

# EXPLORING OPPORTUNITIES FOR FARMERS IN WALES TO PRODUCE FOODS FOR FUTURE MARKETS

## What would it mean for farmers in Wales to produce more plant foods?

### Executive Summary

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**Changing diets and pressure to reduce impacts from livestock present challenges for many Welsh farmers. But these changes also present opportunities. What if a Welsh farmer wanted to produce more plants? This project identified how farmers might be enabled to produce plant crops, and the challenges they face.**

### CONTEXT

Diets focused on plant based foods (fruits, nuts, vegetables, cereals, legumes) are increasingly popular in the UK, and have been promoted as beneficial for planetary and human health. This trend has prompted polarised debates, and strong reactions from farming communities reliant on meat production. This research sought to move beyond conflict and regarding change as threat to uncover opportunities. Welsh agriculture is dominated by livestock, presenting a valuable context to consider whether these farmers might feed demand for plant crops.

### THE RESEARCH

Mixed methods research (survey, interviews, workshop) explored farmers' concerns and interests regarding opportunities to diversify production to provide more UK-grown plant foods. It explored experiences of farmers who have already moved into plant crops, and potential for others to follow similar pathways. Researchers sought to facilitate constructive dialogue with farmers and stakeholders from across Wales. In total 31 farmers and 8 Stakeholders participated in one or more data collection activity. The results give insights to how those who produce food perceive dietary trends.



## FARMERS' ATTITUDES TO PLANT BASED DIETS

*"My whole business depends on people eating meat."*

(Farmer)

*"We have capacity to grow crops."*

(Farmer)

Trends in consumer diets are not a prime concern for farmers; changing subsidy schemes and trade arrangements receive greater priority. Farmers are almost equally split between those who are optimistic and pessimistic about the impacts of reduced meat consumption. Few are likely to respond in the near future due to uncertainty about the trend and confidence that demand for quality meat will continue.

## DIVERSIFYING INTO PLANT CROPS

*"You can learn from the past and look to the future, then we can have a lot more varied agriculture here in Wales."*

(Stakeholder)

A minority of farmers see potential to introduce horticulture to their business. Those who do are unlikely to be farming within less favoured areas. However, those who already produce plant crops and some stakeholders see a need for more farmers to diversify their production.

There is no clear view on the extent to which Welsh farmers should move away from livestock, but many are confident of the potential to produce more than meat. Mixed farming received considerable support as a flexible model with social, economic and environmental benefits. Introducing plant crops to a farm needs to come together with altering supply chains and reaching new markets.

## ACCESSIBLE OPPORTUNITIES – THE LOW HANGING CHERRIES

The research highlighted production which could be integrated to livestock farms, harnessing farmers' existing skills and equipment. Fields of fodder crops might become fields of vegetables or cereals; fruit and nut trees might be incorporated into grazing land.

Business models which offer easier access include growing to sell to specialist processors such as winemakers. Collaborative models of various scales were seen as lower risk, with the example of Puffin Produce highlighted as offering a reliable supply chain and supportive context for new growers. Letting land to a grower or producing within cooperatives were highlighted as opportunities for livestock farmers to bring in new skills, and share the burden of diversifying.

It will not be possible for all farms to produce plants. Participants highlighted the need for a patchwork approach with farm by farm selection of opportunities to suit the context and people. Diversifying production should not be seen as a way out of failure for failing farms as it takes a great deal of work, and is most likely to succeed when incorporated into a successful business.

## LEARNING FROM SUCCESSFUL PLANT PRODUCERS

The research sought to learn from experiences of Welsh farms which have recently established plant production, and to see whether these could inspire other farmers to pursue similar opportunities:

- Pick Your Own soft fruit on mixed farms
- Fruit and vegetables grown for on-farm retail
- Dairy farm transformed into a horticultural cooperative
- Indoor hydroponic salad growing in redundant farm buildings

Together these case studies illustrate some ways Welsh farmers have introduced plant crop production to their businesses, often in combination with livestock. They demonstrate successful business models, whilst highlighting some issues which might deter others from pursuing similar opportunities. Feedback from research participants indicates that each has some appeal, but should only be pursued if suited to the particular location, business, and person.

