

Local Food on the Isles of Scilly: Exploring the Potential for Increasing Supply and Demand

Workshop Report

November 23rd 2010

St Mary's

Funded by the Isles of Scilly Area of Outstanding Natural Beauty
(AONB) Partnership
Project co-organised by the Isles of Scilly AONB Partnership and
Transition Scilly

Facilitated by Joy Carey
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1. Executive Summary

The aim of the half-day workshop was to explore the potential for increasing supply and demand for local food in Scilly.

The workshop considered the legacy of previous local food initiatives and the policy context for future initiatives.

The workshop identified examples of existing good practice, obstacles to future local food initiatives, and untapped potential in local food production and supply in Scilly.

Key resolutions revolved around the need for coordination within the land-based sector in order to enhance supply and demand, to improve communication, and to scope opportunities e.g. access to land; holistic land management that integrates food production, non-food crops (flowers) and conservation; marketing and branding.

Three high priority actions were identified, each of which requires resourcing:

- Establish a Scilly land management forum to coordinate and champion an integrated approach to food production, flower growing and conservation;
- Quantify Scilly's available local food and the markets (actual and potential) for local food;
- Update the local food directory.

Discrete 'next steps' that link with the above priorities and that will be delivered by the Isles of Scilly Local Produce Market Community Interest Company (CIC) and Transition Scilly included the organization of:

- trade fair in early 2011
- electronic marketplace
- follow-up meeting of the workshop participants.

2. Workshop Aims

The workshop aimed to:

- Review the work that has already been done on local food in Scilly;
- Establish the policy and strategic context for future local food initiatives;
- Identify the achievements on which one can build, the challenges that need to be addressed, and the untapped potential in Scilly;
- Identify possible local food solutions for Scilly (possibly informed by success stories in other parts of the UK)

3. Workshop Participants

There were 23 workshop participants, most of who mange or work for a food related business.

- **Organisations and Groups:** Isles of Scilly AONB Unit (Trevor Kirk, Rebecca Steggles), Duchy of Cornwall (Chris Gregory), Isles of Scilly Local Action Group (Kaydee Torbet), Transition Scilly (Jonathan Smith, Nick Lishman), Isles of Scilly Local Produce Market Community Interest Company (Alison Guy, Mark Praeger)
- **Producers:** Alison Guy (Longstone Farm, St Mary's), Jonathan Smith (Scilly Organics, St Martin's), Ben & Johann Hicks (Tamarisk Farm, St Agnes), Sue Hicks (Troytown Farm, St Agnes), Zoe Julian (Churchtown Farm, St Martin's), Mark Praeger (Ales of Scilly, St Mary's), Andrew May (Mainland Marketing)
- **Hotels, Restaurants and Cafés:** Ramsey Halbous (St Mary's Golf Club), Wayne Shaw (Island Hotel, Tresco), Philip Callan (Hell Bay Hotel, Bryher), Pete Marshall (New Inn, Tresco), Tristan Hick (Coastguards Café, St Agnes), Mark Eberlein (Hightide Restaurant, St Agnes), Adam Morton (Adam's Fish & Chips, St Martin's), Nick Lishman (Mincarlo Guesthouse, St Mary's)
- **Shops:** Zoe Dan (Bryher), Kate Moore (Tresco Stores)
- **Workshop Facilitator:** Joy Carey

4. Workshop Format

The workshop comprised six main sections:

- 4.1 A review of previous local food initiatives in Scilly and the achievements to date, including the Isles of Scilly Local Produce Market Community Interest Company, Scilly Local Food directories (2004 and 2007), on-line map of local producers and the Scilly Food Festival 2010.
- 4.2 An overview of the current context for local food production, processing, sale and consumption. The policy context and strategic direction of local food initiatives in Scilly were defined, including the opportunities and challenges emerging from the *Capacity for Change in Farms on the Isles of Scilly*, *Isles of Scilly Local Action Group (LAG) Local Development Strategy*, Environmental Stewardship (including Scilly-specific options within Higher Level Stewardship) and the Isles of Scilly AONB Management Plan 2010-2014.
- 4.3 A summary report on the results of producer and buyer local food surveys that were completed in advance of the workshop.

