

# Contemporary Food Craft Feasibility Study (2019)

Final report

to Coleg Sir Gâr and Coleg Ceredigion



*The means:* to change places for the better.

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# Contents

Executive Summary .....	5
1. Introduction .....	9
1.1. The commission .....	9
1.2. Rationale .....	9
2. The context – a food revolution .....	11
2.1. Trends in the industry .....	11
2.2. Employment, training and support in the food sector.....	12
2.3. Defining artisan and contemporary food craft .....	14
3. Consultation with the food and farming sector in Carmarthenshire and Ceredigion .....	15
3.1. Identifying and mapping the sector .....	15
3.2. Assessing demand and identifying opportunities .....	17
3.3. Key findings and insights .....	17
3.4. Survey Results .....	19
Types of business .....	19
About the business .....	21
Recruiting and training staff .....	22
College courses .....	23
Looking forward to the future .....	25
4. Contemporary Food Craft: A case study overview .....	27
5. Current training provision and facilities within the region.....	31
Coleg Sir Gâr / Coleg Ceredigion .....	31
Food Innovation Wales .....	32
Helix .....	33
Food Centre Wales, Ceredigion County Council .....	33
Aberystwyth Innovation & Enterprise Campus.....	33
6. Example artisan food courses in the UK .....	35
The School of Artisan Food, Nottingham, East Midlands .....	35
Bakery and Patisserie Technology FdSc – Sheffield College, South Yorkshire.....	37
Bakery and Patisserie Technology FdSc, University of Chester (Reaseheath Food Centre), North West England .....	38
7. Contemporary Food Craft – a proposed blueprint and qualification .....	39
Qualification Overview for a new / alternative Level 3 qualification .....	40
8. Conclusions and recommendations.....	41
Appendix 1: Survey format .....	43
Appendix 2: Online contact and social media text .....	49
Appendix 3: FE and local learning provision within the region .....	51
Appendix 4: Example course unit .....	55
Appendix 5: List of consultees and contacts .....	57

## Table of Figures

Figure 1. Survey responses by region .....	16
Figure 2. Survey responses by business type .....	16
Figure 3. Which of the following do you consider your business to be?.....	19
Figure 4. Producers: Which of the following do you specialise in? .....	19
Figure 5. Restaurateurs: Which of the following do you specialise in?.....	20
Figure 6. Age .....	20
Figure 7. How long have you been in business?.....	21
Figure 8. How many people does your business employ?.....	21
Figure 9. Do you have a business premises? .....	21
Figure 10. How often do you source local ingredients? .....	22
Figure 11. Have you experienced difficulty recruiting staff with the appropriate skillset?.....	22
Figure 12. Is there a specific skillset you require from your staff?.....	23
Figure 13. If you have worked with colleges in the past, do you feel that the course content was relevant to your needs? .....	23
Figure 14. Do you feel there is need to develop a course to support artisanal food skills?.....	24
Figure 15. Have you got a training need that's not being provided by the colleges at the moment? Which elements could be delivered at the workplace and which at a further education provider and why? .....	24
Figure 16. Would bespoke, modular units be more value to you than a full-time course? .....	25
Figure 17. Wright's Food Emporium, Llanarthney.....	27
Figure 18. Coaltown Coffee Roasters, Ammanford .....	28
Figure 19. Conti's Ice Cream, Lampeter.....	28
Figure 20. Glebelands Market Garden, Cardigan .....	29
Figure 21. Coleg Sir Gâr and Coleg Ceredigion course, training provision and facilities .....	32
Figure 22. Project HELIX strategic areas .....	33

## Executive Summary

Food culture is experiencing somewhat of a renaissance in the UK. People are aligning their experience of food with changing values; prioritising factors such as quality, ethics and provenance when making choices. The interest is both local and international with travel and trade globalisation resulting in new styles and trends being rapidly adopted. The economic demographic for the region reflects this, showing significant changes in the types of new and growth businesses, especially an increase of artisan and skilled trades such as Micro-breweries and distilleries; Coffee roasters and baristas; Artisan bread makers; Organic wine makers and vineyards; the Charcuterie industry; and artisan cheese makers.

The pace of change makes it ever more necessary to invest in developing a skilled workforce to meet employers' needs and support sustainable business models. But, is the training and support infrastructure keeping pace with this change? It is an issue with far reaching implications for the local economy. There is a sense amongst FE providers in Wales, including the largest in the local area – Coleg Sir Gâr and Coleg Ceredigion – that the current model for catering education has little to say on this rapidly growing area of the food economy. Curricula are increasingly less tailored to the needs of the industry as they are not evolving with the changing landscape of business needs. As such they are less effective as a route to employment and are a less compelling, relevant and contemporary choice to potential students.

Coleg Sir Gâr and Coleg Ceredigion recognise the need to develop a more vibrant and reflective qualification pathway. One which can equip and produce students with relevant skills, but also has the capacity to react quickly to changing trends, and which can influence all aspects of the food chain. Hence, this study identifies, analyses and establishes the need and development of skills and training necessary to meet current demand and trends within the sector.

The study identifies: The nature and scale of trends in consumer demand; The skills needs and opportunities arising from these trends; Recommendations and outline course content for further development. Chapter 1 summarises the commission and rationale.

An aspiration of the Welsh Government and its partners is to 'raise Wales's profile as a high quality Food Tourism destination'. It seeks to do this by improving visitor awareness and access to Welsh food and drink, encouraging hospitality businesses to source Welsh products, and improving skills in sourcing and preparing locally sourced food and drink. Welsh Government set the food and farming priority sector a target of generating £7billion in sales by 2030. It has made efforts to support the sector with strategies such as the 'Towards Sustainable Growth: An Action Plan for the Food and Drink Industry 2014 – 2020'. Notwithstanding a decline in 2016-17 this ambitious target appears achievable. However, the majority of food and drink business units in Wales (86%) are micro-businesses employing fewer than 10 people. These can find training expensive and difficult to source. This was reported by the Welsh Food and Drink Skills Project in December 2014 and the 2018 Regional Employment and Skills Plan. In response Food Skills Cymru was formed in 2018 to provide technical and staff development training. Chapter 2 expands upon these trends and their implications for employment, skills and training within Wales.

An important part of this study is engagement with the industry to understand their skills and training needs to meet current demand and trends. However, the nature and geographical spread of this sector poses a series of challenges. The exercise of mapping relevant businesses consisted of an online word-search using agreed definitions as well as contact with networks, groups and agencies that could support in identifying and contacting those within the industry. Food Innovation Wales' 'Welsh Food and Drink Producers' Directory' and 'Welsh Food & Drink Ingredient Suppliers' Directory' were also reviewed. Through this exercise a database of 194 individuals and businesses was developed. In addition, three relevant networks

and a number of food festivals that operate in the area were contacted and asked for their support in reaching out to their membership. This accounted for a further 50-100 businesses. This led to a spread of interests from the food and farming sector being identified as the main actors and groups to engage with. Regional and national agencies and bodies were also engaged including the Welsh Government, Regional Learning and Skills Partnership South West & Mid Wales, Agriculture and Horticulture Development Board and the National Farmers Union. Chapter 3 describes the Stakeholder Engagement / Communications Plan and the approach taken to identify and map the food and farming sector in Carmarthenshire and Ceredigion.

To assess demand and identify opportunities in-depth discussions were had with the food and farming sector in Carmarthenshire and Ceredigion along with a survey (see Appendix 1) in order to explore:

- a) Carmarthenshire and Ceredigion's food and farming sector's skills and training needs
- b) trends in the sector
- c) the level of demand for a contemporary food craft course.

194 individuals and businesses were directly contacted by telephone, face-to-face and email. Participants were also actively targeted through established networks / groups and social media (Facebook, Twitter and websites). A total of 51 individuals took part in a survey with follow up discussions around specific areas of interest and in-depth discussions. Six key findings and insights along with full survey results are detailed in Chapter 3:

- 1) The right input from the education sector can help reinforce the craft food and drink sector's growth
- 2) Supporting craft food and drink is not just about the craft sector – chains are potential customers and larger producers can adopt craft approaches
- 3) There is a perceived skill gap between potential employees and what craft employers are looking for
- 4) Businesses require a blend of product specific food skills and business expertise
- 5) The sector is willing to be involved in the development and delivery of a course/courses and their involvement will be key to producing the desired outcomes
- 6) Businesses are keen on modular courses and there is the possibility of exploring the use of new media, such as online videos

Reflecting on the size and type of businesses that typify artisan and skilled trades a case study overview of Contemporary Food Craft within Carmarthenshire and Ceredigion is presented in Chapter 4. Four case studies are described: Wright's Food Emporium, Llanarthney; Coaltown Coffee Roasters, Ammanford; Conti's Ice Cream, Lampeter; and Glebelands Market Garden, Cardigan. Each of these engaged in face-to-face and telephone discussions giving their views on skills gaps and needs within the sector.

A number of key characteristics and trends have been identified within the local food and farming sectors along with their implications for the provision of contemporary food craft education. This has informed an approach and criteria for identifying best practice examples of artisan food courses within the UK (Chapters 5 and 6). Three schools, colleges and universities (none within Wales) have been identified within the UK, including: The School of Artisan Food / Nottingham Trent University; Bakery and Patisserie Technology FdSc, Sheffield College; and Bakery and Patisserie Technology FdSc, University of Chester (Reaseheath Food Centre). The criteria used to identify these courses is a focus on practical and theory based learning beyond Level 1 and 2 catering and hospitality, such as: artisan; advanced craft skills; detailed knowledge of food science; contextual studies of provenance, production, preparation and preservation; and an understanding of food trends. Courses and outline course content are contrasted with that currently being provided within Carmarthenshire and Ceredigion, such as that by FE and local learning providers as well as bespoke sector-specific business support offered by the likes of Food Centre Wales, based in Horeb, Llandysul and AberInnovation which will be fully operational by August 2020.

Trends analysis, engagement with the industry and identification of best practice course examples described in earlier chapters has informed this study and identified gaps in educational provision beyond the standardised Level 1 and 2 Professional Cookery and Food & Beverage Service and interest amongst the sector in new / alternative qualifications and training to a Level 3 equivalent that can hone skills around provenance, production, preparation and preservation for horticulture, bakery, dairy, fish and seafood, butchery and charcuterie, patisserie and desserts and beverages (Chapter 7).

Such course(s) could be pioneering in Wales; teaching all aspects of contemporary food and drink production and equipping students with practical skills, technical ability, and contextual understanding.

There is strong support for courses to be designed in conjunction with industry and delivered by professional chefs alongside local artisan producers and practitioners. It would be worth drawing together the FE and local learning sector alongside local industry to further develop options and to engage with the Sector Skills Councils, Awarding Bodies and the Welsh Government. Suggested areas for discussion and further development include:

- A full-time qualification aimed at those seeking to refine their skills and progress from Levels 1 and 2 qualifications in 'Professional Cookery and Food & Beverage Service' whilst developing an appreciation of contemporary food, food trends and business knowledge.
- Modular courses developed in conjunction with industry to provide access to shorter area-specific training that can appeal to businesses wishing to train their staff in a particular skill-set as well as self-employed / self-funding individuals.

There are a series of pedagogical, logistical, and marketing challenges to devising, developing and delivering training to such a diverse workforce such as that represented in the food sector in West Wales. The extent of the disparities that exist between enterprises, and the atomisation of the food sector implies that training content which is relevant to one end of the spectrum could be inappropriate for the other. This is one of the strongest arguments for a modular based approach. However, it is important for individual's progression, and for the health of the sector as a whole, that employees acquire a core set of generic, transferable skills, to underpin the specialisms they acquire. Some "specialisms" will be so niche as to be better approached through on-the-job learning. Making courses as relevant and accessible as possible will support efforts to attract take up from candidates and their sponsors but in itself won't make training a central plank of the strategy to transform the sector and achieve the potential identified in earlier chapters. The marketing push needs to go further and there needs to be a step change which will bring training providers much closer to the industry. The study concludes in Chapter 8 with a series of features that this new relationship will need to exhibit including a network of employers within the food sector locally, training providers and other stakeholders, A desirable outcome would be to establish a different relationship between a core of FE/local training providers and the sector, one in which these training providers are, much better connected to the dispersed enterprises and perceived as a concerned partner committed to collaboration with the industry.

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# 1. Introduction

## 1.1. The commission

*The means* was commissioned by Coleg Sir Gâr with funding from the Rural Development Plan LEADER programmes for Carmarthenshire and Ceredigion to undertake a feasibility study for Contemporary Food Craft. Underpinning this work is a desire to engage with the food and farming industries to identify focused, innovative and fit-for-purpose qualifications that are based upon the sector's needs. The key delivery outcomes of this commission are:

- Evaluation of current Market status
- Consultation with Employers, Enterprises, Agricultural industry and other associated industries to identify skills gaps and specialised need
- Engage and consult with relevant stakeholders
- Mid-term dissemination of findings
- Conclusion and recommendations
- Proposed blueprint of the recommended qualification (Level 3 or higher)
- Identify the training and productivity gaps.
- Identify and develop outline progression pathways and future opportunities for employment

## 1.2. Rationale

Food culture is experiencing somewhat of a renaissance in the UK. Consumer spend on 'experience' as opposed to goods is increasing and people are aligning their experience of food with changing values, prioritising factors such as quality, ethics and provenance when making choices. The interest is both local and international with travel and trade globalisation resulting in new styles and trends being rapidly adopted while environmental concerns mean that e.g. chefs are constantly looking for ways to interpret these trends using local quality ingredients. The economic demographic for the region reflects this, showing significant changes in the types of new and growth businesses, especially an increase of artisan and skilled trades such as: micro-breweries and distilleries; coffee roasters and baristas; artisan bread makers; organic wine makers and vineyards; the charcuterie industry; and artisan cheese makers.

