offering incubator support to new food production businesses (16)
- Cambridge Food Hub is a business-to-business model (17)
- In My Back Yard is a producer hub led by a poultry producer who started their own online shopfront selling only their own produce and then was approached by other local producers who asked to add their products to the shopfront. They are now a cooperative of 48 producers selling through the hub (18)

Every hub is different and tailored to the needs of the local producers and shoppers/buyers. Here are some tips for new hubs starting up. Note that the benefits of setting up food hubs do not depend on using one particular platform; there are several options of food networking and sales platform.

Farmers' Cooperatives

Cooperatives can show resilience by sharing resources, having increased supply and managing larger scale distribution. This report identifies the opportunities and challenges in these models.

Formal farmers' cooperatives usually supply larger vendors and supermarkets. Cooperative working is popular in the dairy industry and the ease of shared distribution can allow individual farmers security in orders and managed logistics (see Case Study 1: Llannant Farm). At this level, the farmer can still be vulnerable at the hands of larger corporations; there are also drawbacks that can prevent some farmers from joining cooperatives.

Taking the benefits of cooperative working and applying them initially to the challenges of local food distribution is recommended. As participants see the benefits of this cooperation, it is likely that the scope of collaboration can extend beyond just distribution.

In principle, a local farmers co-op could take shape in a similar format as a food hub. A central distribution point could make it possible to manage orders from a central online system, in/out deliveries, storage, and packing. One issue food hubs have faced is building and maintaining a large enough network of farmers and food makers for a household supply. For larger supply such as to restaurants or schools, having a continuous supply might be a difficult task to achieve; however, with the correct funding and support it could be a positive step for local food systems and local supply chains (see Case Study 7: Shepherds; field to shop).

Examples of distribution co-ops include Tamar Valley Food Hubs and Stroudco Food Hub both of which have a board of directors made up of producers selling through the Hub. These directors steer the strategy and scope of the food hub. Over time the producer members have developed mutually beneficial links beyond just the advantages of shared distribution costs. For example, Stroud Brewery had been paying for the waste disposal of their spent malt grain. This is now collected by Stroud Community Agriculture as a nutritious contribution to their pig food.

Calon Wen is an example of a Wales-based farmers' cooperative that brings together a number of small, organic, dairy farms. This cooperative enables online purchases, as well as providing sufficient scale to enable the group to engage with major supermarkets.

Pipers Farm is an online marketplace supplying the consumer directly with high quality regenerative meat. The farm started as a fifty-acre pasture operation supplying the family's local butchery business on their local high street in Devon. The Pipers farm brand has diversified and expanded to create a network of 30 farmers, mostly within a fifty-mile radius of the original farm, to supply tens of thousands of customers nationwide.

Further consultation to investigate this model might help form future networks and allow them to manage an online direct supply or as a local supply hub.

The Resilient Green Spaces project, managed by Social Farms & Gardens, has a number of strands that will support work on food hubs in Wales, including the development of a national allotment team, creating five food hubs, community orchards and community access to growing spaces. Using this resource as a pilot could enable bigger projects in the future.

Independent local producer hubs

Some local producer communities have developed their own producer hubs. These include Wales-based groups such as The Food Collective, Cowbridge (57) and South Wales Food and Drink (58).

Food Vale

Food Vale (59) is the Vale of Glamorgan partnership for supporting local food supply chains, with an initial focus on good local food for Llantwit Major. It has also helped launch 'Food Vale Fest', the second annual local food event for the Vale of Glamorgan.

Neighbourfood

Neighbourfood is an Irish company with a presence in the UK (60). It advertises itself as providing the platform to "Sell your amazing produce to the local community and get a fair price along the way”.

The Open Food Network (OFN)

The OFN (61) is the only open source (common ownership) platform providing food producers with a wide range of options for selling to local shoppers and buyers in a network of short food supply chains including direct sales, food hubs, online farmers’ markets, food co-ops, buying groups and food banks.

Tried and supplied

Tried and Supplied is a London-based company that supports organisations that would like to procure food locally. “We help food businesses stay ahead of the curve and focus on serving customers” (62).

Ynys Môn: Crowd-sourcing apples and pears for cider production

Jaspels Cider is a privately owned company on Ynys Mon that has an unusual and intimate link with local communities (63). Not owning any of their own orchards, the company put out a call for unused local apples and pears to donate to cider production, with the incentive of a reduced price for cider purchase, and some free cider the following year. This approach has reduced food waste, and supports a small business that contributes to the local economy.

Community supported agriculture

Whilst CSAs have limitations on membership and supply capacity and should not take away from the work of farmers or their role in the food chain, they do have a role to play in local economies.

Wales’ thriving CSA sector is recognised internationally as playing a distinctive role as part of the social economy (7). It would seem that Wales has a potentially unique opportunity for local food networks to build on the CSA successes, as long as barriers to replication and participation at macro levels can be overcome. CSAs play a role in connecting and empowering individuals and communities at the local scale, and these communities are likely to also wish to support local food networks more generally.

Since the start of the Covid-19 pandemic, we have developed an implicit understanding that global supply chains carry intrinsic risks when existential events have the potential to shut down entire economic sectors, virtually overnight. This has indirectly underlined the importance of the CSA network and increased its relative importance for local food supply. CSAs have been highlighted as playing a potentially important role in providing food for food-insecure households (8).

CSAs are not intended to replace traditional farming but have a particular niche in enriching social interaction, developing skills, and improving interactions with, and understanding of, nature and farming.

Recommendations to support CSAs include:

- Quick funding for small projects and initiatives
- Developing sustainable food partnerships
- Coordinating and linking with Government policies

Local farming and supply chain feedback & case studies

Primary producer survey responses

Egg producer

- Feed costs were highlighted as the key viability issue. Another issue was lack of access to land, and regulation that seemed to be more targeted for big producers being also required for small producers. Desire expressed to see more small producers, rather than small producers necessarily growing to become large ones.
- Quality of local food was the key positive differentiator for Swansea
- All of the produce is sold locally

Livestock farm responses

- Most wanted changes to increase viability included:
    - Increase sales, increase price of product, being able to market and sell directly to consumers, cost of feed, fertiliser, diesel, utilities and silage wrap, financial support to diversify, group buying (such as the old Gower Growers), funding for renewable energy
- Most suggested items for increasing the proportion of food sold locally included:
    - Better marketing, grant funding to have vending machines, coolers, local abattoir, direct farm to door or to local restaurants, a named 'personnel' to support farms with diversification
    - A cooperative was suggested as a way to help support local producers, and to get the scale that big retailers need
- The proportion of produce sold locally varied from 0% to 100%, with an average of 37% from the ten producers in this sector. Several expressed a desire to be able to sell more locally from the farm gate.

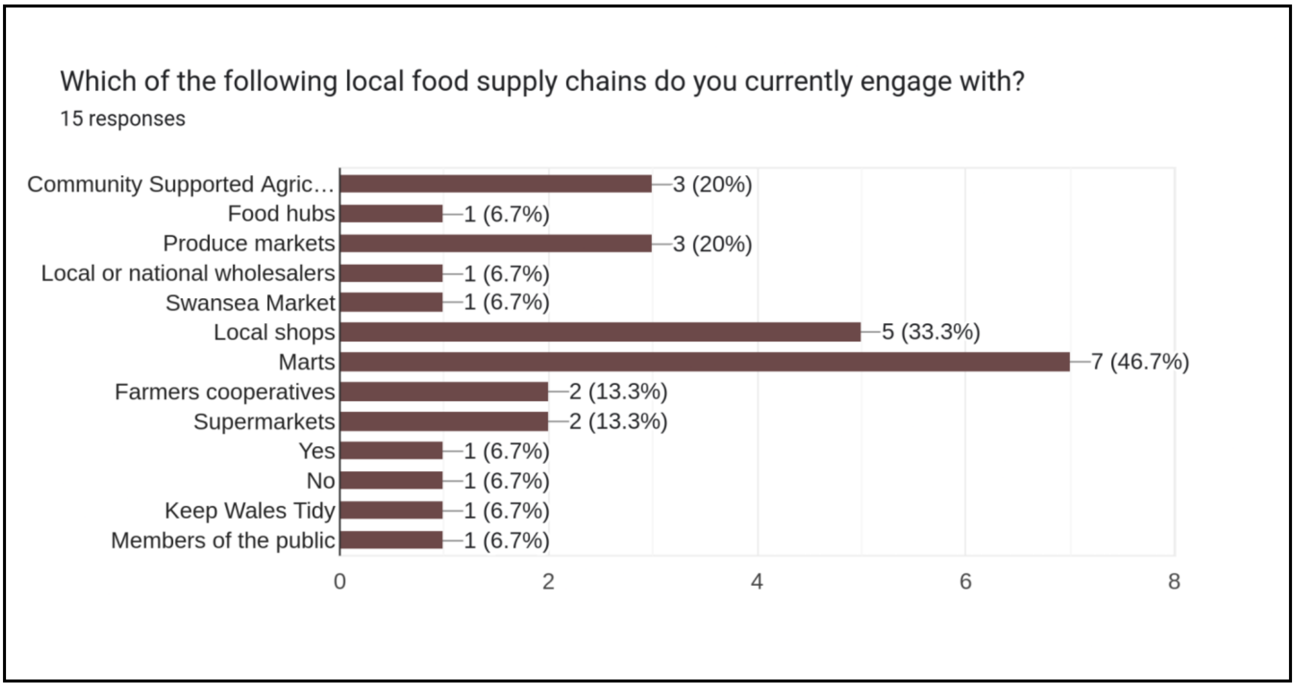
Mixed farm (arable and livestock) responses

