

## Written evidence submitted by the Food Policy Alliance Cymru (COV0052)

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### Food Policy Alliance Cymru

Food Policy Alliance Cymru is a coalition of organisations and stakeholders building and promoting a collective vision for the Welsh food system.

Through collaboration, engagement and research the Alliance aims to:

- Co-produce a vision for a food system in Wales that connects supply and consumption and gives equal consideration to the health and wellbeing of people and planet
- Advocate for policy change to address the climate and ecological emergencies, the public health crisis and the rise in food insecurity.
- Ensure Wales is linked to UK policy, research opportunities and the broader Global system.

### **Group Membership**

RSPB Cymru

Slade Farm

WWF Cymru

Dr. Pam Mason

Food Sense Wales (secretariat)

Oxfam Cymru

Sustainable Places Institute, Cardiff University

Landworkers Alliance Cymru

### Summary

The responses below pick up on the questions relevant to the food system and the economy in Wales. They call for an integrated and comprehensive food system plan for Wales that connect supply and consumption and that give equal consideration to people, planet and profit. The responses highlight some of the vulnerabilities in our food system, both in the rural and urban context, and some of the opportunities the pandemic has presented to “build back better”.

**What additional flexibility is needed to support seasonal industries, such as tourism and agriculture, during the pandemic?**

From an agricultural perspective the pandemic has created multiple points of stress. Those stresses are visited on farmers unevenly and to a greater and lesser extent. It is important to stress that **“flexibility” should not lead to relaxation of labour standards or environmental protections.**

Producers with a single primary outlet such as a supermarket contract for beef or dairy, or reliance on open livestock markets are experiencing a fundamental depression on prices (ADHB). Their ability to ride out the short-term impact is linked to individual willingness and capability to support the operation in that short term. The inbuilt assumption is that the supply chain will be ‘fixed’ by a return to a version pre lockdown freedoms/economy and this will allow the supply chain actors to recover.

Mixed farms and small horticultural operations have a different set of challenges. Often these farms are highly diversified with multiple enterprises many of which have a retail element. These farms are scaling up operations to meet unprecedented demand for products such as veg, meat and flour (73 % of farmers have introduced box schemes, delivery, and/or increased production to deal with the needs of the pandemic -Tyfu Cymru). In the short term farms are coping but in the medium term

they will need support at an infrastructure and business planning level to maintain the developing capability. This is especially the case in horticulture where the demand spike on small scale local growers is significant. The increase in demand is twinned with a complete halt to traditional forms of labour including seasonal migrant labour and volunteer programmes such as WWOOF. In respect of this the (Lantra) skills matching service is a positive step and should be supported and pushed hard to create viable labour force to meet the demand. Including relaxing rules on furloughed workers engaging in alternative (agricultural) work to meet the seasonal demand.

The role of small scale farms linked to and supporting their local communities is a positive output of the pandemic. It has created burgeoning short supply chains that flex to the needs of the community actively supporting those most in need. This phenomenon has to be solidified into a long term outcome. Targeted capital investment now, through a programme of support can secure that and build the capability for the long term. We are aware of a number of existing fruit and veg growers and new entrants who have the skills and capacity to expand but lack the capital for the infrastructure necessary. New polytunnels, irrigation systems, boreholes, tractor implements washing and packing sheds are often unaffordable for growers due to the very low margins they make, but if fully funded capital grants were provided to enable the purchase of these, it could make a substantial difference to output.

**The support needs to be coherent supporting local farms, local processors (abattoirs, mills), community food programmes and cross sector local food partnerships.** Flexibility in existing funds and schemes as well as additional resource can achieve this. For example, broadening the range of items that existing capital grant schemes to include machinery, tools and infrastructure for horticulture; reducing the match funding required and allowing existing capital grant scheme money to be spent on second hand products.

