

Y Pwyllgor Newid Hinsawdd, Amgylchedd a Materion Gwledig | Climate Change, Environment and Rural Affairs Committee  
Ailfeddwl am fwyd yng Nghymru: brandio a phrosesu bwyd | Rethinking food in Wales: food branding and food processing

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1.1 If we take a definition of food culture to refer to the practices, attitudes, and beliefs as well as the networks and institutions surrounding the production, distribution, and consumption of food then we can reasonably attempt to assess where we are in Wales in relation to our food and drink sector. This should allow us to give some consideration to the development of our food culture in recent times and the impact of public and private sector intervention in the food and drink sector.

1.2 An overview of the present strategies and policies which impinge on the agriculture, food and drink sector is a useful starting point. Amongst these are **Food for Wales, Food from Wales 2010:2020; Food Strategy for Wales, Food and Drink Action Plan; Visit Wales Partnership for Growth Tourism Strategy 2013 – 2020; The Strategic Action Plan for the Welsh Red Meat Industry; Horticulture Wales Strategic Action Plan, Dairy Sector Strategy; The Food Tourism Action Plan for Wales 2015- 2020; and Wales Seafood Strategy**. One should also draw on the **Rural Development Plan Programme 2014-2020** and **Well-being of Future Generations (Wales) Act 2015**.

[Food for Wales, Food from Wales 2010-2020 Bwyd i Gymru, Bwyd o ...](http://foodanddrinkskills.co.uk/.../Welsh%20Government%20Food%20&%20Drink%20Skill)  
*foodanddrinkskills.co.uk/.../Welsh%20Government%20Food%20&%20Drink%20Skill*  
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[Action Plan | Food and Drink - Business Wales](https://businesswales.gov.wales/foodanddrink/action-plan-0)  
*https://businesswales.gov.wales/foodanddrink/action-plan-0*

[Welsh Government | Partnership for Growth: strategy for tourism 2013 ...](http://gov.wales/topics/culture-tourism-sport/tourism/partnership-for-growth-strategy/?...)  
*gov.wales/topics/culture-tourism-sport/tourism/partnership-for-growth-strategy/?...*

[Welsh Red Meat Industry Strategic Action Plan 2015 – 2020](http://hccmpw.org.uk/index.php/tools/required/files/download?fID=5090)  
*hccmpw.org.uk/index.php/tools/required/files/download?fID=5090*

[Welsh Government | Horticulture industry](#)

[gov.wales/topics/environmentcountryside/.../foodpolicyandstrategy/horticultureen/?...](http://gov.wales/topics/environmentcountryside/.../foodpolicyandstrategy/horticultureen/?...)

[Welsh Government | Dairy industry](#)

[gov.wales/topics/environmentcountryside/.../foodpolicyandstrategy/dairyindustry/?la](http://gov.wales/topics/environmentcountryside/.../foodpolicyandstrategy/dairyindustry/?la)

[\]Food Tourism Action Plan for Wales 2015-2020 - Business Wales](#)

<https://businesswales.gov.wales/...wales/.../tourism/Food-Tourism-Action-Plan-2015-2...>

[\]Wales Seafood Strategy - Seafish](#)

[www.seafish.org/media/1659099/wales\\_seafood\\_strategy.pdf](http://www.seafish.org/media/1659099/wales_seafood_strategy.pdf)

[Rural Development Programme 2014-2020](#)

[gov.wales/.../ruraldevelopment/wales-rural-development-programme-2014-2020/?...](http://gov.wales/.../ruraldevelopment/wales-rural-development-programme-2014-2020/?...)

[Welsh Government | Well-being of Future Generations \(Wales\) Act 2015](#)

[gov.wales/topics/people-and-communities/people/future-generations-act/?lang=en](http://gov.wales/topics/people-and-communities/people/future-generations-act/?lang=en)

1.3 All these strategies and their action plans **set out different objectives and actions which often lack an alignment to provide a coherent national policy**. But it is worth noting one underlying consideration as set out in Food for Wales, Food from Wales 2010:2020 in rethinking food from Wales:

‘The environmental, health, and social impacts of our food system have become increasingly evident and concerns about the security of our food supply have grown. Resource pressures on land, water, energy, population, and biodiversity are further exacerbated by the enormous challenges of climate change adaptation and mitigation, and competition for resources’.

Food for Wales, Food from Wales 2010:2020 sets out a wide-ranging vision of the place of food in Wales, outlining a clear direction for the Welsh food industry to grow in a sustainable and profitable manner by 2020.

