

Our ambition to further develop Wales' food and drink sector – Analysis of consultation findings



Bwyd a Diod Cymru
Food & Drink Wales

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A copy of this report is also available in Welsh.



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1. Introduction

This report sets out the findings of the consultation on the Welsh Government and Food and Drink Wales Industry Board's joint proposals for a strategic plan to further advance the food and drink sector in Wales for the period 2020-2026.

The new plan aims to build on the previous action plan 'Towards Sustainable Growth', which had a target of growing sector turnover to £7 billion by 2020. Highlights of the previous plan include:

- Turnover of £6.8 billion by 2018, up from £5.7 billion in 2013
- 16 protected food names, up from 5 in 2013,
- £539 million of exports, up from £399 million in 2013

The new plan has a vision and mission, three key aims and SMART targets which were consulted on as follows:

- **Developing our businesses** - To grow the sector's scale and value, and businesses' productivity – *measured by increased turnover above CPI plus growth in GVA per hour*
- **Benefitting our people and society** - helping businesses to provide wider benefits through fair work, developing skills and using resources sustainably – *measured by increased number of businesses signing the skills pledge, signing up to Courtauld 2025 and paying the Welsh real living wage.*
- **Promoting Wales as a food nation** – to showcase the sector, building on the success of Blas Cymru to open up trade and new market opportunities, developing high standards and celebrating success – *measured by number of Great Taste Awards, industry accreditations, food hygiene ratings and foreign direct investment.*

The consultation ran from 23 July until 15 October 2019. Responses were invited by email or through an online system. There were also consultation events where views were collected. Following the close of the consultation the findings were analysed.

In total 86 responses were received. Just under half of the responses were through the online system providing specific answers to the consultation questions (see Appendix 1). The other half of responses were by email, some answering the consultation questions, and some providing more general points. All of the responses were reviewed, and where possible, the points made by consultees were allocated to the specific questions. Where more general points have been made, these were collated and the findings fed in at the appropriate place.



2. Type of Respondents

The 86 responses were categorised by respondent type. Table 2.1 shows that businesses formed the largest group of respondents followed by trade organisations and business support organisations. Trade organisations for agriculture, meat, food and drink manufacturing, hospitality and countryside were all represented. Seven individuals also responded. The remainder of responses were spread across a large number of categories as shown in the table.

Table 2.1 Type of Respondents by Number and Percentage

| Type of respondent | Number | Percentage |
|---|-----------|-------------|
| Business | 37 | 43% |
| Trade Organisations | 12 | 14% |
| Business Support | 10 | 12% |
| Individuals | 7 | 8% |
| University, College and Training | 5 | 6% |
| Third Sector | 4 | 5% |
| Environment Organisations | 3 | 3% |
| Local authorities | 3 | 3% |
| Other (public health (2), social, community and consumer organisations) | 5 | 6% |
| Total | 86 | 100% |

In terms of business sub sector, Table 2.2 shows that the Drinks sector was well represented, while the three major sub sectors in Wales (Dairy, Meat and Bakery) were much less well represented amongst respondents. There were 7 non-food respondents.

Table 2.2 Business Respondents by Sub sector

| Sub sector | Number | Percentage |
|----------------|-----------|-------------|
| Drinks | 12 | 32.4% |
| Dairy | 5 | 13.5% |
| Delicatessen | 2 | 5.4% |
| Retail | 2 | 5.4% |
| Seafood | 2 | 5.4% |
| Store Cupboard | 1 | 2.7% |
| Meat | 1 | 2.7% |
| Bakery | 1 | 2.7% |
| Cereals | 1 | 2.7% |
| Confectionary | 1 | 2.7% |
| Ready meals | 1 | 2.7% |
| Wholesale | 1 | 2.7% |
| Non-food | 7 | 18.9% |
| Total | 37 | 100% |



3. Overall Findings

The overall findings suggest broad agreement with the thrust of the proposed strategy.

