



Community Food Strategy Systems Mapping Study

Stakeholder Engagement Exercise

Welsh Government

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Community Food Strategy Systems Mapping Study

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Glossary

Glossary text

Acronym/Key word	Definition
BMJ	British Medical Journal
CFS	Community Food Strategy
CPIH	Consumer Price Index Housing
CSA	Community Supported Agriculture
CWRE	Careers and Work Related Experience
GVA	Gross Value Added
Ha	Hectares
HFSS	High in Fat, Sugar and Salt
MPs	Members of Parliament
NHS	National Health Service
ONS	Office National Statistics
PHW	Public Health Wales
SFP	Sustainable Food Places
SFS	Sustainable Farming Scheme
UN	United Nations
WBFGA	Wellbeing of Future Generations Act

Executive Summary

- i. Miller Research was commissioned in February 2023 to undertake a stakeholder engagement exercise around Welsh Government's 'Community Food Systems Map', designed to reflect an accurate, current understanding of the Community Food landscape in Wales.
- ii. This entailed holding a series of five longitudinal workshops with a nominal 'expert group', alongside an additional 9 workshops with wider stakeholder groups. In total, approximately 80 stakeholders were engaged as part of this research.
- iii. Stakeholders provided mixed feedback when first introduced to the map.
- iv. The majority of stakeholders could acknowledge the level of time and effort put into the mapping exercise. Many appreciated the comprehensive perspective it offered and recognised visual mapping as an effective tool for understanding complex systems. In this context, stakeholder praised the map's recognition of the wider relationship between food and society.
- v. Alongside their generally positive feedback, stakeholders also provided constructive criticism, aiming to enhance the map's accuracy and completeness. For instance, there was some concern expressed around the representation of relationships or feedback 'loops' in the Map.
- vi. The need for community food to be considered for its contribution to promoting biodiversity and reducing carbon emissions, was emphasised. Specifically, they were apprehensive about the intense focus on economics and agriculture, recognising that these factors have a minimal role in the current community food system (aside from contributing to surplus food).
- vii. Stakeholders also perceived a substantial structural divide between the 'community' represented on one side of the map and the influence of 'big retailers' on the other side.

- viii. The limitations of viewing the map as a current reflection of the community food system was also stressed.
- ix. In terms of identifying 'levers of change', the role of Welsh Government as an 'enabler' and facilitator of change was frequently referenced.
- x. This includes supporting existing groups and partnerships to build on their activities, alongside providing a leadership role, utilising its influence over Local Authorities to push forward action. Centrally coordinating fiscal support for community food was viewed as a key critical success factor.
- xi. The importance of integrating food strategies in the development of local development and wellbeing plans by PSBs and other organisations was highlighted.
- xii. Promotion of the health prevention and social prescribing agendas were also deemed crucial, as was revisiting the current subsidy system for small scale growing.
- xiii. To effectively deliver on the above, it is important there is a cross-governmental approach to guide further development of the Community Strategy.
- xiv. In light of this research exercise, Welsh Government now has the opportunity to capture the agenda around community food by demonstrating strong, ambitious and co-ordinated leadership, which has listened to the views of stakeholders contributing to studies such as this.

1. Introduction/Background

1.1 Miller Research was commissioned in February 2023 to undertake a stakeholder engagement exercise around Welsh Government's 'Community Food Systems Map', designed to reflect an accurate, current understanding of the Community Food landscape in Wales. The Community Food Strategy Systems Map (CFS map) was developed to support the Welsh Government's Programme for Government and Co-Operation Agreement's commitment to establishing a community food strategy in Wales.

Objectives of the Research

1.2 The stakeholder engagement exercise has provided an opportunity to explore and test perceptions of the CFS map with wider stakeholders connected to our food system in Wales. Primary aims for the research have been twofold:

- To gather stakeholder commentary about the systems map in terms of its completeness and accuracy, assessing whether it presents the issues related to community food as they understand them
- To gather stakeholder suggestions about what the policy solution might be to address the issues the map shows, and to engage stakeholders in 'co-design' of those solutions with Welsh Government

1.3 These activities were to be guided by an overarching goal, to establish viable routes for making community food initiatives more successful, and to help position them as a more prominent part of the food system in Wales.

Background to the Systems Map

1.4 Systems mapping has been identified as an increasingly favoured tool for policymakers attempting to solve 'wicked problems'. In terms of relevant use cases, the approach has been most commonly applied

by UK Government to develop climate policy¹, utilising the method to collaborate on net zero. Its ultimate purpose is to guide interventions in complex systems, making it an appropriate lens through which to explore community food in the context of the wider the food system.

- 1.5 Beyond the tool of systems mapping itself however, the notion of ‘Systems Thinking’ more broadly has underpinned the development of numerous Welsh Government strategic priority areas – highlighting the importance of recognising inter-connectivity when exploring policy changes. The Wellbeing of Future Generations Act may be the most obvious example of this, having applied the common thread of sustainability (social, environmental, economic) as a measure of accountability for our societal progress in Wales.
- 1.6 The issues facing our food system today fall somewhere between the distinctions of ‘complex’ and ‘chaotic’ in systems thinking terms, as they encompass multiple interactions between different structures and networks. When operating at this level of complexity, it can become intensely challenging to achieve any consensus around the ‘right answers’, although systems mapping can help us to understand more clearly the consequences of intervening. With this in mind, co-production and collaboration with stakeholders can become even more valuable.
- 1.7 In the context of climate change and related issues (such as food security) the complex can advance more rapidly towards the ‘chaotic’ meaning that as the ‘problem’ becomes more urgent, considerations around who is engaged in the conversation and decision-making process become more important.
- 1.8 To create the initial systems map, Welsh Government applied academic expertise² in building a foundational evidence base, which

¹ [Tools for climate policy: 2\) systems mapping - Policy Lab \(blog.gov.uk\)](https://blog.gov.uk/2019/02/20/tools-for-climate-policy-2-systems-mapping/)

² Dr Caroline Verfuert was involved in developing the first draft of the Community Food Systems Map as part of her Fellowship with the Welsh Government and took an advisory role throughout the project. She is a Research Associate in the Centre for Climate Change and Social Transformations (CAST) based at Cardiff University.

was complemented and further developed through 1:1 conversations with internal and external stakeholders involved in Community Food. It was also supported more widely by the results of consumer and stakeholder surveys which gathered early views on the development of the CFS in 2021/22.

How it works

- 1.9 Effective systems maps help us to better understand the relationships between the qualities and characteristics of a system, these can include its existing assets and the factors which have influence over them. The initial CFS map has been broadly organised around the groupings of 'elements' relating to 'people', 'economics', 'governance', 'community assets', and 'land'.
- 1.10 A successful systems map will help to make routes for intervention through policy more easily identifiable, as it should become obvious to recognise which factors are likely to be influenced by any given change.
- 1.11 If the map is intended (as in this case) to be used as a professional tool to aid policymaking, the quality of the information going in to it becomes central to its success. In short, the map can only be as effective as the knowledge and information underpinning it, and it must be well-structured (present a logical flow) in order to guide accurate interpretation.
- 1.12 When the systems mapping process is rushed or untested, it increases the risk that unintended negative consequences of policies and interventions are not adequately reflected. A good systems map must capture relationships accurately in order to highlight 'vicious cycles' which need to be disrupted – in order to create change.

About this report

- 1.13 This report presents the narrative discussion of the systems mapping stakeholder engagement exercise. The research exercise produced tangible recommendations for both adding new elements to the map to increase its level of accuracy in representing the community food system (section 5, table 1) as well as suggestions for alternative

lenses and structures which may help us to understand the community food landscape in Wales more effectively (section 6).

- 1.14 Much of the success around the initial iteration of the CFS map, however, has been captured through its ability to stimulate discussion and engagement across stakeholder groups.
- 1.15 Whilst groups demonstrated varying approaches in their interpretation of how the map should work, the consensus around some 80 stakeholders (see section 2) in terms of what community food means, what is achievable for the CFS, and what the core priorities are at this moment in time, has been quite remarkable.
- 1.16 For this reason, this report has endeavoured to document the rich level of discussion achieved throughout the exercise, providing a more detailed narrative around the issues of supply and demand of community food, the environment and climate change, food security, and health inequalities.
- 1.17 In terms of outputs, this full report complements a summary (pdf) document of the key findings, as well as an edited (duplicated) version of the initial CFS map, and a 'supply and demand' lens version of the map – these are currently in process of being finalised and are available through the 'Kumu' mapping software platform.
- 1.18 This report is structured as follows:
 - Section 1 – Introduction/background
 - Section 2 – Methodology
 - Section 3 – Defining Community Food
 - Section 4 – Community Food, supply & demand
 - Section 5 – Feedback on the map
 - Section 6 – Alternative models
 - Section 7 – Governance responsibilities and levers for change
 - Section 8 – CFS next steps

Relevance of this research

- 1.19 The need to strengthen production of food at the local level follows what has now become a significant period of long-term decline in food security for millions of households across the UK. This short section sets out contextual considerations to help aid understanding around the nature of feedback gathered through the study, at this particular moment in time.
- 1.20 Issues discussed here have all been echoed throughout the stakeholder engagement exercise, as community food initiatives have become inherently linked to efforts to address rising population inequalities and mitigation against absolute poverty.

Food poverty

- 1.21 The trajectory of food poverty and food insecurity in the UK can be traced alongside the impact of a fundamental shift in UK Government's approach to welfare policy. Following the financial crisis of 2008, the shift to austerity removed vital lifelines for many of the most vulnerable – resulting in a 5,000 per cent increase³ in emergency food provision between 2008-2018.
- 1.22 A significant study by Rachel Loopstra published in the BMJ confidently concluded that more food banks open in areas that bear the brunt of welfare cuts and where more people experience benefit sanctions⁴. The link between austerity measures in the UK and food poverty is such that it has been widely recognised by the BMJ, Human Rights Watch, and the UN Special Rapporteur⁵ on Extreme Poverty and Human Rights.

³ [Emergency food bank parcels increased 5000% in 10 years, new report shows \(inews.co.uk\)](#)

⁴ Jackson T. Austerity and the rise of food banks *BMJ* 2015

⁵ [Poverty in the UK: a look at the latest United Nations and Human Rights Watch reports – Policy in Practice](#)

- 1.23 The ongoing consequences of this, combined with stagnating wages, rising energy bills, and inflation, continue to impact the Welsh population now, with demand for emergency food in Wales hitting another record high in 2022. This is despite Trussell Trust distribution activity having already increased by 85 per cent since 2018 alone⁶. Our research across South Wales, alongside pre-pandemic reporting by the South Wales Food Poverty alliance⁷, and ongoing monitoring by the Food Foundation, demonstrates that food bank figures are in many ways just ‘the tip of the iceberg’ when investigating the issue. The vital work of community food providers in supporting food insecure households beyond emergency provision, is for the most part unmonitored, meaning that the true scale of food poverty far surpasses reported figures.
- 1.24 Amidst this backdrop, it is clear that policymakers in Wales face a monumental challenge in supporting community food. Whilst we lack the power to address the complex structural issues under-pinning the scale of food poverty, our current context forces a more honest look at the flaws of our collective food system.

