



Welsh Fruit and Veg Production

2020

Baseline study for Tyfu Cymru by Dr. Amber Wheeler



Cronfa Amaethyddol Ewrop ar
gyfer Datblygu Gwledig
Ewrop yn Buddsoddi mewn Ardaloedd Gwledig
European Agricultural Fund for
Rural Development:
Europe Investing in Rural Areas



Llywodraeth Cymru
Welsh Government

How many commercial fruit and veg producers are there in Wales?

204, of which:

- **120 are small-scale** (117 under 5 ha, 3 producers 5-10 ha)
 - 7 are new start-ups
 - 82 are active producers with 34 providing box schemes (7 of which CSAs)
 - 31 did not complete the survey but are likely to be in this category
- **25 are large-scale** (over 10 ha) Puffin producers
- **31 are vineyards** for wine
- **28 are blackcurrant and apple and pear producers** for Perry and Cider

Crops Grown



- A diverse mixture of fruit and vegetables (between 25 and 65 different varieties) grown by 120 small-scale producers
- Soft fruit at a large scale
- Mushrooms
- Potatoes, brassicas and leeks at a large scale
- Grapes for wine in vineyards
- Apples and Pears

Volume/ area



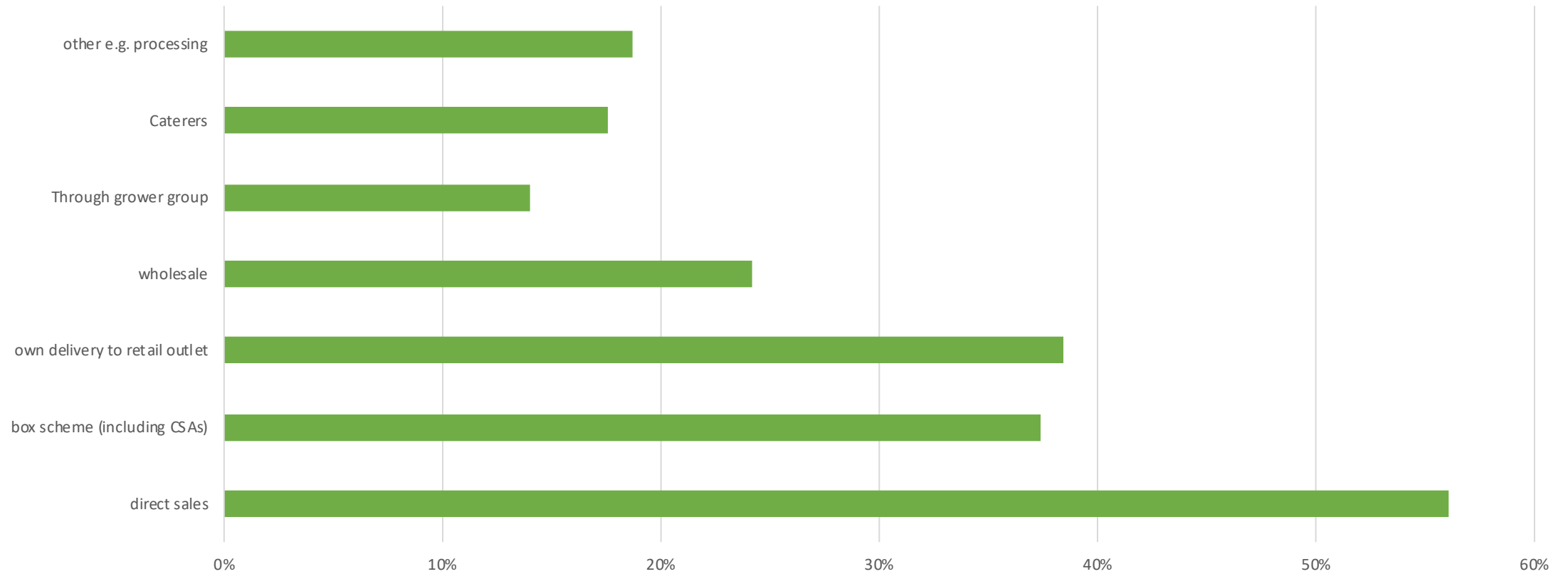
- Volume: Not possible to ascertain as data not routinely collected

AREA	Hectares (est)
120 mixed small-scale production	216
Soft fruit (blackcurrants)	53
25 large-scale Puffin producers brassicas and leeks. Puffin also grow potatoes on 1200 hectares but the figures for potatoes are separated out here as they are not classed as vegetable under public health guidance.	618
31 are vineyards for wine	60
28 are blackcurrant and apple and pear producers for Perry and Cider	250
Total Outdoors	1,197
Undercover	44
Total area	1241

Routes to market



Routes to market



What's going well?



- Small scale producers growing diverse crops experiencing higher awareness and value of product by customer and increased demand for all local and seasonal veg. Box schemes have waiting lists, organic and local food in demand through this distribution method.
- Many local chefs are asking for local and diverse produce and this is also driving demand. Leafy crops and unusual salads and herbs were mentioned most often as possible crops to expand on.
- Many producers are adding value to veg by processing for example into chutneys, herbal teas (herbs), fermented veg, smoked garlic, mushroom products, frozen desserts, ice lollies, juices, fruit syrups as well as jam.
- Soft fruit was also mentioned as being in demand, strawberries, rhubarb and blackcurrants specifically.
- Large scale production through Puffin

Constraints



- Lack of Government investment compared to other sectors meaning small scale producers struggle with unlevel playing field
- Lack of a coherent vision or integrated plan for the sector
- Lack of growing and or marketing expertise, usually amongst incoming, smaller producers

Wales Population fruit and veg Requirement

- This report estimated that Wales is producing 19,551 tonnes of fruit and veg per annum on 931 hectares of land – 0.1% of total land
- ‘5 a day’ fruit and vegetable requirement of the Welsh population is 566,803 tonnes per year
- Wales produces enough to supply only $\frac{1}{4}$ of a portion per head of population per day
- To produce ‘5 a day’ for Welsh population would need 29 times more land
- 931 hectares to 26,991 hectares – 2% of total land

Number of producers to produce '5 a day'



- Small scale producers this would involve going from 120 to 3,480 producers.
- Large scale producers like Puffin, who anticipate with their current producers they could upscale 10 times, might go from 25 to 75 producers

These are ambitious figures and act as a stimulus for discussion of possibilities for up-scaling of Welsh production and the mechanisms needed to do this.

Final comments



The Welsh fruit and veg sector has great potential to develop with a core group of dedicated producers and plenty of demand for produce. Planning and investment in the sector could see numbers of producers and fantastic Welsh production vastly expanded to the benefit of local businesses and the health of the nation of a whole.

