



# It is time to look to the future of food and drink in Wales.

As a country, we have faced two extraordinary years living with Covid-19 and it is fair to say that it has changed our world, our way of living, the way we work. It has prompted some re-thinking and spurred innovation at an unprecedented pace. It is also fair to say we have retained our strategic drive for food and drink in Wales. As part of our recovery, our food and drink industry has a key role – everyone eats and drinks, and ensuring our industry remains strong and resilient is one of my key objectives. With this in mind, this is a good time to both take stock and look forward, to plan how we can grow, increase productivity, become more sustainable, add value, and become a brand that is recognised for excellence around the world.

**From 2014 to 2020 we set ourselves the ambitious target of growing the industry's value to over £7bn.**

**Together we achieved – and exceeded – that goal.**



**Lesley Griffiths MS**  
Minister for Rural Affairs  
and North Wales, and Trefnydd

The heart of our success has been a true partnership between business, academia and government.

In 2019 we asked the industry to help us shape a new vision. A huge thank you to the many businesses who gave their time, insight and opinions. Your responses have helped to shape this new vision, which aims to build on that success over the coming years.

In these pages, we will set out our mission, which is to have a flourishing food and drink industry with a global reputation for excellence. We will explain how it fits into the wider goals and values that we have for our economy and society – the principles of sustainability and fairness that underpin the Wales that we want to become.

We cannot ignore the effects of Covid-19 and the UK leaving the European Union. Both continue to impact the industry, and wider society. The industry workforce has responded magnificently but we will continue to feel the aftershock for years to come.

We must not let either, however challenging, from impeding our long-term goals of promoting growth and productivity, promoting fairness in work, ensuring businesses reach for the highest levels of environmental sustainability and helping them achieve this through enhancing their reputation and

standards.

The food and drink industry, despite all the challenges it has faced, remains remarkably resilient. It is an incredibly diverse industry, with a vast range of products in its portfolio. It exists in every corner of Wales, both urban and rural.

The industry is also hugely diverse in terms of the shape and size of businesses. There is opportunity for everyone to grow and flourish: from micro to medium to large-scale – all the while proudly sharing the visions and values of Wales.

This is a team effort. It needs all of us to work together towards our shared goals. We know from previous strategies that the food and drink industry has a vital role to play in the evolution of the Welsh economy and there is a strong desire to maintain this momentum. We are clear that the objectives set out here are just the beginning and that this vision must have the capacity to be flexible so that it can respond to changing circumstance. This is vital to build on our shared success.

## Our vision.

To create a strong and vibrant Welsh food and drink sector with a global reputation for excellence, having one of the most environmentally and socially responsible supply chains in the world.

### Our mission.

Grow our businesses' scale, value and productivity.



Benefit our people and society.



Promote Wales and celebrate our success as a global Food Nation.



### Our goals.

#### Growth and productivity

Our food sector will grow faster than in the rest of the UK.



#### Fair Work

We believe in a Fair Work Wales, where everyone is fairly rewarded, heard and represented, secure and respected.



#### Sustainability

We will reach for the highest levels of environmental sustainability.



#### Reputation and standards

More businesses will earn accreditation, win awards, and attain the highest food hygiene standards.



### Our partnership.

#### Help us to help you

We are all part of a bigger picture. Wales has clear well-being goals, set out in the Well-being of Future Generations (Wales) Act. We'll work in partnership with food and drink companies who share these values, and we'll support projects that help us to reach our goals. Let's work together to create a better Wales for everyone.



## Our objectives.

These key success measures give us all a clear idea of how we are doing, and what needs more attention. We publish everything on the Food and Drink Wales website, so there is an ongoing record of progress.

We will measure progress against the following SMART goals and you can learn more about how we measure our progress here: <https://bit.ly/3qZX0Ys>

### Growth

Every year the turnover value of Wales' food and drink sector will proportionately grow more than the rest of the UK, and to at least £8.5bn by 2025.

### Productivity

The three-year average of Gross Value Added (GVA) per hour worked in the industry will increase proportionately more than the rest of the UK.

### Fair Work

Every year, the proportion of food and drink sector employees receiving at least the Real Living Wage will increase, to achieve 80% by 2025.

### Accreditation

Every year, there will be an increase in the proportion of manufacturing businesses in the industry holding accreditation (e.g. environmental management, staff development, production and other relevant standards).

### Awards

Every year, there will be an increase in the proportion of businesses in the food and drink manufacturing sector achieving awards appropriate to their business. By 2025 at least six more Welsh products will join the UK GI Scheme.

### Hygiene

98% of businesses will have a food hygiene rating of 5 by 2025.

## Other indicators.

We will monitor other important targets and indicators, too. Our dashboard will be flexible enough for us to add these (and more) when they are needed, along with historic data for earlier years.

- Number of businesses in the industry. Annual business birth rate.
- Number of businesses operating for five or more years.
- Export value for the year and historic figures.
- Total employee numbers.
- Businesses signing up to the Welsh Skills Pledge.
- Number of businesses reformulating products through Food Innovation Wales and Project HELIX.

## Where we are now?

Before looking ahead, it is worth pausing to see where we are now, and where we have come from.

