

# Feasibility study into the scope for promoting local food initiatives in North West Wales



*February 2003*

prepared by  
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## **Executive summary**

Sustainable development is a phrase which now peppers policy documents, from EC directives through to local councils. What does it mean in reality? For many, the vision includes an economy fuelled by local trading links, beneficial partnerships between local businesses and consumers, and systems which help to deliver real social and environmental benefits.

Local food is one of the tools that can turn the vision into reality. Projects throughout the UK, and in other countries, are demonstrating how local food systems strengthen the local economy, conserve the distinctiveness of the landscape, protect rural employment, and contribute to better nutrition and access to fresh food for local communities.

This potential is now recognised widely with increasing interest and support for local food initiatives in Brussels, Whitehall and Cardiff. Locally, in NW Wales the activities of Menter Mon, and others are offering a lifeline to threatened rural businesses. In parallel, a number of innovative schemes have been developed linking better health to the accessibility of fresh nutritious food.

A brief study by the Foundation for Local Food Initiatives for The Farmers' Market Network Rhwydwaith Marchnad Ffermwyr Cyf, during the summer and autumn of 2002, began to explore the opportunities for developing the local food economy in North West Wales. Stakeholders from diverse backgrounds were brought together to brainstorm a vision for local products in the Anglesey, Conwy, and Gwynedd areas. An action plan has begun to emerge from this process.

A key next step is to develop links between all parties and raise awareness of the benefits of local products systems. This could be modelled on the Food Links organisations which are making a significant difference in other parts of the UK. Devon Food Links estimates that in its first 2 years it has helped create 113 new jobs, whilst in Powys the Food Links team is helping to get fresh healthy food into local hospitals by setting up direct supply contracts with local producers. In other places, schools are growing their own fruit and vegetables, and in Cumbria boxes of local seasonal vegetables are being delivered direct to low income families.

North West Wales has many advantages to help it develop a vibrant local food economy. The diversity of the landscape and its mild climate offers the potential to produce a wide range of food and other products. A number of organizations and individuals in the region have set up pioneering projects and links, indications that much can be done.



However, a lot of work is needed. The potential benefits need to be demonstrated, support from all sectors needs to be encouraged, and realistic projects need to be developed. Creating a healthy local food economy requires the right infrastructure, and a willingness to participate. **This is no small task, but the opportunities are significant, and are waiting to be taken.**

**The key proposal is therefore to set up North West Wales Food Links, an organisation to co-ordinate and promote activity in North West Wales.** Initially the organisation might develop projects and opportunities to increase the availability of local food to underpin three core objectives:

- To improve health, nutrition and an understanding of their link with diet and offer better access to fresh food especially to low income communities;
- To promote tourism through the food offered in hotel, self catering and bed and breakfast accommodation, restaurants and retail outlets;
- To supply public sector establishments including schools, hospitals and local authorities with locally sourced food.

The initial tasks will be to:

- build on existing pioneering initiatives and outlets promoting local food
  - encourage and support local producers to increase the range of local produce, especially in horticulture
  - work closely with a wide range of stakeholders and organisations involved in farming, rural regeneration, economic development, environmental management, health and community projects
  - set up regular forum meetings and facilitate new communication channels
  - develop awareness-raising projects
  - develop marketing campaigns, especially aimed at retailers and the catering and tourism market
  - help develop the infrastructure for collaborative distribution, processing and marketing
  - develop partnerships between producers/producer groups and purchasers including public sector caterers
  - integrate existing initiatives, such as the farmers' markets, with other projects, which will ensure easy access to affordable, fresh local food for local communities

With support and funding it will be possible to achieve these goals. Partners are needed to turn the vision into reality and take the first steps towards building a healthy local food economy in NW Wales.

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Prepared with support from Enfys and Barclays Regeneration Fund.

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*'providing research and consultancy services to the local food sector'*

February 2003

## Introduction to the study

This study aimed to identify the opportunities for the development and promotion of the local food sector in NW Wales, defined as Anglesey, Gwynedd and western Conwy.

The brief called for the consultants 'to investigate how a project, working with existing agencies, to promote local production and consumption of healthy foods might benefit the local population, consisting of both producers and consumers.'

