Cornwall & Isles of Scilly

# Agrifood Strategy and Action Plan

Delivering the nation's No. 1 green and fair food economy

2025 – 2035


# Foreword

The agrifood sector in Cornwall and the Isles of Scilly is one of the most important foundations of our local economy. It provides 20% of the jobs, and a quarter of all Cornish businesses. Over the years, we have demonstrated a huge amount of innovation and entrepreneurship which has led to Cornish produce being recognised as a premium product at home and abroad. This success has been achieved by hard work, and strong collaborations. As this strategy makes clear however, we cannot afford to rest on our laurels. The world is changing fast, and we must adapt and change with it.

Changing consumer preferences and expectations, the need to improve the nation's health and wellbeing, promote greater food security, and the need to combat climate change and achieve environmental sustainability are powerful forces taking us forward into a new era. We must plan ahead for these changes and ensure we remain at the forefront of the UK's agrifood sector.

Our ambition is to be the UK's number 1 region for sustainable food and drink and this strategy sets out the path ahead if we are to realise this ambition. It is a bold and imaginative strategy which I am sure will command a broad degree of support right across our communities. The strategies outlined here are fully compatible with the Government's own agenda of securing greater economic growth and its new approach to industrial policy.

An active partnership between industry and Government can unlock enormous new opportunities for the agrifood sector. We must take full advantage of the incredible economic opportunities that lie ahead of us to support the continued growth of the Cornish agrifood sector. The abundance of clean energy off our coastline, investment in skills for our workforce, the construction of new affordable homes can all contribute to meeting the needs of the sector in the decades ahead.

The Cornwall and Isles of Scilly Economic Forum will do all that it can to foster this new spirit of collaboration, harnessing all of the tools at our disposal to ensure that these bold and ambitious plans become embedded in action at every level.

**John Hutton**
Chair, Cornwall and Isles of Scilly Economic Forum

# Introduction

It is over 20 years since Cornwall produced a strategy for the economic development of its agrifood sector. In that time, much has changed and the world's food systems now pivot towards cleaner, greener, fairer production methods and supply chains that minimise environmental harm and improve access to nutritious, affordable food.

However, recent major global events have emphasised the fragility of the world's food supply. Conflict, infectious disease (in humans, plants and animals) and environmental disasters have at various times all led to severe – sometimes sudden – breakdown in supply and consequent shortages and price shocks. These have highlighted the urgent need for genuine and sustainable transformation and for our food systems to be more secure and resilient as well as greener, cleaner and fairer.

**Recent global events have highlighted the need for genuine and sustainable transformation and for our food systems to be more secure and resilient as well as greener, cleaner and fairer.**

The challenges are complex and enormous. Food is part of many aspects of our lives, our communities, our economy and our environment, with varied and often competing priorities and demands. However, this should not be an excuse for inertia or for not seeking out the best resolutions, even if they are difficult or results will not be instantaneous.

In every challenge there is also opportunity and, because of its specific strengths and USPs in agrifood (defined here as food, drink, farming and fishing), Cornwall and the Isles of Scilly (CIoS), along with their partners in the wider South West region, are well positioned to capture these opportunities and make a significant contribution to a number of development priorities identified by both local and national government, including

– economic growth and improved productivity;

– environmental sustainability and regeneration;

– the CIoS aim of becoming the nation's first net zero economy by 2030;

– improved health and wellbeing and reduced inequality;

– digital, technological and scientific transformation;

– the sustainability of CIoS tourism;

– a reduction in skills shortages and improved career opportunities;

– enhanced food security locally, regionally, nationally and internationally.

CIoS agrifood has undoubtedly evolved strongly over the past twenty-five years or so to become one of the nation's major reputational food and drink success stories. In 2000, Cornwall did not harvest the salt from the ocean that surrounds the peninsula or have a tea plantation. Neither was there a recognised Cornish brand of eggs distributed beyond Cornwall or a successful plant-based milk-chocolate-equivalent market leader. Yarg was the only Cornish cheese well-known beyond the Tamar and it was not possible to buy Cornish milk in a supermarket (or at least not identifiable as such). Distilleries were virtually non-existent; a very young vineyard was taking shape in the Camel Valley; cider production was about to begin at Cornish Orchards near Liskeard; a chap called Bill Sharp was running a microbrewery near Rock and the Cornish pasty, on which thousands of local, full time permanent, year-round jobs depend, had no recognition of its distinctiveness and could be made anywhere and to any recipe.

