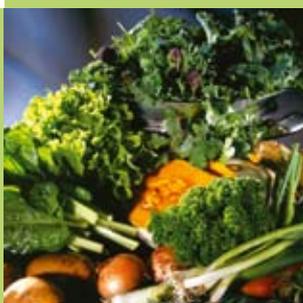
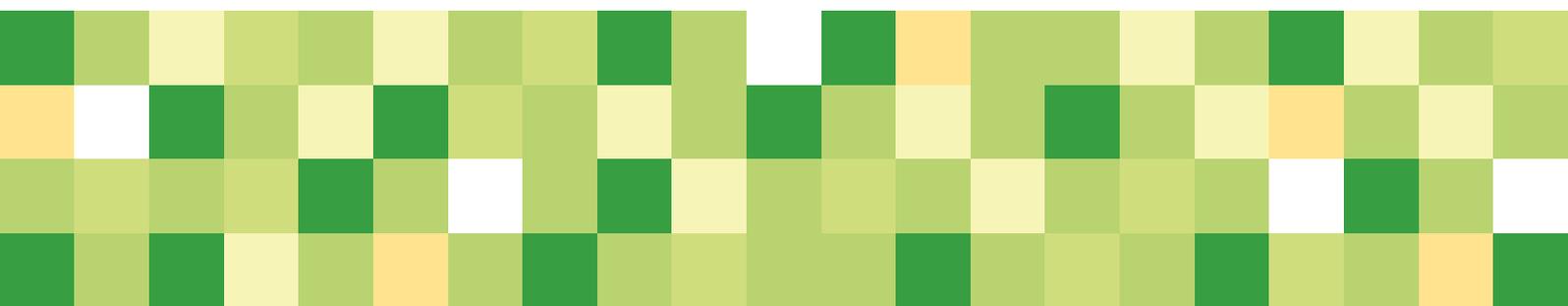




Llywodraeth Cynulliad Cymru  
Welsh Assembly Government

[www.cymru.gov.uk](http://www.cymru.gov.uk)

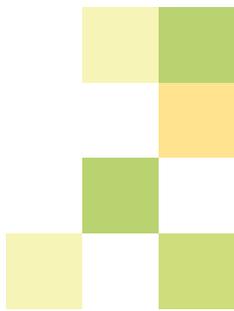
# Strategic Action Plan for the Welsh Horticulture Industry



## Vision

**A sustainable horticulture  
industry that benefits the  
people and environment  
of Wales**

April 2010



Further copies available from:

Food, Fisheries and Market Development Division  
Llywodraeth Cynulliad Cymru / Welsh Assembly Government  
Rhodfa Padarn  
Llanbadarn Fawr  
Aberystwyth  
Ceredigion  
SY23 3UR

e-mail: [foodpolicy@wales.gsi.gov.uk](mailto:foodpolicy@wales.gsi.gov.uk)



# Contents

Foreword from the Minister for Rural Affairs	2
Chapter 1	
Executive Summary	4
Chapter 2	
Review of the Welsh Horticulture Industry	7
2.1 Overview	7
2.3 Fruit and vegetable production	7
2.6 Ornamental plant production	8
2.7 Novel crops	8
2.8 Landscape	9
2.9 Turf and sports turf	10
Chapter 3	
Challenges and Opportunities	11
3.5 Market issues	12
3.12 Policy and regulatory issues	15
3.15 Education	16
3.16 Physical environmental issues	16
3.21 Social/community issues	19
Chapter 4	
Objectives and actions	22
Chapter 5	
Implementation, monitoring and evaluation	34
Annex 1:	
Agri-Food Partnership Horticulture Strategy Group Members	36
Annex 2:	
Government & Industry Delivery Partners	38

## Foreword from the Minister for Rural Affairs



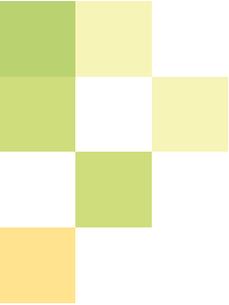
This Strategic Action Plan for the Welsh Horticulture Industry identifies ways in which the horticulture supply-chain can work together to meet the challenges the industry will face in the future. It has been developed in partnership with the Welsh horticulture industry and the Agri-Food Partnership's Horticulture Strategy Group. I would like to take this opportunity to thank the group for their input in the development of this Plan.

The Plan sets out a vision of a sustainable horticulture industry that benefits the people and environment of Wales.

The horticulture industry in Wales faces a number of challenges as it strives to achieve continuing sustainability and profitability whilst meeting the evolving and complex demands of consumers and the environment. Changes in the increasingly global market and the pressure to mitigate the worst effects of climate change are influencing policy direction in Wales, as it is in many other Countries and this presents opportunities, as well as challenges, for the horticultural industry.

There are opportunities for farmers to diversify and for existing growers to develop their businesses further. The increasing consumer demand for local and regional food provides an exciting challenge for the industry. This, along with the increasing awareness of healthy eating initiatives and public health provides an opportunity for Wales to provide as wide a variety of fruit and vegetables as possible.

This Strategic Action Plan for the Welsh Horticulture Industry is one of a number of sector specific plans for the Welsh food industry which relate to the overarching Food Strategy for Wales which is currently being developed.

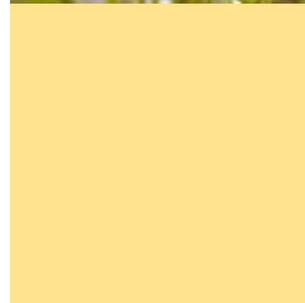


Our Food and Drink Advisory Partnership is taking forward this work and it is intended that the strategy will address the major strategic issues facing primary production sectors and all those within the Welsh supply-chain. It will also reflect the Welsh Assembly Government's commitment to sustainable development.

I believe that the horticulture industry in Wales has great potential and I will do all I can to support its development. In order to succeed, we have to work together across the whole supply-chain and I urge the industry to respond to the challenges and to take advantage of the opportunities that lie ahead in order to secure a sustainable future for the sector.



**Elin Jones AM**  
Minister for Rural Affairs



# Chapter 1

## Executive Summary

### Introduction

1.1 The Strategic Action Plan for the Horticulture Industry in Wales sets out the Welsh Assembly Government's vision for developing the sector over the coming years, for **a sustainable horticulture industry that benefits the people and environment of Wales**. Developed in partnership with the Agri-Food Partnership Horticulture Strategy Group, the Action Plan is one of a number of sector-specific strategies for the Welsh food and drink industry under the overarching Food Strategy for Wales who will address the major strategic issues facing primary production sectors and all those within the supply chain.

### The Current Situation

1.2 Building on the activity of the last Horticulture Strategy for Wales, this Action Plan seeks to continue the partnership approach recognising the value that horticulture industry can bring to Wales, both in respect of the rural and social economy whilst taking into account of emerging issues such as climate change, as well as delivering social and community benefits as identified in the Government of Wales' *One Wales Agreement (2007)*.

1.3 Wales' horticultural industry is diverse and is developing in its economic significance. Welsh Assembly Government statistics show that in 2007 there were 38,218 agricultural holdings in Wales, with an average size of 40ha. Of these, 389 (or 1%) of the total were classified as horticulture. Horticultural land comprises 54% vegetables and other crops grown in the open, 43% orchards and small fruit and 3% under glass or plastic.

1.4 Although still a small part of agriculture, horticulture delivers many benefits that help to service a range of environmental, social and economic needs. Home grown fruit and vegetables can help the population eat their



target five portions of fruit and vegetables each day and efficient supply chains can also ensure that these fruit and vegetables have low “food miles”. But it is not just food horticulture which brings many significant benefits: providing attractive landscaping around homes, retail parks and offices enhances the aesthetic value of an area, making it a more attractive place to live, work and invest in. At a community level, provision of parks and gardens that provide access for all to green areas provides tangible benefits to the health and well being of those they serve.

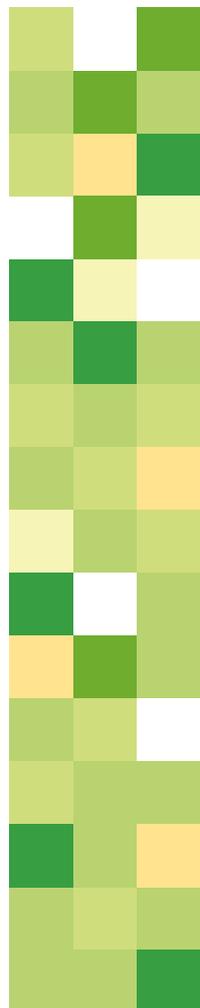
1.5 A range of challenges and opportunities reflect the diverse nature of Welsh Horticulture and a series of goals have been identified to address these. The Strategic Action Plan for the Welsh Horticulture Industry is framed around four key areas, and 40 strategic outcomes which will be a focus for implementing the strategy.

