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Mapping Food Systems Across Bridgend

Bridgend County Borough Council

MAY 2024

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1. Introduction and background

In 2022 The Welsh Government Minister of Social Justice announced £3 million of funding to support the development of cross-sector food partnerships in response to the cost of living crisis. This funding:

- Supports the development of cross-sector food partnerships.
- Helps build resilience in local food networks through the co-ordination of on the ground, food-related activity.
- Helps to tackle the root-causes of food poverty.
- Develops citizen actions.
- Maximises the effectiveness of projects and ensures that resources are targeted at areas of greatest need.

Food Sense Wales currently supports 7 sustainable Food Places members in Wales:

- Food Cardiff
- Food Vale
- The Monmouthshire Food Partnership
- RCT Food
- Blaenau Gwent Food Partnership
- North Powys Food Partnership and
- Bwyd Sir Gâr Food in Carmarthenshire.

The organisation is also supporting new projects in Torfaen, Swansea and Bridgend.

Having secured the funding mentioned above, Bridgend County Borough Council (BCBC) is embarking on the Sustainable Food Places journey, with the recruitment of a Sustainable Food Officer in January 2024.

BCBC commissioned the BRO Partnership (BRO) to undertake this Food System Mapping exercise to look at the inter-connections between how we: produce, process, transport, buy, consume and dispose of the food we eat; and the way this affects us as individuals and communities. In other words, what is happening in our local food chain?

This research will help BCBC to inform and develop a more sustainable approach to food, from “field to bin.”

2. Methodology

BRO's research was undertaken between January and the end of April 2024. This was therefore a time-limited study and can only be considered as a snap-shot of the current situation regarding the food system in the County.

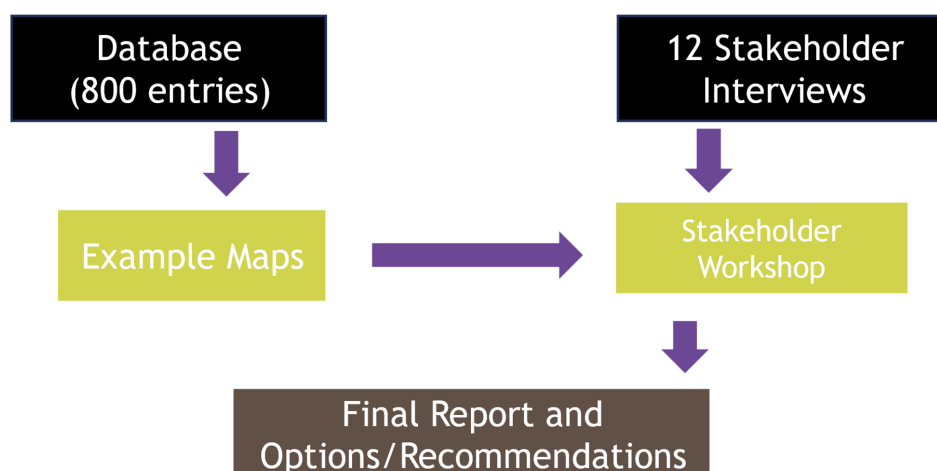
There were three main elements to the research:

- The collection of a detailed database, with some 800 entries, which was used to produce a series of maps. Further details on the methodology for creating the database is included in Annex 1 and a selection of maps is shown in Annex 4.
- The budget and time available included undertaking 11 interviews with a cross section of stakeholders. These were selected to cover a mixture of: producers, processors, procurement officers, food poverty initiatives, shops and hospitality business. The list of those interviewed is included in Annex 5.
- A workshop for stakeholders was held on the 9th April at Pencoed College. This provided an opportunity to discuss some of the early findings. The event was very well attended and a summary of the main points discussed is set out in Annex 6.

The diagram below shows how the different elements of the research have been used to inform this Final Report.



How we went about it



3. Sectoral Findings

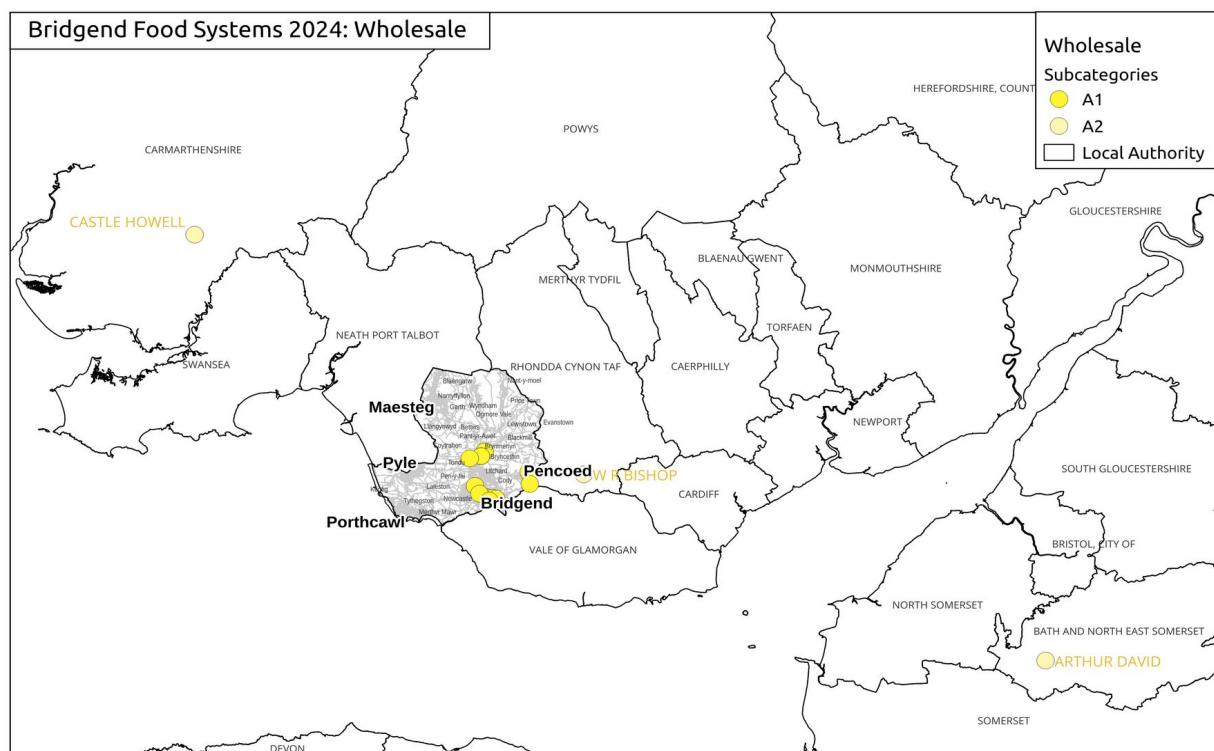
Based largely on the database, the following observations were derived on the different sectors within the County's Food System.

Wholesalers (Category A)

Much of the food supply to retailers, the hospitality trade, and school kitchens comes from wholesalers, and there are several operating in or near Bridgend. Their attitude to local sourcing is therefore key to the sustainability of the Bridgend food chain. Castell Howell is known for its support for local produce. Discussions with other wholesalers could be something for the Council to pursue at some point.

