

Developing Our Local Food Strategy

Sir Gâr

A Healthier, Wealthier and Greener Sir Gâr
'Regenerating the Garden of Wales'

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1. Executive summary

1.1 Introduction

This strategy development document provides the Draft Public Services Board (PSB) Food Strategy and Action Plan which has been identified within the context of challenges and opportunities in the local food system.

The need for a cohesive, holistic PSB Food Strategy has already been established at an early stage by the PSB Partners. This further work seeks to appraise the strategic guidance and main options for action plan delivery.

This strategy development document highlights the complexities of the food system in Carmarthenshire, the broad nature in which the PSB organisations impact this and how its current operations, policy and strategy could be improved with the development of a local food system strategy and recovery plan.

The Carmarthenshire Well-Being Plan 2023-28 has evidence, narrative, and action around food related issues, from poverty to climate change and community health. When combined with other food system mapping evidence and recent Foundational Economy Reports this highlights the strategic opportunities to contribute positively to all 7 National Well-Being Goals within a localised context.

Essentially the key message contained within this report is that **“a Local Food Strategy can play a pivotal role in delivering: sustainably produced and healthy food for everyone; better livelihoods and economic security of local producers; and support a transition to environmentally regenerative food production”**.

To ensure genuine and sustainable progression towards the common purpose, the strategy must reflect the needs of the operational food system including the community and private sectors. The broad reach of PSB Partners' key impacts and interventions are brought together in this document to maximise the opportunity, these can be actioned effectively by collaborative delivery plans.

The purpose of the Local Food Strategy has 5 key drivers simply categorised as.

- Creating a shared vision and mission through goal setting
- Preparing for the future - stability, resilience, and progression
- Creating a framework for reference through times of change
- Support internal and external alignment of multi-stakeholder action
- Detail the resources and action plan needed to achieve the goals

This strategy development document has not been created in a vacuum, the most pressing need is to contextualise recent local and national activity so we can develop a holistic plan of action. Within this report we don't seek to replicate the work of the UK Government commissioned independent review into the food system in the National Food Strategy: the Plan published in 2021¹, but it will certainly take account of the findings of; what is probably the most significant independent review of the national food system in our time.

1.2 Key and Definitions

Key

WG – Welsh Government

PSB – Public Services Board (Carmarthenshire)

CCC – Carmarthenshire County Council

HDUHB – Hywel Dda University Health Board

UWTSD – University of Wales Trinity Saint David

BSGF – Bwyd Sir Gâr Sustainable Food Partnership (strategic steering)

CFN – Carmarthenshire Food Network (operational membership)

Definitions

Local - Geographical area of Carmarthenshire

Regional - Geographical area of South and West Wales (Swansea, Carmarthenshire, Pembrokeshire, Ceredigion)

National - Geographical Area of Wales and UK

Sustainable Food - (there is no legal definition of this, but we work on the shared definition as being) - Food that is produced, processed, bought, sold or eaten in ways that:

- Provide social benefits, such as safe and nutritious products, and improve people's experiences of good quality food, for instance by growing and cooking it, which helps to enrich our knowledge and skills, and our cultural diversity.
- Contribute to thriving local economies that create good jobs and secure livelihoods – both in the UK and, in the case of imported products, in producer countries.
- Enhance the health and variety of both plants and animals (and the welfare of farmed and wild creatures), protect natural resources such as water and soil, and help to tackle climate change.²

Agroecology / Agroecological Food Production – The application of ecological concepts and principles to food production practices, managing interactions between plants, animals, humans and the environment for food security and nutrition. The diversity of practices within an agroecological

¹ [The National Food Strategy - The Plan](#)

² [What is sustainable food? | Sustain \(sustainweb.org\)](#)

system creates a more robust and resilient system that is less vulnerable to international market dynamics.³

1.3 Brief Overview

Understanding the Local Food System – The Influences, Actors and Issues to Resolve.

Shared Vision – “A Carmarthenshire Food System that produces, promotes and provides affordable, healthy and sustainable food fit for Future Generations”.

Set Ambitious and Long-Term Food Goals – Food for All, Food for Public Health, Net Zero Food System, Food Production for Nature and Climate, Sustainable Food Procurement, Food Sector Jobs and Livelihoods.

Create Clear and Measurable Objectives and Develop Policy Framework of support. – Home and Community, Public Sector Provision, Good Food Economy, Food Growing Opportunities, Environment and Governance.

Detail Key Intervention Opportunities – Impact Assessment, Audits of Provision, Sustainable Food Measures, Funding Landscape, Future Generations Menu, Social Value, Training Programmes, Social Prescribing, Community Eat-Well Projects, Rural Land Map and Use Framework, Food System Data, Pioneer Sustainable Health Models, Further Evidence-Base Required, Meeting Skills, Infrastructure and Innovation Demands.

Stronger Partnerships and Collaboration – between PSB Partners and the Wider Community (Food Networks and Strategic Partnerships), focus on a Project, Place and Partnerships Approach.

Monitor Key Indicators and Outputs – in line with the Well-Being Plan 2023-28

Further work needs to focus on deliverables and the interconnectivity of existing plans, teams and developing working groups.

³ https://www.wwf.org.uk/sites/default/files/2020-03/WWF_Full_Report_Food_Final_3.pdf

2. The Local Food System

2.1 PSB Summary

The local food system is interconnected between everything and everyone that influences and is influenced by the activities that involve getting food onto plates across the county. To better understand this process of farm to fork and beyond, this summary looks in more detail at the remit of the Public Services Board Stakeholders, predominantly within county lines.

There are four key areas of the food system we've identified for application of a Local Food Strategy, those being the:

1. Physical chain of activities between producer to consumer
2. Economic, political, environmental, health and social factors of influence
3. Many organisations, institutions and people involved directly and in-directly
4. Overlapping connections between these areas, where action or inaction has repercussions across the food system.

The policy landscape of Public Services Board stakeholders reaches out further than direct policy on food through procurement; land-asset management, planning, education and community services, net-zero carbon projects, economic development and regeneration teams to name just some of the main areas.

PSB anchors (CCC, HDUHB, UWTS/D/Coleg Sir Gâr) food-related spend £5.8m, £4.6m of which in the wholesale sector, this is 10 x more than any other sector, eg Manufacturing, Administrations, Accommodation and Food Service. Due to the main wholesale retailer being in the county the gap analysis shows relatively low leakage of public funds outside of the county and Wales. However, we know from recent research that this secondary leakage is likely to sit around the 60-70% mark. Taking into consideration the logistics provider's revenue takings and % into regional supply chain - leakage of public revenue in food at a minimum varies between £2-2.3m, this is the annual baseline for potential positive economic impact within current provision. The provenance and 'quality' of produce used within the current public sector supply chain is the largest contributing factor that works against local and national policy drivers.

Systems Thinking

"An integrative way to view a large and complex issue is part of a group or system of elements that function together as a whole" Karen L Higgins, Economic Growth and Sustainability.

Without clear national strategic guidance at present from the Welsh Government on a coordinated approach to local food systems development and continuous financial pressure on resources, many of the respective parts of the food system operate independently. Shared policy objectives, strategic planning and operational delivery across the Public, Private and Third Sector all have core values that set strong foundations for sustainable development of the local food system.

However, the current dis-connect has played a significant part in suppressing the rural economy through cost-driven public sector food provision that leaks the Carmarthenshire pound into a global

food supply chain. These impacts are broader than just economic value. Diet-related community health continues to depreciate as we inadvertently create a bigger market for what we now understand to be a nutritionally poor standard of food, in direct contradiction to what the local agri-food sector can and does produce.

2.2 Policy, Plans and Strategies

With food production at just 27% of the ecological footprint of Carmarthenshire, a cohesive local food strategy can lead regeneration through the production of socially valuable public goods, knitting together a target-driven culture of progressive partnerships and collaborative work streams.

The potential of Carmarthenshire to coordinate a food systems approach is larger than the sum of its parts. Underpinned by the breadth of plans/strategies, a collated strategy can support policy change to fortify the necessary transition for regeneration.

Food is an opportunity to deliver on shared objectives.

There is a common and cross-cutting theme for policies on health and well-being, education, poverty and inequality, environment and climate change, local economic development, tourism, regeneration, agriculture, procurement, and land management: **food**.

This strategy development document builds on policies and plans from different sectors and organisations to reflect, compliment, and drive forward objectives of existing strategy at national and local level. These policy documents offer the baseline framework, in-line with the Well-Being of Future Generations Act for an ambitious and evidenced based Local Food Strategy.

By setting this strategy development document and policy opportunity outline, we can consider all aspects of the local food system, interrelated in a single framework. Fostering cooperation across PSB stakeholders to increase efficiency and maximise successful delivery, advancing the policy objectives of numerous sectors.

References to the policies, plans and strategies noted below can be found in Appendices.

Themes

Health and Social

Local	National
Well-Being Plan 2023-28 (PSB)	WG Healthy Eating in Maintained Schools - Statutory Guidance 2014 (currently in review)
Family Support Strategy 2018-23 (Carmarthenshire County Council)	Healthy Weight, Healthy Wales Strategy 2022 (Welsh Government)
Tackling Poverty Plan (Carmarthenshire County Council 2023)	Age Friendly Wales, 2021 (WG)
Hywel Dda University Health Board Three Year Plan 2022/25 (A Healthier Mid and West Wales)	
Welsh Language Promotion Strategy 2022 (CCC)	

Ethical Employment in the Supply Chain Policy, 2020 (CCC)	
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Environmental and Climate Change

Local	National
Net Zero Carbon Action Plan, Project Zero Sir Gâr 2021 (CCC)	Net-Zero Wales Carbon Budget 2021-2025
Environment Act Forward Plan	Towards Zero Waste (WG)
Nature Recovery Plan	
Green and Blue Infrastructure Strategy (A Strategy for Greening 8 Town in Carmarthenshire, 2022. CCC)	
Waste and Resource Management Strategy, 2023 (CCC)	
Tree Management Strategy	
Strategic Plan for Pollinators	
Protection and Enhancement of the Natural Environment	

Economy

Local	National
CCC Economic Recovery and Delivery Plan 2021	A Vision for the Food and Drink Industry (WG 2021)
South Wales Employment and Skills Regional Plan (Regional Learning and Skills Partnership 2022)	Stronger, Fairer, Greener Wales 2022 (A Plan for Employability and Skills, WG)
The Visitor Economy	
Swansea Bay City Region Economic Development Strategy	
Sustainable Distribution - Settlement Framework	

Cross-Cutting

Local	National
CCC Procurement Strategy 2022	Welsh Government Cooperation Agreement 2021
Social Value Policy (CCC, HDUHB – in progress)	WG Social Partnership and Public Procurement Bill 2022

Moving Rural Carmarthenshire Forward (2019) (CCC)	Wellbeing of Future Generations Act, 2015 (WG)
	The National Development Framework 2020-2040 – Rural Areas (WG)
Cabinet Vision Statement 2022 - 2027 (CCC)	The National Food Strategy 2021(UK Gov)
Local Development Plan, 2018-33 (revised CCC)	Food Wales Bill – (WG in progress)
Transformations: Strategic Regeneration Plan for Carmarthenshire 2015-33 (CCC)	Community Food Strategy, (WG in progress)
Corporate Strategy, 2023 (CCC)	Public Sector Food Procurement Strategy (WG – in progress)
Council Transformation Strategy 2022, CCC)	
Strategic Equality Plan 2020-24	
Sustainable Food Strategies (Various)	
Social Enterprise Policy – in progress (CCC)	
Digital Transformation Strategy 2021-24 (CCC)	

Other Research Evidence Base

School Meals Scoping Paper and Action Plan (PSB 2022)

Carmarthenshire Anchors – Food Procurement (Carmarthenshire Public Services Board, February 2021)

Feasibility Study on Sustainable Logistic Models of Food Distribution in Southwest Wales (Miller Research May 2021)

Cook-Freeze Feasibility Study (2022)

Cwm Taf Health Board Food CPU Case Study (2021)

Census Results 2021

Good Food Nation Bill Scotland 2022

Contemporary Food Craft Feasibility Study 2019, Coleg Sir Gâr

Collaborative ‘SMART’ Food Manufacture Report 2020, LEADER

National Food Strategy Independent Review (2021)

Exploring the Innovation Prospects for Carmarthenshire (2022 Kevin Morgan, Dylan Henderson, Rick Delbridge)

2.3 The Local Sustainable Food Production Landscape

Carmarthenshire spans over 206,000 hectares of agricultural land, with 24,000 as arable. To put this into context, to meet the demand of the public plate alone; we would need just 160 hectares to produce the entire vegetable supply chain within school meals. Currently we only produce vegetables on about 0.08% of available land here in Wales, yet South-West Wales holds 35% of the arable land in Wales, however in Carmarthenshire we only produce commercial vegetable crops on 0.001%.