Is the training and support infrastructure keeping pace with this change? It is an issue with far reaching implications for the local economy. Food and farming is already the Welsh Government's priority sector with the greatest number of local units, and food and beverage services are projected to see the biggest increase in employment of any sector other than health.<sup>1</sup> There is a lack of apprentices undertaking craft cuisine apprenticeships within the region in particular at the higher levels including level 3.<sup>2</sup> There is also the potential impact of Brexit to consider, as there has been a reliance on migrant labour within the sector. And yet there is a sense amongst FE providers in Wales, including Coleg Sir Gâr and Coleg Ceredigion, that the current model for catering education has little to say on this rapidly growing area of the food economy. This is particularly apparent in the SW Wales region where anecdotally there is considerable growth through SME and Micro businesses who specialise in artisan foods, production and manufacturing. Curriculums are becoming less tailored to the needs of the industry as they are not evolving with the changing landscape of business needs; focussing on skills in both cooking and service that are employed in traditional routes but

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<sup>1</sup> CCC Curriculum and Labour Market Review (July 2014)

<sup>2</sup> Regional Strategic Planning; Local Delivery RLP Team: Demand and Supply Assessment (2017)

not in the artisan growth areas. As a consequence, these courses are less effective as a route to employment and are a less compelling, relevant and contemporary choice for potential students.

This highlights the need to develop a more vibrant and reflective qualification pathway. One which can equip and produce students with the relevant skills, but also has the capacity to react to quickly changing trends, and which can influence all aspects of the food chain from agriculture, food manufacturing, tourism and hospitality. The pace of change makes it ever more necessary to invest in developing a skilled workforce to meet employers' needs and support sustainable business models.

Food and Farming is one of the industrial cluster groups identified in the Regional Employment and Skills Plan published in July 2017. Its task is described as:

- 1) The creation of training that is fit for purpose with bespoke elements to meet the needs of employers and the industry as a whole. This includes on-going training that supports staff retention, which is currently a significant issue.
- 2) The perception of the sector needs to change amongst learners and parents. More engagement with schools is required to ensure that the sector is portrayed as one that is full of potential and opportunity. This would attract young entrants to the sector and help to alleviate the pressure of an ageing workforce.

Both the Carmarthenshire and Ceredigion LDS themes recognises this. Carmarthenshire LDS theme two is concerned with facilitating pre-commercial development; business partnerships & short supply chains and speaks of:

*Ensuring education provision is aligned to and shaped by employer needs.*

From the Ceredigion LDS perspective, it aligns with theme two, and the following priorities:

- To upskill Ceredigion's employment workforce.
- To improve access by businesses and entrepreneurs to the Higher Education sector and research and development sector to support new and innovative opportunities.

As in other areas of public life there needs to be closer working with the private sector and a deeper appreciation of how it is evolving in a constantly more competitive commercial environment.

## 2. The context – a food revolution

### 2.1. Trends in the industry

There are many reasons why time and effort should be invested in increasing the amount of food that is produced and manufactured in West Wales. There are opportunities for:

- employment creation, skills acquisition, business growth and retention,
- the development of specialism and for raising GVA,
- boosting tourism,
- supporting more sustainable life-styles and protecting the environment.

There are also threats to contend with around food security, supply and climate change that should make us reconsider whether our current ways serve us best. Shockingly just 30 companies handle 30% of all global trade in food<sup>3</sup>. 38% of British food is imported, and the aggregate amount of British food transport totalled 30 billion vehicle kilometres in 2002. According to research undertaken by CPRE, 34% of shoppers see cutting food miles as a key reason to buy locally<sup>4</sup>. In the same study it is also estimated that local food sales support 61,000 jobs across England. Countries, regions, cities and towns are often defined by their foods. A prized food product can create profile and enhance reputation. Wales currently has 15 protected food names<sup>5</sup>. Visitors spend on average 25% of their budget on food. For example in 2013, 89 million tourist day visits were made by UK residents to Wales, spending £3,061 million, of which 40 per cent (£1,219 million) was spent on eating out. Hence there are sufficient motivations to review the operations of the food and farming sector.

Research involving qualitative interviews highlights the potential benefits of food tourism; promoting niche and locally produced products can provide another avenue of support to agriculture.

*The promotion of locally produced quality food products can also engage the tourist in experiences that rekindle gastronomic pleasures and tastes lost or diluted through intensive production, the demise of seasonal products and the lack of food with perceived 'authentic' or 'old fashioned' tastes. These are seen as 'products' that Wales can certainly 'exploit' within the food market-place. Hence the use of food products to promote tourist destinations is largely seen in a positive light although hard evidence of tangible benefits from implementing such policy initiatives is scarce. Without such evidence both the take-up and support for such initiatives has been limited.....Sourcing locally has become a critical issue in maintaining quality food tourism products. The relationship between food producers and the hospitality industry remains largely informal, often poorly structured and ill defined. As a result the hospitality industry, especially at the top end of the market, tends to establish locally based networks which rely on personal contacts to acquire and sustain the supply of quality food products. However, **these arrangements can be time-consuming, are often unreliable and are subject to last-minute changes or cancellation.** This can ultimately impact upon the supply of quality food products.<sup>6</sup>*

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<sup>3</sup> Hungry City: How Food Shapes Our Lives: Carolyn Steel

<sup>4</sup> From field to fork: The value of England's local food webs CPRE

<sup>5</sup> The future of our Food & Drink Industry (2018-19 consultation exercise), Food & Drink Policy Team, Welsh Government

<sup>6</sup> A Taste of Wales – Blas Ar Gymru': institutional malaise in promoting Welsh food tourism products, Andrew Jones and Ian Jenkins

The publication of the Food Tourism Action Plan (2015 - 2020) promotes an ambition to ensure that food tourism is integrated into all Visit Wales activities by 2020 and to 'raise Wales's profile as a high quality Food Tourism destination'. It aims to do this by improving visitor awareness and access to Welsh food and drink, through encouraging hospitality businesses to source Welsh products, and by improving skills in sourcing and preparing locally sourced food and drink.

In the UK the average spend on a meal out has grown at a faster pace than inflation. Within Wales it averages £31 per household per week.<sup>7</sup> The rate of growth though is uneven. As in other consumer sectors the mid-market in prepared foods is being squeezed. The mid-market chains that are experiencing cut backs include household names such as Carluccio's, Jamie Oliver, and Ask. The value proposition typified by street food where the surroundings are pared back but the food itself aims for quality, originality and innovation continues to grow. The grab and go offer is taking more and more floor-space. Coffee bars are increasing in number, replacing pubs which are closing at the reduced but nonetheless catastrophic rate of 2 a day.

Disruption and change is also the dominant mood in food retailing. Aldi and Lidl are snatching more and more market share from Tesco and its peers, whilst the recent publicity around an attempted merger of Sainsbury's and ASDA reflects nervousness around future competition from potential online disruptors such as Amazon. The Kantar Worldpanel report notes that the growth of The Big 4 and Waitrose are lagging behind the total market, which is being pushed by the strong performance of the Discounters, Iceland and M&S. The same report finds that the Welsh grocery market is growing above that of the UK as a whole and is seeing higher levels of price inflation as well as shoppers making more frequent purchases.<sup>8</sup>

## 2.2. Employment, training and support in the food sector

Recruitment, retention and skills within the food sector are a concern and are projected to become more difficult. People 1<sup>st</sup> (part of the Workforce Development Trust) estimated that within the food and hospitality industry 11,000 new chefs will be needed across the UK by 2020. Furthermore, 1.3 million employees will need to be recruited by 2024 of which 975,000 will be replacements for staff that have left. The difference between the two figures, 325,000, is the expected growth in business between now and then.

In 2014 the Welsh Government published a strategic plan for the food and drink industry, *Towards Sustainable Growth: An Action Plan for the Food and Drink Industry 2014 - 2020*. This superseded the *Food For Wales, Food From Wales 2010 - 2020* strategy, which was deemed no longer fit for purpose in 2013.

Welsh Government set the food and farming sector a target of generating £7billion in sales by 2030. It has been estimated that 50,000 new workers need to be recruited into the food and drink industry by 2022 to match these growth targets. In 2015 it employed more than 240,000 people (at its peak with a spike in agricultural employment), generating a £6.8 billion turnover, of which £264 million were exports. The sector had achieved £6.9 billion by 2016 but saw a reduction to £6.5 billion in 2017. There was also a target to increase Gross Value Added of the food and farming sector by 10%, to £1.4 billion annually by 2020. Food and live animal exports were worth £498 million in 2017, with almost half of that being meat and dairy products<sup>9</sup>. By 2018 the sector employed 217,000 people, generating a £6.8 billion turnover and £583m of exports. The decline in employment is attributable to steep falls in 2016-2017 for wholesale, retailing, agriculture and partially catering. This reflects changes within the industry which is experiencing decreases in employment

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<sup>7</sup> Welsh Food and Drink in Numbers, Economic Appraisal research 2018, Business Wales

<sup>8</sup> Kantar Worldpanel report 2018

<sup>9</sup> Derived from State of Wales online <https://stateofwales.com/2018/10/the-welsh-economy-v-industry/>

within agriculture and food retail and increases in the catering sector. The food and drink industry in Wales accounts for 16% of employment, 22% of the total number of business units and 15% of turnover of the non-financial business economy. The majority of food and drink business units in Wales (86%) are micro and employ fewer than 10 people.<sup>10</sup>

The Welsh Food and Drink Skills Project reported in December 2014 that 40% of food businesses had technical skills gaps in their workforce, and identified training needs for 15,000 people per year throughout 2015 – 2022. It made 10 recommendations to address skills gaps and wider issues in the sector.

The greatest training needs lie at the unskilled end of the labour force spectrum. Some of the skills shortage is due to a lack of interest in careers in the industry. This leads to a disconnect as relevant university and college courses have unfilled places, while demand for graduates with relevant qualifications is high.

Work readiness remains an issue within the sector with 51% of respondents identifying that new entrants were not work ready, or work readiness varied amongst new recruits. The most common reasons were that new entrants lacked the skills looked for, the work experience required and entrants tend to have poor attitudes and lack motivation. This was reinforced by discussion within the cluster group which highlighted concerns regarding understanding of the roles required within food processing and manufacturing.<sup>11</sup>

Also highlighted in 2014 was that training can be expensive for many small and medium enterprises, and businesses can find it difficult to source appropriate training for their staff. The recommended actions included mapping training providers across Wales, and developing new approaches to training appropriate to the circumstances faced by small businesses.

The 2018 Regional Employment and Skills Plan reports that:

*A total of 56% of businesses within the sector stated that they experienced barriers to training with the most common reasons being;*

- *can't spare staff time,*
- *lack of funding for training and*
- *lack of appropriate training/qualifications in the subject areas we need.*

The report recommends prioritising efforts to ensure the

*appropriateness of the qualifications within the sector, including apprenticeships frameworks, so that they are fit for purpose in relation to content and delivery mechanisms.<sup>12</sup>*

In February 2018 a £3million funding package was announced by Cabinet Secretary for Energy, Planning and Rural Affairs Lesley Griffiths. 'Food Skills Cymru', run by Lantra, provides technical and staff development training for food and drink companies based in Wales up to 2023. The programme includes accredited and non-accredited training plus in-house company bespoke support. The programme is expected to support 650 businesses during its first three years.

In April 2019 Food Skills Cymru announced a list of training providers who will be responsible for its delivery, stating that there is a "continuous need for bespoke training to enable the food and drink sector to thrive in a competitive environment". Several are within the local region including Coleg Sir Gâr, Dysgu Bro Ceredigion (Adult Community Learning) and Food Centre Wales.

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<sup>10</sup> Economic Appraisal of the Welsh Food and Drink sector – Update 2018 (January 2019).

<sup>11</sup> Regional employment and skills plan 2018

<sup>12</sup> Regional employment and skills plan 2018

## 2.3. Defining artisan and contemporary food craft

There is no legal definition for artisan or contemporary foods. Contemporary food for instance is also sometimes referred to as modern, nouvelle cuisine, fusion etc. As the trend for artisanal food has grown, producers and retailers have been tempted to apply the terms to any number of products. Despite this the terms are broadly accepted as reflecting an emphasis on quality of produce and production. For the purposes of this study we refer to:

- **Artisan, artisanal and artisans** as a person or company skilled in producing, preparing and preserving high-quality and / or distinctive products in small quantities, usually by hand or using traditional methods. This typically includes the 'farm to fork' ethos of locally sourced products. Food types include cheeses, breads and baked goods, charcuterie and other foods that involve preservation or fermentation, oils, vinegars and beverages.
- **Contemporary food** practices focus on the quality of ingredients, freshness, flavour, the manner and conditions in which the ingredient was grown / raised and harvested and the skill in which items are prepared. A few high quality products are prepared with ingredients added to accentuate and not mask their flavour.

## 3. Consultation with the food and farming sector in Carmarthenshire and Ceredigion

### 3.1. Identifying and mapping the sector

The nature and geographical spread of this sector poses a series of challenges in engaging with them. At the outset of the commission a Stakeholder Engagement / Communications Plan was developed in conjunction with Coleg Sir Gâr and Coleg Ceredigion to guide activities and inform development of the consultation process. The objectives were to identify the key stakeholders operating within the food and farming industry and understand their skills and training needs to meet current demand and trends in the sector. The approach aimed to:-

- build a better understanding of the context for any training interventions that arose, and
- the needs of those individuals and groups that would have an interest, and
- to agree and implement key principles for the project and the engagement process that would create firm foundations on which future engagement could be built.

The Stakeholder Engagement / Communications Plan defined a number of key messages around the desired research outcomes and how and with who it was important to engage. This informed the approach to identifying and alerting groups, companies or individuals engaged in a range of different activities. It was agreed that the best means to raising awareness of the project and eliciting responses was through direct contact and the use of social media channels. Appendix 2 'Online contact and social media text' illustrates the approach adopted.