1.6 The Action Plan sets out to improve the levels of understanding of market trends and inform consumer behaviour. The horticulture industry is a market focussed and demand led sector with opportunities to increase the range and volume of production in Wales; rationalising supply chains; quality assurance of products and services; improving linkages with the tourism industry and encourage the development of new products and value-adding.

It is also recognised that there is a need for more Wales-specific baseline data to provide an evidence base from which to develop, benchmark and monitor the industry and to raise the profile of horticulture in Wales and the contribution it makes.

1.7 The Action Plan also looks to improve the business performance of producers and processors in response to changing market conditions, environmental requirements and consumer behaviour. The need to comply with changing legislative requirements is of particular concern to the industry, especially perhaps the on-going series of changes to EU pesticide regulations and its impact on primary producers. Ensuring the industry is kept abreast of these issues, as well as facilitating access to technical advice and guidance is vital to protect and grow the industry.

Supporting the industry in looking at opportunities to mitigate climate change and consider resource management and organic production are key focus opportunities for development of more sustainable and efficient practices.



## **Develop and improve agronomic and other technical skills to support horticulture in Wales**

1.8 Provision of appropriate education, training and career development opportunities is vital to ensure a strong foundation for the industry. Ensuring knowledge transfer and dissemination of research from organisations to industry is an area for development, as is ensuring Wales' needs are addressed in research programmes going forward.

1.9 The purpose of the Strategic Action Plan for the Welsh Horticulture Industry is to provide a framework which will be both dynamic and evolving. The delivery of the plan will be adapted to meet changing circumstances and needs of the industry. Co-operation, collaboration and industry involvement will be key to the success of our vision.



# Chapter 2

## Review of the Welsh Horticulture Industry

### Overview

2.1 The horticulture industry embraces a diverse spectrum of sectors which include fruit and vegetable production, ornamental plant production (including floriculture), novel crops, landscaping and turf. Whilst representing a diverse range of interests, there are common issues, opportunities and needs to address.

Accurate baseline statistics on the sector is lacking, largely due to the fact that not all horticultural businesses are registered with the Welsh Assembly, and are not obliged to do so.

2.2 According to Welsh Assembly Government statistics, in 2007 there were 38,218 agricultural holdings in Wales, with an average size (2006 data) of 40ha. Of these, 389 (or 1%) of the total were classified as horticulture. Data collection in relation to vegetable production in particular is confounded by the ephemeral nature of the crops and the fact that one area might (indeed will usually) be used to produce more than one crop in any calendar year.

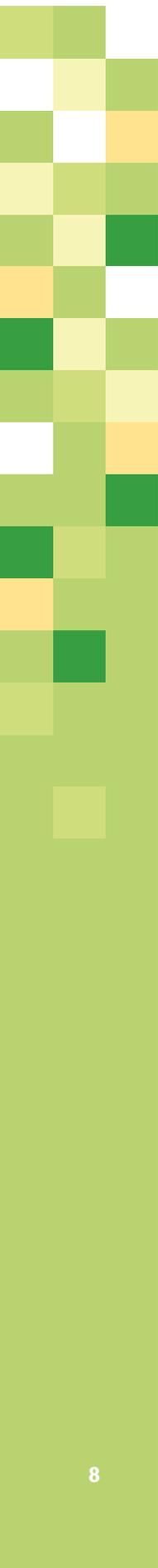
### Fruit and vegetable production

2.3 The value of Welsh Fruit and vegetable production is estimated to be £22.6million; representing 2% of the total Welsh agricultural output of £874 million. The retail market is dominated by the multiple retailers. Direct sales, e.g. farmer's markets, box schemes and farm shops, are important to many smaller growers and in the organic sector.

2.4 The small size of the field scale horticulture sector in Wales is limited by geographical factors such as altitude, soils and weather conditions which limit the land area suitable for commercial horticultural crop production. Much of Wales' land area is classified as Severely Disadvantage (SDA) or Less Favoured (LFA). There are a number of initiatives to increase the supply of field-scale seasonal vegetables to meet multiple retailer market demand for local produce. In 2008,

<sup>1</sup> Increasing the Product Range of Welsh Grown Vegetables - CALU in line with Welsh Assembly Government's local sourcing and food tourism Action Plans. Levercliffe

<sup>2</sup> CALU horticulture database (2008)



horticultural growers in Wales became eligible to apply for the Single Farm Payment for the first time and there is evidence of some livestock farms diversifying into fruit and vegetable production.

2.5 Research has identified opportunities to expand vegetable production, demonstrating that field vegetables can make a positive contribution to overall farm business profitability. Market demand is firm for Welsh produce in both the multiple retail and direct sales sectors, however the availability of supply can often be a limiting factor, especially for larger markets. Further market opportunities lie in public procurement and the tourism sector.

The need for food security and greater self-sufficiency as well as the global effects of climate change are likely to increase pressures to produce greater yields of food crops in Wales using technically efficient, low-energy, sustainable and environmentally benign methods.

## **Ornamental plant production**

2.6 Ornamental horticulture relates to plants grown for their aesthetic and ornamental values. It encompasses a diverse range of plants including: trees, shrubs and climbers; hardy perennials/ornamentals; herbs for ornamental purposes; alpiners; ferns; bulbs; plants grown for floristry (flowers and foliage); and bedding plants. The majority of large-scale ornamental and floriculture production takes place under protected cover or within pots. Therefore land-quality is less of a constraint to this sector of horticulture than for field scale vegetable production.

There are currently approximately 237 businesses across Wales where production of ornamental plants is their primary business. Over and above this, there are over 80 garden centres where production of plants is not their primary business.

An increase in the demand for growing stock (flowering or foliage plants) of around 2% year-on-year until 2012 would make this the largest segment of the ornamentals market and also the most dynamic in terms of sales growth (Keynote, 2008).

## **Novel crops**

2.7 A novel crop is defined on the basis of its production method, processing requirement and market destination. Novel crops include those with a high income per hectare, and that require specialist processing facilities to supply a niche market. This definition includes a variety of non-commodity crops that are, or have the potential to be grown commercially in Wales, these include:

- **Nutraceutical and Pharmaceutical crops** Nutraceuticals include raw herbs (dried or fresh), taken for medicinal purposes rather than culinary, taken as tinctures (infusion of herb/s in alcohol) and extracts (usually using solvents). Pharmaceutical crops are typically single chemical entities with well proven medical efficacy.
- **Cosmetics** Novel crops can be used as constituents of cosmetic products.
- **Novel oilseeds** plant species that produce seeds with an oil content of 20% or higher.
- **Carbohydrate crops** which have the potential to replace petrochemical feedstock used to produce plastics.

The need to improve sustainability and the increasing desire to seek alternative sources of income from the land has intensified industry interest in novel crops. However, activity within the sector in Wales is extremely fragmented and isolated. In some cases there is only one or a small number of holdings involved in producing a novel crop.

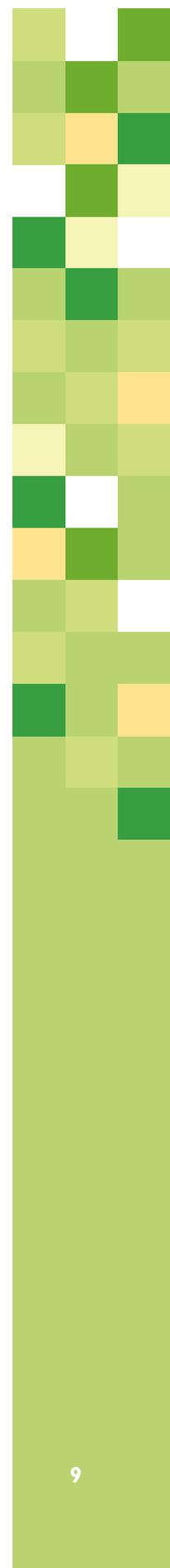
## Landscape

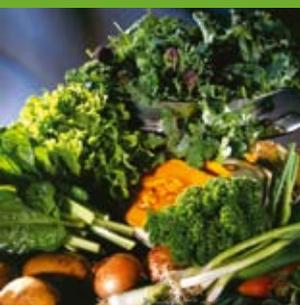
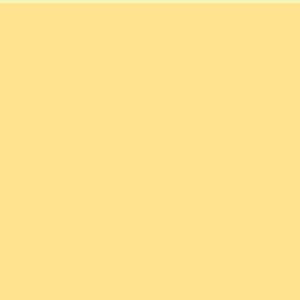
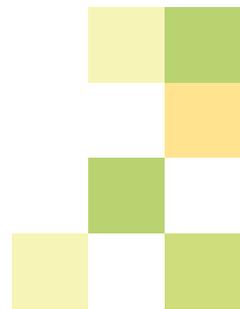
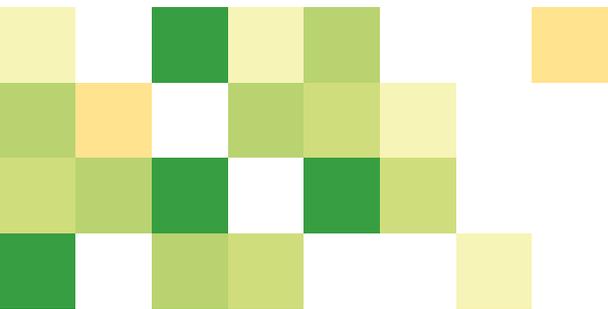
2.8 The landscape industry comprises landscape architects, garden designers, interior landscape designers, contractors, interior landscape maintenance, planners, developers, environmental managers, garden tourism, scientific consultants, and parks and gardens operators, arboriculturists and fencing contractors.