Food price inflation

- 1.25 At the time of writing in 2023, food inflation also stands at a record high (19.1% - CPIH), having now taken centre stage as the biggest contributor to overall inflation⁸. In real terms, methods such as the Food Foundation’s ‘basic basket’ price tracker reflects a price increase of 24-27% since April 2022. Reporting on supermarket actions such as lowering prices of selected essential products shows that this is yet to have ‘any substantial impact’ on the cost of a weekly shop.
- 1.26 The consequences of these increases are a marked decrease in dietary choice, for many households. The shrinking of household

⁶ [Cost of Living: Emergency food parcel demand at record high - BBC News](#)

⁷ [SWFPA Food Poverty A Call to Action Feb 2019.pdf \(sustainweb.org\)](#)

⁸ [Food Prices Tracker: May 2023 | Food Foundation](#)

budgets combined with higher prices means that people are using microwaves more to prepare food, in efforts to conserve energy⁹. These shifts in consumer behaviour can also have devastating effects on local economies, as households are forced to make less ethical choices – turning away from local suppliers so that budgets can be managed more effectively. Even for more ‘comfortable’ households, these consequences are passed on to the local economy through choices to eat out less¹⁰, contributing to further strain on the hospitality industry.

- 1.27 Consumer groups such as Which? have called for urgent action to help mitigate against rising prices, such as increasing the availability of ‘essentials’ ranges (including in smaller stores) and more promotions for healthy food options¹¹. Without immediate action, these compounding factors present a significant risk of a prolonged population divide, between those who have access to a balanced diet, and those who are forced to become primarily reliant on processed, long-life foods.

Vicious cycles for population health

- 1.28 In the UK, there are important questions around the role and ownership of supermarkets and food processors at the centre of our food system. The “big four” supermarkets and leading discounters dominate the grocery market in the UK, with Tesco alone holding 27 per cent of the market¹², whilst the five largest food manufacturers have a joint turnover of £30bn annually and the fast food sector is dominated by US companies with their associated food model. A recent UK Government funded report from the University of Oxford¹³ states that:

⁹ [Sunday roasts dwindle as cost of cooking crisis hits home | UK cost of living crisis | The Guardian](#)

¹⁰ <https://www.hubbub.org.uk/Blog/the-cost-of-living-squeeze-is-changing-nations-eating-and-food-shopping-habits>

¹¹ [No point in food price measures without targeting small stores, Which? warns | UK cost of living crisis | The Guardian](#)

¹² <https://www.statista.com/statistics/280208/grocery-market-share-in-the-united-kingdom-uk/>

¹³ <https://www.eci.ox.ac.uk/research/food/downloads/Mapping-the-UK-food-system-digital.pdf>

“Although there are enormous economic benefits from the UK food system, it faces multiple challenges. Diets too rich in fat, sugar, and meat and too low in fruit and vegetables are contributing to obesity and related health problems, especially in deprived households. Unsustainable production methods are driving biodiversity loss, soil degradation, pollution, water scarcity and climate change in both the UK and overseas. Poor working conditions persist, especially for low-skilled labour in the food sector.”

- 1.29 The consequences of poor diets and malnutrition at the population level are severe and can be understood perhaps most impactfully when translated into costs for the NHS. The NHS confederation has compiled a selection of alarming trends relating to diet and public health in Wales¹⁴, with headline findings demonstrating that the full social cost to obesity in Wales is around £3bn annually (Frontier Economics). Meanwhile, malnutrition is estimated to cost us £1.1bn (ONS) whilst health inequalities are projected to come at a direct cost to the Welsh NHS of £322 million annually (PHW).
- 1.30 Whilst the true cost of eating healthily is known to be a contentious topic, the Food Foundation’s findings show that healthy nutritious food is nearly three times more expensive than obesogenic unhealthy products, particularly when looking at calorie equivalents. It’s reported that healthy food items can cost an average of £8.51 per 1,000 calories, compared to just £3.25 per 1,000 calories for less healthy foods¹⁵. Moreover, a 5.1 per cent price increase was documented for healthier foods between 2021 and 2022, reflecting a significant access barrier for low-income households. Meanwhile, the branding and marketing of food from many major retailers has been ruled as disingenuous and misleading by experts¹⁶, undermining our collective ability to make healthy and informed food choices.

¹⁴ [60 per cent of people in Wales say their health has worsened due to rising cost of living | NHS Confederation](#)

¹⁵ [The Food Foundation report highlights impact of Britain's food policy disaster - Nuffield Foundation](#)

¹⁶ [The Broken Plate 2023 | Food Foundation](#)

- 1.31 To achieve calorie content (quantity over quality) nutrition experts have observed that the proportion of calories derived from ultra-processed foods by older children (11+) and adults, now stands at a soaring 56 per cent¹⁷. Public health and nutrition professionals continue to warn that prolonged inadequate nutrition negatively impacts health outcomes including children’s dental decay, growth, weight, population life expectancy, and diabetes-related amputations (ONS, NHS Digital)¹⁸.
- 1.32 The economic context (outlined above) presents significant challenges to households seeking a more sustainable diet. Whilst the (UK wide) Family Resources Survey concludes that the most deprived fifth of the population would need to spend 50 per cent of their disposable income on food to meet the cost of the Government recommended healthy diet¹⁹, the Bevan Foundation highlights that in the 45 per cent of households in Wales never have enough money for anything beyond the basics²⁰.
- 1.33 These factors make it increasingly likely that changes in diet and nutrition, and in turn public health outcomes, will not occur without targeted interventions within our food system.

Food production landscape

- 1.34 Whilst the evidence presented here sets out a clear need for accessible and affordable fresh food produce, the horticulture sector has failed to receive tangible support at the UK level. This year, UK Government has dropped its commitment to a horticulture strategy as part of its overall food strategy – despite its stated intention to support a healthier and more sustainable food system ‘affordable to all’. The strategy has been widely criticised for lacking ambition to achieve

¹⁷ Madrugá, M., Martínez Steele, E. et al. (2022). Trends in food consumption according to the degree of food processing among the UK population over 11 years. *British Journal of Nutrition*.

¹⁸ [National Diabetes Audit \(NDA\) 2022-23 quarterly report for England, Integrated Care Board \(ICB\), Primary Care Network \(PCN\) and GP practice - NDRS \(digital.nhs.uk\)](#)

¹⁹ FoodDB, University of Oxford; London School of Hygiene & Tropical Medicine secondary analysis of the Family Resources Survey 2021-22

²⁰ [A snapshot of poverty in Summer 2022 - Bevan Foundation](#)

transformative change²¹ and organisations such as Sustain have framed the decision as a ‘disappointing’ U-turn.

- 1.35 The community food strategy for Wales therefore presents a unique opportunity through which Welsh Government is well-positioned to strengthen its commitment to small-scale horticulture. With several studies of note having tested the feasibility of ecological small holdings²², it is clear that utilising our green spaces for regenerative (not extractive) farming, can offer a multitude of local economy and community benefits²³.

Climate anxiety

- 1.36 Despite the significant constraints on consumer choices discussed throughout this report, it is equally important to highlight that the compounding risk of climate change has also made citizens more willing to recognise the role of local food and easing reliance on imports.
- 1.37 Recent polls show that more than two third of the British public are worried about climate change and its effects (67 per cent) and that 55 per cent say they would be willing to only eat food that has been produced in the UK²⁴. Whilst we must be cautious about generalising this too broadly, it supports a general trend that localising our food consumption is perceived to be one of the more achievable individual actions which can be taken to combat climate change, despite the individual sacrifices in terms of choice that this implies.

Opportunities

- 1.38 This commentary on recent evidence provides important context to the climate in which this research has been undertaken, drawing attention to the primary issues which the community food strategy may seek to address. The systemic, inter-connected nature of the

²¹ Doherty, B., Jackson, P., Poppy, G.M. *et al.* UK government food strategy lacks ambition to achieve transformative food system change. *Nat Food* **3**, 481–482 (2022).

²² [Business Plan 2017-2020 new branding \(ecologicalland.coop\)](#)

²³ [MergedFile \(landworkersalliance.org.uk\)](#)

²⁴ [Most people are worried about climate change – but what are they willing to do about it? | YouGov](#)

issues at hand also exacerbate the need for the systems map supporting the strategy to provide clarity, within a landscape which is incredibly complex.

- 1.39 To be successful, the systems map must indicate a route for harnessing the assets of the Welsh community food system (the wealth of community initiatives and volunteers underpinning it), whilst recognising the current flaws in the nature of its supply.
- 1.40 At present, what we understand as our community food system is not sustainable because it was not designed to be. Community food growing has largely operated on the fringes of the industrial food system in well-established communities, whilst community food provision has propelled in a reactive sense due to food poverty and crisis. However, there is a real opportunity to address both food insecurity and food well-being through community food initiatives²⁵.
- 1.41 What systems thinking must stimulate here, is a more strategic approach to break down the divide between community food initiatives who have access to growing, and those who are currently limited to facilitating procurement and distribution.

²⁵ Verfuert, C., Bellamy, A. S., Adlerova, B., & Dutton, A. (2023). Building relationships back into the food system: Addressing food insecurity and food well-being. *Frontiers in Sustainable Food Systems*, 7. [doi: 10.3389/fsufs.2023.1218299](https://doi.org/10.3389/fsufs.2023.1218299).

2. Methodology

- 2.1 Prior to beginning stakeholder engagement, it was necessary to digest and review the map internally in order to highlight any areas that may have needed clarification. This resulted in a small number of edits and the addition of some key factors such as 'Climate Change'. It was also decided to centre the 'Wellbeing of Future Generations Act' as a central point within the map, as this allowed a clear correlation between policy and current factors within the food system.
- 2.2 Following on from an internal testing of the map, the stakeholder engagement exercise was undertaken through a series of virtual workshops between April 2023, with final discussion ongoing until 27th June – to capture insights of those who were under-represented in the research. The key stakeholder activities were as follows:
- Longitudinal expert group workshops (x5)
 - Wider Stakeholder group workshops (x9)
 - Number of Overall Stakeholders engaged with (approx. 80)

Key Stakeholders

- Sustainable Food Places – standalone group for SFP officers across Wales
- Third Sector Food Stakeholders (strongest engagement)
- Environmental Stakeholders
- Volunteers and Food Activists
- Public Sector Procurement
- Private Sector Stakeholders (weakest engagement)
- Welsh Government Strategic Stakeholders

Organisations engaged with

- Sustainable Food Places
- Social Farms and Gardens
- Food Sense Wales
- Health Boards (various)

- Food banks (various)
- Bangor University
- Mentor Mon
- Wrexham Incredible Edible
- United Response
- Land Workers Alliance
- Monmouthshire Food Partnership
- Carmarthenshire Council
- Our Food 1200
- PATCH
- Planed
- WWF Cymru
- Open Food Network
- FareShare
- Country Land and Business Association
- Can Cook/Well Fed
- Together Creating Communities (TCC, N Wales)
- The Soil Association
- Natural Resources Wales
- Ty Krishna Cymru
- Green Soul Urban Garden
- Grow Cardiff

Phase One

- 2.3 Due to the complex and high-level nature of the map, the expert group of stakeholders was invited to five different workshops which were divided thematically. This allowed stakeholders to take the time to further understand the map and to offer meaningful reflections on the key issues and themes raised in the map.