How we locally produce this food however is a shining example of how small ecosystems can be extremely productive. One local regenerative example produces 3.6 tonnes per year (38 week growing season) from less than 2 acres on land that would've previously been deemed 'un-arable' and only suitable for hillside grazing.

Sustainable Meat and Dairy Producers are spread patchwork over the county and account for approximately 2,000 hectares. (10 x that of vegetable production).

Most of this sustainable food production goes to 2 markets – the closed 'box market' for vegetables is direct to customers, with some into independent shops restaurants and the 'export' markets into England through cooperatives or wholesalers.

The Sustainable Food Production Sector is very small compared to the more commercially focussed local Beef, Lamb, and Dairy sector. The economic impact has previously been suggested "for every £1 invested in farm support, farming delivers £7.40 back into the local economy through purchase of goods', however to fully capitalise on this opportunity we need to enable the onward supply chain towards a sustainable, foundational and circular economy⁴.

Here-in lies some of the issues we need to overcome, it's not only the imports of food provision we are addressing, but also the imported inputs needed to support a non-sustainable food production sector. Local Agriculture enterprises are businesses, mostly family farms and they need to make a profit. They cannot be expected to adopt more sustainable practices that could negatively affect their profitability, even if only in the short term. We must support in every way we can this change, from business support to external funding opportunities, secure markets and more, including protection from unfair competition (cheap exports).⁵

This sustainable food production is under-achieving in growth and market penetration. Yet the food provision sector (restaurants, food distributors) that utilise these products achieve market stability and commercial viability, alongside national recognition – building the brand and flying the flag for Carmarthenshire.

⁴ [UK: Animal feed import value UK 2003-2021 | Statista](#)

⁵ [The National Food Strategy - The Plan](#)

3. The Food System

3.1 Summary

The expansion of the human population within stable global temperatures over the last 10-12,000 years has largely been to the success of agriculture. The global food system now creates and moves more calories than necessary for human consumption, albeit disproportionately distributed. However, with this population growth, success has come at a cost. 50% of the total habitable land on earth is now used for agriculture, 77% of the world's farmland is used to graze animals or produce crops to feed animals. These animals we use for meat products only provide 18% of the global calorie supply and only 37% of protein.⁶

The picture for Carmarthenshire is very similar, as noted previously in The Local Food Production Landscape. Carmarthenshire covers just over 206,000 hectares (ha) of agricultural land, with 4,000 farms. Of this 3,762ha are used for crops (0.018%), (1,153ha of which is for stock feeding,) that's 99.87% usage of available agricultural land for animal production. This is 86% of total land in Carmarthenshire in use for animal production.⁷

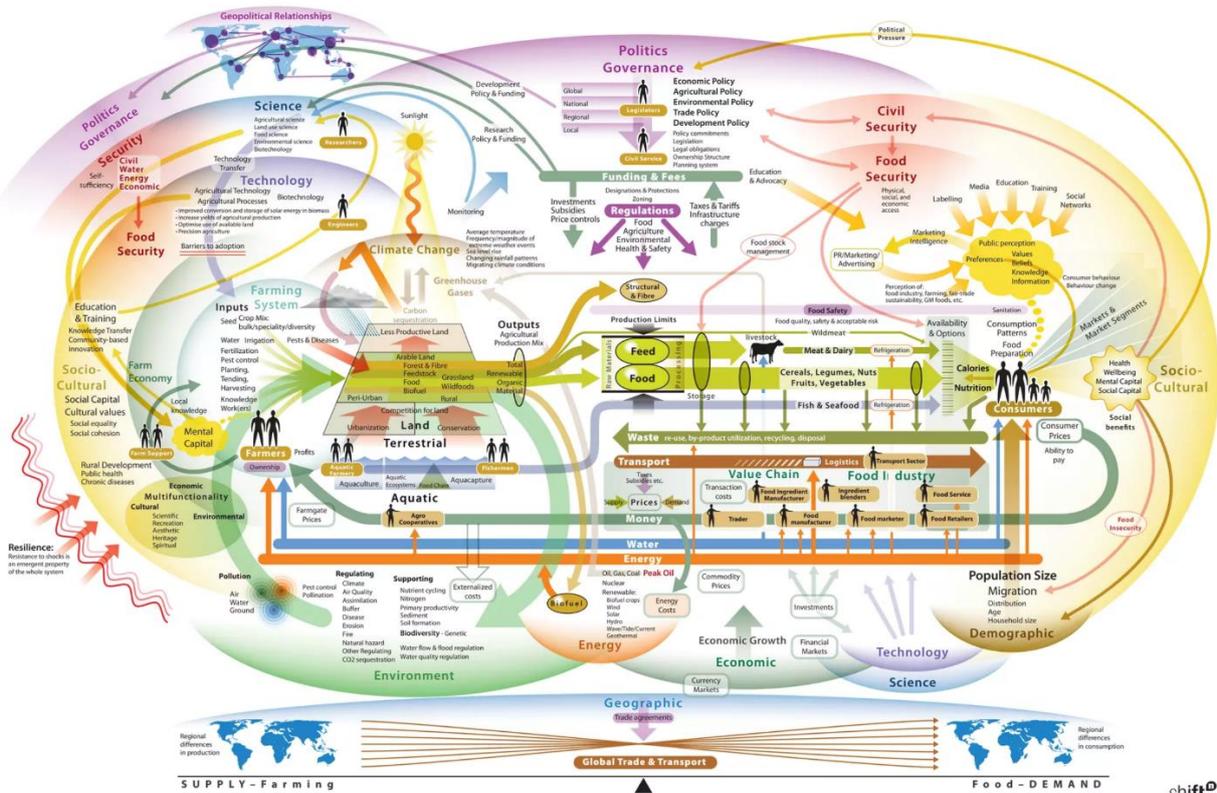
To transfer from a global to a local food system we should focus our short and medium-term efforts on organisational and structural objectives at key intervention points. The cultural, local, and individual changes required will be a gradual shift through influence and leading by example.

⁶ [Land Use - Our World in Data](#)

⁷ [Crops \(Hectares\) by Area \(gov.wales\)](#)

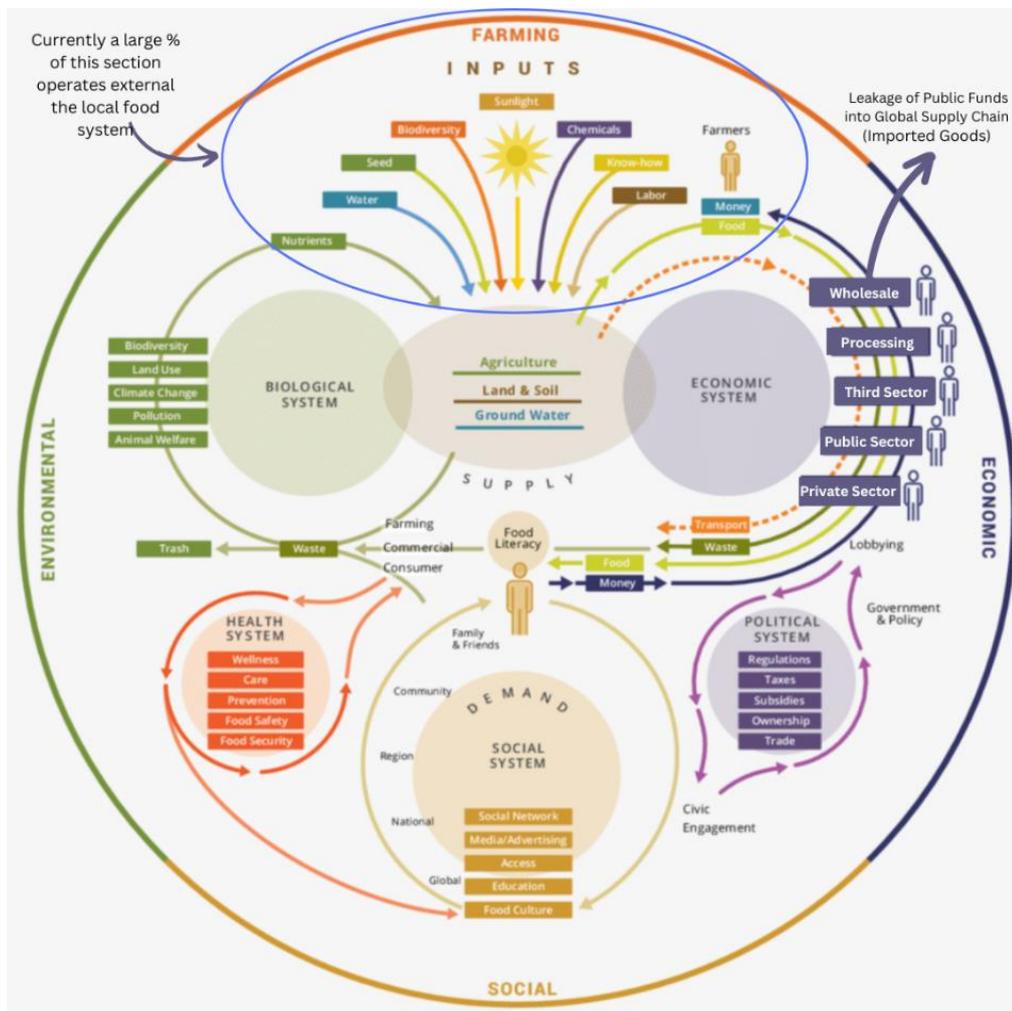
A Global Food System ⁸

Global Food System Map

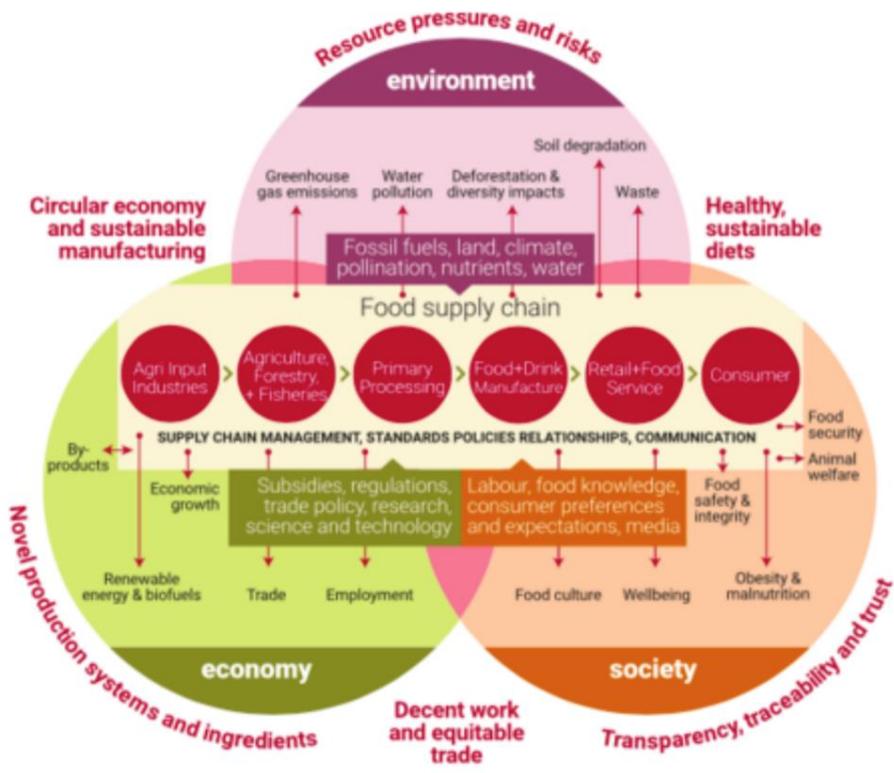


⁸ [Global Food System Map 3](#). Source: ShiftN, 2009 | [Download Scientific Diagram \(researchgate.net\)](#) – Swedish institute of Agricultural Science