## BARRIERS TO TRANSFORMATION

***“I feel quite passionately that there’s a need to do it - but we have to be realistic about how easy it is to do as well.”***

*(Stakeholder)*

Multiple challenges were noted as slowing or preventing farmers’ transition into plant production. The strongest theme was economic considerations: the need for financial support, concerns about the difficulty of making profit, expensive start-up costs, and needing assured income generation. Another prominent theme was attitudes and perceptions within farming communities which can be summarised as conservatism. Resistance to change and innovation is compounded by negative perceptions of horticulture, and the conventional belief that farmers in Wales don’t grow crops. Those who are open to doing so face practical constraints: lack of skills and equipment, labour shortages and difficult soil or climatic conditions.

## PATHWAYS TO TRANSFORMATION

At present it is easier for farmers to carry on doing what they have always done. Enabling change is not just about offering practical support, but understanding and working with farmers as people with certain attitudes and practices, both individually and as a community with some shared norms. Multiple solutions are required to address the complex factors which influence farmers’ behaviour, and encompass diverse attitudes to change.

By examining the experiences of those who have introduced plant production to their farm, and how others perceived this step it is possible to identify what circumstances need to come together to enable this transition.

## WHAT WILL ENABLE MORE WELSH FARMERS TO PRODUCE PLANT CROPS?

Conditions enabling diversification	Support Required	Considerations
<b>Farmer open to change.</b>	Peer networks promote opportunities and successes.  Organisations communicate that change is required soon.	Promote change as return to historic patterns of mixed farming.  Need to counter negative perceptions of horticulture.
<b>Understanding of the opportunities and how to implement them.</b>	Advice, data and case studies from trusted organisations.  Engagement with new entrants and innovative farmers.	Communication needs to penetrate farmers’ busy lives and information overload.  Organisations need to collaborate across the traditional-newcomer divide.
<b>Risks to the business are understood and mitigated.</b>	Whole farm business planning.  Producer organisations / cooperatives guarantee a market.	Surety of supply chain is key.  Plan needs to align with farmer’s values and priorities.
<b>Farmer confident and skilled to work in different ways.</b>	Collaboration with people skilled in other operations.  Financial support to attend training.	May not suit everyone.
<b>Financial resources to invest in new infrastructure, and to ride out payback period.</b>	Capital grants.  Revenue funding for establishment and running of cooperatives / food hubs.	Need flexibility in funding mechanisms – scale and type of farm.

## CONCLUSION

There is potential for farmers in Wales to produce more plant foods, but this is not an option for all farms, and will not be easy to achieve. There are some who are optimistic about the potential to feed people differently as diets change, but they are presently outnumbered by those who are more pessimistic or expect to carry on feeding meat consumption. The discussions enabled during this project are cause for optimism that these issues can be explored in a constructive, forward looking manner. By considering the experiences of innovative farmers who have moved beyond meat, and reflecting on how others may follow similar paths, it was possible to identify what can enable this transition.

This research is limited by difficulty engaging significant numbers of 'conventional' livestock farmers. There is a need to engage a broad range of farmers in research on this topic, particularly as there is little data on producer perspectives on plant based diets. Some participants were skeptical that consumer diets will change significantly, suggesting a need to communicate reliable data on the trends.



## RECOMMENDATIONS

The research provides a basis for actions recommended to help progress understanding of the potential for more Welsh farmers to produce plant crops, and to shape conditions conducive to this transition. Some recommended measures are currently provided through time- or place-bound initiatives. The degree of risk farmers face in responding to change warrants greater certainty and longevity in this type of support.

- **Government and stakeholders to enter honest, productive conversation about the prospects for livestock producers.**
- **Government and stakeholders to effectively communicate robust and credible projections of dietary trends, including consumption of animal products.**
- **Agree a national strategy towards a farming industry centred on 'more than meat': mixed farming and plant crops in the right places.**
- **Trusted voices in the farming community to promote examples of successful plant producers around Wales.**
- **Cooperation between organisations (advisors, membership bodies, networks) to embed promotion of horticulture and other plant crop production in mainstream advice and support systems.**
- **Support for forward looking farm planning which considers diverse produce and business models.**
- **Invest in supply chain development and support, including funding to facilitate cooperative structures.**
- **Support farmers to make land available to new entrants and others interested in growing plant crops.**
- **Offer financial assistance (loans, grants) for establishing new crops, and support applicants through the process.**