Phase Two

- 2.4 The next phase of testing the map took place with a wider group of stakeholders. This included those who working within food-based organisations such as food banks, environmental groups, food

producers and growers, individuals working within policy and volunteers. The purpose of these workshops was to gather feedback and response from those 'working on the ground' and to ensure a range of voices had an opportunity to comment and reflect on the map. These wider stakeholder workshops were divided by sector rather than theme, which allowed for nuanced and detailed discussions.

- 2.5 It was necessary to consider the accessibility of the map and to acknowledge who the intended audience was. Stakeholders all had varying levels of knowledge to engage with the map, leading to nuanced discussions within each workshop.
- 2.6 Although stakeholders were generally eager to engage in fieldwork, there was a lack of interest from those working in the private sector and Farmer's Unions. Several recruitment attempts were made however there seemed to be a level of disinterest in engaging with the map.
- 2.7 The findings and observations of both the expert and wider stakeholder groups are further explored in sections 4 and 5.

3. Defining Community Food

- 3.1 Before entering discussions around the challenges and opportunities surrounding community food it is important to have a shared understanding and definition of what is exactly meant by the term 'community food'. This helps clarify the scale on which it exists, which actors does interact with community food, as well as relevant initiatives. It also raises the question of what external factors are situated outside of community food but nonetheless have a significant impact on it.
- 3.2 Therefore, as part of our engagement exercise with stakeholders, we asked various groups to define their understanding of the term community food. The following section outlines the findings from those discussions.
- 3.3 The most commonly referenced and simple definition of community food offered by a range of stakeholders was 'food produced for the community, by the community'. This reinforces its supply and demand nature which is explored further in subsequent sections.
- 3.4 The production of food in the community was seen as needing to contribute to a just, connected and prosperous food system. The existence of organic, local and seasonal produce was seen as crucial in forming relationships between consumers, produce and the land.
- 3.5 Stakeholders expressed the importance of recognising the 'human' element to community food. Specifically, its function of serving the needs of the community, with a 'gathering and sharing' component in its distribution.
- 3.6 Its existence as a non-exploitative model was emphasised, with people being intrinsically linked to the natural environment, contributing positively to biodiversity. Some stakeholders also felt community food should be non-extractive, economically, reinvesting any profits back into community projects and initiatives. It should be set at a 'fair price', with low food miles.

- 3.7 Beyond these economic and environmental considerations, stakeholders claimed Community Food has a social function as well. This entails tackling issues such as food poverty and insecurity by increasing the access of local food. Furthermore, the nutrient dense properties of food produced in the community were seen as contributing to the health prevention agenda.

Characteristics of a successful community food strategy

- 3.8 Building on the definitions provided, stakeholders also provided further commentary on the values and characteristics that a CFS should be able to offer. The common understanding and collective support for suggestions here provides confidence that the CFS can be considered in many ways as a shared vision.
- 3.9 Recurring comments are presented below, with the intention of supporting policymakers to understand what targeted interventions in the food system should achieve:
- The sharing of surplus food and creation of abundance – whilst it's important that surplus food is shared at present, in the long-term we should be aiming to avoid the potential for waste and instead ensure that access to food is more equitable
 - Ensuring that everyone has access to land for growing – everyone should have some access to growing, even in a shared/group capacity
 - Communities should be better linked with their local farms – people should know where their food is coming from, and have the opportunity to support with growing as well as sharing knowledge
 - Ensuring that different sectors work together in partnership – as a common need which has relevance to us all, a sustainable food system should be seen as an over-arching goal for all of us
 - The Welsh Government and Local Authorities should lead by example by procuring food responsibly (and communicating progress in this space)

- A CFS should support a wider goal of working towards Food Justice, strengthening our Fairtrade status in Wales
- It should provide and support opportunities for community cohesion through socialising around food-related activities (growing, cooking, volunteering at and participating in community meals)
- It must align with the WFGA to ensure that the focus reaches beyond the production of food – so that wider wellbeing and social benefits can be achieved too
- It must prioritise soil health and the land over profits – in turn it must avoid seeing food as a commodity and instead view it as a foundation for supporting environmental and social sustainability
- The public sector must provide a ‘route in’ to Community Food, not just through procurement – but also through the deliberate use of public land (on schools, care homes, hospitals) for the purpose of growing
- Further to this, it should be holistic and ‘normalised’ – to the extent that housing developments and private land owners are willing/expected to contribute to the wider social and environmental aspirations of Community Food

3.10 Discussing the above criteria through which a successful CFS could be measured, has been an important enabler when encouraging stakeholders to consider what should be included in the parameters of the systems map. For most, this prompted reflections around the map in its ‘current’ form (reflecting our present reality) – discussed further in section 5.

3.11 It should be noted that these wider considerations, beyond the immediate benefits of increasing sales of ‘local food’ arose for stakeholders unprompted, highlighting the level of interest in environmental, social, and community benefits across all stakeholder groups.

4. Community Food: Issues around supply and demand

- 4.1 Over the course of our Expert Group workshops, a significant disjoint between the supply and demand of Community Food was raised by stakeholders. The provision of community food, in the majority of cases, is not a linear process – further emphasising the importance of definitions which view the CFS's role in supporting food for the community, produced by the community. In order to truly recognise the leverage points for increasing community food provision, it's therefore important that the CFS systems map is able to accurately reflect where Community Food is coming from, and what's blocking its expansion.
- 4.2 To provide more detail, stakeholders were asked to consider some of the main barriers and challenges to developing both the supply of, and demand for, community food in Wales.

Barriers to community food production

Access to land

- 4.3 Issues around access to land were possibly the main challenges facing potential growers. These included:
- The cost of land for growing. Growers typically require small parcels of land up to 2ha and so have to compete with a range of amenity uses such as garden extensions or equine use which place a significant premium on the price above agricultural rates. Small pockets of land are under pressure from alternative uses such as housing or tree planting schemes.
 - Increasing attractiveness of small farms for residential use. Growers looking to purchase small farms can be disadvantaged by the residential value of the farmhouse increasing the price of the overall holding to non-viable levels.
 - Difficulties of leasing. Landowners are said to be reluctant to release small parcels of agricultural land for horticulture, partially for practical reasons such as legal, planning and tax implications,

but also cultural fear of growers causing problems with neighbours or making sites look untidy. Growers pointed out the need for long leases to justify investment in infrastructure and soil fertility and this was an issue for many landowners. One stakeholder, however, felt that some larger estates were beginning to look favourably on applications for small parcels of horticultural land and also suggested that there were substantial numbers of walled gardens in Wales which could be used effectively.

- Planning issues. Growers reported extensive difficulties in securing planning permission for farm business infrastructure or for temporary accommodation. Farmers need to own or lease 5ha of land in order to be eligible for permitted development rights for buildings and extensions and few horticultural holdings are of this scale. Challenges faced with obtaining planning included long waits for applications to be processed, hostility from local planning officers and the cost of appeals. Some consultees had attempted to use One Planet Development legislation to secure planning permission but had found this to be extremely bureaucratic and complex to the point of giving up.
- At community level, the shortage of allotments was reported to be a problem, with waiting lists of several years in some areas.

Farm Subsidies

- 4.4 Although aware of forthcoming changes for farming support systems in favour of funding public goods, a common thread amongst stakeholders was the disparity between the subsidy provided to livestock and arable farmers and the absence of support for small scale horticulture. It was widely felt that this created a distortion in the market and was an additional challenge to growers who needed to invest in buildings and equipment. A particular issue was the proposed minimum holding size of three hectares to qualify for support, when growing organisations report that a holding of less than one hectare is both common and profitable in regenerative horticulture.

- 4.5 The lack of subsidy can also make it harder to small scale growers to compete on price against food grown under a subsidised system.

Attitudes to organic production

- 4.6 It was suggested that Welsh Government is not sufficiently engaged with organic production, despite its enhanced value through providing climate solutions and biodiversity improvements.
- 4.7 Small horticultural producers pay organic certification fees comparable to a small farm, which is an additional financial burden to the sector. It was suggested that the SFS does not cover organic maintenance payment, even for those who qualify for support.
- 4.8 Larger landowners were said to have mixed attitudes towards organic farming, as it was perceived to be harder to maintain profit margins under an organic regime. This was felt to make landowners reluctant to embrace the idea of tenants converting land to organic for growing.

Collaboration

- 4.9 It was acknowledged by growers that a mix of small scale and field scale production is necessary to scale community food supply. This will require better collaboration between growers and farmers, to ensure the supply of crops such as leeks and potatoes. This is a potential opportunity for support under the collaborative farming element of the proposed Sustainable Farming Scheme.

Skills and labour

- 4.10 There is currently said to be strong demand for land to establish growing businesses. However, it was agreed that there is a shortage of trained labour, and many growers rely on volunteers to support their enterprise, especially at harvest time. This was seen as a barrier to scaling the sector.
- 4.11 Specific skills issues included skills around permaculture growing, composting, plant nursery skills and soil health.

Market conditions

- 4.12 Several stakeholders raised the issue of the current market and distribution network for food being dominated by a small number of large players; both retailers and processors. Whilst large retail offers globally sourced goods and the convenience of choice under one roof, this can make it difficult for community growers to compete. At a time of food poverty and cost of living crisis, it is difficult for people to support community growers when food is considered cheaper in supermarkets because of sourcing policies and economies of scale.
- 4.13 A different perspective on this issue was raised in discussions, with participants feeling that supermarkets' primary responsibility to shareholders posed a risk of environmental considerations being a low priority in relation to the sourcing of products.

Production benefits

- 4.14 Growers and other stakeholders proposed a wide range of benefits of community food production. These centred on the availability of fresh, healthy food grown and consumed within a local area and the associated health and community cohesion benefits that this can bring.
- 4.15 Other advantages included;
- The highly productive use of land in small scale horticulture.
 - The benefits of short supply chains with regard to both maintaining food security and building community through the direct grower-consumer relationship.
 - The environmental benefits of regenerative horticulture with local distribution. These include the low carbon footprint of production and distribution, as well as benefits to biodiversity from nature-friendly production methods.
 - Opportunities for volunteering and links to social prescribing. Becoming involved in growing is acknowledged to be beneficial to wellbeing, although this was not always acknowledged by health professionals.

- The role of allotments was raised by stakeholders, as a means of families feeding themselves and neighbours without the perception of being “alternative”. This is particularly important in more traditional working class communities or amongst some ethnic minority groups.
- 4.16 The issue of scaling small scale horticulture was frequently raised by stakeholders and some growers felt that this could be best achieved through networking and collaboration, rather than growing individual businesses to farm scale.