Our Current Food System – H1



Even better working systems have pressure on resource and risks to environment – H2

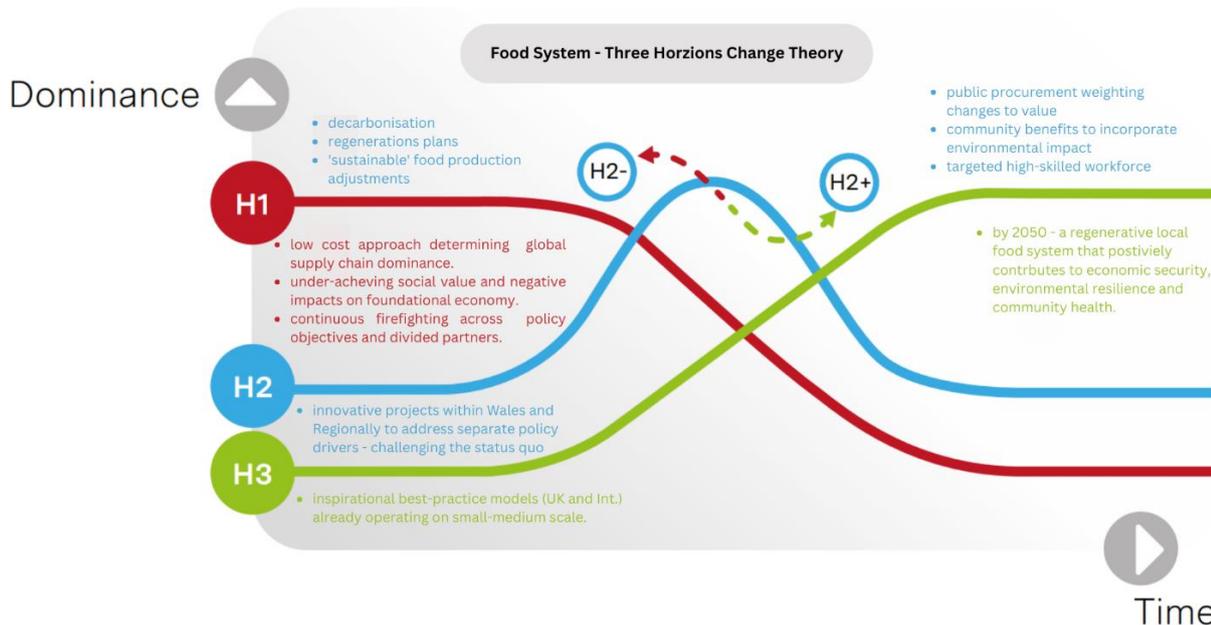


3.2 Food System SWOT Analysis

<p><u>Strengths</u></p> <p>Localised operational distribution networks.</p> <p>Local and Regional Sustainable Food Production working models.</p> <p>Existing collaborative working partnerships.</p>	<p><u>Opportunities</u></p> <p>Potential diversity of local food supply - narrowing the gap between what's being supplied and what's being produced creates resilience.</p> <p>Utilise the current funding landscape to support food system intervention projects at a sufficient scale.</p>
<p><u>Weaknesses</u></p> <p>System Traps (cost-driven approach, lack of targets, burden-shift) occur without a coordinated approach.</p> <p>Policy “rule-beating” where lack of in-depth data distorts impact figures.</p> <p>Reliance on Global Food Supply Chains.</p> <p>Lack of Processing and Manufacturing Infrastructure</p>	<p><u>Threats</u></p> <p>Increased demand within public sector provision for imported agricultural crop commodities and animal-source foods worsens climate change and economic stability of global production areas.</p> <p>Climate change drives crop failures, livestock disease in and increased volatility of global supply chains.</p> <p>Lack of investment in product innovation, scalable manufacture, and processing facilities.</p> <p>Modern Food Production has put the entire Global Food System at risk⁹</p>

⁹ [The Report - National Food Strategy](#) 2021, UK

3.3 The Three Horizons Change Theory



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Horizon 1 (H1) is the current situation, the 'Power Holder' – Stakeholders managing the current system led by cost targets and limited devolved control. Time and resource pressures are high which restrains ability to innovate and action broad change. Cracks in the system appear and are fixed, yet the way of working is unsustainable e.g. finite growth and physical resources. Over time, the development can retain and build on the most effective aspects.

- Our low-cost approach determines the dominance of a global supply chain through historically cheap imports.
- We consistently under-achieve on social value and foundational economy impact within the current food system.
- This leads to continuous 'fire-fighting' across policy objectives and divided partners with significant funding being under-utilised.

Horizon 2 (H2) is the 'Innovator' – Smaller organisations and people working within the above group that generate the big ideas. There are always tests, experiments and pilots needed to explore these new ways of working and successful application becomes the norm over time. These ideas when actioned can form into H2- or H2+.

- Innovative projects within Wales and Regionally addressing the status quo, but still separate and not yet of scale for large scale impact.

H2+ Usually solutions that disrupt significantly the normal working behaviours, innovations that can be further enhanced to transition into Horizon 3.

¹⁰ [PHW-Three-Horizons_FINAL.pdf \(futuregenerations.wales\)](#)

- Examples could be - Decarbonisation, Strategic Regeneration Plans, 'Sustainable' Food adjustments, Well-Being of Future Generations Act.

H2- These innovations are the 'sticking plasters' that wither support a failing horizon 1 or get absorbed into it. Even great initiatives can end here if not nurtured in the right way, often happens due to siloed working.

- Examples could be – Procurement Weighting Changes towards Value, targeting a Future High-Skilled Workforce with Circular Development Strategies, Community Benefits to incorporate Environmental Impact, Social Enterprise Policies.

Horizon 3 (H3) – the 'Visionary' - Pockets of this work already happening on the fringes, usually driven by empowered and passionate people. Adapting ways of working through dynamic actions, sometimes off course yet maintain focus on the 'New Normal'.

- Inspirational best-practice models (UK and International) already achieving the innovation as the new normal, setting the pace of change.

Self-Actualisation – by 2050 a fully regenerative food system that positively contributes to, ensuring a sustainable economy and fair employment, environmental resilience (responding to the climate and nature emergencies), improving community well-being and reducing health inequalities.

Through the applications of this modelling to the local food system the short-medium term actions proposed in the strategy must focus on the innovative and evidence-based best practice models. Key opportunities outlined in the Carmarthenshire Innovation Report including the further development of sustainable food procurement have been incorporated into this strategy development document, shaping actions that have regional/national application. Drawing down innovation and involvement from all sectors as per the theory of change, to affect whole systems development it's recommended that facilitated workshops take place for each action involving key stakeholders.

3.3 The Challenge Matrix

“Every economist since Adam Smith has recognised that the incentives of the free market do not work properly if negative externalities are not priced into the system”

The National Food Strategy, 2021

This negative externality falls on the third party while the other two parties make the transaction, the local (and global) food system is drowning in these costs. They often fall on us, the public, for example within Community Food Initiatives to support people in food poverty the Welsh Government alone currently has £16m invested¹¹. Other funding to address these negative externalities includes costs of preventable diabetes treatments, de-carbonisation budgets to address emissions in the food production sector and biodiversity loss reversal.

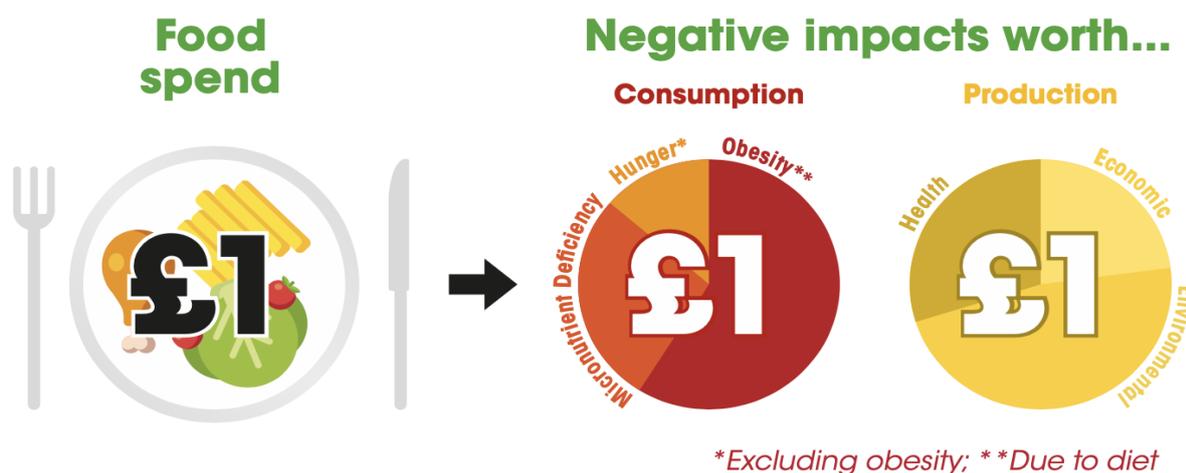
From a local context Public Sector Anchors' Food related spend annually is around £5.8m yet HDUHB spend on preventable type 2 diabetes is estimated around £16m. Obviously there are a

¹¹ <https://businesswales.gov.wales/foodanddrink/community-food-strategy>

multitude of factors at play, yet it's quite clear not enough value is placed on our food provision as an actor on wider policy objectives.

For every £1 we spend on food there is an un-costed £1 of harm being done to the system, passed on to the public through taxation. ¹²

Cost of the food we buy for our health, the society and the environment ²



The biggest challenge that actions from a Local Food Strategy have, is to traverse the matrix of Economic Growth VS Environmental Sustainability and bringing drivers together on the issues of Local Food VS Sustainable Food VS Community Nutrition.

For example - Integrating 'sustainable nutrition' into professional and community practice (later touched on in the Short-Term Action Plan) is a multi-faceted and recent concept, the challenges specifically are around societal and institutional support, information resource and staffing pressures on the dietetics sector. This is compounded by accessibility issues to local, sustainable food including the lack of variety and costs of products in the market.

By bringing together the actors, experts and stakeholders in these areas we can de-polarise the often contentious and harmful debate around 'A Sustainable Food Future' for collective action on a complex system.

Economic

Growth vs Sustainability

The rural economy is in increasingly significant danger of falling further and further behind the country's more urban areas, with a retiring population and a declining number of people and opportunities available to replace them. This is evidenced later in this report by the current skills shortages across the food system.

¹² [True Cost Accounting - Sustainable Food Trust](#)

In the context of the local food system constituent parts, developing a strategy is designed to address the region's significant challenges and to remove barriers to growth – 'To reflect the needs of rural areas and the rural economy'¹³.

The agriculture, forestry and fishing production sector currently (June 2022) has the second lowest, £652m Gross Value Added (GVA) of all sectors in Wales¹⁴, where as human health and social work activities the second highest, £8,611m. GVA is measured as an output pre head or per hours worked, it naturally declines as jobs in the industry decline, to maintain efficiencies the pressures on farmers are to produce more and more with less and less available land. This could be seen as no bad thing with new technology like robotics that can replace human labour, yet lack of sustainable rural investment due to uncertainty of policy means that pressures still increase. As labour and opportunities dwindle, we see increasing negative impacts on the health and well-being objectives in Carmarthenshire. Evidenced as South West Wales has the lowest Gross Disposable Household Income rates in Wales¹⁵

Green Growth Strategies have yet to be fully embraced by the Food Production Sector here in Carmarthenshire shown in part by the 'flatlining' of carbon reduction in certain areas including primary production. This growth has been prohibited by lack of new markets, confidence, innovation and imbalances in natural systems¹⁶, the latter of which compensated by increased reliance on agricultural chemicals, pesticides and fertilisers. Ensuring a smooth labour market transition is a key opportunity we are not meeting to enable Green Growth, this should be addressed with strategic objective within this report.

A return to the thriving rural market towns as being taken forward by the Strategic Regeneration Plan for Carmarthenshire 2015-2030 and the Ten Towns Initiative¹⁷ are transition drivers towards supporting and re-invigorating the traditional economy, here Sustainable Food Production can create smaller pockets of circular economy and community wealth building. Below is the example of how the market influence of a growth based economic model impacts on just one food source – fish products.