**What additional financial support does the Welsh economy require in order to survive during the pandemic and to recover afterwards?**

If current lock down rules continue to apply, and especially if travel to rural Wales is discouraged for holidays and breaks, we face a rural economy crisis far more severe than the Foot and Mouth closure of the countryside in 2001. This will require **comprehensive financial support for the regeneration of the rural economy in Wales**. There are at least three areas where the rural economy will need long term appropriate support during the Covid outbreak:

1. Food production (not least horticulture),
2. Tourism and hospitality
3. Small independent businesses, shops and outlets, including pubs and butchers

This will not work if it is just relatively small support payments. Rather a comprehensive and action based approach will be needed which also invests in nature restoration (healthy ecosystems in the short and long term underpin food production). **A rural re-generation fund and taskforce needs setting up immediately to plan for this over the coming months.** Remaining EU structural and rural development funding needs to be directed to this, and a recovery plan developed which assumes limited access to the countryside for tourists over the summer. Unless this is put in place, many rural businesses could close for good.

Local Authorities have been key to supporting the Covid food response with new partnership and supply chains established that should be built on moving forwards. Local authorities should be adequately resourced so that they can work in partnership with Welsh producers and suppliers to make the local food response resilient and to support the local economy. [Caerphilly Council](#) working with Authentic Curry Company/Castell Howell to produce frozen meals for the Free School Meals

delivery service is one example, Bridgend's partnership with Urban Foundry to produce an online trade website, [South Wales Food and Drink](#), is another. Co-ordinated cross sector local food partnerships could be key to recovery and to ensuring everyone has equitable access to healthy and sustainable food and this could include consideration of how land is used at an urban and peri-urban level to grow food. This could be supported through the [Sustainable Food Places Network](#) where funding for creating a Wales approach has been secured over the next 4 years supported by [Food Sense Wales](#). The FAO are about to report on a survey carried out covering 77 countries demonstrating the role local governments have played in the Covid Food Response.

What support do key sections of the population, including the elderly and the newly unemployed, need from the UK and Welsh Governments during and after the pandemic

In terms of the UK population the groups at risk of food insecurity have been identified as those economically, socially or medically vulnerable. These groups have been identified and quantified by the [Food Foundation](#). The Food Foundation YouGov [survey](#) conducted in early April 2020 found that households with children were 50% more likely to be experiencing food insecurity than those without. The [new survey](#) published on May 4<sup>th</sup> shows 5 million people in the UK living in households with children under 18 have experienced food insecurity since the lockdown started. 1.8 million of these experienced food insecurity solely due to the lack of supply of food in shops, leaving 3.2 million people (11% of households) suffering from food insecurity due to other issues such as loss of income or isolation. This is double the level reported by the Food Standards Agency in 2018 (5.7%). In Wales specifically, 14% of families reported food insecurity, compared to 17% for the UK as a whole.

Children have been directly affected. Parents have not been able to shield them from food insecurity. The parents of **2 million children across the UK** said they had experienced one or more forms of food insecurity, and more than **200,000 children have had to skip meals** because their family couldn't access sufficient food during lockdown. Children are at higher risk in families with members who are self-isolating, with medically vulnerable members, with single parents, where a child has a disability, and in large households. It was also found that households which included NHS workers and their children had an elevated risk. 31% of children entitled to free school meals (0.5million) are still not getting any substitute; and of the 621,000 children who were accessing free breakfast clubs before the crisis, only 136,000 are getting a substitute.

The weekly [Public Health Wales engagement survey](#) is finding that around 30% of people surveyed are worried about accessing food.

