



Commercial Horticulture Plan 2020



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Executive summary: Commercial Horticulture in Wales, Delivering for future generations

Horticulture is a key growth sector for Welsh Government. It is essential to delivering the objectives of Rural Development Plan for Wales and has contributed to meeting the ambition to grow the food and drinks sector by 30% in 2020, increasing industry turnover to £7billion.

But this is not about growth at any cost. Access to natural and finite resources, such as land, energy and water, are vital to growing edible and ornamental produce. Management of these natural resources will be prioritised, through the Sustainable Farming Scheme, with farm payments aligned with sustainable land practices that respond to the climate emergency and reverse biodiversity decline.

Furthermore, the new Strategic Plan for the Food & Drink Industry in Wales proposes to take forward a commitment to developing the skills of the workforce, using resources sustainably, addressing public health, aswell as meeting sustainable brand values that aim to enhance Brand Wales.

The current pandemic has also highlighted a reliance on global supply chains and placed more emphasis on an already significant and growing consumer demand for provenance, and the need for shorter supply chains, increasing resilience in primary production and rural communities.

Boosting horticulture farming is key to the Welsh Government's plans to emerge from the coronavirus pandemic and identified by their Green Recovery Taskforce as a route to accelerating Wales' transition to a low-carbon economy and a healthier, more equal nation.

The horticulture industry in Wales is well positioned to deliver on these combined policy challenges and opens-up commercial opportunities for farms to diversify into horticulture and more land to be accessed for the sector to expand.

Lead by Tyfu Cymru, a project managed by Lantra, and with funding from the Welsh Government Cooperation and Supply Chain Development scheme, this Commercial Horticulture Action Plan for Wales outlines **a multi-stakeholder, whole supply chain, approach to develop and sustain the commercial production of edible and ornamental horticulture produce in Wales for the long term.**

It draws on our experience of building the skills necessary to enhance the capacity and capability of the industry. It aims to scale-up proven achievements that will continue to benefit Welsh horticulture businesses. **It responds to both immediate needs and provides leadership to equip businesses with the knowledge and practical skills for green and inclusive growth supported by applied research and appropriate use of technology.**

To achieve this, it is crucial that the horticulture industry in Wales can demonstrate how it delivers on the goals of the Well-Being of Future Generations (Wales) Act 2015 and the Environment (Wales) Act 2016 and by **ensuring the industry adopts practices that support natural resource management, biodiversity, circular economy, public health and contribute to the economic regeneration of rural Wales.**

Work is underway to demonstrate and report on how Tyfu Cymru activities are enabling the industry to contribute to these strategic goals.



About Tyfu Cymru: Scaling up for good

The Tyfu Cymru project has been established since 2017 to support the commercial horticulture sector and Welsh Government to realise its ambitious objectives for growth and rural regeneration through the innovative and sustainable development of the horticulture industry in Wales.

Our initial baseline research was done in consultation with industry. This identified some key opportunities and challenges facing the sector and indicated where horticulture businesses might benefit from industry tailored support and intervention. These findings, coupled with our business diagnostics and ongoing scanning to interpret changing policy, market, environmental and social drivers, provide a focus for several key activities.

The following activities are currently underway and designed to respond to both immediate business needs and to provide leadership to sustain the development of the sector for the long term.

1. a combination of commercial and technical training and support, delivered through a Knowledge Hub, Grower Networks and a Horticulture Professional Development Programme.
2. a database of, and engagement with, 450 horticulture businesses spanning the supply chain in Wales
3. a multi-stakeholder approach, involving policy, industry, academia and sector specialists, establishing an RDP collaboration group, sharing experiences with 3rd sector groups, and providing a 'single voice' for the sector.

This new Horticulture Action Plan for Wales is intended to build on these findings and detail the steps to scale up these achievements in ways that will continue to benefit Welsh horticulture businesses and meet the strategic goals of the Welsh Government. It refers to both edible and ornamental horticulture.