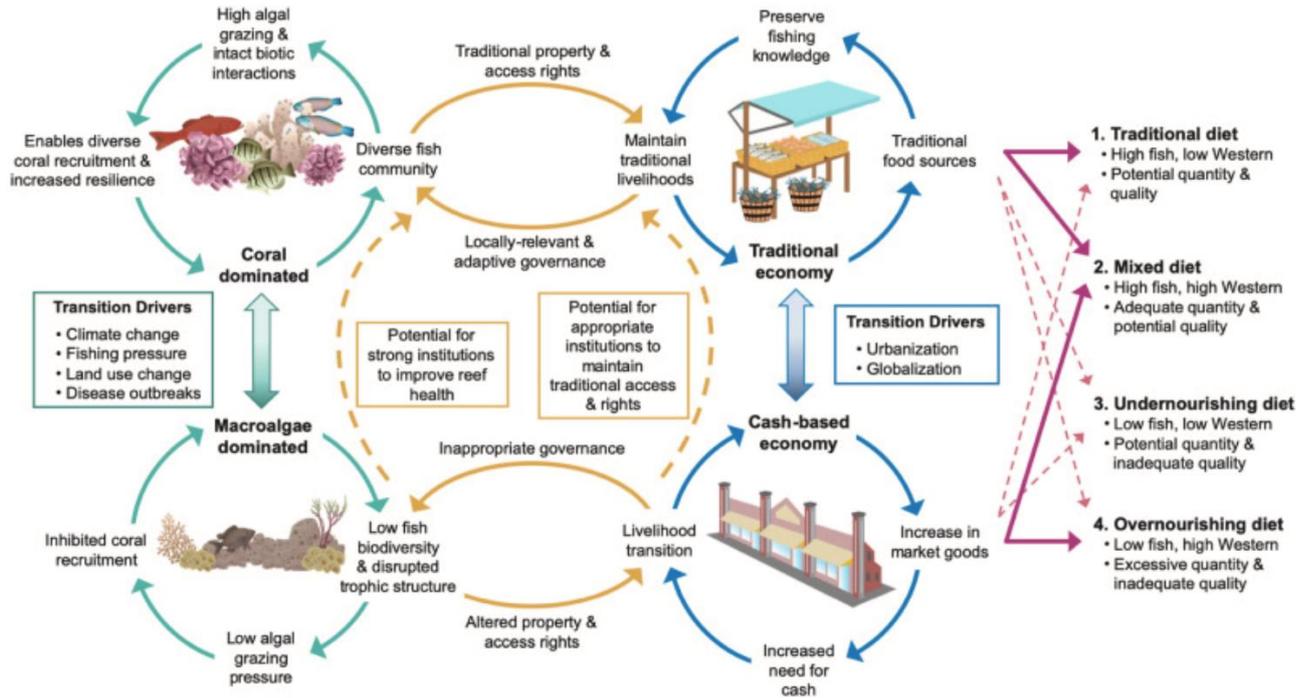
¹³ [Carmarthenshire County Council / Cyngor Sir Gâr - Preferred Strategy \(oc2.uk\)](#)

¹⁴ [Gross Value Added in Wales by industry \(gov.wales\)](#)

¹⁵ [Welsh economy in numbers: interactive dashboard | GOV.WALES](#)

¹⁶ [Towards Green Growth | READ online \(oecd-ilibrary.org\)](#)

¹⁷ [Ten towns \(gov.wales\)](#)



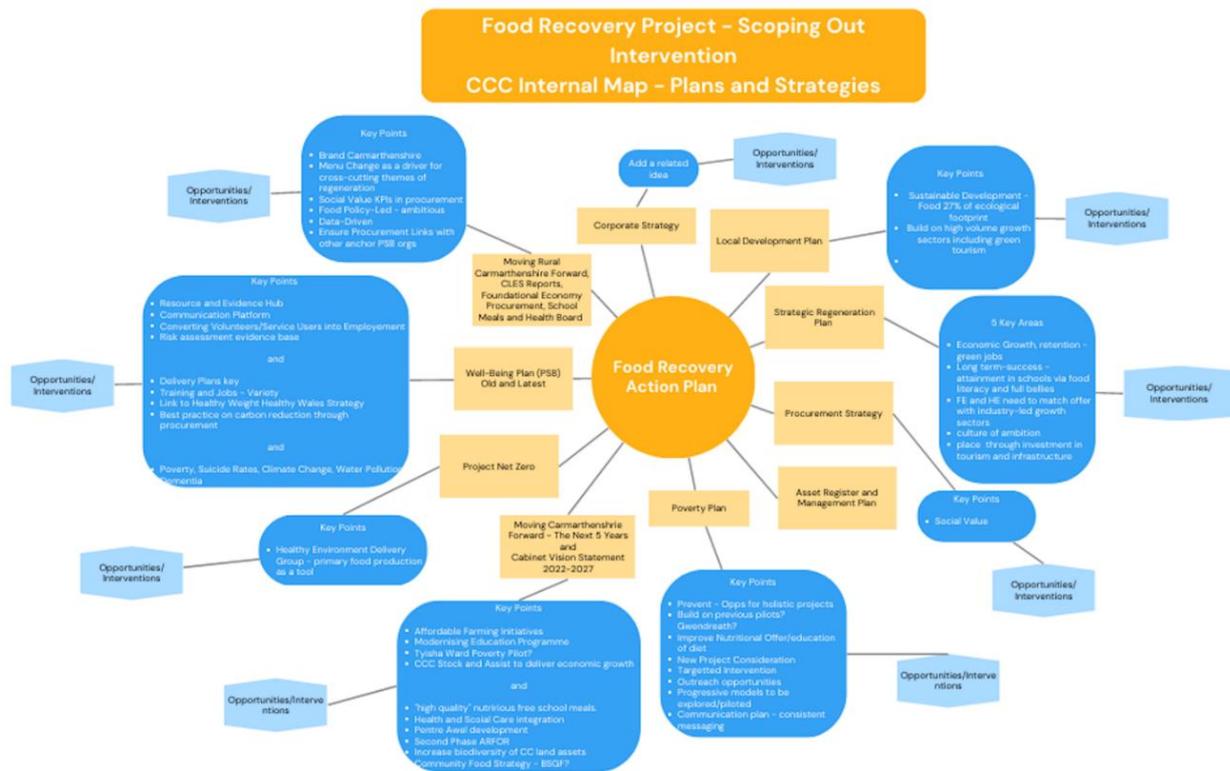
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4. PSB Impact

As part of the Cooperation and Supply Chain Development Scheme, CCC has begun mapping how the PSB partners interact with the local food system, with both direct and in-direct touch points highlighted. The outer circle is where actions recommended in this strategy development document need to inter-link to ensure a whole systems approach. During the next steps of developing this strategy, we will add detail to understand the collective opportunities for action and delivery.



This has been further broken down into the respective strategies and policies that impact on the intervention points, below is a working example of the Carmarthenshire County Council map.



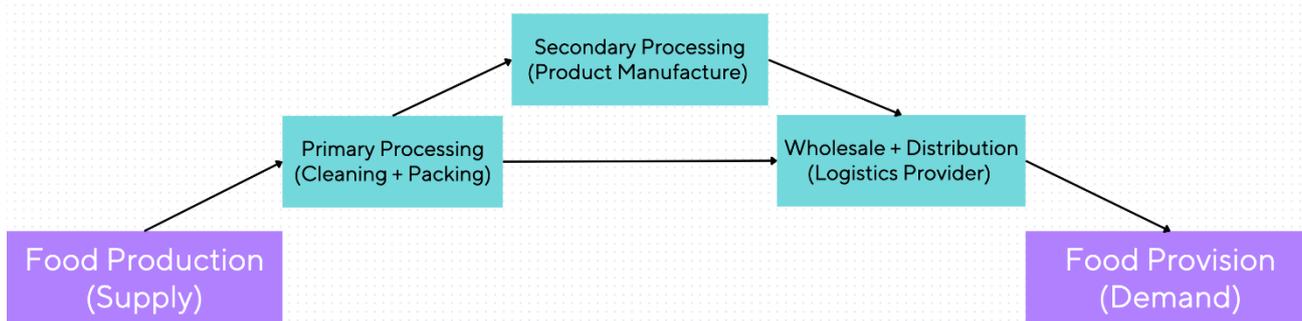
The Carmarthenshire Well-Being Plan 2023-28 acts as the web that binds action in this area together, specific action plans will offer opportunities to unite partners and external actors with the singular goal to capturing the real value of the food system for the locality, region, and nation of Wales.

4.1 Operational Touch Points

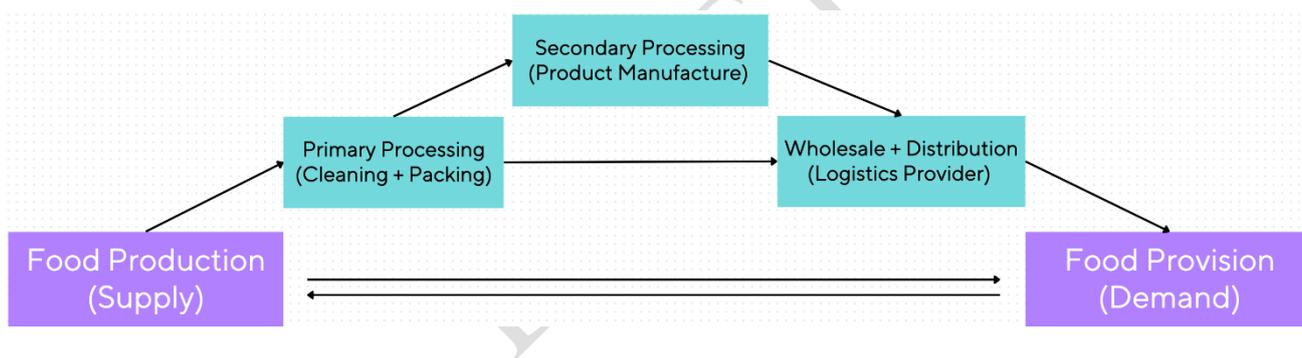
“The UK has the lowest level of food and vegetable production per head in Europe”¹⁸

The most visible food system touch point that we collectively share is quite simply the food we buy, serve and eat – Food Provision. As the most outward facing opportunity this attracts the most attention, both bad and good. In our fortune we are not the first to ‘break ground’ in this area, some examples of best practice of food system development can be found both in the UK and Europe. The recent Foundational Economy Challenge Fund Projects have shone a light on the food provision within the public sector, how it operates and recommended actions that are now being taken forward.

¹⁸ Localising food sourcing in Wales 2022, North Star Transition



In its simplest form the linear local demand vs supply food chain diagram breaks down into intervention areas. Currently the Food Provision is built on what's made available by the Logistics Provider, some feedback through specifications within procurement for example tailor what's available. In both the private sector and public sector predominantly, choices are made within budget constraints and over time this pressure works its way back to the Food Production, limiting supply variety. However this also highlights the areas in which we can add value to the local food production sector through processing and distribution, by creating a working relationship between demand and supply.



Demand – Specific to the businesses and organisations that purchase food to serve customers. This needs to be responsive to the existing sustainable food supply chain and informative to future trends and needs of each respective sector. For example, transitional menu development that considers the supply capacity of sustainable food production, with the security of stable markets there can be contractual support by different actors in the processing and distribution channels. This can be replicated to incorporate a product supply chain to the detailed specification of products required by the public sector (targeted towards those that are not sustainable or contribute to foundational economy) and can support new and innovative business models in product development which could access broader geographical and type of markets – a high-growth green sector.¹⁹

Supply – The current supply chain is far away from being able to deliver the needs of the market overnight, however improving access to existing markets and expanding into new depends usually on capacity issues. Intervention in this area has again previously been piecemeal or only targeted at one part of the picture, due to its ‘chicken and egg’ situation e.g. there’s no point in increasing

¹⁹ [Stronger, fairer, greener Wales: a plan for employability and skills | GOV.WALES](#)

supply if there's not a market for it and we can't access the market support because we haven't got enough supply.

Processing and Distribution – Even with the Demand and Supply parts working together it would still be necessary to intervene by investing in primary processing (vegetable washing and packaging) and capitalise on the regional secondary infrastructure like Food Centre Wales, Horeb. This would allow the aggregation of existing supply, innovative product development and a long-term pathway for micro businesses to scale-up²⁰.

