

BWYD A DIOD CYMRU FOOD AND DRINK WALES



Llywodraeth Cymru
Welsh Government

www.gov.wales



Farmers' Markets and Food Events

Success factors and lessons learnt

March 2016

Welsh Government Contact

Food Division
Welsh Government
FoodDivisionalBusiness@wales.gsi.gov.uk

Front cover image: Wrexham Farmers' Market
All images are courtesy of the Welsh Government

Summary

About this Document

This research was commissioned to contribute to the development of a more in-depth understanding of the opportunities for food and drink businesses that choose to directly market their produce through farmers' markets and/or other regular food events. The objective was also to identify factors that have been key to the success of established farmers' markets and food events, as well as any lessons learnt.

Most research has its limitations and this study is no exception. Due to the limited resources available to undertake the study, it was not possible to contact each of the markets identified to check whether they were currently active. For the survey element of this research, there was no comprehensive database of producers who attend markets in Wales which could be used. Accordingly, the sample used was taken from the list of producers who exhibit at food festivals funded by the Welsh Government. Such limitations, whilst not unusual for this type of study, need to be taken into account when considering the findings of the research.

Setting the Scene

The Welsh Government has set a clear strategic objective for the food and drink sector in Wales, which is to grow by 30 per cent by the year 2020. Decisions made by Government about the interventions that they carry out, or the support that they provide, should be outcome-driven. Farmers' markets should not therefore be supported without certainty of the beneficial impact and contribution to the wider remit of the Welsh Government.

The question is therefore as follows: Can farmers'/food markets contribute to achieving the Welsh Government's objective for the sector? And if so, how? These are questions discussed in this report.

The traditional definition of farmers' markets includes a focus on local producers and produce. This study has, however, found that food markets have evolved, as has the food and drink supply chain, with a range of 'direct sales' approaches now potentially open to producers. As such, the discussion about supporting farmers' markets should have happened in conjunction with a broader discussion about using direct sales as a means of helping producers to grow.

Prevalence in Wales

This research identified a total of 108 markets in Wales. The focus was on markets which included food and drink within their offer. They did not, however, have to be specifically farmers' or food markets. Thirty-five of the markets identified themselves as 'farmers' markets'.

Previous Interventions

There have been a number of initiatives that have sought to support farmers' markets in Wales. A number of initiatives have been criticised for having been largely developed independently of farmers, growers, and market organisers. This led to a change towards an 'industry-led' approach, whereby projects and ideas were invited by the Welsh Government from within the sector. That approach did not, however, lead to any projects being developed, leading to a suggestion that there may be a lack of capacity within the sector. The question that this inevitably raised is whether there is any point in any further attempts to develop the sector in these ways.

The funding of Fork2Fork from 2009 was a recognition that it was possible to support farmers' markets (and direct selling more generally) by seeking to stimulate demand from the public (i.e. consumers). An evaluation of the project found that the ultimate success of that initiative in respect of increasing the demand for local produce and produce directly from producers is very difficult to judge. The recognition that there is a 'demand-side' approach to increasing direct sales, as well as the 'supply-side' approach, is, however, important.

The 'industry-led' approach is continuing for the current Welsh Government-led Rural Development Programme (2014-2020), with a range of projects and programmes currently under development. However, those overseeing the development of the food and drink sector in Wales need to be aware that the experience of previous Structural Funds programmes in Wales suggests that there is a risk that such an approach could be difficult to coordinate and lead to a lack of a clear strategy.

Benefits of Farmers' Markets and Lessons Learnt

Research undertaken into the benefits of farmers' markets and markets more generally is positive. Markets have been found to generate a wide range of positives, including economic, social and environmental benefits. This potential to generate multiple benefits could be very advantageous to the public sector, as it provides an opportunity to contribute to the achievement of multiple objectives via a single intervention. Indeed, the Well-being of Future Generations (Wales) Act 2015 puts a responsibility on public sector organisations in Wales to consider a number of well-being goals and the principles of sustainable development within their activity.

It is, however, less clear whether the impact is strong enough when combined or in any one of those areas to justify the intervention when compared to the potential impact of alternative uses for the inevitably limited funding available.

Interviews with Producers

Interviews were undertaken with 112 producers, 62 who attend farmers' markets and 50 who do not. Perhaps the key findings are that producers who attend farmers'/food markets perceive them as having been very important in the development of their business.

Whilst obviously important, sales are not the only reason why producers value the markets; having contact with customers and the opportunity to discuss their product with them is at least as important if not more so. Footfall in the market is therefore understandably a key factor for producers. Location, especially in respect of distance from the base of the producer, is, however, also very important.

Interviews with Market Organisers

Telephone interviews were undertaken with 60 individuals responsible for markets with food within their offer in Wales. Those interviews identified the range of people and organisations involved in managing markets in Wales, including small voluntary groups, businesses, and local authorities; it is far from a homogenous group. This is likely to mean that any intervention in the sector could be more complicated than may be apparent at first glance. One size is very unlikely to fit all.

Many of the issues identified during the interviews were consistent with those identified in literature about farmers' markets, especially in respect of the key ingredients for a successful market, most notably the need to be able to provide a range of high-quality local produce, something which was not always easy to do.

Most respondents described their market as being financially sustainable. Most also said that they were currently receiving little (if any) support, financial or otherwise. Increasing footfall and competition from supermarkets were, however, considered to be key challenges facing markets. Promotion and advertising of the market were therefore the most commonly identified support needs, which is consistent with the producers' views when they were asked to comment on the support needed to help markets to develop.

Conclusion

Returning to the question with which we began, can supporting farmers'/food markets help to deliver the ambition of the Welsh Government to grow the sector by 30 per cent by 2020? The simple answer to that question would seem to be 'yes'. It probably can by helping the businesses that attend the markets to grow. What this study is unable to say is whether this is the most effective and efficient way of helping those businesses to grow; potential alternative ways of achieving the outcome are not explored in this report.

Whilst the focus should be on the producers, the positive spillover benefits generated by markets should not be ignored, especially in light of the change in approach required with the introduction of the Well-being of Future Generations Act. These spillover benefits would include the social benefits that markets can generate within the local community and the contribution that a market can potentially make to the regeneration of town centres by drawing people into the area.

The suggestion that the focus should be on supporting the development of 'direct sales' by producers, rather than exclusively on sales via farmers' or any other types of markets, should not be read as a recommendation that markets should not be supported; markets are one of the tools available to the Welsh Government and likely to have an important role to play, especially in respect of the direct contact between producers and consumers that they facilitate. A focus purely on markets would, however, not seem appropriate, given the way in which the sector and the supply chain are continuing to evolve.

Supporting food markets does not, however, necessarily mean providing support directly to the markets. We foresee three very broad areas or points where intervention could potentially take place along the supply chain:

- a) Support for producers which enables them to sell their produce directly to consumers;
- b) Support for food markets as a means of creating a relationship between producers and consumers; and
- c) Support which increases the demand for produce supplied directly by producers.

Only approach (b) involves supporting the markets directly. Both approaches (a) and (c) would, however, benefit markets by increasing the standard and range of producers able to trade at their events and the footfall at events respectively.



Roath Market, Cardiff

Farmers' Markets and Food Events

Success factors and lessons learnt

Main Report

Contents

Summary	2
Introduction	9
Setting the Scene	10
Previous Public Sector Interventions in Wales and Initiatives under Development ...	15
Literature Review: Benefits of Farmers' Markets and Lessons Learnt	23
Prevalence in Wales.....	26
The Views of Producers	29
The View of Market Organisers.....	36
Conclusions.....	45
Appendix 1: Detailed Guidance on FARMA Farmers' Market Certification.....	50
Appendix 2: Summary of Phases of the Fork2Fork Initiative	53
Appendix 3: Projects under Development	56
Appendix 4: Literature Review and References	58
Appendix 5: References	64
Appendix 6: List of Markets Identified.....	67
Appendix 7: Case Studies	69

In November 2015, the Welsh Government's Food Division commissioned Wavehill to undertake research to contribute to the development of a more in-depth understanding of the opportunities for food and drink businesses that choose to directly market their produce through farmers' markets and/or other regular food events. The brief was also to identify success factors for established farmers' markets and food events, as well as any lessons learnt. The research also draws on the knowledge and experience within Wavehill as the authors of the evaluation of a wide range of projects and programmes in Wales in recent years.

The research undertaken in the preparation of this report included:

- A review of published literature regarding farmers' markets and previous initiatives to support the development of markets in Wales (Chapters 2, 3 and 4);
- An estimate of the number of markets in Wales (Chapter 5);
- Telephone interviews with a sample of over 100 producers in Wales about farmers' markets and food events, particularly how they benefit from exhibiting (Chapter 6); and
- Telephone interviews with a sample of 60 market organisers in Wales to discuss a range of issues about their markets (Chapter 7).

The report concludes with Chapter 8, which draws together the conclusions of the research.

A substantial amount of additional information has been provided in the appendix which may be of interest to those who would like further information.

Setting the Scene

Key points

- The Welsh Government's ambition is to grow the value of the food and drink sector in Wales by 30 per cent by 2020.
- There has been an increasing emphasis on improving efficiency within the food and drink supply chain over the years in response to changing customer expectations and increasing competition.
- The basic definition of a 'farmers' market' is a food market where local farmers and producers bring their produce for sale directly to the public.
- Food markets are, however, evolving and a number of other types of markets exist which share the same common aim, which is to allow producers to sell their produce directly to consumers.

Strategic Context

Any review of the strategic context in which a publically funded project or programme in Wales is operating now needs to start with the [Well-being of Future Generations \(Wales\) Act 2015](#). In the words of the Act, it has been designed to *"make public bodies think more about the long term, work better with people and communities and each other, look to prevent problems and take a more joined up approach"*.

It puts in place seven well-being goals which the public sector organisations listed (including Welsh Ministers) *must* work towards achieving:

- A prosperous Wales;
- A resilient Wales;
- A healthier Wales;
- A more equal Wales;
- A Wales of cohesive communities;
- A Wales of vibrant culture and thriving Welsh language; and
- A globally responsive Wales.

Importantly, they are *a set of goals*; the Act makes it clear that the listed public bodies must work to achieve all of the goals, not just one or two.

The Act also puts in place a ‘sustainable development principle’ which tells organisations how to go about meeting their duty under the Act. Five things are identified that public bodies need to take into account to show that they have applied the sustainable development principle:

- The need to balance short-term and long-term needs;
- Acting to prevent problems occurring or getting worse;
- Integration with and potential impact on each of the well-being goals and the objectives of other public bodies;
- Collaboration with others; and
- Involving people.

The [Programme for Government](#) is the Welsh Government’s ‘roadmap’ for the 2011-2015 National Assembly for Wales’ term. It includes a commitment to the development of a delivery plan to support the delivery of the strategy for the food and drink sector, Food for Wales: Food from Wales. The Food and Farming Sector is considered by the Welsh Government key to the Welsh economy and, as such, is one of its nine [priority sectors](#).

[Towards Sustainable Growth: An Action Plan for the Food and Drink Industry 2014-2020](#) was published by the Welsh Government in 2014 and details an ambition to grow the Welsh food and drinks sector by 30 per cent by 2020, to an industry turnover of £7 billion.

Key areas of action within the plan include:

- Setting up a Food and Drink Wales Industry Board to provide industry leadership and direction;
- Further development of a trade identity (‘Food and Drink Wales’);
- Education, Training, Skills and Innovation;
- Business Growth and Market Development; and
- Food Safety and Food Security.

Business Growth and Market Development is of particular relevance to the issues discussed in this report. Actions identified within that theme include:

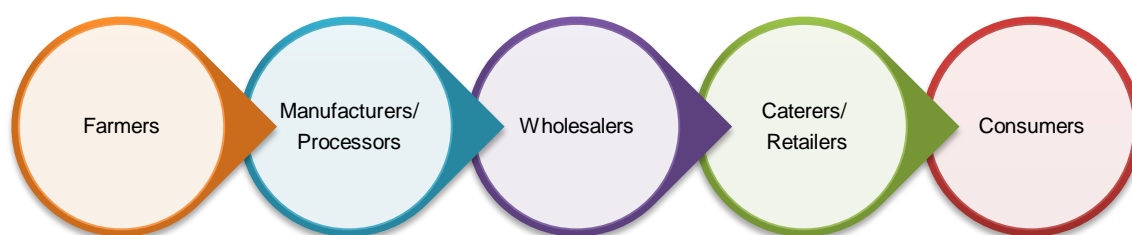
- More support towards supply chain integration (action 22);
- Developing options for a food distribution/operations plan for food businesses in Wales to overcome the problems and costs faced by small businesses accessing the marketplace (action 23); and

- Support for a range of business- and community-led events and tourist attractions in Wales capable of raising the profile of the Welsh food and drinks industry. The need to refine the process of identifying the most appropriate support for individual events which recognises the wider initiatives and added value of many events to local economic development, educational activity, and market development is also noted (action 36).

The Food and Drink Supply Chain

There are references throughout this report to the food and drink supply chain, which starts with the primary producers and ends with the final consumers. It therefore includes primary production (farmers), processing, manufacturing, wholesaling, retailing and hospitality (as illustrated below).

Figure 2.1: Illustration of the basic food and drink supply chain



Supply chains evolve over time and the food and drink supply chain is no exception, with an increasing emphasis on efficiency within the chain in response to changing customer expectations and increasing competition.

One example of this is that farmers may seek to bypass traditional routes to the market by selling their produce directly to consumers via, for example, farmers' markets. Farm shops are another example of such direct selling.

Similarly, retailers may seek to deal directly with producers and effectively 'cut out the middleman' with a view to reducing production costs, thereby increasing profits and/or capturing a greater share of an increasingly competitive marketplace.

The 'farm to fork' supply chain in Wales (including retail) includes:

- 23,300 businesses
- £17.3 billion turnover
- 170,000 jobs

Source: Welsh Government

Definition of a Farmers' Market

The basic definition is a food market where farmers and producers bring their produce for sale directly to the public. There are rules for farmers' markets, usually including that bought-in food cannot be sold and that food should be from local producers, where "local" is determined by individual markets.

Farmers' markets are, however, not the only 'food markets' that exist. In the document [Guide to Food Markets in Ireland \(2014\)](#), Bord Bia (the Irish Food Board) identifies over 150 'food markets' in Ireland, which include:

- **Traditional farmers' markets:** selling only *farm-grown* and *added-value* products within a strict local radius. The grower/producer sells directly to the consumer.
- **Farmers' markets:** having a wider tolerance for the geographical radius, potentially allowing producers from anywhere to trade if they are *primary* or *secondary* producers.
- **Food markets:** including farmers and producers using locally sourced produce or produce sourced from abroad. The grower/producer sells directly to the consumer.
- **International food markets:** which can encompass all of the above and, additionally, resellers, i.e. stallholders who purchase food products from others and sell them on.