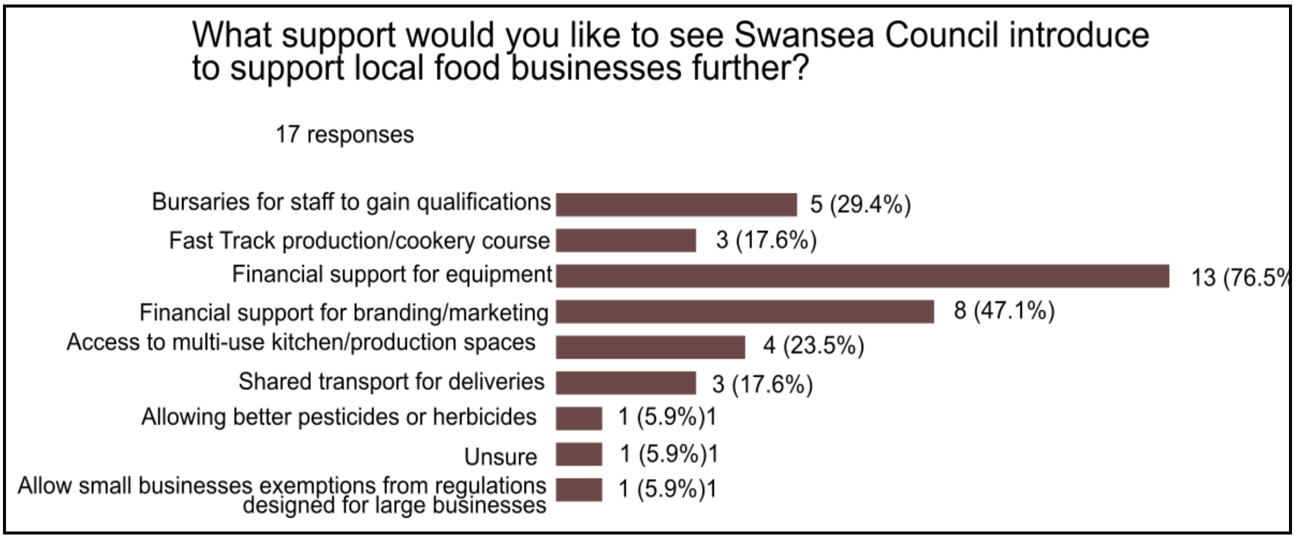
- Key viability issues were:
    - Overburdensome regulations; more local food purchasers; support in the early years of a farming venture for labour.
- The proportion of food sold locally varied from none to all of it, with an average of 54% from the five producers in this sector
- Suggestions to improve the amount of local production included:
    - A local abattoir, help with marketing, and more local produce purchasers

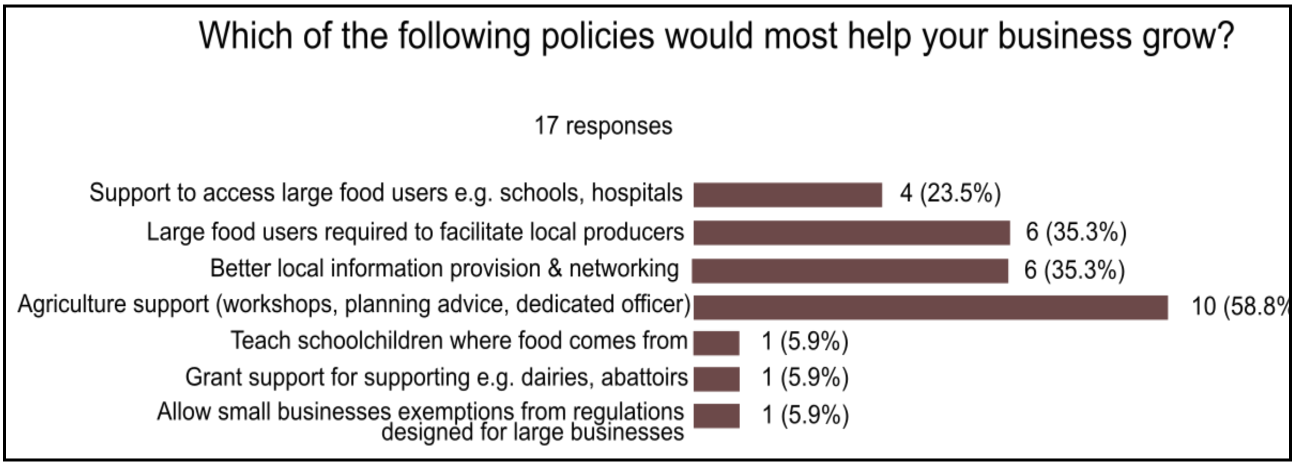
Other fruit or vegetable growers

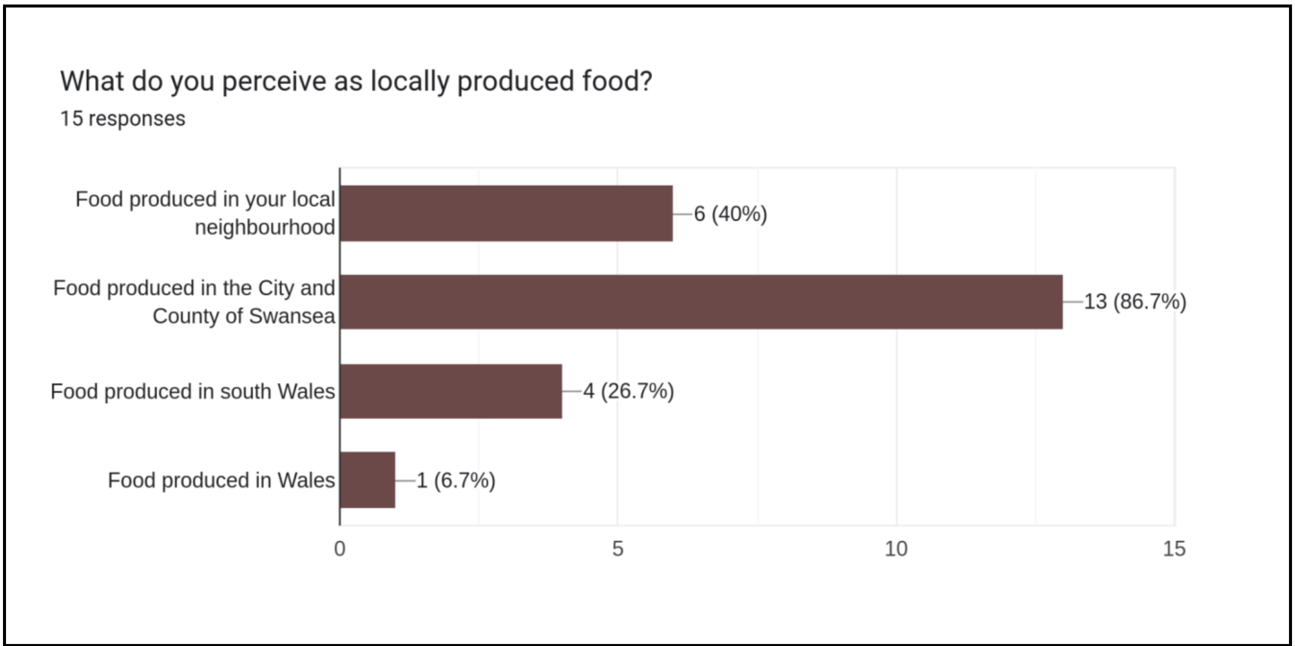
- Key viability issues are:
    - Cheaper ways to sell produce, better opportunities to access procurement markets, provision of business advice, and cheap marketing or advertising opportunities
- The proportion of produce sold locally varied from 0 to 100% with an average of 55%
- Other suggestions to improve the amount sold locally includes:
    - Pick-up hubs, advertising, more awareness from local householders

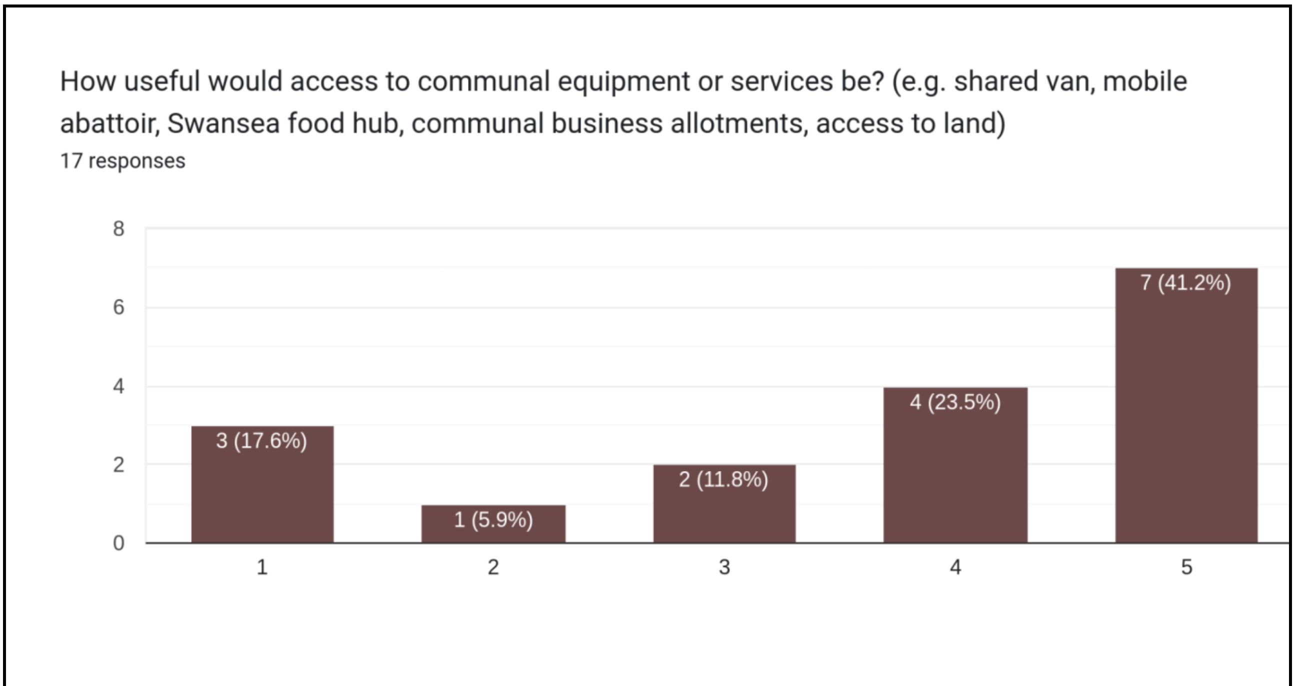
Summary responses











Desire to see communal equipment or services, with 5 being ‘very useful’ and 1 being ‘not

useful'.