**The scale of the food insecurity challenge in Wales needs to be measured and monitored (using the USDA module) to ensure:**

- 1. National (UK and Wales) safety nets are adequate to prevent people falling into food insecurity**
- 2. Local authority responses are optimal in ensuring benefits and schemes are taken up by those eligible**
- 3. Those with protected characteristics are not disproportionately affected as currently indicated by the data**

Since the Covid-19 outbreak, there have been [calls](#) in the UK for the Child Benefit to be increased, and for the cap to be lifted. Other countries such as Italy and the US have introduced one off payments for all children, and Russia has introduced a one-off payment for children already on benefits. In real terms, Child Benefit in the UK is worth £6-7 less than in 2010, and just £10 more per week could reduce child poverty by five percentage points. It is also important to note that due to

the benefit cap, many families aren't benefiting from the recent increase in Universal Credit payment.

Regarding Free school meals, it was a welcome measure that Local Authorities have been encouraged to provide cash payments for Free School Meals and that £33m has been committed to provide free school meals throughout the summer holidays. However the quality of provision is inconsistent across Local Authorities and this should be monitored. Fayeth, a Children's Ambassador for the Right2Food Campaign gives her experience of lock down.

Welsh Government should be ensuring that Children with No Recourse to Public funds that suffer hardship should receive Free School Meals now and into the future.

Eligibility criteria for free school meals should be revisited to ensure that no child is going hungry - monitoring of food insecurity as referenced above would provide the evidence to inform this. Welsh Government should urgently review whether the Healthy Start scheme provides the best mechanism to support low income mothers and children to access sufficient fruit, veg and milk. Currently only around 60% of those eligible in Wales claim Healthy Start and the voucher value remains unchanged for 11 years.

Recent increase in the flexibility of the Discretionary Assistance Fund are welcome however there is still more that could be done to promote and advertise the fund.

**What work can be done to make the Welsh economy more resilient in the face of future crises and potential outbreaks of Covid-19 and other pandemics?**

A "Food System Resilience Audit" would establish which elements of the food system has worked well during the pandemic and then provide a snapshot of where investment would be best placed to scale up and out. The Food and Farming Commission are gathering evidence of the experiences in the food system during Covid 19 in their work [Road to Renewal](#) which could contribute to this understanding.

### **A Food System Approach**

COVID-19 highlights that the food system must urgently transform, for the benefit of both human and planetary health. Addressing agriculture and food system change should be a key component of Wales' response to COVID- 19. Creating a more sustainable food system will also be a more resilient food system in future times of crisis.

There were systematic problems in Wales' food system that needed addressing urgently before COVID-19. Many people in Wales cannot afford access to a healthy diet. The food system has negative impacts on the environment, public health and economic well-being. This hinders our ability to prosper as a nation both now and in the future. COVID-19 ultimately highlighted this problem further. Wales now needs to be in position to capture the evidence on the impacts of COVID-19 on our food system, and use this evidence to develop a new positive vision for the future of the food system. In addition to the details outlined below, a resilient food economy will also require support for short supply chain infrastructure, as detailed in our response to the question on supply chains, and a significant increase in the amount of fruit & vegetable production, as detailed in response to the final question.

Much of this vision is already presented in a "[A Welsh Food System Fit For Future Generations](#)" report produced by Cardiff University earlier this year. This vision should be based around the resilience of the food system to shocks. The Cardiff University report highlighted what a food system fit for future generations should look like, in accordance with the Well-being Goals and Ways of

Working of The Well-being of Future Generations Act. Key to this vision is the **development of a food system strategy for Wales that is cross departmental and delivers for the environment, health, economy and society, followed by the mechanisms and budget needed to deliver it.** This food strategy would be central to wider reform. If this food vision from the report were developed, we believe the Welsh economy would be more resilient. The Act has embedded the Well-being Goals across the public sector in Wales. This means that sustainable development has been mainstreamed into our processes, ways of working and long-term goals and when we speak of resilience in Wales, we do not just mean economic resilience.