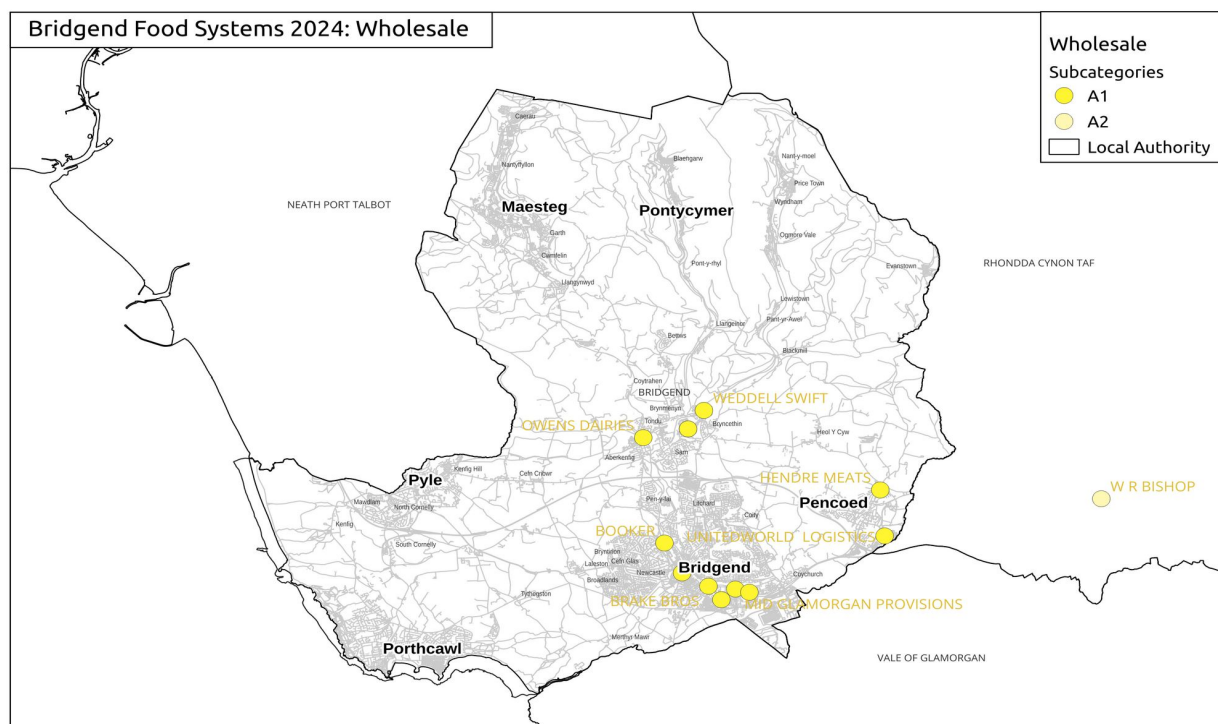
A: Wholesalers

Sub-Category	Total
A1 Based in Bridgend	13
A2 Based elsewhere (but supplying Bridgend in quantity)	3
All entries in Wholesalers	16



BRO Partnership, 2024. Basemapping & boundary data from ONS and OpenStreetMap.

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BRO Partnership, 2024. Basemapping & boundary data from ONS and OpenStreetMap.

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Retail (Category B)

Bridgend County is served by some 45 supermarkets and at least 85 corner shops/convenience stores. There are also some independent retailers specialising in certain products, e.g., ice cream.

The supermarkets are familiar corporate names, with Asda, Tesco, Co-op, Aldi and Lidl dominating. Sainsburys, Iceland, Megasave and Heron Foods are also represented. Waitrose and Marks & Spencer have one store each, in a neighbouring Borough. Filco is a smaller chain, very active in and around Bridgend County, with a commitment to local sourcing.

This reflects a familiar point in food sustainability discussions: that larger “corporates” dominate the supermarket sector, and their food purchasing strategy is determined well above Borough Council level. This makes it difficult to influence locally.

Arguably, corner shops and convenience stores are more independent, and therefore may be more willing to join a sustainable food initiative. However, it is worth noting that many of the 85 or so corner-shops in that Sub-Category in fact are part of large chains, or their individual ownership/franchise is partly subject to

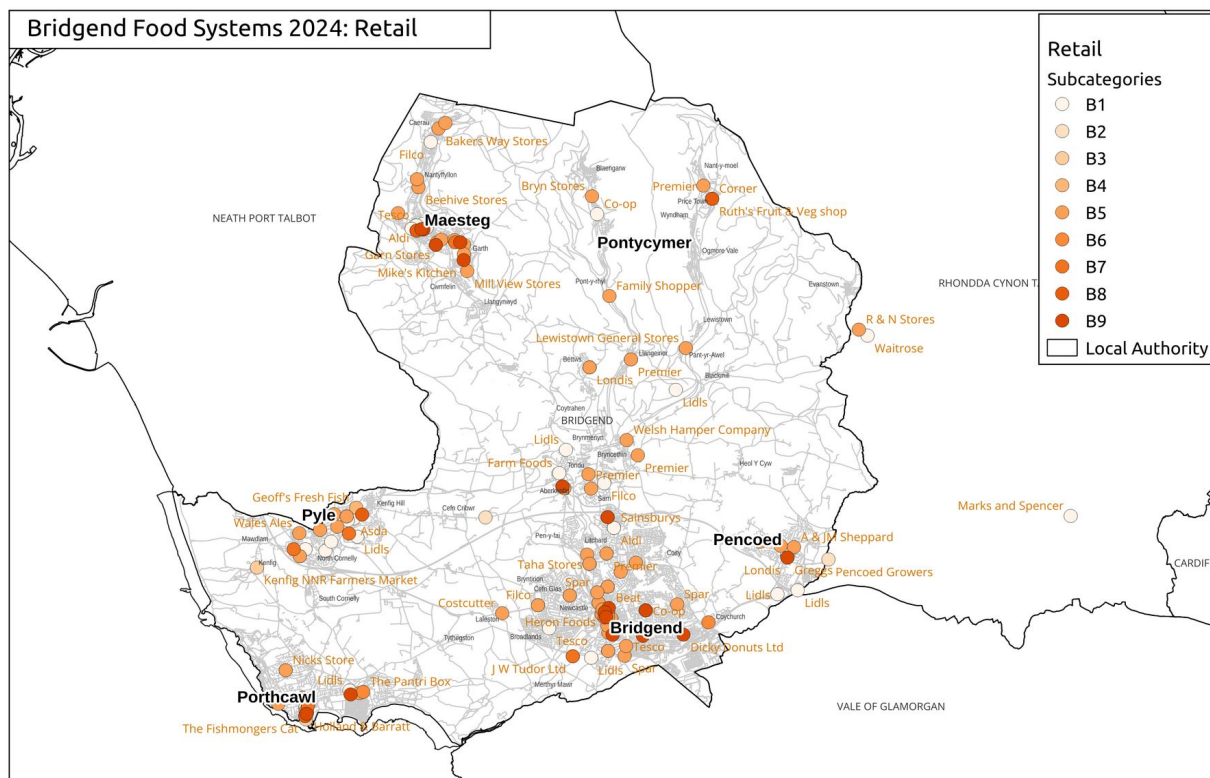
more corporate supply decisions, e.g., Premier, Family Shopper, McColls (Morrison's), Londis, Costcutter, Bargain Booze.

Some of those may have more independence in terms of taking small amounts of local produce, and so enquiries should be considered - but the results quite possibly may not be substantial, let alone “game-changing.”

Corner shops are also suppliers to Food Banks, and it is possible their contribution could be increased. It will depend in part on the logistical capacity of Food Banks to liaise with smaller stores. It may be worth exploring the willingness of the store chains like Premier at a senior level to establish co-operation with Food Banks as supermarkets have already done. *However: it may be that there is little left-over food available in such shops, they tend not to be as wasteful as larger supermarkets*

B: Retail

Sub-category	Total
B1 larger supermarkets	44
B2 farm shops	2
B3 farmers' markets	2
B4 wet fish shops	3
B5 corner shops/small convenience stores	86
B6 zero waste stores	3
B7 butchers	10
B8 fruit & vegetables	6
B9 bakers	19
All entries in Retail	175



BRO Partnership, 2024. Basemapping & boundary data from ONS and OpenStreetMap.

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Hospitality (Category C)

There are some 415 establishments listed in the database, offering food to eat in or take away (or both). The database concentrates on those in, or close to (approx.3 miles), the larger settlements. This reflects the way in which much of the hospitality sector has grown up historically, and continues to operate. It also offers the opportunity to consider how to make stronger connections between food establishments and local suppliers. This would be a “place-based” or “Food Hub” approach, shortening the food chain, reducing ‘food miles’, in and around the major Bridgend County settlements.

As the main population centre of Bridgend County, Bridgend Town inevitably has many opportunities. Indeed, Wales on-Line published an article in 2023, following up in Spring 2024, pointing out that there may be potential for a “Food Town” initiative in the town centre. Establishments mentioned in that article have been noted in the comments section of the database.

Porthcawl may have the same or greater potential, because of its long-established visitor trade. Porthcawl perhaps offers a new opportunity now with the extensive

regeneration plans underway, which will create hundreds of new homes near the Harbour, and therefore a new and very local customer base.