- 90% agreed with the overall Vision and Mission (n=84).
- 85%-90% agreed with the key aims. There was a fall-off in those answering as the questions progressed (from 61 to 55) which is typical of surveys.
- 82% agreed with the SMART targets (n=49), though there were several suggestions for improvement of targets – see later.

The number of respondents disagreeing was very small across all areas with a maximum of 6 disagreeing with aspects of the people and society aim – see later.

No food and drink producing businesses disagreed with aims 1 and 2 while only one disagreed with aim 3, the reason for disagreement being wanting to do it more quickly.

Table 3.1 Overall Levels of Agreement

| Theme | Number of Completely Agree/Agree | Percentage based on respondents answering | Number of Completely Disagree/Disagree |
|-----------------------------------|----------------------------------|---|--|
| Vision and Mission | 76 | 90% (n=84) | 0 |
| Developing our Businesses | 55 | 90% (n=61) | 5 |
| Benefiting our People and Society | 51 | 86% (n=59) | 6 |
| Promoting Wales as a Food Nation | 47 | 85% (n=55) | 3 |
| SMART targets | 40 ¹ | 82% (n=49) | 0 |

¹ 17 of the 40 suggested changes/amendments to the targets.



4. Findings on the Vision and Mission

Some quotes highlight the range of responses to the feeling on this aim:

'I totally agree with the proposed vision and mission to enhance the Welsh food and drink sector.'

'I think it is fantastic to have a pro-active and supportive government in developing our food and drink industry.'

'Support world-renowned sector with environmentally and social responsibly supply chains with benefits to people.'

'Any opportunity to promote Wales as a food nation following Brexit must be a priority.'

'We support Brand Wales – farmers manage 80% of the Welsh land area'

'Agree but might be worth adding sustainability to drive provenance.'

'The concept of developing Wales as a quality food producer is an excellent strategy.'

'More R&D focus needed.'

'Agree with 'most environmentally and socially responsible supply chains' but not to grow scale of businesses.'

'Market forces drive industry. Government's role is to create the foundation for the private sector to flourish. Consumer demand will shape the sector.'

'Need international niche profile... focusing on the highest environmental standards combined with added value.'

'That you are supporting all businesses in Wales, even micro companies is good. Although I would add to grow UK wide before globally.'

'Both are laudable but overlook the vital importance of the creation of local food networks and vibrant local smaller food businesses. Only by this approach can we hope to meet the challenges of the climate crisis, the state of the nation's health and a widespread poverty of food-experience.'

Several respondents acknowledged the uncertainty of Brexit on the sector but the need to plan ahead nonetheless.

Despite the stated intention that the strategy was for the food and drink manufacturing sector (Foreword p6) there was considerable discussion from respondents about the need for a holistic strategy covering the whole supply chain from agriculture to consumers and allied industries such as tourism and hospitality. Also a suggestion for more of an environmental focus.

The need for research and innovation to support the sector was highlighted by a significant number drawing on the resources already within Wales.

A group of 27 children aged 9 to 11 surveyed as part of the consultation were asked whether they agreed or disagreed with each of 10 'big ideas' from the Government's vision and mission for the future of food and drink in Wales. The majority of the children agreed with 8 of the 10 ideas. The two ideas the majority did not agree with were:

- To produce enough food and drink in Wales for more people in the future



- To put more money into producing food and drink in Wales.

Simply producing more was not seen as a good thing by the children and might lead to more pollution, packaging and waste.

4.1 Disagree do differently

Vision and mission are clear but generic. Perhaps define what 'excellence' means in Wales for example 'excellence in high quality, regionally distinctive products'.

Consider elevating Social Responsibility above Environmental to highlight the difference of Brand Wales' approach.

Mission: Consider using the 3 words Scale, Skills and Global Success.

Embed sustainable development. Is on-going growth sustainable?

Grow faster.

Growth needs to include high quality and enhancing reputation.

Focus on developing future foods.

Local food networks.

Raise growth targets but be careful raising the costs of businesses.

Ensure negative externalities are accounted for.

Include agriculture.

More emphasis on the seafood sector.

More collaboration with hospitality is an opportunity to transform Welsh economy.