For a more in-depth review of farming in Swansea, the Swansea Food Partnership conducted interviews with various food businesses across urban and rural wards within our local food system. The studies capture rich data that includes the business's history, ways of working, and current challenges. SFP has also used the Economic Recovery Plan to make links and recommendations. This section will help the partnership create an up-to-date schedule of works to assist the future of food business and shortening food supply chains in Swansea.

Case study 1 - Llannant Farm

Llannant Farm in Penyrheol, Gorseinon, has been in family ownership since 1941 after moving from a larger farming family in Neath. The Stevens family ran a profitable vegetable enterprise and local vegetable round from the 1940s up until the mid1990s covering local areas such as Penyrheol, Gorseinon, Penllergaer, Gowerton, Loughor, Grovesend and Pontarddulais.

The vegetables were produced alongside beef, dairy, sheep and pigs. The farm also used to comprise Allt y Graban farm (now Pontarddulais golf course), which was purchased in 1973. Currently Llannant is approximately 150 acres, with some additional land at Oxwich Castle Farm (30 acres at the moment but varies from year to year), used to make winter feed (hay or silage) for the cattle at Llannant.

The farm has 140 head of cattle on the holding (inc calves); this number has varied from 70 or so up to nearly 250 at the peak. There are currently 25 Holstein Friesians dairy cows including the second oldest cow in Wales; this is a reduction from milking 80-100 cows five or so years ago. The farm is assured for both dairy and beef, with annual inspections to confirm the accreditation under the FAWL scheme.

The farm milk contract is with First Milk in Haverfordwest, a farmer owned co-op that the farm has invested in. Given the reduction in milk volume, and the fact the farm keeps calves on the cows for longer than most, currently until weaning, the farm has taken a break with its milk contract, with the choice of either restarting next year or leaving the milk sector altogether.

Traditionally farms like Llannant, situated in the North of Swansea would have advantages of better local supply because of the density in population and the proximity to travel routes across South Wales. These are still beneficial advantages for distribution compared to areas in Gower. Food and farming policy should consider non-rural ward areas such as Penyrheol and Grovesend as prime models for investment when considering local supply.

The farm beef herd is currently at 100 animals and made up primarily of Black Limousin beef, this breed was chosen due to its marbling, quiet temperament, and excellent growth rates, producing a much more flavoursome beef. Previous method of sales was through Carmarthen Mart but the current method is to use an agent who takes them to whichever abattoir is paying well. The choices include Cross Hands, Haverfordwest or Merthyr. Merthyr and Cross Hands are potentially viable to self-transport for small numbers of cattle. With the produce being handled by different agents or organisations, it is not clear what proportion of the farm produce is sold locally, though it seems likely that it is mostly destined for the UK market.

The farm has identified a number of barriers to selling locally, including:

- The lack of local processing facilities such as abattoirs or dairy processing. The lack of local abattoir provision contributes to a lack of information on how to switch to sell more locally and a costly investment can prove a huge hurdle, especially in dairy if the market is not resilient and just switches back and forth on a whim. The issue of meat going to waste is big, as the costs associated are far larger than with vegetables
- The closure of Carmarthenshire Mart was a big loss; it was an opportunity to sell without using an agent and was more enjoyable to use. Marts are very communal places, and the lack of them, and interaction between the farming community can impact mental health.
- Shopping habits: householders are strongly price-conscious and with increasing levels of financial hardship there is greater resistance to potentially higher cost but better quality locally produced food

Andrew Stevens who farms alongside his father and brother explains that traditional farms like Llannant have always used practices to ensure efficiency and sustainability. “The farm is primarily low input, low output, which the farm believes is best for quality and sustainability. The dairy cows have been fed Trafford gold and brewers’ grains as by-products of the brewing industry in the past; the cows seem to do really well on them, and it adds to a circular economy. When the farm produced a lot of vegetables, any waste was fed to the beef cattle”.

The cattle are inside during winter and have the option of coming in during sustained wet periods even during spring/autumn, but they are out as much as possible if the weather is good. The cattle inhabit up to 80 cubicles that have rubber matting and bedded with straw in a large well ventilated shed. The farm catches rainwater and has put in a borehole.

As part of increasing the range of produce, the farm is considering testing a ‘pick your own’ vegetable enterprise. Bottling of milk was an option considered a few years ago and it may still be an option. The farm is exploring options of doing more locally with beef. A 400-year old barn could potentially be developed as holiday lets and a farm shop, but would require significant investment to be completed.

As part of a potential diversification strategy, the farm is considering whether to exit the dairy sector or to invest in equipment to enable the production of additional dairy products such as cheese or yoghurt. However, there are risks associated with this decision, with volatile prices and the equipment costs having to be factored in.

Andrew has an optimistic perspective on the future of local farming and food in Swansea. Despite challenges of paperwork and legislation, there is a great story to tell in Swansea and Gower, and across Wales. “Environmental schemes will be necessary in the coming years, but these must work with food production and not against it and not come at the expense of agricultural jobs. On the sustainable front, meat and dairy can certainly play a huge part, it's what makes up the majority of our agricultural landscape.”

Swansea and Gower is made up of smaller, primarily family run enterprises that cannot compete with the likes of the Vale/Pembroke on a scale and certainly not when compared with some of the English arable farms but there is a tight-knit, proud and hardworking local agricultural community and a very supportive consumer base (for the most part) as well as a really good backstory. If mindsets change on shopping locally, and farms can produce quality sustainable produce at suitable price points and enable consumers to be able to afford that price point, then the future is bright.

Case study 2 - the need for local abattoirs

The Sustainable Food Trust carried out research into the UK's network of small abattoirs in 2018 and found that the small-scale sector was near collapse.

The report concluded that:

1. The support of Westminster, devolved and local governments is necessary to support and develop small-scale abattoir provision across the UK
2. Regulations were needed to enable and support the development of mobile and farm-based abattoirs
3. A taskforce be set up to coordinate action and represent Government, the industry and householders

The policy director of the Sustainable Food Trust, Richard Young, said:

> *"Local abattoirs play a vital role in all rural communities where farm animals are kept. When they close, both animals and meat have to be transported much further. This is bad for animal welfare and bad for the environment. It also threatens the ongoing renaissance of local food cultures. On my own organic farm, I have had to change abattoirs nine times over the last 30 years in order to keep our farm shop supplied with the meat from our own animals, as seven of those closest to me have closed and two became unsuitable for other reasons. I now have to take our animals almost 40 miles to get them slaughtered and it costs a great deal to get the carcases delivered back to our shop"*

Case study 3 - Square Peg, an independent cafe

Square Peg, an independent café in Swansea has cited locally sourced produce as an important part of their ethos and success over the past few years. The café showcases an impressive brunch menu that uses seasonal produce such as beetroot puree on local sourdough instead of relying on imported alternatives such as avocados.

Square Peg was founded in 2015 with a vision to bring together the local community and serve great food. The organisation operates as not for profit and has a core value covering food ethics and maintaining work/life balance for all employees.

The pandemic gave the staff at Peg time to slow down and reflect on the future of the café. Founder Matt Crome states "Having to react to constantly changing regulations and opening and closing during Covid was difficult. Although the café was doing great pre-pandemic, we wanted to make sure that on reopening, we got every element of the business right. By condensing the menu and focusing on our team's needs, we have had the time and energy to produce a creative new menu showcasing seasonality and flavour". The change has been received well by the Peg community and although the café now operates over fewer hours per day, sales have increased, and the staff have more flexibility and better balance.

Peg are now firmly situated on the Swansea good food and coffee circuit and have diversified into coffee training, helping other local businesses get off the ground. The team are always pushing the boundaries for food sourcing and has recently teamed up with a new grower on Gower to curate a new seasonal menu. The partnership requires an initial meeting to map out what the café uses and the projected ordering schedule throughout the next growing season. The grower can then plan their schedule, prepare a planting calendar and can calculate a business growth plan. This is a great example of how two businesses can apply the farm to fork model and still benefit economically.

A suggestion to showcase this partnership within networking and local food workshops would be advised to assist with the shortening of food supply chains at a local, small-scale level.

Case study 4 - Hoogah, an independent eatery

Hoogah is a Scandinavian-inspired slow food eatery based in Brynmill Swansea. The businesses offer a diverse menu and benefits from breakfast, brunch, lunch and evening trade.