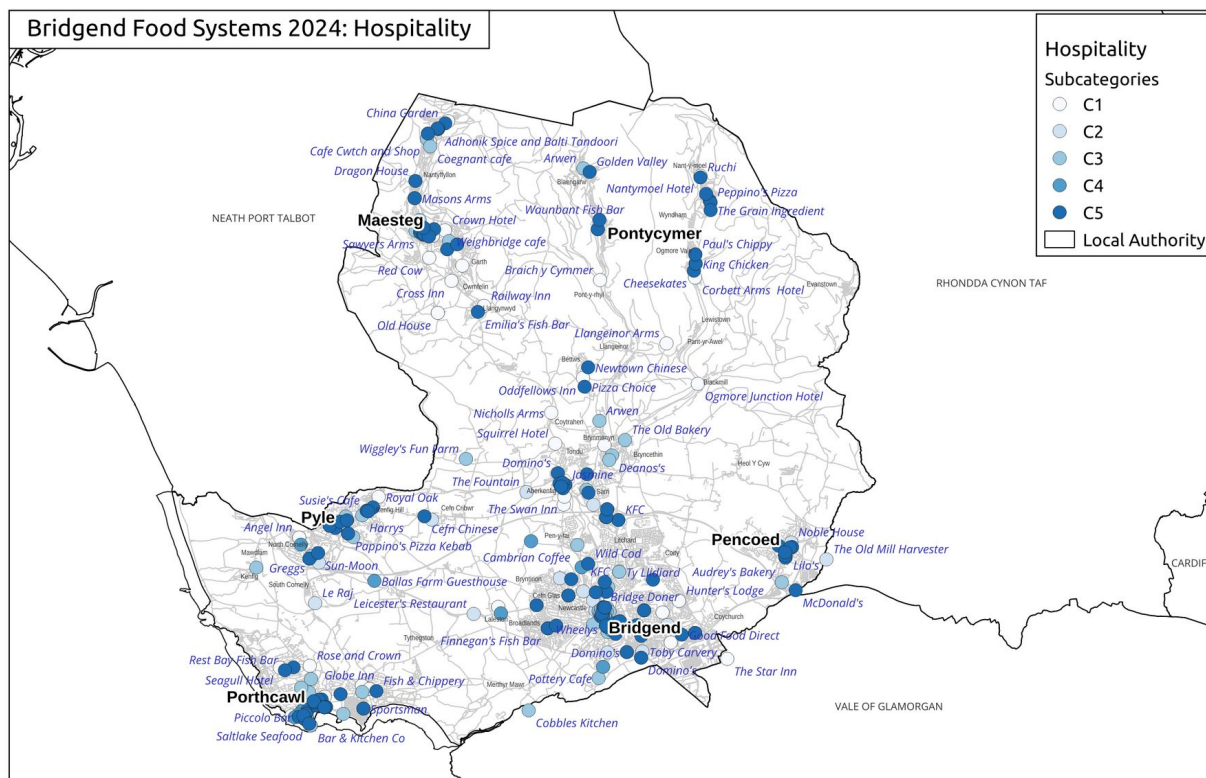
Maesteg also stands out as being relatively well-supplied, the ‘market town’ for the north-west of the borough and nearby valleys. And the Sarn Designer Outlet already includes a Food Hall . There also seems some potential for collaboration around Pyle/North Cornelly and also Pencoed.

Bridgend has several caravan sites, and larger sites in Wales typically have catering services on site (and occasionally, a convenience store). They also sit within a wider context of food shopping, and often advertise local restaurants/pubs. Trecco Bay near Porthcawl could be the prime candidate to explore as a Sustainable Food project.

On a separate tack, worth noting that several Council leisure facilities are managed by two social enterprise organisations - Awen and Halo - who are sympathetic to Sustainable Food ambitions. Awen contacted the Council asking for local suppliers in the course of this consultancy.

C: Hospitality

Sub-category	Total
C1 pubs	79
C2 restaurants	70
C3 cafes	102
C4 hotels	15
C5 takeaways	152
All entries in Hospitality	418



BRO Partnership, 2024. Basemapping & boundary data from ONS and OpenStreetMap.

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Producers and Processors (Category D)

Personal food production: It is well beyond the scope of this consultancy to assess how much food is grown (or foraged) on a personal basis, using home gardens or the countryside. However, allotments and foraging were mentioned in the consultancy brief as topics to consider.

We can comment on the availability of allotments in the Borough, and the main provision is listed in the database. Most allotments are controlled (if not necessarily managed) by Bridgend CBC and the various Town and Community Councils. This amounts to some 19 permanent sites of various sizes and tenures. This translates into some 430 individual plots, covering nearly 10 hectares.

The National Society of Allotment and Leisure Gardens recommends a minimum of plots per 1,000 households. With an overall population of some 145,000, amounting perhaps to around 45,000 households, that would suggest the County offers less than half the recommended number of allotment plots.

So, theoretically, the amount of food of fruit and veg grown personally on such sites could be doubled if the number of sites was doubled. This would depend on waiting lists and general demand for allotments. Tastes in fruit and veg have

changed considerably over time, but the standard allotment plot was originally decided upon because that amount of ground was deemed capable of supplying the fruit and veg needs of a family of four for the whole year. That is a very significant contribution to a household family budget.

Note that produce from an allotment is not typically allowed to be sold onto the open market, in any way, and certainly not in any significant or noticeable quantity. So it cannot be considered part of the commercial food supply chain. However, it may be possible to encourage allotment holders to donate any surpluses to their local food bank - sometimes known as “Abundance” projects.

Foraging is a very minor contribution in comparison to allotment produce. Foraging courses as such operate very intermittently (so no details have been included in the dbase). There are various issues of legality in terms foraging on private land (and sometimes also on public land). Furthermore, there is considerable debate on whether the current state of nature in Wales would sustain increased foraging. Accordingly, we would not consider foraging as anything more than a very minor contribution to home food supply (important as it may be to some individuals’ lifestyle).

Fishing is another possible, individual source of food in Bridgend. The rules on selling fish caught are similar to allotment produce: it’s basically illegal. No fish caught through recreational fishing may be sold.

However, subject to the “catch and release” regulations at any particular location, for any particular species, you certainly can eat what you catch. Bridgend County has a number of water bodies where fishing is permitted subject to licence, and this is also true of the seashore. For further reference if needed, a website link for Welsh Fishing Clubs has been included in the dbase, and one example of a fishing club.

Commercial fishing, including “in-shore”, requires Government registration, and any catch forms part of the UK fishing quotas agreed with other countries (mainly the EU). There is only one boat in Bridgend Country with such registration, a small vessel of under 10 metres, operating out of Porthcawl Harbour. This has been recorded in the database, but we could not establish in the time available what they do with their produce. Hopefully, they sell it locally (or could do).

Community Gardens: are another possible food source. However, mainly using the Social Farms & Gardens Cymru website, it appears we have only 6 such projects in the Bridgend area, with only one (BritGrowers) appearing to be produce a tradeable surplus, as such. Community gardens typically focus on the health & wellbeing benefits of the project, with the produce itself mainly being consumed

by the volunteers themselves. This represents a marginal contribution to personal food security, and for a relatively small number of people.

Worth noting also that, where the project operates on statutory allotment site, it would in any case be barred from entering the commercial food supply chain. As with allotments, it may be possible to encourage community gardens to donate any surpluses to their local food bank.

Farming: Approx. 50 farms have been identified as operating in Bridgend County area (although a handful of these may have sold their land). Few of the 50 farms have a social media presence, advertising direct sales to the public, and there are very few farm shops either. Only 4 farms altogether appear to specialise in fruit and vegetables.

Currently, this would make it impossible to create large-scale local supply chains in fruit & veg for retail outlets, the hospitality sector, and food processors. They may be able to provide some assistance to food banks. The Bridgend farming sector focusses heavily on livestock, and this is typical for most of Wales.

There are local meat processors, plus retail and hospitality opportunities. However, the bulk of meat trade is not localised. Livestock will frequently be taken to market for sale, and their end-use destination may not be known even by the farmer. A proportion does go to broadly-local abattoirs, but we have no information on quantity. In most cases, livestock sold by the farmer could end up anywhere in the UK, or beyond.

This is paralleled by the fact that meat processors (and abattoirs) may be importing large numbers of animals from elsewhere in the UK, particularly England. This could be a theme for Bridgend Council to explore in depth - how much meat produced in Bridgend could be re-directed into local slaughter/processing/sale/use?

Along with fruit & veg, Bridgend is also not well blessed with dairy farms (7). That may be reflected in the relative paucity of milk to sustain the manufacture of dairy products. For example: Carmarthenshire and Pembrokeshire produce a number of cheeses and other milk products. Bridgend has no cheesemaker that we could find.

There is little in the way of poultry or egg production.

Specialist Products: there are at least 20 suppliers of various specialist products, e.g., honey and other preserves, craft alcohol products. There may be more or these, and linking this sub-sector with independent retail and hospitality outlets could be worth exploring.

Food processors: there appears to be a cluster of food processing companies based on the Bridgend Industrial Estate. This may provide opportunities for some area-based work, depending on whether these companies can be matched to local suppliers or retailers. Waterton Industrial and Retail Park could be another area to consider. There is also a smaller cluster just outside the Borough at Pontyclun (RCT) on the Coedcae Lane Industrial Estate.