Tyfu Cymru: tailoring flexible support for the long-term sustainability of the commercial horticulture industry in Wales. Since its launch in 2017, Tyfu Cymru has delivered capacity building training and dedicated support to 100s of growers, wholesalers and retailers in the horticulture supply chain. In doing so they have developed significant in-house expertise by equipping horticulture businesses with the skills necessary to ensure the long-term sustainability of the horticulture industry in Wales.

The online Knowledge Hub is a key part of the Tyfu Cymru project. It contains a series of evidence based articles and resources based around a range of key themes that respond to business needs, whilst offering leadership on topics that will help prepare the industry for uncertainties that lie ahead. The primary audience is Welsh grower businesses, whilst policymakers and wider industry groups are also catered for.

Key themes include: Future proofing, Water use, Resource efficiency, Threats from pests and disease, Soil & land classification, Knowledge of the marketplace, Communication, Collaboration, New technology & innovative growing, Access to land

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Tyfu Cymru Networks is another element of the project. Whereby, Welsh growers are invited to join regular, free workshops and online discussion groups to take advantage of commercial opportunities, specialist talks and study visits that are geared to address the common challenges that these businesses face. These Networks will provide a platform for joined-up thinking across the industry, aim to inform Welsh Government policy, improve capability amongst businesses to overcome barriers to growth, extend reach into new markets and build resilience in individual growers, the sector in Wales and beyond.

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Tyfu Cymru Horticulture Professional Development Programme aims to future proof the horticulture industry in Wales. It will do this by providing relevant training to equip horticulture businesses with the commercial skills that are necessary to capitalise on opportunities for growth. Participants from eligible businesses will gain access to a tailored programme of masterclasses and leadership coaching, delivered by Tyfu Cymru and their network of sector specialists.

Masterclasses include: Leadership, Strategy and visioning, Business development and funding, Strategic marketing, Employing, retaining and managing people, Digital, web and social media, Managing change and innovation, Packaging and process efficiency, Supply chain management, Succession planning.

Fit for the future: A roadmap for horticulture in Wales

The Commercial Horticulture Action Plan for Wales contains 4 priority work-streams that respond to our ongoing research and consultations with industry. They aim to equip grower and producer owned horticulture companies across Wales with the capacity and capability for business development and growth and to demonstrate how the industry contributes to achieving strategic policy goals.

Delivered in partnership with stakeholders and with funding from the Welsh Government these work-streams provide a blend of strategic leadership, skills development, training and support tailored to support both immediate business needs and to sustain the development of the sector for the long term. By adapting to evidence gained from ongoing horizon scanning and analysis of business diagnostics, this approach delivers social, environmental and commercial benefits for business and the Welsh economy.

Workstream 1: People and Skills

Identifying skills needs of Welsh commercial horticulture businesses and providing training and skills development for the sector to enable businesses to be more productive, profitable and prepared for challenges ahead.

Workstream 2: Business and Investment

Preparing growers and producer owned horticulture companies across Wales to adapt to commercial challenges and be ready for market opportunities.

Workstream 3: Customers and Markets

Ensuring existing markets are protected and emerging markets can be capitalised upon.

Workstream 4: Communication and Engagement

Integrating all work streams to enable their aims to be met.

Tailored industry support: A 3 step plan

All businesses that access training and support are invited to complete a diagnostic of their current performance. This ensures that they are directed to the appropriate work-streams and receive the right level of support.

1.

Step 1: Engagement

Each business completes a diagnostic.

Analysis directs them to appropriate workstreams.

2.

Step 2: Implementation

Work-stream 1: People & Skills

Work-stream 2: Business & Investment

Work-stream 3: Customers and Markets

Work-stream 4: Communication & Engagement

3.

Step 3: Outcomes

Each work-stream is designed to meet specific KPIs including resilience, health benefits, biodiversity & reduced GHG emissions.