Hoogah is also co-owned by neighbouring business Little Valley Bakery, who supply all sourdough-based goods. This partnership has, in essence, been the key to their success with their main ingredient sourced right next door, at a fraction of the cost.

Serving sourdough pizzas, pretzels and a brunch menu has allowed the team to experiment with weird and wonderful ingredients. Seasonality plays an important role and although it takes more time to source and prepare, the freshness, flavour and taste make it worthwhile, and the customers keep coming back for more.

Hoogah references transparency as an important factor within the brand's ethos. Ange states “We have a strong customer base who trust our overall morals and we make sure we clearly communicate what we are putting on the plate. The food supply industry is complex, not everything can be organic and not everything can be local, but we work hard to make sure we source the very best produce possible and balance those factors”.

Considering locality plays a huge part of the sourcing process, however, Hoogah do rely on imported products such as fruits for cocktails and tomatoes for pizza bases. For the products that are imported, Hoogah ensures provenance of the product and considerations such as low intervention within the process and supply chain, fair trade and of course flavour are met.

“Tomatoes can grow all year round in Spain and continental supply doesn’t mean that product unethical if the product can grow in its natural environment and can be preserved naturally it might be a better option for the business” Ange also states that although local has its merits, local products produced intensively might not fit the bill.

Crowdfarming is an initiative that allows businesses and households to buy directly from specialist producers in bulk from all over the world. The scheme celebrates the food producer and removes intermediaries from the food supply chain. Restaurants could utilise platforms like this for farm to fork supply for imported specialist ingredients.

The reality of sourcing everything local can be unrealistic for many eating establishments. Consistency of the product, seasonality and availability can often make it difficult for hospitality businesses to include the menu. Logistics can be an issue for small scale suppliers, larger suppliers can compete with availability, price and regular deliveries. Constantly changing the menu for each season is time consuming. “Ordering from a larger supplier is far easier, Chefs and business owners are already working every hour under the sun and sourcing, ordering and managing the accounts from multiple small-scale suppliers can be inefficient”.

Hoogah has experienced issues with working with small scale suppliers first hand but insists that that extra effort pays off. They can overcome some of these issues by partnering with creative chefs that are adaptable to what comes through the kitchen door and recommend working with businesses that have a year-round supply as a great starting point for other businesses looking to adapt. The Ruben is one of Hoogah’s best sellers and the main ingredient is grass fed beef from Gower, flash frozen and available all year round.

“Slow foods cost more and take more time to source; however, we would not compromise on the quality and are committed to our original values”. Being big believers that good food should be accessible to all, Ange and the team have been conscious when setting the price, especially during the cost-of-living crisis. The business is not interested in cutting corners and plans to diversify with more events and specialist local food nights to counter the recent price hike.

“If businesses are going to commit to a sustainable future, they are going to need to be incentivised. A reward-based system on business ethics such as reduced rates should be explored”. The staff at Hoogah believe in a transparent food system and would like to see clearer communication when promoting food sourcing. A ‘scores on the door’ rating system could be beneficial for promoting shorter supply chains. “it’s easy for businesses to state they support the locals; however, it might be worth digging a little deeper. Does local mean local supplier? Where does the supplier source their produce? The grey areas need addressing and times are changing. People want connection, they are going to want to know more about what they eat and where it comes from.”

Hoogah are setting a high standard for local and ethical food sourcing and believe that the future of local food in the city is positive. “People have a deeper knowledge of good food and are looking for quality and flavour, if we can celebrate local food heroes and sustainable brands through grassroot marketing, the good food movement will grow”. Initiatives such as Brand Swansea are piloting a project that helps small businesses tell their story through digital media. Cross partnership relationships with Swansea Council for marketing could help showcase these brands and utilise facilities such as public advertising spaces, social media platforms or venues such as the new Arena.

Case Study 5 – Gower Salt Marsh Lamb; Agri Tourism and direct sales

The rural parts of the county are characterised by agriculture and tourism, aspects which are often highly complementary in business development and diversification. For example, many Gower-based businesses have capitalised on this with offerings of farm business products or services to holidaymakers.

Gower Salt Marsh Lamb is a Family run farm situated at the end of North Gower. The sheep graze on this tidal marsh and gain their main nourishment from this unique pasture, which consists of saltmarsh grasses, samphire, sorrel, sea lavender and thrift.

The unique environment where the sheep graze gives the meat its distinctive and very special flavour that is so sought after, by connoisseurs of fine meat, top chefs and restaurateurs alike.

The farm's main outlet is direct sales nationwide online and through the small onsite farm shop. The farm also benefits from linking with other local businesses such as Gower Brewery for mini festivals and visitor camping during the summer months.

The farm is home to Weobley castle and attracts over 4000 tourists every year. Having a tourist attraction at the site helps with direct sales but Will insists that marketing the business, especially through TV and media has been a large part of the success. “Not everyone has a unique location, but people love great food, if you can showcase this, they will come”.

In 2021, the combination of outstanding produce, unique location and the Pritchard family were awarded the geographical index status. The award was the UKs first and celebrates quality, provenance and gives the producer exclusivity to the name of the brand. The status is comparable to champagne in France and Parmigiano Reggiano in Italy.

Will, who runs the farm has stated “This is a big win for Gower and the exposure has led to more business and interest in our brand. We are proud of the recognition and our farm will continue to produce high quality lamb directly through the website.”

The farm has also seen a dramatic increase in trade and visitors since the accreditation and Will believes this is the beginning of big things for North Gower, setting the standards for neighbouring food producers. “We would love to see other food and drink producers in the area gain geographical recognition, North Gower has a history of producing exceptional food and further recognition would help the area thrive”.

Case study 6 - Ty Siriol; small farm directly supplying meat

Ty Siriol Pork is a 12-acre, family run farm based in Pontarddulais, Swansea. The farm manages a herd of Welsh pigs that are farrowed to finish outdoors.

Ty Siriol sells their produce from farm to fork through online website sales and through produce markets across South Wales. Half of the farm's supply would go to the third sector and their pork belly was a notable dish across some of South Wales’s favourite restaurants. During covid the farm lost half of their sales outlets and were forced to focus on direct sales.

Suzy has described the pandemic as a big turning point for the business, the initial jump in sales motivated the team to build a website and farm, produce and deliver the meat themselves. The couple have stuck to their guns and have continued with their farm to fork approach. The move to direct supply has allowed Martin and Suzy to maintain a manageable workload whilst slowly growing their business. The model allows them to maximise profits and produce minimal or no waste through their nose to tail approach.

“Restaurants usually want a certain cut, and a lot of it! This puts a lot of pressure on small scale producers to keep up with unrealistic demands”.

A project called Cook24 commissioned a series of fast track, artisan food courses last year with the aim to tackle the staffing crisis in hospitality. Exploring a local food workshop locally could encourage chefs and start-ups to consider the farm to fork approach and gain a better understanding of small-scale food processes such as using the whole animal on the menu.

A resurgence in the local produce market scene in 2014 was a big boost for small scale farmers such as Ty Siriol.” Although the scene is still very popular the markets cater more towards street food and crafts”. For this reason, Martin attends produce markets outside of Swansea with 75% of the farm's produce leaving the area. Although the produce is consumed relatively local it would be important to research further into food retail at produce markets in Swansea.

There is a strong indication that people want access to local food outlets, however, price and convenience is a competitive factor when it comes to food choice. It would be worthwhile to investigate how Swansea Market could assist with more local sales or if a Food Hall with ‘everything in one place’ could work for small scale producers like Martin and Suzy. Swansea Council will be exploring the idea of running an online service to generate more sales from Swansea Market and to give the consumer an easier way to shop for local produce.

The welfare of the animals is of huge importance at Ty Siriol and Martin and Suzy have preferred to set their own parameters for animal health. “Certain accreditors would need us to travel over two hours to a certified slaughterhouse which would be unfair for the animals and unnecessary food miles”. Suzy has stated that every farm is different, breed varies and there should be more onus and trust on the individual farmer. “If more people shopped locally, they would get to know their local farmer and know how their food was made”.

Rising costs and fast paced business can force shops and restaurants to save where they can and look for cheaper alternatives or put pressure on supplies to lower prices. This is a situation many farmers find themselves in and can result in the farm operating at a loss. Martin and Suzy are enjoying having more flexibility and control of the end price for their products.

The farm has received support from organisations such as Menter Moch and although funding for that scheme has ended the team has gained practical knowledge that includes marketing support, animal health plans and biodiversity for the farm. Exploring the need for wider farming support at a local level could assist local farmers and start-ups with hands-on knowledge to succeed.

Ty Siriol have tried and tested many models and believe they have found the solution that works best for them. They believe that Swansea has a strong geographical landscape for small scale food production “The history, climate, highland, low land, marshes and peninsular is a perfect environment for a thriving local food system.

The cost-of-living crisis has meant feed, and material have increased but the couple have a positive outlook insisting that there is always a way around. “Farming is a lifestyle and there are always different challenges thrown our way. Small scale farming is not the route to take if you are looking to get rich quickly but finding value in loving what you do makes it all worth the while". Suzy finds solace in working with animals, being outdoors and having the freedom to live and work in the wild. "You can't get much better than that!"

Case study 7 - Shepherds; farm to shop

The Shepherd family have a rooted connection with growing in Swansea, the farm started when David Shepherd rented a field in Port Eynon over 50 years ago and built a market garden. The business would mostly supply a busy Swansea Market with fresh seasonal veg. In the early 90s, the family decided to open a field to fork shop venture in Gorseinon Market and have continued to sell their veg at the location to this very day.