D: Producers & Processors:

Sub-Category	Total
D1 meat farms	15
D2 dairy farms	7
D3 poultry units	4
D4 horticulture	4
D5 fishing (inshore and inland)	3
D6 specialist suppliers, e.g. honey	20
D7 community food growing projects	6
D8 Council allotment sites	21
D9 Food processing factories	20
D10 Mixed or unspecified farming	24
All entries in Producers and Processors	124

Some Council (and Welsh Government) initiatives have led to the designation of particular industrial estates or other areas as “Food Parks” or “Food Zones”, e.g., Cross Hands Food Park in Carmarthenshire. Ynysyboeth Industrial Estate in Rhondda Cynon Taf in effect operates as such. This is an approach Bridgend Council could consider.

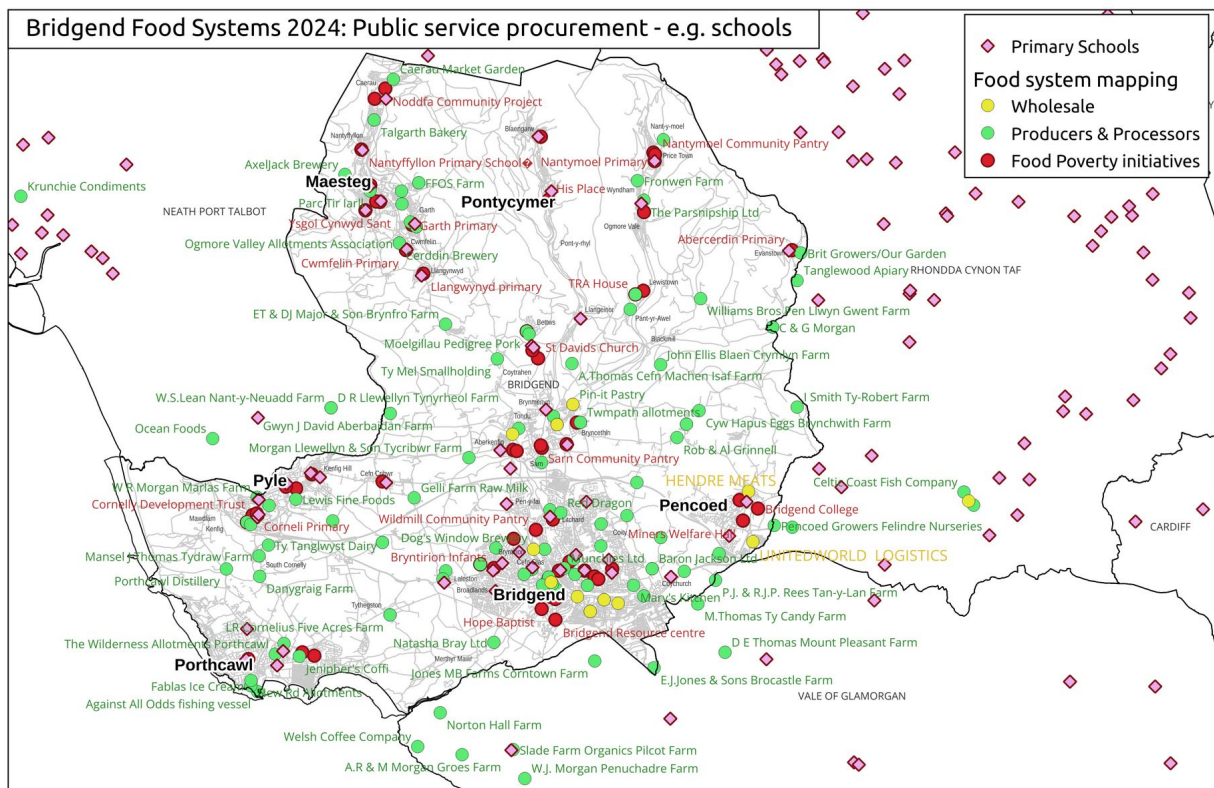
4. Thematic Findings

These findings sit alongside the information collected through the database and are mainly derived for the stakeholder interviews and the views expressed at the workshop held on the 9th April 2024.

Public Procurement

BCBC's procurement team are very committed to encouraging a more Sustainable Food system with the County. A large proportion of the procurement is undertaken on a regional basis, with Caerphilly CBC taking the lead for a number of Councils. Within this framework Bridgend CBC does have the capacity to undertake its own procurement.

The main focus of public procurement focusses on schools of which there are around 70 in the County and a small number of Care Homes operated by the Authority. Most of the contracts for school go to wholesalers and there are a small number of these who operate in the area. Some are keen to source local food and see this as part of their offer. Changes in the way procurement takes place could place further emphasis on sourcing local food as part of the way wholesalers operate. This would be a good demand led approach to stimulate increases in the extent and diversity of local food supply.



BRO Partnership, 2024. Basemapping & boundary data from ONS and OpenStreetMap.

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The procurement team have made attempts to understand the challenges that local suppliers face in putting forward tenders for contracts. One example here would be the bakery in Maesteg who do not bid for local authority contracts because the distribution costs are too high and the profit margins would not justify delivery to a network of schools spread across the County.

One of the challenges is having the resources to undertake regular contract monitoring. There was an example given that one contract for providing milk to schools was possibly not meeting the conditions set out in terms of the required delivery slot. The implication is that a local contractor missed out on a contract on the basis that another company promised to meet the conditions, but failed to do so - which undermines the competitive tender process.

The leisure facilities within the County are now run by two Trusts, Halo and Awen. Further dialogue is needed with these organisation to explore ways in which local food can be sourced for their centres.

Existing extent of sustainable food outlets

The compilation of the database was not detailed enough to look at which shops sold local or sustainable food and therefore through the stakeholder interviews we were only able to get a limited understanding of this aspect.

The general picture is that the number of food outlets - be they shops or hospitality businesses - who do sell local food is very limited. That said, we did come across some very good examples such as the Greedy Pig in Porthcawl who actively promote the fact that they source local produce as much as they can, including milk (Ty Tanglyst Dairy), coffee, tea, meat and beer/spirits.

Existing extent of sustainable food production

The extent and range of sustainable food production in the County is relatively small. There are no large fruit and veg growers, and there is little evidence that local farms are prioritising selling their produce locally.

To understand some of these issues in more depth, future research could look at different sectors, e.g. meat production, baked goods or horticulture.

There would also be merit perhaps in looking at fishing. Hardly any of the fish sold and consumed in the County can be directly traced to local fishing - in fact the County has only 1 registered fishing boat, based in Porthcawl.

Challenges and barriers to sourcing and selling local food

Both sellers and buyers face a number of challenges in sourcing locally produced food to be sold and consumed in the County.

For the producer, the key issue is keeping costs down so that they are competitive. This is very hard to do within the context of the cost of living crisis. For instance, as one butcher interviewed mentioned, *“it’s very hard to sell a local free range chicken, when a battery hen sold in Aldi or Lidl is a fraction of the price.”*

Producers are also faced with the difficulty of scale and consistency of production. One option here maybe to help set up cooperatives between producers so that they can offer a more even spread of supply throughout the year and a wider range of produce.

For buyers the above two issues are also very significant. But in addition there is the added issue of finding local suppliers who meet their needs. Filco Ltd, who have 9 stores in South Wales, and with 5 of these in Bridgend County, do try and promote local food whenever possible - and this is easier for some products than others. For instance, beer and other craft products include locality as part of their brand appeal, but for other products, say milk, it’s a lot harder to use the fact that it is produced locally as a major sales pitch.

Other barriers preventing businesses from using local suppliers include the need for hospitality business in particular to adhere to strict standards regarding food labelling in order to maintain a high food rating, and delivery times to fit in with opening hours.

Existing and Emerging Opportunities

Within the context of these challenges BRO’s research, although limited, did discover a small number, but highly enthusiastic businesses who wish to promote local produce. This was also evident at the stakeholder workshop which generated a lot of enthusiasm for the Sustainable Food approach.

To take this forward, more work is needed in either delving deeper into specific sectors and looking at ways to shorten food chains; or to take a spatial approach and perhaps set up two pilots or demonstration projects to look in detail at existing and potential links that could be established. These options are discussed further in Chapter 6.

Food Poverty Initiatives

There are approx. 65 initiatives advertised publicly in the Bridgend CBC area. This is testimony both to the scale of food poverty in the area, and also the energetic way in which community groups, voluntary sector organisations, some businesses in the food supply chain private sector, and the County Borough Council have all rallied to try to tackle the problem.