Integrate with the Food Tourism Action Plan.

More needed to address hunger, health inequality, obesity and climate emergency.

4.2 Other comments

Need to nurture micro-producers into main stream markets to allow them to grow.

Strategy should highlight Wales' research and innovation strengths.

Welcome the principle that businesses receiving support in whatever form will be conditional on them contributing to the nation's wellbeing.

While some respondents recommended a strong focus on Welsh foods such as dairy, drinks, meat, bread and seafood; others wished to encourage production of foods in line with a plant-based diet.

One respondent felt ethical business practices would be worth including in the vision.

One respondent highlighted a need for a focus on basic infrastructure to support growth and investment in Wales.



5. Findings by Key Aim - Developing our Businesses

Some quotes highlight the range of responses to the feeling on this aim:

'Recognise need to grow scale of sector and productivity'.

'Welcome growth and productivity targets as competitive businesses must be at the heart of a thriving Wales'.

'Greater publicity for innovation schemes e.g. R&D tax credits, Innovate UK etc'

'Need to market the food sector in Wales as a centre of excellence to attract young people'

'I am pleased that Food Innovation Wales, Future Foods and IBERS are key to the strategy to encourage innovation'.

'Themes of collaboration, skills development, innovation and technical support are great.'

'More needs to be said about ways to help businesses become more environmentally conscious'.

'Fantastic proposals, to have support in this sector in Wales from Welsh Government is so important for manufacturers'.

'The emphasis on increasing employment and skills in the industry is significant, as rural-based SMEs are often the most vulnerable businesses; it is important that opportunities exist for employment in food businesses to support rural economies, and that more and more people are encouraged to work in the industry.'

'Wales is made up of small businesses and the focus should be on developing the UK market to strengthen distribution, scale and capacity; then develop international markets'.

'Wales needs to be thinking bigger, and getting more to the root of the challenges we are facing'.

'Don't forget the major opportunity in the UK pet food sector'.

'Agree but need more ambition - also profitability as a metric'.

'Affordable premises are required for growth'.

'Improving efficiency to reduce costs is paramount'.

'Support to business should be conditional on high quality employment, skills development and fair work'.

In general, there was seen to be a need for more focus on innovation and the environment. Views were mixed on the 2% above CPI target – some seeing it as too ambitious with others seeing it as lacking in ambition.

A group of 27 children surveyed as part of the consultation found 8 (30%) suggesting they would want to work in a food or drink job in the future. 12 thought they would not, and 4 were not sure.

5.1 Disagree do differently

The 2% target on turnover is too low.



Themes such as provenance, ethical practices, social and environmental responsibility are not mentioned in this section which is a shame as this market is large and in growth. Include supply chain development and new methods of reaching the consumer. Need to be careful about adding cost to the sector. Need to develop a more resilient Welsh food system. Experiential food programmes to help sell products. Gap analysis to identify where more processing facilities are required.

5.2 Additional activity needed

Training in business management, leadership and entrepreneurship for SMEs and start-ups. Engineering and food tech centres of excellence in Welsh universities and colleges. Development of 3D ocean farming including seaweed, fish and shellfish. Development of controlled environment agriculture. Mentoring between non-competing businesses. More emphasis on sustainable development. Resilience should include environmental resilience. Financial support for start-ups. Food and drink automation academy. Stronger links with agriculture and tourism to present a combined strategy. Identification of long term research objectives of benefit to industry.

5.3 Can you contribute?

39 respondents felt they could contribute to the proposals. Several businesses felt that they were already contributing through their business activities. Comments made included the following:

- Growth in apprenticeships, traineeships and new staff.
- Skills diagnostic of Food Skills Cymru.
- Changing behaviour through social science and psychology research.
- Helping businesses understand consumer behaviour for healthy choices.
- Red meat supply chain cluster.
- Contacts and networks in academia, food supply chains and businesses.
- Reducing food waste.
- Aberystwyth Innovation and Enterprise Campus to support knowledge transfer from the research base to business.