The shop sits at the front of the old market and although the rest of the market is now gone, the shop has a prime location on Gorseinon High Street. Seasonal produce from the farm takes a front seat in the shop known as Shepherds. Emma Shepherd, daughter of David, who has run the shop since day one, explains that the business has a tier process for supply "produce from the farm takes priority, then we also buy off other local farms for the produce we cannot grow. We will then use a local supplier to get us produce such as apples and pears from the UK, finally, we will buy imported goods such as veg with a short UK growing season and fruit".

Although local produce has a principal role at Shepherds, Emma needs to also sell fruits and imported veg products to keep up with demand and cater for everyone's needs "we are a long way away from eating seasonally and it is important to give customers the choice".

Half of the produce from the farm will go through the shop however the business has built a delivery route and Emma is able to deliver to local restaurants and eateries on the way into work. "Gower veg used in Gower pubs and restaurants; it just makes sense."

Gorseinon high street also has a long history of independent businesses and the community work together to support one another. "We supply five businesses on this street alone, everyone looks after each other, we are lucky to still have this local spirit here in Gorseinon as many neighbouring high streets are empty."

The farm also works with local wholesalers, who can get the produce further afield. The vast network of local supply that the Shepherd family have built over the years is the reason the business is still going strong. The impressive range displayed at the shop can also be used within their veg boxes, go to restaurants and even nationwide. "One of our suppliers who delivers to the shop also takes our farm produce to Cardiff for wholesale across the UK". Using smart logistics could also be explored for a more efficient local food system.

The farm has recently been involved in the Field to Fork project, which was brought together by 4theRegion and Castell Howell. A collective of farmers on Gower successfully supplied the ingredients to feed Bishopston School for one day. The pilot project includes six local producers and the procurement team at Swansea Council ensured that the project adhered to safety standards. The project aims to provide a model for local sourcing within public services and schools.

Emma states "Education is key, if we want people to eat better, we need to learn about where our food comes from. The obvious place to do this is through our schools."

The family do all the work themselves; a twelve-hour day is a regular occurrence between the shop and farm and the family can usually find themselves up extra early picking and fulfilling orders. Emma insists that the job is hard work, but they have found a way to make it operate over the years, they have proved resilience and earned their stripes.

For the future of local food in Swansea, Emma believes that building a larger network of food businesses that are all talking to each other would be a good basis for growth. The Shepherds are not slowing down anytime soon and want to expand on what they grow at the farm. “It would be great to plant some Padron Peppers this season in time for the summer, it is our favourite dish on the Nomad Bar and Kitchens menu, and we would love to add it to the weekly order”.

Regenerating high streets could be a key part of shortening food supply chains; Gorseinon and Mumbles both retain a local food scene with independent butchers, bakers, and greengrocers. The new developments and street food pitches that run from the city centre to Mumbles could be a key focus for local food trails. The newly illuminated promenade could facilitate night and evening trade. This could go hand in hand with promoting the green economy, travel and tourism. Utilising cycle locations such as the extended Blackpill to Pontarddulais route to navigate trade to local businesses could be marketed as a ‘family days out’.

Exploring these areas as individual case studies could promote more direct sales and a circular trade between businesses.

Bibliography

1. Haven-Tang C, Thomas A, Fisher R. To What Extent Does the Food Tourism ‘Label’ Enhance Local Food Supply Chains? Experiences from Southeast Wales. Tour Hosp. 2022 Mar;3(1):153–60.
2. Green L, Ashton K, Jones AT, Fletcher M, Morgan L, Johnson T, et al. Rising to the Triple Challenge of Brexit, COVID-19 and Climate Change for health, well-being and equity in Wales. :52.
3. Food security briefing [Internet]. Wales Environment Link; [cited 2022 Aug 23]. Available from: https://waleslink.org/wp-content/uploads/2022/03/WEL-Food-Security-Briefing_-Final.pdf
4. Sanderson Bellamy A, Furness E, Nicol P, Pitt H, Taherzadeh A. Shaping more resilient and just food systems: Lessons from the COVID-19 Pandemic. Ambio. 2021 Apr 1;50(4):782–93.
5. Black J, Maye D, Krzywoszynska A, Jones S. How is “the local” framed in UK system food debates? A review of mainstream and local food sector reports during the Covid-19 pandemic [Internet]. How is “the local” framed in UK system food debates? A review of mainstream and local food sector reports during the Covid-19 pandemic. Zenodo; 2022 [cited 2022 Jun 5]. Available from: https://zenodo.org/record/6378946#.Yl7BDsjMKUl
6. United Kingdom Food Security Report 2021: Theme 2: UK Food Supply Sources [Internet]. GOV.UK. [cited 2022 Aug 26]. Available from: https://www.gov.uk/government/statistics/united-kingdom-food-security-report-2021/united-kingdom-food-security-report-2021-theme-2-uk-food-supply-sources
7. Mert-Cakal T, Miele M. ‘Workable utopias’ for social change through inclusion and empowerment? Community supported agriculture (CSA) in Wales as social innovation. Agric Hum Values. 2020 Dec 1;37(4):1241–60.
8. Verfuerth C, Sanderson Bellamy A. Accessible Veg [Internet]. 2022 [cited 2022 Aug 25]. Available from: https://orca.cardiff.ac.uk/id/eprint/151114/1/Accessible%20Veg%20for%20web.pdf
9. Wayback Machine [Internet]. 2021 [cited 2022 Aug 24]. Available from: https://web.archive.org/web/20210903172751/https://communitysupportedagriculture.org.uk/w

p-content/uploads/2021/06/At-a-Glance-20-21-Final.pdf
10. Postcode to Parish to Ward to Local Authority District (December 2011) Lookup in England and Wales - Overview [Internet]. [cited 2022 Aug 23]. Available from: https://www.arcgis.com/home/item.html?id=c4aeb11ff5b045018b7340e807d645cb
11. Agency FS. Search a local authority area | Food Standards Agency [Internet]. [cited 2022 Jun 25]. Available from: https://ratings.food.gov.uk/search-a-local-authority-area/en-GB/Wales
12. Population [Internet]. Swansea. [cited 2022 Jul 28]. Available from: https://www.swansea.gov.uk/population
13. Bowhouse • Open Food Network [Internet]. Open Food Network. [cited 2022 Jul 27]. Available from: https://about.openfoodnetwork.org.uk/bowhouse-2/
14. Aberystwyth Food Hub (Online Farmers' Market) [Internet]. [cited 2022 Jul 27]. Available from: https://openfoodnetwork.org.uk/aberystwyth-food-hub/shop
15. Cusgarne Organic Farm [Internet]. cusgarneorganicfarm. [cited 2022 Aug 24]. Available from: https://www.cusgarneorganicfarm.co.uk
16. Tamar Valley Food Hub • Open Food Network [Internet]. [cited 2022 Jul 27]. Available from: https://about.openfoodnetwork.org.uk/tamar-valley-food-hub/
17. Cambridge Food Hub [Internet]. Local Food Ecosystem. [cited 2022 Jun 8]. Available from: https://localfoodecosystem.co.uk/cambridge-food-hub/
18. In My Back Yard [Internet]. [cited 2022 Jul 27]. Available from: https://openfoodnetwork.org.uk/inmybackyard/shop
19. Local Food Networks – Making Them Real [Internet]. 2022 [cited 2022 Jul 27]. Available from: https://www.youtube.com/watch?v=zLO5J0Oq7bM
20. Oldfield E. Jobs axed at Riverford with “rising costs” blamed [Internet]. DevonLive. 2022 [cited 2022 Oct 31]. Available from: https://www.devonlive.com/news/cost-of-living/jobs-axed-riverford-rising-costs-7720499
21. Welsh Foods July 2022 [Internet]. [cited 2022 Aug 3]. Available from: https://www.castellhowellfoods.co.uk/wp-content/uploads/Cat/WelshFoodsJuly2022/html/index.html?refUrl=https%253A%252F%252Fwww.castellhowellfoods.co.uk%252F
22. Welsh Food, Delicatessen, Food Wholesaler and Distributor North Wales [Internet]. [cited 2022 Aug 24]. Available from: https://www.blasarfwyd.com/
23. Assessment of the potential for aquaculture [Internet]. GOV.WALES. [cited 2022 Jun 4]. Available from: https://gov.wales/assessment-potential-aquaculture
24. Restoration & Research | Mumbles Oyster Company, Swansea [Internet]. [cited 2022 Jun 4]. Available from: https://www.mumblesoystercompany.co.uk/research.php
25. Swansea Bay Fisheries Local Action Group (SBFLAG) [Internet]. Swansea. [cited 2022 Jun 10]. Available from: https://www.swansea.gov.uk/sbflag
26. Seafish Wales Advisory Committee (SWAC) [Internet]. Seafish. [cited 2022 Jul 28]. Available from: https://www.seafish.org/about-us/working-locally-in-the-uk/working-with-the-seafood-industry-in-wales/seafish-wales-advisory-committee-swac/
27. Wales Seafood Industry Dashboard [Internet]. [cited 2022 Jul 28]. Available from: https://walesdashboard.wfa-cpc.wales/#
28. Clwstwr Bwyd Môr Cymru / Wales Seafood Cluster [Internet]. [cited 2022 Jul 28]. Available from: https://www.facebook.com/walesseafoodcluster/
29. The Shellfish Centre - Welcome [Internet]. [cited 2022 Jul 28]. Available from: https://www.shellfish.wales/
30. Sole of Discretion • Open Food Network [Internet]. Open Food Network. [cited 2022 Aug 25]. Available from: https://about.openfoodnetwork.org.uk/sole-of-discretion/
31. Kumar S, Talwar S, Murphy M, Kaur P, Dhir A. A behavioural reasoning perspective on the consumption of local food. A study on REKO, a social media-based local food distribution system. Food Qual Prefer. 2021 Oct 1;93:104264.
32. Pilar L, Balcarova T, Rojik S, Ticha I, Polakova J, editors. Customer experience with farmers’ markets: what hashtags can reveal. Int Food Agribus Manag Rev. 2018;
33. Search | VisitWales [Internet]. [cited 2022 Jul 28]. Available from: https://www.visitwales.com/search?search=food%20festival&f%5B0%5D=sector%3A5003
34. Themezinho. aqum [Internet]. aqum. [cited 2022 Jul 28]. Available from: http://www.themezinho.net/aqum