This ensures all outcomes benefit industry, the economy of rural Wales & future generations.

Each work-stream will deliver key objectives for ornamental and edible commercial horticulture businesses. These are described below along with how they will be delivered and by whom. Welsh Government has committed funding for Tyfu Cymru until 2023, with many of these activities already underway and ongoing. A multi-stakeholder approach is required to deliver many of these objectives, involving policy, industry, academia and sector specialists as well as other RDP projects and 3rd sector groups. Stakeholder groups are assigned to each objective and measures are listed for indicative purposes only.

Workstream 1: People and Skills

Intended Outcome: identify skills needs of Welsh commercial horticulture businesses and then provide training and skills development for the sector to enable businesses to be more productive, profitable and prepared for challenges ahead.

Key Objectives	Delivered through	By Whom	Measure
Design an industry led training and skills programme offering both technical and business development opportunities for commercial growers	<p>horizon scanning to interpret policy, market, environmental and social drivers</p> <p>diagnostic tools to assess horticulture businesses skill gaps and training needs</p> <p>support provision for immediate business defined needs</p> <p>leadership coaching for long term sustainability</p>	<p>Tyfu Cymru</p> <p>Sector specialists</p>	<p>Businesses assessed</p> <p>Training days</p> <p>Evaluation of outcomes / benefits</p>
Develop horticulture business networks	<p>Grower Networks within the Tyfu Cymru project allow Welsh growers to join regular, free workshops and online discussion groups to take advantage of commercial opportunities, specialist talks and study visits that are geared to address the common challenges that these businesses face.</p>	<p>Tyfu Cymru</p> <p>RDP projects</p> <p>Farming connect</p> <p>Cluster 201 WG Food Division</p>	<p>Networks formed</p> <p>Delegates participating</p> <p>Evaluation of outcomes / benefits</p>

Key Objectives	Delivered through	By Whom	Measure
Inspire the Horticulture leaders of the future	<p>Horticulture Professional Development Programme, benchmarked against CPD programmes internationally (including AHDB SmartHort)</p> <p>Create a category in the Lantra Awards for commercial horticulture businesses demonstrating commitment to training</p> <p>Commit to Ambassadors for the horticulture industry.</p>	<p>TyfuCymru</p> <p>Lantra</p> <p>Sector specialists</p>	<p>Businesses receiving training</p> <p>Evaluation of outcomes / benefits</p> <p>Lantra Awards Nominees</p> <p>Ambassadors</p>
Future proof the Welsh horticulture industry against socio economic, environmental challenges and uncertainties	Working with industry and Welsh Government to determine and address changing industry skills needs including organics, farm diversification, substitute crops and products, labour challenges and implement opportunities to mitigate climate change	<p>Tyfu Cymru</p> <p>Welsh Government</p> <p>Academia</p> <p>Sector specialists</p>	<p>Actions agreed</p> <p>Actions delivered</p> <p>Evaluation of outcomes / benefits</p>
Develop consultancy framework for grower businesses to access external expertise	A pool of specialists will be recruited on an ongoing basis via Dynamic Purchasing System on Sell2Wales to respond to and deliver against changing business needs such as agronomy advice, efficient production methods and routes to market including retail, wholesale and direct	Tyfu Cymru	<p>Specialists assigned</p> <p>Evaluation of outcomes / benefits</p>

Workstream 2: Business and Investment

Intended Outcome: Prepare growers and producer owned horticulture companies across Wales to adapt to commercial challenges and position them to capitalise on market opportunities for business development and growth.