Wales has a smaller proportion of landscape businesses compared with the rest of the UK. The industry comprises predominantly micro and small businesses with few medium sized enterprises.

Future business trends and potential growth areas for this sector include:

- environmentally sustainable projects. These will require new skills as there is likely to be an increase in specification of sustainable materials, sustainable urban drainage systems (SUDS) and sustainable designs and the use of local provenance material
- flood risk management projects including water course maintenance and tree planting
- community based projects, including vegetable production and green space maintenance
- public sector contracts





- facilities using new technology such as green walls and roofs which will be developed by architects
- multi-skilled companies are likely to expand, e.g. businesses that can offer design, build and maintenance services
- historic and heritage landscape maintenance; and
- new trends in garden design.

### **Turf and Sports Turf**

2.9 This sector includes the producers and suppliers of turf, predominantly for lawn construction and maintenance, and the maintenance of natural, outdoor, sports surfaces. The construction of lawns and sports surfaces is normally undertaken by landscape contractors that are covered in Section 2.8 above. Synthetic surfaces have not been included. This section also relates to supply of services, e.g. greenkeepers, groundsmen/women, and scientific sports turf consultancy that occur in the construction and maintenance and management of sports turf facilities.

Turf production and supply is a small industry in Wales. The main challenge is seen as the access to appropriate, local training by greenkeepers and groundsmen/women. The major new trend is likely to be the production of “natural” turfs which include more native species in a biodiverse mix.

With society’s increasing focus on sport, physical activity and public health, the industry is well placed to capitalize on further opportunities for expansion in this area, such as the Golf’s Ryder Cup, Test cricket, etc.

# Chapter 3

## Challenges and Opportunities

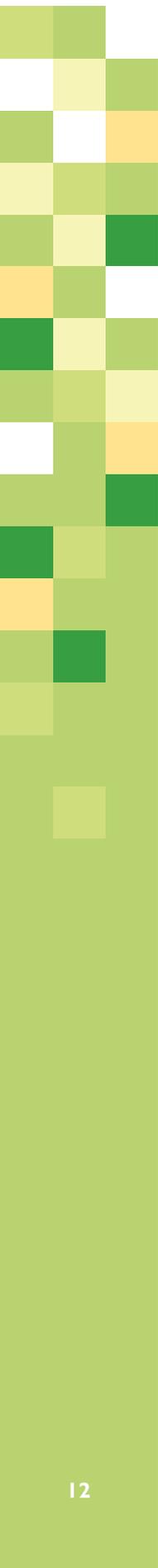
3.1 The horticulture industry in Wales has a number of positive advantages. Large areas of Wales benefit from mild weather, a long growing season and adequate water supply and with mounting pressures on water resources, the latter is becoming an increasingly important factor. The pressures of climate change may effect this in the longer term, but there are no immediate concerns.

The Welsh Horticulture Industry can take advantage of Wales' strengthening reputation as a food nation as well as its high quality natural environment.

3.2 In order to ensure that Wales' horticulture industry is in a position to respond to the challenges and opportunities outlined in this chapter, reference needs to be made to the Government of Wales *One Wales Agreement (June 2007)*. The Welsh Assembly Government is committed to working for a better future for food producers, food processing and agri-food businesses in Wales; to developing income and employment and to helping the agricultural industry adapt for the future. This Action Plan has been developed with due regard to issues of equality, taking care not to introduce distortion in the market and fair employment practice or to compromise opportunities for any sectors.

3.3 Specifically, reference should be made to the following Welsh Assembly Government policy commitments:

- One Wales - a progressive agenda (2007).
- One Wales: One Planet - a new sustainable development scheme for Wales (2009).
- Welsh Rural Development Plan 2007-2013.
- Wales Spatial Plan.
- Farming, Food and Countryside - Building a Secure Future (2009).
- Food Strategy for Wales (expected 2010).

- 
- Food Tourism Strategic Action Plan (2009).
  - Local Sourcing Strategic Action Plan (2009).
  - Strategic Action Plan for the Welsh Organic Industry (expected 2010).
  - Support for Young Entrants to Farming Strategy (2009).
  - Appetite for Life Action Plan (2008).
  - Skills That Work for Wales (2008).
  - Environment Strategy for Wales (2008).

3.4 Outlined below are the key issues and challenges currently facing the Horticulture Industry in Wales.

## **Market issues**

### **Market Opportunities**

3.5 On a UK level, 80% of food is sold by multiple retailers. Due to the geographical location and generally small scale nature of the horticultural businesses in Wales, this presents a logistical challenge. However, this may also present opportunities for those with the scale and infrastructure to meet supply requirements.

3.6 With increased consumer interest in local food supply, there are also opportunities to develop markets via local retail and direct marketing methods, such as box schemes, farmers' markets, farm shops and internet selling. There are also opportunities to re-educate the consumer on the benefits of purchasing local seasonal fruit and vegetables, and to encourage hospitality providers to feature local, seasonal fayre on their menus.

The perceived quality attributes of fresh local food are especially important in the growth of the Food Tourism sector, which represents a particular opportunity for horticulture.

Wales has been in the forefront of initiatives in organic farming and growing since the 1970s, with organic fruit and vegetables, being the main entry point into the market for most organic consumers. Welsh Organic producers can take advantage of this trend.

One key element of the Welsh Assembly Government's Local Sourcing Strategic Action Plan is to encourage the whole public sector to procure more locally sourced products. Also, the Welsh Assembly Government's Appetite for Life Action Plan sets out the strategic direction and actions

required to improve the nutritional standards of food and drink provided in schools in Wales. Supplying the public sector with horticultural products and services may therefore provide an additional opportunity for the industry.

Wales has a high dependency on imported horticultural products across all sectors (flowers, ornamentals and food crops). There is a great opportunity to increase production across these sectors and consequently displace the proportion of horticultural products that are imported. This is also applicable to service providers (e.g. landscape architects could specify local provenance plants).

***The Welsh horticulture industry needs to look at ways to raise the profile of the high quality products and services delivered by Welsh horticulture through improved marketing and branding activities of the industry, encouraged by relevant support initiatives.***

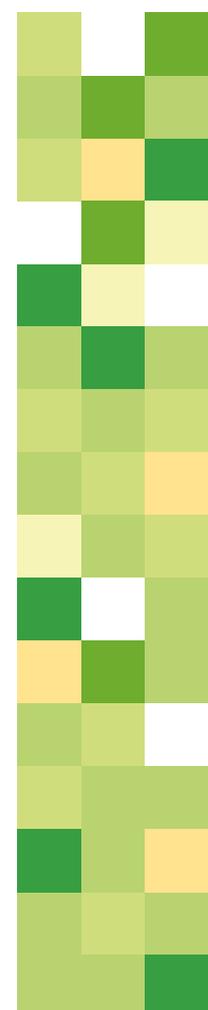
***There are opportunities for the Horticulture Sector to increase the use of Welsh grown fresh produce in the tourism and hospitality industry, to promote the quality of its products and encourage consumers to purchase locally produced food.***

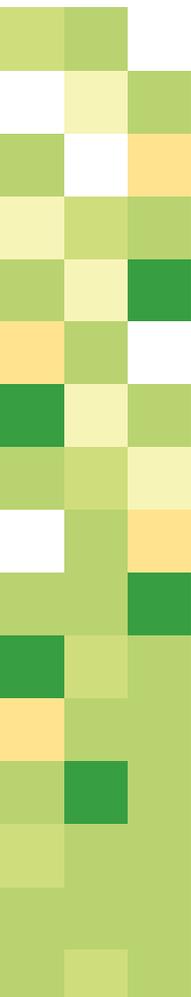
***Within each region studies will be carried out on the seasonal availability of local products and this should be disseminated to restaurants and other hospitality providers.***

### **Supply chain linkages and Supply Issues**

3.7 For many small businesses, locating suitable processing facilities and a route to market pose a greater challenge than production. Physical distribution can also be difficult within Wales and the development of supply chains between producers, processors and retailers presents opportunities for business growth as well as greater cohesion of business activity across the sector.