35. Oystermouth Food and Drink Festival - Enjoy Swansea Bay [Internet]. Visit Swansea Bay. [cited 2022 Jul 28]. Available from: https://www.visitswanseabay.com/events/oystermouth-food-and-drink-festival/
36. Pennard Carnival [Internet]. [cited 2022 Jul 28]. Available from: http://pennardcarnival.org.uk/programme.htm
37. Homepage | Love Trails Festival 2022 [Internet]. [cited 2022 Jul 28]. Available from: https://www.lovetrailsfestival.co.uk/
38. Gower Gluttony Food & Craft Festival [Internet]. [cited 2022 Jul 28]. Available from: https://www.facebook.com/gowergluttony/
39. Gower Chilli Festival [Internet]. Eat Drink Seek. [cited 2022 Jul 28]. Available from: https://www.eatdrinkseek.co.uk/event/gower-chilli-festival/
40. Gower Good Food Festival - Enjoy Swansea Bay [Internet]. Visit Swansea Bay. [cited 2022 Jul 28]. Available from: https://www.visitswanseabay.com/events/gower-good-food-festival-2/
41. Swansea Street Food Festival - Enjoy Swansea Bay [Internet]. Visit Swansea Bay. [cited 2022 Jul 28]. Available from: https://www.visitswanseabay.com/events/swansea-street-food-festival-2/
42. Swansea Bay Pop-Up | Swansea food and drink stalls under our big top [Internet]. Swansea Bay Pop Up. [cited 2022 Jul 28]. Available from: https://www.swanseabaypopup.co.uk/
43. National Laverbread Day [Internet]. National Laverbread Day. [cited 2022 Jun 7]. Available from: https://www.laverbreadday.co.uk
44. Sitaker M, Kolodinsky J, Wang W, Chase L, Kim J, Smith D, et al. Evaluation of Farm Fresh Food Boxes: A Hybrid Alternative Food Network Market Innovation. Sustainability. 2020 Dec 12;12:10406.
45. Wheeler DA. Covid-19 UK Veg Box Report. Food Found. :12.
46. Bulk Vending Systems | Eatsmart Drinksmart Besmart | Coffee Vending Machines | Table Top Coffee Machines | Fresh Milk Coffee Machines | Snack Vending Machines | Cold Drinks Vending Machines | Fresh Food Vending Machines | In-Cup Systems | Refurbished Vending Machines | Water Coolers | TY COFFI POD OR TOWER [Internet]. [cited 2022 Jul 27]. Available from: https://www.bulk-vending.co.uk/
47. Farm-Tastic Milk [Internet]. [cited 2022 Jul 27]. Available from: https://www.facebook.com/farmtasticmilk/
48. Gregory R. Local farm launches innovative “zero mile milk” in Cowbridge [Internet]. 2022 [cited 2022 Jul 27]. Available from: https://www.wales247.co.uk/local-farm-launches-innovative-zero-mile-milk-in-cowbridge
49. Evans H. New milkshake vending machine gives “modern twist” to old milk round [Internet]. North Wales Live. 2021 [cited 2022 Jul 27]. Available from: https://www.dailypost.co.uk/news/north-wales-news/new-milkshake-vending-machine-denbighshire-22214753
50. Llaeth Jenkins – Milk [Internet]. [cited 2022 Jul 27]. Available from: https://llaethjenkinsmilk.co.uk/cy/
51. Milk Vending Machine - Fresh Organic Milk To Go - Llangollen [Internet]. Llandyn Holiday Park. [cited 2022 Jul 27]. Available from: https://llandyn.wales/milk-vending-machine/
52. Fforest Farm Milk [Internet]. [cited 2022 Jul 27]. Available from: https://www.facebook.com/FforestFarmMilk
53. Warsaw P, Archambault S, He A, Miller S. The Economic, Social, and Environmental Impacts of Farmers Markets: Recent Evidence from the US. Sustainability. 2021 Jan;13(6):3423.
54. Farm 2 Facts | Grow Your Farmers Market With Us [Internet]. Farm 2 Facts. [cited 2022 Aug 25]. Available from: https://farm2facts.org/
55. MarketWurks - Modern Farmers Market Software [Internet]. MarketWurks. [cited 2022 Aug 25]. Available from: http://marketwurks.com
56. Innovative Food Hubs | Social Farms & Gardens [Internet]. [cited 2022 Jul 28]. Available from: https://www.farmgarden.org.uk/resilient-green-spaces/innovative-food-hubs
57. Homepage Closed Store | The Food Collective [Internet]. [cited 2022 Mar 11]. Available from: https://www.cowbridgefoodcollective.co.uk/homepage-closed-store/
58. Order from local producers of food and drink [Internet]. South Wales Food and Drink. [cited 2022 Jun 4]. Available from: https://southwalesfoodanddrink.com/
59. louisedenham. About [Internet]. Food Vale. [cited 2022 Jun 6]. Available from:

https://foodvale.org/about/
60. Neighbourfood home [Internet]. [cited 2022 Jun 5]. Available from: https://www.neighbourfood.co.uk
61. Open Food Network [Internet]. [cited 2022 Jun 5]. Available from: https://openfoodnetwork.org.uk/
62. Sustainable Food And Beverage Procurement Services | UK [Internet]. Tried & Supplied. [cited 2022 Jun 5]. Available from: https://triedandsupplied.com/
63. Home [Internet]. Jaspels Fine Cider Makers. [cited 2022 Jun 4]. Available from: https://www.jaspels.co.uk
64. mySociety [Internet]. mySociety. [cited 2022 Jun 4]. Available from: https://www.mysociety.org/
65. MapIt : map postcodes and geographical points to administrative areas [Internet]. [cited 2022 Jun 4]. Available from: https://mapit.mysociety.org/
66. OpenStreetMap [Internet]. [cited 2022 Jun 4]. Available from: https://www.openstreetmap.org/#map=9/51.5924/-4.5071
67. uMap [Internet]. [cited 2022 Jun 4]. Available from: https://umap.openstreetmap.fr/en/about/

Acknowledgements

Afallen would like to thank the following individuals and organisations:

- My Society (64) for providing access to the GeoJSON mapping data for ward and county boundaries, via their MapIt portal (65)
- Everybody who has contributed to the OpenStreetMap project (66) and particularly to the uMap team at OpenStreetMap (67)
- Everyone who submitted their opinions or information via questionnaire or interview
- Staff at Swansea Council for their support
- Everyone involved in the local food movement more generally who have been extremely generous with their time and the use of their networks

Appendix 1

Questionnaire analysis

Rural respondents

Householders

What food facilities or events would you like to see locally that aren't currently provided?	
Farm food shop/ farmer market	17
Local meat market or butcher	5
More CSAs or local growing options	5
Food festival or events	5
Organic fruit and veg shop	4
Farm or local food shop	4
Delivery options	4
More local food in big supermarkets or used by restaurant chains, councils etc	4
More local shops stocking local produce	4
Publicity/promotion/education	3
Fresh fish shop, andor seafood festival	3
Better variety of gluten free and vegan foods	3
Don't know	3
Locally produced oat milk	1
Local milk delivery (milkman)	1
Supper clubs, cooking classes	1

How would you prefer to access local food?	
CSA	19
Local produce markets	24
Local produce shop or supermarket	35
Online - food hubs	5
Online - home delivery	6

Do you use specific restaurants for locally sourced menus?	
No	46
Yes	13
Sometimes	2

How often do you shop for locally produced food?	
Never	2
Seldom	10
Sometimes	25
Often	34
Usually	10

Why is shopping for local produce important for you?	
Local economy and/or jobs	58
Sustainability and/or environment, including food miles	41
Good quality and/or local provenance, including fewer pesticides/chemicals	31
Food security	6
Not important (price)	2

What sort of foods do you source locally?	
Raw ingredients	77
Locally produced food at a cafe, restaurant etc	2
None	1

What do you perceive as local food?	
Wales	22
Local neighbourhood	42
South Wales	49
City and County of Swansea	51

What is your average weekly spend on local food (in £)?	
0-10	17
11-30	29
31-50	22
51-70	4
71-90	4

Over 90	5

What is your favourite local food shop or brand?	
Cae Tan CSA	14
Farm shop, Murton	11
Bakery, Little Village	6
FarmCo	5
Shepherd's fruit and veg	3
Butchers, Tuckers	3
Premier Store, Linkside	2
Pobbles Pizza	2
Gower meadow beef	2
Gower grown fruit, veg and honey	2
Farmers' markets (Mumbles)	2
Farm shop, Penyfodau	2
Farm Shop, Dunvant	2
Coffee, Coaltown	2
Butchers (local, unspecified)	2
Bakery, Kittle	2
The V Hub	1
The Rowan Tree	1
The Garden Deli	1
Swansea market	1
Swansea Fresh Fish	1
Slade farm organic	1
Selwyn's seafoods	1
Scurlage shop	1
Penclawdd Cockles	1
Pasture perfect	1
Own garden	1
Ninth Wave	1
Mumbles greengrocer	1
Mochyn Mawr	1
Milkman	1
Llaeth y lan	1