Farmers' markets have existed in the UK since September 1997 when the first market was set up in Bath.

On their website, the [National Association of Farmers' Markets \(FARMA\)](#) describes the main criteria for farmers' markets as being:

We grow it, we sell it. No wholesalers, no resellers.

The term is used fairly generally, leading to some concern that the 'brand' could be diluted or damaged in the eyes of consumers. Launched in 2002, Farmers' Market Certification is a scheme run by FARMA and inspected by an independent body which assesses member markets to ensure that they operate within guidelines for what FARMA considers makes a farmers' market the 'real thing'.

Interestingly, the guide also identifies some new and emerging models for food markets in Ireland, including:

- Urban lunch time pop-up markets with a focus on ‘food for now’;
- Mobile markets which move out of a permanent location to visit other towns and cities; and
- Collective markets where one stall sells food from several producers from a particular region.

It is also important to note that there are a number of other types of local food initiatives and models. Many, like farmers’ markets, also involve the selling of food directly from farmers to consumers, such as farm shops and farming co-operatives.

Another example is ‘community-supported agriculture’, where people band together and pay farmers a yearly sum in return for regular weekly or monthly deliveries of food and a say in how the farm is managed and what produce is grown.

Conclusion

The Welsh Government has set a clear strategic objective for the food and drink sector in Wales, which is to grow by 30 per cent by the year 2020. This provides a very clear objective or question against which intervention in the sector can be tested: Will the intervention contribute to a 30 per cent growth in the sector by 2020? Can farmers or food markets contribute to achieving that goal? This is a question that we will try to answer later in this report.

The traditional definition of farmers’ markets includes a focus on local producers and produce. Food markets are, however, continuing to evolve and a range of different types of markets now exist. The food and drink supply chain also continues to evolve, with a range of ‘direct sales’ approaches, beyond traditional farmers’ markets, now open to producers. This suggests that it would be wrong to focus the discussion only on farmers’ markets.

Key points

- Multiple attempts have been made to support farmers' markets in Wales via umbrella organisations.
- A change of approach in 2009 saw the Welsh Government invite ideas/applications from within the sector for projects which could be funded.
- This led to the Fork2Fork project being funded, with a large focus on raising consumer interest in direct sales.
- Support has, however, continued to be provided directly to a number of farmers'/food markets in some parts of Wales via locally delivered programmes.
- Support has also continued to be provided by the Welsh Government to food festivals in Wales.
- A number of projects and schemes are currently under development which could potentially provide support to food markets and direct sales over the coming years.

Grants and Umbrella Organisations

From 2000, the then-Welsh Development Agency (WDA)¹ offered 40 per cent grant support for the establishment of individual farmers' markets. A review of previous support initiatives within the evaluation of Fork2Fork (introduced later) by Miller Research states that the funding was, however, not allocated in a coordinated way². European State Aid regulations also prohibited support being given directly to individual markets, as remains the case today.

The alternative was to provide support via an umbrella organisation providing advice, support, marketing and promotion of groups of markets, and to provide training for the farmers taking part and the market organisers or managers. An attempt was made to do that in 2003 when the WDA supported the creation of [Farmers' Markets in Wales Ltd. \(FMIW\)](#). No further grant support was provided in subsequent years but FMIW has continued to operate as a website and online forum, which members can join for an annual subscription.

¹ The WDA was an executive agency (or quango) and later designated as an Assembly Sponsored Public Body (ASPB) for economic development. In April 2006 the WDA was abolished and its functions were transferred to the Welsh Government.

² Miller Research (2015) and stakeholder interviews for this research.

It has been reported that stakeholders were very mixed in their views on FMIW, with some acknowledging the usefulness of the site in identifying farmers' markets and others being critical of its failure to integrate with other initiatives or to be marketed widely.

A second attempt was initiated by the WDA in 2005 when FARMA sought to develop a regional initiative known as *FARMA Cymru*. As part of the initiative, grant support was available for the initial establishment and setting-up costs of any new structure or organisation. However, this approach was met with criticism from some existing market operations in Wales, who were ineligible for support from the organisation on the grounds that they were already established. It has been argued that the initiative was also possibly undermined by the organisational structure of FARMA and the animosity that arose from some stakeholders in Wales. No further Welsh Government funding was provided to the initiative after 2007.

It has been argued that, with the benefit of hindsight, a major factor undermining the initiatives discussed above was their failure to build sufficient capacity amongst key potential stakeholders whose support was needed. It has also been argued that the previous approach had been too narrow in its focus; offering support to farmers' markets is only one element of a wider agenda, and there is, it has been argued, a need for a more comprehensive approach that draws in more and different angles of direct food sales.

Rural Development Plan for Wales 2007-2013

Supply Chain Efficiencies Scheme

The arguments noted above led to a change of approach with the 2007-2013 Rural Development Plan for Wales (RDP), which focused on providing an opportunity, under the Welsh Government-managed Supply Chain Efficiencies Scheme, for proposals to be submitted from within the industry (as part of a competitive bidding process) for the creation of a new umbrella organisation to offer support to farmers and growers to develop outlets for direct sales, including, potentially, farmers' markets.

Around this time, a *Farmers' Markets Task and Finish Group* was established which aimed to look at what the different interested parties wanted out of an umbrella body and how they wanted such an organisation to work. One of the outcomes of their discussions was the creation of a *Direct Sales Steering Group* to oversee the funding period, which included representation from primary producers, market managers and coordinators, and consumers.

The approach generated three submissions, none of which were, however, considered by the Steering Group as being suitable to progress any further. Consequently, in January 2009, the emphasis was changed with applications being invited from a range of marketing organisations to plan and deliver an information and awareness campaign directed at primary producers, market organisers and the general consumer about the opportunities for direct sales across Wales, encompassing farmers' markets, box schemes, online sales, and farm shops. The intention was to help co-ordinate and unify food producers whilst stimulating consumer awareness and interest in buying directly.

In June 2009, following a second competitive bidding round process, Francis Balsom Associates Ltd. (FBA) was appointed to deliver "Real Food From Real People", a themed campaign subsequently branded as Fork2Fork.

Fork2Fork

This project began in November 2009 and was funded until September 2015. The intended outcomes of Fork2Fork were to increase public interest in direct food sales, a greater level of producer involvement in all aspects of direct sales and, ultimately, a higher value of direct sales activity within Wales. The producer element of the project was concerned with capacity building, up-skilling the sector on marketing techniques and direct sales opportunities, as well as assisting other projects targeted at building capacity in the sector.

The evaluation of the project found that one of the challenges that the project faced was securing stakeholder buy-in and managing expectations of producers, farmers' market organisers, and related organisations, despite a high level of scepticism about the prospects of another new project in this agenda area³. Stakeholders interviewed for the evaluation pointed to a number of factors that were likely to undermine the willingness of producers to engage with the project at the outset, including pessimism about the value of 'yet another new initiative', apathy and reticence towards extending product promotion, and conflicting priorities within the context of running a business. In light of these issues, it was decided early on in the Fork2Fork project that raising awareness amongst consumers and promoting direct sales opportunities would be the primary emphasis, though subsequent phases of the project saw more focus on support for producers (please refer to Appendix 2).

³ Ibid.

The conclusion of the evaluation was that most of the evidence of the achievements of Fork2Fork relates to its planning and delivery and that it is inappropriate and potentially misleading to apply any form of science to quantifying the impact of the finite campaign. Whilst impressive indicators of outputs were available (such as readership numbers, website visits, and digital platform participation), it was virtually impossible to determine with any certainty what the scale of the outcomes of each element had been. Taking this into account, it is also noted in the conclusion of the evaluation that the Fork2Fork project was seen by many stakeholders as the most successful direct sales promotion activity of its type to be undertaken to date.

Axes 3 and 4

Axis 3 (quality of life in rural areas and diversification of the rural economy) and Axis 4 (the LEADER approach: locally based approaches to rural development) were two elements of the 2007-2013 RDP. They were implemented on a Local Authority level with Partnerships and Local Action Groups (known as LAGs) set up in each participating local authority area to manage the programmes.

A very wide range of projects and activities were funded via Axes 3 and 4, including a number in the food sector. As part of the research for this report, the [Wales Rural Network Support Unit](#) asked LAGs to identify activities that had been undertaken which involved farmers' markets. The activities identified were focused on support for markets to set up and evolve, and included:

- A project in the Vale of Glamorgan working with the Vale Farmers Market (in partnership with the Cywain project⁴) to host a pilot 'Vale food arena' at the County Show. The pilot was considered a success and it is now an annual event;
- Support in Gwynedd to set up a Local Producer Market in Porthmadog (still active today) and, subsequently, to work with the producers to develop that market into a 'mobile market' which travelled to different locations within the county (Snowdonia Market); and
- Support from the Anglesey Local Action Group for the Anglesey Farmers Market.

Support for Food Festivals in Wales

There are clearly overlaps between farmers'/food markets and food festivals. The support that has been provided by the Welsh Government to food festivals needs to be taken into account in any discussion about food markets and direct selling by producers.

⁴ Cywain was another Supply Chain Efficiencies-funded project designed to help develop new products or markets for primary agricultural produce in Wales.

The Welsh Government has provided grant funding to Welsh food festivals for the past 14 years, with 25 festivals being supported in 2015. The latest evaluation of the grant scheme⁵ finds that Welsh Government funding, though having declined from previous years, continues to make an important contribution to the support of food festivals.

It is relevant to the discussion in this report that the evaluation found that there are some important differences between larger and small festivals which have perhaps become more pronounced in recent years, with larger festivals complementing their food offer with other entertainment forms (e.g. arts, crafts, performers). The organisers of larger events may describe their objectives in wider terms than the food and drink sector and may, for example, encompass the development of local culture, the economy, tourism, and community cohesiveness. Indeed, this is recognised by the Welsh Government by way of the fact that a tiered application approach was applied in 2015 for the first time, as opposed to the 'one size fits all' approach that was applied previously.

It is interesting to note that, as with farmers' markets, there have been various attempts to form an overarching body of some sort which would allow food festivals to benefit from both greater collaboration and greater influence. The latest such attempt was in 2014 when an *Association of Welsh Food Festivals* was proposed. However, as with previous attempts, this initiative has stalled.

One of the key reasons for this was that the appetite for formal collaboration seemed to vary somewhat across the festivals. For instance, one of the possible benefits of working together mentioned by advocates of the greater alliance concerns the efficiencies of joint purchasing. Whilst it seems feasible that there could be some financial gains to be made here, many festival organisers value their autonomy in this area. Festival organisers often have long-standing relationships with traders whom they trust, who know how to provide bespoke services for the festivals. In some cases, these local suppliers are central to the running of the festival, and may give considerable time and energy to making it a success. On a more strategic level, festival organisers are often very proud of their role in promoting local economic development and would wish to retain their ability to select local suppliers, even if marginal gains from joint purchasing were possible.

⁵ Wavehill (2016) (not published at the time of writing).

Projects and Schemes under Development

Some information was available about projects and initiatives under development at the time of writing this report, which may have some role in the support of farmers' and food markets.

The [Co-operation and Supply Chain Development Scheme](#) is part of the Welsh Government *Rural Communities – Rural Development Programme (RDP) 2014-2020*. It will provide support for a broad range of matters and for all aspects of a project, from the initial stages through to delivery and into dissemination and evaluation. The aim is to support the development of new products, practices, processes and technologies in the agriculture, forestry and food sectors, including short supply chains and local markets (including promotion activities in a local context). A wide range of projects that submitted an expression of interest in October 2015 have been selected to go forward to the full application, a number of which are relevant to issues being discussed in this report and briefly described in Appendix 4. A full list of the projects selected to go forward to the full application is available on the [Welsh Government website](#).

Twenty-two Local Action Groups (LAGs) across Wales are being funded as part of the new [LEADER programme](#), which is also part of the 2014-2020 RDP. These LAGs design and implement a Local Development Strategy for their area, developing a partnership approach to effect social and economic development. Those strategies have now been approved by the Welsh Government. No summary of the proposed activities was available at the time of writing but, based on previous activities by LAGs in Wales, it is likely that the local food sector and direct sales will be prominent within the strategies.

Also part of the 2014-2020 RDP, the [Rural Community Development Fund](#) offers grants which are primarily aimed at LEADER LAGs and other community-based organisations. The grants will provide investment funding for a wide range of activities to help meet local needs and strengthen communities so that they can grow and thrive. Again, at the time of writing, no details of any of the projects to be funded were available but the potential for funding for food markets is clear.

Conclusion

There have been multiple initiatives that have sought to support farmers' markets in Wales. The success (or otherwise) of these initiatives is unclear, although multiple attempts to establish an umbrella organisation for farmers' markets in Wales have not come to fruition.

A number of initiatives have been criticised for having been largely developed independently of farmers, growers, and market organisers, leading to a change towards an 'industry-led' approach, whereby projects were invited from within the sector. That approach has, however, not seemingly been a resounding success either, leading to a suggestion that there may be a lack of capacity or desire within the sector to cooperate and develop an initiative to support the sector. The risk of 'intervention fatigue' also needs to be taken into account. The question that this inevitably raised is whether there is any point in any further attempts to develop the sector in these ways.

The funding of Fork2Fork was a recognition that it was possible to support farmers' markets (and direct selling more generally) by seeking to stimulate demand from the public (i.e. consumers) for local produce and produce directly supplied by producers. Whilst the logic is clear, the case for or against such an approach has not been proven; the ultimate success of that initiative in respect of increasing the demand for local produce and produce directly from producers is very difficult to judge⁶. The recognition that there is a 'demand-side' approach to increasing direct sales, as well as the 'supply-side' approach, is, however, important.

The 'industry-led' approach is continuing for the current RDP programme (2014-2020), with a range of projects and programmes currently under development. The logic of such an approach is relatively clear: those working within a sector or area are best placed to understand what needs to be done. However, the experience of previous Structural Funds programmes in Wales is that there is a risk that such an approach can be difficult to coordinate and lead to a lack of a clear strategy⁷. Those overseeing the development of the food and drink sector in Wales need to be aware of those risks.

⁶ Ibid.

⁷ For example, the Guilford Review of Implementation Arrangements for 2014-2020 European Structural Funds Programmes in Wales (2013).



Neath Farmers' Market

Key points

- There is not a wealth of research on the benefits of farmers' markets, with much of the research focused on the USA.
- What research there is, however, is positive, identifying the economic, social and environmental benefits of farmers' markets.
- Common factors identified as things which make a farmers' market successful include a critical mass of producers, support from the local community, effective coordination, and effective marketing.