During the period of our last strategy, 2014–2020, we saw:

**30% growth**, achieving record sales of £7.5bn in 2019, exceeding our target of £7bn by 2020.

**16 protected food names** — Geographical Indication (GI) products — an increase from five.

**£550m** in exports, increased from £408m.

**270** Great Taste Award winners in 2021.

In 2020 the industry employed:

**239,300** in the Food & Drink supply chain.



**£22.4bn turnover**, 27,815 business units.

**33,600** in the Food Foundation Sector.



**£7.9bn turnover**, 1,465 business units.

**22,200** employees in Food & Drink manufacturing.



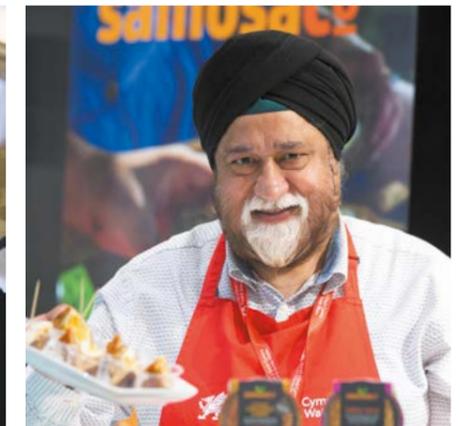
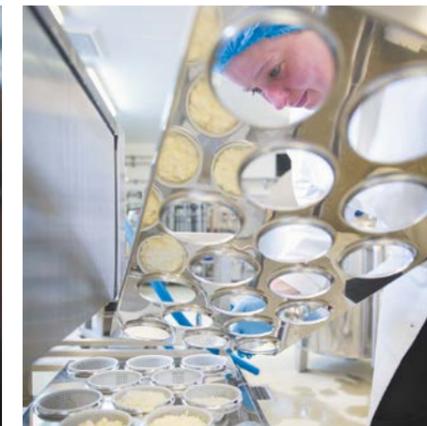
**£4.9bn turnover**, 590 business units.

For the latest Economic Reviews, go to: <https://bit.ly/3oBILYN>



## Who is this vision for?

Every business involved in the industry from retail and exporters, to tourism, wherever you are and whatever you do. It should involve everyone who works in the Welsh food and drink industry, from brewers and bakers to manufacturers and processors.



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# Everything's connected.

**Although this vision focuses on the business of manufacturing and processing, it fits into a whole range of other strategies that link us to the wider supply chain: agriculture and fisheries, packaging, wholesale, retail — they are all connected.**

This vision is all about responsible business development in a dynamic environment. It emphasises business support and development connecting to our Programme for Government commitments to make Wales a better place — building a greener economy based on the principles of fair work and sustainability — and our commitment to develop a Community Food Strategy for Wales.

In our delivery of this vision we will work seamlessly across wider policy agendas such as public health, communities, sustainability, the circular economy, decarbonisation, trade, skills and tourism. We will integrate our actions so that business development brings broad benefits. Taken as a whole, these add up to the Wales we want to project into the world: a forward-looking, progressive nation that prioritises sustainability and citizen benefit in every aspect of economic success.

Some of the wider policy areas include:

## **Well-being of Future Generations (Wales) Act 2015**

This pioneering piece of legislation drives us to improve our social, cultural, environmental and economic well-being in everything we do.

[futuregenerations.wales](http://futuregenerations.wales)

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## **Environment (Wales) Act 2016**

Our nature, land, water and air are our ultimate resource. This Act charts a new, more integrated approach to managing our natural resources for long-term sustainability.

[gov.wales/environment-wales-act-2016-factsheets](http://gov.wales/environment-wales-act-2016-factsheets)

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## **Prosperity for All: Economic Action Plan**

The Plan drives the twin goals of growing the economy and reducing inequality, with the Economic Contract at its heart: a two-way relationship between Government and business.

[gov.wales/prosperity-all-economic-action-plan](http://gov.wales/prosperity-all-economic-action-plan)

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## **Prosperity for All: A Low Carbon Wales**

This plan lays the foundations for Wales to transition to a low carbon nation, setting out 100 policies and proposals that directly reduce emissions and support the growth of the low carbon economy.

[gov.wales/low-carbon-delivery-plan](http://gov.wales/low-carbon-delivery-plan)

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## **Beyond Recycling**

A strategy to make the circular economy in Wales a reality. We are aiming to make resource efficiency part of Welsh culture, and the food and drink industry has a big part to play in the circular economy.

[gov.wales/beyond-recycling](http://gov.wales/beyond-recycling)

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## **International Strategy and Export Plan for Wales**

A collection of strategies and plans to raise Wales' profile globally, build international relations, and support exporters to rebuild post-Covid and the EU Exit with food and drink as a 'Priority Sector'.

[gov.wales/international-action-plans](http://gov.wales/international-action-plans)

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## **Healthy Weight Healthy Wales**

Our strategy covers a whole range of cultural and lifestyle initiatives, including a commitment to improve our diet.

[gov.wales/healthy-weight-strategy-healthy-weight-healthy-wales](http://gov.wales/healthy-weight-strategy-healthy-weight-healthy-wales)

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## **Economic Resilience and Reconstruction Mission**

This mission sets out our plans to recover and rebuild from the economic damage of the coronavirus pandemic.

[gov.wales/economic-resilience-and-reconstruction-mission](http://gov.wales/economic-resilience-and-reconstruction-mission)

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## **Manufacturing Future for Wales**

The plan aims to develop 'high value manufacturing' activities which have a positive social, economic and environmental impact on the well-being of Wales.