Initiatives to increase the sourcing of Welsh produce have highlighted supply-side issues, including the range, volume and consistency of quality of horticultural products. Opportunities to establish the needs of both processors and retailers in Wales in order to meet the potential demand across the range of markets needs to be seized. It will be necessary to increase the range and volume of Welsh produce to guarantee appropriate volumes and continuity of supply.





3.8 Wales has suitable land available to expand its horticulture production. New and existing growers should be encouraged to supply horticultural products that satisfy market demand. This will also help to address issues of food security. It would be beneficial to encourage new entrants into the horticulture industry and reference should be made to the Welsh Assembly Government's Young Entrants Strategy.

3.9 The availability and current structure of the Single Payment means that it is possible that livestock farmers may be attracted to horticultural production. This could help address the supply issues within the industry as well as helping to sustain rural businesses and communities. The agriculture industry should be encouraged to see diversification into horticulture as an opportunity and take advantage of the support available through services such as Farming Connect.

***Support will be made available for collaborative ventures to set up distribution hubs.***

***Information and technical advice will be made available to farmers looking at horticulture as a viable diversification proposition. Providing networking and learning opportunities across the industry through continual professional development and open events.***

### **New product development and adding value**

3.10 Adding value to primary produce can provide an opportunity for producers to improve their profitability and creates an additional economic benefit to Wales. New product development can involve risks and challenges for producers and they should be encouraged to utilise support available to guide their business planning decisions.

***A range of support services will be made available in line with industry needs to encourage and support innovation, new product development and added value for Horticulture in Wales.***

### **Quality assurance**

3.11 There are a range of Quality Assurance schemes tailored to horticulture. Meeting these requirements can be seen as a challenge to small producers with diverse product ranges. Such schemes can represent a marketing opportunity and producers should be encouraged to understand the business benefits these can bring.

## **Policy and regulatory issues**

### **Complying with Legislation**

3.12 Complying with changing legislative requirements can be a challenge for many businesses, but perhaps particularly for smaller businesses that have less capacity to ensure procedures are up to date. There is an opportunity to support the industry through improved communication strategies, improved knowledge transfer of new technologies, and through improving the provision and uptake of continuing professional development.

The framework of pesticide regulations both in the EU and UK is a complex area where professional expert advice is often essential, but is sometimes out of reach for small scale producers. By encouraging producers to work collaboratively, ability to access these services can be enhanced.

3.13 The interpretation and enforcement of planning regulations in relation to protective structures for plant production is an area which needs a consistent approach throughout Wales, and clearer dissemination of information in relation to legal requirements.

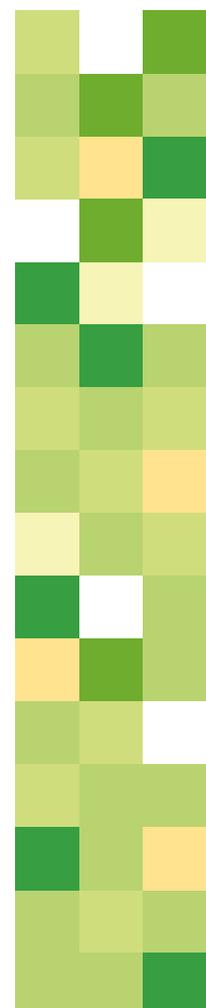
The industry needs to be encouraged to participate in consultation processes to influence the development of regulations and legislation wherever possible.

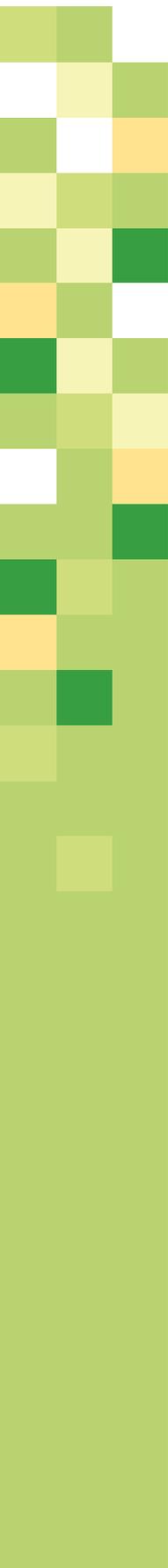
***To enhance the reputation of the industry the Welsh horticulture industry needs to be enabled to comply with existing and new legislative requirements and regulations in the most cost effective and timely way.***

***The Welsh horticulture industry needs to be able to plan for and cope with policy changes and to work in close partnership with Government on the introduction of new legislation and policy formation.***

### **Research and Development into new approaches**

3.14 Research and Development should be utilised to generate and disseminate new technological advancements to the industry. There is an on-going need for the Welsh Assembly Government and the industry to influence UK and European policy, strategy and research to ensure that it takes into account the needs of the industry in Wales and that the findings are disseminated effectively. This provides the opportunity to improve knowledge transfer, education and training within Wales. Again, the industry is encouraged to work in close partnership with government to identify priorities for research and development.





***Relevant market intelligence needs to be regularly communicated to the Welsh horticulture industry, in an easily accessible form. Increased awareness and utilisation of market information by the industry will enable businesses to better identify market opportunities.***

## **Education**

### **Education, training and knowledge transfer**

3.15 In order to improve the supply of suitably trained and qualified labour within the industry, there is a need to assess skills required by businesses and communicate this to training providers.

There is also a requirement to review the current education and training provision available to the industry and raise the profile of horticulture as a career opportunity. It is important to consider whether appropriate delivery mechanisms are in place to provide the skills and knowledge base to make Wales' horticulture truly sustainable. The industry and the Welsh Assembly Government also need to invest in skills development and the importance of this is reflected in the Welsh Assembly Government's Skills That Work for Wales Strategy and Action Plan.

***There is an ongoing need to improve efficiency of production to reduce costs and improve performance. The industry needs to consider opportunities for the future and adopt technical best practice and use benchmarking data when available. This will continue to be encouraged through initiatives such as the Farming Connect Knowledge Transfer Development Programmes.***

## **Physical Environmental issues**

### **Sustainability and climate change**

3.16 The Government of Wales' One Wales Agreement (2007) commits the Welsh Assembly Government to achieving annual greenhouse gas emission reductions of 3% per year from 2011.

Horticulture can play its part in reducing greenhouse gas emissions. This will not only be by direct management of horticultural systems, but also by the use of horticultural products in other sectors of the economy. The industry should take into consideration levels of carbon production when seeking to increase land area or business expansion. Opportunities exist now to gain benefits from alternative energy sources and to consider the creative use of waste heat.

3.17 There is a consensus that it is likely that Wales will experience more extreme and challenging weather events (especially strong winds and extremely heavy rainfall). There is likely to be an increased level of damage to crops and protective structures as well as plant diseases. That said there may well be opportunities to grow crops in Wales that are more usually found in warmer climates. The challenge here is to evaluate and disseminate information on the suitability of different varieties and species as the climate changes and to promote our advantages in the market place.

3.18 Wales has land available to expand its horticulture production area and could potentially increase the supply of products to meet consumer demands. Such increases could lead to land use change from grassland to crops/cultivated land which would result in greater carbon loss from soils, and subsequently higher levels of greenhouse gas emissions.

Significant expertise has now been developed in the use of plants to modify both high and low water flows and replacing impermeable surfaces in urban areas with living green surfaces (e.g. green roofs) provides a significant buffering capacity during high rainfall.

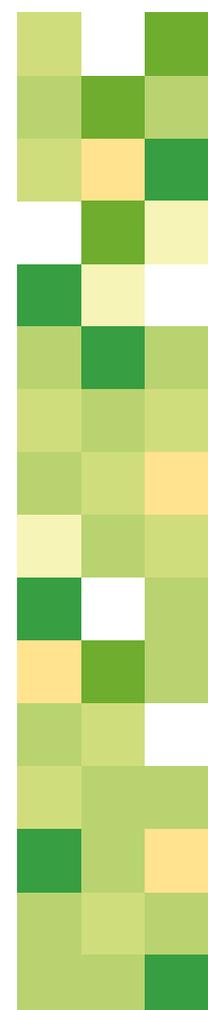
3.19 The Welsh Assembly Government launched a Farming Connect Development Programme for Climate Change in Wales which will seek to raise awareness of the issues and work with partners to develop practical and sustainable options to help land managers address climate change.