The study aimed to identify how promotion of local food initiatives could enable the production of a wider range of fresh food, and find ways to provide nutritious food directly to local people, especially those in more deprived areas and among the young. In parallel, the study aimed to look at the role of education and tourism in the local products sector.

The consultants were asked to work with those promoting education, health, tourism, and economic regeneration, especially agriculture.

The study was commissioned by The Farmers' Market Network Rhwydwaith Marchnad Ffermwyr Cyf, who obtained funding for the study. The Farmers' Market Network is a not-for-profit co-operative of local farmers and producers in North West Wales set up to promote and provide access to local food for local people.

The work was carried out by f3, the Foundation for Local Food Initiatives, a not-for-profit organisation providing research and consultancy services to the local food sector in the UK.

The study involved a wide range of local stakeholders through workshops and interviews. A first stage in the study was to hold a workshop with a Steering Group, representing a number of key organisations in the area. This workshop set the context for the next stage, a questionnaire survey of a wider range of stakeholders, using a set of questions raised at the first workshop. An interim report setting out the issues, opportunities and constraints as defined by the stakeholders was used as the basis for a final workshop. Here a vision for the local food sector was developed and potential action areas defined.

This report summarises the findings of the research and the outputs of the workshops and questionnaires. It concludes with an outline action plan, which defines the action areas and individual projects. Each project includes a description, a list of potential partners and funding sources, and reference to similar projects where information or help might be sought.

### **What is local food?**

**Local food** can be defined as 'food which is produced, processed, and traded within a certain specified distance, usually 30 mile radius, where direct links are common between producer and consumer.'

**Sustainable local food economies** have been defined as 'a system of producing, processing and trading, primarily of sustainable forms of food production, where the physical and economic activity is largely contained and controlled within the locality or region where it was produced, which delivers health, economic, environmental and social benefits to the people in those areas.'

## **A vision for the local food sector in NW Wales**

### *The development of the local food sector*

Local food has been recognised, over the last few years, for its potential contribution to economic regeneration, environmental management, health and social welfare. This recognition is reflected in policies of the UK government and Welsh Assembly:

*'what Wales therefore needs is an agriculture which delivers...distinctive local products as the basis for a cuisine which helps promote tourism....farmers can also sell locally, building up a local loyalties to their product on the strength of quality, traceability and pride in the locality. Local sales outlets could include local hotels and restaurants, local butchers and farmers markets'<sup>1</sup>*

A recent research report for the FLAIR<sup>2</sup> project identified the multiplicity of ways in which the sector operates. The key characteristics of the sector are the close links between the businesses, involved in production and processing and the consumers or consumer organisations. There is an emphasis on short food chains, which maintain trading activity within a local area, often defined as a 30 mile radius.

Direct marketing initiatives and distribution systems enable the producers and consumers to get closer together. These have included pioneer businesses such as farm shops, box schemes and farmers' markets. However, the cornerstone of most local food economies is the traditional independent retailer as well as wholesalers, with their networks of local suppliers.

Benefits are emerging particularly in terms of economic regeneration. This is due to the increased retention and circulation of money within the local economy. Local food initiatives often enable farms and rural businesses to maintain traditional activities or diversify and safeguard rural employment. This in turn helps retain the integrity of rural communities.

Social benefits are also significant, including improved diet and health through easier access to fresh food, as well as increasing social contact between urban and rural communities, and through the encouragement of initiatives such as community allotment schemes.

Local trading minimises the environmental impact of food transport, otherwise known as food miles, and helps minimise pollution and waste. There is evidence of improvements to environmental management on farms involved in the direct marketing to customers.

A number of common features characterise the development of a thriving local food sector. These include collaborative and co-operative systems, in both production and distribution. By working together, smaller scale and niche producers can successfully market, process and distribute their products. Similarly, the creation of

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<sup>1</sup> 'Farming for the Future, A new direction for farming in Wales', November 2001 - The Government of the National Assembly for Wales

<sup>2</sup> 'The Local Food Sector: Its Size and Potential', April 2002 - FLAIR (Food and Local Agriculture Information Resource, [www.localfood.org.uk/flair](http://www.localfood.org.uk/flair))

consumer groups and their participation in food projects helps build local capacity to find ways to get fresh healthy food to all sectors of the community.