6. Findings by Key Aim - Benefiting our People and Society

Some quotes highlight the range of responses to the feeling on this aim:

'Investing in our employees is key'

'Long term training and upskilling will only benefit society'

'Positive but need to include horizon scanning of future food and skills development as well as raising standards for existing businesses and food types'

'Brands with purpose is a key theme for many new brands to connect with consumers as seen at Tuck In conference'

'Right strategy but SMEs and micros need support more than large enterprises'

'We benchmark ourselves on an international basis in respect of these elements and we and our supply chain are audited by the largest global retailers in our compliance.'

'Greater emphasis could be placed on healthy eating, especially among children.'

'Support Wales becoming a zero waste nation'

'Need smarter public procurement'

'Good but need to ensure companies are not squeezed more by large customers. 1. must not be voluntary or customers will not want to pay for it. 2. Needs press coverage so it is known about by customers. 3. Give plenty time to implement it. 4. Cannot just be Welsh as otherwise it will undermine Welsh competitiveness versus England.'

There were roughly equal numbers of respondents with opposing views (5-10 holding each view) concerned on the one hand about increasing costs for businesses that would make them vulnerable; and on the other hand that the proposals should be more far reaching and radical. One commented *'Keep it focused as it is complex enough'*.

More succinct messaging was suggested by one as follows:

'The Welsh Government commits to support businesses which demonstrate adherence to clear KPIs for:

- *Production of healthy foods*
- *Ethical corporate social responsibility*
- *Sustainability and efficiency*
- *Waste reduction*
- *Upskilling and increasing quality employment*
- *Supply-chain integration and "Lean" principles'*

A group of 27 children surveyed as part of the consultation found 13 (48%) suggesting they were already being taught enough about healthy eating and drinking. 9 said they wanted to be taught more, and 5 were not sure. Extra things the children would like to be taught included:

- What foods are actually Welsh foods?
- How exactly particular foods make you put weight on
- How to make and cook healthy foods
- The history of when and where different foods were discovered
- Who thought up particular recipes?



6.1 Disagree do differently

Need more emphasis on the benefits for industry as margins are tight.

Caution in increasing business costs vs strengthening further and being more radical.

Need to define living wage as Real Living Wage set by Living Wage Foundation.

In-work poverty is an issue that requires the Real Living Wage.

Widen the social and community opportunities beyond SHEP. Businesses should engage with community and small-scale local food initiatives as part of building local food culture.

Look at the damage that traditional food businesses and supply chains are doing to the health of the population and the environment.

More emphasis on environmental targets and plant-based diets.

Need to address perceptions of the industry for new entrants.

Focus on training in deprived areas.

Concern that businesses need reliable agency labour.

Address seasonality to improve career opportunities and year round jobs.

Include behaviour change for consumers towards healthier products.

Make compliance with the measures compulsory for businesses to receive grant support.

Sourcing to maximise the food from Wales feeding the people from Wales.

Less unhealthy food.

6.2 Additional activity needed

Greater recognition of the natural productive capacity of Wales, grassland production, and sustainably produced grazed red meat. Support low throughput abattoirs to supply the independent and artisan markets.

Recognition of need to have healthier food production and diet in Wales.

Environmental targets e.g. net zero CO₂, 50% reduction in methane by 2030, reduced food miles and reduced imports of high carbon foods.

Unified recycling across Wales.

Prevent surplus food going to landfill via initiative such as FareShare Cymru.

More promotion of local produce and links to Welsh language.

Mental health in the workforce focus.

Need baselines for the indicators and more R&D.

Strategy needs to work with Healthy Weight: Healthy Wales Plan

Perceptions of working in the sector need to be improved with clear career paths for apprentices and training for managers

The school curriculum should support the full career pathway

6.3 Can you contribute?

33 respondents felt they could contribute to the proposals. Several have on-going activities in Wales such as business support that are already contributing. Other specific contributions mentioned included:

- Already paying more to retain staff.



- Taking on extra staff.
- Food Skills Cymru could help monitor targets on pledges.
- Reducing or repurposing food waste via FareShare Cymru.
- Bringing together thought leaders.