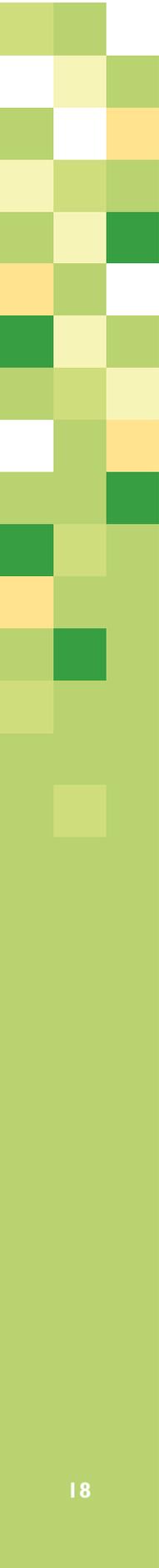
In recent years, developments in peat-free growing media have been complemented by an increase in research into composting. These two areas offer opportunities for further progress and development.

***The Welsh horticulture industry needs to be in a position to comply with climate change legislation in order to ensure that its contributions to Welsh Assembly Government and UK policy regarding climate change are maximised whilst ensuring continued economic sustainability. An opportunity exists now for the industry to adapt systems to mitigate the worst effects of climate change and to lessen the impact on the environment and to contribute more widely through sharing best practice.***

### **Resource & Waste Management**

3.20 The Welsh Assembly Government's Environment Strategy and its Action Plans aim to work in partnership with all sectors to achieve a better environment whilst using fewer resources.





Some of the key areas/issues which impact on the horticulture industry are:

- **Plastics** - There is a pressing need to continue development of alternative materials to petroleum based plastics, and to improve the utilisation of resources to minimise waste.
- **Water** - There are opportunities to improve awareness of efficient water resource management within a business' current operating system; and also to improve awareness of the costs and benefits of investing in differing water management solutions.
- **Phosphorous** - It is considered that whilst demand for phosphorous fertilizers is likely to remain static or increase, availability will decline resulting in price increases. This will present a challenge to all agricultural production systems including conventional horticulture.
- **Pesticides** - The current cool climate in Wales, combined with more effective production systems, allows the industry opportunities for a reduction in chemical inputs, as well as the need to adhere to new regulatory measures and targets. Longer term climate change may affect this.
- **Composting/Anaerobic Digestion** - There is scope to investigate further the use of composting and anaerobic digestion in elimination of waste and the production of renewable energy in order to seize opportunities to reduce carbon footprint where they arise.

***The Welsh horticulture industry needs to be in a position to respond to legislative Resource & Waste Management requirements and mitigate the industry's impact on the environment, and to work in partnership with Government on new policies. Best practice and knowledge transfer will be key in demonstrating benefits to the horticulture industry.***

## **Social/Community issues**

### **Effects on Consumer Demand**

3.21 There is increasing consumer interest in, and demand for, local food production, food safety, health and nutrition, the environment and secure food supply chains. The horticulture industry in Wales needs to ensure that it is demand-led and customer focussed whilst producing in a sustainable way. The Welsh Assembly Government Local Sourcing Action Plan (2009) gives details on ways in which much of this could be delivered.

The beneficial role of horticulture and horticultural produce in relation to health and welfare is now widely accepted and becoming embedded into policies and healthy eating advice. There are opportunities for Wales' horticulture industry to provide produce which fits in with this advice and to meet demand for products and services.

***The direct and wider benefits of consuming local, fresh and nutritional food, including fruit and vegetables need to be disseminated to consumers, promoting its contribution to individuals' health and well being.***

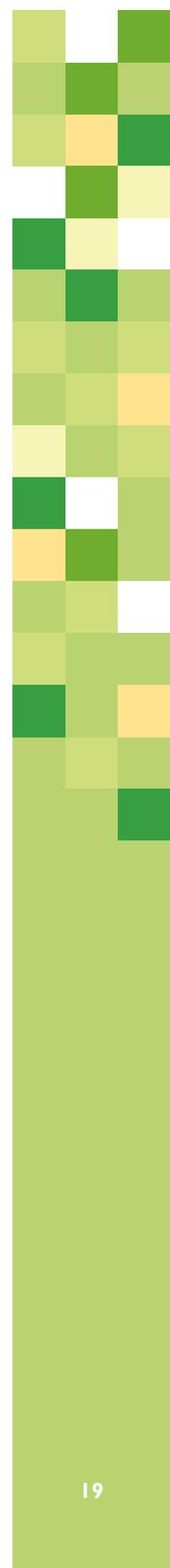
### **Community and urban horticulture**

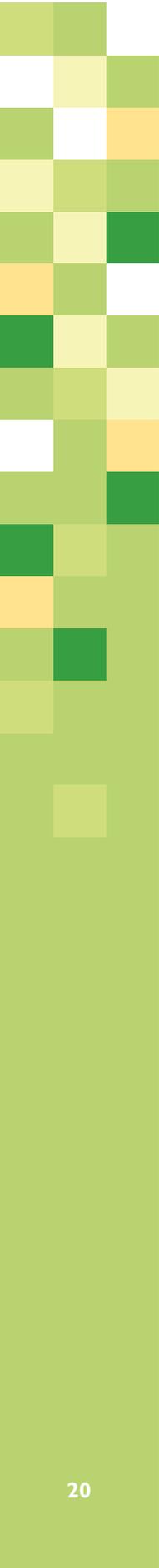
3.22 There is a strong base of community, rural and urban horticulture within Wales. With ever-increasing interest in this area, there are real opportunities to develop and address a number of issues that have the potential to benefit both society and the sector as a whole.

As this document has already highlighted, horticulture cuts across a range of themes. In the formation of policy and delivery of services, the challenge is for national and local government to make the connections between them.

Although the benefits of horticultural activities are well established, at present there is limited information on the scope of private and community activities within Wales and quantifying the contribution they make.

The benefit of horticultural initiatives in a social context is well documented. A key driver for many initiatives is the inclusion of sections of the community who have become, for whatever reason, marginalised. Whether this has occurred due to a disability, criminal offence, or social isolation, horticultural activities can act as a mechanism to bring communities and families together. Inclusion in such activities also provides





an opportunity for individuals to benefit from fresh fruit and vegetables, exercise from light cultivations, a place to see friends, meet new people and involve family members, whether young or old.

3.23 The wide appeal of horticultural activities provides the opportunity for the sector and government to reach a vast audience. Education is another key cross cutting theme. Not only in terms of fostering and developing horticultural skills, but also by providing a platform to raise awareness and understanding of other issues such as biodiversity, climate change, resource conservation, and the links between food production, processing and consumption. It can also offer the opportunity for children to engage key parts of the curriculum and reconnect with food issues in a fundamental way.

There are numerous examples of horticultural initiatives and best practice throughout Wales. The opportunity exists for community groups, industry and government to learn from them when developing successful future initiatives. Organisations leading the way are the Probation Service, Federation of City Farmers and Community Gardeners, Community Food Co-operative Programme, Local Authorities, National Trust, Royal Horticultural Society and the Welsh Assembly Government through the Local Environment Quality (LEQ) Improvement Fund, The Tidy Towns Scheme, Farming Connect and the Supply Chain Efficiency Scheme.

3.24 A barrier for some initiatives is the availability and cost of suitable land. Urban sites can often be contaminated or earmarked for development. The cost involved in cleaning up a site or purchasing it can be too expensive for many community groups to afford and unsuitable for local authorities to allocate as allotments. This presents an opportunity for producers to engage with community groups, promote the sector and develop a long-term skill base by leasing parcels of land to the community for horticultural activities.

***The introduction of local food and community food projects should be encouraged and supported, through Community First Partnerships in deprived areas.***

***The Welsh Assembly Government will work to develop proposals for action in discussion with the Welsh Local Government Association and the voluntary sector.***

## **Labour**

3.25 Recruitment and retention of suitably skilled and trained labour is a challenge in all areas of the horticulture industry, partly due to poor awareness of the variety of career opportunities the sector offers. There is both a challenge and an opportunity to raise the profile of horticulture and to encourage more people to choose horticulture as a career path and to find ways to develop and retain staff.

***New personnel to the Welsh horticulture industry need to be encouraged and existing personnel supported to ensure the entire supply-chain has access to a pool of skilled labour.***



## Chapter 4

# Objectives and Actions

This Action Plan will identify strategic aims, objectives and actions which will seek to address the challenges and take advantage of the opportunities facing the industry, identified in Chapter 3.