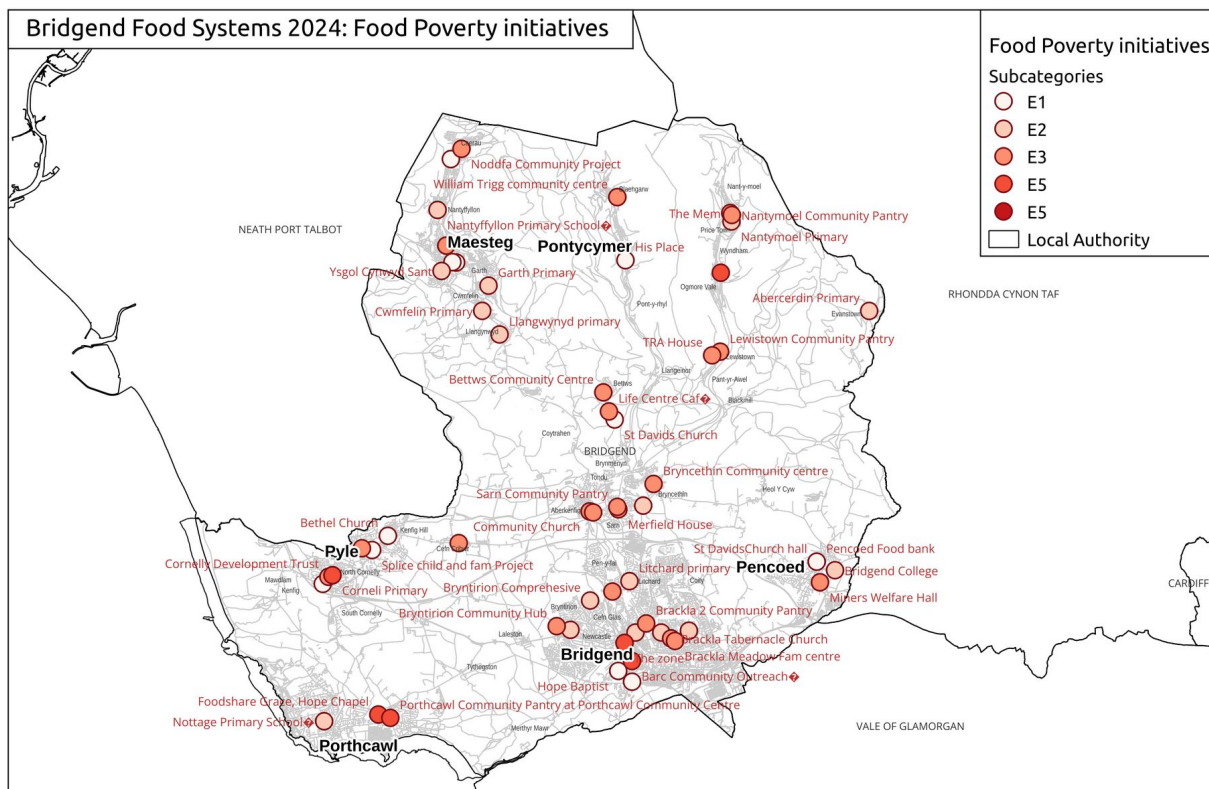
Almost all are affiliated to networks, principally the Trussell Trust, Baobab Bach, Big Bocs Bwyd (BBB) or FairShare Cymru. This means that any strategic/tactical gathering of information and ideas from Bridgend Food Poverty initiatives would be relatively simple, by engaging those 4 organisations in discussions, and seeking their help to circulate to their members. BAVO and the Council's Sustainable Food officer already support such a network - the Bridgend Food Network.

Some local initiatives also run a cafe, and there could be some limited benefit in linking those to potential local suppliers, expanding food sources beyond supermarkets.

Many of these groups are struggling to obtain enough surplus food to sustain their clients' needs. The availability of food from FareShare has fallen and some are having to supplement their supplies by purchasing additional food. Competition for surplus food is evident and there is also concern that some initiatives are receiving more surplus food than they need which is then going to waste rather than being redistribute to other projects that could use it. The extent of food poverty within the County must be a cause for concern though, and this must indicate an urgency to look at longer term solutions involving growing local food and linking this to educational programmes on food preparation, cooking and nutrition. Again, this is an approach that could be examined within the context of a small pilot looking at one or two specific localities.

E: Food Poverty

Sub-category	Total
E1 Food banks	17
E2 Big Bocs Bwyd units (school food banks)	17
E3 Community Food pantries - Baobab Bach network	25
E4 Community Food pantries - other	0
E5 Fair-share (depots, plus any members not included in any other category above)	7
All entries in Food Poverty Initiatives	66



BRO Partnership, 2024. Basemapping & boundary data from ONS and OpenStreetMap.

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Redevelopment Opportunities

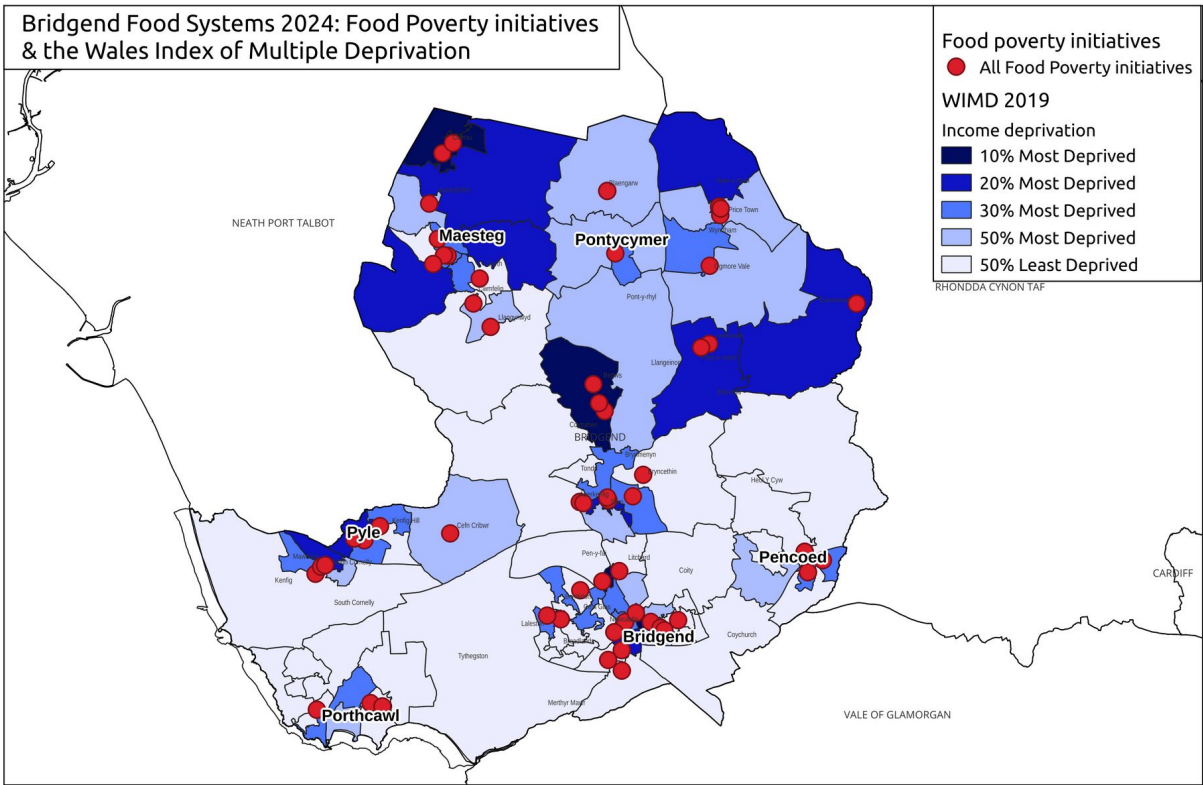
There are a number of emerging large scale redevelopment opportunities within the County, notably the seafront development at Porthcawl and further town centre improvements to Bridgend. These developments offer considerable opportunities to incorporate Sustainable Food and creative ways could be included within the way new buildings are constructed and subsequently used. Innovative approaches in other areas for instance has included using adapted containers as bases for local food sellers and this has created a different culture, alongside art and music.

Information and Mapping

As this research has demonstrated there is considerable value in gathering relevant information and storing this in a database which can then be used to undertake spatial analysis. For instance by looking at the location of food poverty initiatives it's possible to cross reference this to the Wales Index of Multiple Deprivation (WIMD) and specifically the Income map. This shows areas of low income which do not have any food poverty initiatives and so require additional resources through a more planned and strategic approach.

Information and maps are only useful though if they are relatively up to date, and therefore as the Sustainable Food Partnership network strengthens ways need to

be found to keep the database up to date and shared between partners organisations.



BRO Partnership, 2024. Boundary data from ONS and Wales index of Multiple Deprivation 2019. Other base mapping from OpenStreetMap.