Firstly the appropriate sector and sub-sectors for the industry were identified using the UK's current Standard Industrial Classification (SIC), which classifies business establishments and other statistical units by the type of economic activity in which they are engaged. The UK SIC 2007 classifies the sector as:

- Agriculture, forestry and fishing
- Accommodation and food service activities
- Manufacturing – food products, beverages, tobacco products

The definitions for the full range of business types across the food and farming sector were then identified, with reference to those typically used within the industry and the SIC's hierarchy of section, division, group, class, and sub-class. These types of business include producers, manufacturers/processors, restaurateurs, hoteliers and publicans.

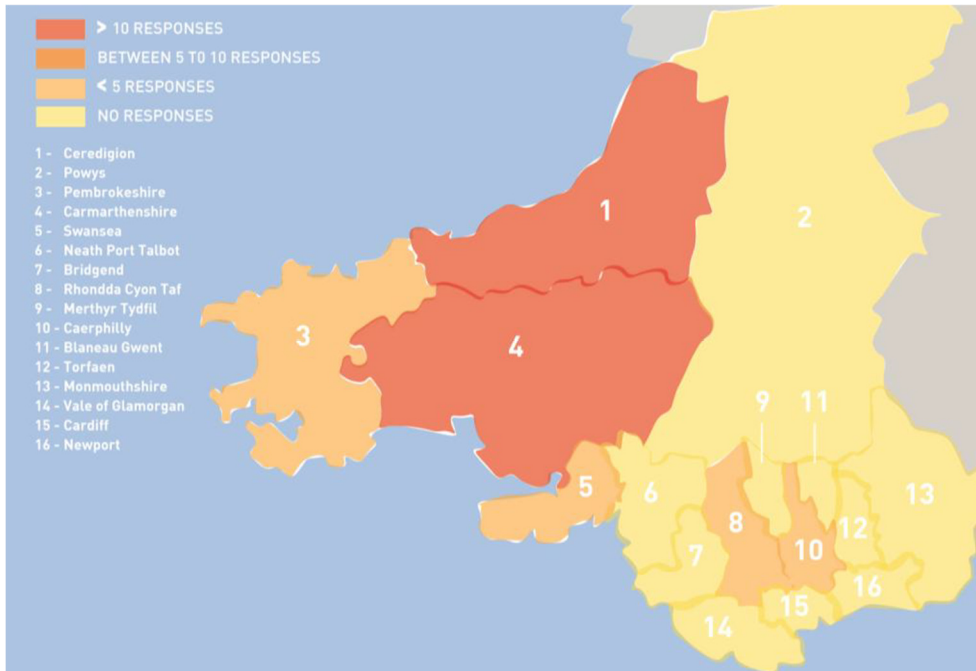
Next, these definitions along with the SIC classifications were used to conduct a mapping exercise of businesses within Carmarthenshire and Ceredigion. The mapping exercise consisted of an online word- search using agreed definitions informed by the client's project preferences as well as contact with networks, groups and agencies that could support in identifying and contacting those within the industry. Food Innovation Wales' 'Welsh Food and Drink Producers' Directory' and 'Welsh Food & Drink Ingredient Suppliers' Directory' were also reviewed. Through this exercise a database of **194** individuals and businesses was developed. In addition, three relevant networks and a number of food festivals that operate in the area were contacted and asked for their support in reaching out to their membership – alerting businesses to the study and the survey. This accounted for a further **50-100** businesses. This led to a spread of interests from the food and farming sector being identified as the main actors and groups to engage with.

A number of awareness raising techniques were used to identify and engage those interested in and prepared to participate in the project and its outcomes, and in gaining further information on potential training support requirements.

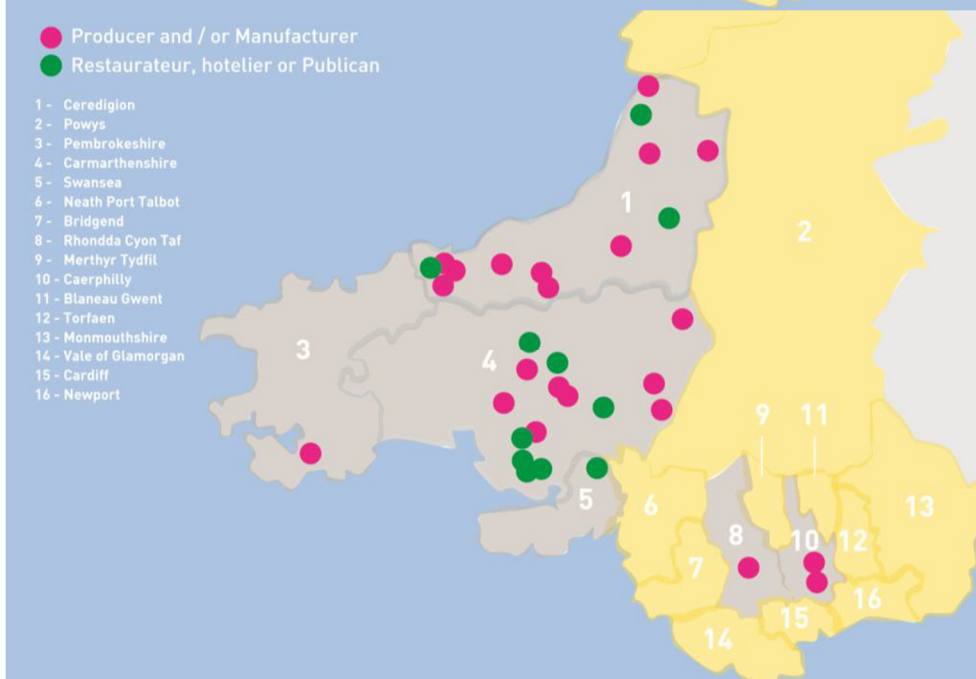
A visual 'stakeholder map' (see figures 1 and 2) illustrates where the respondents are based (for those who were happy to provide locations) and the level of engagement across the two counties. A list of consultees

(other than the survey respondents, a list of whom has been shared directly with the client) is contained in Appendix 5.

Although this study focussed mainly on businesses operating within Carmarthenshire and Ceredigion, responses have been included from some businesses who are based outside of the area but are known to trade within the area e.g. at food festivals.



**Figure 1. Survey responses by region**



**Figure 2. Survey responses by business type**



## 3.2. Assessing demand and identifying opportunities

194 individuals and businesses were directly contacted by telephone, face-to-face and email. Participants were also actively targeted through established networks / groups and social media (Facebook, Twitter and websites). A total of 51 individuals took part in a detailed survey (see Appendix 1) with follow up discussions around specific areas of interest along with in-depth discussions with businesses recommended by the client, agencies and others. The survey's aims were to explore:

- a) Carmarthenshire and Ceredigion's food and farming sector's skills and training needs
- b) trends in the sector
- c) the level of demand for a contemporary food craft course.

The survey sought the views of those operating within the food and farming industry. Due to the project funding this was primarily aimed at those within Carmarthenshire and Ceredigion.

Allied to this a number of companies engaged in face-to-face and telephone discussions; talking about their respective businesses and their views on skills gaps and needs within the sector. Some of these appear as case studies in chapter 4.

Regional and national agencies and bodies were also engaged including the Welsh Government, Regional Learning and Skills Partnership South West & Mid Wales, Agriculture and Horticulture Development Board and the National Farmers Union.

## 3.3. Key findings and insights

The results of the survey are reported more fully in section 3.4. This section draws on and synthesises these results to outline a number of key characteristics and trends within the food and farming sectors and their implications for the provision of contemporary food craft education.

### **1) The right input from the education sector can help reinforce the craft food and drink sector's growth**

Sourcing of local ingredients by businesses strengthens the local supply chain and the family of craft producers. There is already a strong desire amongst respondents for sourcing ingredients locally where possible, with 60% of respondents claiming to always source local ingredients and the remaining respondents sourcing them where possible. This can be reinforced and safeguarded by providing an opportunity for students to understand:

- a) the benefits of sourcing locally and,
- b) the impact of climate, terrain, seasonality and soil type on what can be produced and sourced locally.

Currently there is a sense amongst FE providers in Wales, including the largest in the local area – Coleg Sir Gâr and Coleg Ceredigion – that the model for catering education has little to say on this rapidly growing area of the food economy. Curriculums are increasingly less tailored to the needs of the industry as they are not evolving with the changing landscape of business needs. As such they are less effective as a route to employment and are a less compelling, relevant and contemporary choice to potential students.

### **2) Supporting craft food and drink is not just about the craft sector – chains are potential customers and larger producers can adopt craft approaches**

As one respondent observed, a large part of the hospitality market is occupied by chain businesses. Therefore these make up a significant potential customer base for craft businesses and play a considerable role in the image of local food. In these cases, individual chefs may have limited control over menus and procurement. It is therefore important that modules that give students an appreciation of locality and craft food approaches cut across courses and reach students that may go into a variety of roles from chef-work to management. Doing so will equip students to help larger companies adapt to a future in which customers

are increasingly attracted to the provenance, ethics and stories behind the foods that they purchase. This implies an approach to course design that enables modules to be a part of multiple courses.

**3) There is a perceived skill gap between the requirements of craft employers and the skills of potential employees**

52% of respondents have experienced difficulties recruiting staff. This can be a critical issue for a business seeking to establish itself and expand. These difficulties revolve around students developing inadequate skill sets (66% of businesses said they had a specific skill set requirement), new recruits having unrealistic expectations about the work, or a lack of awareness of how to behave in the workplace. Discussions with the Regional Learning and Skills Partnership South West & Mid Wales (Jane Lewis, Manager and Edward Morgan, Food and Land Management RLSP Industry Group Chair and Group CSR & Training Manager Castell Howell Foods) highlighted similar issues. They referred to the Regional Employment & Skills Plan South West & Mid Wales (2018) and, although this study is framed in the language of craft food, issues quoted by businesses are similar to those across all sectors and sizes.

In response to this, larger businesses operate graduate schemes that aim to shape students to the requirements of the company. But schemes like this are less practicable for small craft producers. However other responses are available such as a focus on educational courses with more practical, on-site elements. Apprenticeships are one model, but not the only one. Any model that involves significant periods of on-site work experience with potential future employers, such as the new T-level model, would help to bridge this gap between students and the requirements of the craft food industry as well as being compatible with respondents' desire for short and modular teaching units.

**4) Businesses require a blend of product specific food skills and business expertise**

Many respondents referred to the differing skill-sets required to make their product versus managing their business effectively. In addition to technical skills related to the industry there is interest in an education in business management and marketing. This is particularly prevalent amongst sole traders and small companies who often require individuals with multiple skill-sets.

**5) The sector is willing to be involved in the development and delivery of a course/courses and their involvement will be key to producing the desired outcomes**

A number of respondents expressed the wish to be actively involved in the learning process in some way, such as supporting students on-site with work experience or by directly teaching students their skills in workshops / modular sessions. Some of these are – such as Wright's Food Emporium and Coaltown Coffee Roasters – took part in in-depth discussions and are included in the case study chapter. This presents an opportunity for a curriculum that exhibits significant links with businesses within the sector, helping to ensure that training is relevant. This approach could help secure longer-term resilience for the course and industry, by ensuring that those elements of the course that involve delivery by businesses remain relevant to the industry as needs change.

**6) Businesses are keen on modular courses and there is the possibility of exploring the use of new media, such as online videos**

The survey illustrated the number of respondents who appear to be self-taught. This points to the potential for on-line self-help tutorials and an interest in short and modular course formats. The exploration of new tools such as digital learning as part of the wider offer could be attractive to a sector that is geographically spread, operating across a broad range of working hours, and embracing a world of online skill sharing

### 3.4. Survey Results

#### Types of business

73% of those who responded classed themselves as producers and /or manufacturers; these are traditionally thought as being a more “hard-to-reach” group.

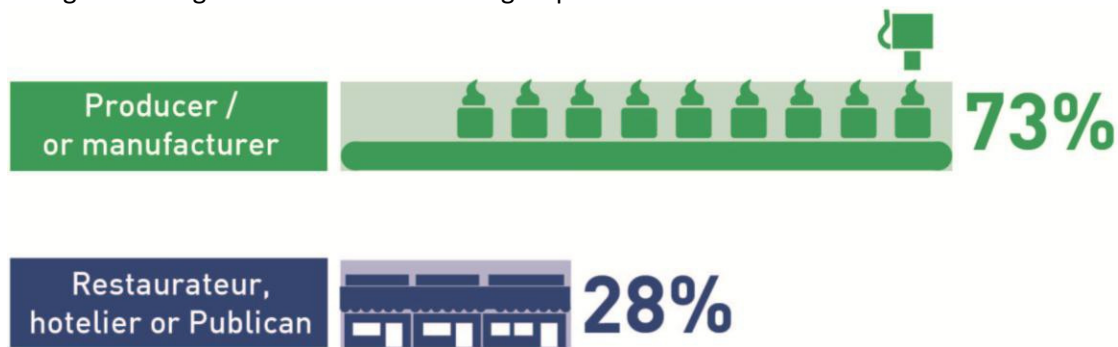


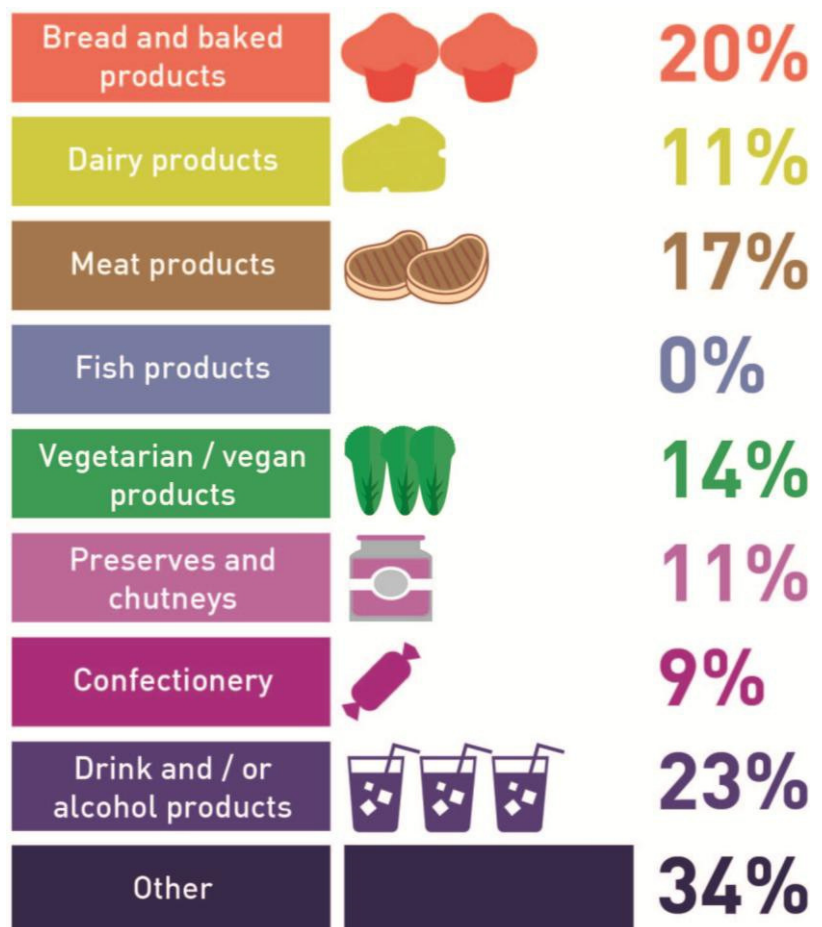
Figure 3. Which of the following do you consider your business to be?