[gov.wales/manufacturing-future-wales-framework-html](http://gov.wales/manufacturing-future-wales-framework-html)

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## **Land Management: Sustainable Farming and our Land**

We will introduce an agriculture Bill to create a new system of farm support. Our Sustainable Farming Scheme will reward farmers who take action to respond to the climate and nature emergencies, supporting them to produce food in a sustainable way.

[gov.wales/agriculture-wales-bill](http://gov.wales/agriculture-wales-bill)

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## **Welcome to Wales: priorities for the visitor economy 2020 to 2025**

We will continue to encourage Welsh tourism and hospitality businesses to use, and champion, more Welsh food and drink.

[gov.wales/welcome-wales-priorities-visitor-economy-2020-2025](http://gov.wales/welcome-wales-priorities-visitor-economy-2020-2025)

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## **Fair Work Strategy**

Fair Work means treating every worker with decency and respect. It includes fair pay, equality, health and safety, and skills development.

[gov.wales/fair-work-commission](http://gov.wales/fair-work-commission)

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## A Net Zero Future.

We are developing a Decarbonisation Action Plan for the food and drink manufacturing industry. It is all underpinned by the latest research and evidence.

It is crucial that we help the food and drink industry to decarbonise — but also maximise the opportunities that the transition to Net Zero Wales provides.

Our headline vision and mission for the food and drink industry promotes reaching the highest levels of environmental, economic and social sustainability. We are encouraging and supporting businesses to develop their production practices to improve carbon footprints and resource use, such as working with the Advanced Manufacturing Research Centre (AMRC) on future concepts including the 'factory of the future'. The 'Economic Contract', which we have mentioned earlier, is the tool we will use to secure commitment and defined changes.

One of the success measures of our vision is to increase the proportion of businesses which hold independent accreditation that demonstrates adherence to specific, monitored standards.

We have mapped existing accreditation schemes relevant to decarbonisation and we will support businesses to commit to them. If we are to address these challenges, then we will need businesses to commit to this approach as a condition of government support.

We will also take specific action here in Wales to set ambitious targets to halve food waste, and prevent biodegradable materials going to landfill, by 2025. These are key steps on our journey to zero waste and net zero carbon.

To support these environmental sustainability goals, the Welsh Government will undertake research to better understand the carbon impact of the food chain and supply systems in Wales. Critical to this will be developing our understanding of how food and drink manufacturers and their supply chains contribute to the carbon budget and identifying new technologies that can reduce the carbon impact throughout the food system in Wales.

The outcomes of the research will enable the Welsh Government to develop a specific action plan which sets out appropriate steps for reducing carbon emissions across the industry. This action plan will provide direction to reduce the carbon impact of manufacturing and processing through process efficiency, energy usage and waste reduction and will link to other Welsh Government initiatives.



AB InBev are currently exploring the deployment of zero emission green hydrogen at their Magor brewery, one of the largest breweries in the UK.

## Future thinking.

This vision is about looking forward to the future. But we need to acknowledge the impact of two unprecedented challenges that hit the Welsh food and drink industry — and society — hard.

We acted quickly to support the industry through the immediate impact of the Covid-19 pandemic and the EU Exit. Our objectives were clear:

- Support businesses to survive and sustain their supply chains. Safeguard jobs.
- Help the industry recover and grow as quickly as possible. Adapt to a changing trading landscape.
- Keep sight of our long-term aims.

We have all learnt tough lessons, but we have also been inspired by the way that the industry responded. We saw people and communities coming together. We have seen businesses and workers adapt quickly, using new thinking and technologies to reinvent themselves. We are more adaptable and ingenious than we knew.

The aftershock of Covid-19 will not go away overnight, and trade negotiations will continue to unfold over the next decade. We will support our industry throughout, adapting to whatever the future throws at us — but we will keep focusing on the long-term vision.

In the long run, and despite Covid-19 and the UK leaving the European Union, our fundamental goals remain the same. To improve productivity, grow connectivity, and add value.

To build businesses that are innovative, resilient and sustainable.



Quite apart from Covid and the EU Exit, these key drivers of change will shape society over the coming years.

### Ageing population

Advances in medical care, along with declining birth rates, means that the global population is getting older.

### Economic downturn

Economic momentum was slowing even before the Covid pandemic, pushing many countries into recession.

### Environment under stress

Consumption of energy and resources continues to rise.

### Political polarisation

Disillusionment with the establishment has caused a rise in populism.

### Spotlight on health

Rising prosperity has led to an increase in processed food, to the detriment of health.

### Women in the workforce

In the next two decades, around 1 billion women will enter the global workforce.

### Widespread connectivity

Mobile and internet penetration continues to rise globally.

### Working with technology

The global workforce will reach higher levels of automation and tech innovation.

### Urbanisation

The economic and demographic weight of big cities will increase.

## Key trends that shape consumer choices in food and drink:

Fluid lives.

Sustainable responsibility. Digital expansion.

Elevated experiences. Trust and identity.