### *The wider picture of agriculture in Wales*

The agricultural community in Wales has had a difficult time over the last few years. Recent floods and Foot and Mouth disease have combined to create a crisis for many farmers.

Statistics in The Rural Development Plan for Wales 2000-2006 show that smaller farms are being 'swallowed up' by bigger businesses, with a trend of increasing farm size. In hill farm areas, this is also accompanied by 'ranching', with consequent loss of vegetation cover and loss of homesteads. There is an unbalanced age structure, with an average age of principal farmers being 55 (1997), and an increase in part-time farming.

In the study area, comprising Anglesey, Gwynedd and Conwy, agriculture continues to be an important industry. Over 8,000 people are directly employed in agriculture, on a full or part-time basis. Whilst half the farmed land is under permanent grass, with lamb and beef as the principal products, there are limited areas of arable and small areas devoted to horticulture (see Appendix 4).

It is recognised that 'to survive as economic units many family farms are under considerable pressure to diversify into new enterprises both inside and outside agriculture'.<sup>3</sup>

The principles of sustainable development are at the heart of the strategy developed by the Assembly in November 2001; 'Farming for the Future: A new direction for farming in Wales'. The vision aims to produce:

- safe, healthy food and non-food products, produced with high standards of care for the environment and animal welfare and targeted much more closely at market opportunities to give farming families a better return;
- a countryside which is visually attractive and rich in its biodiversity, archaeology, history and culture, not only for its own sake but for peoples' enjoyment and to help support tourism;
- distinctive local food products as the basis for a cuisine which helps promote tourism; and
- through all of the above to contribute to a positive image of Wales in the world.

Some of the strengths of which rural Wales can boast include: a strong sense of community co-operation; an established tourism market; strong cultural and linguistic identity; an ability to produce high-quality lamb, beef and milk from grass; competitive wage rates; and, within the study area some good soil and conditions allowing diversity including horticultural production. Opportunities that have been identified include the scope for adding value to local products, developing local markets, and developing the social economy and community businesses.

The National Assembly for Wales has recognised the need for change and that Welsh farming must move in a new direction, based around competition focused less on price and more on quality. This will be addressed through initiatives at the larger

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<sup>3</sup> 'The Rural Development Plan for Wales 2000-2006' - National Assembly for Wales

commodity scale; by working with supermarkets to develop premium quality labelling; through adding value to meat products by processing; through export initiatives, and also through local sales outlets and Internet marketing. It has also been recognised that collaboration is essential if Welsh agriculture is to adapt.

Recently support has been given by the Assembly for work on public procurement projects, whereby food supply contracts for hospitals, schools and other public bodies will be sought from local producers.

### ***Current activity in North West Wales***

The local food sector is not yet well developed in the study area. However, a number of initiatives and early stages of the development of a local food economy are evident.

Activity on Anglesey appears to be most advanced, and is aided by Menter Mon, the LEADER project on the island. Menter Mon initiatives include:

- Cig Eidion Mon – Anglesey Beef promotion
- Primin Mon – a purpose built Food Hall built to raise awareness of local foods to visitors to the island
- Mon Mam Cymru – a series of promotional campaigns
- Mon Mam Cymru Food Initiatives – facilitation for co-operative working
- Anglesey Eggs – promoting and branding local free range eggs
- Other projects, grants and help for the agricultural sector

The WDA's Agrifood Partnership is also a key player in helping Welsh producers to develop their capacity and find new markets. On a local level, projects have included:

- Farm development Antur Dwyrdd-Lyn – encouraging, for example, livestock farmers to diversify into vegetable production, aquaculture, and co-operative marketing
- Grants for the Slate Valleys and Bangor area to help with marketing and the development of new products
- CELTEC – the North Wales Training and Enterprise Council
- Marketing Cadwyn – the Cadwyn LEADER group marketing local food under the Celtic Cuisine brand

The farmers' market at Bangor Safeway supermarket runs fortnightly, and there is another at Colwyn Bay. At present only about six stalls are filled but the range of fresh produce is quite wide, including lamb, beef, goat's milk cheese, vegetables, bread and cakes. Local food is also available at WI stalls at markets in Llangefni and Amlwch. Vegetable box schemes operate out of Bethesda, Bethel, Bangor, Holyhead and Llangefni. Many local bakers distribute throughout the area and local meat can be found in a number of butchers.

