



Llywodraeth Cymru
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High-level review of Welsh Government food sector schemes: summary

This report is a high-level review of support operations funded by the Rural Development Programme for Wales's food and drink sector.

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Introduction

Wavehill was commissioned by the Welsh Government to conduct a high-level review of support operations funded by the Rural Development Programme (RDP) 2014 to 2020 for Wales's food and drink sector. This review is part of a broader evaluation effort, including specific assessments of the Food Business Investment Scheme (FBIS), a flagship scheme under the RDP, and the Rural Business Investment Scheme: Food (RBISF). As RDP-funded interventions are set to conclude by June 2023, the Welsh Government aims to use this review to shape future post-Brexit support for the sector.

The primary objectives of this review are:

- To provide a comprehensive assessment of the economic and environmental impacts of the RDP-funded food sector schemes.
- To evaluate the alignment of these schemes with broader Welsh Government and EU strategic policy objectives.
- To offer recommendations and identify lessons learned, particularly around provision gaps, the food business development pathway, and potential improvements in future support delivery.

Initially, the review focused on four key schemes: Helix, Cywain, Food Skills Cymru (FSC), and FBIS. However, Wavehill expanded the review to include other RDP-funded food and drink provisions where evaluative data was accessible.

Methodology

The methodology for this high-level review aligned with the requirements outlined in the original specification, which called for a synthesis of monitoring

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data and secondary evaluation evidence for five flagship schemes, alongside qualitative interviews with delivery leads. Wavehill expanded on this approach by incorporating additional evaluation materials and interviewing leads from other relevant schemes.

The evaluation was conducted in two stages:

- In the initial stage (January to June 2022), Wavehill conducted scoping interviews with Welsh Government officials and industry representatives, reviewed relevant literature, and identified 19 food and drink sector schemes to include in the review. These schemes were selected based on their direct support to food and drink businesses or their specific sector focus. Following this selection, interviews were held with the delivery leads of each scheme, along with Welsh Government policy and delivery personnel. These discussions provided insights into the support packages' alignment, economic and environmental impacts, and opportunities for improved integration in future delivery.
- The second stage involved compiling evaluation data for 14 of the 19 schemes, including direct Wavehill evaluations of four of the five flagship schemes, with data gathered from delivery leads and evaluation materials for the fifth. A meta-review assessed each scheme on several variables, including delivery performance, alignment with sector strategy, impacts, and lessons for future delivery.

Limitations

Due to challenges in accessing evaluation materials for some projects, this review provides a partial view of the total impacts of the schemes. Additionally, evaluations varied in rigor, from using self-reported data to employing comparison groups, and levels of economic and environmental impact analysis were inconsistent. Finally, overlapping support for some businesses across multiple schemes may have affected the accuracy of aggregated impact data.

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Main findings

Sector overview and policy context

The food and drink sector is vital to Wales's economy, with a larger emphasis on very small businesses compared to the UK overall. Significant policy focus has aimed at fostering economic growth, sustainability, and promoting Wales as a Food Nation. Efforts have been directed towards supporting 'high growth potential' businesses and facilitating the transition from micro to small and medium-sized enterprises (SMEs). However, challenges such as low margins, shelf-life issues, and skill gaps hinder this transition. Additionally, there is a perception of limited career pathways in the sector. While Welsh Government initiatives aim to support smaller businesses, the operational focus has been insufficiently aligned with creating sustainable growth pathways. Research suggests targeting larger businesses could yield better economic returns, as smaller firms tend to leak benefits outside Wales.

Support package breadth and complementarity

Wales offers a robust support landscape for the food and drink sector, with various flagship schemes promoting training, skills, and networking. These schemes align well with Welsh Government objectives, often supporting businesses through multiple avenues. However, some overlap exists in scheme mandates, particularly regarding key account management and business development support, leading to potential confusion for beneficiaries. Effective collaboration exists but relies on individual staff initiative rather than structured practices, sometimes resulting in missed opportunities for comprehensive support. Our review indicated a need for clearer emphasis on fair work, public procurement opportunities, and improved career pathways in the sector.

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Delivery performance and impacts

The evaluation revealed high satisfaction with support delivery, highlighting the expertise and flexibility of delivery teams. Nonetheless, challenges included beneficiary engagement, administrative burdens from RDP funding and unclear exit strategies for support. The food and drink sector in Wales outpaced growth targets, with turnover surpassing £7 billion by 2020, contributing significantly to the economy. While quantifying the impacts of support interventions is complex, they have reportedly generated substantial economic returns and positive environmental outcomes through improved efficiencies, sustainable practices and renewable energy investments. These outcomes align with the sector's strategic objectives, promoting growth, sustainability, and fair work.

Recommendations

Based on the aforementioned findings, the following recommendations are made:

Recommendation 1: Integrate support packages

Integrate the support package more effectively by developing fewer, broader schemes to reduce overlap and duplication. Ensure the central team is well-resourced for effective business support through better triangulation and collaboration.

Recommendation 2: Establish a central access point

Establish a central access point, or “front of shop,” for businesses to access

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support under a unified brand, simplifying navigation through various services.

Recommendation 3: Incorporate business account management

Incorporate business account management for food and drink support within the Business Wales framework to streamline processes and avoid duplication, accompanied by adequate investment in triaging.

Recommendation 4: Allow flexibility for intermediaries

Allow intermediary bodies flexibility to engage directly with new businesses, strengthening established relationships.

Recommendation 5: Identify and target audience

Conduct an exercise to identify and target the most appropriate businesses and subsectors for support, focusing on high-growth potential businesses and subsectors.

Recommendation 6: Launch proactive marketing campaign

Launch a proactive marketing campaign to reach identified target audiences, ensuring engagement beyond the usual participants.

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Recommendation 7: Improve targeting of support

Improve targeting of support to align with economic growth objectives, implementing consistent mechanisms to enforce strategic objectives like fair work and standards.

Recommendation 8: Develop long-term plans

Develop a long-term plan for supported businesses, establishing clear pathways and parameters for their growth and transition.

Recommendation 9: Address gaps in support offer

Address identified gaps in the support offer, such as procurement opportunities and the business graduate pilot program, to enhance sector growth.

Recommendation 10: Invest in local ancillary industries

Invest in local ancillary industries to strengthen supply chains in the food and drink sector, enhancing value retention within Wales.

Contact details

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Views expressed in this report are those of the researchers and not necessarily those of the Welsh Government.

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