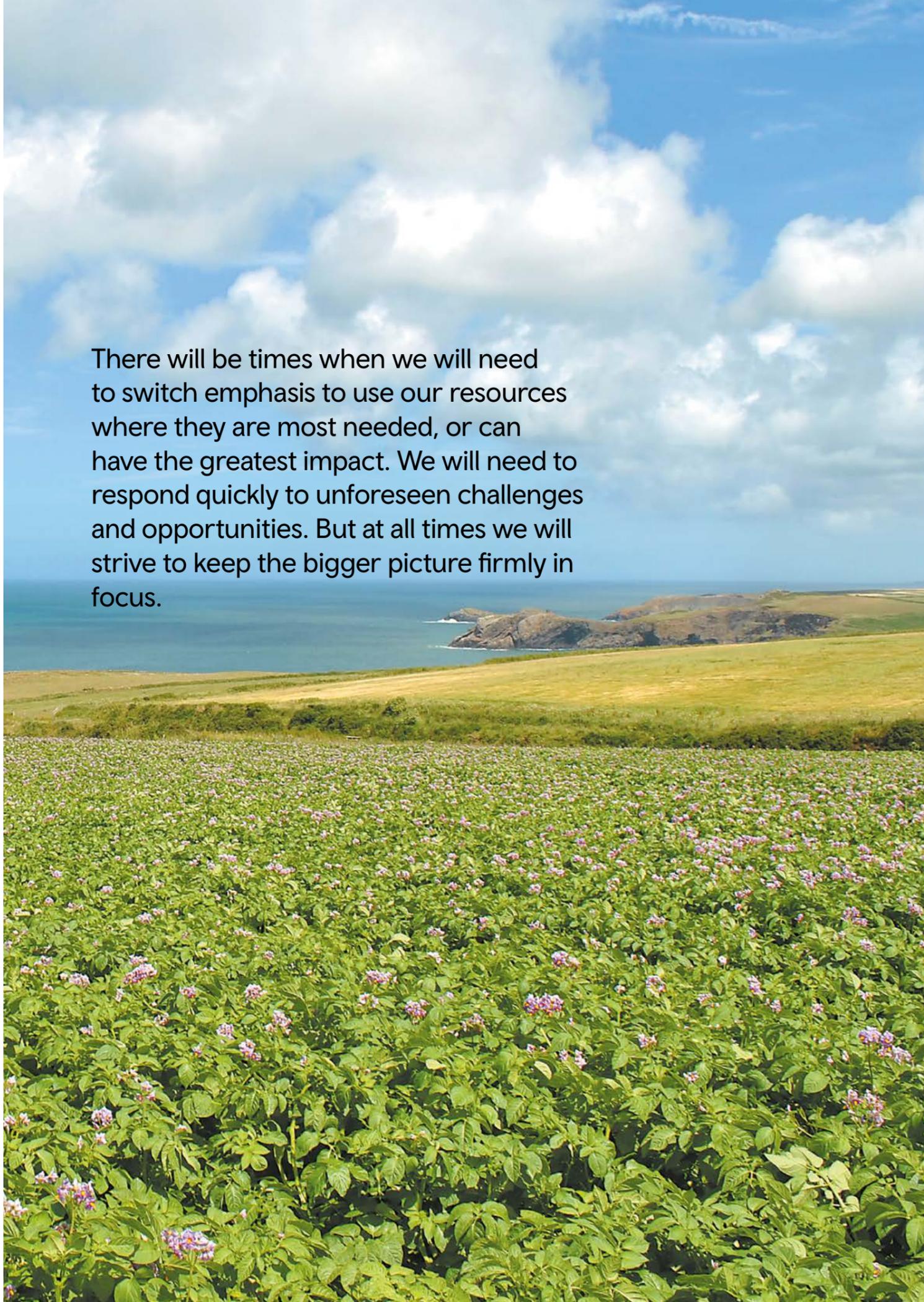
Living well.

## Delivering our Vision: 10 key actions.

We will deliver them through the five ways of working of the Sustainable Development principle of the Well-being of Future Generations (Wales) Act by thinking and acting for the long term, seeking integration, involving others, collaborating, and taking preventative action.

We will focus on five themes:

- 1** Whole system support to meet the wide ranging needs to deliver business resilience and enable sustainable growth.
- 2** A food chain approach through close collaboration with stakeholders throughout the wider food system.
- 3** Policy developed on extensive research and evidence encapsulating innovation, technology and automation and taking account of the many cross-cutting food related policies.
- 4** A world class food and drink industry with a sustainable brand reputation nationally and in overseas markets and attracting investment to Wales.
- 5** A food and drink industry which delivers fair work, skills development and career pathways.



There will be times when we will need to switch emphasis to use our resources where they are most needed, or can have the greatest impact. We will need to respond quickly to unforeseen challenges and opportunities. But at all times we will strive to keep the bigger picture firmly in focus.

Delivering our Vision: 10 key actions.

## 01. Knowledge is power.

**You cannot make the best decisions unless you are acting on the best intelligence. Our Insight Programme has the latest information on markets in Wales, UK and countries worldwide. It is the bedrock of the advice we offer through one-to-one business support and via our cluster network programme. We commission research and source data, and we are constantly scanning the horizon for emerging trends and markets.**

We make a lot of this research freely available through seminars and on our website — [businesswales.gov.wales/foodanddrink/welsh-food-drink-performance](https://businesswales.gov.wales/foodanddrink/welsh-food-drink-performance)

You will find everything from industry overviews to deep-dives that give you the detail.

Our Economic Review provides detailed information on the performance of the industry, covering turnover, employment, and business counts across the key food and drink sub-sectors. The Welsh Food and Drink Annual Export Bulletin drills into the value and volumes of food and drink exports, while the Labour Market Intelligence Report has detailed information on employment, demographics, skills, earnings and job vacancies.