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Campaigns and Awareness Raising

Several of the stakeholders interviewed mentioned the need to set up a concerted campaign to raise interest and awareness in local food. One suggestion was to encourage shops and cafes to have at least one local produce item for sale. The neighbouring County of the Vale of Glamorgan, which has been running a Sustainable Food partnership for over four years, has a number of posters in local shops to raise awareness.



5. Summary of Findings

The brief set out a number of questions and suggestions for the research. The table below summarises where either the database or the stakeholder interviews provide at least some insight.

Questions posed in brief	Database information	Stakeholder Interviews
What places currently sell food and drink and what percentage of those sell sustainable food and drink?	Local premises and operations contained BRO database, and in statutory Food Premises register database. But no info on sustainable food percentages in either.	From the limited number of interviews only a very small percentage sell locally sourced food and drink. This is partly down to cost and small profit margins. Interviews with Filco, The Station, The Greedy Pig and The Steak and Stamp
What places currently grow, produce, catch or forage for local food – such as local farms, growing projects, food processing businesses, fish farms and fishing fleets?	Comprehensively covered in the BRO database and in the Food Premises database	Ty Tanglwyst are an excellent example of a local producer of milk and they add considerably to the local economy. Interview Ty Tanglwyst
What local shops, markets, cafes, restaurants and pubs currently do in terms of food purchase and provision locally?	No info in either database	As above, only a very small percentage do this, but those that do use this as a way to promote their business and emphasis quality Interviews with The Greedy Pig, Sussed/ Porthcawl, The Station, Coychurch, The Steak and Stamp and The Little Penybont Arms, Pencoed
What institutions provide prepared food (schools, hospitals etc.)?	Comprehensive info in the statutory Food Premises database	The interviews only considered Bridgend CBC's procurement which covers schools and 4 Care Homes. Meals are prepared in house

		by catering teams. Interview Bridgend CBC Procurement Team
Who already sources their ingredients sustainably / would be willing to look at that side of their business/project/programme	No info in either database	Again, very small numbers are doing this and current pressures notably Covid and the Cost of Living Crisis have been challenging. Castell Howell as a wholesaler do promote local sourcing and therefore they can play a key role in taking the agenda forward. Interviews with Filco, Peter Wood and Sons butchers, The Station, Coychurch
Are there box schemes, farm shops?	Info in BRO Database	
What local organisations or individuals are involved in supporting, promoting or raising awareness about issues related to sustainable food?	Social Farms & Gardens, Big Barn, Bridgend County Allotment Association	BAVO
What difficulties are facing communities in terms of food security/obtaining food they need at a price they can afford?	No info in either database	There are several food poverty initiatives and as a legacy of Covid a food network has been established to improve coordination. Interviews with BAVO, Baobab Bach and Bridgend Procurement
Who is providing 'emergency' food help (food banks, warm hubs, pantries for example?)	Info in BRO database	As above Information from BAVO
What are the current method of procurement in the	No info in either database	Bridgend CBC operate through a regional

statutory sector?		cooperative system, but reserve the right to undertake their own procurement if required. Interview Bridgend Procurement
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6. Options and Recommendations

Based on all of the findings generated through this short study the following suggestions and options are put forward:

1. Develop and strengthen the network

The existing food network has to date concentrated on the coordination of food poverty issues, but there is now an opportunity to expand the remit and look more holistically across the whole food system within the County. A range of sub groups could be established to look at specific food chains e.g. meat or horticulture.

Expanding the group also provides an opportunity to involve producers, as well as Chambers of Trade and the two farming unions (NFU Cymru, FUW).

2. Keep information up to date

As the network expands and strengthens it will be important to establish mechanisms to keep the information generated through this research up to date and that it is used consistently across all aspects of the food system.

3. Consider two pilot demonstration areas

As well as thematic groups, consideration should also be given to establishing one or possibly two local pilot or demonstration areas. Suitable candidates could be Maesteg or Porthcawl, which would provide contrasting settings. These local pilots would look at practical ways to shorten food supply chains and to maximise the local economic benefits.

4. Continue to refine procurement

Public procurement systems offer an excellent opportunity to encourage further establishment of local supply chains. Whether a regional approach is taken, or when the procurement is led by BCBC itself, creative procurement practices could open up considerable opportunities for local suppliers. Taking this forward, perhaps through a Foundational Economy approach, it will be important to establish a baseline of how much local produce is already being supplied locally, directly through contracts or indirectly through subcontracting. In addition, monitoring compliance with contract conditions (such as adherence to stated delivery times) would bring a better appreciation of whether promises made by suppliers are met. By understanding the current situation and the barriers, further refinements to the Council's procurement approach could then bring about significant changes.

5. Set up awareness campaign

One aspect that should be considered is establishing an awareness campaign throughout the County, but with a focus on the larger settlements. Working with Chambers of Trade here will be very important. The campaign could focus both on

getting the public to be aware of the range of local produce and to actively seek these items out; and for shops and hospitality businesses to promote that they are making a point of selling local items as part of their offer.

6. Look to longer term solutions to food poverty

Further networking and coordination in reducing the impact of food poverty in the County will bring about several benefits. As noted in the Stakeholder Workshop, consideration should be given to establishing a central base for storage, processing and as a focal point. In the longer term the collective approach to reducing food poverty needs to include more community and personal food growing, but to be effective this must sit alongside educational programmes covering cooking and nutrition. Transport and distribution costs are a factor in meeting the needs of some sectors, notably the elderly - and again coordinated action is the only effective way to tackle these issues.

7. Use redevelopment opportunities to promote local food

BCBC should consider how to incorporate Sustainable Food principles and practices into any major redevelopment and economic regeneration projects. The emerging plans for the Seafront at Porthcawl, for instance, offer significant opportunities for providing sustainable food outlets and promoting local products. It is easier to build such opportunities into emerging development projects, as opposed to retrofitting them after the buildings have been constructed.

8. Look at wider policy context

The Sustainable Food Partnership's work in Bridgend will be taking place within a wider context, notably the Welsh Government's emerging Sustainable Farming Scheme and Community Food Strategy. There are also legislative changes underway for public and social procurement which will have a bearing.

9. Look at best practice elsewhere

And finally, as BCBC is at the start of its Sustainable Food journey, there will be considerable benefit in looking at the experiences elsewhere and assessing whether any of these could be replicated here.

Annexes

Annex 1: Database Methodology Report

Introduction and background

The database included 5 main headings under which data needed to be collected. This was to be expressed in a simple database (Excel), from which visual maps or brief summary reports can be extracted and presented.

Inevitably, the work done now will only be a snap-shot of the situation, as at Spring 2024. It will not be a fully comprehensive picture, in that it relies solely upon information which is in the public domain. And in a period when the hospitality and retail sectors are under particular pressure, with many closures, changes of focus and ownership underway, the information in those sections will also change, quite rapidly.

However, by providing a simple Excel-type database, the possibility will be there for BCBC and partners to continue to update the information, and develop its functionality. In the short term, the aim was to see if the data suggests projects/initiatives the Council could prioritise, particularly in terms of linking sectors, and considering particular parts of the Borough.

It was agreed to complete the database using the simplest information. Essentially, this would be name of entity, postcode, and Category and Sub-Category describing their role. Sometimes the nearest settlement (“location”), e.g., Cefn Cribwr has been added where this is readily available from public data. This could help to focus on a particular location. However, much of the data available identifies postcode, but doesn’t provide much detail of village or hamlet.

Wherever possible, we have “triangulated” the data-collection. Typically, one main source has been identified, providing the bulk of entries. Two other sources have then been used to verify and expand entries. This is still no guarantee of complete accuracy, or coverage. But it does mean the entries are very representative of the food chain in Bridgend.

There is a “comments” section available for each data entry - this can be used to link possible initiatives/networks to be prioritised. It might also be able to deal with the issue of where any entity recorded covers several Categories or Sub-Categories. Sometimes it has been used to “flag up” uncommon products or services.

Compiling the database

Through discussion with BCBC staff, the Categories and Sub-Categories agreed were as follows:

A: Wholesalers

A1 Based in Bridgend

A2 Based elsewhere (but supplying Bridgend in quantity)

The sources for most of the data are Dun & Bradstreet + Yell.

B: Retail:

B1 larger supermarkets

B2 farm shops

B3 farmers' markets

B4 wet fish shops

B5 corner shops/small convenience stores

B6 zero waste stores

B7 butchers

B8 fruit and veg

B9 bakers

Corner shops have been included as many settlements in Bridgend depend upon them - which may help to understand access (or lack of) to healthy food in some areas. Zero Waste shops have also been included - there are hardly any, but they are typically "on board" with any sustainable food retail. The handful of Farm shops and farmers markets have been included for similar reasons - apart from actually selling food, they are doing so in a way which is more localised in terms of "field to fork."