#### Specialities

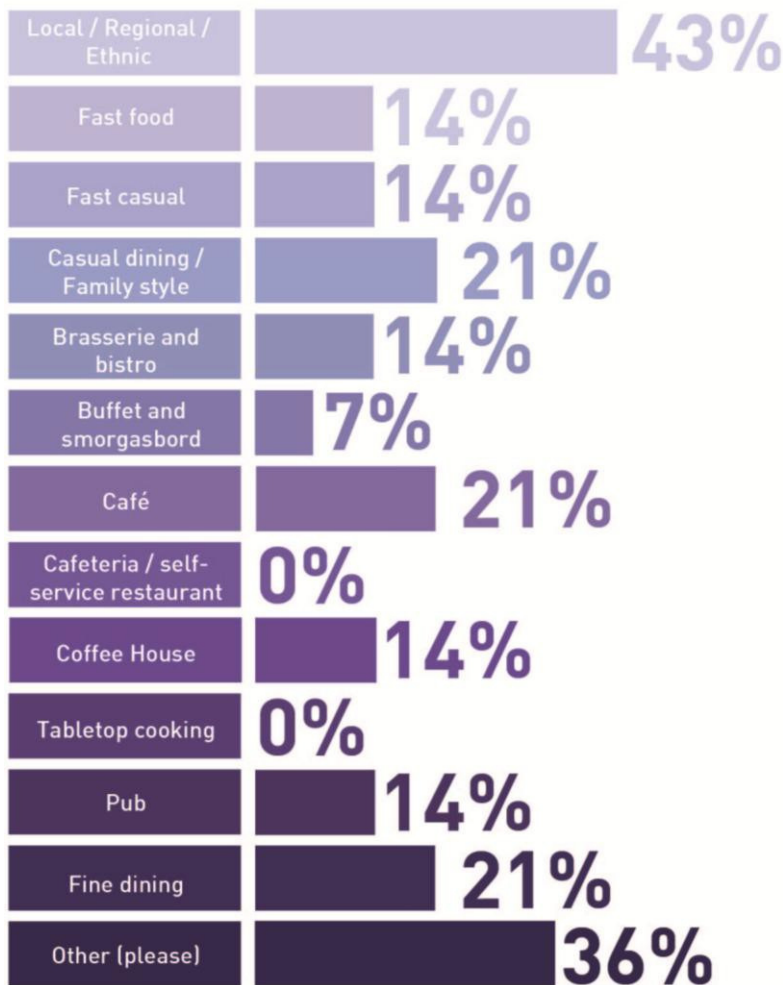
##### Producers and / or manufacturers

Survey respondents varied in terms of specialities with many choosing the ‘other’ option and ranging from products made with honey and chilli to producers of organic fruit and vegetables. The highest number of producers classed themselves as specialising in drink or alcohol related products at 23% (respondees could choose more than one option). This is probably due to the large number of micro-breweries operating in the area. This was closely followed by those producing bread or baked products at 20%. Meat producers made up 17% of survey respondents and dairy producers made up 11% with 14% being made up of those specialising in vegetarian or vegan products. 11% are involved in producing preserves or chutneys and 9% in confectionery. This is a good reflection of the range of products available across the two counties.

Figure 4. Producers: Which of the following do you specialise in?



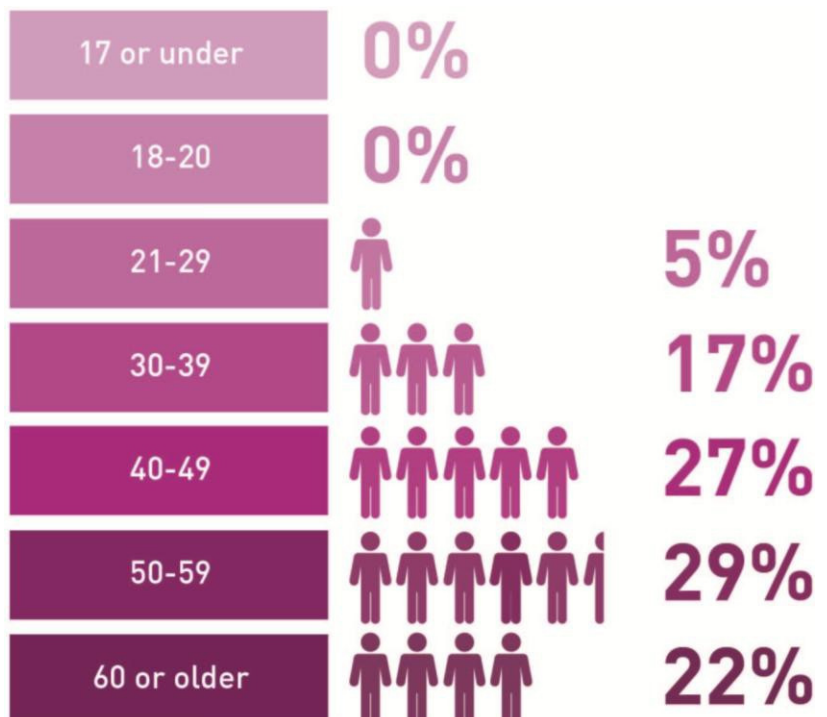
**Restaurants, hotels and pubs**



From the restaurants, hotels and pubs that took part in the survey, 43% of respondents classed themselves as specialising in ‘local, regional and ethnic’ cuisine (respondents could choose more than one option). 36% stated ‘Other’, who mostly identified themselves as street food vendors. Fine dining, cafes, fast casual and family style establishments made up 21% each. Fast food, brasserie and bistro, coffee houses and pubs made up 14% each and buffet and smorgasbord 7%.

**Figure 5. Restaurateurs: Which of the following do you specialise in?**

58% of survey respondents were male. Business owners tended to be towards the older end of the spectrum with 78% of respondents over 40 years old. This could indicate a careers switch after becoming more financially secure and turning what had previously been a hobby into a business. Only 5% of respondents were aged 29 or under which could indicate a lack of confidence, skill or capital required to become entrepreneurs amongst that age group.



**Figure 6. Age**

## About the business

Each respondent was asked how long their business had been in operation. 49% had been in business 1-5 years which reinforces the impression of a growing trend in artisan food production. 33% had been operating for over 10 years and unsurprisingly these were mostly pubs and restaurants with the exception of a market garden and a long-established drinks producer. Only 8% have been in business less than a year. 10% of respondents had been in businesses between 5-10 years. The majority of these appear to be in the farming and horticulture sector but also include a distillery and producers of honey and chutneys.

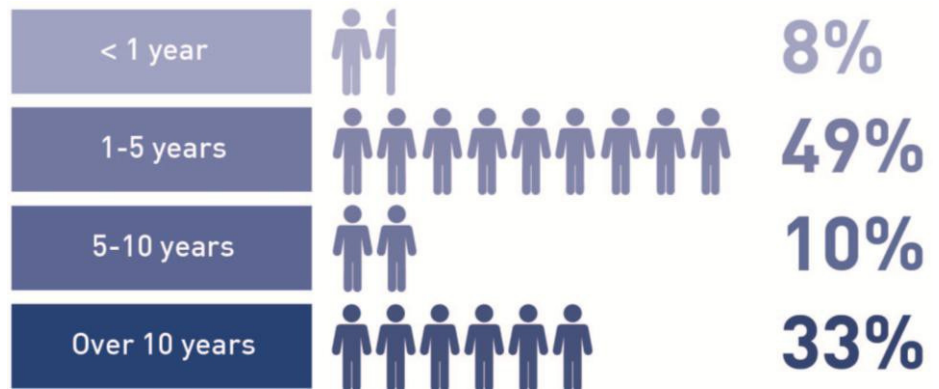


Figure 7. How long have you been in business?

47% of respondents employed between 1-5 members of staff and 29% only the business owner themselves. This is possibly a reflection of the high number of producers responding to the survey. Only 13% of respondents employed over 10 people and 11% between 6-10 people.

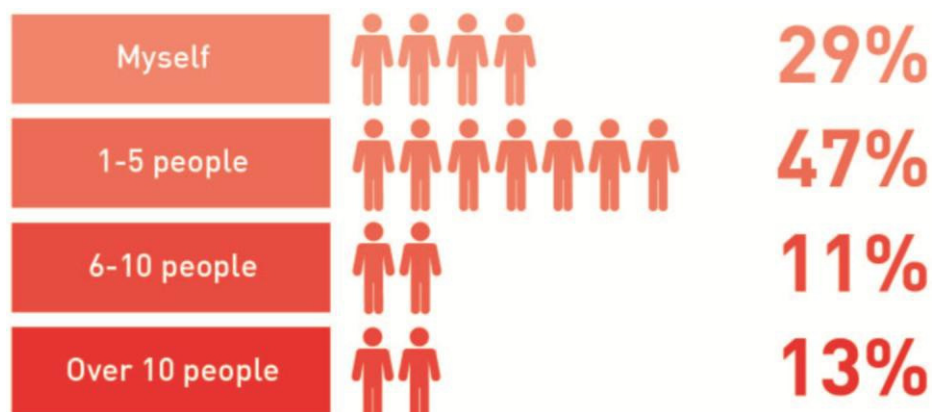


Figure 8. How many people does your business employ?

65% of respondents had a business premises, the remaining 35% more likely being smaller producers who create their products at home.



Figure 9. Do you have a business premises?

60% of those who took part in the survey said that they always sourced local ingredients. The 7% that said they never used local ingredients were all alcoholic drink producers. The majority of ingredients for their purposes would not be able to be sourced from the local area. The 31% of those who said that they sometimes used local ingredients all said that they tried to source locally as much as possible and either felt that the quality may on some occasions not be right or it was simply impossible to source particular ingredients locally.



Figure 10. How often do you source local ingredients?

### Recruiting and training staff

When businesses were asked if they had experienced difficulty recruiting staff with the appropriate skillset, 52% said yes. A variety of reasons were given for this, many appropriate to the sector or the business' speciality product. Broadly these reasons covered: Skills specific to the production of a specialist good; Skills related to marketing a product; and skills related to the operation or growth of the business.

There were comments relating to the lack of trained chefs in the area and in the UK as a whole but also around the core skills and abilities of those who had studied catering to work in a kitchen. For example, one respondent felt that recently recruited staff had little idea of how to manage time in a kitchen environment and although new recruits may have some catering skills, they lacked organisation and people skills. Wages were also brought up as an issue. Jobs in catering tend to be relatively low paid and those leaving college had unrealistic expectations about the level of work they'd be expected to do, and the corresponding wage rate. This corroborates the view amongst FE providers in Wales that the current model for catering education is increasingly less tailored to the needs of the industry as they are not evolving with the changing landscape of business needs.

Difficulties recruiting farm labourers was mentioned but it was clearly stated that this was more about affordability.



Figure 11. Have you experienced difficulty recruiting staff with the appropriate skillset?

66% of respondents said that they required a specific skillset from their staff. Some of those who responded felt that they would not trust staff to be able to produce a product with the same level of quality that they could themselves.

There were a number of comments relating to skills, including not enough knowledge of the rules and regulations around food hygiene. One of the producers commented that because of the specialist nature of their product, it was difficult to recruit staff. There was also the concern over intellectual property and the natural urge to keep their methods confidentially within the business for competitive reasons. Another stated that it was almost impossible to recruit anyone with hands on experience of meat or butchery. They felt they needed staff with skills in handling and cutting meat, breaking down a body of an animal and understanding the processes of making the various products including burgers and sausages.

Many businesses recruited staff purely on their personality as opposed to their skills and qualifications. They felt that this was far more important a consideration, and that the staff could be trained on the job. Fitting in, having an interest and being hard working were seen as being more relevant than formal qualifications.



Figure 12. Is there a specific skillset you require from your staff?

### College courses

Businesses were asked, where they had worked with colleges in the past, and if so whether they felt that the course content was relevant to their needs. 65% felt that this question was not applicable to them, which probably indicates that many businesses within this sector take on staff with no relevant qualifications and were themselves self-taught. Only 19% felt that the training offered by the college was suitable for their needs with 16% saying the course content was not relevant to their business at all. Again, responses here pointed to the need for more training around new regulations and safety legislation.