## Achieving competitive advantage.

The Insight Conference is an annual three-day event, in partnership with Food Innovation Wales, featuring the latest data and predictions from expert speakers and panel discussions, helping you to understand your market, horizon scanning, and how to develop your business. It is designed to give insights that are both valuable and relevant, with conference sessions tailored to the needs of different business areas.

### Radnor Hills Water Company — getting ahead of the game.

“We found the presentations and market data during the Insight Conference extremely useful. Our marketing team built these case studies into decks and proposals and it is having some very strong results. Hopefully this will continue forward in the coming years as the landscape is always changing and these insights set us apart from the pack.”

[radnorhills.co.uk](https://radnorhills.co.uk)



Delivering our Vision: 10 key actions.

## 02. Survive and thrive.

**We are in this for the long haul. We want every business to grow bigger, better and stronger.**

**To become more productive, profitable and competitive, year on year. To seize opportunities to automate. To be sustainable in every sense: economically robust, but also championing the values of decarbonisation, environmental sustainability and Fair Work.**

We need to equip business owners with the right management and leadership tools: the business planning, financial management and people development that are the nuts-and-bolts of running a strong business.

We need to help businesses to recruit, retain and train the right talent, and to improve skills in every discipline. We are asking businesses to help attract young people into the industry.

We want everyone to strive for the highest industry standards in everything they do.

We want every business to achieve accreditation and awards, a powerful means of building Brand Wales' reputation for excellence.

Above all, we want to stimulate a powerful sense of innovation: food and drink pioneers who are unafraid to push ahead and explore new frontiers.

### Coaltown Coffee — a blend of ambition and ethics.

Coaltown Coffee was set up in 2014 with just two members of staff with one ambition: to bring work back to their hometown of Ammanford. They focus on sustainable trade with small farms from across the coffee growing regions of the world.

In 2019 they achieved Certified B Corporation status — a hallmark of a new kind of ethical business, balancing profit with people and the planet.

Coaltown now employs 14 local people and is expanding to Swansea and Cardiff.

[coaltowncoffee.co.uk](http://coaltowncoffee.co.uk)

## Recognition.

It is good to be recognised and rewarded for doing good things. It is also a powerful way to build trust in your customers and enhance your reputation in the marketplace.

Trade buyers look for reputable industry accreditation. Consumers expect the highest food hygiene standards and search for the products they trust. Achieving this recognition is a powerful marketing tool that informs consumers, at a glance, that your product can demonstrate due diligence, too, send a strong message that reverberates throughout the supply chain, elevating our status as a sector.

The more we build these relationships individually, the better for all of us collectively.



“During a trip to New York in 2017, funded by the Welsh Government, we came across the B Corp brand a lot,” says founder Scott James. “We had always closely followed American trends, and B Corp appealed to us as it was everything we believed in as a company. It proves that products are ethically sourced and that the business has as much of an ethical conscience as possible. This certification sets you apart from the crowd and appeals to key modern food manufacturing producers.”

© James Bowden

Delivering our Vision: 10 key actions.

### 03. Build networks.

**The last few years have shown just how fragile supply chains can be, especially when they stretch across continents. We learnt the value of keeping them short and local — collaborating within our communities to support our economy in Wales.**

Our food and drink industry has always had this collegiate sense of working together: the power of ‘clustering’ to share resources and ideas. But we can go further.

We can deepen and broaden the cluster model in all parts of the industry, crossing boundaries into other sectors of our food and drink industry. We can link with research, training and technical expertise. We can form powerful new alliances.

This is good for everyone. It creates more opportunities, adds value, spreads best practice, and keeps wealth within our communities. It will allow us to bring forward new products and ideas, and develop a more efficient and effective approach to communication and co-operation.

#### Dylan’s — pivoting the downturn.

Regional restaurant group Dylan’s took on the existential threat of Covid and turned the crisis to its advantage. In March 2020 they developed pizzas and soups to sell through local retailers across North Wales, and then created a range of restaurant-quality ‘Dylan’s At Home’ ready meals. In 2021 they founded a Baked Goods and General Store and opened their first dedicated premises in Menai Bridge.

Dylan’s continue to champion local produce in rural North Wales. “Going direct to farm — for example, Dolmeir farm on Anglesey for our Welsh lamb — has provided us and their family with a reliable, friendly and long-term relationship which has contributed significantly to the stability of both our businesses”, says David Evans.

Communicating the provenance and heritage of the At Home range was also important. They are immensely proud to place ‘Gwnaed ar Ynys Môn’ — ‘Made on Anglesey’ on their packaging, with bilingual messaging on all products.

[dylansrestaurant.co.uk](http://dylansrestaurant.co.uk)

“Through this incredibly difficult period, we were very fortunate to have the support of Welsh Government who have always proven to us how much they value the food economy in North Wales,” says director David Evans. “Funding enabled us to support our full workforce and invest in the business to ensure we come out of the pandemic stronger.”



© Dylan's Restaurant

Delivering our Vision: 10 key actions.

## 04. Turn weakness into strength.

**We are doing a lot of things right. But we want to identify areas where we are either underperforming or there's scope to scale-up businesses to the next level, and stimulating growth in areas that will benefit everyone.**

For instance, we can look to build the capacity of Wales-based aggregators and wholesalers.

These can be focal points for producers, helping them to build local supply networks and then to reach into a wider market. This in turn would attract investment in building food-grade premises that capitalise on the latest low-carbon tech.