Listed below are the 4 strategic aims. Objectives and actions are identified to address each of these.

**Strategic Aim 1:** To improve the levels of understanding of market trends and inform consumer behaviour.

**Strategic Aim 2:** To improve supply chain linkages and foster innovation.

**Strategic Aim 3:** To improve the business performance of producers and processors in response to changing market conditions, environmental requirements and consumer demands.

**Strategic Aim 4:** To develop and improve agronomic and other technical skills to support horticulture in Wales.

These actions focus on the food and drink sector, however they will have resonance across the whole sector. These will be reviewed regularly and updated where necessary. Further actions may be identified and developed at a future date with the Horticulture Strategy Group. This Action Plan is to be delivered through partnership working between industry organisations/associations, the industry itself and the Welsh Assembly Government.

# Market Issues / Policy and Regulatory Issues

## Education, Research and Development

### Strategic Aim 1:

To improve the levels of understanding of market trends and inform consumer behaviour

Objective	Action	Partner Delivery Organisation	Milestones	Outcome
1. To improve the availability and use of relevant market intelligence and information on consumer trends to the industry	a) Identify market intelligence currently available and its relevance to Wales, identify research gaps and encourage and co-ordinate new research where required	Horticulture Wales SCE Project; WAG (FFMDD / TSD), Horticulture Strategy Group	Autumn 2010	Less duplication of effort and more targeted research, with implications of climate change considered
	b) Collate and summarise results of relevant market intelligence and technical research and develop suitable communication tools to proactively disseminate to the industry	Horticulture Wales SCE Project; WAG (FFMDD / TSD), Horticulture Strategy Group	Autumn 2010 On-going monitoring	Relevant market intelligence regularly communicated to the industry, in an easily accessible form. Increased awareness and utilisation of market information by the industry, enabling businesses to better identify market opportunities
	c) Investigate and identify the current and future markets for Welsh Horticultural produce and the horticultural products likely to show economic opportunities in the next 10-20 years, both within and outside Wales	Horticulture Wales SCE Project; WAG	Autumn 2010 On-going monitoring	Reports for each area identified on sales trends, market performance and retail behaviour - to be published with recommendations and updated as economic climates or product change. Planned investment by the industry is better informed

Objective	Action	Partner Delivery Organisation	Milestones	Outcome
2. To establish baseline data on the current scale, structure and value of the horticulture sector in Wales	<p>a) Develop a database of market and statistical information on the sector, to be updated regularly</p> <p>b) Develop and promote business directories for Horticulture in Wales</p>	<p>Horticulture Wales SCE Project; WAG (TSD / FMDD)</p> <p>WAG (FFMDD), Trade Associations, Horticulture Wales SCE Project; Horticulture Strategy Group</p>	<p>Annual On-going monitoring</p> <p>Spring 2011</p>	<p>Up to date information on all segments of the horticulture industry in Wales</p> <p>Improved signposting and increased customer awareness of businesses and products</p>
3. To promote the role of horticulture in nutrition and well-being to enhance consumer awareness of the health benefits horticulture can bring and its impact on the landscape of Wales	<p>a) Co-operate where appropriate in government initiatives and engage in policy development and consultations</p>	<p>WAG (FMDD / HID), Horticulture Wales SCE Project;</p>	<p>Spring 2011 On-going monitoring</p>	<p>Increased awareness and demand for produce</p>

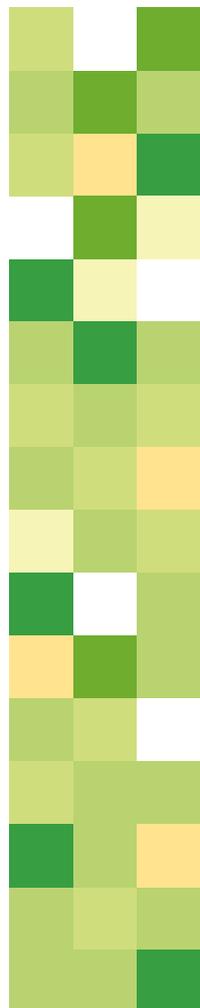
## Strategic Aim 2:

To improve supply chain linkages and foster innovation

Objective	Action	Partner Delivery Organisation	Milestones	Outcome
I. To improve supply chain linkages between producers, dependent industries and consumers	a) Establish closer links with key processors in Wales and facilitate communication between producers, processors, distributors and retailers	Horticulture Wales SCE Project; CALU, WAG (FFMDD/FC/D&ET), Food Centres, Trade Associations, Horticulture Strategy Group, Industry	Summer 2010 On-going monitoring	Improved vertical co-operation and collaborative working throughout the supply chain. Development of efficient supply chain networks  Improved understanding of respective issues, leading to more efficient and better managed raw material supply base
	b) Assess scope and mechanisms to provide baseline data and benchmark performance in supply chains	Horticulture Wales SCE Project;	Autumn 2010 On-going monitoring	Encourage development of business efficiency. Database of benchmarking criteria in supply chains
	c) Improve awareness of Wales' horticulture sectors amongst buyers & consumers	Horticulture Wales SCE Project; WAG (FFMDD /D&ET), Trade Associations, Horticulture Strategy Group, Industry	2010 On-going monitoring	Greater customer and consumer awareness of local horticultural products
	d) Providing networking and learning opportunities across the industry through Continual Professional Development and open events	Horticulture Wales SCE Project; Trade Associations, Sector Skills Council, WAG (FFMDD/FC), CALU	As required	More effective sharing of best practice across the industry and improved supply chain linkages

Objective	Action	Partner Delivery Organisation	Milestones	Outcome
2. To provide advice and support on new product development and adding value to existing products and services	a) Advise upon and foster new product development	Horticulture Wales SCE Project; WAG (Farming Connect / FMDD), CALU, Horticulture Strategy Group, Food Centres	2010 On-going monitoring	A range of support services available in line with industry needs to encourage and support innovation, new product development and added value
3. Raise awareness of research providers to facilitate support for improved horticultural products / processes	a) Develop a database of all research providers and available research. Encourage collaboration between key providers and disseminators b) Improve knowledge transfer from research providers c) Encourage research funders to support research which meets the needs of Wales' horticulture sector	WAG (TSD), Horticulture Wales SCE Project; Horticulture Strategy Group  WAG (FC / TSD / FFMDD), CALU, Horticulture Wales SCE Project;  WAG (TSD)	Spring 2011 On-going monitoring  2011 On-going monitoring  On-going	More impact from research and more efficient deployment of research funds Duplication of effort is minimised and knowledge transfer is maximised  Appropriate knowledge transfer  Research that meets the needs of the Welsh horticulture industry

Objective	Action	Partner Delivery Organisation	Milestones	Outcome
4. Encourage the procurement of Welsh fresh produce in public sector organisations	<p>a) Horticulture suppliers advised to register on <a href="http://sell2wales.co.uk">sell2wales.co.uk</a></p> <p>b) Encourage the development of short supply chains and collaborative activity from Welsh producers into the public sector</p> <p>c) Engage with local producers to encourage the utilisation of fresh fruit and vegetables which is unsuitable for retail markets into processing</p>	<p>Horticulture Wales SCE Project; CALU, WAG (Value Wales /FFMDD), Industry</p> <p>Horticulture Wales SCE Project; CALU, WAG (Value Wales / DE&amp;T/FFMDD), Industry</p> <p>WAG (FFMDD / Value Wales), Industry</p>	<p>Ongoing</p> <p>Summer 2010 On-going monitoring</p> <p>Ongoing</p>	<p>Greater uptake of Welsh produce in school and hospital meals</p> <p>Improved rural economy and regeneration</p> <p>Improved pupil health and patient recovery</p> <p>Increased public sector procurement of Welsh horticulture products</p> <p>Higher returns to producers and reduced food waste</p>
5. To increase the use of Welsh grown fresh produce in the tourism and hospitality industry	<p>a) Establish and encourage improved linkages between producers/suppliers and the hospitality and tourism sector and provide with information on the availability of local horticultural products</p>	<p>WAG (FFMDD / Visit Wales), Regional Tourism Partnerships, Axis 3&amp;4 RDP programmes, Horticulture Wales SCE Project; Industry</p>	<p>Winter 2011 On-going monitoring</p>	<p>Strengthened links between Welsh producers, wholesalers and tourism providers and increased use of fresh produce by the tourism sector</p>
6. To explore innovative mechanisms that encourage farmers to consider diversification into horticulture	<p>Investigate the potential merits of silva pastures and other alternative cropping patterns including community supported agriculture initiatives</p>	<p>WAG (FFMDD) TSD CPD. Farming Connect</p>	<p>Winter 2011 On-going</p>	<p>Strengthened diversification</p>