Barriers to consumption of community food

- 4.17 Perceptions of community food are a major barrier to increasing consumption, with a widespread view of locally produced, and especially organic, produce as expensive. Stakeholders felt that there was a danger that local food is seen as a luxury, despite its environmental benefits and contribution to community.
- 4.18 This is amplified to some extent by a lack of clarity over what makes a sustainable diet, with no single view of what that might comprise. Whilst it is widely agreed that fresh produce is healthy and nutritious, there is no agreement that local is necessarily better – if for example red peppers can be grown with less intervention in a warmer climate abroad. This can lead to mixed messages for consumers, which can discourage them from buying locally.
- 4.19 For some consumers, the prospect of buying raw, unprocessed ingredients is too great a challenge, given constraints of time and budget and the uncertainty of the true cost of cooking at a time of very high energy prices. For some consumers, HFSS takeaway foods provide a level of certainty that allows them to budget for feeding a family.
- 4.20 The dominance of the supermarket model encourages consumers to buy from a single source. Hence, the cultural / behavioural change needed to buy seasonal produce from community sources, whilst still sourcing other goods from the supermarket, requires a level of

commitment which can be difficult to achieve. The introduction of food hubs has made steps towards addressing this issue, but stakeholders agree that the healthiest, least carbon intensive organic food remains the least accessible to consumers.

- 4.21 There is also a substantial divide to be noted between interpretations of ‘local food’ and ‘community food’. Local food is often associated with farmer’s markets, independent retailers, and organic veg/recipe box schemes, sold at a premium price to reflect their local origin.
- 4.22 Community food, however, is associated far more widely with food waste and free food distributed through food banks and has developed negative connotations through the social stigma of receiving charity. According to the Trussell Trust²⁶, their network alone distributed almost 3 million emergency food parcels in the year to end of March 2023, with an increasing proportion of working people amongst recipients.
- 4.23 Stakeholders stressed that there is work to be done to challenge perceptions around surplus food, to better value the range of efforts to make our food go further. Community pantries and food hubs play a significant role here in providing subsidised membership models, which help to remove the stigma of the ‘food bank’, provide more dignity to community food recipients – and help community organisations to run their services more effectively.
- 4.24 Overall it is agreed that work remains to be done to make community food an “easy option” to match the convenience of major retailers, and to normalise its role beyond exclusive association with those ‘in need’.

Benefits of consumption of community food

- 4.25 Stakeholders involved in community food stressed a range of benefits to both community and individuals through engaging with local food supply:

²⁶ <https://www.trusselltrust.org/news-and-blog/latest-stats/end-year-stats/>

- Community cohesion and confidence. By engaging with local growing as consumers or volunteers, community members can develop a relationship with growers and with each other. Some growers hold open days and community meals, which both contribute towards more vibrant communities and can develop community capacity to learn about food, cooking and nutrition. Through this, projects can build the mental capacity of people to manage their own lives more effectively (healthy eating etc) and make positive decisions about diet and nutrition.
- Contribution to the foundational economy of building short supply chains around small scale horticulture. Whereas the majority of food businesses are shareholder focused (and may be foreign owned), community growers are likely to employ local people, buy inputs locally and retain/invest profits in the community. This can build community wealth and prevent leakage of income out of Wales.

4.26 Members / supporters of CSA schemes provide a good example of where consumers can literally buy into the model for growing locally. Many of these will take on aspects of volunteering with harvesting, planting or distribution as well as buying produce.

4.27 In addition to this, the social wealth of existing food hubs, clubs, and community pantries across Wales which employ a membership model, are all existing assets from which we can build. These spaces are already normalising the notion of ‘paying in’ to subsidise the procurement of food, and the move to explore a greater variety of membership models²⁷ (which can also support growing activities) will now feel like a natural next step for many.

Community Food Initiatives

4.28 In addition to the supply and demand of community food, there is a wide range of social initiatives which may use food as a means of

²⁷ Verfuert, C. & Sanderson Bellamy, A. (2022). [Accessible Veg: A pilot project exploring the barriers and benefits to CSA memberships for food-insecure households.](#)

engagement, or which provide food in support of addressing social inequality, for example. Obvious examples of the latter would be food banks and community fridges, but also encompass food co-operatives and community cafes.

- 4.29 Stakeholders brought up some good examples of community food initiatives, such as Big Bocs Bwyd – a schools-based initiative with resources in a shipping container, which provides local food at “pay as you feel” prices and a range of learning experiences to engage children and parents in food issues, growing and cooking.
- 4.30 However, it was pointed out that such initiatives are ad hoc and lie outside of any co-ordinated strategy, with no framework for funding or a central support system. One Community Food provider explained that their organisation had supported a similar scheme locally, however prices had now increased (beyond its more affordable starting point) meaning that their group had to cancel membership.
- 4.31 Similarly, social prescribing can link people with physical or mental health conditions to community food projects, as a means of engaging them, building confidence and restoring health. The true value of this, however, is not currently transferred to the projects providing the opportunities and so these are frequently under funded and short of staff.
- 4.32 Food distribution projects, such as FareShare and the Trussell Trust prevent large amounts of food (primarily from supermarkets and processors) from going to waste. The distribution of this surplus food currently represents the primary source of food procurement for the vast majority of community food providers across Wales.
- 4.33 Whilst recognising the vital service these have provided during times of crisis, many community food groups are desperately seeking additional and alternative means to support sustainable procurement of their food stock.

- 4.34 Broadly, there is a need to reframe the conversation around nutritious food distribution to encourage wider take-up and establish a balance between provision of surplus food, and locally grown food.

5. Feedback on the Community Food Systems Map

5.1 This section details stakeholder feedback in response to the systems map, specifically. Stakeholders were asked a number of questions to stimulate consideration around the overall structure and accuracy of the map, such as:

- What do you notice about the way the map is structured?
- What can the current map tell us about community food in Wales?
- How is 'x' theme represented by the map?
- Based on your understanding of community food, what (if anything) is missing from the map?
- What level of detail should the map aim to capture?

Initial Feedback

5.2 Stakeholders provided mixed feedback when first introduced to the map. Where appropriate, all sessions included a live 'walkthrough' introduction of the map and its features – as well as a short amount of 'quiet time' through which stakeholders who were more technologically literate could access the map directly and navigate it themselves. In the groups for community members and volunteers, a direct introduction to the map was deemed less appropriate – given its intended audience (strategic stakeholders).

5.3 The majority of stakeholders could acknowledge the level of time and effort put into the mapping exercise. Many appreciated the comprehensive perspective it offered and recognised visual mapping as an effective tool for understanding complex systems.

5.4 For some, the visual map itself was described as 'too overwhelming' and the research team observed that when focusing on it as the central point of discussion – it could equally stifle engagement, as stakeholders felt pressured to either accurately interpret the map, or reluctant to challenge it. When moving away from the map however (towards the Miro board) stakeholders were often more comfortable in

commenting the questions or considerations that it had prompted for them.

- 5.5 Alongside their generally positive feedback, stakeholders also provided constructive criticism, aiming to enhance the map's accuracy and completeness.
- 5.6 This feedback highlights possible areas for adaptation suggested by stakeholders. This should be interpreted in the context that the existing systems map was intended to represent Welsh Government's understanding of the *status quo* and not its aspirations. It is inevitable that some of the suggestions from stakeholders may be interpreted differently, but nevertheless they can act as useful indicators of both current market failure and potential action points or scope for policy leverage.
- 5.7 There is also a fundamental question here, about whether the map is a representation of the whole food system as it stands or is a map of the current status of community food. These two starting points might lead to different and subjective interpretations of the current position, and this needs to be considered.

Feedback on the structure and weighting of elements

- 5.8 Stakeholders from volunteer and activist organisations expressed some concern around the representation of relationships or feedback 'loops' in the Map, posing a risk that the inter-connectivity of elements may equate to problematic assumptions about an element's level of influence or importance.
- 5.9 Specifically, they were apprehensive about the intense focus on economics and agriculture, recognising from their own experiences of community food provision, that these factors have a minimal role in the current community food system (aside from contributing to surplus food).
- 5.10 Additionally, stakeholders noted the missing roles of hospitality and tourism on local food economies, emphasising that these areas had

important links to the nature of employment opportunities offered in a given area.

- 5.11 Stakeholders working in public sector procurement were concerned that the community food "landscape" may vary significantly when comparing different regions in Wales. This suggests that the map may not fully capture the diverse nature of community food systems across the country. For this reason, it is important that the parameters of the map are more clearly defined moving forward – further discussion around this is presented in section 6 of this report.
- 5.12 Stakeholders from the private sector noted the importance of the Welsh Government taking a strategic overview of the community food landscape. They stressed the importance of prioritising quick wins to generate momentum and facilitate positive change. In this regard, they suggested that the map should be designed to specifically highlight these quick wins, for example amending the minimum areas of cultivation for growers to be eligible for support and to access permitted development rights.
- 5.13 It could be countered however, that the problematic nature of 'short-termism' was cited as a frequent and recurring cause of the flaws in our wider food system, with stakeholders posing a central criticism that the Map fails to reflect what sustainable decision making to support the CFS would look like. Although this is a comment on what stakeholders want to see, it does express a more general sentiment in terms of the credence given to community food as an integral part of Wales' social and economic fabric.
- 5.14 Participants from the Sustainable Food Places group, and wider workshops, perceived a substantial structural divide between the 'community' represented on one side of the map and the influence of 'big retailers' on the other side. They felt that the map lacked the depiction of consequences and impacts stemming from the relationships between these.

Thematic investigation

5.15 Areas of interest noted through feedback during our introductory testing phase with the Expert Group, provided a natural basis for structuring the workshop series around the following key themes.

Climate change and the environment

5.16 Stakeholders were pleased to see the presence of CSAs on the map, as they are inherently linked with a hyper local food system that prioritises sustainable food production methods. However, there was significant concern raised over the economic focus of food production alongside the presence of intense agriculture. Whilst it was acknowledged that this system is predominant in Wales, it was felt that the social and environmental costs of this were not clearly apparent from the map.

5.17 Although the map is intended to present the Welsh Community Food system in its current form, concerns were raised that the risks (and evidence) of climate change have not been adequately expressed in its current iteration. Stakeholders emphasised that the justification that the map reflects ‘the current status’ of Community Food was not a substantial reason for its exclusion. Failing to accurately capture the significant relationship between the wider food system (and its reliance on importing/exporting, as well as unsustainable farming practices) and climate change – creates the risk of presenting a harmful feedback loop through the map.

5.18 Stakeholders were concerned that the map was missing the nuance between mass-industrialised farming, and small-scale, ecological growing. However, the map was seen to adequately illustrate the profit motive of the private sector in the food system and the lack of connection in terms of the private sector’s relationship to Community Food.

5.19 This was also raised by expert stakeholders alongside concerns regarding the absence of biodiversity, with little to no acknowledgement of the role of monocropping and intense agriculture in exacerbating biodiversity loss.