We will continue to help create new businesses through our Cywain business support and we will promote the sector to BAME communities to highlight both the business opportunities and the career pathways. But we also want target business expansion so more small businesses become medium-sized, and medium to become large — with the power to project a positive image of the entire Welsh food and drink industry into the wider market.

And as they grow, we will help companies to attract investment, so that Welsh businesses can thrive.

### The Parsnipship — a fertile land for organic growth.

The Parsnipship began life in 2007 as a literal cottage industry to address the meagre offerings available to vegetarians and vegans. Now with new accreditation and the support of Welsh Government, The Parsnipship is taking its creations into the food service sector and to larger retail outlets.

The business grew organically, moving through foodie events into wholesale, helped by Welsh Government along the way. "We have had their support for years," says Flo. "We enjoyed mentoring through Cywain, the advantages of being involved in the Welsh Government's Fine Foods Cluster, and now all the benefits of SALSA Accreditation we have gained with support from the ZERO2FIVE Food Industry Centre. You need the badges, but the advice and guidance is also invaluable."

[theparsnipship.co.uk](http://theparsnipship.co.uk)



Delivering our Vision: 10 key actions.

## 05. Technical back-up.

**In Wales we have a network of research and innovation centres to be proud of. It joins up considerable knowledge and expertise and ensures that innovation is at the heart of Project HELIX, the Advanced Manufacturing Centre Wales, and AberInnovation, all of which work hand-in-hand with our food and drink industry.**

Food Innovation Wales and Project HELIX have supported food and drink companies to grow, innovate, compete and reach new markets. We will expand and extend our capacity to provide the most appropriate technical support, joining forces with other partner organisations.

The Advanced Manufacturing Research Centre (AMRC) in Flintshire is part of a network of research and innovation centres. They are helping the region's manufacturers to access advanced technologies to improve productivity, performance and quality. They are also collaborating with Welsh Government and the Food and Drink Federation (FDF) Cymru to support manufacturers to de-risk innovation and accelerate sustainable growth.

AberInnovation, offers world-leading expertise within the biotechnology, agri-tech, and food and drink sectors.

All of our research and innovation is driven by industry needs and global challenges such as food security, sustainability and climate change.

We want our industry to keep tapping into this exciting resource and maximise the latest tech and ideas to become better, greener, more efficient, more sustainable.

## Turning innovative ideas into practical reality.

**From new start-ups to established businesses, Food Innovation Wales is on hand to provide technical and commercial support. It is based at three food centres across Wales:**

**Food Centre Wales** in Llandysul provides technical services to business start-ups, SMEs and national food manufacturers, with a suite of modern facilities and four incubator units.

**Food Technology Centre** in Llangefni has a range of modern pilot and industrial scale equipment to undertake all aspects of new product development through to a successful product launch.

**ZERO2FIVE Food Industry Centre** at Cardiff Metropolitan University has experienced food and drink technologists, business specialists and academics who specialise in all aspects of food and drink innovation.



Delivering our Vision: 10 key actions.

## 06. UK market.

**Welsh produce deserves to take a prominent place on the shelves of every retailer in the UK. Our Retail Plan focuses on major UK retailers, confirming our commitment to increasing the sales and profile of Welsh produce.**

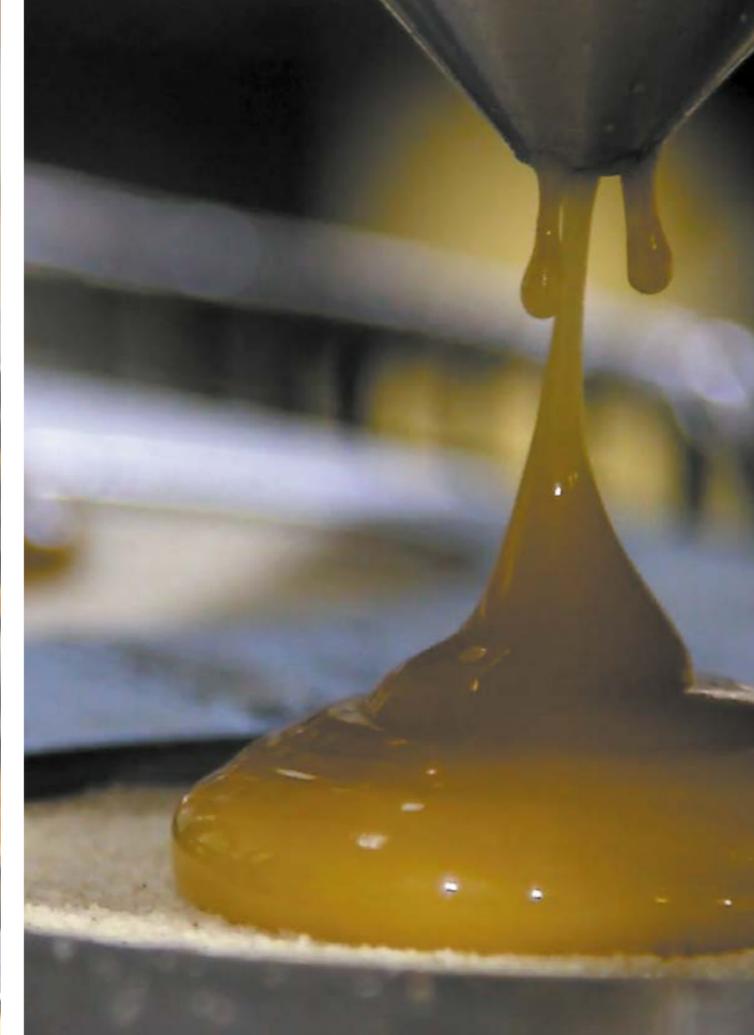
We also want to make significant inroads into the service and wholesale sectors, so that Welsh products are finding multiple routes to market.