### **Transitioning to a Green Economy**

The current crisis has provided people with time to reflect and evaluate what we mean by, and how we achieve, economic prosperity. For example, the recent [Interim Report](#) of the Independent Review on the Economics of Biodiversity led by Professor Sir Partha Dasgupta highlights the importance of biodiversity for the global economy and economic prosperity. The review calls for a transformative unified framework for thinking about economics in a way that fully accounts for nature. Key points include;

- Nature is an asset; just as produced and human capital are assets - however we are over exploiting it (as manifested by Covid-19).
- The loss of Nature is an asset management problem, and we must manage our overall stock of all capital assets more efficiently.
- The human economy is embedded within - not external to - Nature, which helps us to recognise the limits Nature places on the economy and, in so doing, reshape our understanding of sustainable economic growth.

Nature is not faring well in Wales, with the [State of Nature in Wales Report](#) telling us that 1 in 6 wildlife species face the risk of extinction (in Wales), and this loss of nature is why Natural Resources Wales's [State of Natural Resources Report](#) highlights that none of our ecosystems, on which we depend, are resilient. The Covid-19 pandemic has highlighted this challenge with studies linking the disease outbreak to the collapse of ecosystems and destruction of wildlife. Nature, the ecosystems it creates and the resources and services these provide, are the foundation of our social and economic wellbeing.

We need a green recovery from the Covid-19 crisis. By that, we mean focusing resources on addressing the climate and ecological emergencies, taking an ecosystem-based approach and providing nature-based solutions where possible. We also need investment in infrastructure, technology and skills to generate new green jobs that directly contribute to a climate-safe future. **Environmental growth is key to economic growth.** The management and use of the environment, and the multiplied economic effects of this generates spending of around £9 billion each year to Wales and £1 in every £11 of Welsh GDP is dependent on the environment. Furthermore, across the UK, current policy for Sites of Scientific Interest (SSSIs) delivers substantial conservation benefits, ecosystem service delivery and economic values. The value of the benefits of the existing policy are estimated at £956 million annually, almost 9 times as high as the £111 million annual public cost of the policy.

Any changes made to our health and social care system and our economic system to achieve greater resilience, must be changes that are environmentally sustainable and socially just.

### **Funding Nature Friendly Farming**

Climate change and biodiversity loss will continue to be the top risks to the Welsh economy in the

long term. Droughts and floods, for example, are likely to bring much greater economic and supply chain disruption in the future, and loss of natural capital is a major issue. On this point, the reports alluded to above, along with numerous others, including most recently the United Nation's [Special Report on Global Warming of 1.5°C](#) and [Global Assessment Report on Biodiversity and Ecosystem Services](#) identify unsustainable agriculture and land use as one of the main drivers of environmental degradation, not just in Wales but globally.

However, the food and farming system can play a huge role in reversing nature's decline and tackling climate change. **It's therefore vital that we develop progressive agricultural and sustainable land management policies in Wales that help tackle climate change and drive nature's recovery.** Last year's [Sustainable Farming and our Land](#) consultation proposed a move towards a 'public money for public goods' policy in Wales. This shift will enable farmers to restore the natural environment, alongside and through the production of healthy, sustainable and nutritious food. Incentivising nature-friendly and agroecological approaches to agriculture will improve soil health, manage wildlife habitats, boost pollinators and lock up carbon, thus securing the natural resources that underpin food security. Practical examples of farming practices that enhance biodiversity, reduce emissions and enable soil carbon sequestration can be found in the Landworkers' Alliance Report [Food, Farming and the Climate Crisis](#).

A new public money for public goods policy not only helps to address both the climate and ecological crises, but can also help build social and economic resilience in our rural communities. It creates a new, stable income stream that isn't affected by external shocks such as market prices, consumer demand or disruption to supply chains. There is much evidence that shows that nature friendly farming improves the financial performance of farm businesses. One such example is Nethergill Associates' Report [Less is more: improving profitability and the natural environment in hill and other marginal farming systems](#). Adopting *Less is More* farming can significantly improve the resilience of agriculture including to inevitable future change. However, if this is to be realized, it is essential that a new system of farm support is designed to deliver this shift.