Little black hen	1
Keith the farmer	1
Joe's Icecream	1
Gower Coast Meat	1
Gower brewery	1
Good For You Ferments	1
Gelli Farm	1
Frostys	1
Farmers' markets (Gower)	1
Farmers' markets (generic)	1
Farmers' market (uplands)	1
Farm, Paviland	1
Davies bakers	1
CSA (not specified)	1
Cover to Cover	1
Coffee, Gower	1
Coakleys fish	1
Butchers (Woolacotts)	1
Blaencamel Farm	1
Bishopston Farm	1
Big Meadow CSA	1
Banc Organics	1
Aldi	1

How do you guarantee local provenance?	
Ask the producer or retailer	38
Check the packaging	28
Only buy direct from farmer/producer	39
Trust the shop or retailer	38

What barriers do you experience in finding local food?	
Hard to get everything in one place	65
Cannot buy direct from producer	21

Parking in the right locations	19
Cannot find in local cafes, pubs, restaurants etc	18
Opening hours not convenient	17
Locations not accessible (cycle/walk/disabilities etc)	12
Cost	6
Local shops not selling organic	2
No local shops selling local produce	1

What is your understanding of local produce?	
Locally produced ingredients	51
All three (locally produced, locally made or any bought at local shops etc)	25
Locally made in the business/shop/restaurant etc	3
Any produce bought at local shops/restaurants etc	1

Producers

What would most improve your organisation's profitability or viability? This might be anything to increase sales, reduce costs, or reduce future business risks.

- Prioritisation of local food procuration, good and affordable advertising opportunities for small local businesses who don't have much spare cash.
- Better low or no cost markets to sell produce
- Increase sales
- Government support to pay for labour in first 5 years of a horticulture operation while it is still establishing sales. Any scheme must allow the employer to hire people of any age from any background, and allow part time working, as it is so hard to find staff at all to work in horticulture where they have to drive to get to work also.
- Weed and pest control to reduce costs improve production and quality. Have had 2 years of crop failure due to leather jackets and redshank/fat hen
- Direct to consumer, green energy generation, tourism
- Being able to market and sell direct to consumer or to local restaurants/shops. It's high risk to break from our dairy contract or change the way we do beef without ensuring that the market is there.
- Business adviser
- For the council to re evaluate certain regs to make it easier for smaller businesses to be able to diversify into other avenues
- Costs of fertiliser, feed, diesel, utilities and silage wrap reduced
- More local food purchasers
- Increase the price we get for our lamb or beef
- Financial support to diversify and to have easier opportunities to produce meat and milk for the community like schools, cafes, mobile units etc
- Funding for renewable energy
- Group buying, selling ie the old Gower growers set up
- reduce feed costs
- we are not for profit so grant funding during set up

What would be the best action(s) to put Swansea on the map as a food destination?

- Emphasise locality and quality
- Provide the excellent markets that we see in Europe full of local produce

- More local outlets
- Develop a local sustainable food label for producers, shops and restaurants and promote the scheme to locals and visitors
- We have some fantastic food producers across Swansea and we need to promote them! Larger scale farming happens in places like the Vale, Powys or Pembroke but we have a lot of history. Gower benefits massively from tourism and adding the name to food but there are many outstanding food producers outside of Gower too!
- Comprehensive website with links to everyone.
- Make it easier to host markets and to also help advertise local producers
- Excellent husbandry care and monitoring
- Use of products in national tv programs,
- Support farming
- Buying more from local farmers and not bigger companies
- To have an identified personnel officer to help facilitate diversification and knowledge of the area / other businesses that we could sell out pork, lamb , fresh milk to - reduce the barriers !
- A large farmers market/farm shop where only food produced in Swansea can be sold. E.g using all raw produce from farms/sea around Swansea.
- "Celebrate not just the beauty spots but also the food produced
- Gower used to be the garden of Swansea growing large amounts of vegetables etc along with prime meat from its fields and commons "
- real quality produce (not another label)

What proportion of your food production goes to local (Swansea City and County) customers?

- Around 50%
- 60 percent
- 90%
- 95% - the rest to a hotel in the Midlands which only buys from regenerative farms
- 50
- Hard to answer, milk previously sold to first milk dairy, meat is usually via an agent, last lot went to Whitland. Previously fruit and veg was always sold locally and we have been intending on selling milk from the farm gate for some time now.
- Hard to quantify due to our dairy contract and our beef usually goes to Celtic's via an agent.
- 1%
- None
- None
- 98%
- 50%
- Potato's and veg
- Less than 10%
- 0%
- 3%
- Very small
- 100%
- 100%

What would help you increase the amount of food that you can sell locally?

- More people knowing about us
- Consumer demand
- Increased marketing and local outlets
- More financial support to pay for staff. We have the infrastructure now and training support comes from Tyfu Cymru. We need more volume though to make the horticulture profitable and more time and expertise to help get the cropping right so that we are growing what people want and have enough available all year round.
- A large local slaughter house. More whole salers
- Advice, and grants for equipment.
- Grant funding to switch to a milk vending machine, pasteurising plant, cooler to store meat. Ideally a return of local abattoirs and a local customer base, either direct to door or link up with local restaurants.
- Advertising

- Less costs to the council
- Publicity, local signage
- Easier marketing
- Someone to buy it
- Good prices for locally grown lamb or beef
- See above
- Funding for equipment to allow us to sell 24hours/day.
- Access to large scale retailers
- more land (real free range chickens need mixed and open woodland to roam and forage)
- pick up hubs

Other comments

- As a low cost veg seller, I know the high market prices put off other sellers. I would love to see more vegetable producers at the markets as opposed to people that just buy in produce
- Many want to sell directly to consumers, but are unsure how to do so or cannot afford the extra equipment etc.. It can also be more of a volatile market. It could fit in nicely with a tourism business.
- I think many want to make the switch but it can seem very daunting. There are so many benefits, both environmentally and economically to local food but changing the way we do things and how people purchase can take time plus we still need to have a viable business at the end of it.
- We would love to sell all of our lamb boxes locally but find it hard to market direct to the public
- "As mentioned previously Gower is made up of small traditional family farms which have staged with the factory scale farming of recent years
- Where the land is excellently suited to all types of farming from dairy,beef , sheep and vegetables we struggle to gain any scale to be able to supply the large local suppliers
- We require a cooperative to be able to sell Gower Produce
- We could Achieve the scale larger retailers require
- Scale is key; an emphasis on growth is not helpful. If small producers become large, they lose most of the qualities that defined them. You want to encourage growth by proliferation of small businesses, not by turning small businesses into large businesses. Small businesses are most disadvantaged by being made to comply with rules and regs designed to deal with issues/risks thrown up by large businesses, and which often aren't an issue with small businesses. E.g. current Avian Influenza rules are intended to protect huge commercial poultry operations, whose 'free range' poultry rarely, if ever, leave the vast sheds they are crammed into, standing in their own waste for their whole 5-6 week lifespans.
- We are not yet producing (first crop will be in 2023) so some responses may not be indicative

Which of the following policies would most help your business grow?

A policy requirement for large food users to facilitate local producers	5
Agriculture support (workshops/planning advice/dedicated officer)	3
Allow small businesses exemptions from policies designed for large businesses	1
Better local information provision and networking	3
Support to access large food users, such as schools or hospitals	3

Which of the following local food supply chains do you currently engage with?

CSA	2
Food hubs	1
Keep Wales Tidy	1

Local or national wholesalers	1
Local shops	3
Marts	7
Farmers cooperatives	2
Supermarkets	1
Members of the public	1
Produce markets	2

How useful would access to communal equipment or services be? (e.g. shared van, mobile abattoir, Swansea food hub, communal business allotments, access to land)

Not useful	2
↑ ↓	0
	2
	4
Very useful	7

What support would you like to see Swansea Council introduce to support local food businesses further?

Allow small businesses exemptions from regulations designed for large businesses	1
Allowing better pesticides and herbicides	1
Bursaries for staff to gain qualifications	4
Financial support for equipment	11
Fast track production/cookery course	1
Financial support for branding/marketing	6
Access to multi-use kitchen/production spaces	2
Shared transportation for deliveries	3

Sellers

What would most improve your organisation's profitability or viability? This might be anything to increase sales, reduce costs, or reduce future business risks.

- Free publicity that would underline the wonderful and historical past of Gower, its artisans,

food suppliers and the importance of supporting local producers, the ecological and cultural importance of sustainable farming and food production.
- Quite simply to return to a reduced vat rate closer to the 12.5% that we had after the Covid lockdown.

What would be the best action(s) to put Swansea on the map as a food destination?

- The history and culture, the amazing produce, and the support of local artisan producers who respect the importance of farm to fork.
- Why not re invest in Swansea's marina area, try to support the local fishing community to rebuild and make Swansea the Newlyn or Padstow of Wales

What would help you increase the amount of produce that you obtain locally?

- More people should use the networking model that most Gower producers use...we speak to each other, support each other's business/ products
- An online platform with up-and-coming availability with livestock control where orders can be placed and delivered at a specific date mutually agreeable.

Any other comments?