Key Objectives	Delivered through	By Whom	Measure
Stimulate growth in primary production – develop capacity and capability of the commercial horticulture sector	<p>Identify opportunities for growth and provide support to businesses in the industry to scale up and take advantage</p> <p>Identify where investment is needed, potential sources and funding gaps</p> <p>Identify the areas in Wales suitable for horticulture – WG Agricultural Land Classification 2020</p>	<p>Tyfu Cymru</p> <p>RDP projects</p>	<p>Businesses receiving support</p> <p>Businesses receiving investment</p> <p>Land diversified / use</p>

Key Objectives	Delivered through	By Whom	Measure
Identify real and perceived industry challenges and opportunities over the next five years	<p>Grower survey</p> <p>Evaluation of findings against associated KPIs delivery</p> <p>Horizon scanning to interpret policy, market, environmental and social drivers</p> <p>Reporting how Tyfu Cymru activities are enabling the industry to contribute to Well-Being Goals.</p>	Tyfu Cymru	<p>Businesses completing survey</p> <p>KPIs met</p> <p>New KPIs identified</p>
Increased uptake of high quality information and business support by horticultural businesses	<p>Development of online Knowledge Hub</p> <p>Link and signposting to broader Welsh Government support programmes such as Business Wales</p>	<p>Tyfu Cymru</p> <p>Welsh Government</p>	<p>Businesses accessing online support</p> <p>Business referrals</p>
Improve efficiency of horticulture production	High end CPD targeted training program focused on technological, environmental and operational efficiency	<p>TyfuCymru</p> <p>Higher Education Institutions</p>	<p>Businesses receiving training</p> <p>Evaluation of outcomes / benefits</p>

Key Objectives	Delivered through	By Whom	Measure
Enhanced access for horticultural businesses to farm business grants and other mainstream Welsh Government services and resources	<p>Enhanced support for technical and commercial challenges including processing, packaging, sales and distribution.</p> <p>Map Welsh Government business support and grants for horticulture Map UK funding schemes for horticulture</p> <p>Engagement with Sustainable Farming Scheme</p>	<p>Tyfu Cymru</p> <p>RDP projects</p> <p>Welsh Government</p>	<p>Businesses receiving support</p> <p>Businesses applying for grants</p> <p>Businesses adopting sustainable practices / type</p>
Cross Border investment into Wales	Matchmaker programme to engage with the larger companies that could benefit development of Welsh horticulture supply chain	<p>Tyfu Cymru</p> <p>Welsh Government</p>	Businesses linked in
Identify Horticulture “Anchor companies”	Develop a mechanism to prioritise key account management for regional businesses that bring value and enable sustainability.	<p>Tyfu Cymru</p> <p>Welsh Government</p>	Key accounts established

Workstream 3: Customers and Markets

Intended Outcome: to ensure existing markets are protected and emerging markets can be capitalised upon.

Key Objectives	Delivered through	By Whom	Measure
<p>To capitalise on opportunities with new, emerging, local and alternative markets.</p>	<p>Enabling businesses to be supply ready.</p> <p>Encouraging shorter local supply chains.</p> <p>Promote provenance and quality of Welsh produce</p> <p>Link to Welsh tourism partners</p> <p>Define and promote sustainability credentials of Welsh horticulture industry and inform the work of WG Food Division on Sustainable Brand Values</p> <p>Meet the producer events - supplier to buyer and supplier to wholesaler</p>	<p>TyfuCymru</p> <p>RDP projects</p> <p>Project Helix</p> <p>Sector specialists</p>	<p>Businesses gaining new customers / sales</p> <p>Strategic sustainability reporting of goals adopted, and being met.</p> <p>Events held</p>