- 5.20 Participants within the environmental stakeholder groups suggested that a recognition of diet trends and their relationship to the food system would also be beneficial. Alongside this there should be some acknowledgement of the impact of changes in diet on both people and planet. This might help policymakers to better understand the connections between the way that food production, pricing, and advertising can shape either positive or negative diet trends.
- 5.21 Stakeholders from this group also suggested that more of an emphasis on land management was also needed on the map, alongside suggestions on what potential land use options there are and what impact this would have on the food system.
- 5.22 Stakeholders from the private sector were eager to highlight the role of organic farming techniques in promoting biodiversity and offering sustainable solutions to making production more environmentally friendly.

National food security

- 5.23 In direct relation to the risks presented by climate change, stakeholders raised relevant concerns around the increasing vulnerability of the Welsh food system.
- 5.24 Recognising growing threats to global food supply (demonstrated by recent impacts of the Russian invasion on Ukraine and Mediterranean harvest failures), discussions on the map lead to a heightened interest in increasing our capacity for supply. Stakeholders were particularly interested in successful examples which could pilot and pave the way, providing a route map which other Community Food initiatives may be able to learn from in the near future.
- 5.25 Many stakeholders view Wales as a vulnerable nation, due to our low levels of horticultural production, meaning that our food sovereignty is relatively poor – despite benefitting from advantageous climate conditions. The need to increase horticulture production was seen as a means to build resilience and safeguard against projected climate

impacts, as well as offering a range of environmental and social impacts.

- 5.26 In addition to this, stakeholders highlighted that using our own resources more effectively would make an important contribution towards our '*globally responsible Wales*' WFGA goal.

Socio-economic inequalities and diet quality

- 5.27 Stakeholders generally felt that the links between social-economic inequality, material poverty and limited dietary choices could be more clearly expressed through the map.
- 5.28 Third sector stakeholders wanted to see greater clarity around the impacts of the cost of living crisis on the supply of community food – through reduced donations, capacity of third sector organisations and availability of volunteers.
- 5.29 These factors would be set against increasing demand for low cost and emergency food provision, leading to even greater need.
- 5.30 The nature and quality of surplus or donated food products were also discussed at length, with both volunteers, wider third sector, and public health professionals stressing that **surplus food could not be a long-term solution for supporting communities**. Many stakeholders drew attention to the fact that a vast number of Community Food initiatives had started as an 'emergency response' to what they had anticipated, would be a short term need. The decline in living standards and increasing levels of food poverty were never anticipated to hit the record highs of current circumstances.
- 5.31 It is therefore necessary to recognise that surplus food (predominantly tinned, long-life, processed products) is not an adequate solution for supporting households over longer period of time. The produce currently provided by Community Food initiatives is simply not sufficient for supporting a balanced, nutritious diet.
- 5.32 The vicious circle between social inequality, inadequate diet, poor health outcomes and lack of access to employment was therefore

identified – with community food seen as a potential entry point to break the cycle.

- 5.33 Stakeholders also raised the issue of just transition and the risk that climate change affects the poorest in society the most. This implies a need for increasing support for the least well off in society to sustain a basic level of nutrition in their diet.

Role of the public sector

- 5.34 Overall stakeholders felt that the representation of public sector stakeholders in the map was limited. Whilst it was acknowledged that public sector procurement was recognised through the existence of its own loop, it was deemed further detail was needed given the importance of the role the public sector has to play. Especially in the context of determining criteria that supports local produce in the application of large scale public procurement contracts.
- 5.35 Given its prominence and responsibility in the food system, there was an expressed need for public procurement to be captured more clearly in the map. Specifically, its contribution to the health prevention agenda and the Wellbeing of Future Generations Act through Community Food, primarily through the goal of a *Healthier Wales*.
- 5.36 A shortage of accessible space for communities was also highlighted as an issue, which is not highlighted in the map as things stand. Furthermore, the public sector role in coordinating and promoting relevant training opportunities relevant to community food was highlighted. This included linking the public sector to horticultural skills in the map.
- 5.37 Talking more widely about the relationship between the public sector and community food, Carmarthenshire’s adoption of a systems approach to mapping the financial barriers to accessing fresh local food was highlighted as a good example for other public sector bodies to follow. Carmarthenshire was also praised for its Community Food Hub which aggregates produce from small scale producers,

supporting horticulture and farm diversification, whilst also creating more resilient supply chains.

Role of the private sector

5.38 There is a notable gap in stakeholder feedback surrounding the role of the private sector. The lack of engagement the exercise has had from private sector representatives (at the higher level of commercial influence) leaves us with little evidence to indicate that supermarkets can and will contribute to community food. Similarly, stakeholders saw minimal connection between the commercial food system and the *production* of community food. That said, stakeholders commented on the private sector through the following observations:

- Interest in the potential for smaller, independent producers to supply community food through the means of public sector procurement (and forming co-ops in order to supply at scale)
- The recognition that smaller, independent producers can and do make a meaningful contribution to the foundational economy and local economies across Wales
- The recognition that smaller, independent producers won't compete with supermarkets on price, but that there is a more affluent consumer market to support local produce
- The importance of making distinctions between 'free food' and community food, and the acknowledgement that these things should not be mutually exclusive
- The issue that the relationship between supermarket retailers and community food provision is primarily through the means of distributing food waste
- The recognition that supermarkets enable a greater diversity of choice and convenience for consumers
- The recognition that supermarket shopping can help households who are short on time and transport options to budget their food shopping and plan out their meals more effectively

- The potential for producers to work in direct cooperation with community food providers, whilst also retaining an income through subsidy models (affordable food clubs, membership models which enable a greater diversity of produce for communities beyond surplus items)

5.39 The nature of feedback provided about the role of the private sector reflects the centrality of their position in our food system. Whilst stakeholders agreed this to be the ‘reality’ at present, they also highlighted how problematic this is in the context of widespread household food insecurity. Until supermarkets can provide a compelling narrative around their role in delivering accessible fresh food provision which can also guarantee low food miles, it will be challenging for those involved in community food to comment on the abilities of the most powerful influences in the private sector to contribute to the CFS.

What is missing from the map?

5.40 To help guide the further development of the map, stakeholders were asked to highlight any specific factors which should be considered for inclusion. These might include current gaps or some aspirations, and are listed below:

Table 1: List of stakeholder suggestions for map changes

Education and Health
Greater focus on prevention
Greater reference to wellbeing
Chronic disease
Sense that the role of schools is under-represented in the current map
Education and food skills too minimal
Farming and Growing
Permaculture
Compost making
Skills demand
Risks of over-reliance on single seed species
Community impacts of mechanisation

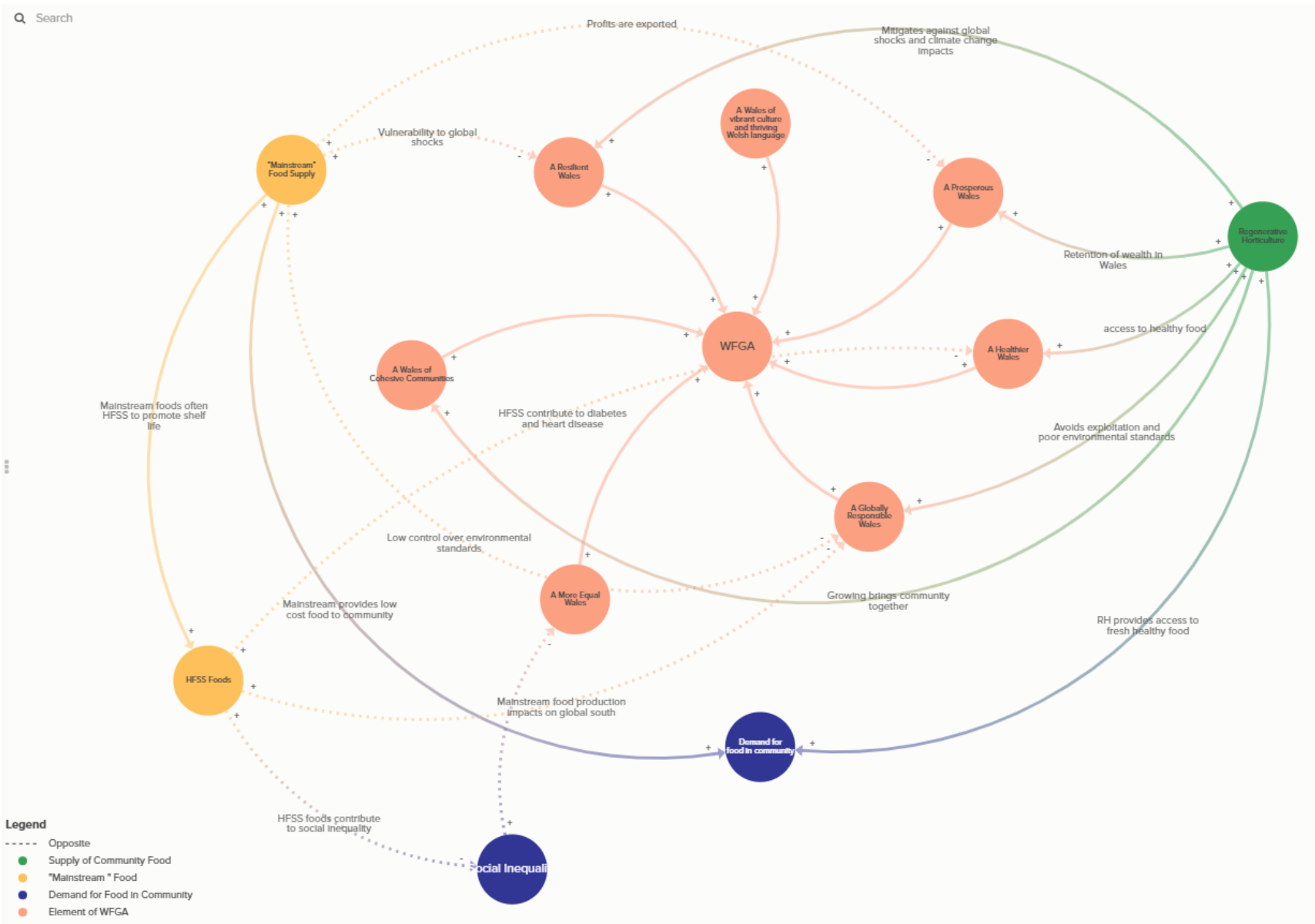
Prioritising soil health
Greater influence of the subsidy system
Role of technology (good and bad)
More emphasis on land management (consequences of losing land for tree planting)
Role of land for leisure (e.g. golf courses)
Differences in land access across LA and health board
Social Inequality and Community
Consideration of 'food deserts'
Role of third sector in providing household food security
Diversity of community food distribution needs acknowledging
More emphasis on global responsibility
Significant role of community housing
Emergence of innovative solutions (food sharing apps, food vending machines providing 24/7 access to emergency food in Pembrokeshire)
'Free' community food provision
Subsidised/membership based community food provision
Climate and Environment
Biodiversity
Species extinction
Marine element hasn't been included
Embedding biodiversity in housing (expanding role of green spaces)
Consideration of imports on our green spaces. Food and drink consumption is biggest source of carbon emissions
Policy / General
Office of the Future Generations Commissioner Role
Net Zero 2030
Foundational economy
Just Transition
Should reflect trends e.g. climate impacts, diet impacts
Role of waste reduction and recycling
Hospitality sector needs far greater representation
Recognition of short termism (across the board)
More decisive language
Need to show the advantages of local systems producing fresher, healthier food, vs food that is mass-produced, stored for longer periods of time and imported from great distances

6. Alternative models of Community Food Systems Mapping

- 6.1 Following initial reviewing of the community food systems map with stakeholders, the decision was taken to trial some alternative framings of the map. This was based on feedback that the existing map was very economically driven and perhaps did not give sufficient centrality to the community food system.
- 6.2 Many stakeholders also struggled to identify a narrative or 'logical flow' around the structure of the initial map – it was felt that providing a more clearly defined sense of structure would help to provide clarity.
- 6.3 Three alternatives were sketched out and a small selection of stakeholders was consulted on each one to gauge support for a reframe. Examples and comments are laid out below.