Action - There is however no getting around the sticking point that we need to initially increase our budgets within food provision to reflect the true cost of sustainable food production to see any returns in social value²¹ and public goods. Setting up specific supply chains for each of the PSB partner organisations would be cost prohibitive²², yet collaboratively could develop economies of scale and value for money. This 'switch' back to local supply within some catering departments has already been costed and currently underway by WG to better understand where support needs to be targeted (cost-benefit analysis). By focussing attention, efforts and external funding towards starting this transition we need to create a clear evidence base in the short-term to allow for the longer-term vision to be realised, this would need to be led by the public sector.

4.2 Skills, Infrastructure and Innovation

Summary

As with the local food system this triumvirate of opportunity needs to work collectively, not however always through simultaneous action, a phased approach where the different mechanisms of intervention hold priority at different times. These three foundations of continuous change should hold stature in every action plan to understand the impact of long-term delivery, as is exemplified in the demand vs supply engagement.

Skills

The local Sustainable Food Production sector, which spans from primary agriculture to manufacturing, understands change is imminent. However, there is an inability to plan for training requirements due to uncertainty in direction from WG on what sustainable practice looks like.

The Regional Learning and Skills Partnership Plan 2022-25 highlights challenges and opportunities facing the relative local food system needs.

- 6% decrease in Agricultural, Forestry and Fishing (28% within Horticulture)
- 21% decrease in Wholesale and Retail trade (largest area of Public Sector Food Spend)
- 17% decrease in Accommodation and Food Service Activity

²⁰ [What can Welsh Government do to increase the number of grounded SME firms in food processing and distribution?](#)

²¹ <https://hduhb.nhs.wales/about-us/governance-arrangements/board-committees/strategic-development-and-operational-delivery-committee-sdodc/sdodc-28-april-2022/item-61-three-year-plan/>

²² Local Food Sourcing in Wales 2022, North Star Transition

Public Sector

- Renewable skills will be the most required in the coming years
- Urgent need for Catering staff.

To support the action to reverse decline, pathways into food sector employment can be addressed by facilitating training of current and future skills through key projects.

Infrastructure

Hub and Spoke integration of hard and soft infrastructure into the local food system

Integrate the existing current 'soft' infrastructure;

- Food Centre Horeb acting as an incubator and skills/training provider
- Menter a Busnes – supporting sustainable business development and diversification through Farming Connect and Tyfu Cymru

Soft needs include pathways from education into the public sector, specialist horticulture apprenticeships and digital skills.

"Hard" Infrastructure requires capital investment. To maximise the return on this it needs to be targeted to support the aggregate capacity and sustainable food production sector needs.

- Utilise the existing distribution model in the county, support further development needs.
- Cooperative Processing Facilities in central locations
- Small abattoirs, Vegetable washing facilities, accredited food product manufacturers

These opportunities should be explored in conjunction with current operational practice (demand-led) and as part of a transitional 5-10 year plan.

'The value-added question here is why should Welsh frozen chips come from Belgium and, if we make them in Wales, how do we also sell them in England? More generally, there may also be significant value added in fresh fruit and vegetables with more limited amounts of processing, mainly sorting and packaging' Foundational Economy Research 2021



Innovation

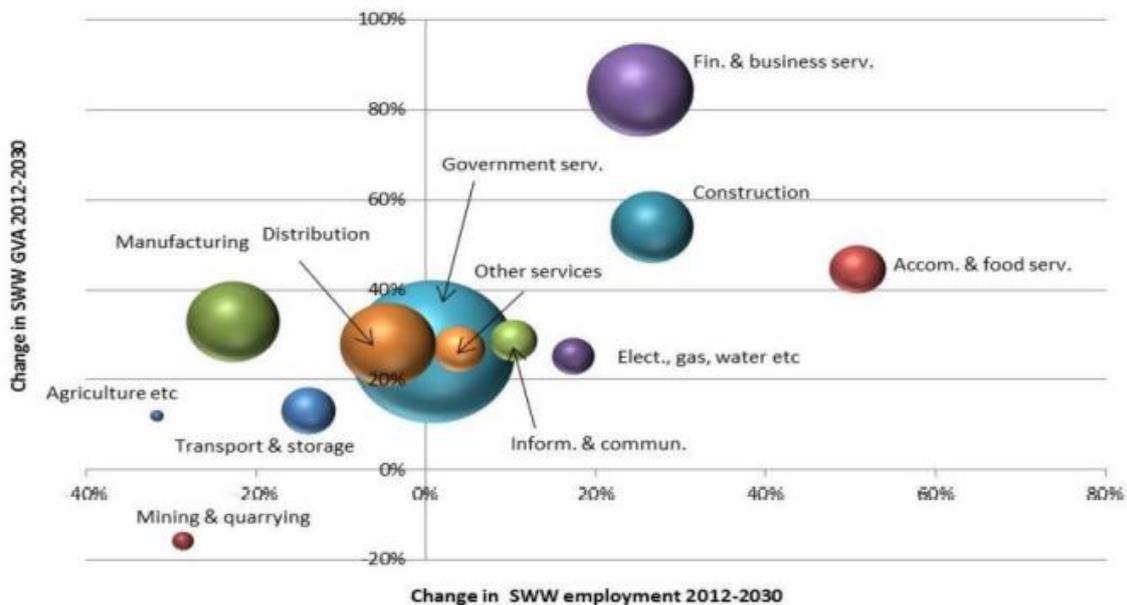
To enable a dynamic and innovative food system capable of contributing to the well-being of Carmarthenshire and contribute to a 'regional innovation ecosystem'²⁴, we need to combine our foundational and high-growth sectors Agriculture, Business Services and Wholesale, Retail, Hospitality and Food (the three largest types of industry in Carmarthenshire).

Demographically, Agriculture in Carmarthenshire almost doubles the Welsh average in sector employment. But as we've previously noted, this is under threat.

We can see from the diagram below the disconnect between GVA and employment increase in the Accommodation and Food Service Industry vs the decrease in Agricultural Value. The link (or lack of) between food served and food produced contributes to this, as seen by Carmarthen Food (a local distribution social enterprise supporting local food producers sell directly to customers) stifled by lack of innovation and market diversity leading to closure. This can be addressed by investment in an innovative model of multi-sector primary production supply aggregation, complimented by up-coming research and development innovation funds.

²³ [Manufacturing future for Wales: framework \[HTML\] | GOV.WALES](#)

²⁴ Exploring the Innovation Prospects for Carmarthenshire 2022, Kevin Morgan, Dylan Henderson, Rack Delbridge.



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5. External Influencers and Actors

Organisations and Projects

In addition to the PSB Partners we are also mapping the local organisations and projects that share the same levels of county-wide intervention on the food system or wider determinants, that are shared by the Well-Being Objectives in relation to food. A lot of this 'grassroots' activity has already been mapped by Carmarthenshire Food Network and made publicly available by CCC as part of their GIS Tool, the BSGF Partnership looks to bring in expertise from other projects/partnerships in Wales and UK as part of the Sustainable Food Places Network. BSGF in relative infancy compared to Cardiff, Vale of Glamorgan and Monmouthshire, is hitting the ground running with a more food system development and project-led focus, building on the great work of the PSB and Partners.

Collaboration and Cooperative Working is still stifled by the perception of competition, particularly evident in the Third Sector reliant on grant funding. This barrier is slowly being broken down but it needs to happen at a faster pace when dealing with specific issues like food poverty and community health.

Due to the nature of the complex food system here in Wales and lack of centralised mapping, the true number of actors and influence is still an unknown. This is also the case for Welsh Government to share or publish all reports funded by the Foundational Economy Challenge Fund, this would allow more progressive strategic partnerships across regions and nationally, avoiding unnecessary duplications. Fortunately for Carmarthenshire some of the most progressive work is happening right here on our doorstep and across the region.

²⁵ [https://www.swansea.gov.uk/media/2815/Swansea-Bay-City-Region-Economic-Regeneration-Strategy/pdf/Swansea Bay City Region Economic Regeneration Strategy.pdf?m=1630588](https://www.swansea.gov.uk/media/2815/Swansea-Bay-City-Region-Economic-Regeneration-Strategy/pdf/Swansea%20Bay%20City%20Region%20Economic%20Regeneration%20Strategy.pdf?m=1630588)

As now all 22 Local Authority areas either have or are developing sustainable food partnerships, the importance of which now recognised by WG in their recent £3m funding support. This is an opportune moment to capitalise on strategic partnerships, sharing learning, best practice, and data evidence of local food action.

6. Vision and Mission

Vision

“A Carmarthenshire Food System that produces, promotes and provides healthy and sustainable food fit for Future Generations”

Primary Objective (Mission)

“Through a place, partnership and project-based approach we will lead by example to build a local and regional food system that is healthier, sustainable and fair for all. By strengthening food sovereignty, restoring and maintaining biodiversity, mitigating and adapting to climate change and improving Carmarthenshire’s environmental, social, economic and cultural well-being.”

Ambitions

In the void of a Wales-Wide Food System Strategy, a local food strategy incorporates community, public and private sector. These shared ambitions stem from the Well-Being Plan Objectives.

For example, shared county/regional ambitions are:

- Everyone has access to the healthy, nutritious food they need.
- Producers ensure that what they produce is increasingly healthy and environmentally sound.
- Food companies and rural farming communities are a thriving feature of the economy and places where people work.
- Diet-related disease and negative environmental impact are in decline.
- Those who provide food are committed and able to serve and sell sustainable food.

This is shared with “*The strategic vision of the Welsh Government is to build a strong and vibrant Welsh food and drink industry with sustainable supply chains that have a global reputation for excellence and having one of the most environmentally and socially responsible supply chains in the World*”²⁶ -we, as a county and partnership can be more dynamic and act now.

²⁶ [Supporting a sustainable food and drink industry in Wales - Food Skills Cymru](#)

7. Strategy

The recommendations in this strategy development document are designed to intervene on the local food system simultaneously at multiple levels. The review of policies and plans of the PSB stakeholders alongside best practice in this area is being modelled against the potential impact and implementation over the next 3-5 years as part of a longer-term transition of 10-15 years.

7.1 Strategic Objectives

Strategic Objective	Impact	Delivery
Home and Community	<ul style="list-style-type: none"> • Support individual, family and community health and well-being through developing interest in food and skills for food preparation. Promoting this with collaborative action at target areas of deprivation, poor community health and poverty. Priorities are people in pregnancy, childhood and older age • Work with existing community food initiatives like Carmarthenshire Food Network to help reduce food insecurity by building community resilience and preventing crises. If emergency help is needed ensure that the wider support services are available in a dignified and wrap around response 	<ol style="list-style-type: none"> 1. Promote county-wide “One Health, One Food System” activity in this area including the development of food knowledge, skills and literacy for targeted groups. Scale-up successful delivery models already operating. Support and deliver food educational programmes and initiatives in schools by adopting a whole school approach in collaboration with stakeholders operating in the food system. 2. Increased awareness and understanding of food insecurity and poverty in Carmarthenshire, including capturing data to better understand the determining factors and targeted approach to overcoming the barriers. Explore a model of delivery that supports a “working your way out of food poverty” with subsidised local meal/produce delivery that could also economically support a cooperative model of local producers.