Figure 13. If you have worked with colleges in the past, do you feel that the course content was relevant to your needs?

Despite the lack of formal training amongst those who completed the survey, 77% of respondents felt that there **was** a need to develop a course or courses to support artisanal food skills, which supports the idea that there is a skills gap and difficulty recruiting staff across the sector (figure 14).

However, one business commented that they felt this should be a part of existing college courses.



Figure 14. Do you feel there is need to develop a course to support artisanal food skills?

There are a variety of considerations depending on which sector(s) or speciality a course focuses on. Horticulture and agriculture were strong themes amongst respondents. There is a growing interest amongst young people in sustainable farming and organic food and those involved in the sector feel there is a need to provide more specific training on growing food and rearing livestock as there is a lack of existing courses in the area. The absence of distilling courses in Wales and also the lack of knowledge around the preparation and cooking of fish were specifically mentioned.

Respondents felt that any new course would also need a focus on business skills including marketing, as these were felt to be essential for those wishing to set up and run their own company.

One business commented that they felt artisan food production should only make up a small section of any course as most outlets are chains and follow specific menus. The business owners drive the menu as opposed to the individual chefs so there is no scope for creativity. However, others were more forward thinking. Although large producers and chain retailers currently make up a majority of the sector, the inclusion of craft skills and local knowledge in the syllabus will equip students to help these companies adapt to a future in which customers are increasingly aware of the provenance, ethics and stories behind the foods that they purchase.



Figure 15. Have you got a training need that's not being provided by the colleges at the moment? Which elements could be delivered at the workplace and which at a further education provider and why?



Lots of businesses appeared to be self-taught as a result of a personal interest, through non-traditional educational routes. One respondent stated that they “learnt most of what I know from YouTube”.

82% of respondents felt that bespoke, modular units would be of more value than a full-time course, which reflects the spread of specialities of those who took part in the survey. Also, time constraints are an issue for most business owners, who feel that short intensive courses would be more useful for them.



**Figure 16.** Would bespoke, modular units be more value to you than a full-time course?

### Looking forward to the future

It is important that this work begins to build a foundation for a network that can bring the project’s objectives to life. Contacts made through this study can act as a first step in gathering a network who can be actively involved in training, work experience placements and providing subsequent employment opportunities. A creative and useful step to bring together the different stakeholders could initially be in the form of a focus group. The group could discuss this report’s findings and further explore the identified need and the development and training necessary to meet current demands. Sharing the information in an event such as this can, if carefully managed, not only unearth insights and evidence but also build interest and capacity amongst local businesses for collective, collaborative actions. The group would become a positive force for change within the sector and with how others interact with the industry. Other areas of work worth pursuing are influencing and forming policy and change. A core of businesses, training providers and stakeholders (such as the Regional Learning and Skills Partnership South West & Mid Wales) have been identified which can form the basis of this group.

71% of respondents indicated that they would like to be kept informed about the progress of the project with 61% being happy to receive information from the college that may be beneficial to the business. 76% would be interested in attending a workshop to discuss training and related needs. This could form part of a next phase of work.

A number of businesses indicated that they would be more than happy to be involved in providing training courses around their product or speciality. One in particular felt that as a business they do not get approached for apprenticeships or work experience and would love to do more work with the FE and local learning sector.

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## 4. Contemporary Food Craft: A case study overview

Reflecting on the size and type of businesses that typify artisan and skilled trades a case study overview of Contemporary Food Craft within Carmarthenshire and Ceredigion is presented below. Four case studies are described. In each case owners and managers engaged in face-to-face and telephone discussions; talking about their respective businesses and their views on skills gaps and needs within the sector.

### Wright's Food Emporium, Llanarthney

Restaurateur Simon Wright, who once ran the award-winning Y Polyn, has transformed a former pub into a restaurant, delicatessen and wine shop that has become well known and popular in the area. The cafe and deli prepare and sell goods, breads and cakes many of which are produced in-house. There is refillable wine and cider from barrel to bottle. Wright's sources local produce whenever possible. Simon is passionate about where his ingredients come from and how they are prepared. Simon believes that current college courses do not equip catering students with the skills that they need to work in the industry and he has struggled at times to find suitable staff to work in his establishments. He believes that **"students need to be taught more about where produce comes from in order to help them understand how best to create dishes using a range of ingredients"**.

Simon has long been an advocate for a course around artisan food production.



Figure 17. Wright's Food Emporium, Llanarthney

### Coaltown Coffee Roasters, Ammanford

Coaltown Coffee has been a huge success story for the area over recent years. Owner Stott James's parents ran a café when he was younger so he has been around coffee all of his life and visited roasteries with them as a child. He started the company as a wholesale business in 2013 with 30 customers but now has over 200 international wholesale customers and two Espresso Bars with a third opening soon. The roastery in Ammanford is the second biggest open roastery in the world, second only to San Francisco.

Scott has taught himself about the coffee industry, has had no formal training and left school with very few GCSEs. He recruits staff **“primarily on personality, the potential to fit in within the organisation and interest in coffee”**. Due to the specialist nature of his products he provides on the job training. A new member of staff can shadow a trained Barista for up to six months.

**Scott supports the need for of an artisan course and has expressed an interest in contributing towards its development particularly around coffee.**



Figure 18. Coal town Coffee Roasters, Ammanford

## Conti's Ice Cream, Lampeter

The Conti family have been producing artisan ice cream in Lampeter for five generations. The ice cream is made using a family recipe known only to three family members. The product is sold locally in the café and wholesale to around 22 stockists. The business has a small production premises on the outskirts of Lampeter which employs three staff members. The Conti's use local, Welsh produce as much as possible and are in the process of developing a new flavour using Merlyn Welsh Cream Liqueur following the trend of collaboration amongst artisan food producers.

Conti's recruit staff based on willingness to learn and reliability. They offer training including food hygiene and production. Conti's support the proposal to develop an artisan food course. They wish to **“gain knowledge around new product development and design and marketing”** as these are currently all done in-house through self-taught methods.



Figure 19. Conti's Ice Cream, Lampeter

## Glebelands Market Garden, Cardigan

Glebelands Market Garden grows vegetables on an eight-acre organic site near Cardigan. They sell to local restaurants, shops and other businesses as well as direct to the public through their onsite farm shop. The business website offers information to those interested in sustainable food production and advice to those setting up market gardens and other food production units. Glebelands concentrates on leafy and salad crops and uses well-established techniques such as on-site composting, crop rotation and green manure crops to maintain soil fertility and plant health, as well as cutting edge techniques to extend the season wherever possible. They employ 7-11 seasonal staff. They recruit through word of mouth and provide on the job the training. Glebelands have observed that ***“despite a lack of formal training courses in horticulture there is a wave of market garden businesses opening in the area”***.

**Glebelands would support the development of a course with a strong horticultural element.**



Figure 20. Glebelands Market Garden, Cardigan

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## 5. Current training provision and facilities within the region

Several organisations were identified and engaged to determine the type and level of existing catering and hospitality training provision within the region. These included FE providers and the local learning sector along with specialist food centres. Current provision encompasses practical and theory-based courses from foundation to Level 3, employer training courses and bespoke sector-specific business support.

Much of the practical and theory-based courses that extend from foundation to Level 3 are delivered by Coleg Sir Gâr and Coleg Ceredigion. Courses provide students with professional cookery, food safety, food hygiene and team working skills. Professional training restaurants are located on three campuses; Pibwrlwyd, Aberystwyth and Cardigan. Employer training courses are available for 'Food, Drink & Hospitality' and 'Land based & Agriculture' along with 'Skills for Industry' – subsidised, sector-specific training for business – within Carmarthenshire.

Several well-known facilities operate within the region, providing bespoke sector-specific business support and product development. Food Centre Wales, based in Horeb, Llandysul, alongside two partner organisations – based in Llangefni, North Wales and Cardiff – operate Food Innovation Wales and Project HELIX. A new facility which will be fully operational by August 2020 – AberInnovation – is a bioscience, agri-tech, and food and drinks facility led by Aberystwyth University in partnership with the Biotechnology and Biological Sciences Research Council (BBSRC).

Further information is provided below.

Based on emerging criteria from consultation with the industry and training providers there is currently no comprehensive provision in the region, or indeed Wales, at a sufficiently advanced level where courses focus on practical and theory-based learning such as: artisan; advanced craft skills; detailed knowledge of food science; contextual studies of provenance, production, preparation and preservation; and an understanding of food trends.

There are however examples within England that are expanded upon in chapter 6. Discussions with these providers has identified a number of relevant course types, key components and supporting information such as progression pathways and future opportunities for employment that can inform a blueprint for a course(s) in the local region.

### **Coleg Sir Gâr / Coleg Ceredigion**

The college provides course in Professional Cookery and Food Service as well as employer targeted courses in Food, Drink & Hospitality and Landbased & Agriculture. The majority of students undertaking Professional Cookery and Food Service progress from L1 to L2 (1 year courses) and then either on to L3 or into employment or an apprenticeship. The Foundation Apprenticeship is a work based learning programme where the learner is 'earning while learning'. The apprentice will attend college on a day release basis. A central element of each course is the work related experience. All learners run the service at one of the onsite training restaurants. Students study a variety of restaurant and kitchen units. The core units focus on food safety, hygiene and working effectively as a team. Other units cover topics such as preparing and cooking meat, fish, poultry, vegetables and eggs, cooking bread products, preparing food and drinks and preparing and serving food at the table.

Training courses and support offered to employers include:

- Food, Drink & Hospitality: new qualifications such as Food Excellence, onsite training and work based learning and bespoke training events.
- Land Based & Agriculture: a range of qualifications through the college's centre of excellence and bespoke training events.

- Skills for Industry project that delivers subsidised, sector-specific training for business, organisations and the self-employed from industry qualifications to NVQs at level one to six.

Provision	Coleg Sir Gâr	Coleg Ceredigion
<b>Courses – Individuals</b>	Catering, Hospitality & Tourism: <ul style="list-style-type: none"> <li>• Foundation Apprenticeship - Catering and Hospitality</li> <li>• Professional Cookery and Food Service L1</li> <li>• Professional Cookery and Food Service L2</li> </ul>	Hospitality & Catering: <ul style="list-style-type: none"> <li>• Level 1 Diploma in Professional Cookery and Food &amp; Beverage Service</li> <li>• Level 2 Diploma in Professional Cookery and Food &amp; Beverage Service</li> <li>• Level 3 Supervision Food and Beverage Service and Diploma in Professional Cookery Preparation and Cooking</li> </ul>
<b>Courses – Employers</b>	<ul style="list-style-type: none"> <li>• Food, Drink &amp; Hospitality (Pibwrlwyd Campus and on-site)</li> <li>• Landbased &amp; Agriculture (Gelli Aur campus)</li> <li>• Skills for Industry</li> </ul>	
<b>Facilities</b>	<ul style="list-style-type: none"> <li>• Merlin’s restaurant (Pibwrlwyd Campus)</li> <li>• Coleg Sir Gâr Farm (Gelli Aur campus)</li> <li>• Agricultural Research Centre (Gelli Aur)</li> <li>• Small Animal and Equine Centre (Pibwrlwyd Campus)</li> </ul>	<ul style="list-style-type: none"> <li>• @Aberista professional training restaurant (Aberystwyth campus)</li> <li>• Park Place professional training restaurant (Cardigan campus)</li> </ul>

**Figure 21. Coleg Sir Gâr and Coleg Ceredigion course, training provision and facilities**

Additional information about course content and facilities is contained within Appendix 3.

## Food Innovation Wales

Backed by the Welsh Government, Food Innovation Wales is a collaboration between three food centres of excellence that are dedicated to encouraging the development of the food sector and providing technical and operational support on all aspects of food manufacturing. Dedicated teams and facilities are located at: The Food Technology Centre, Grwp Llandrillo Menai (North Wales); Food Centre Wales, Ceredigion County Council (Mid Wales); and ZERO2FIVE Food Industry Centre, Cardiff Metropolitan University (South Wales).

Food Innovation Wales aims to be the go-to resource for support, advice and creative ideas to help businesses start, expand, and find solutions to technical operational challenges.

The centres’ mission is to:

- Stimulate innovation and support new product development which benefits food and drink companies
- Work together to meet the needs of food and drink companies
- Share scientific, technical and other relevant information including statistics and research
- Contribute actively towards achieving Welsh Government’s ambitious goals for the development of the food and drink industry in Wales
- Respond to technical enquiries from food companies



## Helix

Project HELIX is a pan-Wales strategic initiative being delivered by the three partners that make up Food Innovation Wales. Launched in June 2016, with £21m through the European Agricultural Fund for Rural Development, the initiative aims to develop and deliver academic and practical knowledge transfer activity focused on food innovation, food efficiency and food strategy to increase production and reduce waste in the food chain. Project HELIX gathers information on food production, trends and waste from around the world and transfers the knowledge to food producers and manufacturers across Wales. Businesses can receive support through 18 actions within three strategic areas:

Food Innovation	Food Efficiency	Food Strategy
New Product Development	Systems Development	Innovation Framework
Technical Information	Process Controls	3rd Party Accreditation
New Business Start Up	Product Efficiency	Public Engagement
Added Value	Site Design	Industry Intelligence
Food Legislation	Packaging Food	Business Development
Product Reformulation	Validation of Systems	Training, Mentoring & Skills

**Figure 22. Project HELIX strategic areas**

## Food Centre Wales, Ceredigion County Council

Food Centre Wales plays a strategic role in supporting the Welsh food industry and provides technical services to business start-ups, SMEs and national food manufacturers. Established by Ceredigion County Council in 1996 as a dedicated food technology centre it delivers high quality knowledge transfer, advice and practical support to businesses in a wide range of food sectors throughout Wales and beyond. The centre comprises a suite of modern facilities alongside consultancy and advice services. The 880 square metre Innovation and Manufacturing Hub has four separate process areas, along with smaller trial kitchens that enable clients to test the latest equipment and develop new food products. Its commercial manufacturing capabilities include consultancy services in third party accreditation, factory design, food safety, legislation, new product development and product assessment. The Centre also manages four “specially designed incubator units to give start-ups industry standard premises and a supportive environment in which to establish a firm foothold in the industry”.