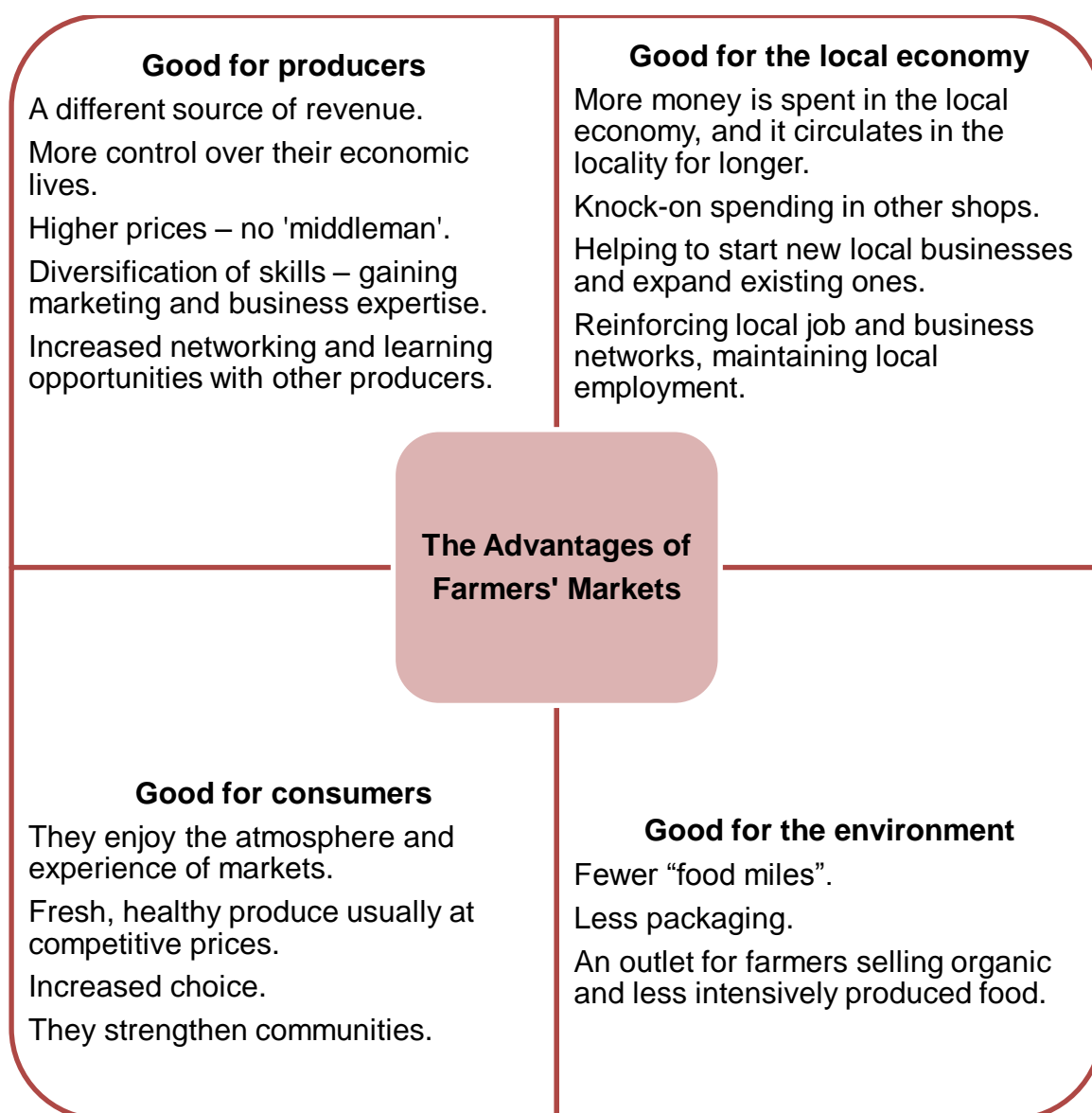
The Benefits of Farmers' Markets

Whilst there would not seem to be a substantial amount of research on the matter (many studies on farmers' markets in particular have been performed in the United States or Canada, where farmers' markets have a longer history than in the UK), it is something that has been addressed in a number of studies as reviewed in Appendix 4.

A report published by Friends of the Earth in 2000⁸ is particularly useful and draws upon a range of researches (mainly from the USA) to identify the advantages noted in the graphic below. These advantages/benefits are typical of those found by research (see Appendix 4). Whilst the research is largely focused on farmers' markets, the advantages and benefits identified are applicable to food markets in general, rather than just farmers' markets. They are also consistent with the interviews with market organisers and producers discussed in later chapters of this report.

⁸ Bullock (2000), p. 3.

Figure 4.1: The identified advantages of farmers' markets



Source: adapted from Bullock (2000)

It is apparent from the review that, although there may not be a wealth of research available, the evidence that is available is very positive in respect of the benefits that farmers' markets can generate. Importantly, those benefits also seem to be wide-ranging, including economic, social and environmental benefits. This potential to generate multiple benefits could be very advantageous to Government, as it provides an opportunity to contribute to the achievement of multiple objectives (economic, social and environmental) via a single intervention. As noted in Chapter 2, the Well-being of Future Generations (Wales) Act 2015 puts a responsibility on public sector organisations in Wales to consider a number of well-being goals and the principles of sustainable development within their activity.

What is unclear is whether the impact is clear or strong enough when combined or in any one of those areas to justify the intervention, especially when compared to the potential impact of alternative uses for the funding available.

Success Factors and Challenges

Research has also identified a number of factors that make a successful farmers' market (Figure 4.2) as well as a number of support needs (Figure 4.3).

Figure 4.2: What makes a successful farmers' market?



Source: adapted from a range of sources

Figure 4.3: Farmers' market support needs

Network	One-stop information service for farmers, information exchange
Marketing	Local food guides, advertising
Training	Manuals, training, workshops: (a) for farmers on marketing (b) for market managers on promotion and developing partnerships
Cost	Start-up costs, initial marketing
Regulations	Overcoming red tape, accreditation

Source: adapted from Bullock (2000)

These factors are consistently highlighted within the literature reviewed as part of this study (please refer to Appendix 4). The links to the issues discussed with market organisers and producers for this study are also, again, apparent.

It is also clear from the review that a substantial amount of knowledge and information is available regarding how to set up and maintain successful farmers' markets. This information is clearly potentially valuable to those involved with markets in Wales.

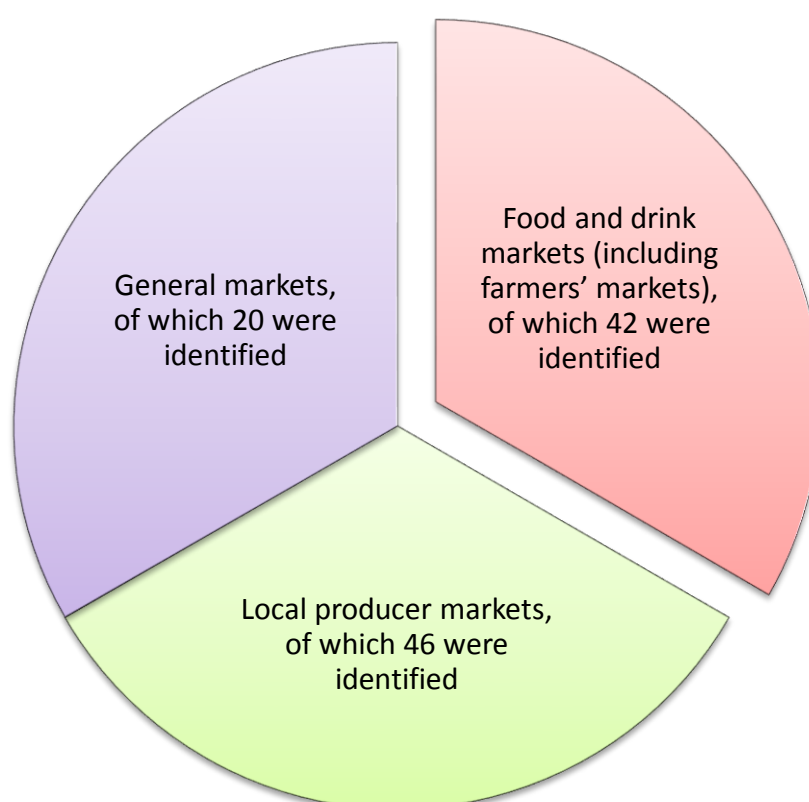
Prevalence in Wales

A key part of the research was to seek to estimate the number of markets in Wales. To do this, the research team:

- Consulted with online and published directories of markets; and
- Used 'web-scraping' techniques to identify markets, including using search terms such as "farmers' markets" and "food markets".

The focus was on markets which included food and drink within their offer. They did not, however, have to be specifically farmers' or food markets.

The research identified a total of 108 markets in Wales which can be split into three broad categories (as illustrated below):



Thirty-five of the food and drink markets identified themselves as 'farmers' markets'.

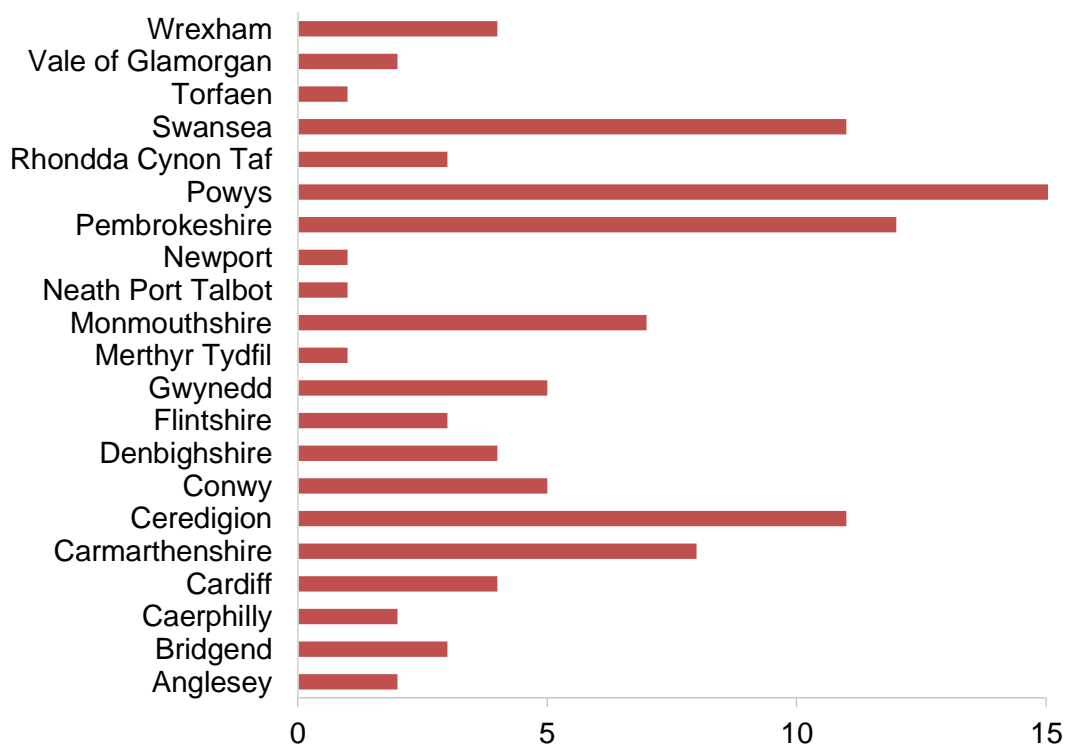
The figures quoted above should only be treated as an estimate of the number of markets that exist, as it is impossible to say whether any markets have been missed by the research. The fact that the 2007 FARMA report identified 40 farmers' markets in Wales can, however, give us some confidence in that estimate.

It is useful to note that 20 markets⁹ (16% of the original list of 128 markets identified) were identified as no longer trading during the telephone survey element of the research. This is an indication of the fact that some of the data which is available about markets in Wales is out of date.

For comparison, it has been estimated that there are some 750 food markets and farmers' markets across the UK¹⁰, whilst Bord Bia have estimated that there are 114 farmers' markets in Ireland.

The graph below shows the distribution of the markets per local authority area in Wales and suggests that, although markets are more prominent in some areas (Mid Wales in particular) they are to be found across Wales.

Figure 5.1: Distribution of the markets identified in Wales per local authority area



⁹ Fourteen food and drink markets (all describing themselves as farmers' markets), five local producer markets, and one general market.

¹⁰ www.localfoodadvisor.com – four of these are listed as being located in Wales.



Abergavenny Farmers' Market

Key points

- Telephone interviews were undertaken with 112 producers, 62 who attend farmers' markets and 50 who do not.
- Sales, whilst important, are only one of the factors considered when producers are deciding which market to attend. A perceived lack of profitability is, however, a key reason given by those who do not attend farmers' markets.
- The opportunity to have direct contact with customers and discuss their product with them is clearly important. Footfall is therefore a key factor for producers when deciding whether or not to attend a market.
- Location, particularly the locality of the producer, is also a key factor when deciding which markets to attend.
- Farmers' markets were perceived to have been important to the development of the business of the vast majority of producers attending markets. In most cases, sales at farmers' markets did not, however, represent the majority of the business' annual income, suggesting that having multiple sales routes is important.
- The most common way in which producers suggested that farmers' markets could be helped to develop in the future was via support of their marketing and promotion to the public.