Strategic Objective	Impact	Delivery
Public Sector Provision	<ul style="list-style-type: none"> • To prepare, serve and promote enjoyable, healthy and sustainable food within all public sector catering and food provision services. • Ensure that Food Goals remain achievable through continuous application of data-based research and evaluation. Engage with all partners and stakeholders to create a pathway to public procurement, supporting the transitional stages to increase local supply with menu specification. 	<p>3. Setup collaborative working groups (catering, procurement) across partners to implement and plan the integration of a sustainable catering toolkit, future generations menu and social value/community benefit. Aligning menus across the sector over a transition period that can be taken forward as part of supplier and primary producer engagement. Follow a project and place-based approach to innovative supply and provision methods, looking at opportunities to connect supply chains, at very least to support primary food micro businesses to becoming SMEs. This is no easy task and should be looked to be professionally facilitated to maximise efficiency.</p> <p>4. Research and develop a project management plan in line with each of the Food Goals (as outlined in section 7.3 below) and ensure that the investment is secured, and resource supported with the necessary skills and training developments. Including the capture of data to contribute to the data suite, establishing baselines and KPIs that can allow for the impact assessment of action. Specifically targeting the Fresh Food Sector to support Agroecological and Horticultural supply as these have the highest percentage of leakage at an average 95%.</p>
Food Economy	<ul style="list-style-type: none"> • Develop a thriving, innovative and sustainable local food economy that holds social value by being fair, inclusive, and widely affordable. 	<p>5. Utilise assets and the current funding landscape to bridge the gaps between agriculture – food service – manufacturing. Further encourage the connections between local enterprise and communities with programmes of engagement and targeted funds to support the transition of existing supply base towards sustainable food practices. Affordability can only be addressed by scaling-up certain supply</p>

Strategic Objective	Impact	Delivery
	<ul style="list-style-type: none"> Lead by example to measure and maximise the impact of public sector revenue by addressing the secondary leakage outside of the region, stimulating supply through demand of local, sustainable food produce. 	<p>sectors to increase the impact on foundational circular economy, placing measurable social value on sustainable food production (public goods). Further explore targeted opportunities to promote the Farming Connect 'Mentro / Venture' Programme within managed land assets for food and farming SME incubation.²⁷</p> <p>6. Stimulate demand that is targeted by sustainable catering toolkit development²⁸ that can be applied across all public sector menus, food outlets and promoted to private sector feeding the tourism economy²⁹. Lead by supporting and developing a project-based approach that can directly tackle the key supply issues facing rapid expansion of productive horticulture in correlation with demand from the public plate. Invest in micro primary processing units for existing producers and a medium scale aggregation facility to wash and pack vegetables, readying the sector to expand for market diversity (Public, Private and Third). Increasing the marketing capacity both internally to promote good practice and externally to tap into the expanding tourism experience sector with the Carmarthenshire Brand.</p>
Food Growing	<ul style="list-style-type: none"> Increase the amount of sustainable and regenerative food growing opportunities and production. 	<p>7. Deliver targeted community food growing opportunities based on demand, ensuring synergy with the GBI Strategy, Ten Towns Consultation, Community-Asset Mapping and areas most in need (third sector organisational mapping x food poverty x assets). By creating a framework for sustainable food growing and land-management married with data made available with the GIS Tool we can contribute to 'alternative' community food</p>

²⁷ [cff_venturebooklet.pdf \(gov.wales\)](#)

²⁸ [How Leeds uses sustainable food to help schools combat the climate crisis | Local action \(friendsoftheearth.uk\)](#)

²⁹ [Transformations: Strategic Regeneration Plan for Carmarthenshire – 2015-2030 \(gov.wales\)](#)

Strategic Objective	Impact	Delivery
	<ul style="list-style-type: none"> Facilitate the ecosystem of local food growing by engaging partners to promote and sustain initiatives, adding value through a portfolio of public, private and third sector opportunities 	<p>growing and neighbourhood planning. PSB Partners acting as land-managers have a responsibility to ensure these contribute to the Well-Being of Future Generations. By implementing an environmental and sustainability impact assessment on land holdings (including business tenants) it could be made clearer where interventions could have most impact. Other actions outlined in this strategy development document around strategic partnerships could further support the long-term sustainability of assets to add economic value³⁰.</p> <p>8. Seek to establish cooperative models of local food growing, target areas/sectors should include (in addition to above) private sector land tenants/owners that farm or manage land that could support sustainable mixed farming. Integrating a somewhat divided primary food production system across sub-sectors to support each other through knowledge transfer, shared investment costs and access to markets. Facilitation should be provided to link in wider organisations that can provide more holistic business support, alternative commercial viability and skills/training/apprenticeship opportunities. Through investing and supporting initial and innovative projects in this area we can promote the cooperative model³¹ of food growing into a mixed distribution and supply chain, adding value by reversing negative environmental impacts and increasing resilience of the local food system.</p>

³⁰ [moving-rural-carms-forward-report-final.pdf \(gov.wales\)](#)

³¹ [WWF-Executive-Summary-ENG.pdf \(escapevault.co.uk\)](#)

Strategic Objective	Impact	Delivery
Environment	<ul style="list-style-type: none"> • Measure and reduce food waste, including packaging in the public sector and support the community and private sector to do so as well. Explore innovative opportunities for composting, redistribution and carbon-neutral/negative packaging/processing. • Assess the impact of each partner's food system intervention points and set SMART targets for actions in relation to local and regional climate-change risk assessments. 	<p>9. Set up monitoring methods to capture quantitative baseline data on food waste (avoidable and non-avoidable) across all PSB partners' food provision outlets, this will allow the precise impact measuring of the transitional changes (menus and products) to sustainable food. Conduct impact assessments of % of whole provision changes in policy regarding the specification on packaging i.e. non-recyclable packaging, content of recycled material, carbon-neutral, home compostable and single use plastics. Look to establish innovative commercial organic composting facilities that can close the loop between food waste (commercial and household) and agricultural soil fertility. Promotional campaigns to reduce avoidable food waste by raising public awareness of the environmental impact.</p> <p>10. Initially create linear impact lines within SMART targets on food system intervention points, working towards developing a working 3D model of the local food system as whole, data can be entered (if not live direct feed) that reflects partner project activity and outputs under each key intervention point (in line with Environmental Impact Reports³²). Use this evidence to promote wider cultural change in the private and third sectors.</p>
Governance	<ul style="list-style-type: none"> • Encourage collaboration and partnership internally through "task and finish" working groups within the relevant departments of PSB organisations. Strategically engage with the Bwyd Sir Gâr Sustainable Food Partnership to support 	<p>11. Ensure that strategic and action plan reporting is delivered to the correct levels of governance within organisations and to strategically engage with the Bwyd Sir Gâr Sustainable Food Partnership that can provide holistic oversight of local food system, resourced with partner membership that has decision making capability and necessary</p>

³² [Natural Resources Wales / South West Wales Area Statement](#)

Strategic Objective	Impact	Delivery
	<p>working towards Gold Standard Accreditation.</p> <ul style="list-style-type: none"> • Ensure that sustainable food is embedded coherently across local policy, guaranteeing that food has a high profile across all PSB partners. 	<p>representation/expertise. Working towards Gold Standard Accreditation as a Sustainable Food County and longer-term as a region. Continue to support key voluntary and third sector organisations with third-party funding opportunities and facilitate the expansion collaborative networks like the Carmarthenshire 'Food' Network.</p> <p>12. Ensure that the objectives of the strategy are considered in all food related strategies, plans and policies, groups and forums identified in this report and subsequent action plans. Reinforce collaboration across the Regional Partnerships Board.</p>

7.3 Suggested Food Goals

Each of the long term goals below represents an integrative piece of work and relies on collaboration between PSB Partners and departments to achieve a coordinated approach. This coordinated approach will be overseen and mediated by the PSB through cross-departmental food working groups, whereas each PSB partner will have a duty to collaborate, working to reach targets. These suggested goals have been established by: consultation with Food Policy Alliance Cymru (a coalition of organisations and stakeholders with expertise from across the food system in Wales), consultation response to the Welsh Government Draft Food Bill (Wales) 2023, the Social Value and Procurement Bill, the Agriculture Bill and the developing Welsh Community Food Strategy.

Drawing in evidence from best-practice models across the UK and Europe, by setting ambitious long-term goals and targets we can develop action plans that are conducive to the local food system. The Goals would help stimulate immediate action and help measure progress, further consideration to aligning targets to duties already laid out in Legislation, such as those contained in the Environment Acts (Wales), would be pragmatic.

- Lead by Example, set clear and measurable targets, be bold and ambitious yet evidence-led.
- Community Health Improvement through diet choices, skills and accessibility
- Food Security - increase our resilience to global threats
- Restore nature and improve the impact of our local food system on climate change for future generations.
- Meet the standards expected of us by the public on health, environment and animal welfare.

1. Food for All

Carmarthenshire becomes the first county in Wales to eliminate the need for food banks. By creating access to the food they need in a dignified way and empowered with the skills to prepare food in order to lead a healthy life.

Potential Target - Zero food banks in Carmarthenshire by 2030

2. Food for Public Health

Increased consumption of vegetables, which are produced sustainably in Wales for Wales.
Educational provision on food related issues in each key stage in all schools

Potential Targets -

A. 75% of Gov Eatwell Guides recommended vegetable consumption produced locally/regionally and sustainably by 2030.

B. 100% of schools include food in Key Stage 1–3 Curriculum.

3. Net Zero Food System

Potential Target - A net zero food system for Carmarthenshire by 2035

4. Farming for Nature and Climate

Increased amount of agroecological production. Measure the environmental footprint of food and set a target to reduce within food production and consumption.

Potential Targets -

A. 100% local agroecological production by 2035.

B. 75% reduction in environmental footprint of food production and consumption at home and overseas by 2035.

5. Sustainable Food Procurement

Increased public procurement of food from organic³³ or agroecological Welsh producers. Strategies for ensuring adequate supply and fit-for-purpose dynamic procurement tools should be addressed in the roadmap. Setting measures based on the Global Farm Metric and WG Sustainable Farming Assessments.

Potential Target - 30% of public procurement of food has provenance from organic or agroecological regional producers by 2030.

6. Sustainable Food Sector Jobs and Livelihoods

³³ <https://ofgorganic.org/news/organic-the-benchmark-for-truly-regenerative-farming>

Those who earn their living within the food system receive, or are enabled to receive, at least the living wage or a fair return for their work. Work, whether on land or sea, is free from exploitative practices, and is varied, engaging and empowering. This cannot be achieved by focussing solely on individual businesses or by simply mandating higher wages, but requires analysis of the market structure in the food system that leads to low wages in farming and the local food sector.

Potential Targets –

- A. 100% of Carmarthenshire and regional food sector jobs paid the real living wage by 2030
- B. Double the levels of direct employment in the Agriculture Sector to 6% by 2035

7.4 Achieving Food Goals

1. Food for All

Insufficient and insecure incomes drive household food insecurity which results in people having to compromise on food and other essentials. A rising cost of living crisis has already seen an increase in demand for food bank services (14% in UK, 38% in Wales for emergency food parcels and 40% increase in new service users), cuts to anchor institution budgets are likely to further increase financial hardship either through increases in council tax and/or reduction in frontline services. The Carmarthenshire PSB Partners have limited power to directly challenge this.

For many frontline organisations, providing a referral to a food bank is often the simplest and quickest route to supporting someone who is experiencing financial hardship. While the compassion of volunteers across Carmarthenshire is commendable, food parcels are rarely able to meet medium-term dietary, social and cultural needs and preferences. Food banks are not an appropriate or long-term response to poverty, and where they are the first or only port of call, opportunities to strengthen income and prevent future hardship are often missed.

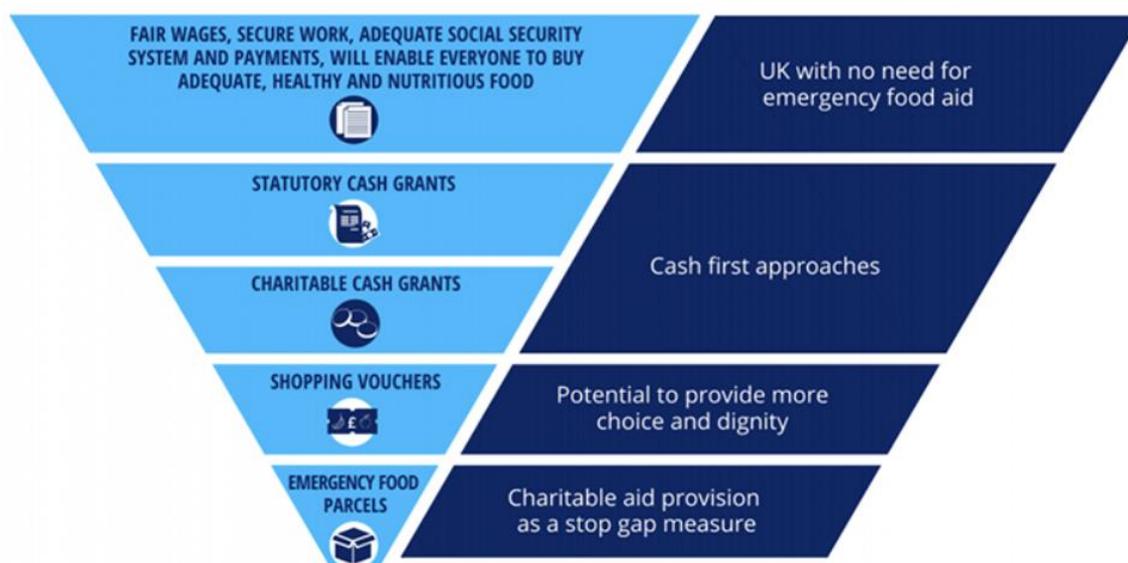
The breadth of local third sector organisations are dealing best they can with this diverse issue, however they can be further supported by overcoming certain barriers. Access to land for community food growing, freedom of data sharing across connected communities and facilitated networking/training events to create “pathways out of poverty”. Where access to food is needed there is an opportunity for local community supported agriculture to provide. Both at the emergency response level and longer term through a staged payment model supporting people’s transition back to controlling their health and wellbeing, full circle to working or volunteering their time at food production facilities. This model of fresh food supply integrated with food banks was fast-tracked through the Covid pandemic and brought to the forefront an additional challenge - the lack of food literacy and preparation skills needed to live an affordable healthy life. There are projects and organisations already delivering these skills in Carmarthenshire, including the PSB Partners Coleg Sir Gâr and Hywel Dda University Health Board operating in partnership through the Carmarthenshire Food Network.