- The Gower Heritage Centre is a very good model of supporting artisans and producers, it would be a good example of sustainability, cultural values and communication, and we would welcome any visitors who would like to consider or investigate a similar model.
- "The problem with something like this is that this would in my opinion be more aimed at pre prepared food products (akin to the Swansea food partnership) I would love to have something like this at a food producer/grower level.

Urban respondents

Householders

What proportion of your food is sourced from local (Swansea City and County) producers, such as local markets, farm shops etc	
Up to 10%	44
10-20%	42
21-30%	23
31-40%	7
41-50%	14
51-60%	9
61-70%	4

71-80%	5
81-90%	3
91-100%	4
As much as possible'	4

What would help you increase the amount of produce that you obtain locally?	
More local produce shops	54
Opportunity to purchase direct from farmers	28
Online ordering facility for local produce	27
More local produce markets, and/or events such as food festivals	25
Lower cost	17
All of the above	10
Delivery service	8
Convenience - 'big shop'	3
Parking	3
More pop-up markets	3
More local food in supermarkets	2
Better labelling on menus	1
More land/CSAs	1

What food facilities or events would you like to see locally that aren't currently provided?	
Food market and/or farmers' market	48
Local shops selling local produce	15
Festivals (various)	12
Bakery	7
Marketing, promotion and education of local options	4
Deli	4
Local food in supermarkets	4
Fresh fruit/veg shop	3
Online ordering facility for local produce	3
Delivery service	3
Collective shops	2
Events (apart from festivals)	2

Butcher	2
Fishmongers	2
One stop shop for everything	2
Producers' cooperative	2
Year-round weekend local food event	2
Cookery/fermentation classes	2
Vegan cafes/restaurants/events	2
Refill shop	2
Parking, cheaper/convenient	1
Food waste cafes	1
Fruit and veg boxes	1
Local food badge for shops and restaurants	1
Networking events for local growers	1
Purchase direct from farmers	1
Local dairy products	1

How would you prefer to access local food?	
Local produce shop or supermarket	106
Local produce market	87
Swansea Market	65
Online - home delivery	56
CSAs	55
Online - food hubs	46

Do you use specific restaurants for locally sourced menus?	
No	99
Yes	59
Sometimes/other	6

How often do you shop for locally produced food?	
Usually	32
Often	4
Sometimes	62

Seldom	24

Why is shopping for local produce important for you?	
Local economy and/or jobs	105
Sustainability and/or environment, including food miles	85
Good quality and/or local provenance, including fewer pesticides/chemicals	53
Food security	3
Not important	3

What sort of foods do you source locally?	
Raw ingredients	150
Locally produced food at a cafe, restaurant etc	108
Gifts	93
Ready meals	19
None	4
Other	3

What do you perceive as local food?	
South Wales	109
City and County of Swansea	87
Local neighbourhood	61
Wales	54

What is your average weekly spend on local food (in £)?	
0-10	50
11-30	48
31-50	34
51-70	16
71-90	8
Over 90	13

What is your favourite local food shop or brand?	

Swansea Market	24
Farm shop, Dunvant	19
FarmCo	15
Shepherds fruit and veg	15
Market, Upland	8
Cae Tan CSA	6
Choice is Yours	6
Butcher, Tuckers	5
Bakery, Little Valley	5
Market, Marina	5
Summit Good	4
Farm shops (generic)	3
Market, Mumbles	3
Bancs Organic	2
Big Meadow CSA	2
Butchers, Richards	2
Dilly's and Kristy's	2
Gower Brewery	2
Gower free range eggs	2
Joe's icecream	2
Local market	2
Ty Siriol Pork	2
Aldi	1
Asda	1
Brynmill Cafe	1
Butchers, Gowerton	1
Butchers, Karl's	1
Cariad's	1
Coop	1
Dragon	1
Farm, Nicholston	1
Farm, Penyfodau Fawr	1
Farm, unspecified	1
Farmers' markets (unspecified)	1
Fishmonger, Mumbles	1

Good for You Ferments	1
Gower butcher	1
Gower Coast Meat	1
Gower Cottage Brownies	1
Gower Dough	1
Gower Fudge	1
Gower pick your own	1
Gower porc	1
Inner Grace	1
Lidl	1
Little Black Hen	1
Llanrhidian veg stall	1
Pobbles	1
Sainsburys	1
Selwyn	1
Fishmonger (generic)	1
Tescos	1
Gower donuts	1
Tomos Watkins Brewery	1
Totally Welsh	1
Olive and Oils	1
Ty Llaeth	1
V Hub	1
Valley Mill	1
Butchers, Vaughan's	1
Watson & Pratt's	1
Hoogah	1
Williams	1

How do you guarantee local provenance?	
Trust the shop or retailer	87
Only buy direct from farmer/producer	72
Check the packaging	70
Ask the producer or retailer	58

Personal involvement	1

What barriers do you experience in finding local food?	
Hard to get everything in one place	117
Parking in the right locations	51
Cannot buy directly from producer	42
Locations not conducive to cycling, walking, people with disabilities etc	36
Cannot find in local cafes, pubs, restaurants etc	32
Opening hours not convenient	27
Price	11
Other	5
Not enough in local supermarkets	1

What is your understanding of local produce?	
Locally sourced ingredients	96
All three	55
Locally made in the business/shop/restaurant etc	8
Anything bought at local shops, supermarkets etc	1
CSAs	1

Producers

What would most improve your organisation's profitability or viability? This might be anything to increase sales, reduce costs, or reduce future business risks.

- If the local veg wholesaler would buy from local growers
- Access to affordable kitchen space and support with marketing
- local council/authority/university contracts and sales.

What would be the best action(s) to put Swansea on the map as a food destination?

- Enhance the shops and do pretty frontages to encourage people back into the town to buy local
- Investment in growing the culture of good-quality food/eating in Swansea
- Collective promotion

What proportion of your food production goes to local (Swansea City and County) customers?

- 100%
- 100%

- 75%

What would help you increase the amount of food that you can sell locally?

- Help to market our produce
- Support with marketing.
- Local awareness

Which of the following policies would most help your business grow?

- Support to access large food users, such as schools or hospitals, Agriculture support (workshops/planning advice/dedicated officer)
- Better local information provision and networking

Which of the following local food supply chains do you currently engage with?

- Swansea Market, Local shops
- Community Supported Agriculture, Produce markets, Local shops, Supermarkets

What support would you like to see Swansea Council introduce to support local food businesses further?

- Bursaries for staff to gain qualifications, Fast Track production/cookery course, Financial support for Equipment, Financial support for Branding/Marketing
- Fast Track production/cookery course, Financial support for Equipment, Financial support for Branding/Marketing, Access to multi use Kitchen/Production Spaces

Sellers

What would most improve your organisation's profitability or viability? This might be anything to increase sales, reduce costs, or reduce future business risks.

- Past change to Mumbles by introducing over night a large number of Chains has damaged the local artisan producer. Support for the local artisan business via Farmers Markets, improved marketing & promotion would help. We have had to take action by relocating from a High street venue as the business rates were crippling.
- Ideally limit the ever increasing amount of “farmers markets” as people only have so much money to spend , and these markets do contribute to less footfall in the city centre, and people only have one pot of money to spend .i know this is going against the current trend of farmers markets but they do affect Swansea Market especially the close ones like Uplands and Marina.
- Reduce costs
- Contracts with local Schools, hospitals, etc
- Shopping for the best products at affordable prices
- Advertising

What would be the best action(s) to put Swansea on the map as a food destination?

- Support local artisan producers not chains!
- Have lots of cookery demonstrations (Swansea chefs) and food tasting in places like the Royal Welsh Show , have pop ups in places like Borough Market etc .
- Promote the vast array of local businesses
- Sale quality food

What supply chains do you currently use?

- Mine is from Swansea Valley

- Poultry
- Chapple & Jenkins (Bristol)
- None, I'm selling Portuguese food

What would help you increase the amount of produce that you obtain locally?

- I think we do very well right now.
- Nothing really
- N/A
- Networking with local supplier/ producer's
- Lower delivery costs, minimum order. Being a same business I don't make the minimum order for most local suppliers.
- Not apply

What proportion of your food production is sourced from local (Swansea City and County) producers?

- Don't know
- About 90% of my cakes are local suppliers

Any other comments?

- It's all about publicity and spreading the word which I know is expensive , I live in Mumbles and was speaking to a lady that had lived in Mumbles for several years she had no idea we even had a market .
- We held a high street position for 10 years and the questions you ask here have been asked throughout those years but to no avail. What will change?

How many times a week do you get asked by customers about local produce in your menu or products?

- 1-5 times a week (two responses)

What local food producers do you currently use?

- Slaughterhouse in England
- Pixie Cakes, Nata's By Max

Appendix 2

Food projects and organisations

Local or regional	National
4theRegion	Black Mountains College
Bwyd Abertawe	Community Food Network Cymru

https://www.swansea.gov.uk/sbflag	Community Grown Food Action Plan
Menter a busnes (Cywain)	Farming Connect
Swansea Bay Good Food Circle	Food and Drink Industry Board
Swansea Environmental Forum	Food and Drink Wales
Swansea food partnership	Food Cardiff
	Food innovation Wales
	Food Manifesto Wales
	Food Policy Alliance Cymru
	Food Sense Wales
	Food skills Cymru
	Food4Growth
	Landworkers Alliance
	Lantra
	Open Food Network
	Our food
	OurFood1200
	Resilient Green Spaces
	Social Farms & Gardens
	Sustainable Food Places
	Urban Agriculture Consortium
	Wales Community Food
	Wales Real Food and Farming Conference
	Wales: food destination
	Welsh Food Clusters