Key Objectives	Delivered through	By Whom	Measure
To anticipate future market trends and demand	<p>Scanning to identify and forecast new and emerging challenges and opportunities.</p> <p>Awareness raising activities to industry.</p>	Tyfu Cymru	<p>Comms delivered</p> <p>Events held</p>
To maximise digital opportunities for growers	Provide training opportunities and digital support	Tyfu Cymru Superfast Business Wales	<p>Businesses receiving support</p> <p>Training delivered</p> <p>Evaluation of outcomes / benefits</p>
To develop a trade supplier directory	<p>Create and maintain database of commercial Welsh horticulture businesses, explore potential to extend into supplier directory</p> <p>Show case Welsh products through supplier to buyer events.</p>	Tyfu Cymru	<p>Businesses included on database</p> <p>Buyers accessing directory</p> <p>Events held</p>
To stimulate green growth and build resilience in to supply chains	<p>Individual diagnostic with horticulture businesses</p> <p>Knowledge Hub focus themes</p> <p>Networks development</p> <p>Horticulture Professional Development Programme</p>	Tyfu Cymru Sector specialists	<p>Businesses assessed</p> <p>Delegates participating</p> <p>Evaluation of outcomes / benefits</p>

Workstream 4: Communication and Engagement

Intended Outcome: This is a cross cutting theme and will be integrated into all other work-streams to enable their aims to be met.

Key Objectives	Delivered through	By Whom	Measure
<p>Provide 'industry voice' for the commercial horticulture sector in Wales</p>	<p>Establishing clear communication routes between policy and industry</p> <p>Tyfu Cymru Communication and engagement Plan</p> <p>Online presence through Tyfu Cymru project website and social media.</p> <p>Infographic of RDP Funded horticulture project partners to identify support roadmap</p> <p>Grower Communication Plan to improve positioning of Welsh businesses</p> <p>Reporting how Tyfu Cymru activities are enabling the industry to contribute to Well-Being Goals</p>	<p>Tyfu Cymru</p> <p>RDP projects</p> <p>Industry, policy and 3rd sector groups</p>	<p>Plans published</p> <p>Meetings held</p> <p>Partners engaged</p> <p>Evaluation of outcomes / benefits</p>

Key Objectives	Delivered through	By Whom	Measure
Maintain up to date Labour Market Information relevant to the horticulture sector in Wales	<p>Current database of commercial Welsh horticulture businesses</p> <p>Baseline data survey for edible horticulture</p> <p>Labour requirements survey</p>	<p>Tyfu Cymru</p> <p>Welsh Government</p> <p>Industry and 3rd sector groups</p>	<p>Information shared and acted upon</p> <p>Outcomes communicated</p>
Celebrate the uniqueness and quality of Welsh produce	<p>Link to Brand Wales</p> <p>Link to Taste Wales (edibles only)</p>	<p>Tyfu Cymru</p> <p>Welsh Government</p>	<p>Brand values communicated and acted upon</p> <p>Presence at event</p>
Facilitate collaborative groups and opportunities	<p>Establish multi-stakeholder steering group</p> <p>Gain consensus for a vision for the sector</p> <p>Drive engagement and facilitate collaboration with associated RDP projects</p> <p>Produce a horticulture business support roadmap</p>	<p>Tyfu Cymru</p> <p>RDP projects</p> <p>Industry, academic, 3rd sector groups & sector specialists</p>	<p>Commitment and support of HAP</p>

Moving forwards: conclusions and next steps

This Commercial Horticulture Action Plan for Wales is intended to benefit Welsh horticulture business and meet the strategic goals of the Welsh Government. It aims to provide a blend of strategic leadership, skills development, training and support to enable the innovative and sustainable development of the horticulture industry in Wales.

It lays down a series of practical actions that aim to achieve this ambition through a multi stakeholder whole supply chain approach, involving policy, industry, academia, sector specialists and RDP delivery partners to support market development, promote inclusive growth and safeguard our natural resources. By drawing on evidence gained from ongoing industry focussed horizon scanning and analysis of business needs this Action Plan will remain adaptive to future uncertainties, challenges or opportunities including those posed by Brexit and Covid 19.

Furthermore, this Action Plan will demonstrate the social, environmental and commercial benefits for horticulture business and the Welsh economy by working towards the seven goals of the Well Being of Future Generations (Wales) Act 2015 and meeting the cross cutting themes of the Welsh Government Rural Development Programme.