- 4.4 A short presentation by Joy Carey on initiatives in other parts of the UK that might provide useful ideas and lessons for Scilly.
- 4.5 A discussion to review what the main obstacles are to producing and selling more food locally, what issues need to be addressed and what untapped potential/opportunities there are that could help increase local supply
- 4.6 A discussion of possible solutions and priority next steps

5. Opportunities and Challenges

5.1 Workshop discussion

Key themes included:

- Lack of confidence in Scilly residents' commitment to regularly buying local food
- Perception that local is more expensive than food bought in. This may not be the case in reality, if freight costs are separated out.
- Lack of clarity on what 'local' means.
- Lack of information on availability of produce

5.2 Buyer survey comments

Availability	Distribution
Consistency of supply is a perceived weakness in the local supply chain	In the first instance, local food needs promotion
Buyers lack information on various issues including the volume, range and seasonality of produce available	A centralized convenient approach to selling would help with availability and needs coordinating
Buyers favour a central retail outlet for local produce	Need transport of food products to and from the off-islands
	Need transport to local shops and to people's homes

(A full summary of the survey results is presented in Appendix A.)

6. Increasing Supply of Local Food

6.1 Workshop discussion

The workshop discussion considered three questions in relation to four main food types – meat, eggs, fish and shellfish, fruit and vegetables (not each food type was fully discussed due to time limitations):

- What already works well?
- What are the current obstacles?
- How can we overcome these obstacles; is there untapped potential?

6.1.1 Meat

6.1.1.1 What already works well?

- Own farm production (St Agnes, Tresco, St Mary's) and sales to visitor markets e.g. camp site close to farm
- Improved and successful efforts of caterers to use the whole carcass on Tresco, using Tresco meat
- Chef is saving money by making burgers himself from Tresco meat

6.1.1.2 Current obstacles to increasing meat supply:

- Absence of vital infrastructure – abattoir & cutting facilities for meat
- Costs of livestock transportation, freight charges and labour costs make it expensive to sell local meat.
- Hygiene regulations and impact on processing costs
- Uncertainty about the market
- Challenge of finding markets for all the cuts of meat
- The need for a fair price for mince, burgers, sausages (also an untapped potential)
- Balancing supply and demand across the whole year (relevant to all produce)
- Currently no method of distribution

6.1.1.3 Untapped potential for meat supply

- Supply school and hospital with cheaper cuts e.g. mince, burgers, sausages
- Education of chefs in using cheaper cuts
- Doing a price comparison - compare actual prices: local versus supermarket
- Explore potential for supply to Five Island School and St Mary's hospital

6.1.2. Eggs

6.1.2.1 Current obstacles to increased local egg sales

- Lack of loyalty from buyers (caterers in particular)
- Wasted eggs on St Agnes i.e. wasted supply, caterer at the last minute dropping out of supply agreement

- Convenience of buying in from mainland because not a highly perishable item

6.1.3. Fish and Shellfish

6.1.3.1 Current obstacles to increased local fish & shellfish sales

- 90% goes to the mainland, especially shellfish
- Perception of cost
- Disinclination of people to prepare fish for themselves.
- Market too small

6.1.3.2 Current obstacles to increased supply of local fish & shellfish

- Preparation e.g. picked white crab meat very time consuming and has specific hygiene requirements
- Rules and food hygiene regulations which increase costs
- Conservationists or quota restrictions; more rules and regulations.

6.1.4. Fruit and Vegetables

6.1.4.1 Current obstacles to increasing local sales of fruit & vegetables

- Distribution
- Lack of local loyal buyers
- Perception of higher cost

6.1.4.2 Current obstacles to increased production of fruit & vegetables

- Labour and availability of land,
- Fertility - raising organic matter levels to sustain higher yields
Water - lack of water for irrigation in summer months

6.2 Untapped potential – relevant to all food products

6.2.1 Clarify local markets and specific opportunity

- Over 2000 people living on Scilly so a good size potential market all year round.
- Identify the largest food buyers on the islands
- B&B's – could serve more local products
- Work with the existing shops on the off-islands
- Producers need to think about how to target different products at different customers e.g. different cuts of meat, varying grades of fresh produce

6.2.2 Make use of existing structures and events

- The Local Produce market that already exists but is underused
- The 'five mile food' concept and the Scilly food festival
- Build in local food with other big events that happen e.g. Walk Scilly, World Gig Championships, Art Scilly.

6.2.3 Build on existing strengths

- Identify what Scilly already does well and can produce
- Huge demand for local fish
- Add more value to products that are unique to Scilly e.g. the Scilly pasty (though this has already tried; very labour intensive)
- Making use of the Scilly identity for marketing, possibly a Scilly brand
- Flower production generates income so there is potential to combine flowers and food to help make a horticulture business more viable.