Wellbeing of Future Generations Act

- 6.4 The first example placed the Well-being of Future Generations Act at the centre of the map, surrounded by its seven goals. This was chosen in recognition of the central role that the WFGA has to play in influencing all future policy in Wales.
- 6.5 Examples of how different map elements would respond to the goals were added, to understand how this might build out.
- 6.6 Stakeholders felt that the approach would be useful to help some groups understand the policy relationship but suggested that the approach might be cumbersome once built out to all elements.



Source: Miller Research. <https://kumu.io/millerresearch/wfga-approach>

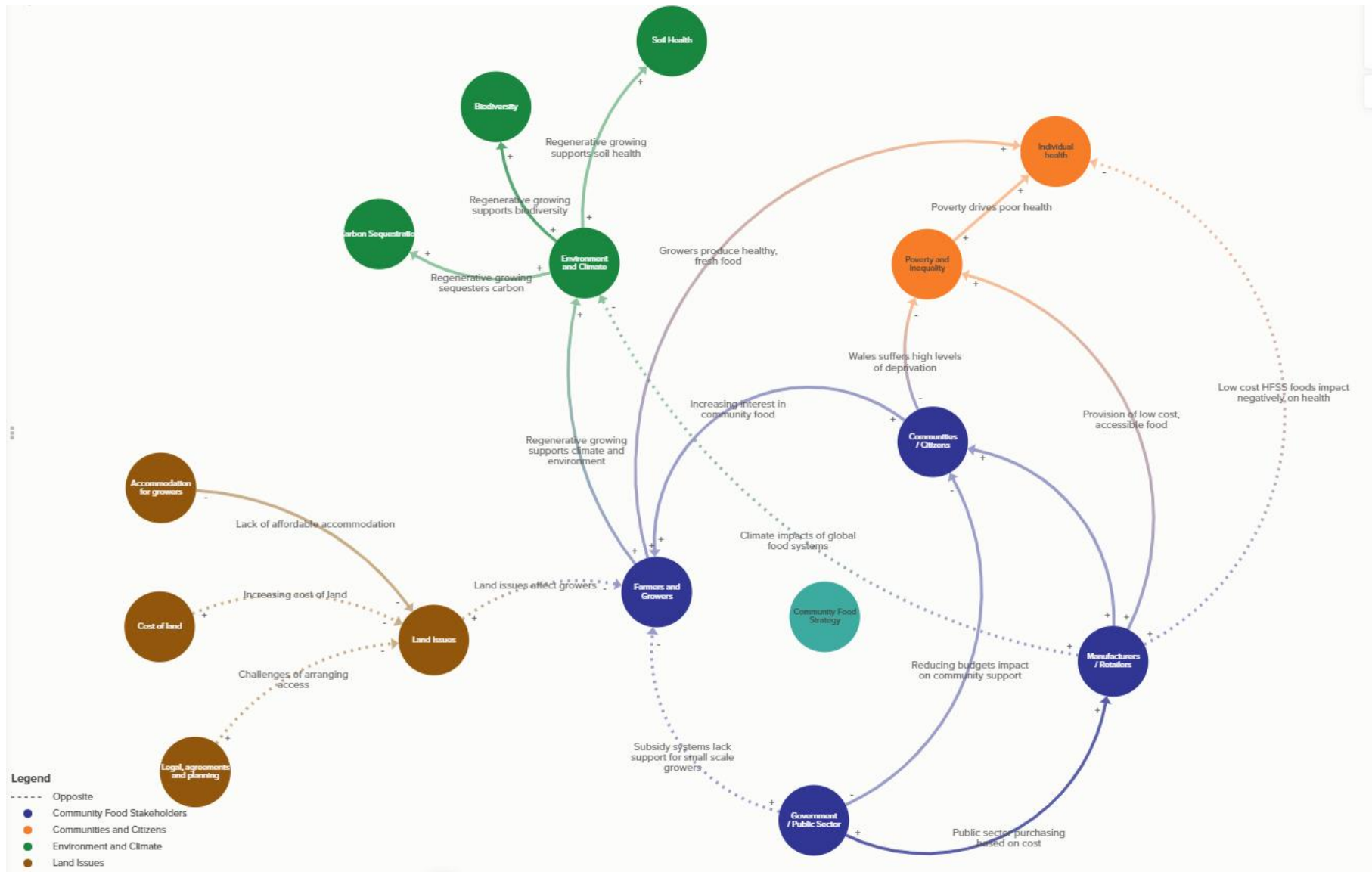
6.7 It was also noted that this approach could provide too much overlap/duplication across elements which might contribute to multiple wellbeing goals.

Stakeholders in the Community Food System

6.8 A second approach placed a loop of four key stakeholder groups at the centre of the map. These were:

- Farmers and growers
- Government / public sector
- Communities / citizens
- Manufacturers / retailers

6.9 Sample clusters of elements were attached to stakeholder groups, to illustrate how the map could evolve.



Source: Miller Research. <https://kumu.io/millerresearch/stakeholder-approach#community-food-strategy-stakeholder-approach>

6.10 Stakeholders were broadly supportive of this approach, although there were concerns that all issues should affect all stakeholders to some extent and so the map might require substantial numbers of connections to be robust.

Supply and Demand Approach

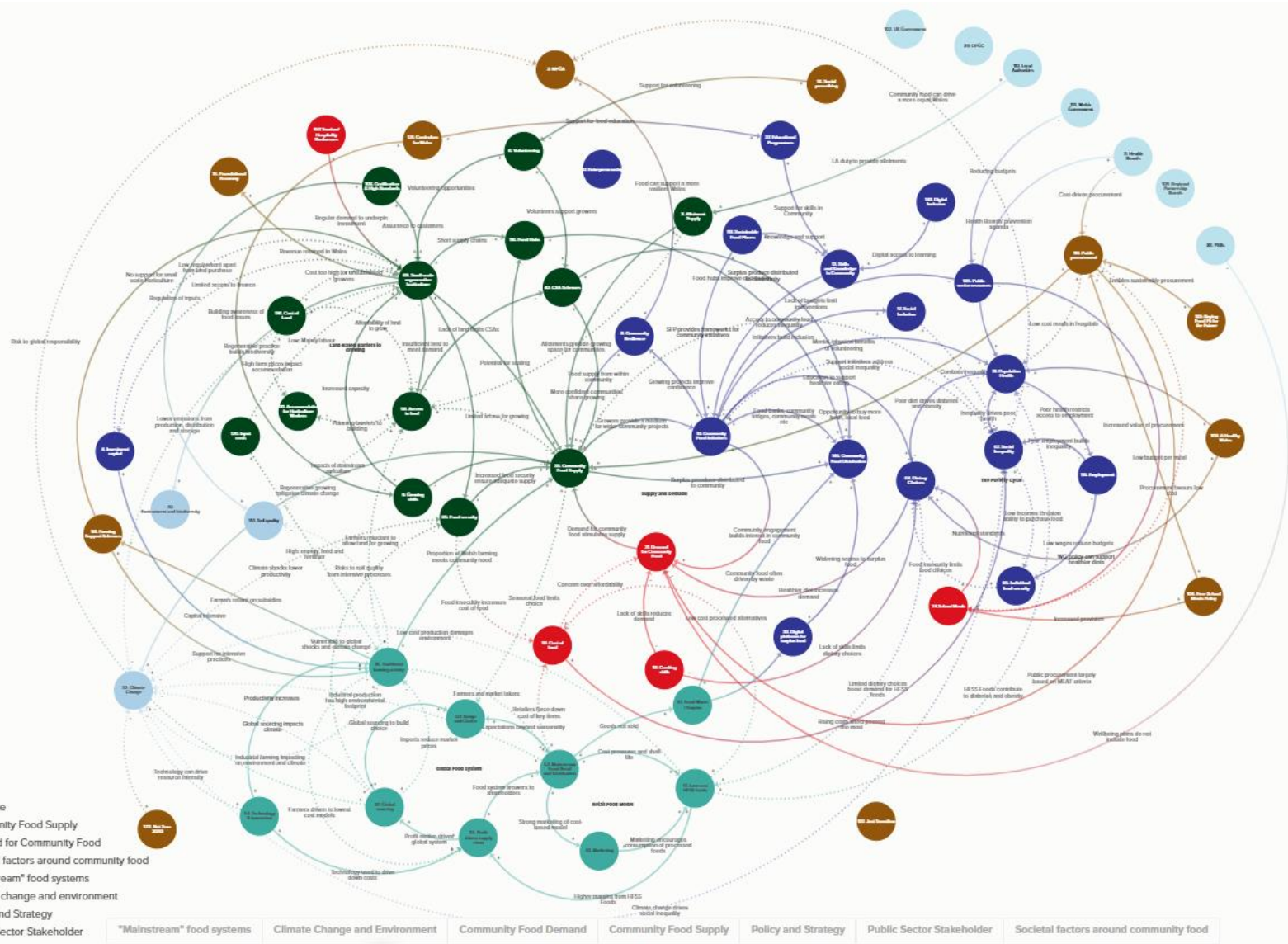
6.11 The third alternative took the approach of placing three key factors at the centre of the map:

- Supply of community food
- Demand for community food
- Projects linked to community food

6.12 In addition, on this map, an element of interpretation was introduced by describing the interaction between two elements in descriptive text on the relevant connection. This allows some elements to be removed from the map and would reduce ambiguity.

6.13 The map presents clustered issues relating to the three core elements, which allow the interactions between these to be explored. Around the elements which describe key factors in the community food ecosystem, is a ring of policy and strategy initiatives. These have been left, to use as entry points when considering leverage points. For example, universal free school meals can be connected to procurement of local food, to stimulate the supply chains and support local communities. The assurance of healthy nutrition feeds back into health policy and so on.

6.14 Beyond the policy area, key stakeholders have been mapped, but left largely unconnected, as prompts for further leverage discussions. This can examine how each stakeholder group can influence the map to address negative influences and vicious cycles.