In partnership with operational Third Sector Organisations, promotional campaigns are needed to ensure the public are accessing the financial support available, utilising the existing “Claim What’s Yours?” campaign and Tackling Poverty Action Plan. Opportunities to pilot the use of local food vouchers to replace food bank referrals and work in collaboration with food insecurity funders on

specific emergency financial assistance (47% of the general public support higher taxes to fund programmes that reduce poverty). To measure impact, we need to develop a public data hub where real-time data input and collation can support internal and external stakeholders, this will include undertaking a measurement of food insecurity through PSB partners and external stakeholders. Further work will need to take place to explore the integration of this measurement and data with income and health boosting practices.

Over the coming year, the 3 Trussell Trust Foodbanks in Carmarthenshire will be producing their own strategic plans specific to the data and community insight of their locality; it's crucial that strong connections and partnerships of the PSB partners with external organisations support this continuous development.

To sustainably overcome this challenge, application by pioneering Public Supported Agriculture Model can play a crucial role, as explained separately in this report alongside practical considerations on Public Health education in the next point.



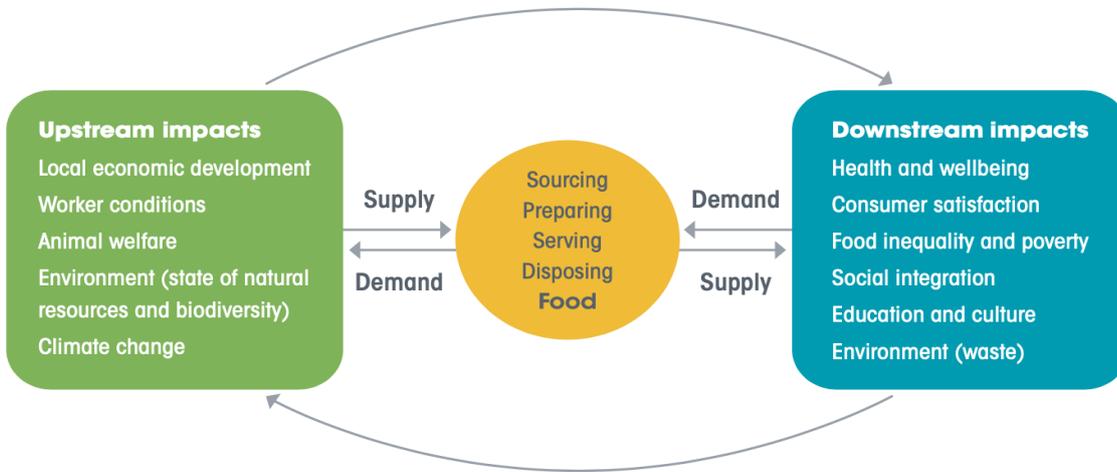
2,3 + 4. Food for Public Health, Nature and Climate and Net-Zero Food System

Targets –

- A. 100% local agroecological production by 2035 and 75% reduction in environmental footprint of food production and consumption at home and overseas by 2035.
- B. 75% of Gov Eatwell Guides recommended vegetable, protein and starchy carbohydrate consumption produced regionally and sustainably by 2030.
- C. 100% of schools include food in Key Stage 1–3 Curriculum.

Why transformation to Regenerative Farming Practices and Field to Fork matters?

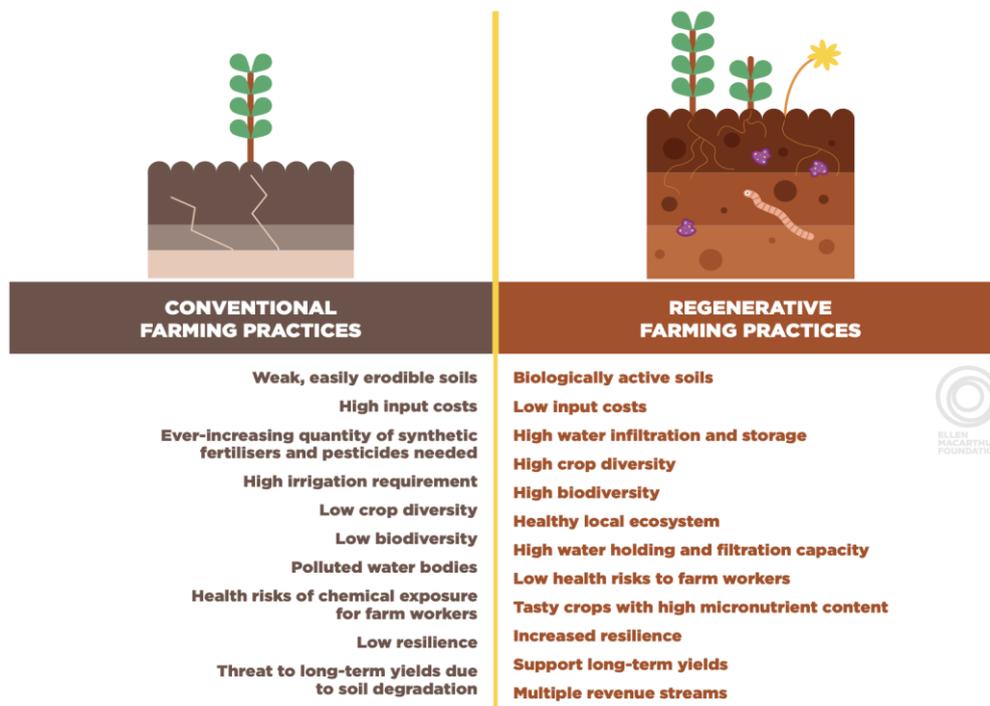
Potential impacts of food decisions on the production and consumption sides ²⁶



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DRAFT

Conventional Primary Food Production vs Regenerative



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The Statistical Context and Measures

The Eatwell Guide suggests daily 400g (5 portions of a variety of fruit/vegetables), 70-90g Protein, 400g starchy carbohydrates (aim for whole grain varieties with less processing), 3 portions of dairy or alternative (600ml milk/150g yoghurt/90g cheese).³⁶

To achieve 75% of total recommended consumption of food for the usual population of Carmarthenshire ($0.75/187,900 = 140,925$) produced locally this would equate to per day 56,370kg of fruit/veg, 12,683kg of protein, 56,370kg of starchy carbohydrates, 84,555 litres of milk.

The goals for 2030 would be annual sustainable (ideally regenerative) production of 20,440 tonnes of fruit and vegetables, 4,635 tonnes of protein, 20,440 tonnes of starchy carbohydrates, 30,842 litres of milk or dairy alternatives. - interestingly the carbon sequestration of this total amount of product (76,357 tonnes) annually through regenerative methods would be (-205,400 tonnes)

To achieve this through tree planting you'd require 6,847 hectares at the same displacement of potential food production.

To produce this amount and variety of vegetables/fruit alone would require (at a low estimate industry production rate of 2.2tonnes per acre = 44,968 acres) 18,198 hectares. And the same again for starchy carbohydrates. A total of 36,396 hectares, just 18% of the total arable land.

Carmarthenshire has 206,000 hectares of arable land, 19,000 of which new grass, 156,000 permanent grass, 10,000 grazing, 17,000 woodland.

³⁵ [Food and the circular economy \(ellenmacarthurfoundation.org\)](https://ellenmacarthurfoundation.org)

³⁶ [The Eatwell Guide - NHS \(www.nhs.uk\)](https://www.nhs.uk)

Currently Carmarthenshire only produces 300-400 tonnes of fruit/vegetables per year, predominantly for closed markets like veg box schemes.

Only 5% of Welsh Lamb (2,435 tonnes) and 5% of Welsh Beef (2,015 tonnes) is consumed in Wales, with 15% and 35% respectively of total product being exported out of the UK.³⁷ If we increased this by just 2 percentage points on each, we could provide 50% of the protein needs of the entire population of Carmarthenshire. This would have to work hand-in hand with the transition³⁸ of the sector towards more sustainable and regenerative practices, such as highlighted in the recent WWF Cymru Case Studies of 2 Carmarthenshire based farms (Meat and Dairy).³⁹

Action Plans to address the targets within this goal over the next 3 PSB terms are required.

5. Sustainable Food Procurement

Target - 30% of public procurement of food has provenance from organic or agroecological regional producers by 2030.

Increased public procurement of food from organic or agroecological Welsh producers. Action plans need to be developed for ensuring adequate supply and fit-for-purpose dynamic procurement tools and should be addressed in the project plan for this goal. Setting measures based on the Global Farm Metric and WG Sustainable Farming Assessments. As previously mentioned in the strategic objectives baseline data needs to be established and governed in line with current policy objectives, statements are made across public sector food provision often with out evidence to support claims.

*'Public food procurement is too small in value to have a significant direct economic leverage on the SME stock ... In that case, there is scope for indirect leverage, as with using public contracts to persuade food service distributors to stock more Welsh lines. Procurement can also be used strategically to encourage diversification of the products available.'*⁴⁰

As previously mentioned, transitioning to sustainable food within the public sector while keeping costs low is a complex task. Each PSB Partner will face its own constraints and challenges, however best-practice models outlined in more detail in other reports prove effective ways of overcoming this key issue. The unique opportunity here in Wales is three-fold at a national level, the upcoming Welsh Government Public Sector Food Procurement Strategy, Community Food Strategy, the Cooperation Agreement and the Social Partnerships and Public Procurement Bill. This is further supported at a local level by the Social Value (TOMs Framework), malleable to the specific needs of the community (Carmarthenshire), recent pilot projects and School Meals Scoping Paper.

To start this journey the measuring needs to establish a precise baseline for all PSB Partners. Upon doing this the procurement opportunities will be more visible, we would have a clear understanding of the impacts for a specification of provision for Organic as an example across different food types or contracts eg Fresh Produce.

³⁷ [Industry Statistics | HCC / Meat Promotion Wales](#)

³⁸ https://www.wwf.org.uk/sites/default/files/2021-12/I4Agri_FarmerFacingGuide_Print_Sub1.pdf

³⁹ [WWF Cymru Land of Our Future Stories | WWF](#)

⁴⁰ Foundational Economy Research 2021

This all works in conjunction with the following goal to engage and support the supply chain in readiness for procurement opportunities either as stand alone, cooperatives or through the existing contract holder distribution network.

A Note on Social Enterprise in Action

Carmarthenshire makes up 7% of the total businesses in Wales and 8% of the total Social Businesses sector. Yet worryingly we have seen a 10% decrease in this sector between 2016-2020, this is against the grain of the Welsh trend which is a 12% increase. Carmarthenshire used to have the highest number of social enterprises per county in Wales (202) but now sits in third place behind Cardiff and Vale of Glamorgan (both with well-established Sustainable Food Partnerships and Local Food Strategies). Some of the largest increase in operational sectors have been in Agriculture, Food service and Community Spaces with 31% noting 'Creating Employment Opportunities' as a key social objective. However 89% reported a decrease in turnover (compared with 44% UK average) during the outset of the Covid crisis, therefore presenting an opportunity to improve the resilience of the sector to continue to impact of the Well-Being Objectives in Carmarthenshire.⁴¹

Food Production at both Primary and Secondary levels within the Carmarthenshire Social Enterprise Sector provide an opportunity for the public sector to engage proactively on business development and supplier engagement with existing wholesalers/logistics operators specifically on the introduction of new products and substitution of existing products that do not comply with a Future Generations Menu for Wales. Being progressive, innovative, and ahead of market trends could have a beneficial impact on 'exporting' local products to the regional and national supply chains, whilst maintaining value to primary production.