## Aberystwyth Innovation & Enterprise Campus

AberInnovation – Aberystwyth Innovation and Enterprise Campus – will provide world-leading facilities and expertise within the bioscience, agri-tech, and food and drinks sectors. The £40.5m campus, which will be fully operational by August 2020, is being led by Aberystwyth University in partnership with the Biotechnology and Biological Sciences Research Council (BBSRC), and is intended to be a key asset in the region’s priority sectors of Food and Farming and Life Sciences. AberInnovation will offer a range of high quality facilities to support innovation; enabling commercial enterprises to grow, prosper and drive economic growth in the food and drink, bio-processing and biotechnology sectors throughout Wales and beyond. The campus will contain several complimentary features including an analytical science centre; bio refining centre; Future Food centre, seed biobank and processing facility and a hub area which will facilitate collaborative research projects between the University and private sector in the bio-economy. The project is expected to create in excess of a 100 jobs in the agri-tech industry and related fields once fully operational, creating demand in terms of higher level scientific skills.

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## 6. Example artisan food courses in the UK

A number of key characteristics and trends have been identified within the local food and farming sectors along with their implications for the provision of contemporary food craft education. This has informed the approach and criteria for identifying best practice examples of artisan food courses within the UK. Three schools, colleges and universities have been identified, none within Wales, which are innovating in the field. These, include:

- The School of Artisan Food / Nottingham Trent University;
- Bakery and Patisserie Technology FdSc, Sheffield College; and
- Bakery and Patisserie Technology FdSc, University of Chester (Reaseheath Food Centre).

The criteria used to identify these courses is a focus on practical and theory-based learning beyond Level 1 and 2 catering and hospitality, such as: artisan; advanced craft skills; detailed knowledge of food science; contextual studies of provenance, production, preparation and preservation; and an understanding of food trends.

Discussions with these providers has identified a number of relevant course types, key components and supporting information such as progression pathways and future opportunities for employment that can inform a blueprint for a course(s) in the local region.

### The School of Artisan Food, Nottingham, East Midlands

The School of Artisan Food which opened in 2009 in Sherwood Forest teaches wide ranging aspects of artisan food production. People of all skill levels are given the opportunity to expand their knowledge through a wide range of short courses and a full-time Advanced Diploma in Artisan Baking. Courses are taught by skilled and experienced artisan producers and practitioners. The programme focuses on handmade food. The School teaches practical and enjoyable ways to produce food, understand why it is produced in a particular way, what other alternatives there are and future trends. The School offers a range of bespoke programmes for sole traders and multi-national companies; creating customised courses to support business requirements. Courses are designed for:

- Existing practitioners who wish to develop their knowledge and skills
- People who are interested in starting an artisan food enterprise
- Enthusiastic amateurs
- Beginners

### Artisan Food FDSC (with Nottingham Trent University)

#### Year One

- *Artisan Bread Production* - Theory and practical bread making sessions, developing understanding of the fermentation process and critical key stages to bread making. Recipe formulation and raw bread material function in fermented baking.
- *Patisserie and Viennoiserie* - The ingredients, artisan production methods, baking techniques, and vocabulary associated with artisan patisserie and viennoiserie, technical skills needed to produce a variety of different artisan products.
- *Artisan Dairy Production* - Background to the UK dairy industry including sourcing, quality of milk and cattle breeds. The production of dairy products, including a range of cheese types and practical sessions to manufacture hard and soft cheeses, cream, butter, yoghurt and ice cream.
- *Food Chemistry* - Key scientific principles relevant to food science, including the constituents of food and the effects these have on both their properties and functions. Skills to undertake simple laboratory analysis of food and interpret the data.
- *Artisan Business Entrepreneurship and Marketing* - Skills to plan an independent artisan business, including an overview of the key choices facing a start-up food business, and developing a realistic

marketing proposition for an artisan food business. Sustainability, ethical and health issues relating to food production, consumption and quality, and how this relates to producers.

## **Year Two**

Placement year for students on the three-year course.

## **Final Year**

- *Consumer Nutrition and Health* - Understanding of human nutrition and the ability to analyse foods for macronutrients associated with nutrition and allergies. How consumer nutrition needs and trends affect product development, processing and packaging.
- *Advanced Artisan Bread Production* - Complex bread-making techniques and underpinning theoretical knowledge. Larger batch production and the requirements of this scale of production.
- *Artisan Business Operations and Finance* - Tools to operate an independent artisan business and understand the associated finance including feasibility, and start-up options.
- *Artisan Business Planning* - How to develop a financially robust business plan for an artisan start-up and pitch to investors. An understanding of return on investment and its application in business planning, and risk management within an artisan food business.
- *Food Industry Employability* - Developing a portfolio and professional social media profile. Continued professional development, and engagement with the university employability team to improve future graduate work prospects.
- One optional module to be chosen:
  - *Artisan Butchery and Charcuterie* - Insight into traditional butchery methods and techniques focusing on three main meat animals - pigs, cattle and sheep. Basic anatomy, knife skills, an overview of livestock production, and the principles of transforming meat into charcuterie using curing, fermentation and smoking.
  - *Advanced Viennoiserie and Chocolate Patisserie* - Ingredients, advanced artisan production methods, and baking techniques required to produce a range of chocolate products, chocolate patisserie, and French patisserie and viennoiserie products. Knowledge of the composition of various cocoa beans and how and where they are grown.

## **Advanced Diploma**

The School of Artisan Food offers the UK's first Advanced Diploma in Artisan Baking. Accredited by FDQ (a subsidiary of The Food and Drink Training and Education Council Ltd) the six-month, full-time, intensive course is the equivalent of a foundation degree level qualification. The Advanced Diploma combines hands-on training in bread making, patisserie and viennoiserie with contextual study that focuses on the food landscape and how to establish a food business start-up.

## **Short courses**

The School offers a wide range of short courses, ranging from demonstrations and half-day taster sessions to intensive week long masterclasses, in a variety of subjects including:

- Baking
- Brewing and drinks
- Butchery
- Cheese making
- Children's courses
- Chocolate making
- Curing & smoking
- Cooking
- Food business start-ups

- Food photography
- Foraging & growing
- Ice cream making
- Patisserie
- Preserving and Fermentation

## Bakery and Patisserie Technology FdSc – Sheffield College, South Yorkshire

The Foundation Degree is designed to develop the advanced craft skills required to work professionally in the bakery/confectionery industry. Validated by University College Birmingham and developed in consultation with industry, this course teaches practical skills, technical ability and business knowledge.

### Year One (Level 4)

- *Introduction to Patisserie* - Pastry, fillings, sponges, mousses, glazes and desserts, history and origin of patisserie products and how they have become classic desserts.
- *Bakery and Confectionery Science* - Introduction to bakery science in terms of both cereal science and finished products. Principles of the core food molecules (proteins, fats, and carbohydrates) and specific processes such as fermentation and raising agents will be described using bread, cakes, biscuits and pastry as examples.
- *Artisan Bread - Production and Appraisal* - Hands on skills and technical knowledge to produce and appraise a range of bread making methods which can be categorized as "Artisanal". Methods and styles of bread making studied will include: sponge and dough, sour dough starters, levains, poolish and bigas.
- *Specialist Confectionery* - Specialist confectionery skills, how ingredients work together in order to form specific products. A main focus of this module will be the examination of specialist ingredients such as flour, sugar confectionery and chocolate.
- *Food Safety and Hygiene* - Introduction to the main food hygiene theories and practices. Focus on current food hygiene legislation requires food businesses to develop and implement a food safety management system based around HACCP, students will learn how to devise and implement such a system.
- Optional Modules:
  - Managing for Profit
  - Diet and Nutrition

### Year Two (Level 5)

- *Advanced Confectionery and Chocolate* - Broaden skills and knowledge using industry methods and processes in confectionery and chocolate.
- *Contemporary Bread Production* - Students produce the products and study the technical aspects of typical bread and morning goods found on UK retailers' shelves. Where possible, automated food manufacture process is replicated by the students in practical settings.
- *Quality Assurance* - Series of practical sessions designed to demonstrate the implementation of key quality systems. The assessment uses case study scenarios in a food manufacturing context to develop student's insight in relation to hazard controls, traceability and specification design. Quality Assurance in food manufacturing offers sought after wide and varied careers.
- *Food Production Management* - Ethical and financial pressures are driving the food industry to adopt cost-focused and environmentally responsible processes. Key aspects of management and control in food production as well as the responsibilities and challenges facing food production managers, customer buying behaviour and the type of market the food production unit will serve.
- *Contemporary Patisserie* - Introduction to all the essential elements of professional pastry production, including working with tempered chocolate and boiled sugar.
- Optional Modules:

- Enterprise Start-up Studies
- Product Design and Process Development

## **Bakery and Patisserie Technology FdSc, University of Chester (Reaseheath Food Centre), North West England**

The course develops practical skills in bread making, sugar and chocolate work, patisserie and desserts. It explores the science behind each of the product sectors, equipping students with a rounded knowledge of the bakery and patisserie industry. A key focus is the development of practical skills in the first year and an understanding of industrial automated production methods in the second year.

### **Year 1 modules**

- Food safety in manufacturing
- Flour technology
- Sugar and chocolate technology
- Artisan bakery skills
- Business studies with law
- Food materials and product manufacture
- Food science and composition
- Introductory bakery skills

### **Year 2**

- Food innovation and new product development
- Applied nutrition in the food industry
- Research methods
- Artisan patisserie and desserts
- Processing and quality assurance of baked goods
- Word based learning for land-based industries

## 7. Contemporary Food Craft – a proposed blueprint and qualification

A new wave of food business is growing at an extraordinary rate internationally. Although they are diverse, what they have in common and typify is a desire for quality and authenticity. This taps into a consumer market that increasingly identifies with these same values. Key examples are craft beer, coffee, bread making, natural wine, charcuterie, and artisan cheeses. This move to a vibrant food culture is evident across all aspects of the food chain from agriculture, through food manufacture to hospitality. Highly motivated and entrepreneurial people who use food as an exciting canvas for their creativity and bring these qualities to the making of the food, their business models and marketing are increasingly important to the success and sustainability of the industry.

Trends analysis, engagement with the industry and identification of best practice course examples described in earlier chapters has informed this study and identified gaps in educational provision beyond the standardised Level 1 and 2 Professional Cookery and Food & Beverage Service and interest amongst the sector in new / alternative qualifications and training to a Level 3 equivalent that can hone skills around provenance, production, preparation and preservation for horticulture, bakery, dairy, fish and seafood, butchery and charcuterie, patisserie and desserts and beverages.

Given the increasing importance of contemporary food businesses and the evolving skills requirements within the industry it is essential for individual's progression, and for the health of the sector as a whole, that employees acquire a core set of generic, transferable skills, to underpin future specialisms. Some "specialisms" will be so niche as to be better approached through on-the-job learning.

However, devising, developing and delivering training to a diverse workforce such as that represented in the food sector in the South West and Mid Wales region, presents a series of challenges. Disparities exist between enterprises, and the atomisation of the food sector in West Wales. Different establishments and the skill requirements involved in food and beverage production and preparation varies enormously. This implies that training content that is relevant to one end of the spectrum could be inappropriate for the other. The geography of the area – a large area and relatively sparsely populated – has implications for journey times and transport connections. These factors, alongside views expressed by the sector, suggest that a modular based approach should be considered as part of any training provision. Making courses as relevant and accessible as possible will support efforts to attract take up from candidates and their sponsors.

Such course(s) could be pioneering in Wales; teaching all aspects of contemporary food and drink production and equipping students with practical skills, technical ability, and contextual understanding.

The course(s) should be designed to develop the advanced craft skills required to work professionally in the industry. These course(s) would provide a progression pathway from Level 2 Professional Cookery and Food & Beverage Service for those studying a full course and specific skill-sets for those seeking modular courses. The course(s) would be aimed primarily at: Students who have successfully undertaken a Level 2 qualification in cookery and beverage services; Practitioners who wish to develop their knowledge and skills; People who are interested in starting a craft / artisan food enterprise.

There is strong support for courses to be designed in conjunction with industry and delivered by professional chefs alongside local artisan producers and practitioners. It would be worth drawing together the FE and local learning sector alongside local industry to further develop options and to engage with the Sector Skills Councils, Awarding Bodies and the Welsh Government. Suggested areas for discussion and further development include:

- A full-time qualification aimed at those seeking to refine their skills and progress from Levels 1 and 2 qualifications in 'Professional Cookery and Food & Beverage Service' whilst developing an appreciation of contemporary food, food trends and business knowledge. A course designed to provide learners with

an expansive knowledge that reflects the interconnected nature of food in the modern world. A strong emphasis on entrepreneurship, enterprise, and the opportunities of the new food economy can form central strands. The course would benefit from being taught through a variety of mediums, provide hands-on experience in growing and cooking, and be closely integrated with successful businesses in contemporary food craft.

- Modular courses developed in conjunction with industry to provide access to shorter area-specific training that can appeal to businesses wishing to train their staff in a particular skill-set as well as self-employed / self-funding individuals. In such circumstances short, intensive periods of training, with elongated days or even a residential component has advantages over the traditional forms of day or block release. The objective being to optimise the ratio of time training participation/contact to overall time invested, including travel.

A proposed qualification overview for further development is summarised below.