Bakers are quite well-represented (17), but 7 of those in fact are Greggs shops, which would likely impinge on constructing local produce arrangements.

The sources for most of the data is Dun & Bradstreet + Yell, with some information coming from Wales On-Line directories and "MisterWhat". This has been checked against the Food Premises register described below. It should be noted that, whilst much of the groceries home delivery market is dominated by the larger supermarkets, there are others in the marketplace, who may be quite active in Bridgend, e.g., Oakhouse Foods is a specialist supplier to older people. Apart from establishing that Oakhouse have a depot in Swansea, it has proved difficult to pin down where some of these other organisations operate from, e.g., Beelivery is a more general supplier, but not local even in a broad sense.

C: Hospitality:

C1 pubs

C2 restaurants

C3 cafes

C4 hotels

C5 takeaways

The Hospitality sector proved the most difficult to compile, due mainly to the sheer volume. The most complete picture of this is held by the Council through its Food Hygiene regulatory function. In practice, maintaining the register is dealt with through a Shared Regulatory Service, and the lead is with the Vale of Glamorgan Council. All information is ultimately held on a UK register by the Food Standards Agency. That ‘complete’ database was showing some 1,370 registrations for the Bridgend Council area.

The problem for our purposes is that registrations cover everybody from somebody selling a few cakes now and then, to hospital and local authority kitchens, and also food processing/manufacturing establishments. With all stops in between, absolutely anyone who needs a Food Premises registration, for any purpose - but not necessarily producers.

Following dialogue with Vale of Glamorgan Council staff, they did provide (very quickly) a version with “Sub-Category” comments. Although very helpful, this was again more like the total list of food premises, and therefore not specific to this task. It would make no sense simply to “cut and paste” data that the Council already holds in database form, and then send exactly the same information back to the Council.

The individual home bakery and confectionary providers have mainly been removed for this report (except where they advertise publicly), as they are not key to the food chain; and also because their product frequently has health issues (obesity, dental). Schools have also been removed as being already within the scope of Council sustainable food discussions. The same applies to Council residential and care centres (which are mainly in the private sector ones). Hospitals and Parc Prison were also not included.

There are also many social and sports clubs who do provide meals, but this is not their main function by any means, and provision may be quite occasional. The same is true of various community groups and churches who provide food for events occasionally, and therefore must register with Environmental Health.

Also excluded for this purpose of this report were the mobile caterers - chips vans, etc, who may not be in static locations, or their registration may not refer to where they actually operate, it's just their home address. There are over 50 on the Council register, so this could be an avenue/project to pursue at a later date.

The Food Premises register did provide a very considerable and very useful amount of data, and is the authoritative check on data derived using other methods, filling in a number of knowledge gaps where information is not very public elsewhere.

It does operate with Sub-Categories and descriptions which broadly match many of the ones we are also deploying. It seems possible that the BCBC Sustainable Food officer could establish regular use of that Food Premises register with their colleagues in Environmental Health (and with Vale of Glamorgan Council) - and there may be ways of manipulating the relevant data so that it is useful for purposes not explored, or not explored fully, in this consultancy. That would leave the task of updating the database provided by BRO only in Sub-Categories which are not on the Premises register. And the BRO database could then be used more to support particular sector or geographic projects.

Due to sheer volume of possible entries in the “**C - Hospitality**” Category, it was also agreed to use more of a ‘place-based’ approach. So the list of pubs, restaurants, cafes, hotels and takeaways comprises mainly those in, or close to, the main settlements in Bridgend County, e.g., Bridgend Town, Pencoed, Porthcawl, Sarn, Maesteg and Pyle/North Cornelly.

In practice, those settlements involve some 120,000 residents of a Bridgend County total population of some 145,000 - around 80%. And it has produced over 400 entities with whom the Council may be able to collaborate.

The takeaway market over the years has shifted towards delivery (Covid accelerated this), and the use of on-line apps and delivery companies. So, much of the data in the Takeaway Sub-category has been checked against Ubereats, JustEats and Deliveroo, with other trade directories like Wales On-line and Yell being used as a final check.

It's worth noting that some of the food delivered comes from multi-purpose kitchens these days, sometimes sited on industrial estates. Where it has been possible to identify that from the Food Hygiene register, that has been noted. But we suspect there are more operations like that which we weren't able to identify.

Overall, the distinction between cafes, restaurants and takeaways has become blurred over the years, and particularly since Covid, when a number of premises had to start providing takeaways in order to survive. Some pubs even do takeaways these days.

D: Producers & Processors:

D1 meat farms

D2 dairy farms

D3 poultry units

D4 horticulture

D5 fishing (inshore and inland)

D6 specialist suppliers, e.g., honey.

D7 community food growing projects

D8 Council allotment sites

D9 Food processing factories

D10 Mixed farming or unspecified

This Category is mainly private sector, but also has a Sub-Category specifically for community food growing projects (who are typically pioneers of the “sustainable food agenda”). It includes some 50 Bridgend farms (although a handful may have sold off their land).

Powys Council, has a project to engage its tenant farmers with sustainable food production. However, sadly, BCBC appears to have no tenanted farms, so this is not an option going forward.

Exploring with farmers exactly where their produce goes could be a useful collaborative project.

Also included are allotment sites, to reflect that some food in Bridgend is produced personally and individually - “grow your own.”

Good starting points for this information were:

- The Big Barn website. Big Barn promotes local food buying, seasonal food, farm shops, sustainable food organic food etc, and lists suppliers in such categories. The Open Food Network was also used to cross-reference.
- NFU and FUW are possible sources for detailed farm data, a “next-level” examination of exactly what they produce, and how they market. Some may be keen to support the Council’s initiative. However, the current database entries are based on public sources, e.g., Yell and individual farm’s self-promotion. The difficulty with the public ‘trade directory’ sources is they do not generally identify the type of product in each farm; and some farms engage in mixed farming, e.g., some meat, some dairy, some arable. In a handful of cases, farms have a presence on social media, which clarifies their products and

services. A Sub-Category of D10 - mixed farming/unspecified was introduced to reflect that knowledge gap.

- Social Farms & Gardens have a list of community food-growing projects which has been incorporated. BAVO data was used as a final check .
- The role of “grow your own” has also been explored. Council allotments are the most obvious enabler of this, so information came from various Bridgend Council public sources, e.g., Town or Community Council websites.
- Other sources that proved useful, for private sector entities, were Food Innovation Wales, Dun & Bradstreet, Wales Online directories, MisterWhat and Yell. Also, Transparent Farms UK, who maintain a database of livestock and poultry farms for the purpose of opposing their existence. Farming Connect does not have enough public information to add much.

E: Food Poverty Initiatives:

E1 Food banks

E2 Big Bocs Bwyd units (school food banks)

E3 Community Food pantries - Baobab Bach network

E4 Community Food pantries - other

E5 Fair-share (depots, plus any members not included in any other category above)

Bridgend benefits from the Baobab Bach network of community pantries. Fairshare publicises a list of food banks, comprising its Community Food Members. Similar lists are available from the Trussell Trust and IFAN (the Independent Food Aid Network). Big Bocs Bwyd (BBB) is a schools network with its own website. BAVO supports a network of food initiatives and projects

Originally, there was also a Category F for Public Procurement contacts in the Council, Fire, Police and NHS. It became apparent that such a list doesn't fit with the rest of the Database. Data entry would be different, GPRD issues would arise , and the Council's Procurement Officer is in touch with other public sector buyers, they already have the necessary contact details. So that Category was removed, and the role of public procurement would be covered in the Main Report.

Other details on database compilation

- **Data entries** don't include individual contact names, phone numbers, email addresses etc. Those raise unnecessary issues of confidentiality. Also, those details change quite often, and this database is being produced as a “snap-shot in time”. Opening times/business hours are also not stated, as again, these change and the task of compiling and verifying them would be hugely time-consuming.

- **Out of Borough/Buffer zones:** some key organisations, e.g. wholesalers like Castell Howell, aren't based in the Borough. And some food growing projects/farms may be just across the border, but in fact be part of the Bridgend food supply chain. So, some such entities have been included, to briefly illustrate that Bridgend food chain, inevitably, crosses local authority boundaries. The postcode column in the dbase will usually pick this up, but it can also be noted in the "comments" and/or "location" column. This would also reflect the fact that people think of "local" in different ways - it commonly includes places in a next-door local authority, and also much wider sub-regions.