6.3 Survey comments: summary of solutions

Infrastructure & resources	Communication and planning
Abattoir to enable more local meats to be produced without the extra cost of transport to and from mainland	Mechanism for coordinated production to meet demand, deal with continuity of supply and avoid duplication based on a consultation between producers and buyers.
Better outlets; a local produce shop owned by a producer co-op	Communication between growers and consumers
Freeing up disused land for people that want to start growing food.	More working together of external bodies with producers
Incentives & support for small producers (e.g. lower rents & rates)	

Summary of comments from buyers

- Local food supply is a pressing issue
- Local food supply has lots of benefits
- Local produce needs to be promoted
- Need a coordinated plan to increase supply of a small range of widely used products

(A full summary of the survey results is presented in Appendix A.)

7. Ideas & Solutions

- A Scilly food business 'trade fair' to help connect buyers and producers at the start of the season
- Exchange of information – who is doing what; who wants what; and when?
- Quantify what local produce is available, when and where from
- Develop a central 'market place' database to help match supply and demand
- A central facility – local produce shop on St Mary's
- A box scheme home delivery

8. High Priority Actions

8.1 Scilly producer forum to help improve communication and co-operation

8.2 Quantify what local produce is available – could be part of the work on updating the local food directory.

8.3 Update food directory - explore more cost effective ways of producing a food directory

9. Next Steps

9.1 Scilly 'trade fair' for buyers and producers to meet and exchange information on supply and demand in February 2011; link this in with the Local Produce market

Action: Local Produce Market CIC and Transition Scilly to organize

9.2 An updatable electronic 'marketplace' system to help communicate what products are available and when, in what volumes

- Could be simple group email
- Could use existing websites
- Might need one person to help coordinate

Action: Transition Scilly offered to look at potential to set up a space for this on their website. To be discussed at next meeting

9.3 Follow-up meeting to plan the fair and the electronic marketplace system.

Action: Local Produce Market CIC & Transition Scilly to organize in meeting by early 2011.

10. Questions to Explore

10.1 A local food shop on St Mary’s – would it be viable?

Could community investment and ownership be a solution? Could it help to raise the 30-50% match funding required by LAG?

10.2 What funding opportunities exist? What could the Local Action Group help to support?

10.3 Education, community engagement and local food promotion activities - is there education funding that could be used to progress work on the festival, the five mile food concept and work with schools that could also include some kind of food buying arrangements?

10.4 Engaging with the Co-op - is there a role for the Co-op in stocking and delivering local produce? Could Scilly join with other island communities to have this conversation with the Co-op?

11. Post-workshop additional comments: untapped potential for meat production

Increasing beef supply:	
An abattoir and meat processing facility would obviously be hugely beneficial to livestock producers in the islands re: freight costs animal welfare and having an all year round use providing continuity of the product. Eg from the end of October to early April there is no Tresco beef available unless it is frozen.	Increasing the beef herd needs to be in slow, in line with the need to produce enough forage to maintain the herd.
Marketing messages, Scilly ‘USP’, branding:	
Much of the imported beef has been is corn-fed. We need to convince the customer that Scilly product is of a better quality even though it costs a bit more. Eg Tresco Beef is purely grass-fed, although not certified organic. Grass fed beef produces more omega 3 fatty acids than corn fed beef therefore is healthier.	Branding is a good idea - the ‘Tresco Beef’ brand is working well so far. However, it takes time to become established and it is important to maintain high standards.
Distribution and marketing options	
A box delivery system could work well in Scilly and would encourage people to buy local produce if it was delivered to their door.	The information on the Scottish Islands and how they manage things is interesting and some of it maybe could be implemented in Scilly.

12. Case Studies: UK Models and Solutions

Other local food initiatives across the UK can provide valuable information and experience to Scilly.

12.1. Mull & Iona Community Trust

- Saved its struggling abattoir, now owned by a producer coop
- Established a community enterprise butchers shop with cutting & packing facilities
- Now employ a full-time slaughterman
- Used by local producers for packing & labelling for wholesale
- Exploring links into wider Argyll food promotion, appropriate scale for a local food network <http://www.mict.co.uk/>



12.2 Sustainable Uist



- Expanded Horticultural research – with a crop trials site on the Island of Benbecula (looking at soil fertility, wind protection, and extending the growing season)
- A Crofting course available at the local school
- Consultation on a community owned farm shop (with producers & customers)
- http://www.sustainableuist.org.uk/page_2000198.html

12.3. Bute community garden

- 6 acre site gifted by a local trust
- Located by a school
- Provides an 'outdoor classroom'
- Providing horticulture training
- Providing food for the community
- A social enterprise

<http://www.ruralgateway.org.uk/en/node/336>



12.4. Islay Community Garden and Shop

Originally the kitchen garden of Islay House, the garden was leased to the community in 2005. It is now run by volunteers and seasonal produce is sold through a little shop on site. The local paper lets people know what is available each week. The garden is open to visitors throughout the year.