7. Findings by Key Aim - Promoting Wales as a Food Nation

Some quotes highlight the range of responses to the feeling on this aim:

'100% on board with these proposals'.

'Our geography and our Welshness gives us a huge advantage'.

'80% of our land is not suited to crops but is suited to grass production for protein for meat and dairy.'

'Exactly right focus as consumers are increasingly looking for quality'.

'A whole Wales package will add value to Welsh marketing effort internationally'.

'Team Wales - why not have a pledge card for businesses'.

'Some of the best food and drink businesses but ... logistical links still a barrier'.

'High production standards with audited evidence such as SALSA and BRC are critical to supply chain confidence'.

'Brand Wales needs to go beyond the status quo to include ambitious biodiversity targets, sustainable resource management and standards above the regulatory baseline'.

'Create a food accreditation system for Wales perhaps with WG dragon symbol to be used by accredited companies as a mark of quality, ethical trading, fair employment practices etc.'

There was a feeling that the domestic market should be exploited as much as export markets and that provenance and quality need to be at the heart with a clear plan for post-PGI food names. One felt it was a good start but needed to go further. Another highlighted that high production standards will be vital post-Brexit. One highlighted a need to value all Welsh products, including indulgence, as they are important for exports as high value quality luxury products. This was in response to perceived claims that Wales should only produce 'healthy' food products. Another highlighted the importance of maximising value from Welsh commodity production. Blas Cymru was seen by many to be established as having an important role in promoting Wales.

A strong theme within the responses was the need for a combined approach to food and tourism taking account of Welsh culture, environment and provenance, including strong links to farming and increasing local produce in local outlets for tourists.

Two questioned whether lamb exports were sustainable given the climate emergency, suggesting an emphasis on healthy diets and plant based diets with low environmental impact.

One noted that several key categories are weak in Wales' supply base such as snacks or healthy snacks. A challenge is to develop companies that produce products in 'on trend' categories. With strong marketing it was felt these can become UK and international success stories.



The importance of public procurement including a 'local' requirement in contracts was raised by several. While for businesses, having confidence to invest that the market return is there was raised, highlighting that many businesses arise from small ventures.

There was also discussion about education of buyers, school children and adults on the benefits of local food and drink.

Expanding assurance schemes to encourage animal welfare, environmental improvement and adding value to products would be welcomed.

A group of 27 children surveyed as part of the consultation found 20 in favour of this proposal. Welsh Cakes was the most popular Welsh product mentioned and felt to be worthy of a protected food name. It was felt that the daffodil, as a uniquely Welsh symbol, could be used on food and drink labels to show Welshness.

7.1 Disagree do differently

Do it quicker

Make sure businesses recruited to overseas trade shows have capacity to scale up.

Set higher production standards.

Promote food technology as a career.

More joint working across Government departments.

Improve Welsh restaurant standards and use of local produce.

Have Blas Cymru in the north of Wales.

7.2 Additional activity needed

Human health should be mentioned and related to Welsh diet to give a health message similar to the Mediterranean diet. Wales has all the elements to do this.

Develop a Welsh sustainable/environmentally friendly certification for farms that have extra biodiversity etc.

The strategy should identify the overseas growth markets and develop a plan for each with business support focused on these territories.

Use Welsh societies to promote Welsh food and drink abroad.

A more co-ordinated approach to advertising, social media, events etc with a common theme and centred around Blas Cymru.

Promoting at English food festivals.

More showcasing of Welsh products from less prominent sub sectors.

More linking and sharing of resources across organisations including Government and others.

Develop more on-trend products.

More EH inspections to pick up products with adulterations.

CPD records for businesses could be recorded through Food Skills Cymru.

Links with early years and schools to educate on food. Workforce training on balanced diets, budgeting, shopping, cooking and meal planning. R&D for hard to reach groups on encouraging healthy food environment.



More focus on sustainable very short local supply chains and local awareness and celebration of very local food.