Some interesting local supply projects are in place, such as a supply contract between a local butcher and 10 schools in Caernarfon.

A local produce shop 'Best of Anglesey' was set up at Holland Arms garden centre in 1999, and several small retailers work hard to source local products for their shelves.

A fairly unique arrangement is found at Safeway in Bangor, where local products such as cakes are given shelf space. The Best of Anglesey Shop will close on 31<sup>st</sup> Jan 2003 as it is no longer sustainable.

Some local bed and breakfast businesses, hotels and restaurants make a special effort to source food locally. This was promoted through the Taste of Wales campaign, but has not been facilitated in terms of distribution infrastructure, so take up of the scheme has been poor.

Projects promoting health and nutrition are also underway in Anglesey, linked to the development of better access to fresh food for low income families, such as the Calon Llan 'healthy heart' project.

Grass roots campaigns and action have been assisted by the work of Friends of the Earth, by organising local food events in pubs, and helping buyers find local producers through the compilation of a local directory (see appendix 3). This indicates the diversity of products which can be found locally. Menter Mon's Food Group has also produced a Suppliers Directory.

Barriers to the development of the local food sector were identified by stakeholders as, on the one hand, a lack of awareness of the opportunities in the minds of both producers and consumers, and on the other hand the lack of infrastructure to enable the development of the sector. In particular, the diversity and capacity of local producers was felt to be low, which is exacerbated by economies of scale and lack of co-ordination and collaboration. Physical infrastructure too is inadequate, in terms of meat processing capacity and distribution networks which could enable local supply contracts and easy access to local food for consumers.

## *A vision for local food in the study area*

One of the core aims of this study was to invite stakeholders from a wide range of areas of interest to develop a vision for the future local food sector in the area. This was addressed through a participative process, in two workshops and stakeholder interviews.

Some of the comments which stakeholders made included the following:

*'demand for local food is high and cannot be met at present - it justifies an increase in supply'* - local retailer

*'finding local sources can be difficult'* - local retailer

*'if demand is stimulated this will encourage and give confidence to producers'* - local producer

*'producers need to work collectively to get local supply contracts to the public sector'* - farming organisation

*'local councils and NHS Trusts have huge buying capacity'* - local authority

*'a lot more could be done to promote local produce such as hampers of local produce, promotion on menus, at markets, and for self-catering holidays'* - tourism outlet

*'it is a low-income area and the majority of consumers will buy the cheapest and most accessible food'* - health agency

*'there is a lack of education about local food'* - local health group

*'there is a lack of local organisation to encourage the process of capacity building'* - public agency

*'producers need help in marketing; promotion is a key area'* - public agency

These comments begin to underline some of the concerns and frustrations of local stakeholders. However, a positive tone was heard on many occasions, and many constructive ideas were fed into the process of defining a vision for the future, thriving, local food economy.

The first workshop helped to identify current activity and the key themes for research. The second workshop was used to help identify a number of action areas, based on the components of a vision which is described below. Some of the key components of the **vision for a local food economy** are as follows:

### **Collaborative working**

The need for **integration and collaboration** between all projects and interested parties was recognised as an essential ingredient in developing the local food economy. A co-ordinator and project manager would help enable new initiatives, and provide support to all projects, acting as a focal point and as a link to other organisations and funding bodies. A central thread of the

work would be to draw together a multi-sector partnership including those with remits for economic regeneration, health and community development, rural and environmental management, and farming.

The stakeholders felt that an organiser would be required for each of the three unitary authority areas to support local projects. A forum for co-ordination between the three areas would also be required to maximise potential for meeting local demand for produce. A website with information about producers, retailers and local projects could also be set up to serve NW Wales.

It was felt that a major **funding application** is required and might be sought through Objective 1. Other sources of funding should be sought to address individual project needs.

The co-ordinator(s) should also carry out **an audit** of all local producers/ products, and a more thorough survey of potential customers and produce outlets, to understand better the scope for local food activity. **Training needs** should also be assessed, which might include production skills through to direct marketing (note that about two years ago, a study was undertaken by Celtec, establishing the training needs in the food sector).