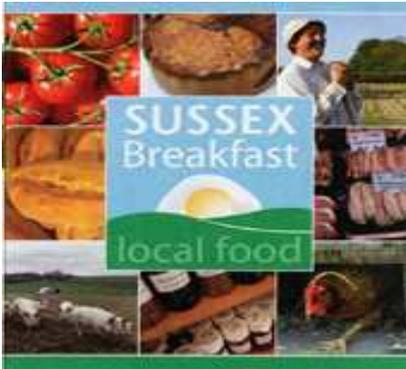
http://www.islayinfo.com/islay_house_community_garden.html



12.5. The Sussex Breakfast

An initiative designed to build stronger links between accommodation providers and local food producers

A Sussex Breakfast is at least 60% of local, seasonal ingredients sourced from Sussex farms using traditional, natural methods with high animal welfare standards. It includes Sussex grown apple juice rather than orange juice. Where it makes sense due to location, seasonality and food miles, food from the neighbouring counties of Kent, Hampshire and Surrey is acceptable. The project is supported by 'A Taste of Sussex' and the Netherfield Centre for Sustainable Food and Farming. http://www.thenetherfieldcentre.co.uk/sussex_breakfast.htm



12.6. The Real Island Food Company, the Isle of Wight

An on-line shop for local, seasonal food set up in 2007

"We're your local butcher, baker, fishmonger, greengrocer, deli and grocer all rolled into one. We source from the best local suppliers so you are assured of fresh, tasty food. To make it even better we do the hard work and deliver it right to your door. We deliver Island-wide every week and can arrange mail order shipments across the UK."

<http://www.realislandfood.co.uk/index.asp?>

12.7. Skye & Lochalsh food link

It started with a food directory and a food festival. But more work was needed to get Skye produce to local people and into the pubs, restaurants, hotels and cafes. A mobile demonstration kitchen that could be packed up into a van proved very successful in providing educational taste and see events and helping to engage people. The horticultural producers worked together to organise a farmer's market stall in Portree and also to coordinate production between them. Distribution was the biggest barrier to making any real change. A volunteer offered a van and his time as a driver to help, and now the Skye 'Taste Local' distribution van collects from 26 producers and supplies over 60 local shops, cafes and restaurants.



<http://www.tastelocal.co.uk/skye/foodlink/index.html>

The Taste Local website provides a wide range of information including the list of producers.

For further local food initiative examples from Scottish Island communities see www.sac.ac.uk/mainrep/pdfs/foodnetworksguide.pdf

APPENDIX A: Survey Results

Summary of buyer survey results (October-November 2010)

Buyers:

- 15 respondents
- 14 buy locally sourced products
- Average spend between £6-200 per month
- 85% buy for personal consumption
- One café, one hotel and one shop buy local produce.

What types of produce?

Vegetables – 13 (92.9%) 93%

Eggs – 12 (85.7%) 86%

Fruit – 8 (57.1%) 57%

Fish dairy – 6 (42.9%) 42%

Dairy – 6 (42.9%) 42%

Shellfish – 5 (35.7%) 36%

Beef – 3 (21.4%) 21%

Pork – 2 (14.3%) 14%

What are the main limitations to buying locally sourced produce?

Supply through the year; range; volume; central place to buy; information on what is available

- Consistency of supply, seasonal limitations
- Non-availability of certain products (tomatoes, mushrooms, fruit)
- Limited volumes - not enough to sell to a lot of customers
- More available on the off-islands than on St Mary's
- No central place to buy on a regular basis and that is convenient for people
- Cost
- Knowing what is available, when and where to find it

What would enable more local food to be produced on the islands?

1. Economic viability

- It needs to be an economically viable proposition
- More people producing food rather than flowers
- Incentives & support for small producers (e.g. lower rents & rates)

2. Infrastructure & resources

- Abattoir to enable more local meat to be produced without the extra cost of transport to and from mainland

- Better outlets; a local produce shop owned by a producer co-op
- Freeing up disused land for people that want to start growing food

3. Communication and planning

- Mechanism for coordinated production to meet demand, deal with continuity of supply and avoid duplication based on a consultation between producers and buyers.
- Communication between growers and consumers
- More working together of external bodies with producers

Is distribution a problem, if so how can it be improved?