How will supply chains need to evolve after this pandemic and how can the two governments work together to support these changes?

The COVID-19 pandemic and the associated restrictions on public movement highlight both the importance of the food system to our everyday lives, and the fragility in which it is currently constructed. The strain under which the global food system finds itself shows its susceptibility to stresses. Just-in-time supply chains, inefficient and unsustainable production, inequities (associated with affordability, access or distribution), and high levels of food loss and waste are among the problems. Our current system is not only vulnerable to shocks due to long supply chains, but it also encourages consumption and production patterns that put a strain on nature, human health and contribute to the climate emergency. In this sense economic strategies need to think more in terms of triple impact reporting - people, planet and profit.

Presently, an asymmetry exists in the supply chain between a large number of farmers and a small number of powerful processors and retailers. Similarly, there are very few routes to market, with nine major retail food chains capturing 95% of the retail market. Empty shelves in supermarkets during the Covid-19 pandemic drove many people to seek out alternative markets, such as local box schemes, farm shops and food hubs, to secure food and thus illustrated the importance of diversity of routes to markets. **Supply chains need to evolve to include a greater diversity of retail outlets;**

### **Welsh government policy needs to support the development of alternative routes to market.**

Greater diversity of markets creates resilience to crises that may impact one type of retail stream more than others. For example, if the hospitality sector is impacted, farms and other food provisioning businesses can turn to other developed routes to markets to continue to bring food from the field to the fork. Anecdotal evidence to date on Covid impact and responses indicate that those businesses who were able to respond flexibly and reroute food through alternative market channels have thrived during the Covid-19 pandemic. Additionally, supporting a greater number of suppliers within the varied routes to markets also creates greater resilience of food supply chains. This means that if any one (or several) business fails to adapt during times of crisis, there are several other businesses that can continue to carry on and manage to meet market demand overall. Because businesses are not operated identically, they have differing capacity to respond to different crises. Key principles of resilience are diversity and redundancy.

Local food also requires local food processing and manufacturing facilities. Hidden costs along the entire supply chains e.g. high food miles, can mislead consumers. Investment in this area, and the development of local infrastructures (e.g. co-ops, local food packing and processing centres, local abattoirs and on-farm butchering and manufacturing) is important. Given this, there is a clear role for government to be proactive in providing primary producers with a business environment that enables them to secure a fair return from the market, and a fair share of the profit that exists in the supply chain. Transparency is key to fair supply chains and better regulation and enforcement throughout should be put in place to prevent abuses of power.

Welsh Government policy that addresses these concepts and supports activity to build a more structurally complex and diverse supply chain can support a more resilient food system.

Supply chain complexity would include:

- variable length pathways, i.e. more shorter supply chains based on regional and national production, to balance the dominant role of the global supply chains;
- varying numbers of actors involved at different steps of the supply chain;
- multiple and diverse routes to market, such as retail chains, community food hubs, box schemes, buyer collectives; and
- food processing and manufacturing facilities, such as mills, abattoirs, dairies and washing centres.

A more structurally complex supply chain with above elements has a greater potential to distribute power and profit more equitably across food system actors.

With the right policies in place, re-localising our food production and consumption, and promoting shorter supply chains can generate multiple benefits for the local economy, environment, health and well-being. **Public sector procurement, including Welsh Government, should lead by example by ensuring the procurement of locally-sourced and sustainably-produced food that supports public health objectives.** Practical steps to enable small-scale producers to supply large public contracts via an intermediary or through a processing centre should also be explored. Small-scale vegetable producers may not have the facilities to wash and prepare vegetables to the standard required by a local school; however, a local processing centre that multiple growers can access would create more market opportunities for growers.