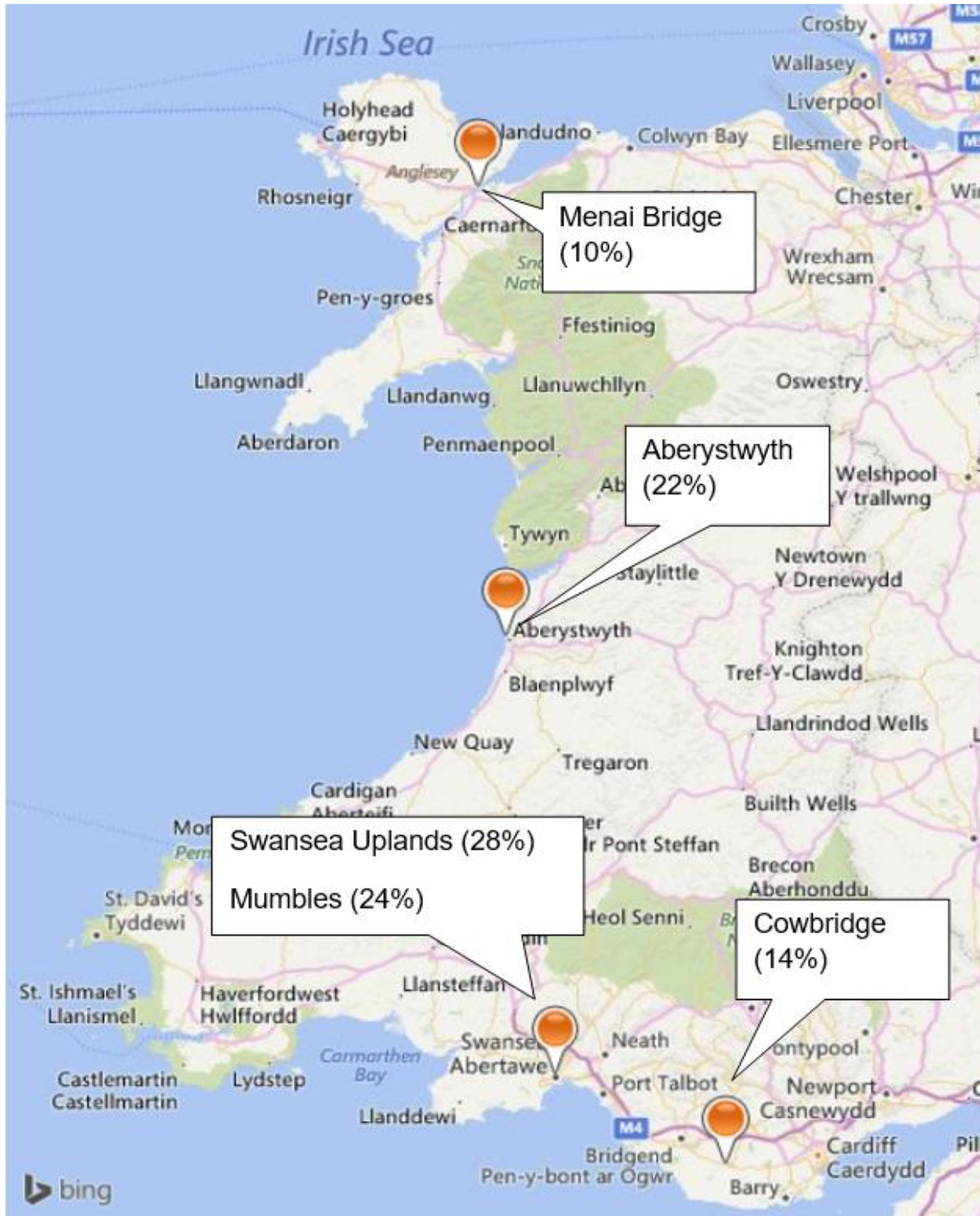
About the Sample

There is no comprehensive list of producers who attend farmers' and other food markets in Wales. The sample for these interviews was therefore derived from the survey of exhibitors at food festivals in Wales undertaken for the Welsh Government over the last three years, which included a question about whether or not the exhibitor in question also exhibited at farmers' markets in Wales. Those interviewed were then selected at random from those lists.

The information gathered is valuable and provides an insight into the perspective of producers. The nature of the sample does, however, need to be taken into account when considering the findings.

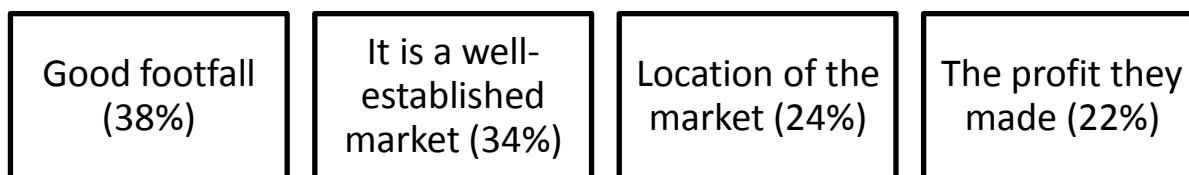
Why Producers Attend Farmers' Markets

Of the 62 respondents who said that they attended farmers' markets, 51 (82%) said that they had done so in the last 12 months. The markets which those respondents had most commonly attended in the last 12 months are shown in the map below.



Map source: Bing

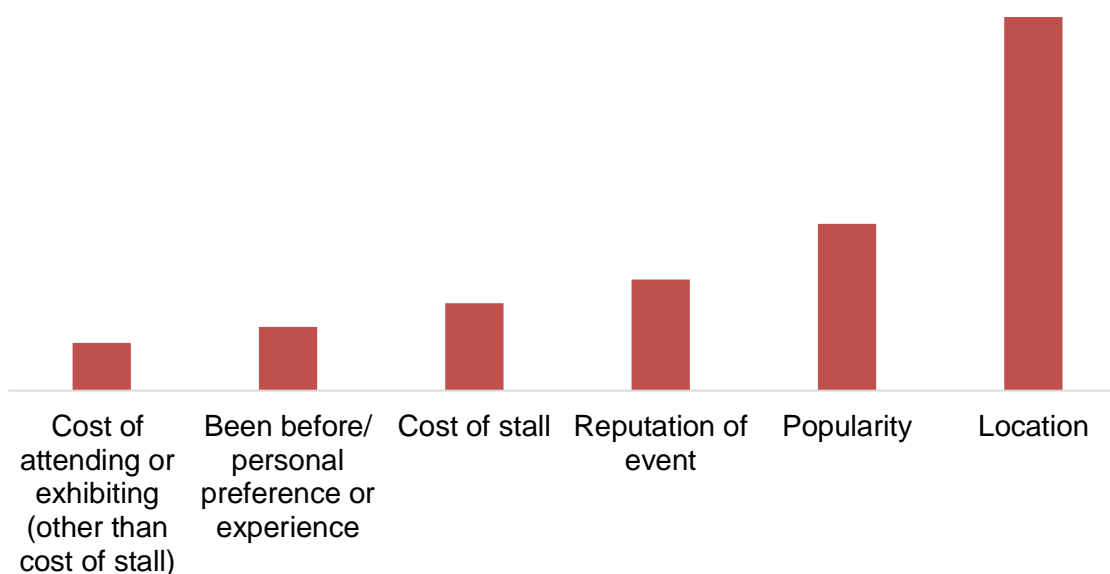
When asked to explain why some markets were more successful than others, the most common reasons given were:



The footfall, or numbers attending a market, is likely to be important to a producer for a number of reasons. The diversity of responses given is, however, the first of many indications within the data gathered that sales, whilst important, might not be the only key factor in respect of why producers attend a market.

When respondents were asked to identify which factors influence their choice of which markets to attend, the responses are slightly different, with location being far more prominent within the responses.

Figure 6.1: The factors that influenced respondents' choice of which markets to attend



N=62. NB: Only a response of 10% or higher is shown. Respondents could give multiple responses.

The location category included a number of sub-themes (as illustrated by the quotes below):

“All the farmers’ markets which we attend are local to us. It’s within our location, we have to keep the costs down, so these are our main reasons for attending.”

“Location, because of deliveries. I deliver down to Swansea and when the market’s on I coincide both. Also, I feel loyal to the customers as I’ve been doing the Mumbles one for 10 years and they’ve supported us.”

“It’s the location, there’s no point going any further than you have to with it. Given the costs and the freshness of the product too, fresh fruit and vegetables don’t travel well on long journeys.”

The suggestion is that the location — *particularly the locality of the base of the producer* — may trump the other considerations.

Why Producers Do Not Attend Farmers’ Markets

Those respondents who did not attend farmers’ markets (50) were asked to explain why. A wide range of responses were given but the most common was that it was not considered financially viable/there was insufficient footfall to make it attractive (14/50). Those respondents who had stopped attending markets in the last year gave the same reason.

Other common responses were as follows:

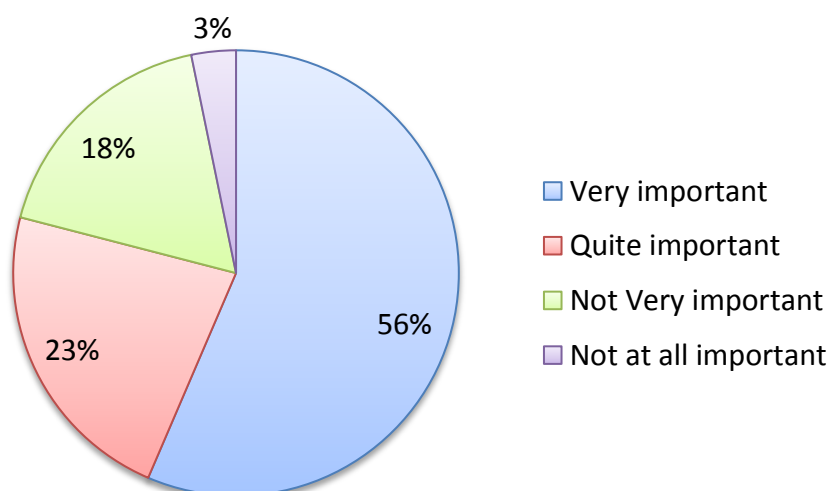
- They attend different types of food and drink shows and venues (13/50)
- They trade from their own shop/an alternative route to the market (10/50)

The nature of the sample, drawn from exhibitors at food festivals, needs to be taken into account when the comments made above are considered.

The Perceived Importance and Impact of Attending Farmers' Markets

Producers were asked to assess how important attending farmers' markets had been to the development of their business. As shown in the graph below, the response was very positive, with 79% identifying the markets as having been important.

Figure 6.3: Response to the question: How important has attending a farmers' market been to the development of your business?



N=62

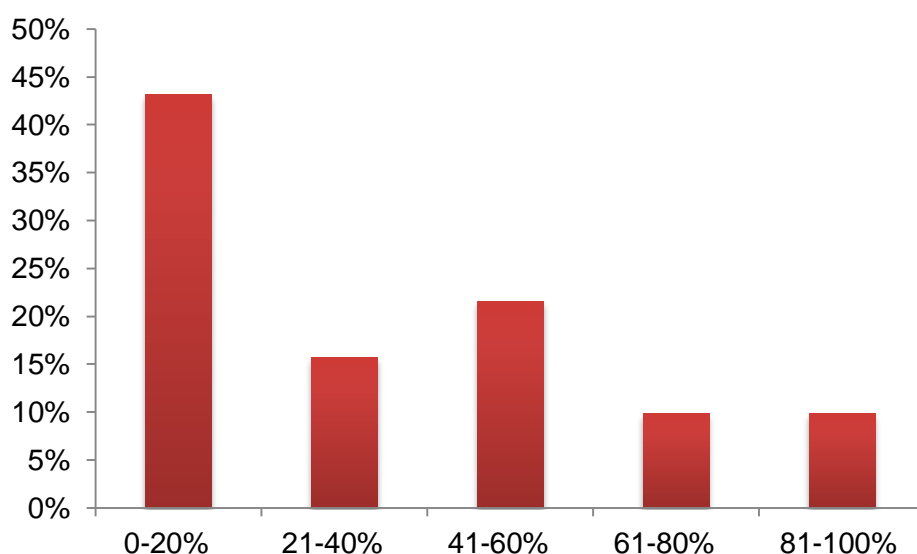
When asked to explain why, the most common reason given was the fact that attending allowed them to promote their product to the public (34%), again suggesting that sales on the day is not the primary reason why many producers attend markets.

Other responses included:

- Main/regular form of income (18%)
- Most clients/customers come from the markets (18%)
- To network with other producers (16%)
- To get feedback from customers (15%)
- For additional income (15%)

It is interesting to note that in the majority of cases, farmers' markets were estimated to account for less than 50% of the annual sales of the business (Figure 6.4), further supporting the premise that sales is not a primary motivator for attending the markets.

Figure 6.4: The approximate percentage of annual sales secured through farmers' markets (as estimated by respondents)



N=51

The benefit with which the majority of respondents agreed was that attending farmers' markets had influenced what they sell (Table 6.1). This is consistent with other responses within the survey which identify contact with customers as a key reason for attending markets.

Table 6.1: Response to the question: Has attending a farmers' market influenced any of the following with regard to your business?

	Yes	No	Not yet, but intend to
What you sell i.e. developed new products, new recipes, changed price of your goods etc.	59%	39%	2%
How you sell? I.e. changed the way you market your business or product, introduced deliveries etc.	33%	67%	0%
Where you sell? i.e. are you now selling in new geographical areas or online etc.	35%	61%	4%

N=51

Views on How Markets Should Be Supported

All respondents (those who did and did not attend farmers' markets) were asked to comment on what Welsh Government could do to assist farmers' markets in the future. Importantly, they were asked to bear in mind the ongoing reductions in Government budgets and put financial assistance aside when responding.

A very wide range of suggestions were made. But the most common response (by some distance) was to support the promotion/marketing of the markets (46% of the whole sample and 60% of those who attend farmers' markets).

The other common suggestions were as follows:

- Reduce/subsidise the cost of stands (16%)
- Improve the locations where markets are held – access to electricity, access to parking, weatherproofing, etc. (12%)
- Mentoring support for small producers (9%)
- More guidance for organisers (8%)

Respondents were also asked to comment on what the industry could do to improve the sustainability of farmers' markets. Focusing in this instance only on those who said that they attended farmers' markets, the most common response was, again, to improve the promotion of the markets (32%). The other most frequent responses were as follows:

- Producers should keep attending and supporting the markets (26%)
- Ensure that the markets cater to the needs of consumers (19%)

A lack of views on the matter was, however, apparent, with one in four producers who had attended markets in the last 12 months unable (or unwilling) to offer any suggestions.

Conclusion

Perhaps the key finding of this chapter is that producers who attend farmers'/food markets perceive them as having been very important in the development of their business. Sales and profit, whilst important, are not, however, the main reasons why producers value the markets: having contact with customers and the opportunity to discuss their product with them would seem to be at least as important if not more so. Footfall in the market is therefore understandably a key factor for producers. Location, especially in respect of distance from the base of the producer, is, however, also very important.

Although it is not an issue that has been possible to explore in this research, it would seem likely that there is a correlation between footfall and a farmers' market (or any other event) and locality of the base of the producer. The farther the market, the more assurance the producer is likely to need about the footfall to expect at the event. The closer the event, the more likely that other factors such as loyalty to the market or the customers who attend on a regular basis come into account.

The View of Market Organisers

Key points

- Telephone interviews were undertaken with 60 individuals responsible for markets with food within their offer in Wales.
- A range of different types of people and organisations are involved in managing markets in Wales; it is far from a homogenous group. This has implications in respect of how the groups could be engaged and supported.
- A large proportion of those interviewed had been involved with their market for a considerable number of years, suggesting that there is extensive experience within the group.
- A relatively large proportion of markets within the sample (30%) had received a grant to support their establishment.
- Only a very small proportion of respondents said that their market was currently receiving any kind of support, financial or otherwise.
- The vast majority of respondents said that their market was, to some extent, financially viable/sustainable.
- The key ingredient considered to underpin the success of a market was being able to provide a variety of high-quality, local produce.
- Increasing footfall and competition from supermarkets were considered to be the key challenges facing markets.
- Promotion and advertising of the market were the most commonly identified support needs.
- There was no clear or strong desire for cooperation amongst the markets.