This means strengthening the whole supply chain: the demands of food service are markedly different from those of the retail sector, products do not translate easily from one to the other. There is a need to understand the changing elements of foodservice and consumer behaviour.

At the same time, there has been a big shift towards direct to consumer (DTC) marketing and selling which brings huge opportunities. We will support individual and aggregated businesses to sell direct or through online marketplaces.

Food and drink plays a major role in helping to revitalise our high streets and communities. We will endeavour to include food and drink in regeneration schemes wherever possible.

We will support and promote selected food markets and festivals, and also continue to link with inward tourism, using opportunities to build our presence in targeted locations across the UK.



### Tregroes Waffles — building on trust.

Over 140,000 waffles a week, 7 million waffles a year — that's the staggering output from the West Wales town of Llandysul and the home of Tregroes Waffles, a delicious and distinctive brand seen all over the country from Waitrose to Transport for Wales.

"Welsh Government has done really well over the years," says founder and Welsh-speaking Dutchman Kees Huysmans. "They had the very commercial vision to help small producers like me, and created an awareness of local food products, making the public and retailers much more open to buying Welsh."

Llandysul is the 'centre of the universe' for Kees, and it is here that the company is expanding in the mould of John Lewis, with Kees' family selling shares each year: "The 20 staff have part-ownership in the business through a trust we have established, and that gives them a say in our future. They are looking to increase capacity, so we have been working with the Development Bank of Wales to put a new structure next door where we can increase output dramatically."

British Retail Consortium (BRC) accreditation allows Tregroes to supply national supermarkets, as well as a myriad of independents. They work with Food Innovation Wales on training and collaborate with Wales Co-operative Centre. They are embedded in the local community, working with schools, the Womens' Institute, Merched y Wawr and local charities, whenever possible.

[tregroeswaffles.co.uk](http://tregroeswaffles.co.uk)



## 07. Export market.

**There is a growing awareness around the world of the Welsh brand, and an increasing demand for our goods. We know from research that the word 'Welsh' denotes high standards of quality, ethics, and artisanship.**

BlasCymru/TasteWales is our flagship event, bringing together producers, buyers and food industry professionals at this signature international food and drink trade event and conference. We will continue to champion Welsh produce around the world, at trade shows and events. Our biggest export market is the EU, but we also perform strongly in key markets like North America and the Middle East. We will continue to focus on our target markets, working with UK Government and other administrations to maximise market opportunities.

The EU Exit has brought challenges, of course. As the UK forges new trade deals, the export picture will unfold over the next decade. We will do all we can to help smooth the transition to this new reality.

Welsh Food and Drink exports were worth £550m in 2020. The top destinations were Ireland, France and the Netherlands. Three quarters of the value went to the EU.

Food and Drink goods exports increased by £115m between 2016 and 2020. The highest value export categories in 2020 were beef, lamb and meat products, followed by dairy products and eggs.

We are determined to build on this success. Our Export Action Plan, launched in 2020 as part of our economic strategy, has strong links to our Economic Action Plan and our International Strategy for Wales. It includes our food and drink industry as a priority sector.

To support food and drink businesses looking to export, or explore new global markets, we will continue to evolve our programme of virtual and physical trade missions, financial support for export-related research and trade show attendance, and tailored advice. Our Export Cluster now has more than 100 members and continues to attract business members. It is part of the Food and Drink Wales Cluster Network, which brings together suppliers, academia and government with the key objective of helping businesses achieve accelerated growth in sales, profit and employment.

It is important that we continue building on the good reputation of our food and drink industry and its products. Wales is well known for its commitment to meeting and maintaining the highest environmental and welfare standards, lowering its carbon footprint and reducing waste. We will use trademark food events such as our BlasCymru/TasteWales, maximising 'Brand Wales', and expanding the suite of food and drink products with Geographical Indication (GI) to showcase provenance.

Looking into the future, we will be expanding our horizons wherever and whenever new possibilities emerge. For some businesses — like the seafood sector, who export 90 per cent of their catch — it is essential. For other businesses, this might present a first chance to spread their wings internationally.

Exporting with passion.



### Rhug Estate — quality is our greatest strength.

“Success at Rhug is down to the strength of the Wales brand, and I just hope that the quality of Welsh products will be nurtured and protected, because people buy quality.” That’s the view of Robert Wynn, Lord Newborough, who farms the 12,500-acre Rhug Estate in North Wales.

A passion for sustainable organic farming led Lord Newborough to convert the operation in 1998, and now Rhug Organic is a brand which carries the Royal Warrant and appears on Michelin-starred menus around the world. In recent years the Estate has added a farm shop, with up to 3,000 Welsh and artisan items, a cafe, take-away and a drive-through.

“From selling our produce in vans outside the front gate to developing our wholesale business through top-end London restaurants, we have grown by not taking no for an answer,” says Lord Newborough. “Welsh Government support has helped with marketing and proved an invaluable resource to date. The International Trade Development Programme enables us to reach out to customers at shows and trade events, and to explore new markets.”