Creating more brand awareness around Wales' local, nature-friendly, sustainable produce and encouraging wildlife/conservation/environmentally friendly food certification could help food producers to become more profitable and sustainable, improving efficiency, reducing input costs and enhancing income streams through diverse activities. Labels such as Fair to Nature, Leaf Marque, Organic and Pasture Fed, and Marine Stewardship Council are a good way to determine if

the food you buy has been produced in a more nature/environmentally friendly way. Government, industry and corporate backing for these emerging market systems can help promote awareness.

Furthermore, future UK trade policy and *global* supply chains must be based on high environmental and welfare standards, with imports of food produced to UK standards. Unfortunately an amendment to the UK Agriculture Bill calling for lower standard imports to be kept out of future trade deals has been voted down and we now risk exporting our food-related emissions and reducing the competitiveness of Welsh producers producing to higher standards. It will be important for Welsh Government to influence the (UK) National Food Strategy in those areas that will impact on Wales, for example trade and labelling.

It is vital that supply chains focus on social justice and equity. The Covid Pandemic has widened inequalities and we have seen that those living in the most deprived areas of Wales the mortality rate is 44.6 deaths per 100,000 population almost twice as high as the least deprived area of 23.2 deaths per 100,000 population (ONS May 2020).

Emerging evidence regarding poor Covid 19 disease outcomes suggest that two of the major factors are Obesity and Diabetes. We know that the proportion of the Welsh adult population which is overweight or obese currently stands at 58% with levels of obesity higher across all ages in more deprived areas. In England a quarter of Covid 19 deaths in hospitals were of diabetics (NHS 2020). Obesity and type 2 diabetes are both diseases often caused by poor diet. UK food security has largely been an issue of access to healthy foods. High housing and associated costs combined with zero hour contracts and depressed minimum wages means that there is a greater proportion of working poor who are unable to afford nutritious food for their household. There has been a doubling in the number of households experiencing food insecurity since lock down ([Food Foundation You Gov 2020](#))

High and ultra-processed foods provide a cheap source of calories and have contributed to the problem of malnutrition and obesity. Affordability of healthy food needs to be addressed. The Broken plate report ([Food Foundation 2019](#)) recommends that the Governments Eatwell Guide should be used as the reference point for welfare payments by legally enshrining the cost of healthy living in social security legislation. Further devolution of tax making powers in Wales together with ambitions for devolving some welfare functions could provide an opportunity to consider this in Wales. All food and drink businesses should pay the living wage – this could be encouraged through Welsh Governments economic contract.

The Covid-19 pandemic has also illustrated (and will likely continue to illustrate as horticulture production in countries like Spain is disrupted) that the UK cannot over-rely on imported food to meet UK consumption needs and should consider means for increasing the production of healthy foods in Wales (see the case for investment in horticulture under lessons learnt), coupled with policy to increase accessibility. Both approaches are needed to improve UK food security and many examples are given through the [Sustainable Food Places Network](#) .

What lessons can be learnt from the pandemic for the future of the Welsh economy? and from the response of other countries for the future of the Welsh economy?

Food is part of the Foundational Economy in Wales and should therefore create and distribute goods and services to all. The Pandemic has exposed the vulnerabilities in the current centralised system with people unable to access food for many reasons and widening inequalities. Major retailers were given the mandate to provide for the country whilst many smaller retailers, producers and

communities picked up on the exposed vulnerabilities from just- in-time supply chains and online delivery slots.

A National coordinated Food Aid Task Force overseen by Government and including Government departments, WLGA, business, public health and the third sector should have been set up to implement a comprehensive plan for all those struggling to access food. Food Sense Wales together with the [Antipoverty Coalition](#) has been making this call. The Sustainable Food Place, [Food Cardiff](#), has set up such a [Task Force](#) at a local authority level and other examples from Greenwich and Brighton and Hove can be found on the [Sustainable Places Network](#) website.