### Qualification Overview for a new / alternative Level 3 qualification

- **Food safety and hygiene to include (Award in food safety in catering H/502/0132)** – Introduction to food hygiene legislation, theories and practices. Devising and implementing a food safety management system. Understanding quality assurance and packaging.
- **Enterprise within contemporary craft food and drink** – Introduction to running a food and drink business. Thinking creatively about enterprise in the craft food and drink sector. Business Planning and risk management.
- **Contemporary food and drink culture** – Food chemistry and composition – food science principles; properties and functions. Nutrition and health – applied nutrition. Food innovation and product development. Understanding how nutrition and trends affects product development.
- **Horticulture (fruit and vegetables)** – Horticulture – cultivation, processing and use. Techniques, soil & water management, establishing and managing crops, harvesting and marketing.
- **Bakery** – Advanced techniques and theoretical knowledge. Bakery science, principles of the core food molecules and processes such as fermentation and raising agents. Methods, styles and recipes including dough starters, bread, sponges, cakes, pastry and biscuits.
- **Dairy** – Knowledge of the Welsh dairy industry including sourcing, quality of milk and cattle breeds. The production of dairy products, including a range of local cheese types and practical sessions to manufacture hard and soft cheeses, cream, butter, yoghurt and ice cream.
- **Fish and seafood** – Traditional fishmongery methods and techniques focusing on local fish and seafood. Anatomy, knife skills, overview of seafood production and storing, cooking skills and preservation principles using curing (fermentation, pickling and smoking).
- **Butchery and charcuterie** – Traditional butchery methods and techniques focusing on three animals - pigs, cattle and sheep. Anatomy, knife skills, overview of livestock production, cooking skills and the principles of transforming meat into charcuterie using curing, fermentation and smoking.
- **Patisserie and desserts** – Advanced techniques and theoretical knowledge. Bakery science, principles of the core food molecules and processes. Pastry, fillings, mousses, glazes and desserts, Methods and processes in confectionery and chocolate.
- **Coffee, wine, beer, and spirits** – History and trends. Knowledge of vinification, brewing and distilling techniques, varieties and taste notes. Food chemistry – pairing and links with food. Serving – process, temperature and techniques.

See appendix 4 for an example course unit



## 8. Conclusions and recommendations

**This study has identified gaps in educational provision beyond the standardised Level 1 and 2 Professional Cookery and Food & Beverage Service and interest amongst the sector in new / alternative qualifications and training to a Level 3 equivalent that can hone skills around provenance, production, preparation and preservation for horticulture, bakery, dairy, fish and seafood, butchery and charcuterie, patisserie and desserts and beverages. Such course(s) could be pioneering in Wales; teaching all aspects of contemporary food and drink production and equipping students with practical skills, technical ability, and contextual understanding.**

Devising, developing and delivering training to a diverse workforce such as that represented in the food sector in West Wales, presents a series of pedagogical, logistical, and marketing challenges.

Our mapping and review of current activity illustrates the extent of the disparities that exist between enterprises, and the atomisation of the food sector in West Wales. These statements can also apply to the sub-sectors. Taking for example that of *pub-grub*, the offer from different establishments and the skill requirements involved in its production and preparation varies enormously, with the implication that training content that is relevant to one end of the spectrum could be inappropriate for the other. This is one of the strongest arguments for a modular based approach.

However, it is important for individual's progression, and for the health of the sector as a whole, that employees acquire a core set of generic, transferable skills, to underpin the specialisms they acquire. And some "specialisms" will be so niche as to be better approached through on-the-job learning.

That West Wales is both a large area and relatively sparsely populated, with all that means for journey times and transport connections, also favours a more modular delivery of off-the-job training. In such circumstances short, intensive periods of training, with elongated days or even a residential component has advantages over the traditional forms of day or block release. The objective being to optimise the ratio of time training participation/contact to overall time invested, including travel.

Making courses as relevant and accessible as possible will support efforts to attract take up from candidates and their sponsors. But better accessibility falls into the category of necessary but not sufficient. In itself, it will achieve incremental improvement but will fall short of the objective of making training a central plank of the strategy to transform the sector and achieve the potential identified in earlier chapters.

The marketing push needs to go further and there needs to be a step change that will bring training providers much closer to the industry. This new relationship we believe will need to exhibit at least 5 features:

1. A meaningful feedback loop that allows participants, employers and attendees on training courses to continually refine the training product on offer, and introduce new aspects to the curriculum as food innovation and fashion progresses.
2. The maintenance of a network of employers within the food sector locally, training providers and other stakeholders, based on the 194 enterprises identified in this mapping exercise, and progressively building on it. The network could operate virtually, but be punctuated with events such as those suggested below, in order to solidify the sense of community. This network can be instrumental in training, work experience placements and providing subsequent employment opportunities and in so doing developing a flagship programme for the region and Wales.
3. The college should be influential in establishing and sustaining the network. Potentially playing the leading part.
4. The focus of activity should be on *industry needs*, not exclusively *training concerns*. For example an annual Food Fair could be organised along the lines of industry trade events. There would be an

opportunity for celebrating what is already good in the sector locally but also for promoting and learning from the best innovation from elsewhere with relevance to this locale.

5. Support and help should be provided to showcase the sector locally and nationally through pooling the costs of attending important events, and producing marketing collateral. For example during the course of this study, discussions took place with London's Borough Market about exhibiting there on St David's Day 2020.

A desirable outcome would be to establish a different relationship between a core of FE/local training providers and the sector, one in which these training providers are

- perceived as a concerned partner, committed to working with the industry in transforming standards and performance
- much better connected to the dispersed enterprises, enjoying a creative dialogue and through that conversation able to enrol participants onto new customizable offer(s)

## Appendix 1: Survey format

The survey was conducted face-to-face, via telephone and was made available online.



*The means:* to change places for the better.



### INTRODUCTORY PAGE

Artisanal food is increasingly popular, with a growing demand for food and products with ‘provenance’ linked to local identity. This is changing the skills and knowledge required throughout the food supply chain. Given the growing importance of the sector to the economy and to local identity, there is increasing desire to identify shared needs and opportunities for the education sector’s offer to support its growth.

Coleg Sir Gâr and Coleg Ceredigion, with the support of a number of local businesses across Carmarthenshire and Ceredigion, are undertaking a contemporary food craft feasibility study. They are keen to understand the views and the skills needs of those operating and working within the food, drink and farming sectors; entrepreneurs, growers, manufacturers and consumer facing retailers and restaurants.

What follows is a short survey. You are under no obligation or commitment by completing this survey. All information obtained will be anonymised and any further contact will only be made according to your preferences. The means is committed to upholding your privacy rights. We will only use your personal information for lawful purposes. If you have agreed to share information, such as to receive further contact, this will only be provided to Coleg Sir Gâr and Coleg Ceredigion. This survey should take no longer than 5 minutes to complete.

**Q1 Which of the following do you consider your business to be?**

- Producer and or Manufacturer
- Restaurateur, hotelier or Publican

IF PRODUCER – ONLINE SURVEY WILL REDIRECT TO Q2

IF RESTAURANTEUR – ONLINE SURVEY WILL REDIRECT TO Q3

**Q2 If a producer and/or manufacturer: Which of the following do you specialise in? (You can choose more than one option)**

- Bread and baked products
- Dairy products
- Meat products
- Fish products
- Vegetarian / vegan products
- Preserves and chutneys
- Confectionery
- Alcohol products
- Other, please specify

ONLINE SURVEY WILL THEN REDIRECT TO Q4

**Q3 If a restaurateur, hotelier or publican: Which of the following do you specialise in? (You can choose more than one option)**

- Local / Regional / Ethnic
- Fast food
- Fast casual
- Casual dining / Family style
- Brasserie and bistro
- Buffet and smorgasbord
- Café
- Cafeteria / self-service restaurant
- Coffee House
- Tabletop cooking
- Pub
- Fine dining
- Other, please specify

**Q4 How long have you been in business?**

- Less than a year
- One to five years
- 5 to 10 years
- Over 10 years

**Q5 Do you have a business premises?**

- Yes
- No

IF NO – ONLINE SURVEY WILL REDIRECT TO Q7

**Q6 If yes, please enter the first three/four digits of the post code**

**Q7 How often do you source local ingredients?**

- Always
- Sometimes
- Occasionally / rarely
- Never

Comments:

**Q8 How many people does your business employ?**

- Myself
- 1-5 people
- 6-10 people
- Over 10 people

**Q9 Have you experienced difficulty recruiting staff with the appropriate skillset?**

- Yes
- No
- N/A
- Comments

**Q10 Is there a specific skillset you require from your staff?**

- Yes
- No
- N/A
- Comments

**Q11** If you have worked with colleges in the past, do you feel that the course content was relevant to your needs?

- Yes
- No
- N/A
- Comments

**Q12** Do you feel there is a need to develop a course(s) to support artisanal food skills?

- Yes
- No
- Comments

**Q13** Have you got a training need that's not being provided by the colleges at the moment. Which elements could be delivered at the workplace and which at a further education provider and why?

**Q14** Would bespoke, modular units be of more value to you than a full-time course?

- Yes
- No
- Comments:

**Q15** Would it be useful to convene a workshop to discuss training and related needs?

- Yes

No

Comments:

**Q16 Would you like further information about this project or to be kept informed of progress?**

- Yes - please get in touch for a further discussion
- Yes - please keep me informed of future developments
- No

**Q17 Would you like to receive other information from Coleg Sir Gâr and Coleg Ceredigion that may be beneficial for you / your business?**

- Yes please
- No thanks

**Q18 Please provide contact details (optional)**

Name:  
Organisation (if applicable)  
Telephone / mobile:

**Q19 What is your age? (optional)**

- 17 or younger
- 18-20
- 21-29
- 30-39
- 40-49
- 50-59
- 60 or older

**Q20 What is your gender? (optional)**

- Female
- Male
- Other

**Q21 Please use the space below to make any further comments**

END

*The means:* to change places for the better



## Appendix 2: Online contact and social media text

### Introductory text for online survey

Artisanal food is increasingly popular, with a growing demand for food and products with ‘provenance’ linked to local identity. This is changing the skills and knowledge required throughout the food supply chain. Given the growing importance of the sector to the economy and to local identity, there is increasing desire to identify shared needs and opportunities for the education sector’s offer to support its growth.

Coleg Sir Gâr and Coleg Ceredigion, with the support of a number of local businesses across Carmarthenshire and Ceredigion, are undertaking a contemporary food craft feasibility study. They are keen to understand the views and the skills needs of those operating and working within the food, drink and farming sectors; entrepreneurs, growers, manufacturers and consumer facing retailers and restaurants.

What follows is a short survey. You are under no obligation or commitment by completing this survey. All information obtained will be anonymised and any further contact will only be made according to your preferences. The means is committed to upholding your privacy rights. We will only use your personal information for lawful purposes. If you have agreed to share information, such as to receive further contact, this will only be provided to Coleg Sir Gâr and Coleg Ceredigion. This survey should take no longer than 5 minutes to complete.

### Twitter

Do you work in the food, drink and farming sectors? Are you an entrepreneur, grower, manufacturer or consumer facing retailer or restaurateur? How are changes to the sector affecting your skills and knowledge requirements? Please share your views [www.surveymonkey.co.uk/r/foodcraft](http://www.surveymonkey.co.uk/r/foodcraft)

### Facebook

Artisanal food is increasingly popular, with a growing demand for food and products with ‘provenance’ linked to local identity. This is changing the skills and knowledge required throughout the food supply chain. Given the growing importance of the sector to the economy and to local identity, there is increasing desire to identify shared needs and opportunities for the education sector’s offer to support its growth. Do you work within the within the food, drink and farming sectors? Are you an entrepreneur, grower, manufacturer or consumer facing retailer or restaurateur? Coleg Sir Gâr and Coleg Ceredigion are keen to understand your views and skills needs.

Please share your views here <https://www.surveymonkey.co.uk/r/foodcraft>

QR\_code foodcraft:



# Appendix 3: FE and local learning provision within the region

## Coleg Sir Gâr

### Courses

#### Individuals

##### Catering, Hospitality & Tourism:

- Foundation Apprenticeship - Catering and Hospitality. Awarding body, CG. Sector, FE. Programme length, 1-2 years. Pibwrlwyd campus.
  - A Foundation Apprenticeship is a work based learning programme where the learner is 'earning while learning'. The apprentice will attend college on a day release basis. Learners who have successfully completed this Foundation Apprenticeship can progress onto an Apprenticeship at Level 3.
  - Learners following this Foundation Apprenticeship will have to achieve a framework of qualifications which will include: Level 2 NVQ Diploma in Professional Cookery or Level 2 Diploma in Hospitality; Essential Skills Wales Application of Number Level 1; Essential Skills Wales Communication Level 1; Employee Rights and Responsibilities.
- Professional Cookery and Food Service L1. Awarding body, CG. Sector, FE. Programme length, 1 year. Pibwrlwyd campus.
  - The majority of students use this course as a stepping-stone to a Level 2 programme in Professional Cookery or Hospitality and Tourism. Others learners to progress to an apprenticeship or employment.
  - A central element of the course is the work related experience. All learners run the service at Merlins, the onsite training restaurant. Students study a variety of restaurant and kitchen units. The core units focus on food safety, hygiene and working effectively as a team. Other units cover topics such as preparing and cooking meat, fish, poultry, vegetables and eggs, cooking bread products, preparing food and drinks and preparing and serving food at the table.
- Professional Cookery and Food Service L2. Awarding body, CG. Sector, FE. Programme length, 1 year FT. Pibwrlwyd campus.
  - The majority of students use this course as a progression onto a Level 3 programme in Professional Cookery, Hospitality Services or into an apprenticeship.
  - A central element of the course is the work related experience. All learners run the service at Merlins, the onsite training restaurant. The core units focus on effective team work, food safety and hygiene. Other units cover topics such as preparing meat fish poultry and vegetable dishes, making stocks soups and sauces, bread making and baking cakes, sponges and pastries and desserts, cocktail making, preparing hot beverages and serving customers.