[rhug.co.uk](http://rhug.co.uk)

Delivering our Vision: 10 key actions.

## 08. Build our brand.

**When it comes to promoting Brand Wales, we are building from a very strong foundation. We know from our research that Welsh produce has a great reputation for being high-quality, wholesome and expertly made.**

So it is a case of building on our existing strengths, using a 'hero and halo' approach. We want to develop a family of 'hero' products that represent the very best of Wales. We will promote these vigorously, helping them to drive sales and dominate their markets.

The 'halo effect' follows naturally: the whole industry can benefit from a strong core of high-profile brands. By association, the reputation of Wales as a whole will be increased further.

It is also important to develop a bigger and stronger range of Geographical Indication (GI) products, to boost our reputation for high-quality heritage products.

## Value of Welshness.

Recent research has shown that promoting a clear 'Welsh' identity on products often adds considerable value to our our remarkable brands.

Over 80 per cent of shoppers polled in Wales would prefer to buy Welsh products, with 72 per cent wanting more Welsh food and drink in their shops, and 62 per cent believing it is very important to have Welsh produce on menus.

Welshness is seen to signify great quality, and there is a strong association between Wales and the countryside / nature.

### White Castle Vineyard — the future's rosy.

White Castle Vineyard have proved that Welsh wine can compete with the world's best. In a blind tasting, their Pinot Noir Reserve 2018 became the first Welsh vintage to win a gold medal at the 2020 Decanter World Wine Awards. They now have plans to expand the vineyard by another 2,000 vines to 7,000 and create a winery for their own PDO brands, as well as helping other Welsh producers.

Set on a 16th century farm in the idyllic hills of Monmouthshire, White Castle produce around 7,000 bottles per annum. Two-thirds of the business is through food tourism, with coach tours coming from as far afield as France. They are now looking to capitalise on the climate change-driven boom in Welsh wines.

Robb is also chair of the Welsh Vineyards Association. He says, "We are totally behind the clusters and the collaborative approach in Wales, widening our networks and getting us national and international profile through events. I'm so proud to carry the Welsh brand."

[whitecastlevineyard.com](http://whitecastlevineyard.com)



"It is great what they have done to date," said owner Robb Merchant of the support he receives from Welsh Government. "They had the foresight to see the importance of food and drink to the economy of Wales, and they are willing to back quality products."

## 09. Attract investment.

**At some point, promising businesses need to invest in their future. But growth for its own sake is not enough.**

**Industry feedback tells us that the right support at the right time can be important for businesses, especially at crucial junctures such as moving from 'new' into 'regular' business, and when taking opportunities to expand.**

Therefore we are developing an investment pathway that supports businesses in choosing the right investment, at the right time, with the right partners. We have a range of mechanisms including business finance solutions, and services to provide businesses with solutions that are right for them.

It could mean investment in food-grade premises to increase the number and range of properties available and the flow of market information, or research and innovation support, or help with attending shows and trade events to increase visibility and establish connections.

We are keen to attract inward investment into Wales, to create new businesses or bring step change to those already here, to be partners in building our success.

Any kind of investment needs to be right for the industry, right for the individual business, and fit in with our broader strategic goals about the Wales we want to be. But if your business is ready to take it to the next step, or you want to invest in Wales, then so are we.

### Puffin Produce — invest in new tech and feel chipper.

Over 60,000 tonnes of Welsh potatoes are washed, sorted and packed each year at Puffin Produce in Haverfordwest, with their Blas Y Tir and own brands prominent in major retailers throughout Wales.

Puffin's annual turnover is up to £27m with 180 employees at peak season. Over 80 per cent of output is grown within 15 miles of the firm's Pembrokeshire base; 85 per cent of potatoes are packed and distributed, with the rest going into food service, while surplus spuds go into stock feed, so there is zero food waste.

"With Welsh Government support and grants, we have been able to invest £9m in expanding and increasing automation in the factory, boosting efficiency, and reducing our reliance on eastern European labour. Like other producers in the sector, we need to be alert to future opportunities offered by our relationship with Europe, and so we keep up to speed with industry news and developments."

*puffinproduce.com*



Managing director Huw Thomas says, "The Blas Y Tir brand has developed a reputation for quality and we have long term deals with our retail customers, providing stability to growers across Wales."

Delivering our Vision: 10 key actions.

## 10. Share our values.

**Our approach to the food and drink industry has a key role in creating a prosperous and resilient Wales. A society that is healthier, happier and fairer, with a vibrant culture and thriving Welsh language. A greener Wales that is globally responsible. It means in every decision we make we consider the long-term impact.**

We are guided by the Well-being of Future Generations (Wales) Act, a pioneering piece of Welsh legislation that drives us to improve our social, cultural, environmental and economic well-being.

When we support businesses and organisations in Wales, we are both signing up to an Economic Contract and more importantly, you will need to demonstrate that you are putting these values into practice: Fair Work, low-carbon, sustainable use of natural resources, climate resilience, the promotion of well-being, and economic adaptability.

We believe that everything is connected. Our vision does not simply consider social, moral and ethical arguments. We are taking a 360 degree scan of where we are, what we do and how we can improve, to the benefit of all in our industry.

**We see this as crucial to a prosperous economy. We all have our part to play in creating a better Wales.**

Image right: Gareth Stevenson, Green Michelin chef, Palé Hall, North Wales





**Bwyd a Diod Cymru**  
**Food & Drink Wales**

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