The Sample

The population for this sample was the list of markets in Wales (as set out in Chapter 5) where contact details could be identified. No sample was drawn from the list; the research team attempted to contact all of those on the list by telephone. This generated 60 interviews, although the number of markets represented within the sample was higher due to the fact that 14 of the interviewees had responsibility for multiple markets.

In respect of the three types of markets introduced in Chapter 5, the number of interviews breaks down as follows:

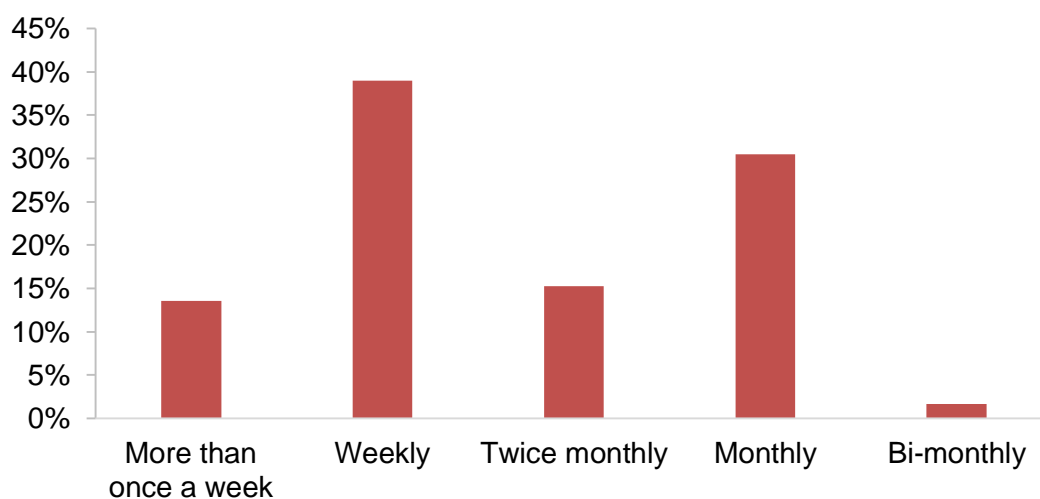
- 22 food and drink markets (37%)
- 27 local produce markets (45%)
- 11 general markets (18%)

The sample is intentionally broader than just farmers' or food markets to reflect the fact that food is part of the offer at a range of different types of markets, not just food or farmers' markets. All of the markets within the sample did, however, have food prominent within the publicity for their market.

Respondents were asked to estimate how many stallholders attend a typical market event. It ranged from just three to 100, which provides an indication of the diversity of the markets. The average (mean) number quoted was 20, although the median was lower (15), indicating that the mean is skewed by the few larger markets.

Respondents were also asked to estimate the number of people who typically attend one of their markets. In many instances, respondents had difficulty providing a response, noting that there was no method for counting the number of attendees because, for example, it was a street market and, therefore, difficult to estimate the amount of passing trade. The number provided is therefore not considered reliable. Figure 7.1 shows the frequency of the markets within the sample.

Figure 7.1: The frequency of markets (as reported by respondents)



N=59 (one non-response)

Responsibility for the Market

The roles that the interviewees described themselves as having vary considerably and included:

- Local Authority-employed market managers
- Town Council employees
- Volunteers working as individuals
- Volunteers working as part of a committee
- Directors or other representatives of groups of producers set up to run markets
- Employees of a company or social enterprise set up to manage the market

This is an indication of the diverse group of people and organisations operating markets in Wales; it is not a homogenous group, with some undertaking the role on what could be described as a professional basis (they are paid to do it) and others undertaking their role as volunteers. This is an important characteristic of ‘the sector’ which needs to be taken into account when its potential development and possible interventions are being discussed.

Eighty-seven per cent (52/60) of respondents said that there was a specified individual identified as the manager or coordinator of the market. In 33 of those cases, the individual in question was described as working on a voluntary basis, with the others being employed by:

- Public sector (13)
- Private sector (5)
- Third sector (1)

When respondents were asked to estimate how long they had been involved with the market, 45% said that they had been involved for over 10 years (Table 7.1). There is therefore a considerable body of experience within the group which could potentially be utilised as part of any initiative to grow the sector in Wales.

Table 7.1: The length of time for which respondents estimated they had been involved with the market(s) being discussed.

	N	%
Less than a year	3	5%
1 to 2 years	8	13%
3 to 5 years	13	22%
6 to 10 years	9	15%
Over 10 years	27	45%
Grand Total	60	100%

How Markets Became Established

Thirty per cent (18/60) of respondents identified grants as having been received to set up the market. They included grants from the WDA, Local Authorities, Town Councils, Snowdonia National Park Authority, and European funding (RDP). The grants were used to purchase equipment and also to market and promote the market.

It is interesting to note the reference in some instances to grant schemes which existed a number of years ago, particularly the WDA grant. This suggests that the benefit of those grants (in respect of setting up a market) is still ongoing at least in some instances.

Three respondents reported that support (over and above simply funding) has been provided by a LEADER Local Action Group in the form of, to paraphrase, 'help to get things going'. Essentially, this would have involved a project officer bringing stakeholders or groups of producers together, finding a venue for the market, and so on.

Nine respondents said that no funding had been received when setting up the market. It is not possible to assess whether this had any ongoing impact (positive or negative) on those markets.

Thirteen respondents made reference to Country Markets¹¹ as being part of their setting-up, a number also noting that the market was originally set up by the Women's Institute (WI).

Support Currently Being Received

Only one respondent identified any financial support or sponsorship currently being received; 98% (59/60) of respondents said that their market did not do so.

The majority (80%, 48/60) of respondents also said that their market was not receiving any non-financial support. Where support was identified, it was:

- From Country Markets (x 4)
- Promotion and marketing support by the Local Authority (x 2)
- From the host organisation's business support unit, providing support to traders
- The lending of things like a noticeboard and banners for marketing purposes from the local LEADER group

¹¹ Country Markets is a co-operative social enterprise which is organised into local Co-operative Societies: <http://www.country-markets.co.uk/about-us>.

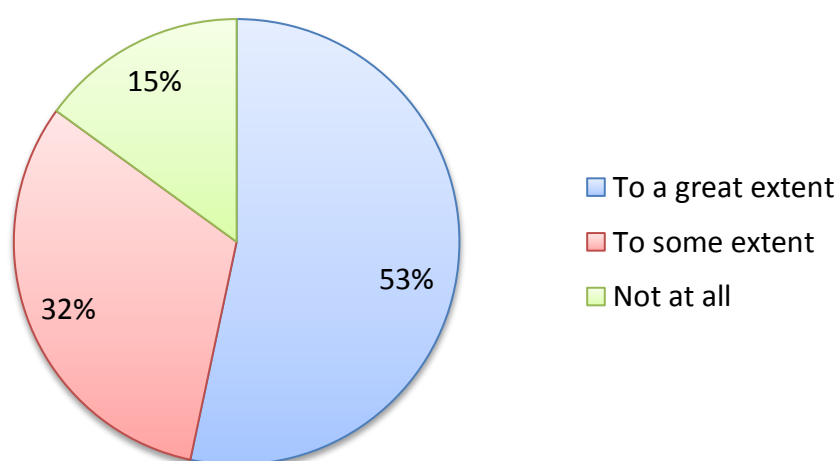
- Training paid for by the NFU as part of their insurance
- Practical support from the manager of the centre where the market is located
- The National Market Traders Federation magazine – ‘The Market Times’ did a piece about the market
- Free publicity – the local press tend to advertise on our behalf, as do little local journals. Swansea Council also has an officer who publishes a weekly newsletter of events and always inculcates the market.
- Free use of facilities by the Local Authority

It is important to distinguish this from the support which is provided when the public sector employs a market coordinator or manager, which, as noted previously, was the case in 13 instances within the group interviewed.

The Perceived Financial Viability of Markets

When asked to comment on the financial viability of their market, 53% said that, to a great extent, it was viable, with only 15% giving a negative response, suggesting a high degree of confidence in the future amongst the group. ‘Self-sufficiency’ and maintaining ‘low costs’ were prominent points amongst the comments of those respondents who were most confident about the financial viability of their market.

Figure 7.2: Response to the question: To what extent would you describe your market as financially viable/sustainable?



N=60

Care is required when breaking down a relatively small sample into sub-groups, as there is a risk that the number of responses being examined becomes too small. It is, nevertheless, an interesting look at sub-sets of the sample.

If we look at just the food and drink markets within the sample (n=22) the pattern is actually very similar to that for the sample as a whole, with 55% describing their market as being, to a great extent, financially viable and 14% describing it as not at all viable.

If we just look at the local produce markets (n=27) there is slightly less confidence, with 44% describing their market as being, to a great extent, financially viable and 19% describing it as not at all viable. The general markets (n=11) were the most confident sub-group, with 73% describing their market as being, to a great extent, financially viable.

Perceived Success Factors and Challenges

When respondents were asked to identify what they would describe as the key ingredients that underpin a successful market, the three most common responses involved the produce being sold at the market. Indeed, the three factors in question can be combined into a need for **a variety of high-quality, local produce**.

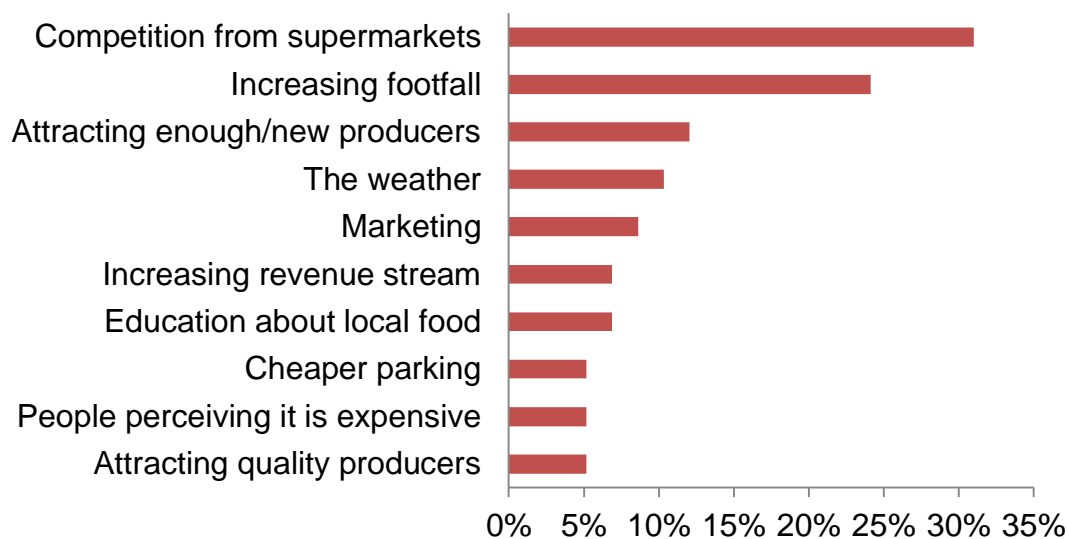
Figure 7.3: The key ingredients that underpin a successful market (as identified by respondents)



N=60

Two issues stand out when looking at the key challenges identified by respondents. Both are, however, effectively the same issue: the need to ensure that enough customers visit the market, rather than the competition, i.e. the need to promote the market.

Figure 7.4: The key challenges that face markets (as identified by respondents)

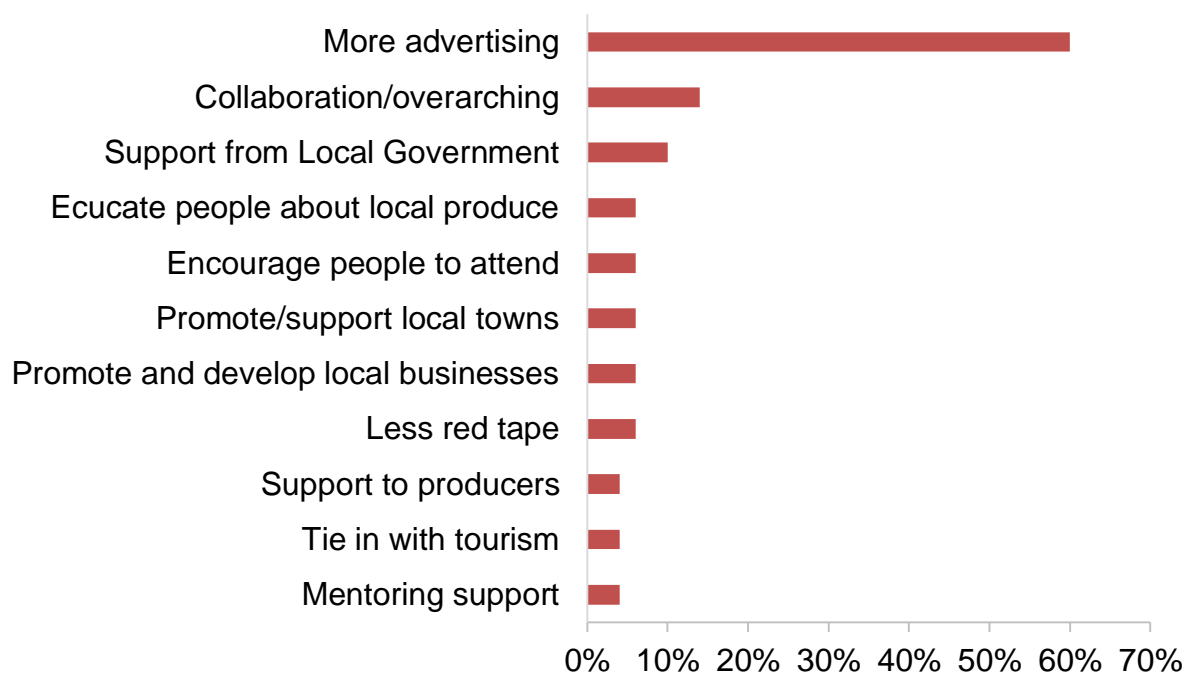


N=60

Future Support Needs

When respondents were asked to suggest ways (other than financial) in which they felt the Welsh Government could support markets, advertising was, by far, the most common response.