Under the WDA's Food Animateur programme all registered food premises across North West Wales (registered with the relevant Public Protection Departments within the County Councils) will be audited to establish where they are now and where they want to be in the future. Relevant industry support and grant packages will be brought to their attention.

There was also interest in developing a **local food centre**, which might enable collaborative and co-operative processing, packaging, labelling, marketing, and distribution. This would be a centre of excellence, and could also enable accreditation, in respect of quality or environmental standards, for local producers, retailers and other local food outlets. This would build on the licensed food processing facility at the Food Technology Centre in Llangefni. They offer use of food preparation halls as well as training, new product development work and product safety testing. Producers need to be made aware of these facilities.

**Distribution infrastructure**, in particular, was felt to be a key area for action, in order to minimise the need for travel by both producers and consumers and businesses.

Further studies should also be carried out to assess the local **abattoir** processing capacity. However, there is national over-capacity in the red meat sector in the UK; new abattoirs are unlikely to be assisted as the set up costs are extremely high. There is a need to forge closer links with abattoirs as the majority of them are tied up in contracts with the multiples.

The current active players in Anglesey are:

Welsh Country Foods, Gaerwen – lamb only (5,000/ day) Asda contract  
Lamia, Bodedern- beef, pork, lamb (Low throughput), private with shop  
Corwas, Amlwch - beef, pork, lamb (Low throughput), private with shop

In Gwynedd they are:

Cwmni Cig Arfon, Caernarfon – pork, beef, lamb (Supply Booker contract, local butchers)

In Conwy they are:

Conwy Valley Meats, Llanrwst - pork, beef, and lamb (Supply local butchers)  
Jones Bros, Wrexham – lamb, beef (pork?)

### **Supplying retailers, larger caterers and the public sector**

It was felt that there was great potential to develop **local supply systems** to serve a range of businesses and institutions; this would include small shops, supermarkets, and public sector caterers including those in hospitals and schools, and private sector organisations.

Local producers need to be helped to understand the tendering process especially for public procurement. Consistency of supply is required with the right volumes to meet these contracts.

Interesting work is in progress in Powys, where successful local supply contracts have been established with a number of smaller hospitals. This has been made possible through the interpretation of the best value principle, whereby cost is not necessarily the deciding factor in the tender process.

An issue which needs to be addressed is the **range of products** that can be sourced locally. At present there is good potential for lamb and beef, but much less for vegetables, fruit, fish, and other processed goods. The quantity and quality of locally available produce is also in question. In order to be able to offer a comprehensive local supply service, all these issues must be resolved. It may be necessary to **develop links** with other producer groups, outside the area, to offer a fuller range of produce, whilst local producers develop their capacity to supply a diverse and consistent range of products.

The opportunity to supply local products to **supermarkets** could also be further developed, using the example of Safeway in Bangor, where the store manager creates shelf space for local food. These products need to be packaged, bar coded and produced to agreed standards. The mutually beneficial agreement to hold a farmers' market in Safeway's car park also offers a model for other stores.

### **Tourism**

There was felt to be much benefit in developing **supply networks to tourism outlets** such as bed and breakfast and hotel accommodation, cafés, pubs and restaurants, and other visitor facilities such as ferries. Some initiatives have already been trialled in this area through the Taste of Wales scheme but have lacked adequate infrastructure to enable significant take-up.

One major opportunity within the tourism market is to **develop awareness** of the diversity and high-quality of local products. This would be both at the point of sale, and in developing the promotional profile for the area. Visitor activities could also be planned, such as a food trail around local producers and restaurants using local produce. This could also be linked to walking trails and cycle routes, which bring health and economic benefits.

Events such as local fairs offer an opportunity to promote local produce, even if this is not the primary focus of the event. For example, the Anglesey Oyster and Shellfish Festival offers a platform to promote other local products. It is held on the second weekend in October each year.

There is untapped potential for using local produce for conferences and national events held in the area, for example at the University in Bangor.