Need promotion and a centralized convenient approach to selling

- More an issue of improved promotion and a more centrally-located visible and convenient local produce outlet that is well maintained and close to the main shops.
- Need a more centralized approach to selling local produce to help increase demand.
- Local food is not always advertised so buyers do not know what is available and where
- Arrangements for delivery of eggs and dairy to St Mary's could be improved

Distribution needs coordinating; transport to and from the off-islands; to local shops and to people's homes

- Need improved transport between the islands to make it easier for off-island growers to get produce to St Mary's
- People are busy so a home delivery service would help. The Co-op offers a free delivery service.
- Need to encourage local shops to stock local produce
- Maybe set up a box scheme

What other local produce would you like to be able to buy?

Most common responses: meat (6 out of 12); cheese, fish, fruit & vegetables (4); poultry (3)

- Cheese; a particular request for goats cheese
- Fish & seafood
- Fruit & vegetables
- Honey
- Grains & cereals
- Poultry
- Lamb
- Real bread
- Apple juice
- Eggs

Is there much demand /interest from locals or visitors?

More from visitors than locals

Local ingredients in breakfasts are very popular

Other comments

It is a pressing issue; lots of benefits; local produce needs to be promoted; need a coordinated plan to increase supply of a small range of widely used products

Lots of benefits:

- It is a pleasure.
- It is good to support local producers.
- Great to know where it comes from.
- Tastes great.
- So much better than imported food.
- Low food miles.

Need to promote local food availability.

- Need more information about what is available, where and when to buy it.
- **I**t needs to be as easy as possible for the general consumer to buy it.
- Local restaurants and shops need to be encouraged to buy local.
- Public awareness of what is available and where (with information on exactly where it was grown) is key.
- Easy to buy in the summer when visiting the off-islands.

Need a plan to increase supply:

It would be wise to pick a small range of widely used products, which would give economies of scale, and concentrate on production to meet demand.

Summary of producer survey results (3 respondents)

Amount of land (acres) farmed (in total for all 3 respondents):

Grassland: 920 (1 producer)

Arable/fodder: 0

Horticultural: 4 (1 producer)

Farms with livestock:

Beef cows – 1 (small herd)

Number of employees

Shellfish 3-4

Horticulture 1-2

Meat 4+

Proportion of sales through different markets (farm gate the highest)

Farm gate – two (80% horticulture and 1% shellfish)

Local cafés, pubs – two (5% horticulture and 1% shellfish)

Restaurants – one (5% horticulture)

Mainland – two (98% fish/shellfish and 10% horticulture)

Interest in expanding sales on the Isles of Scilly

Fish/shellfish – currently selling, no plans to expand

Beef – currently selling, no plans to expand

Horticulture – currently selling but would like to expand

Main barriers to selling on the Isles of Scilly

i) Meat:

- Currently no method of distribution and uncertainty about the market
- Need to promote the integration of landscape and habitat management and local food production
- Need to find a way to make future conservation grazing more self sustaining through developing beef market

ii) Fish and Seafood

- Rules and regulations, undoubtedly.
- Disinclination to prepare fish for themselves.
- Market too small.

iii) Horticulture

- Distribution - can be problematic when relying on inter-island freight. Costly, lack of punctuality, inflexibility
- Lack of local loyal buyers - few really recognise the true value of local food and are prepared to pay a fair price and remain loyal
- Perception of cost - some people assume that local food will be more expensive, without even comparing prices

What are the main barriers to producing more food from your land?

i) Meat

- No abattoir

ii) Fish & seafood

- Weather.
- Other fishermen (including unlicensed 'hobby' people catching and selling shellfish) who work the same area.
- Potentially: more conservation or quota restrictions; more rules and regulations generally.

iii) Horticulture

- Labour - availability and cost
- Land - quality and quantity
- Fertility - raising organic matter levels to sustain higher yields
- Water - lack of water for irrigation in summer months

Most businesses in Scilly experience extreme seasonality due to the nature of the tourist industry. Do you make significant sales outside of the tourist season (e.g. to local people)?

- Meat: n/a
- Shellfish: Shellfish commands a higher price outside the tourist season as it coincides with poorer weather/lower catches generally in UK
- Fruit & vegetables: No, most sales are June, July and August

Other comments

- Most lobster sold in UK outlets (e.g. supermarkets) is brought in from overseas, commonly USA or Canada: this is unhelpful to UK shellfishermen.
- Most regulations seem to be the same for tiny producers and large operators; this makes life difficult and expensive for small producers.
- There is too much red tape being administered by people with too little knowledge of the subject they are regulating.
- A holistic local food strategy will be very useful in trying to advance the local food sector here on the Islands.