7.3 Can you contribute?

36 respondents felt they could contribute to the proposals. Apart from individual businesses 'doing their own bit', specific contributions mentioned included:

- University research to develop and define the 'healthy Welsh diet' similar to the Mediterranean diet
- A Sustainable Business Review to help companies be more sustainable www.sbreview.co.uk
- Student placements into businesses
- Sharing university capabilities more widely into businesses
- Helping other companies in the same sub sector
- Developing the clusters
- Providing research on provenance, origin brands and use of diaspora to drive exports
- Helping deliver business accreditation
- Digital platform to showcase Welsh brands and provenance
- Top 30 businesses group of non-competitors working on supply chain issues and mentoring other business leaders

7.4 Other comments

Large supermarkets and food service companies need to be involved in the discussion Part of Wales' distinctive is its small businesses. Encouraging them to grow may lose distinctiveness and uniqueness.

Innovation, enterprise and incubation.

Often have to jump through hoops to get support.

SBV seems focused on domestic market not export

Collaboration across the supply chain is vital.



8. Findings on SMART Targets

As stated earlier, 49 of the respondents commented on the SMART targets with high levels of agreement (82%) overall. Several amendments to the targets or alternative/additional targets were suggested as set out below.

8.1 General Comments

Most felt that the targets were the right ones with one commenting *'a clear vision of what must be achieved'* another stating *'we must not be cowed by Brexit'*. Several respondents felt there was a need for more ambition overall – reaching targets sooner or at a higher level. One noted that these were not 'targets', but rather indicators. Several commented on the need to keep standards aligned with the rest of the UK.

Several noted a need for more joined up policy between food and drink, environment, health and well-being, agriculture and land management. It was seen to be unfortunate that this consultation was running at the same time as the Sustainable Land Management one. It was felt that the targets should be designed to encourage and favour Welsh primary produce in the manufacturing sector and to be clear on the value going back to Welsh farmers.

Several noted that there were no targets relating to sustainable management of natural resources including land. The potential for economic targets to conflict with environmental and land management objectives was also highlighted.

One business commented that *'Accreditation is onerous and customers do not ask for it'* and that they have very little waste. For them the targets were not the right ones.

8.2 Issues with targets

Target 1 – 3 respondents felt it might be too conservative. The lack of baseline data was seen to be an issue. One felt that business failures and reasons for failure could be tracked and understood.

Target 2 – a robust index-linked GVA target for Wales was seen to be lacking, in particular, Wales' position relative to the rest of the UK. One felt that this was not a target that businesses would recognise and that margin per kg might be better or something that businesses can assess their contribution with. One questioned what the baseline was. *'What is growth annually? For example, a 0.1% increase is growth – but would this be acceptable?'*

Target 3 – very few gave specific figures for the W,X,Y,Z. One suggested it should be the *number* of individuals benefiting from the skills pledge or living wage. Another suggested 100% should be achieved for all targets.

W – Skills Pledge – one was *'less convinced on pledges as they are not binding'*



X – Courtauld agreement 50% of businesses. WRAP suggested that instead of Courtauld, a target for commitment to the Food Waste Reduction Roadmap and TMA (Target, Measure, Act) implementation could include:

- 100% of large food manufacturing businesses to commit and implement the FWR Roadmap by 2026
- 50% of medium sized businesses by 2026

Y – 100% of Welsh businesses should pay the living wage – seen as very ambitious by several, especially for low margin businesses and ‘a massive risk’. It was suggested by one that the Welsh Living Wage is replaced with Real Living Wage. Another suggested reducing zero hours contracts might be a better target.

Z – 40% School Holiday enrichment programme – several suggested this should be less specific and more about contributing to the community in other ways with a percentage of total staff time or turnover.

Target 4 – there was some confusion about the wording - does it mean that 80% would have BRC on completion or 50%? What number of businesses does 30% represent? The fact that the target is a number (300) and the information is given in % does not allow for a meaningful comparison to be made. More ambition was suggested ‘a target of 50% in 6 years is not consistent with a Food Nation - I'd be looking at 75% in 6 years’. Another suggested a target of 100%.