1.4 It would not be unreasonable for the committee to consider strategies and policies prior to 2010 and to review earlier work on **Research and Monitoring Activities 1999-2009** which was submitted to the Rural Affairs sub-committee in February 2009. Since it is useful to understand where we have been so as to know where we are going! But for the purpose of this submission a review which was carried out by The Public Policy Institute for Wales - **Food Policy as Public Policy: A Review of the Welsh**

**Government's Food Strategy and Action Plan by Terry Marsden, Kevin Morgan and Adrian Morley Cardiff University** is worthy of attention. [Food Policy as Public Policy - Public Policy Institute for Wales](#)

[ppiwi.org.uk/files/2016/06/PPIW-Report-Food-Policy-as-Public-Policy.pdf](http://ppiwi.org.uk/files/2016/06/PPIW-Report-Food-Policy-as-Public-Policy.pdf)

1.5 The former Minister for Natural Resources and former Deputy Minister for Farming and Food asked the Public Policy Institute for Wales (PPIW) to provide advice on whether the Welsh Government's Food Strategy was sufficiently comprehensive and up to date. **The review made a number of recommendations which appear to have been largely ignored. Revisiting the recommendations is advised when rethinking food in Wales.** In their conclusions, they conclude that 'weaknesses and blockages in the governance of food policy in Wales since 2010, coupled now with a greater understanding on the interconnected vulnerabilities which underpin sustainable food systems, mean that **there is an urgent need to develop a fresh and clear vision and strategy for the food system in Wales.**'

1.6 In their conclusions they also note that 'sustainable food, farming and diet need to be integrated into an overall strategy at the centre of Welsh Government policy. This needs to be complemented and connected by a decentred partnership framework across the expanding policy and stakeholder food community which now inhabits this enlarged field.'

1.7 The Brexit discussion also inhabits this field and **Food Brexit: time to get real. Tim Lang, Erik Millstone & Terry Marsden July 2017 a Brexit briefing** reflects the implications clearly. The report is taken from a U.K perspective but their key message is that the implications of Brexit for food are potentially enormous. This applies whether there is a hard or soft Brexit.

[A Food Brexit: time to get real - University of Sussex](#)

<https://www.sussex.ac.uk/.../file.php?...foodbrexitreport-langmillstonemarsden-july20...>

They also argue an U.K. food policy framework should give special consideration to the devolved nations within a revamped regional policy. A discussion which has not surfaced so far. This discussion must be a priority if we are to enable continued public-sector investment in the sector.

1.8 This leads us on to the question of where the the networks and institutions surrounding the production, distribution, and consumption of food in Wales can meet the needs of this next decade and provides the infrastructure of the industry to grow and prosper. **The report published in 2016 by the Public Policy Institute for Wales (PPIW) would suggest that there are serious deficiencies in our policy approach and implementation.**

1.9 Let us consider if we have in place the essential building blocks which we need to build our food culture. There is at present no comprehensive engagement at a national and regional level with stakeholders from across the agri-food system. If we are to engage effectively with the industry and the networks and institutions within the agri-food industry we have to re-visit how industry sectors and other interests can engage in these discussions. **The current Food & Drink Wales Industry Board does not have the independence or the resources to effectively carry out that task.** Engagement is an important element of how policies are delivered and are key in the effective delivery of strategies actions and support programmes. There must be a shared agenda amongst institutions and networks if our food culture is to flourish. This can only be achieved if all the food chain is involved from farming to hospitality.

1.10 There is no space for this to flourish at this time and goes part of the way to explain the lack of alignment between policy and action. The decision to focus the Food and Drink Action Plan on post farm gate and economic impact to the detriment of the other drivers outlined in the 2010 strategy such as food culture, sustainability and well-being, and integration, has only exasperated the situation. **The present Food and Drink Action Plan is not fit for the future while trying to identify the**

## **ground for our post Brexit agri-food industry to operate within.**

1.11 We also seem to lack a comprehensive brand architecture for food from Wales which allows us to position Welsh food in both home and international markets. The demise of the Wales the True Taste brand after significant public and private investment does appear now to have been a retrograde step. We need to decide if we are to position our food culture as distinct from other nations and regions within the U.K. reflecting sustainable forms and practices of agricultural production and environment which underpins the food chain. To achieve that we must have clear coherent brand management structures and credible messages which substantiates the brand position. This can be achieved and should reflect the whole food chain.

1.12 Welsh lamb and beef brands have successfully achieved this while Food and Drink Wales remains a descriptive statement and lacks the authority as a basis for a brand. Similarly, the adoption of the Great Taste Awards again positions our food culture further away from a distinct food culture. In contrast, the True Taste Awards celebrated those practices, attitudes, networks and institutions surrounding the production, distribution, and consumption of food in Wales and from Wales. The European protected designation achieved by many of our products have an uncertain future and if replaced by a British mark will again weaken the distinct position of our Welsh agri-food industry.

[Wales the True Taste Awards » Freshwater UK](http://www.freshwater-uk.com/services/events/case-studies/wales-the-true-taste-awards)

[www.freshwater-uk.com/services/events/case-studies/wales-the-true-taste-awards](http://www.freshwater-uk.com/services/events/case-studies/wales-the-true-taste-awards)

1.13 These issues raise key questions in rethinking food in Wales. These are structural issues which need attention in determining the capacity and the ability of the sector to meet the competing demands on our food culture in facing the challenges now and in the future, such as climate change, poverty, health inequalities and jobs and growth. Lack of clarity only leads to disjointed interventions and programmes by government and uncertainty

and lack of engagement by the food industry. What direction we want to take our food system post-Brexit needs to be understood and mapped out only then can we prioritise investment and focus on those areas where there is need for public sector intervention.