Source: Miller Research

- 6.15 Stakeholders favoured this approach the most and it was agreed to work on fleshing it out to a near complete model. The supply and demand approach became favoured due to its ability to offer a more decisive, clear-cut understanding of where community food is coming from, and why its in demand.
- 6.16 This can be found at: <https://kumu.io/millerresearch/supply-and-demand-approach>

7. Governance responsibilities and levers of change

- 7.1 Identifying which stakeholders are responsible for driving change and contributing towards a future community food strategy has been a key focus of this research. In the context of the map, identifying ‘levers of change’, particularly in terms of policy, has also been crucial in ensuring its utility as a tool post-study.
- 7.2 There were a number of general comments posed surrounding the understanding that stakeholders (particularly third sector professionals and volunteers working in the community food space) hoped the map would convey to policymakers. In summary, these were:
- An understanding that supply for community food (in its current form) does not feel sustainable
 - The short termism of many funding cycles in the third sector undermines the ability for community food projects to build momentum and thrive
 - An over-reliance on volunteers to mitigate against economic failings has left the sector feeling fatigued and overwhelmed
- 7.3 The observations set out in this section present the suggestions made by stakeholders when asked *more specifically* about routes for intervention, on reflection of viewing the systems map.
- 7.4 The role of Welsh Government as an ‘enabler’ has been frequently referenced by public sector stakeholders, as well as other groups. Rather than projecting expectations around funding, stakeholders have urged policymakers to view their role as facilitators, supporting existing groups and partnerships to build on their activities.
- 7.5 This has included providing leadership and direction in many forms, including utilising its **influence over Local Authorities and public bodies to push forward action.**
- 7.6 Specifically, Welsh Government should provide support for policy that grants public access to land, as well as the leasing of allotment

spaces. Specific suggestions included exploring the conditional leasing of allotment spaces, prioritising those that would be used to support community food provision (as opposed to individual use). Several community groups also felt clarity was needed centrally in terms of whether food produced via allotments can be sold on. There appear to be a number of misconceptions around this.

- 7.7 Similarly, it is seen that the role of LAs could be more influential in the setting of requirements and conditions for any new developments (public or private) in order to designate space for the growing of community food. Through this it's imagined that LAs would be ring-fencing compulsory obligations to allocate proportions of any new land acquired. This was seen to be most relevant in the context of Housing Associations and developments in the first instance, but stakeholders felt that this could also be applied more widely – with a view to setting expectations that larger businesses should be providing community benefits beyond 'new jobs'.
- 7.8 The LA areas of Carmarthenshire and Powys have been cited as leading examples in this space that Welsh Government should promote and encourage other authorities to follow. Furthermore, Welsh Government should be emphasising the importance of integrating food strategies in the development of local development and wellbeing plans by PSBs and other organisations. This can also be applied to the social prescribing agenda; viewing it not purely as a growing activity, but a basis for addressing diet-related ill-health more holistically.
- 7.9 In the Programme for Government - update²⁸ the commitment to develop a community food strategy is listed as a response to the climate and nature emergency. In this context, community food needs to be considered for its contribution to promoting biodiversity and

²⁸ <https://www.gov.wales/sites/default/files/publications/2022-01/programme-for-government-update-december-2021.pdf>

reducing carbon emissions, as well as the foundational and local economies.

- 7.10 Stakeholders deemed Welsh Government as having a role to play in terms of the planning for rural accommodation, increasing ease of access for growers. They were also urged to revisit the current subsidy system with a view to better incentivising small scale growing, which is viewed as productive and efficient. The role of the Sustainable Farming Scheme should be considered in opening up new opportunities for those from 'non-traditional' farming backgrounds.
- 7.11 Welsh Government is also seen as being able to use its fiscal powers to drive the prevention agenda, placing community food at the heart of this effort. Groups discussed the viability of strategically linking budgets (across other sectors) to position food as an over-arching priority, targeting health and wellbeing outcomes. For example, food is a significant problem for the health sector, given that some 30 per cent of people entering hospital are suffering malnutrition and hence are slower and less likely to recover and more likely to become ill again. Allocation of a small proportion of health budget to prevention via community food could assist here.
- 7.12 **Valuing Community Food** – the need to value Community Food arose as a common theme across all of our discussions. Stakeholders emphasised that the mainstream food industry's 'success' had been heavily supported and subsidised by Government, and that a recognition of the benefits of Community Food would be required in order for it to be 'taken seriously'. Stakeholders cite Community Food's potential to deliver on a wider range of policy agendas under the current Programme for Government as an incentive for this. These include:
- Supporting Foundational Economy growth & resilience
 - Establishing sustainable provision for the delivery of Universal Free Primary School Meals

- Supporting the Fair Work agenda (fair work for growers, producers, and third sector workers)
- Making a significant, low-investment contribution to expanding Social Prescribing activities (food growing comes at a much lower cost than other outdoor activities, for example)
- Providing valuable Careers and Work Related Experience (CWRE) to deliver on the New Curriculum for Wales, and the Welsh Baccalaureate – this is seen to provide multiple benefits in terms of direct contribution to community growing (easing pressure on volunteers), improving education around sustainable food and sharing foundational skills for ‘green jobs’ in later life
- Supporting the promotion of Welsh Food and Drink, raising awareness of the benefits to purchasing local food
- Ensuring that healthy choices are available and accessible to all, making nutritious food the default, convenient option – so that decisions to increase or limit the sale of unhealthy of HFSS aren’t seen to unfairly penalise who struggle to match calorie content through fresh food items
- Reframing the conversation around nutritious food distribution to encourage wider take-up and establish a balance between provision of surplus food, and locally grown food as a means of engaging community.

7.13 Overall, stakeholders were keen to emphasise that they viewed the Community Food System as complementing, as opposed to competing, with the mainstream, ‘commercial’ food system. They stressed the viewpoint that neither system is mutually exclusive, expressing their desire for this to be reflected in policy-making decisions going forward.

7.14 Stakeholders across groups advocated for working more strategically with the private sector, to generate greater impact. Many community food initiatives however, had struggled to effectively navigate these relationships themselves – and will need further support in this space.

It was noted that relationships with the private sector must progress beyond a willingness to offload surplus food from the larger retailers.

8. Next steps and the Community Food Strategy

Value of the CFS systems map

- 8.1 In many ways, the community food systems map has built a strong foundation for highlighting the issues around community food and viewing community food more holistically.
- 8.2 Though the initial map contained a very high number of elements, the effort to include and to recognise the wider relationship between food and society was highly praised by stakeholders. In terms of the elements underpinning the foundation of the map, it should therefore be noted that a high degree accuracy had been built into the original development process.
- 8.3 A fundamental issue has been reckoned with throughout the stakeholder engagement exercise however, through the limitation that viewing the map as a 'current reflection' of our community food system imposes. Given the many barriers that community initiatives face to sourcing and growing their own food, limiting the map as a 'current' snapshot was seen to risk an 'echo-chamber' or 'feedback loop' scenario in which little changes.
- 8.4 It is therefore imperative that the comprehensiveness of the CFS map is met with proportional ambition to deliver a community food strategy which is fully sustainable, not only financially, but also in terms of social and environmental stewardship, and in recognition of the climate emergency.
- 8.5 Many successful systems map are centred around an over-arching goal or aspiration for long-term systemic change. It is possible in this case, that the vision for the CFS has been capped, perhaps understandably – by the economic circumstances of our time. These challenges, however, can equally highlight significant openings for opportunities.

8.6 Stakeholders hope that the feedback captured through this engagement exercise and detailed in this report, can help to capture ambition around the CFS and drive it forward.

Using this feedback to guide the CFS

8.7 A full consideration of the issues raised by stakeholders in this consultation has highlighted a perceived disconnect in the direction of Welsh Government policy on community food to date.

8.8 Whilst the current food and drink vision for Wales²⁹ is widely perceived to be focused on growth in turnover and GVA, other areas of government are *seen* to be responding more quickly to the declared climate emergency, developing the foundational economy and addressing a looming health crisis driven in large part by poor diet and social inequality. This is perhaps due to an historic (though not necessarily accurate) perception, that food and drink is one step removed from wider social and environmental issues – demonstrating a clearer relevance towards boosting perceptions of Welsh food for trade purposes, strengthening local economies, and nurturing food tourism.

8.9 From the exercise undertaken however, it is now clear that food and drink is increasingly viewed as a broad church under which to unite a range of policy ambitions. In the context of what many stakeholders are framing as a current population food security crisis, and a future national food security crisis, food and drink is well placed to support the cultural shift required to put strategy into action.

8.10 Throughout our workshops, stakeholders repeatedly questioned the economic focus in the current structure of the systems map. Although this is acknowledged to be the dominant force in the food sector in Wales, it was felt that the wider (possibly unintended) consequences of this are not fully acknowledged under the framing of the current map.

²⁹ https://www.gov.wales/sites/default/files/publications/2021-11/vision-food-drink-industry-2021_1.pdf

- 8.11 The current map highlights two prominent risks which, if not addressed – could result in a loss of engagement and support towards the further development of the community food strategy. These are, primarily:
- The need to intervene in the *supply* of community food, through a necessary increase in horticulture production to ensure that communities have access to fresh produce (easing reliance on surplus food)
 - A requirement to position community food in the context of the climate emergency, to avoid a widespread loss of support – and to ensure distance from the UK Government’s heavily critiqued food strategy
- 8.12 With this in mind, the alternative ‘supply and demand’ model of the map is seen to offer potential, through fostering understandings of the ways in which the available and potential means of ‘supplying’ community food can be matched with positive or negative outcomes.
- 8.13 In the most obvious sense, the supply and demand map should highlight to policymakers that whilst mass-industrial food production offers scale and range of choice to consumers – its long term consequences (promoting unhealthy diet trends and damaging the productivity of land) need addressing at the root. Short term actions, such as pressuring supermarkets to expand their value ranges and drive selected product line prices down aren’t enough to address systemic failures, and evidence from stakeholders involved in community food provision, as well as trusted sources like the Food Foundation have made this clear.
- 8.14 Based on these learnings, we conclude that the only logical route to supporting affordable fresh food provision, which guarantees low food-miles, is to support communities who want to take food production into their own hands.
- 8.15 We therefore emphasise the importance of a cross-governmental approach to guide the further development of the CFS. Activities

undertaken as part of this stakeholder engagement exercise have highlighted the enthusiasm and widespread ambition to support community food across Wales, whilst also pointing to pragmatic solutions. These have primarily revolved around overcoming basic, inexpensive barriers to fresh food production such as access to land.