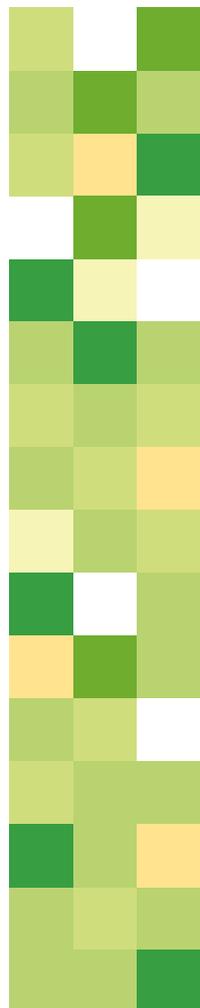
## Environmental / Education, Research and Development / Social & Community Issues

### Strategic Aim 3:

To improve the business performance of producers and processors in response to changing market conditions, environmental requirements and consumer demands

Objective	Action	Partner Delivery Organisation	Milestones	Outcome
I. To provide horticultural businesses with comprehensive integrated advice and guidance on business management	a) Collate and publicise information on schemes offering support to horticulture in Wales and encourage their uptake	Horticulture Wales SCE Project; WAG (Wales Rural Network/Farming Connect / FFMDD & DE&T), CALU	2010 On-going monitoring	Improved uptake of available funding
	b) Evaluate the effectiveness of the current Farming Connect service in meeting the needs of the horticulture sector	WAG (Farming Connect), Horticulture Strategy Group	October 2011	Continued development of Farming Connect service to meet the needs of the Horticulture Sector in Wales
	c) Support the development of collaborative ventures within Wales	Horticulture Wales SCE Project; WAG (FFMDD / Farming Connect), Wales Co-operative Centre	2010 On-going monitoring	Effective support for the development of collaborative working
	d) Explore potential benefits to the horticulture industry of the use of Machinery Rings	Machinery Rings, CALU, Horticulture Strategy Group	Industry On-going	Increased use of Machinery Rings by the horticulture industry
	e) Provide support and encouragement to Young Entrants	WAG (Farming Connect) & DE&T / FFMDD), Trade Associations, CALU, SSC	2010 On-going monitoring	Suitable business support initiative for entrants into the horticulture industry

Objective	Action	Partner Delivery Organisation	Milestones	Outcome
2. Provide trade development and marketing support to horticulture producers and processors	<p>a) Support businesses to identify trade opportunities and deliver appropriate support initiatives on supplying local markets and multiple retailers</p> <p>b) Encourage participation in and provide support for UK and international trade shows, missions and other events, e.g. meet the buyer</p> <p>c) Encourage greater involvement of horticultural businesses in Awards, e.g. True Taste of Wales and Regional and National landscape awards, UKS Skills Competitions</p>	<p>WAG (FFMDD / DE&amp;T), Horticulture Wales SCE Project;</p> <p>WAG (FFMDD / DE&amp;T), Horticulture Wales SCE Project; Horticulture Strategy Group</p> <p>WAG (FFMDD), CALU, Horticulture Wales SCE Project; Horticulture Strategy Group, Trade Associations, Sector Skills Councils, Industry</p>	<p>Summer 2010 On-going monitoring</p> <p>On-going monitoring</p> <p>On-going monitoring</p>	<p>Increase in trade. Participation in FFMDD supplier development programmes</p> <p>Improved relationship with the trade and the gaining of new business</p> <p>Increase in entries, increase in Awards won and greater PR benefit for the companies and the sector in Wales</p>



Objective	Action	Partner Delivery Organisation	Milestones	Outcome
3. To encourage the safe and sustainable production of horticultural produce and sustainable use of natural resources based on sound scientific evidence	<p>a) Evaluate the quality assurance schemes currently available to the Welsh Horticulture Industry and the feasibility of a pan-Wales scheme. Raise awareness as appropriate</p> <p>b) Raise the environmental and sustainability awareness of Welsh horticulture businesses by supporting a range of business improvement activities focused on pollution control, water management, waste and energy, waste audits, etc</p> <p>c) Maximise opportunities from the Rural Development Plan for development of the sector</p>	<p>Horticulture Wales SCE Project;</p> <p>Horticulture Wales SCE Project; OCW, CALU, Trade Associations, WAG (TSD / DESH), Environment Agency, Horticulture Strategy Group</p> <p>Horticulture Strategy Group, WAG</p>	<p>2010 On-going monitoring</p> <p>Winter 2011 On-going monitoring</p> <p>2010 - 2013 Review Winter 2012</p>	<p>Appropriate quality assurance schemes available for the industry</p> <p>Improved plant health, post-harvest quality and producer profitability</p> <p>Seminars and reports to disseminate advice resulting in increased sustainable efficiency of the horticulture supply chains, e.g. reduction of waste (food/energy/water). Improved efficiency of water and energy use. Increased number of environmental audits in the industry</p> <p>Most comprehensive range of support possible for the sector</p>

## Education, Research and Development / Environmental

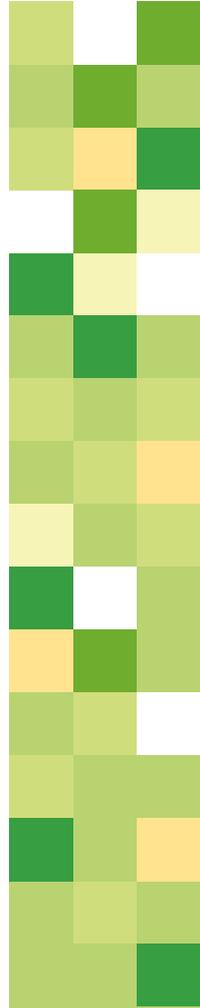
### Strategic Aim 4:

To develop and improve agronomic and other technical skills to support horticulture in Wales

Objective	Action	Partner Delivery Organisation	Milestones	Outcome
1. Provide accessible information on both formal and informal education and training opportunities relevant to horticulture available within Wales	a) Identify and evaluate existing education and training provision	Glyndwr University, WAG (DCELLS/ Farming Connect / FFMD/TSD), Lantra, CALU, Trade Associations, Horticulture Strategy Group	Spring 2011 On-going monitoring	Improved awareness and therefore uptake of education and training opportunities; improved supply of appropriately trained / qualified labour; improved business performance; improved health and safety
	b) Inform training providers of specific industry training needs	Sector Skills Council, WAG (DCELLS), Industry	Spring 2012	More appropriate and relevant training provided to meet the needs of the horticulture
	c) Communicate education and training opportunities available to the Industry	Lantra, WAG (DCELLS, Farming Connect, FFMD, TSD), CALU, Horticulture Wales SCE Project; OCW, Trade Associations, Horticulture Strategy Group, Glyndwr University	On-going monitoring	Improved industry awareness of education and training opportunities available

Objective	Action	Partner Delivery Organisation	Milestones	Outcome
2. Encourage the development of appropriate education and training for all horticultural sectors within Wales	a) Assess skills needs of businesses across the horticultural industry	WAG (DCELLS / Farming Connect / FFMD / TSD), Sector Skills Council, CALU, Horticulture Wales SCE Project; Trade Associations, Horticulture Strategy Group, Industry, Lantra	Winter 2011 On-going monitoring	Improved understanding of the skills needs of the horticulture industry
	b) Develop a career pathway within and across horticulture sectors in Wales	Glyndwr University, Sector Skills Council, WAG (DCELLS / Farming Connect / FFMD / TSD), CALU, Trade Associations, Horticulture Strategy Group, Industry, Lantra	Summer 2011 On-going monitoring	Provides information on career development and prospects, encourages skills retention and enables movement throughout the sector, therefore raising the profile of horticulture as a career path
	c) Encourage the development of apprenticeships and training/work experience schemes	Training Providers, Sector Skills Council, Industry, WAG (DCELLS), Trade Associations	Winter 2011 On-going monitoring	Apprenticeship schemes across the sector and recognised pathways to qualifications in horticulture
	d) Encourage flexible provision of education and training to meet individuals and business needs	WAG (DCELLS / Farming Connect / FFMD / TSD), Sector Skills Council, CALU, Glyndwr University, Trade Associations, Horticulture Strategy Group, Lantra	Spring 2012 On-going monitoring	Training delivered at accessible locations and times to meet requirements of industry, e.g. e-learning, local delivery, etc
	e) Encourage the development of a wide range practical horticultural skills	Sector Skills Council, WAG (DCELLS), training providers, Environmental Organisations, Trade Associations, Glyndwr University, Farming Connect, Lantra	On-going monitoring	Increased skills base of horticulture sector