Annex 2 Bridgend Sustainable Food Database

Excel format, so to be provided as a separate document

Annex 3 Environmental Health Food Premises Database

Excel format, so to be provided as a separate document

Annex 4 Indicative Maps

All maps available as a separate high-resolution images

Annex 5: List of Stakeholders Interviewed

- Ty Tanglyst Dairy
- Filco Ltd
- The Greedy Pig, Porthcawl
- BCBC Procurement Team
- Peter Woods and Sons Butchers, Bridgend
- Sussed/Sustainable Wales, Porthcawl
- BAVO
- The Station, Coychurch
- The Steak and Stamp, Pencoed
- The Little Penybont Arms, Pencoed
- Baobab Bach

Annex 6: Stakeholder Workshop Notes

Breakout Group 1: Community Food Resilience:

What can be done in the short and longer term to ensure that there is a sustained reduction in food poverty within Bridgend County and that families have improved access to more nutritious local food?

Challenges

- The demand for food is high and there is less surplus food available, and therefore more competition for it given the number of food poverty projects in Bridgend.
- Growing food is an alternative, but it is a slow burn and can be unreliable.
- Balancing supply and demand can be difficult, particularly making sure any other projects benefit from any surplus you may have so food doesn't go to waste - redistribution is therefore very important.
- The surplus food being supplied by supermarkets is not always good quality - there was a feeling that sometimes they are trying to cut their waste bill by off-loading questionable food. Sometimes poor quality food needs to be rejected.
- Users sometimes are unfamiliar with certain products especially vegetables and they need to be taught how to use them e.g. aubergines / avocado etc.
- Not everyone has the space or facilities to batch cook, store or freeze food.
- Not all groups have the facilities to cook for community event and therefore they would need to prep food elsewhere and bring it in to heat-up locally.

- Delivery is vital for some people, especially the elderly, but access to transport and a suitable vehicles for some groups is not possible.
- The lack of sharing resources is a significant issue.

Opportunities

- Supermarkets like giving surplus food to charity as it helps to reduce their costs, but they need to be involved in the food poverty discussions since this would help coordination.
- A food sharing network is needed and this could be an effective way to overcome some of the challenges.
- A central storage site for all projects to share could help to cut costs. This could also provide a central contact point for all of the groups and make it easier for people to access help and services. This could be a role for BAVO as coordinators and distributors. Such a centre would also ensure all initiatives are meeting the same food hygiene levels.
- Food processing could be considered if a central hub was available utilising all available skills and training and central facilities for cooking and freezing.
- Big Bocs Bwyd (BBB) is about the education of children and food, but more could be achieved if other food poverty initiatives provided education for their users as they don't necessarily know what or how to cook with the items available.
- Surplus food could be used in community lunches and community gatherings.
- Fareshare UK are undertaking a trial of using surplus food working with a canning processor, but this does increase costs.
- Fareshare Cymru also have a small trial using surplus food to create ready meals each containing 2 of your 5 a day, low in fat and sugar and costing £1 per meal. These are available in single servings and in 10 or 20 size servings for community lunches although uptake of these larger portions is lower.

Breakout Group 2: Procurement

Buying Local Food: What are the challenges and opportunities in encouraging businesses and people to buy more locally produced food?

Challenges

- The cost of sustainable local food supplies is usually higher, e. g. organics
- The availability of supply is also an issue, e.g. Castle Howel include some local food and it's possible to get eggs from Ogmore - not so easy to find local flour.
- There is also an issue in terms of the reliability of supply.
- Sundry contract clauses - do they support or hamper local supply?
- Monitoring of clauses - are local supply and service clauses monitored?
- Suppliers can have problems with Environmental Health or Trading standards. For example: if you buy eggs in trays at the farm gate, you cannot then pack them into boxes of half a dozen and resell them in a community pantry. The customer has to fill their own box, due to there being separate regulations for egg packing.
- People are used to certain kinds of food (particularly heavily processed items), and are maybe resistant to change. They may not have the cooking skills to use different foods.
- Hospitals and schools may have particularly tightly-designed menus - diet and portion control. Hospital and school diets also include unseasonable foods. This may not appeal to local suppliers, they may not have capacity to supply to meet those requirements.
- A key element in a Sustainable Food supply could be the perception the healthy, local food is not particularly popular - there could be resistance from buyers and purchasers, which comprises demand for suppliers

Opportunities

"Procurement isn't a barrier - it's an enabler, an opportunity"

- There are changing perceptions of healthy diets, which needs to be accompanied by more effort around teaching how to use more local, more nutritious foods; and cooking in general.
- The Council perhaps could do more to contact potential suppliers, explaining contract procedures, and generally seeking out more local suppliers, e.g., Caerphilly Council had staff from across disciplines working to help a local dairy become capable of bidding for milk contracts. This was successful, and could, perhaps, be replicated in Bridgend where there are a few dairy farms.

- Could the Council and/or the Welsh Government help with premises, e.g., some kind of collective use of a properly equipped vegetable preparation unit to be used by several small producers?
- Could there be Food Hubs developed for production and retail?
- More co-operation with Environmental Health and Trading Standards would be useful, e. g., Food Premises register, but also interpretation of regulations. Bringing EHOs/Trading Standards into this discussion about how we improve food resilience/local supply, having them part of developing the idea rather than reacting to it, could be very beneficial.
- Everyone thought the idea of mapping the food supply chain in Bridgend (data-base/visual illustrations) is a very useful way of starting to link-up ideas. The database could be used in several ways, for example, helping purchasers to find local suppliers. Could also be used to focus on particular elements of the food chain, seeing if direct links could be made or developed. Identify where gaps exist, see if the Council can help suppliers to fill them.
- Baobab Bach's network already finds local supplies, and has started to link growing projects (7, so far) connected to their Community Pantries.

Group 3: Producing Local Food

What are the challenges and opportunities in encouraging more businesses to produce more and a greater variety of local food?

Challenges

- Land ownership: It's often difficult to know who owns particular parcels of land. Related to this is the suitability of the land, the quality of the soil and its accessibility.
- Access to housing: there needs to be suitable housing close to growing areas and this can be very tricky to find.
- Getting planning permissions are another challenge.
- Skills is an issue and the awareness of possible jobs in the sector. This relates to the work done on the National Nature Service.
- For people to want to go into the sector there has to be a demand for the produce grown, so it's a chicken and egg situation (no pun intended!)
- There has been a sharp increase in associated costs e.g. compost and distribution.
- One of the biggest challenges, and this relates to all aspects is the short term project funding that's available for such initiatives. This makes it difficult to bring about transformational change.

Opportunities

- There are technological advances which are increasing efficiency and enhancing profit margins and this is creating new advantages.
- Over the last few years there has been an upsurge in regenerative farming and this relates to the forthcoming Sustainable Farming Scheme. Growing and conservation are now more aligned.
- Within Local Authorities and with the drive of the WFGA there is scope to increase the integration between departments and sectors.
- Education, links to the curriculum and awareness raising is very important and offers a lot of opportunities.
- There are other important initiatives such as Quick Start now operating in Bridgend.
- Relating to this, Colleges are now able to offer wider courses, developing life skills and providing mentoring. All of this can help young people to get into the sector. Career Wales can also play a role here. The Green Skills agenda is increasing and so it should be possible to take advantage of this. BAVO and the WCVA have an important role to play here.
- There could be opportunities to work with prison offenders as well, helping those that are about to be released.
- It may be possible to incentivise change - and a good example of this can be seen in Treorchy.

- The RSLs are an important player and Valleys to Coast are now adopting a 30 year plan through their Growth For Good initiative to make the best use of their greenspaces, including helping the residents to grow food.
- Shared farming is an exciting idea whereby there is collaboration between older farmers mentoring a younger generation. This occurs in New Zealand and is highly effective.
- There is an opportunity to work with the farming unions and the WG, looking at making maps of who farms individual parcels of land more available. This would help identify which areas could be used for different forms of agriculture notably growing crops.
- Cardiff Capital Region are looking at different entrepreneurial models and are also looking to invest in sustainable food initiatives.
- There is scope for more sharing of best practice and networking.

Summary of Event

- Good to bring local knowledge together.
- Event provided a good networking opportunity.
- Producers and other stakeholders such as supermarkets not present and need to be involved.
- There are opportunities to share information.
- There are benefits to working together and not in competition with each other.
- Should consider developing shared governance and consistent standards, and working with Environmental Health.
- Need to be realistic in what can be achieved within the current 1 year funding of the Sustainable Food Officer, but more funding might be available.
- Need to work out how to overcome the scrabble for surplus food and competition between Food Poverty groups.
- Need to look at producers in more detail - what do they produce and when?
- Sharing facilities and resources would allow groups to help each other.
- Develop long term plans alongside dealing with the day to day reality.