It was felt it may be difficult to achieve for micro businesses and that financial support to achieve accreditation would be required. It was also recognised that accreditations drive productivity so the targets are interlinked.

Target 5 – it was felt by several that high standards of food hygiene should be a given so is this really a target? Also if the sector is at 88% now, the final 12% may be challenging to achieve. One felt that improvement should be targeted for those with less than 3. Another felt that the target needs to be more specific, ‘95% to be 100% with a hygiene rating of 4 or more by an earlier date than 2026’.

EHO standards were felt to be different across Wales, with possible training needed while there is seen to be a need for more EH officers to actually carry out the inspections.

8.3 Other targets and indicators to be considered

A wide range of alternatives were suggested as set out below:

Target 1 Profitability target or margin per kg produced.

Target 2 should it be increase per unit sold not per hour worked?

Targets 4 and 5 - Levels of FDI, exports and international collaborations could replace these targets.

Innovation rates (new to firm and new to market products and processes).

R&D tax credits and/or R&D funding secured.

Environmental targets including recognising the dual role of livestock production with reducing environmental impacts e.g. carbon storage in the soil and encouragement of upland habitats through cattle grazing.



Public procurement of Welsh produce and/or Welsh manufactured products.

Number of Welsh listings in credible business league tables e.g. Sunday Times Top Track 250.

Automation target.

Power of effective marketing perhaps linked to sales.

Reducing waste and improving resource efficiency e.g. on-pack recycling information, reducing water usage and a GB wide deposit return scheme for packaging.

Sustainable food systems, health, safety, animal welfare and environmental impact.

Proportion of companies with collective bargaining.

specific targets for the GHG emissions of Welsh food & drink, and hunger levels in Wales.

A national food production indicator as Wales only produces 60% of its food and declining.

More food education.

More local markets in schools.

Healthier food offers available and taken up.

More emphasis on short supply chains and local production/consumption.

More focus on the game meat sector and its potential contribution.

One suggested a full suite of alternative targets:

- 1) An increased investment of £1 million per annum in skills training and CPD for the Welsh agri-food sector
- 2) An improvement in Total Factor Productivity of the agri-food sector by 2% per annum
- 3) An improvement in diabetic and CHD levels of 3% per annum
- 4) A reduction in GHG emissions by the agri-food sector by 3% per annum
- 5) A reduction in diffuse pollution from agri-food by 5% per annum
- 6) A reduction in non-recyclable waste from the agri-food industry by 75% in 10 years
- 7) A reduction in food waste of 4% per annum



9. **Appendix 1: Consultation Questions**

Chapter 1: Our Vision and Mission

Question 1: What is your feeling in relation to our proposed vision and mission?

Question 2: If you do not agree with this proposed vision and mission, what would you do differently?

Question 3: Any other comments?

Chapter 2: Developing our Businesses

Question 4: What is your feeling in relation to our proposals?

Question 5: Do you agree with the areas we have identified for support and the commitment we ask businesses to make?

Question 6: If you do not agree with the areas we have identified or commitments, what would you do differently?

Question 7: Is there any additional activity needed which we have not identified?

Question 8: Can you contribute to achieving our proposals?

Chapter 3: Benefiting our People and Society

Question 9: What is your feeling in relation to our proposals?

Question 10: Do you agree with the areas we have identified for support and the commitment we ask businesses to make?

Question 11: If you do not agree with the areas we have identified or commitments, what would you do differently?

Question 12: Is there any additional activity needed which we have not identified?

Question 13: Can you contribute to achieving our proposals?

Chapter 4: Promoting Wales as a food nation

Question 14: What is your feeling in relation to our proposals?

Question 15: Do you agree with the areas we have identified for support and the commitment we ask businesses to make?

Question 16: If you do not agree with the areas we have identified or commitments, what would you do differently?

Question 17: Is there any additional activity needed which we have not identified?

Question 18: Can you contribute to achieving our proposals?

Chapter 5: The partnership we seek with the food and drink sector

Question 19: Do you have any other comments?

Question 20: What is your feeling in relation to the SMART Targets?