Objective	Action	Partner Delivery Organisation	Milestones	Outcome
3. Establish effective links between industry and research	<ul style="list-style-type: none"> <li>a) Investigate practical opportunities for diversification into horticulture</li> <li>b) Explore scope for production benchmarking and gross margin analysis within horticulture sectors</li> <li>c) Provide advice on methods by which horticulture can contribute to greater carbon capture and other methods of climate change mitigation and adaptation</li> </ul>	<p>WAG (TSD / Farming Connect), CALU</p> <p>WAG (TSD), CALU</p> <p>WAG (Farming Connect - Climate Change Centre), CALU</p>	<p>Summer 2010 On-going monitoring</p> <p>Winter 2011 On-going monitoring</p> <p>Winter 2011 On-going monitoring</p>	<p>Opportunities identified to encourage sustainable business growth in Rural Wales. Database of information on suitable crop varieties and production methods</p> <p>Improved business performance</p> <p>Delivery of Farming Connect Climate Change Development programme to the horticulture sector</p>



## Chapter 5

# Implementation, monitoring and evaluation

The previous chapter set out the actions to be taken forward under this Action Plan in order to implement the strategic aims and realise the vision of ***a sustainable horticulture industry that benefits the people and environment of Wales.***

In order to achieve this vision, close working partnerships across the Welsh horticultural industry will be essential. Stakeholders across the industry, including growers, processors, wholesalers, retailers, trade associations, further and higher education and recognised training providers should all become part of this process.

The Welsh Assembly Government, in partnership with the Horticulture Strategy Group (HSG), is committed to supporting the development of the Welsh horticultural industry and will therefore be putting in place arrangements with the HSG for implementation, monitoring and evaluation of this Action Plan. The HSG will agree a framework for reporting and measuring progress, including measurement of the following:

- Uptake of formal and informal horticultural education and skills training schemes.
- Dissemination of research and development programmes, between industry and research.
- The extent of information share of new technologies.
- Collation and dissemination of baseline horticultural data specific to Wales.
- Dissemination of market intelligence and information on diversification opportunities.
- Products and services supplied to the public sector.
- Support of new product development.
- Improvement of supply chain linkages.

- Dissemination of best practice and advice on environmental issues.
- Development and uptake of Quality Assurance schemes.

The Welsh Assembly Government together with the HSG will review progress annually and use this information to continually update the Action Plan to ensure that it reflects future trends and developments in the industry.

The development of an ongoing dialogue between partner organisations and individuals as well as commitment to the goals of this Strategic Action Plan will ensure its effective and timely delivery.



# Annex I

## Agri-Food Partnership Horticulture Strategy Group Members

Name	Company
Mr Roger Hitchings	The Organic Research Centre Elm Farm
Mr Kevin Thomas	Lantra
Mr David Frost	ADAS
Mr David Lloyd	Food Centre
Julie Bowes	Agriculture & Environment Branch, Welsh Assembly Government
Daniel Bevan	Agriculture & Environment Branch, Welsh Assembly Government
Dr David Skydmore	Glyndwr University
Richard Lewis	Stubbins Marketing Ltd
Sara Fox	Creative Solutions for Micro-Enterprises, Lampeter University
Kerrin Buckler	Centre for Alternative Land Use
Martyn Gray	Food & Physical Activity Branch, Welsh Assembly Government
Maureen Howell	Food and Physical Activity Branch, Welsh Assembly Government

Name	Company
Sally Shiels	Glasu
Nick Bean	Springfield Fresh Produce (Manorbier) Ltd
Dr David Shaw	Henfaes Research Centre
Philip Allsopp	Phil the Pot
Jennie and Teifi Davies	Llwynhelyg Farm Shop
Mr Richard Arnold	Really Welsh Trading Co.
Mr David Johns	Peter Broughton Ltd
Rhian Nowell-Phillips	Farmers Union of Wales
Peter Howells	NFU Wales
Nick Shilton	Plant Health, Technical Services Division, Welsh Assembly Government
Huw Thomas	Puffin Produce Ltd.
Helen Eustace	Horticulture Wales, Glyndwr University Wrexham

## Annex 2

# Government & Industry Delivery Partners

### **Welsh Assembly Government**

The Action Plan outlines some cross divisional and cross-departmental working, Within the Welsh Assembly Government,

RA - Department for Rural Affairs

FFMDD - Food Fisheries and Market Development Division

DE&T - Department for the Economy and Transport

FDD - Farm Development Division

FC - Farming Connect

TSD - Technical Services Division

DESH - Department for Environment and Social Housing

HID - Health Improvement Division

DCELLS - Department for Children, Education, Lifelong Learning & Skills

Value Wales

Wales Rural Network

An annual review will be put in place following the launch to continually monitor the actions within the plan and their relevance to the industry as time goes on. This will give the opportunity for amendments, progress and developments to be recorded as and when they arise.

### **Farming Connect**

Provides one-to-one support, knowledge, expertise, training and advisory services, tailored to the needs of farmers. The Centre for Alternative Land Use (CALU), has been commissioned to deliver the Farming Connect Knowledge Transfer Development Programme for Land Management, on behalf of the Welsh Assembly Government.

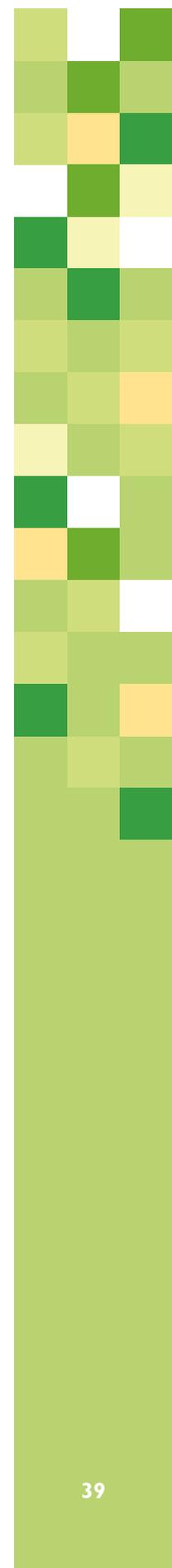
## **Horticulture Wales - developing horticulture supply chains**

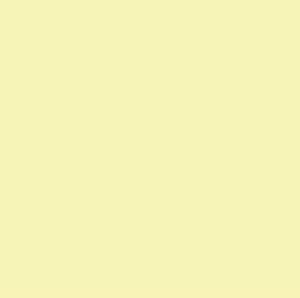
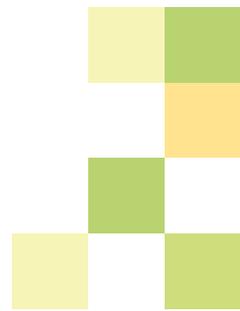
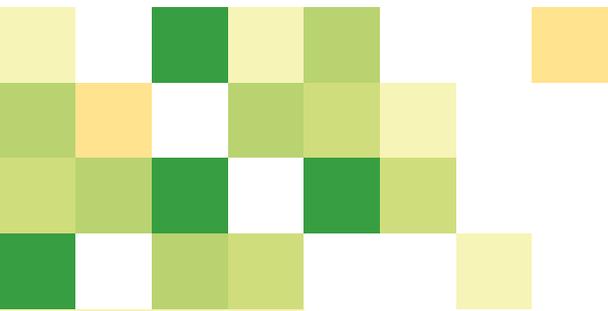
The Horticulture Sector in Wales has secured £1.64million from the Supply Chain Efficiencies (SCE) Scheme, approved as part of the Rural Development Plan for Wales. This programme, delivered by Glyndwr University will include the delivery of important market intelligence and development work will be delivered in partnership with the Horticulture Strategy Group and the wider industry to identify current and future markets, understand supply chain issues and examine ways of building Welsh horticulture capacity.

- To provide an efficient vertical supply chain in horticulture which will enable businesses to benefit from existing and emerging internal and external markets.
- To optimise the efficiency of horticulture supply chains by:
  - fostering co-operation
  - providing specialist advice on supply chain management.
- Facilitate the introduction of new products within the supply chain by:
  - providing market information
  - encouraging innovation.
- Foster the role of local communities and local suppliers in making significant contributions to supply chains.
- Encourage co-operation between supply chain elements in order to engage with multiple retailers.
- Encourage environmental best practice.

### **Lantra**

Lantra is the Sector Skills Council for environmental and land-based industries, licensed by UK Government to drive forward the skills, training and business development agenda for the 17 industries in the sector which include environmental conservation, horticulture, landscaping and sports turf and production horticulture.





## **Improve**

Improve is the Sector Skills Council for the Food and Drink Manufacturing Industry in the UK.

Their vision is 'World class skills for a world class sector'.