Diverse and distributed food systems are more resilient with money invested in the local economy more likely to remain in the local economy as seen in the [Preston model](#)- this is expanded on in the supply chain question. **An Integrated food system plan overseen by a Cross Departmental Government Task Force which considers production and consumption strategies in tandem with planetary and human health, is vital to build resilience into the future. This plan should mandate as part of the Socio-economic duty, all local authorities to have local (healthy and sustainable) food plans developed and overseen by local cross sector food partnerships (including farmers) and should ensure public procurement is a key element.**

**Edible horticulture in Wales demonstrates this urgent need for food systems thinking to ensure future diversity and resilience in the food system.** [Fruit and vegetables](#) are a major part of a healthy diet – government [dietary advice](#) says they should make up 40% of what an adult eats (by weight of consumed food). But we don't eat enough of them and decades of the '5 a day' campaign has not made a difference. Fruit and veg consumption is now the [biggest marker of dietary inequality](#) where we see the greatest difference between the diets of the rich and the poor.

Yet in Wales we are only producing ¼ of a portion per day per head of population on 0.01% of the land (Wheeler 2019). With 19 countries currently imposing export restrictions, availability of fruit and veg into the summer months is concerning. In the two weeks following the lockdown 53% people in Wales were worried about accessing sufficient fruit and Veg, the highest figure in the UK (YouGov data collected by the Food Foundation).

In response to the pandemic there was a huge [surge in demand for Veg boxes](#). Sales increased by 111% in the first six weeks, but they could have increased more. 82% of UK box schemes now have waiting lists and are closed to new orders. The average box scheme waiting list is 160. It is difficult for schemes to estimate how many customers they are turning away, but many think the number is in the hundreds. In Wales [research by](#) Cardiff University, Food Sense Wales and Tyfu Cymru has shown a similar trend.

There has been a comparative lack of investment in horticulture in the UK which has meant that the sector has not thrived as it might. Since EU Common Agriculture Policy reform in 2003, farmers have been subsidised to produce food through direct payments based on land area, but in the UK subsidies were not made available to farms under five hectares. This means that, as horticultural businesses tend to be smaller, they have received on average one of the smallest amounts of subsidy of any farm type and many have received none at all. According to DEFRA's [analysis](#) of Farm Business Income (from 2014 to 2017), government subsidy accounted for 10% of the income of horticulture holdings, versus 79% for cereal producers. Fruit and vegetable production therefore, particularly production on under five hectares, has been underinvested compared to other farming sectors for at least 17 years. This, despite the fact that [fruit and vegetables](#), with the possible exception of oily fish, are the only food group of which the government recommends we eat more.

In order to upscale reach veg box providers say they need investment in infrastructure (for polytunnels, storage, delivery vehicles and so on).

There are an estimated 200 fruit and veg producers in Wales, 120 of which are small scale and 34 are box schemes (TyfuCymru baseline 2020 by Wheeler).

**What would we need in the case of another pandemic/ what would help?** If every town over 2000 people in Wales (and more for cities) had a veg box or CSA scheme we would require 265 such schemes (Wheeler 2019). This could be part of a broader picture of greater fruit and veg production at many scales. It would only take 2% of land in Wales to grow 5 a day and yet this would provide greater resilience in terms of environment (Veg Facts 2017) and diversity of farm income. It would involve thousands more small scale producers and tens more large scale producers (TyfuCymru baseline 2020 by Wheeler). **Financial output from horticulture, if production increased to 2% of land growing fruit and veg, could rise from the current £22m to an estimated £475 million - putting it above sheep and cattle output but slightly below milk.**

**Wales needs a comprehensive new fruit and veg action plan with commitment to investment in infrastructure.** Cardiff University, Peas Please, Food Sense Wales and Tyfu Cymru have been convening fruit and veg producers and there is a mechanism here to facilitate the development of a plan but it needs endorsement by Government and a commitment to invest in the infrastructure required for the sector to thrive and be there for the Welsh population in times of need. Investment in horticulture in Wales, through a horticulture plan, is fundamental to the Foundational economy of food in Wales.

*May 2020*