Figure 7.5: Non-financial ways in which respondents suggested the Welsh Government could support the development of markets

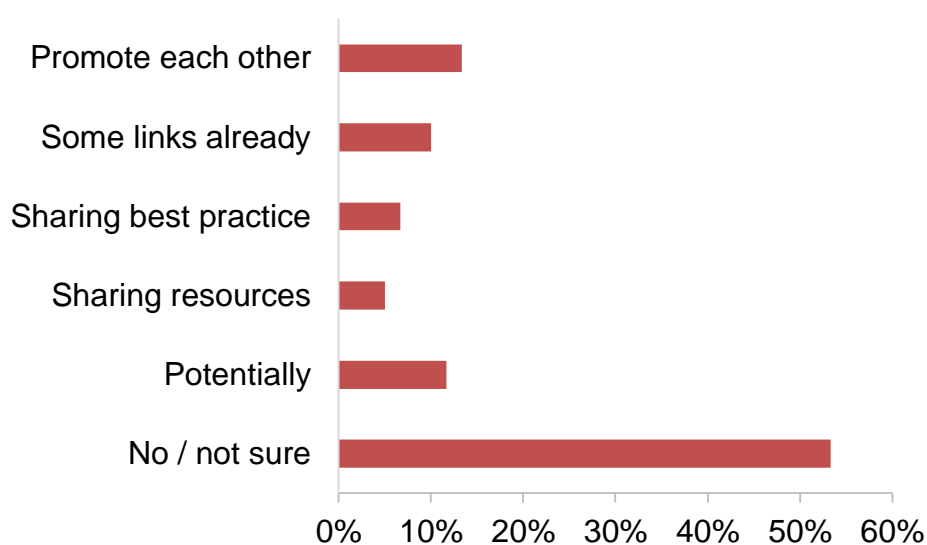


N=60

This question was followed up by asking for suggestions about what else could be done (i.e. not just by the Welsh Government) to support markets. Advertising and promotion was again the most common response (36%), followed by providing financial support to markets/producers (27%) and promoting business start-ups (11%).

Respondents were also asked to consider whether there were any ways in which markets could potentially work together. The response was mixed, with approximately half identifying some potential, and making some suggestions, and half saying 'no' or 'not sure'. It is, however, clear that there is no strong desire to explore collaboration. When this is considered in the context of the previous attempts to set up an umbrella organisation for farmers' markets in Wales and develop a project from within the sector, it may suggest that setting up a collaborative project within the sector in the immediate future may be challenging.

Figure 7.6: Response to the question: Are there any ways in which markets might benefit from working together?



Conclusion

Many of the findings discussed in this chapter are consistent with those in Chapter 3, where the literature about farmers' markets is discussed, especially in respect of the key ingredients for a successful market, most notably the need to be able to provide a range of high-quality, local produce.

Most respondents described their market as being financially sustainable. Most also said that they were receiving little (if any) support, financial or otherwise. This could be interpreted as suggesting that there is no need for any kind of intervention. This may be the case if the objective is to simply maintain the status quo. Intervention may, however, be necessary in order to support the markets to develop and to maximise their potential impact on the food and drink sector and the local area more generally, as discussed further in the concluding chapter of the report.

Promotion and advertising of the market were the most commonly identified support needs, which is consistent with what the producers were saying (as discussed in the previous chapter).

The range of individuals and organisations involved in the sector is interesting, as it is likely to mean that any intervention in the sector could be more complicated than may be apparent at first glance. The lack of any strong desire for cooperation within the sector would suggest the same.

Conclusions

This final chapter draws together the findings of the research to consider a number of key questions, beginning with whether or not farmers'/food markets should be supported by the 'Government', used here in its broadest sense and therefore including local as well as central Government in Wales.

Should Farmers'/Food Markets Be Supported?

Decisions made by Government about the interventions that they carry out, or the support that they provide, should be outcome-driven. Farmers' markets should not therefore be supported simply for the sake of it.

As discussed in Chapter 2, the Welsh Government has set a clear strategic objective for the food and drink sector in Wales to grow the value of the sector by 30 per cent (to a turnover of £7 billion) by the year 2020. The action plan put in place to achieve that objective sets out a number of key actions that will be implemented, including (under 'business growth and market development') more support towards supply chain efficiency (action 22), helping food businesses to overcome problems and costs associated with accessing the marketplace (action 23), and support for events which raise the profile of the Welsh food and drink sector.

So, can supporting farmers'/food markets help to deliver those actions and achieve the strategic objective? The simple answer to that question is 'yes'. It probably can by helping the businesses that exhibit at the events to grow.

Whilst the evidence is not as strong as one may wish it to be, the literature reviewed within this report and the interviews with producers do suggest that they benefit as a result of participating in markets. The fact that the direct economic impact is unlikely to be substantial needs to be taken into account; the businesses in question are more often than not going to be micro-businesses and the level of sales at a market is unlikely to be substantial. As discussed at various points in this report, turnover (or sales) is, however, not the only benefit to producers who attend markets; there is also a substantial 'market research' benefit which comes from direct contact with customers at a market.

The benefits to a business are summed up nicely in the quote below, made by Paul Roberts, Business Development Manager at the Food Technology Centre, Llangefnï.

For our clients the farmers' market is potentially the first stepping stone in the interaction with consumers. They will obtain honest feedback on taste, texture, packaging, etc., as this means of selling literally opens other doors for clients. For example, delis, cafes, restaurants, etc. would approach them to stock their products.

In terms of NPD [new product development] we assist many to start off at the farmers' market/regional food shows, so as they act as feedback for any new products they are launching. Feedback like this is invaluable and ultimately costs thousands if you were to take it through a researcher, etc.

Many of our clients have started their life in farmers' markets; for example, a business who is now supplying pubs and wholesale has now strategically pulled away from the markets once other opportunities are available. However, others who now have a truly recognisable brand choose to stay at the farmers' market, so it keeps in line with their core values in working in the community, food miles, etc.

The positive spillover benefits generated by markets, whilst not the primary consideration here, should also not be ignored, especially in light of the change in approach required with the introduction of the Well-being of Future Generations Act. These spillover benefits would include the social benefit that markets can generate within the local community and the contribution that a market can potentially make to the regeneration of town centres by drawing people into the area.

We are of the view that there is a strong argument that the focus for the Welsh Government's Food Division should be on supporting the development of 'direct sales' by producers, rather than exclusively on sales via farmers' or any other types of markets.

This should not be read as a recommendation that markets should not be supported; markets are likely to have an important role to play, especially in respect of the direct contact between producers and consumers that they facilitate. A focus purely on farmers' markets would, however, not seem appropriate, given the way in which the sector is continuing to evolve.

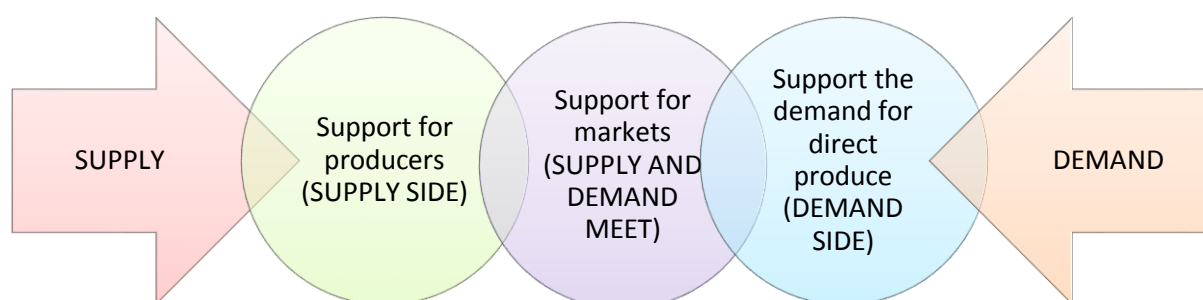
The primary objective should, we would argue, however, be to develop food businesses and increase the level of direct sales by producers, thereby contributing to the strategic objective of growing the sector by 30 per cent by 2020.

How Could Food Markets Be Supported?

This is not as straightforward a question as it may seem. In fact, for the reasons discussed above, we would argue that it is probably the wrong question to be asking; the question should be as follows: How can direct sales by producers be increased? Food markets would be one of the potential tools for achieving that objective. We would also note that supporting food markets does not necessarily mean providing support directly to the markets.

We foresee three very broad areas or points where intervention could potentially take place, as illustrated by the graphic below.

Figure 8.1: Points in the supply chain at which intervention could take place for the benefit of farmers'/food markets



The graphic is intended to illustrate the basic supply chain within which food markets operate. On the supply side are the producers who sell their products at the market. On the demand side are the consumers (or customers) who visit the market and purchase the produce. The market sits in the middle, bringing the supply and demand sides together, giving producers an opportunity to sell their produce and the consumers an opportunity to buy it.

Intervention could take place at any one of those points, or at all three. To operate effectively, a 'market'¹² needs both supply and demand. Increasing the demand for a product is pointless unless there is an adequate supply of that product. Similarly, increasing the supply of a product is pointless unless there is a demand for it. There also needs to be a mechanism via which the supply can meet the demand. Farmers' and other food markets are one of those mechanisms.

¹² Here, we are referring to a market as it is referred to in economic terms: a system whereby parties engage in exchange.

An intervention should take place at the point where a market is failing or operating inefficiently. Are we in a situation where there is demand for the product but a lack of supply? Or, are we in a situation where there is adequate supply but no demand? Or is it the case that there is both supply and demand but no effective mechanism for allowing the transaction to take place? These questions are beyond the remit of this study. They do, however, need to be considered as part of any discussion about how direct sales by producers can be increased and any role which farmers' or food markets may have.

The following outlines some of the issues that would need to be considered when discussing where best to provide support.

Support producers directly (supply side)

Supporting producers to increase their levels of direct sales would have a number of benefits, including the fact that support is going directly to those businesses that need to grow to achieve the strategic objective for the sector. Markets would, however, also benefit as the number of producers available to exhibit at the market increases. There should also be a benefit in respect of the quality of the produce being sold at the markets.

The downside of this approach is that providing support directly to producers could be expensive to administer (in respect of the volume of potential beneficiaries). However, a number of schemes already exist which could be delivery vehicles for any support, including Farming Connect, Business Wales, Business Investment Scheme, and Food Innovation Wales.

Provide support to markets (bringing supply and demand together)

Supporting markets directly would, obviously, benefit the markets receiving that support. Those producers who exhibit at the markets supported would, however, also benefit, especially if the support led to an increase in footfall at the events. The benefit to producers would, however, be limited to those who exhibit at the markets in question, which is a downside of this approach. Such an approach is, however, likely to be less expensive to administer than a scheme to support producers (due to the smaller number of beneficiaries). Supporting markets would also potentially generate economic, social and environmental spillover benefits within the local area (as discussed within this report).

A range of support could potentially be provided to markets. The steer from this research is, however, very clearly that the focus should be on support to market and promote the event.

Increase the demand for Welsh/local produce/direct purchasing from producers (demand side)

Both producers and markets should benefit from an increase in the demand for Welsh food and drink, local produce, and produce supplied directly by producers. One of the key findings of the evaluation of the Fork2Fork project is, however, that making a judgement on the effectiveness of any such initiative is very difficult.

What Should Happen Now?

Our hope is that this report will stimulate further discussion both within the Welsh Government and within the sector more generally. We would suggest that the discussion should, if possible, bring together the various stakeholders in Wales and, to this end, the potential to reconvene the group previously set up in the early stages of the 2007-2013 RDP to consider the development of direct sales should be considered.

The situation is, however, not static, with projects and schemes already in development. As discussed in Chapter 3, the risk is that these developments take place outside the more general and strategic discussion about how best to develop the sector, and that there is thus a lack of strategy and coordination amongst the initiatives funded. Accordingly, it is recommended that the issues identified in this report be taken into account when the potential to fund the new projects and schemes is being considered, and that the need for a strategic approach be also taken into account.

Source: <http://www.farma.org.uk/certification-farmers-market/>

1. Locally produced

To reach FARMA standards, your market must define an area as local, from within which the majority of your producers will travel to sell at your market. The area that you define as local is important for public perception of 'local food'.

There are two types of local definitions that FARMA recognises:

- Local as a radius: Local is defined as a radius from the market. A definition of 30 miles is ideal, and up to 50 miles is acceptable for larger cities and coastal or remote towns and villages.
- Local as a county boundary: The definition of local may also be a county boundary or other geographic boundary, such as a National Park that is similar in size to the radius option.

Difficult to source produce: Producers from further afield may attend the market if there is no suitable local producer of a given product. Markets that accept producers from beyond their definition of local should include a clause that states that "preference will be given to the most local producer when a space becomes available at the market, without compromising quality".

Maximum distance: If producers from beyond the area you define as local are permitted to attend your market(s), it is recommended that a maximum distance of 100 miles of the market be stated.

2. Principal producer

The stall should be operated by someone directly involved in production, not just in other aspects of the producer's business. One of the key principles of a farmers' market is for the consumer to have a direct relationship with the producer.

Community associations such as local allotment societies or Country Market groups may be agreed as principal producers on a case-by-case basis by the local market. In all cases they must be bona fide producers; if in doubt, contact the FARMA office.

3. Primary, own produce

Primary produce will have been grown or reared on the producer's land. For livestock and plants this means being grown or finished (having spent at least 50% of its life) on the producer's land. Preference should be given to the largest percentage of a product's lifecycle spent on the producer's land.

Game shot or caught within the defined local area may be sold at farmers' markets by the person rearing or licensed to hunt the game.

Fish at a farmers' market, ideally, should be sold by the fisherman. A representative of a number of known local boats may attend the market as long as the fishing grounds are known local, inshore waters and a link to the fishing business(es) can be proven.

4. Secondary, own produce

Anyone processing produce or adding value is a secondary producer. For processed products the base product should be substantially altered and they must contain as many local ingredients as possible — this means being grown or reared within the area that the market defines as local. Receipts should be kept as proof of origin for inspection by the market manager and Trading Standards when requested; producers growing their own should be prepared to be visited by an appointed representative from the market management.

Processors, who want to benefit from the success of farmers' markets, which is partly built on the localness of the food on offer, should be prepared to abide by similar principles.

5. Policy and information

A farmers' market should be clearly labelled as such and separate from any other retail operation, especially other market stalls that will confuse customers' perception of what a farmers' market is. Each farmers' market should be operated in accordance with Trading Standards, Environmental Health, alcohol licensing, market charters, and other relevant legislation.

The policy of each farmers' market in terms of sourcing locally produced food and encouraging sustainable methods of production should be available to customers. Producers must produce clear written information about production methods, which shall be available to any consumer who requests it. The market must also publicise the availability of this information.

Markets should, for the time being, include a policy that no genetically modified organisms are knowingly sold or included in products sold at the market. Markets may establish other standards which they feel are appropriate, e.g. restricting the use of ingredients perceived as undesirable by consumers, compliance with minimum animal welfare standards, etc.

6. Other criteria

Markets may set other rules which do not conflict with the main principles set out in the criteria. The prime aim of the market must be to develop a vibrant environment where consumers and producers are brought together and the farmers' market principles are promoted and upheld. Example rules are available from the FARMA office.

Appendix 2: Summary of Phases of the Fork2Fork Initiative

Source: *Miller Research (2015)*

The Fork2Fork initiative was delivered against the following set of key measurements agreed with the Welsh Government:

Phase 1 (November 2009 to September 2011)

Consumer advertising:

- Production and positioning of advertising in key print press media over the project period to reinforce the key project objectives.