6. Sustainable Food Sector Jobs and Livelihoods

Target - 100% of Carmarthenshire and regional food sector jobs paid the real living wage by 2030

The need for a local/regional foundational economy that builds on the assets we have to support better business models contributing to the community value. An impact assessment on the change of budget and potential investment required to transition to the real living wage within the employer base in the food sector. Starting with those within the public sector supply chain to ascertain a baseline.

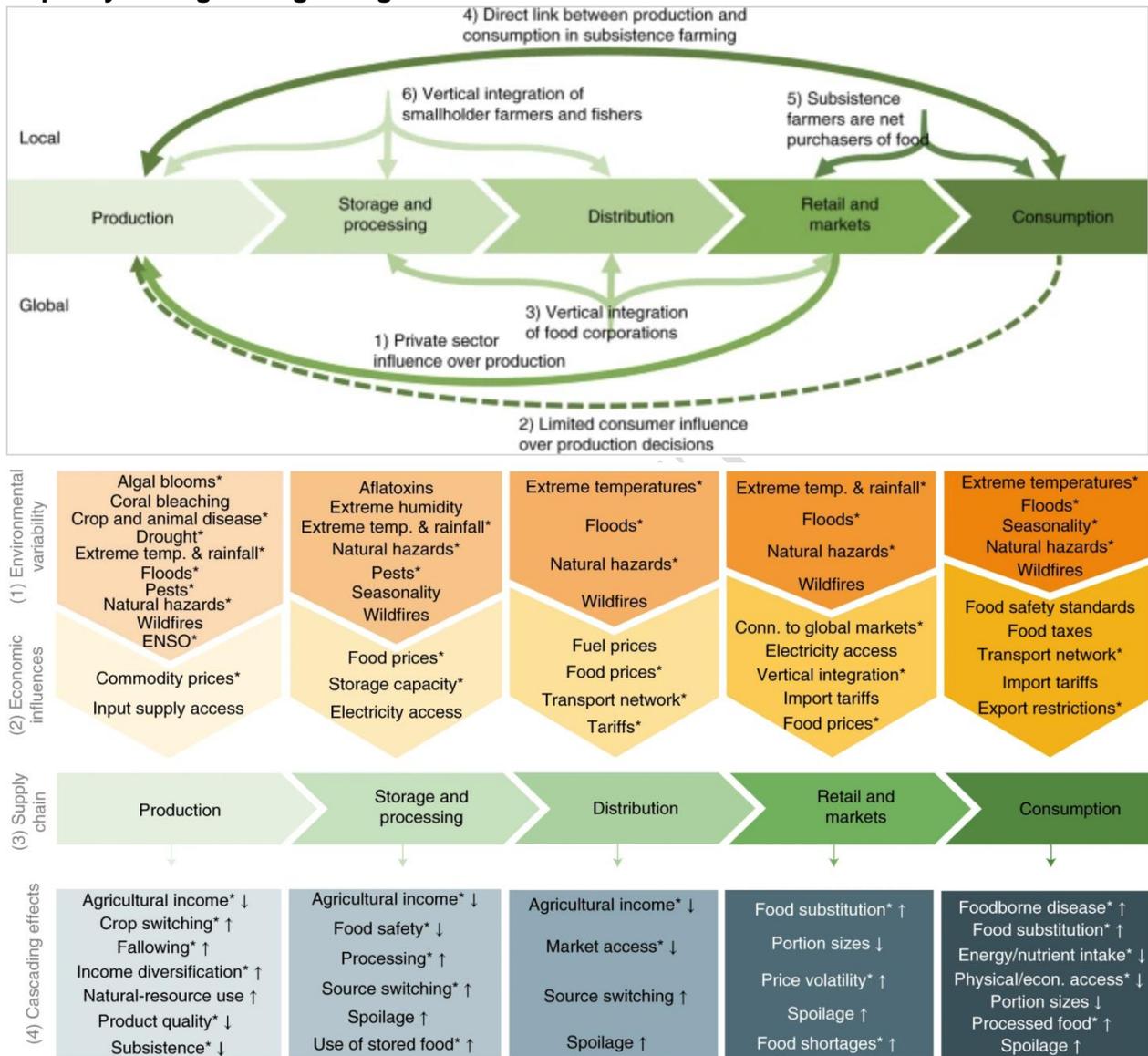
To support this transition, the development of a more localised public supply chain will enable security and resilience through contracts⁴². Enabling SMEs to plan, budget and invest accordingly, this should be supported by the economic development teams by signposting to external and internally aligning funding opportunities. Creating new and sustainable jobs and livelihoods, by producing foods that the sector requires, to the sustainability and specification standards that allow longevity of economic development.

⁴¹ [Mapping Welsh social businesses - Cwmpas](#)

⁴² [Microsoft Word - Woosnam Dairies Case Study \(Final\).docx \(escapevault.co.uk\)](#)

When addressing the issues of increasing the stock of Welsh SMEs it's clear that point policy interventions will not solve the problem, whilst working in a market that is underpinned by lost cost, low value, low margins. To create a thriving foundational economy even on a local scale in Carmarthenshire we need a suite of connected interventions, as previously outlined in brief, which tackle demand (for new volume opportunities) and supply (to shift constraints).

Capacity Strengthening Along the Value Chain⁴³



⁴³ <https://www.nature.com/articles/s43016-020-00196-3>

8. Legacy

8.1 Short-Term Action Plan (Recommendations)

Possible Recommendations

1. Conduct a full audit - of food (ingredients and products) by the PSB partners - utilising existing data on the largest provision, School Meal Supply, using the measures outlined in this report -

1. True provenance (including sustainability, ethical standards and environmental impact risk assessment)
2. Carbon Footprint (including data on distribution/import methods)
3. Current Social Value
4. Levels of processing including “ultra-processed” and reformulated ingredients like salt, fat and sugar. Most found in “Fat-Free, Reduced Salt and Sugar Free” Products.

2. Further impact assessment - of current food system “touch-points” within departments using above measures in place around provision but also to incorporate community assets of current land/farm holdings, linking potential food production opportunities with gaps in public sector provision. Leading to resourced support for transition to more sustainable farming methods for upcoming tenancy renewals or business developments via the next iteration of the Global Farm Metric (2023)⁴⁴ application through Welsh Government Sustainability Assessment. Community Assets Maps need to integrate this tool to best understand portfolios.

3. Set Clear Targets and Bring in Policy Change - A strong framework of targets is essential, as we have seen with the statutory carbon agenda. To overcome food system problems that have been fortified over decades we need long-term vision and ambitious targets to be reflected in policy.

4. Develop Costed Delivery Plans to/for

1. **Utilise the Funding Landscape** – Understanding the broad landscape that can support internal projects and external business/organisation working towards the shared objectives. Having a shared asset of this information and guidance on how it can be directed to sustainable food production both at primary/secondary production and the management of food system development.
2. **Integrate the Future Generations Menu** - guidance on what this looks like and its application in accordance with the Foundational Economy School Meals Scoping Paper. Integrate the developed menu in transition over all partners.
3. **Food Systems Management Structure** - to avoid duplication across publicly funded bodies and external activities. Allocate resources for working groups across PSB partners which can be facilitated by the Sustainable Food Places Programme.
4. **Food Culture Shift** - Project initiatives that are already operating within the region matched with additional funding and resources to align public, private and third sector around shared mission. Supporting integration of food literacy into the curriculum.
5. **Training Programmes** - Food Production spans across primary, secondary, and operational delivery within the PSB. To address current internal staff shortages within PSB food

⁴⁴ <https://www.globalfarmmetric.org/>

provision operations “push and pull” factors are needed. With the proposed reinvestment of public funds into the local economy there will be skills requirements for the food production sector. Cooperative models for sub-sectors of supply chains need to be facilitated for integration into the public sector provision and to reach the competitive potential of wider markets in the private sector.

6. **Pilot Community Eat-Well Programme** - Green Social Prescribing where health board professionals can use prevention budgets to intervene for patients suffering with effects of poor diet. Linking in with the Carmarthenshire Food Network to facilitate healthy affordable food, food education and wider support services.
7. **Develop a Rural Land Map and Use Framework** - Based on the three-compartment model, (Food, Farming and Environment) contractually supporting transition back to mixed farming either through the existing supply chain, or through sub-lotting strategy within procurement tenders.
8. **Local Food System Data Programme** - Utilising the above map and framework data in one system with “Beyond the Farm Gate” impact of food production and distribution measures on economic, environmental and health.
9. **Pioneer, Trial and Support Integration of Health and Sustainability Models** – Explore and deliver programmes – 1. Integrate a sustainability measure as part of the Saffron Software for monitoring School Food Nutrition in Meals. 2. Integrate Nutrition Skills for Life Training into educational settings for example as part of teacher training. 3. Expand and resource the ‘Food for Fun’ scheme to more schools and incorporate a local supply chain of both food production and education/activity providers. This should include more Secondary Schools and exploring the feasibility of breakfasts clubs available in that setting too.

8.2 Monitoring and Indicators

FG – Food Goals, SO – Strategic Objective

Specific Actions Column to be added later

Carmarthenshire Well-Being Plan 2023-28 Objectives	Objectives and Goals of the Food Strategy	Indicators and Measures (tbc by partners)
Ensuring a sustainable economy and fair employment	SO 3,4,5,6,8 FG 5,6	Allocation of land to sustainable food production Number of cooperatives established Gross wages in food production sector and living wage employers % of public procurement spend on regional sustainable produce Measures of social value integrated into policy No of food production social enterprises Amount of training routes, apprenticeships and pathways created

		% of direct employment from agriculture sector
Improving well-being and reducing health inequalities.	SO 1,2,3,5,7,11,12, FG 1,2	No of 'food banks' operating in county % of schools with food in the curriculum at KS1-3 % Adults overweight or obese No of priority people engaged with community food initiatives or services No of pathways out of food poverty established – including into the sustainable food economy fruit and vegetables consumption (% of eatwell guide from local production) business compliance with food safety standards participation numbers in growing activities on land assets no. of people completing and delivering community nutrition and cooking courses emergency food parcels delivered
Responding to the climate and nature emergencies.	SO 3,5,7,8,9,10,12 FG 3,4	Carbon footprint of food system % reduction of un-sustainable food and agriculture imports (eg soy feeds, factory farmed chicken) Pollution levels in rivers directly linked to agricultural activity No of farm conversions Organic/Agroecological methods and total % of local sector % of catering service serving sustainable menus Amount of regenerative commercial growing opportunities created Total carbon sequestration data on land use linked to PSA cooperatives Amount of food waste in public sector including packaging. No of commercial composting facilities set up Climate risk assessment key points mitigated by food system interventions No and integrations of sustainable food policy
Helping to create safe and diverse communities and places	SO 1+2 FG 1,6	No of hubs offering community meals, nutrition advice and food skills training No of engaged people and organisation with local 'food' networks No of people previously unemployed into food sector jobs and community activities

8.3 Risk Management

Further and iterative work needs to be done here upon finalisation of strategy.

Main Risks

1. Failure to agree strategy delivery with stakeholders
2. Lack of understanding of sector specific business needs in the region
3. Failure to secure external or internal funding to deliver holistically
4. Rise in cost-of-service provision across Public Sector Organisations
5. Failure to collaborate effectively across public, private and third sector
6. Skills and capacity issues in operational progression

9. Appendices and References – available in finalised strategy

Next Steps

- Circulation of Food Strategy development document (Draft – V1)
- PSB Partners to Feedback before May 31st.
- Partners to engage with Food Development Officer (CCC) to assimilate working groups by June 30th
- Update of Cooperation and Supply Chain Development and Food Systems ‘Horizon’ Projects available by next PSB meeting.
- Appraisal of Opportunities and costed action plan by June 30th.
- Finalised Strategy completed by June 30th. (SMART Targets, Risk Assessment, Opportunity Appraisal, Working Groups, Action Plan, County Food Systems Map, Inclusion of Community Food, Communications and Procurement Strategies)
- June 30th Food Development Officer (CCC) role ends – legacy documents and toolkits for delivery passed on.