#### Employers (training courses)

##### Food, Drink & Hospitality:

- In partnership with the local food, drink and hospitality sector the college has developed new qualifications such as *Food Excellence* to meet the needs of organisations who are seeking to refine their menu choice.
- As well as offering training at the dedicated catering facility at Pibwrlwyd campus the college can also conduct onsite training and work based learning with individuals and companies from Aberystwyth to Newport.

- Bespoke training events can be tailored to meet employer needs. Popular qualifications and courses include: First Aid; Food Safety; Food Excellence; and Customer Service.

#### Land Based & Agriculture:

- The college's Gelli Aur Campus is a centre of excellence in the agriculture sector. It provides agricultural courses at both further and higher education levels and engages with high profile projects.
- Current projects include: the transformation of slurry into a dry fertilizer and drinkable water; and eradication of Bovine Viral Diarrhoea. Learners and organisations have the choice of completing entire qualifications or a selection of modules which they feel best support their business and training needs.
- Bespoke training events can be tailored to meet employer needs. Popular qualifications and courses include: cattle foot trimming; pesticides; telescopic lift truck; tractor driving; chainsaw maintenance; and tree felling.

#### **Employers (Skills for Industry)**

Skills for Industry is a project that delivers subsidised, sector-specific training for business, organisations and the self-employed from industry qualifications to NVQs at level one to six. Training is industry specific, delivered onsite, easy to access and flexible to the needs of the company. It is part-funded by the European Social Fund through the Welsh Government. Skills for Industry is able to adapt quickly and effectively as legislation changes to update workforce qualifications. Food is one of eleven priority sectors.

#### Facilities

##### **Merlin's**

Merlin's restaurant based at Pibwrlwyd is the college's training facility for aspiring chefs and maître d' staff. Merlin's has enabled those following professional cookery and hospitality courses to serve the public in a real restaurant environment, providing them with valued industry and customer experience. Many former students have progressed to work in top London restaurants such as Claridge's and L'Esgargot. Tutors at the college are industry experienced and with the support of employers aim to prepare students with the practical and theoretical elements of working in the industry. Merlin's welcomes some of the county's top guest chefs throughout the year to work with students and produce special menus and events for the public. A small facility within the restaurant can also be hired by external parties for seminars and meetings.

##### **Coleg Sir Gâr Farm and the Agricultural Research Centre (Gelli Aur campus)**

Coleg Sir Gâr is one of the leading further education providers of land-based programmes in the UK. Agricultural, forestry, countryside management and land-based engineering courses are located at the college's purpose built farm campus near Llandeilo. The College farms 344 hectares in the Tywi Valley. There are 500 milking cows split into two herds, allowing an evaluation of two different herd management strategies. There is also a small beef enterprise and a flock of breeding ewes.

The research centre facilitates the development of the Welsh agricultural industry through proactive technology transfer and the provision of specialist advice. Conference facilities are available for seminars and meetings. The facilities are supported by a dedicated team of lecturers, trainers and technical support staff along with catering provision.

##### **Small Animal and Equine Centre (Pibwrlwyd campus)**

The centre boasts facilities including an indoor and outdoor riding school, an aviary and exotic animal care for reptiles, fish and amphibians.

## Coleg Ceredigion

### Courses

#### Hospitality & Catering:

- Level 1 Diploma in Professional Cookery and Food & Beverage Service. Awarding body, CG. Sector, FE. Programme length, 1 year. Aberystwyth and Cardigan campuses.
  - The majority of students use this course to progress to a Level 2 programme in Professional Cookery Food and Beverage Service, Hospitality and Tourism, an apprenticeship or into employment.
  - A central element of the course is the work related experience. All learners operate the service at Merlin's, the on-site training restaurant.
- Level 2 Diploma in Professional Cookery and Food & Beverage Service. Awarding body, CG. Sector, FE. Programme length, 1 year. Aberystwyth and Cardigan campuses.
  - The majority of students use this course as a progression onto a Level 3 programme in Professional Cookery, Hospitality Services or into employment or an apprenticeship. Students prepare a range of dishes that allow them to develop knife skills, and knowledge of a variety of cooking methods and food preparation techniques. Students learn how to prepare and serve drinks and develop the skills needed in a food service environment.
  - A central element of the course is the work related experience. All learners run the service at Merlin's, the on-site training restaurant. Students gain a realistic view of the demands of working in the catering industry.
- Level 3 Supervision Food and Beverage Service and Diploma in Professional Cookery Preparation and Cooking. Awarding body, CG. Sector, FE. Programme length, 1 year. Aberystwyth and Cardigan campuses.
  - The majority of students use this course to progress directly into employment. Students prepare a wide range of dishes that allow them to develop knife skills, and knowledge of a variety of cooking methods and food preparation techniques. Students learn how to prepare and serve drinks and develop the skills needed for a food service environment.
  - A central element of the course is the work related experience. Level 3 learners take a lead running the service at Merlin's, the on-site training restaurant. Students gain a realistic view of the demands of working in the restaurant industry and are taught more advanced culinary and food service skills by experienced staff through lively demonstrations and practical skills sessions.

### Facilities

#### **@Aberista (Aberystwyth campus)**

The professional training restaurant enables students to learn their trade using up-to-date equipment while perfecting the technical skills required to prepare, cook and serve high quality dishes in a contemporary setting where the decor reflects the coastal locality. An elliptical demonstration island is used to cook in front of customers and provides the focus for regular evening events with local chefs and former students who showcase their establishments alongside the students. The restaurant is open to the public on Tuesdays and Wednesdays for coffee and lunch along with regular pop-up evening events. Previous learners have progressed to work in top hotels and restaurants in London and Cardiff including The Ritz, The Ivy and The Potted Pig.

#### **Park Place (Cardigan campus)**

This professional training restaurant prides itself on creating a warm and welcoming atmosphere for community guests. The restaurant is open on Tuesday, Wednesday and Thursday lunch times between 12-2 and offers a varied range of menus for the public over the academic year. A number of themed evenings are run throughout the year.

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## Appendix 4: Example course unit

### Butchery and charcuterie – provenance, production, preparation, preservation

#### Purpose and Aim:

To develop wide-ranging knowledge of traditional butchery methods and techniques extending the entire length of the food chain. Focus on three animals – pigs, cattle and sheep. Anatomy, knife skills, overview of livestock production, cooking skills and the principles of transforming meat into charcuterie using curing, fermentation and smoking.

- Factors that determine the quality, quantity and value of the meat we eat.
- Issues surrounding farming methods and meat processing (e.g. climate change, food security and diet)
- Practical experience and understanding of the major cooking methods and preservation.

Learning outcomes	Assessment criteria
The learner will:	The learner can:
Understand why we rear certain animals in the regional context – Provenance	<ul style="list-style-type: none"> <li>• Place meat production in a regional context</li> <li>• Explain how environmental factors such as landscape and climate impact on meat production</li> <li>• Place the rearing of animals for meat in the context of markets and other economic factors</li> <li>• Identify native and heritage breeds</li> </ul>
Understand how we rear animals for consumption – Production	<ul style="list-style-type: none"> <li>• Identify different feeding systems and their outcomes</li> <li>• Show an appreciation of the possible impacts of climate change on animal farming</li> <li>• Show a broad understanding of the debate on sustainable farming and the future of food production</li> <li>• Identify the key differences in farming systems (in particular conventional or organic and scale of production)</li> </ul>
Understand how we prepare meat products for consumption – Preparation	<ul style="list-style-type: none"> <li>• Demonstrate a broad understanding of the systems of animal slaughter</li> <li>• Demonstrate a broad understanding of large-scale meat production and distribution</li> <li>• Identify and demonstrate the major cuts of meat used in butchery in respect of cattle, sheep and pigs</li> <li>• Identify and show an ability to execute the key cooking methods for different types of meat</li> <li>• Place meat cookery in a cultural and historical context</li> </ul>
Understand how and why we preserve meat – Preservation	<ul style="list-style-type: none"> <li>• Explain the principles of curing and demonstrate the practical ability to transform meat into charcuterie using curing, fermentation and smoking</li> <li>• Explain the process, purpose and effect of freezing</li> <li>• Explain the process, purpose and effect of canning</li> </ul>

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## Appendix 5: List of consultees and contacts

1176 (Cardigan Castle)  
Agriculture and Horticulture Development Board  
Albert Rees Ltd  
Altaia  
Bang on Brewery  
Bara Menyn Bakehouse & Café  
Baravin  
Bee Dazzled  
Black Lion Hotel  
Black Mountain Foods  
Blaun Camel Farm  
Boelyn's  
Bonafide Cider Co  
Bont Brew  
Bosun's Locker  
Bryngwyn Newydd  
Buffalo Dairy  
Butchers Arms  
Caemorgan Mansion  
Café @ No 4  
Cake DeeVine  
Cakes by Caroline  
Calon Cakes  
Cardigan Bay Brownies  
Cardigan Bay Fish  
Casa del Cymru  
Case For Cooking  
Castle Green  
Caws Cenarth  
Caws Teifi  
Celtic Country Wines  
Celtic Crab Products  
Celtic preserves  
Celtic Pride  
Charcutier Ltd  
Chocolate Fusion  
Cilgwenyn Bees  
Coaltown Coffee Roasters  
Coffi Teifi Coffee  
Coland Rise Farm Meats  
Coleg Ceredigion  
Coleg Sir Gâr  
Conrah Hotel

Contempo Catering  
Contis Ice Cream  
Conti's Ice Cream  
Corran Resort & Spa  
Cothi Valley  
Cowpots luxury Jersey Ice Cream  
Cresselly Arms  
Crwst  
Cusan Welsh Cream Liqueur  
Cwmcerrig Farm  
Cwtsch Chocolate  
Da Mhile Distillery  
Eccentric Gin  
El Salsa  
Emlyn Hotel  
Face of Flowers  
Falcondale Country House  
Felin Ganol Watermill  
Felin Talgarth  
FelinFoel Brewery  
Fishermans Rest  
Flat Rock Bistro  
Food Centre Wales/Food Innovation Wales  
Food Skills Cymru/Lantra  
Fori Foods  
Four Seasons Hotel  
Frank's Ice Cream  
Fwdge  
Gareth's Delicious Delights  
Glebelands Market Garden  
Goatylicious  
Goggi's Cuisine  
Good and Proper Brownies  
Got Cake  
Gower View Foods  
Grey Alders  
Gut Instinct  
Gwella (Aberystwyth) Ltd  
Gwesty Cymru  
Hafod Welsh Organic Cheddar  
Harbourmaster  
Heavenly  
Hoggets Hog Roasts  
Hot roasted nuts  
Ice Cube Tea

Jabajak Vineyard  
Jenkins Bakery  
Jin Talog  
Jonah Fish  
Le Casablanca  
Liliwen Herbs  
Little Black Hen  
Little Devil's HEavenly Bakes  
Little Grandmas Kitchen  
Llanboidy Cheesemakers  
Llanelly House  
Lleucu's Cakes  
Lolfa Cafe  
Machynys Brasserie  
Maesyfynnin Mushrooms  
Mantle Brewery  
Mario's Ice Cream  
Mark Webb & Son(butcher)  
Marvellous Superfood Ltd  
Marzano's  
Merlin Cheeses  
Middleware Catering  
Mount Bar & Grill  
My Vintage Delights  
Nanteos Mansion Country House  
Nanyclyd Farm  
National Farmers Union  
Naturally Scrumptious  
New Quay Honey Farm  
Ninkee  
Nom Nom Chocolate  
NOODLES TO GO  
Nottingham Trent University  
Oakley Burgers  
Oliver Bird Welsh Food  
Oscar's Kitchen  
Parson's Pickles  
Pembrokeshire Chilli Farm  
Penlan Brewery  
Penlan Preserves  
Penrhiwllan InnBar & Rest  
Pentre Arms Hotel  
Pepper Pot Bar & Grill  
Phillip Hughes Butcher  
Popty Bach y Wlad

Popty Cara  
Prima Foods  
Pysgoty  
Rachel's Dairy  
Recipe for Health UK  
Regional Learning and Skills Partnership South West & Mid Wales  
Rhosyn Farm Produce  
Rhosyn Farm Produce  
Roger's Butchers  
Rogue Preserves  
Ruby's  
Sancler organic yoghurt cheese  
Sarah Bunton Chocolates  
Sheffield College  
Simon J's Pizzeria  
Sloppy Joes Street Food  
SpiceThyme  
Stawberry Shortcake  
Stradey Park Hotel & Spa  
Swshi  
Tafarn Morlais  
Tast Natur  
Teifi Farmhouse Cheese  
The Baker's Pig  
The Bridge  
The Castle Hotel  
The Cawdor  
The Cliff Hotel  
The Clockwork Tavern  
The College Inn  
The Daffodil  
The Ginhaus  
The Hangout  
The Kings Arms  
The Llwyndafydd Inn  
The Mountain Gate  
The New Curiosity  
The Pear Tree  
The Phoenix  
The Pink Peppercorn  
The Salutation  
The Tieifi Toastie Company  
The Tynllidiart Arms  
The Warren  
The White Heart

The York Palace  
ThePlough Inn  
Thomas Arms  
Tin Works Brewing Company  
TisieTiesen  
Toloja Orchards  
Tovali Drinks  
Tregroes Waffle Bakery  
Troedyrhiw organics  
Tropical Forest Products Ltd  
Ty Mawr  
Ultracomida-Rest & Deli  
University of Chester  
Valans  
Watson & Pratts-organic & seasonal produce  
Waunwyllt  
Welsh Cottage Cakes  
Welsh Government  
Wenallt Hive  
Whitfords  
Woodland Bees  
Wright's Food Emporium  
Y Blac  
Y Ffarmers  
Y Polyn  
Y Talbot  
Yo-cart and Waffle'licious

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