Consumer press and media campaign:

- Launching and implementing a competition allowing for regular case studies of direct food sales producers in at least two daily newspapers in 2010; and
- Launching a generic sign-up campaign element to encourage organisations and consumer endorsement for direct sales.

Events presence:

- RWAS Winter Fair 2009 for project launch with Welsh Ministerial support;
- Presence at the National Eisteddfod 2010;
- Presence at a number of agricultural shows in Wales; and
- Presence at a selection of consumer events in Wales.

Newsletters/news bulletins:

- Production of regular bulletins for producers, covering activity by the project team and wider sectoral issues; and
- Production of a seasonal consumer newsletter covering Winter 2009, Spring 2010, Summer 2010, Autumn 2010, Winter 2010, Spring 2011, and Summer 2011.

Website:

- Production of an e-portal for consumers and producers, delivering the following core tasks:
- Promoting to consumers the benefits of direct sales;
- Promoting to consumers case studies of producers; and
- Providing a login section for producers and other stakeholders in order to provide them with resources and key sectoral information.

Direct Sales Conference:

- Organisation of Direct Sales National Conferences;
- Engagement with stakeholders; and
- Reporting to the Direct Sales Steering Group at least three times over the project period (or as requested).

Phase 2 (October 2011 to June 2014)

Following the end of Phase 1 activity and outcome reports, additional funding was sought to maintain some level of support for the sector. Accordingly, it was agreed to provide some low-level stakeholder engagement together with maintenance of the Fork2Fork website. During this period the F2F team also undertook a review and plan for a potential transition phase ahead of the Rural Development Plan 2014-20.

Phase 3 (July 2014 to September 2015)

Key outputs of Phase 3 were to maximise and add value to the capacity-building activity and assets from the previous Phases 1/2 and to create a self-sustaining Fork2Fork legacy facility. The three main areas identified to achieve this were:

- *Fork2Fork.Wales* – the creation of a new sustainable digital platform and interactive facility based on innovative, advanced technology to provide a world-first, self-content-generating/updating platform that would be:
 - Producer-focused – to allow postings by the primary producer of blogs, recipes, and events. Also, to include a comprehensive database and directory of producers and case studies, plus information and events related to producer and direct sales skills.
 - Consumer-focused – online portal for consumers to be updated on the latest food and drink industry news stories, recipes, food events, and festivals.
 - Food Festivals microsite – previous attempts amongst stakeholders had failed to develop a sustainable focal point for food events. Therefore, after consultation with Welsh Government and key food festival organisers, a new Food Festivals microsite (www.foodfestivals.wales) was created as part of the F2F digital platform and to integrate it into the events section.

- *Fork2Fork Local Food Journeys Publication* – to promote and celebrate the success of the Fork2Fork project and to feature ‘best in class’ case studies generated over the course of the project. To provide a legacy document, repurpose all content on the website, and use in other publications for wider audiences. Also, to increase consumer awareness and use of the newly created digital platform. The publication was aimed at tourists visiting Wales, as well as local people, producers, and food event organisers. The publication aimed to reinforce the messages of the Welsh Government in the particular area of food tourism, food festivals, and increasing food business innovation and growth.
- *Food Innovation Wales* – creation of an overarching brand for the Food Centres in Wales in order to encourage a one-stop shop for primary producers and direct sales operators to innovate and up-skill themselves in the future. This included identifying possible primary producers suitable for larger growth and promotion of related projects, such as the KITE project¹³. In particular, this stream sought to lay the foundation of an integrated approach for primary producers in preparation for the next round of RDP funding.

¹³ The Knowledge Innovation Technology Exchange Project facilitated a proactive partnership between SME food businesses, affiliates (graduates/individuals with industry experience), and Welsh Food Centres (Zero2Five Food Industry Centre, Cardiff Metropolitan University, and Food Technology Centre, Coleg Menai).

Appendix 3: Projects under Development

Source: [Welsh Government](#)

- *Wales food tourism co-operation + supply chain development (Four Cymru FBA Ltd.):* To establish co-operation and collaboration amongst disparate providers of food tourism 'products' and services in Wales (including food festivals, food events, and farm shops). Funding is required to build capacity, create new clusters/networks, share best practice, and inspire better and new activities within a dynamic, all-Wales food tourism action plan.
- *Cywain (Menter a Busnes):* A supply chain collaboration model that will provide targeted support to micro- and SME businesses operating in the Welsh food and drink sector. Support provision will be trialled to develop capacity and capability, facilitate knowledge transfer and industry intelligence, and strengthen supply chain integration.
- *Tyfu Fyny (Growing Up) (Federation of City Farms and Community Gardens):* A project to develop a vibrant community food sector, engaging more people, leading to stronger, healthier, resilient communities across Wales by supporting community food enterprise. Investing in knowledge transfer, community food skills, and social enterprise, we will meet the needs for upscaling food production and financial diversification and sustainability.
- *Resilient Economy – Local Supply Chains (Bridgend County Borough Council):* A project to deliver engagement, capacity building, in-depth research, and feasibility activity overcoming the barriers to shorter supply chains for land-based goods, understanding the needs of relevant SME sectors (e.g. hospitality, retail) and piloting new approaches to engagement. A series of plans for co-operative action will be fully developed.
- *Wales – A Food Destination (LANTRA):* A collaborative project bringing together key stakeholders and commercial food and tourism businesses to develop and pilot sustainable supply chain solutions, with a recognition scheme for businesses sourcing, serving and selling Welsh food. Investment will be made in strengthening the supply chain, improving links, and promoting Wales as a food destination.

- *Taste Local/Blas Lleol (Cotyledon Business & Management Ltd.):* Building on evidenced need and local demand, Blas Lleol aims to create a food system where farmers, producers and growers collaborate through community hubs/markets providing affordable, locally grown/produced food via reduced physical and social supply chains. Thus, it will stimulate social and environmental resilience and identity of rural communities and entrepreneurial capacity.

Introduction

This appendix briefly reviews some of the studies that have assessed the advantages and benefits of farmers' markets. It also considers what the literature says about the factors that make a farmers' market successful. A list of the documents included within the review can be found at the end.

The benefits of farmers' markets

We have a particular interest in this research on the economic benefit of markets, particularly food markets. The direct economic impact on farmers and producers selling their produce at the markets is perhaps the most obvious. There is, however, evidence of the broader economic impact of markets. For example, a Friends of the Earth report (Bullock, 2000) looked at Winchester's farmers' market and showed that it resulted in up to a thirty per cent increase in takings in town centre stores.

Markets Matter: Reviewing the Evidence & Detecting the Market Effect is a 2015 study for the National Association of British Market Authorities (NABMA). It is a comprehensive review of published evidence which is said to 'demonstrate unequivocally' that markets contribute to the economic, social and political health of towns and cities. The research undertaken included an analysis of large footfall datasets to show that markets add to the vitality of town and city centres as well as how they act as important catalysts for change in town and city centres.

It is important to note that the research for NABMA is focused on markets in general, rather than farmers' or food markets. Some reference is, however, made to farmers' markets with reference to the Friends of the Earth report already quoted above, research in 2008 which found that there can be significant earnings for farmers who attend markets,¹⁴ and research in 2011 which found that farmers' and other markets offer income opportunities for local businesses that contribute to their sustainability.¹⁵

There is, however, UK research that has focused on farmers' markets. The Local Government Association's 2001 document *Sustainable Farmers Markets: Developing Good Practice* quotes a survey commissioned by the NFU in March 2000 which estimated that for every £100 spent in a farmers' market, £80 is returned to the local economy (compared to £20 in every £100 spent at a supermarket).

¹⁴ Brown C. and Miller S. (2008).

¹⁵ Morales A. (2011).

A 2005 NEF study¹⁶ examined the contribution that street markets and farmers' markets in London make to their local economies, their local communities, and to London as a whole. The focus was on markets' role in providing access to nutritious food and the wider impacts of London's markets in terms of the jobs they create, their impact on the business community, and the wealth they generate. It examined four markets in depth, including two farmers' markets, in Ealing and Marylebone.

The overall conclusion of the study was that, given their positive and significant contributions to local economic welfare, diet, and sense of place, street markets and farmers' markets should be encouraged. Furthermore, it was considered that, with the right mix of support and appropriate strategies, street markets and farmers' markets could play very significant roles in tackling food poverty, promoting stronger communities, and increasing the impacts of regeneration across London. Specific findings included:

- Farmers' markets were found to be more price-competitive than is often presumed and, as the price analysis demonstrates, can compete effectively with supermarkets.
- Both street markets and farmers' markets provide destinations for customers and encourage people to shop in the areas in which they are based. Interviews with local retailers and analyses of customer spending indicated significant positive impacts on trade for retailers based near the markets. In addition, many retailers note the importance of the markets in creating attractive destinations for shoppers and for improving the environment for all of their customers.
- Markets from both sectors provide valuable, and often missing, *social capital* for the communities in which they are based. They act as meeting places and locations for social exchanges, for learning about food, and for engaging in the community. The benefits appear to be particularly important for the elderly.

Comparison of two traditional markets and two farmers' markets, however, highlighted that with fewer operational hours and days, as well as being less well established within communities, farmers' markets were much less significant in terms of their outputs than traditional markets.

¹⁶ New Economics Foundation (2005).

The suggestion of a knock-on economic impact within the cities or towns hosting the market is supported in a 2001 Countryside Agency publication (Farmers' markets in the south-east of England: their economic, environmental and social performance) which looked at the performance of 18 farmers' markets operating in the region. It found that farmers' markets were actively assisting the rural economy and had a great potential to encourage support for environmentally beneficial forms of land management. It was also found that farmers' markets appeared to be increasing the vitality and profile of town and village centres, benefiting other local traders.

A study¹⁷ by the Joseph Rowntree Foundation in 2006 supports the suggestion that markets have social benefits, describing markets as being 'important sites of social interaction for local communities', particularly through providing spaces for social interaction between older people.

With low costs and a direct relationship with customers, market trading is often noted as one of the best entry points into the world of business. However, there is research that suggests that, whilst market trading costs can be low, some reports identify that there are barriers to starting up in markets that may make it harder for new traders, or even deter potential entrepreneurs¹⁸.

It is often suggested that markets may encourage tourism, particularly in the cases of speciality and farmers' markets. However, an impact on tourism is noticeable by its absence from the benefits identified by the reports discussed above. Indeed, any link to tourism seems to be debatable with a study from the National Market Traders Federation in 2012 which found that there is no strong evidence to support such claims¹⁹.

That report references the comparison of four markets by NEF in the report discussed above that suggests that traditional markets may actually be better at encouraging visitors from further afield than farmers' markets. In that study, 97% and 77% of visitors to the two farmers' markets lived within three miles, compared to just 47% and 56% to the two traditional markets. This does not necessarily mean that customers are more likely to be attracted by the offerings of traditional markets, but these could be better promoted or have higher awareness due to their longer establishment.

¹⁷ Joseph Rowntree Foundation (2006).

¹⁸ Bord Bia (2014).

¹⁹ Oldershaw (2012).

Farmers' market success factors

The following is an extract from a guide published as part of the Making Local Food Work initiative *Building Successful Farmers' Markets*:²⁰

*To be successful a farmers' market must have **enough stalls and enough customers**. It is that simple! The trick is to make sure that your market has a good range covering all the basics – vegetables, fruit, meat, bread, cheese, plus jam, preserves, cakes, non-alcoholic and alcoholic drinks, plants, flowers – that displays on stalls are attractive and generous, and that the layout encourages customers to spend time seeing everything that's on offer. To make sure that all your stallholders want to continue coming back to market time after time there needs to be plenty of customers spending money in the market.*

The following 'success factors' are identified within the same document:

- **Attracting enough customers:** Getting enough customers to your market is crucial to its success. It is all about the external marketing that you do — how you tell people about your market, where it is, and when it runs.
- **Getting customers to spend their money at the market:** The look and feel of the market, the layout, and the quality of produce available are the key things that will influence whether or not a passer-by will stop to buy, and how much money they will spend.
- **Keeping customers:** It's hard to attract new customers to a market, so once you have got them there you need to make sure that they will come back time after time.
- **Community involvement:** Forging close links with your local community can be really helpful. We have observed that markets that have close links with their communities are often more successful.
- **Producers:** It's not always easy to find producers, but to run a successful market it's vital to have a good range attending on a regular basis. It's an important part of an organiser's job to find and retain producers of an appropriate standard.

²⁰ Making Local Food Work (2011). This workbook accompanied a workshop for farmers' market organisers run by Making Local Food Work, a programme funded by the Big Lottery, the aim of which included providing support to existing farmers' markets to help them survive and thrive. That element of the project was run jointly by the Plunkett Foundation and FARMA.

Whilst highlighting the benefits of farmers' markets, a 2001 Countryside Agency report also identified some significant issues which the authors believed would affect the scale and nature of expansion in the future:

- **Support for producers:** including support for existing producers to become more profitable and for new producers to become involved.
- **Development of the market:** including influencing consumer awareness/choice and, therefore, increasing the market for local food purchases.
- **Managing and organising the markets:** developing the structures for collective management of markets and developing a better understanding of best practice. A need for better coordination was also identified to ensure that markets were mutually supportive (rather than in competition).
- **Maintaining the integrity of the farmers' market brand:** systems for accreditation need to be in place to ensure that markets that use the name conform to a standard.

A number of recommendations are made in the report to further develop the potential of farmers' markets:

- Provide training for new and experienced market organisers to enhance their business and disseminate information (e.g. good practice)
- Provide advice to producers on ideas for diversification and by providing a list of products sought at markets
- Local Authorities should support the development of markets in their first three years
- Government agencies should aid the coordination and management of the markets and the implementation of a system for accrediting markets.

The research undertaken during the development of the guide to food markets in Ireland²¹ identified a series of challenges that food markets need to overcome in coming years, but also a series of opportunities. These opportunities are seen as positive indicators of the very real potential for food markets, as long as market managers and stallholders are willing to take the actions necessary to address the challenges identified.

²¹ Bord Bia (2014).