- 8.16 Such an approach could help to ensure that the holistic nature of community food is adequately reflected in discussions, and that resources are brought in from across government to support this important agenda.
- 8.17 As a supplement to this, we would urge Welsh Government to reconsider its strategic position to provide co-ordination of fiscal support for community food, adopting a unified approach in recognition of savings to be made in the long run. It should be encouraging to know that stakeholder's expectations around the CFS are pragmatic and realistic (as outlined in sections 4 & 7), acknowledging that public funding in Wales is ultimately constrained. Within those limitations however, stakeholders were keen to share examples of commercially viable models of horticulture small holdings, which can deliver on both the economic and social fronts seen to be priorities of the CFS.
- 8.18 The increasing wealth of evidence to support the effectiveness of investing in *prevention* was widely discussed by stakeholders, and in turn the risk of widening health inequalities which will continue to cost our public services in one form or another moving forward. For this reason, it is suggested that responsibilities for funding and coordinating the CFS should be shouldered beyond the Food and Drink division, though Food and Drink have an integral role to play in strengthening the supply and commercial viability of local food.
- 8.19 At present, much of the progress in expanding community food is being made by local authorities, acting in isolation with support from Welsh Government. This has been highlighted to us by the frequent mention of the 'pioneering' examples of the LAs which are seen to be

pushing the community food agenda forward, praised for their independent commitment to taking action.

- 8.20 The research team must draw attention however, to the fact that this activity is notably recognised in some of our most affluent counties. If these areas are already several steps ahead, we must consider the danger that without decisive action from the CFS at the national level, existing health and social inequalities across Wales may only become exacerbated through the disparity of access to fresh food.
- 8.21 Welsh Government now has the opportunity to capture the agenda around community food by demonstrating strong, ambitious and co-ordinated leadership, which has listened to the views of stakeholders contributing to studies such as this. This need not be resource intensive, but by taking enabling actions across Government and engaging with partners such as the Future Generations Commissioner, some of the current barriers to building a thriving community food sector could be addressed.

Annex A

The images below provide a snapshot into the virtual workshops held with stakeholders, and the feedback gathered using the Miro platform:

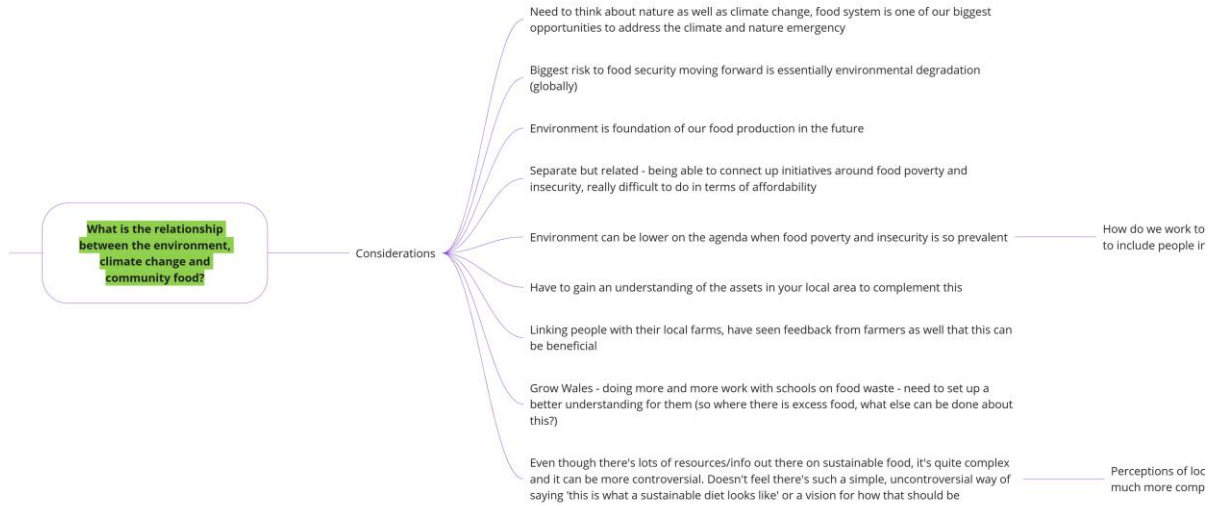


Figure 1: definitions of community food



Figure 2: initial feedback on the map

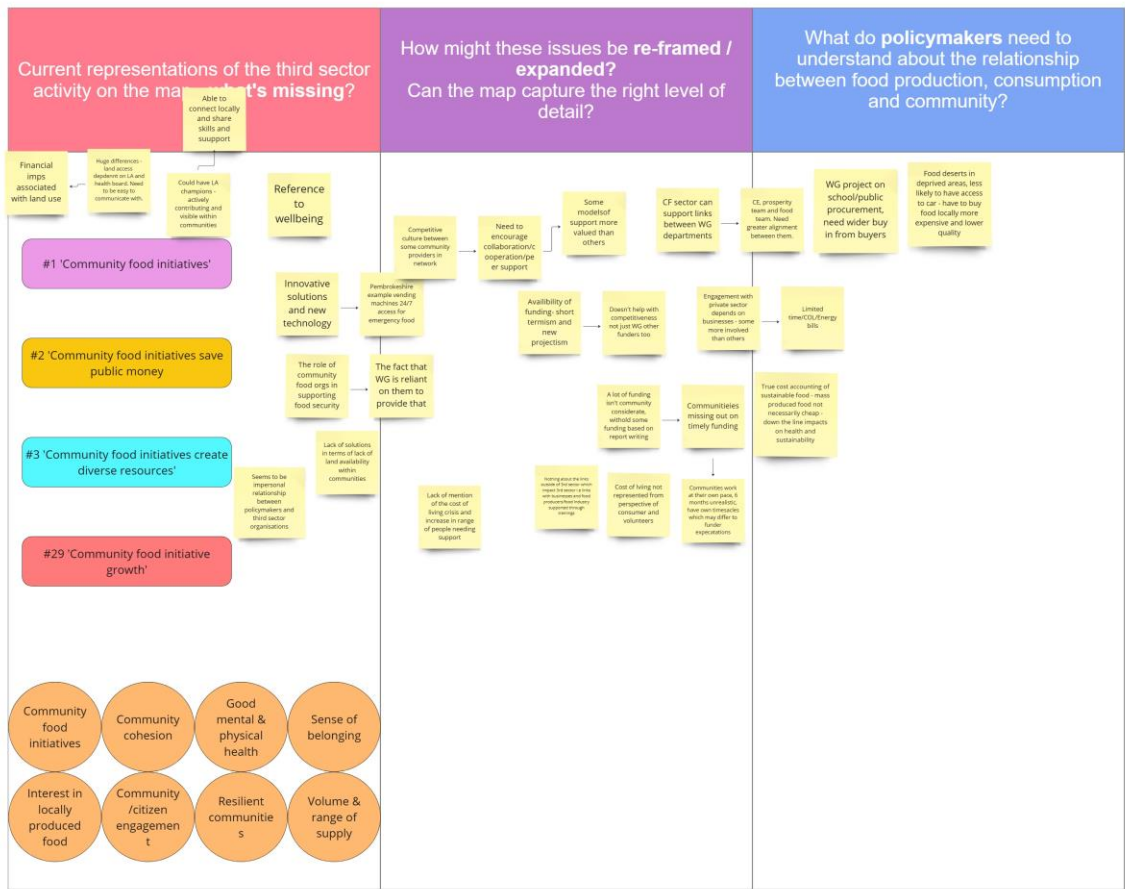


Figure 3: testing accuracy

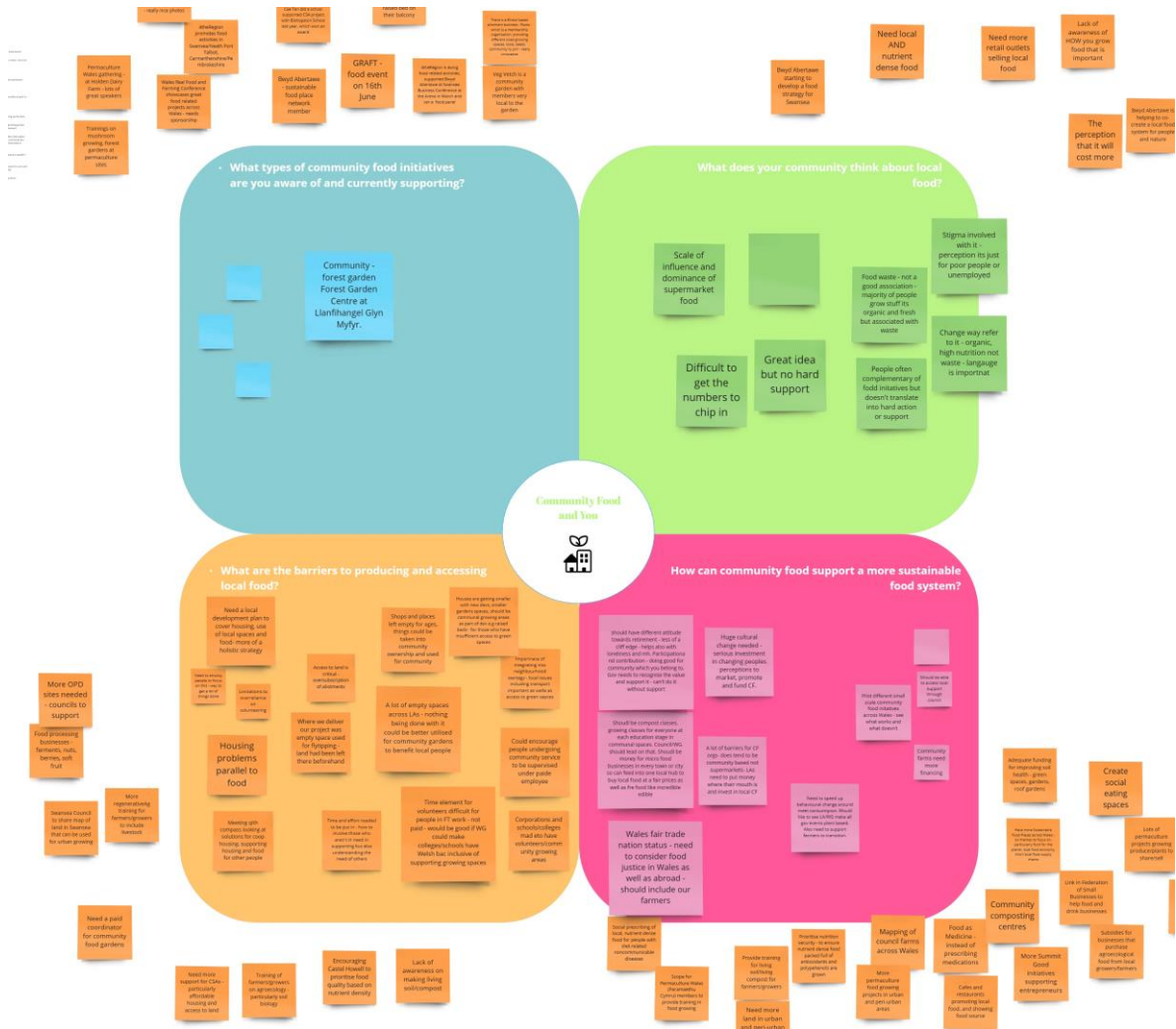


Figure 4: exploring barriers and enablers with CF volunteers