### **Education and awareness raising**

A key action area, linked to many activities, is , a programme of **education and awareness raising**. This would be manifested in many ways, from projects in **schools, youth and voluntary organisations and further education establishments, to health promotion and business development**.

In schools there could be a range of activities linked to various aspects of the curriculum, such as citizenship, history, and geography. Projects could include research into the historical change in agricultural activity, healthy eating and cooking skills, active projects involving food growing and composting in school grounds, and competitions in schools to cook with local produce. In further education there is a lot of scope for research into sustainable agricultural systems, from production through to distribution.

A range of **different media** will be needed to promote a strong message about local food. This will include printed material, such as a food directory, on-line data such as a database of local producers and local food outlets, and the creative use of newsletters, e-mail, and point of sale information. In addition first hand experiences such as food tasting and farm visits are valuable.

### **Economic development**

There was strong support for the concept of keeping money within the local economy. This **local multiplier effect** has been researched in other parts of the UK, and similar research in this area could help support the case for investment in the local food infrastructure and related projects.

It was felt that local trading links could be both the catalyst for rural regeneration and provide benefits to market towns and villages and a range of local businesses.

### **Health and community development**

A number of projects are running already with food as a focus. These could be further developed to include projects linking older people with young people around **food growing**; developing **healthy eating** policies in schools and other establishments; developing walking and cycling programmes linked to **visits to local producers; cooking and growing projects** for local communities; and links to healthy **living centres**.

It was felt important to address food poverty and the poor diets of many people in the area. This could be helped through the creation of food co-ops, which have been successfully developed in Cumbria and supply seasonal local vegetables at a low cost.

The results of research by organisations such as the Soil Association should be made easily available, bilingually wherever possible to build awareness of the need for healthy eating and the ways local food can contribute to this.

There are also significant opportunities for developing food projects in association with initiatives aimed at the intermediate labour market, such as projects for people with special needs to develop horticultural skills.

### **Farmers' markets**

Farmers' markets provide an important outlet for local produce in the area. Farmers' market activity could significantly increase if there were a wider network of producers able to attend, and if some of the **infrastructural and organisational needs** were met.

The markets might also act as **distribution and sales points** within the local area and when they reach a certain size, become an additional tourist attraction. For producers, they offer a shop front that can stimulate 'off market' sales.

The stakeholder survey, summarised in Appendix 2, notes the opportunities perceived by individuals who represent a cross-section of stakeholder groups. Constraints to the development of the sector are also noted. These comments are not necessarily representative, and wider research will be needed to understand fully the scope for local food development in the area.

## **Making it happen - setting up a 'food links' organisation**

An outline action plan has been drawn up to take forward the outline vision. The first key stage is the creation of North West Wales Food Links (NWWFL), an organisation to co-ordinate and promote activity in North West Wales.

Food Links organisations have been set up in a number of local areas around the UK. They can be set up as independent bodies, or hosted by local authorities, and have a remit to co-ordinate activity in all parts of the local food chain. They act as promoters and enablers, and project manage the development of new initiatives to develop direct trading links and better food access.

In the North West Wales area, an initial objective for the local food sector may be to develop projects and opportunities in three areas:

- health, nutrition and better access to fresh food for low income communities
- tourism accommodation and other outlets, and local catering establishments
- supply contracts with public sector establishments including schools, hospitals and local authorities

The initial tasks for will NWWFL be to:

- work closely with a wide range of stakeholders and organisations involved in farming, rural regeneration, economic development, environmental management, health and community projects
- set up regular forum meetings and facilitate new communication channels
- develop awareness-raising projects
- develop marketing campaigns, especially aimed at retailers and the catering and tourism market
- help develop the infrastructure for collaborative distribution, processing and marketing
- develop partnerships between producers/producer groups and purchasers including public sector caterers
- integrate existing initiatives, such as the farmers' markets, with other projects which will ensure easy access to affordable, fresh local food for local communities

Each of the action areas and individual projects defined in the stakeholder vision are explored (see Appendix 1). Actions have been defined for:

- local food infrastructure
- supplying retailers, larger caterers and the public sector
- tourism
- education and awareness raising
- economic development
- health and community development
- farmers' markets

Each project includes a description, a list of potential partners and funding sources, and reference to similar projects where information or help might be sought (see Appendix 5).