Challenges	Opportunities
Ongoing emphasis on price among consumers. There is a perception by some that food markets are more expensive than conventional retailing.	A greater interest in, and receptiveness to, locally sourced foods among consumers. There is a higher level of awareness among consumers of the value of provenance and an individual product's story, whether regarding artisan products from Ireland or abroad.
The charges for a pitch.	There is a strong link in the consumer mind-set between market produce and a healthier lifestyle.
The issue of inclement weather that comes with outdoor markets. Strong winds and stormy conditions not only are off-putting for consumers, but also create health and safety issues with regard to stalls, gazebos, canopies and umbrellas.	There is a growing appeal in sourcing food through small and local artisan producers, and enjoyment of the more creative presentation of food found at food markets.
A need for effective management structures to address facility requirements and to ensure that health and safety standards are consistently high.	In urban areas, there is a growing interest in high-quality 'street food'.
A need for greater support and understanding from some local government bodies.	Increasingly, consumers value the ability to engage in a direct dialogue with the person who grew or made their food products.
A lack of training opportunities for stallholders and market managers to address both operational standards and market management skills.	Consumers take pleasure in the 'theatre' of food, particularly watching it being prepared or cooked in the food market environment.
A fall-off in volunteerism that has particularly affected stallholder-managed markets, i.e. self-managed markets.	Food markets can play an important role as incubators for start-up food companies, allowing them to trial products at a relatively low cost.
	Strong food markets open up opportunities for community projects that can involve local/urban growers and bring economic, educational and recreational benefits.

Appendix 5: References

Reports

Morales A. (2011) *Marketplaces: prospects for social, economic and political development*. *Journal of Planning Literature* 26 (1): 3–17.

Brown C. and Miller S. (2008) *The impact of local markets: a review of research on farmers' markets and community supported agriculture*. *American Journal of Agricultural Economics* 90 (5): 1298–1302.

Hallsworth A. et al. (2015) *Markets Matter: reviewing the evidence and detecting the market effect*. Institute of Place Management and Manchester Metropolitan University.

Bullock S. (2000) *The Economic Benefits of Farmers' Markets*. *Friends of the Earth*.

Bord Bia (2014) *Guide to Food Markets in Ireland*.

Thomas B. (2003) *The Adoption of the Internet by Farmers Markets in South East Wales*. University of Glamorgan.

The Countryside Agency (2001) *Farmers' Markets in the South East of England: Their Economic, Environmental and Social Performance*.

Joseph Rowntree Foundation (2006) *Markets as sites for social interaction*.

Local Government Association (2001) *Sustainable Farmers' Markets: Developing Good Practice*.

Making Local Food Work Programme (2012) *Making Local Food Work Magazine*, March 2012.

Miller Research (2015) *Evaluation of Fork2Fork*. Francis Balsom Associates (FBA), funded by the Welsh Government.

Miller Research (2014) *Assessing the supply and demand for vocational education and training across the Food and Drink Supply Chain in Wales*. The Welsh Food & Drink Skills Project.

New Economics Foundation (2005) *Trading Places: The local economic impact of street produce and farmers' markets*.

Oldershaw J. (2012) *Retail markets in the UK: A review of recent research*. National Market Traders Federation.

FARMA (2007) *A Comparative Study of Farmers' and Producers Markets within Wales*. A study for the Welsh Government.

Making Local Food Work (2011) *Building Successful Farmers' Markets*. Plunkett Foundation, FARMA funded by the Big Lottery Fund
(<http://www.farma.org.uk/media/originals/0/76/building-successful-farmers-markets.pdf>).

European Commission (2013) *Report from the commission to the European Parliament and the Council on the case for a local farming and direct sales labelling scheme*.

Local Government Regulation (2011) *Buying food with geographical descriptions – How 'local' is 'local'? A Local Authority Survey*.

Website/online directory references

Country Markets (<http://www.country-markets.co.uk/find-a-market>)

Farmers Markets in Wales (<http://www.fmiw.co.uk/>)

Fork 2 Fork (http://fork2fork.wales/en/community#b_start=0&c2=farmers-markets)

National Farmers' Retail and Markets Association – FARMA
(<http://www.farma.org.uk/members-map/>)

Think Local (<http://www.thinklocalscotland.co.uk/farmers-markets/>)

Discover Northern Ireland (<http://www.discovernorthernireland.com/Ulster-Farmers-Markets-A1930>)

Other directories referenced

Gower Holidays
(<http://www.thegower.com/attractionsandactivities/localproduce/localproduce.html>)

The Independent
(<http://www.independent.co.uk/extras/indybest/food-drink/the-10-best-farmers-markets-8521126.html>)

Local Foods
(<http://www.localfoods.org.uk/local-food-directory?catid=4>)

Gourmet Wales
(<http://www.gourmetwales.co.uk/farmers-markets>)

Google search terms used

“Top farmers markets”

“Wales farmers markets”

“England farmers’ markets”

“Scotland farmers’ markets”

“Northern Ireland farmers’ markets”

When attempting to source extra details for markets the name of that market would be typed into Google and Facebook, e.g. “Ogwen Local Produce Market” and “Haverfordwest Farmers’ Market”. This would also include searching the Welsh names of those markets which are held in more Welsh-speaking parts of Wales, e.g. “Marchnad Cynnyrch Lleol Pontyberem”, “Marchnad Porthmadog”, “Marchnad Machynlleth”, and so forth.

Appendix 6: List of Markets Identified

1. Abakhan Farmers Market
2. Aberaeron Country Market
3. Aberdare Market
4. Abergavenny Farmers' Market
5. Abergavenny Market
6. Aberporth Country Market
7. Aberystwyth Farmers' Market
8. Anglesey Farmers' Market
9. Brecon Country Market
10. Brecon Farmers Market
11. Bridgend Farmers Market
12. Bridgend Market
13. Builth Wells Country Market
14. Caerphilly Farmers Market
15. Cardiff Central Market
16. Cardiff Riverside Farmers Market
17. Carmarthen Farmers' Market
18. Celyn Farmers' Market (Mold Farmers' Market)
19. Chepstow Country Produce Market
20. Chepstow Farmers' Market
21. Clydach Local Produce Market
22. Colwyn Bay Farmers' Market
23. Conwy Country Market
24. Conwy Farmers Market
25. Cowbridge Farmers Market
26. Denbigh Country Market
27. Dolgellau Farmers' Market
28. Fishguard Farmers' Market
29. Fishguard Indoor Market
30. Garden Village Market
31. Glyndwr Farmers' Market
32. Gorseinon Food and Craft Fayre
33. Haverfordwest Farmers' Market
34. Haverfordwest Indoor Market
35. Hay on Wye Country Market
36. Hay on Wye Market
37. Knighton Community Market
38. Lampeter Farmers Market
39. Lampeter People's Market
40. Llanberis Farmers' Market
41. Llanddewi Brefi Local Produce Market
42. Llandeilo Country Market
43. Llandovery Farmers' Market
44. Llandrindod Wells Country Market
45. Llandysul Country Market
46. Llanelli Market
47. Llangedwyn Farmers Market
48. Llangefnï Country Market
49. Llangollen Country Market
50. Llangrannog Local Producers Market
51. Llangynidr Farmers' Market
52. Llanrhystud Country Market
53. Llanrwst Country Market
54. Llanvihangel Farmers' and Vintage Market
55. Llanwrtyd Wells Farmers' Market
56. Llanyrafon Manor Food and Craft Market
57. Machynlleth Market
58. Maesteg Market
59. Manorbier Country Market
60. Marina Farmers Market
61. Merthyr Tydfil Indoor Market
62. Mold Country Market
63. Mold Market
64. Mumbles Produce Market
65. Neath Indoor Market
66. New Quay Country Market
67. Newcastle Emlyn Country Market
68. Newport City Market
69. Newtown Country Market
70. Newtown Farmers Market
71. Ogwen Local Produce Market
72. Oystermouth Country Market
73. Pembroke Country Market
74. Pembroke Dock Country Market
75. Pembroke Dock Indoor Market
76. Penarth Farmers Market
77. Penclawdd Local Produce Market
78. Pennard Local Produce Market
79. Pontarddulais Local Produce Market
80. Ponttiets Local Produce Market
81. Pontyberem Local Produce Market
82. Pontypridd Market
83. Porthmadog Local Produce Market
84. Presteigne Farmers' Market
85. Rhiwbina Farmers' Market
86. Rhos on Sea Country Market
87. Rhosneiger Farmers Market
88. Risca Farmers Market

89. Roath Farmers' Market
90. Rossett Country Market
91. Royal Welsh Farmers Market
92. Ruthin Country Market
93. Sketty Local Produce Market
94. Snowdonia Market
95. St Clears Farmers Market
96. St Davids Country Market
97. St Dogmaels Farmers' Market
98. Swansea Market
99. Tenby Country Market
100. Tenby Indoor Market
101. Tonyrefail Farmers Market
102. Tregaron Country Market
103. Uplands Farmers market
104. Usk Country Market
105. Usk Farmers' Market
106. Welshpool Indoor Market
107. Wrexham Country Market
108. Wrexham Indoor Markets

Umbrella Organisations

North East England Farmers' Markets

<http://www.neefm.org.uk/>

North East England Farmers' Markets (NEEFM) is an umbrella organisation for farmers' market operators in the region.

Its objectives are:

- to raise the quality and consistency of farmers' markets, including promotion of FARMA certification;
- to raise consumer awareness and demand;
- to improve the range of producers attending markets and support producer development;
- to promote intra-regional and inter-regional co-operation between markets;
- to develop a sustainable future for farmers' markets;
- to educate the general public on the benefits of healthy eating;
- to provide a 'voice' for farmers' markets in the northeast of England.

Membership is open to any organisation operating a farmers' market in the region that meets the basic principles of farmers' markets as set out by FARMA.

Thames Valley Farmers' Market Co-operative

Thames Valley Farmers' Market Co-operative exists to manage and promote Farmers' Markets, enabling farmers and small producers to sell their produce directly to you!

We began operating in the Thames Valley area in 1999. Since then our markets have flourished and we now operate in 16 towns. Buying at farmers' markets helps to support local farmers and producers. There are no middlemen involved, and no profits for supermarkets and their shareholders.

We are a non-profit-making organisation and in 2003 we became a co-operative. The funds that we raise through membership fees and stall fees are ploughed back into the co-operative. All the producers at our markets are voting members of the co-operative who can share in the way the co-operative is run.

The Australian Farmers' Markets Association

<http://farmersmarkets.org.au/>

The Australian Farmers' Markets Association (AFMA) is a voluntary organisation convened in 2003 to create a networking entity committed to supporting the development and growth of best-practice and sustainable farmers' markets across Australia. AFMA assists market operators to exchange information, coordinate policy, and promote grower-centric farmers' markets across Australia. AFMA also provides helpful information to farmers seeking opportunities to sell their fresh produce directly to consumers through Australian farmers' markets — and helps shoppers to locate their nearest farmers' market.

Great British Market Awards 2016

Best Large Food Market Winner – Borough Market

A market that is iconic and operated by a charitable trust with 117 stalls and 100% occupancy rate. In just 12 months it has gained an additional 20,000 followers on Twitter, taking its following to 50,000 followers and some 65,000 followers on Facebook. It is celebrating a 1,000 year campaign of markets on the south side of the River Thames and has wonderful links with community, partners and friends. It is nationally, internationally and worldwide famous but above all it is not complacent, continually driving standards, change and challenge alongside reinvestment.

<http://boroughmarket.org.uk/>

Best Small Food Market – Electric Nights Streetfood

This is an exciting market that enhances the local night time economy with copious local support, trader interest and themes. It changes its appearance every month with themes from 50's rock and roll to Oktoberfest. It involves extensively the local community groups with live performances and provides a welcoming fun evening out for all the family in the town centre in a safe environment. Advertising and marketing is extensively through social media and the partnership approach has brought about free town centre car parking. This market really provides a fun community event, promotes the local area and also supports local food and drink vendors and musicians from the South West.

<https://electricstreetfood.wordpress.com/>

Markets in Wales

Aberystwyth Farmers' Market

The market was launched in May 2000 and continues to be successful, hosting up to 30 stalls every first and third Saturday in the month. In 2011 the market was voted amongst the Top 10 Farmers' Market in the UK. Writing in the Times newspaper, Henrietta Green, widely acknowledged as a leading expert of British regional and local quality food, said: "Aberystwyth is a low key market but you get the sense that it is hugely important to the community, it is full of good honest producers."

http://www.aberystwythfarmersmarket.co.uk/index_english.html

Mumbles Produce Market

Set against the sweeping backdrop of Swansea Bay and the Mumbles lighthouse, the Mumbles Produce Market on the second Saturday of the month.

<http://www.mumbles.co.uk/events/mumbles-farmers-market>

Snowdonia Market

Snowdonia Market Group is a mobile local-produce market. The group started as a backlash against the large supermarkets and out-of-town stores. The scheme's intention is to contribute to the regeneration of surrounding towns and villages and the group includes 12 local producers selling vegetables, meat, cakes, bread and spirits.

The group was founded through Porthmadog Local Produce Market, which is held on the last Saturday of every month, and some of the producers decided to work together in order to take the farmers market on tour.

The market was officially launched on the Maes in Caernarfon on the 5th of June 2012, with the group having received support through the Local Produce project. By now they have visited a number of different locations including Blaenau Ffestiniog, Llanberis, Hafan y Môr, Caernarfon and Bangor.

Financial and practical support was received by the scheme to purchase gazebos and special signs for the producers. The gazebos meant that the producers could create a mobile market across North Wales which would also be an effective way of promoting and marketing their products. As noted by one of the producers:

“Without the grant money we wouldn’t have been able to realise the plan. The money has supported us to push forward with our ideas and what we were trying to achieve. It’s a very specialised idea so having the support of our own local authority is beneficial in itself. They understood what we were trying to achieve and how to do it.”

One of the producers suggested that the support has enabled her to turn something that was a hobby into work and potential income. It was also suggested that the scheme has enabled producers to increase their customer base which, in turn, has increased turnover and profits. For some producers, their whole income is dependent on the markets and these are the ones who have benefitted most from the scheme:

“The support from Annog has enabled us as a family to diversify on the farm to some extent and has enabled us to have a platform of some sort to display and sell our products. By now, most of our income is generated by this.”

www.facebook.com/MarchnadEryriSnowdoniaMarket

Local Food Initiative: Making Local Food Work

Making Local Food Work aimed to reconnect people and land through local food by increasing access to fresh, healthy, local food with clear, traceable origins. The five-year programme of work explored community enterprise approaches to connecting land and people through food, and creating the practical tools and support to help make such enterprises thrive.

The Making Local Food Work programme brought together a consortium of national organisations working to improve the sustainability of community food enterprises such as co-operatively managed farmers’ markets; community owned village shops; country markets; sustainable food hubs; food co-ops and buying groups; and community supported agriculture — all of which bring producers and consumers closer together. Making Local Food Work was co-ordinated by the Plunkett Foundation and funded by the Changing Spaces programme of the Big Lottery.

Sustain was a national consortium partner in Making Local Food Work, coordinating two strands of work: (1) Food Co-ops and Buying Groups; and (2) Food Supply and Distribution.

BWYD A DIOD CYMRU
FOOD AND DRINK WALES



www.gov.wales/foodanddrinkwales

bwyd-food@wales.gsi.gov.uk

 @FoodDrinkWales