**Evolution, innovation and diversification that maximise the value of those existing supply chains is much less risky and less costly than introducing new production categories or developing entirely new markets.**

There were also very few links between food and drink producers and the hospitality sector. Where the hospitality sector did use local suppliers, such as wholesale butchers, greengrocers or dairies, they often would have been buying products that had not been sourced locally.

On the whole, farming techniques in CIoS were (and always have been) non-intensive but, beyond the organic sector, there was little urgency to reduce detrimental environmental impact, enhance biodiversity, or focus beyond production for mainstream markets.

Since then, CIoS has reshaped itself into a high-ranking food destination and a leader in regenerative farming. However:

– Red meat and dairy production still dominate agriculture while alternative proteins, now the focus of global innovation, are under-developed.

– Fishing is a highly productive and successful part of the sector but still exports most of its catch to countries where the many different species of fish are better understood and valued.

– The vast majority of horticulture is still focussed on the production of high volumes of a relatively narrow range of low unit value vegetables.

– Food processing is still Cornwall's largest manufacturing industry but, outside of the processing of primary produce such as milk and seafood, production of any scale remains driven mainly by the popularity of the Cornish pasty – now the UK's largest and most widely recognised product with Geographic Indication status [1].

There are good reasons for this. CIoS has developed specialisms for the types and methods of production that climatically, geographically and historically have worked well here and for which robust infrastructure and supply chains are therefore in place, making high volume production viable. Evolution, innovation and diversification that maximise the value of those existing supply chains is much less risky and less costly than introducing new production categories or developing entirely new markets.

Therefore, while newer entrants have made a major contribution to the variety, strength, reputation and value of Cornish food and drink over that time, many have had to develop their own supply chain. Doing so from a geographically remote part of the country will be part of the reason why productivity gains in the sector have not been as great proportionally as the volume or reputational gains.

[1] Brand Dialogue (2019), British GI Brands, A report on the perception of geographical indication brands in the UK

# Contents

# Current State of Play

Agrifood is a vast sector covering many different trades and disciplines and a complex supply chain. Food is the largest manufacturing sector both locally and nationally; it accounts for GVA of over £28bn and 17% of all UK manufacturing [3], which is larger than automotive and aerospace combined. It is one of the largest employers in every geographic region. Food manufacturing alone employs nearly 400,000 people.

## £2bn

**The CIOS agrifood sector is worth about £2bn**

The food industry is also a vital collaborator in shaping positive transformation: helping to deliver net zero, protect and regenerate natural capital, improve mental and physical health and wellbeing, and enhance food security.

Furthermore, it is also a key partner in, and customer of, other growth-driving sectors identified in the government's draft Modern Industrial Strategy, such as advanced manufacturing, clean energy industries, digital, technologies and life sciences. It is therefore an essential cog in the wheel of circular and productive economic growth in the UK.

Within Cornwall Council's Good Growth Plan 2025-2035, agrifood is justifiably defined as one of the CIoS core sectors. It generates over 10% of total CIoS GVA, which is more than twice the national average; accounts for 1 in 5 jobs and a quarter of all business enterprises [3].

It links inextricably to other core sectors such as the visitor economy and it can help resolve some of the persistent challenges within foundational sectors such as health and education, while the newer distinctive sectors offer agrifood the opportunity to drive clean growth and deliver productivity improvements.

The economic significance of agrifood in CIoS has grown from its powerful cocktail of assets, some of which are linked to the natural environment while others are the result of strategic 21st century planning and investment:

[2] https://iuk-business-connect.org.uk/agrifood/food

[3] Cornwall Council, 2024, Cornwall & Isles of Scilly Agri-food Sector Summary

# Unique

**The emerging sectors such as renewable energy, tech metals and satellite communications also owe their existence to Cornwall's unique combination of geology, geography and climate.**

## A Unique Environment

About 80% of land in CIoS is in agricultural use. The geography, featuring predominantly hills, valleys, moorland and exposed coastal landscape, has not favoured the creation of monocultures.

A diverse fishery, which includes a wide range of catch methods from all sizes of vessel, lands a wider variety of seafood in Newlyn than is found at any other UK port.

Since highly intensive farming and fishing methods have never really prevailed here, biodiversity enhancements and environmental improvements to the CIoS landscape and ocean can be made more swiftly and more easily than in environments that have become more seriously degraded through over-production.

Agrifood is delivering biodiversity net gain and landscape and ocean recovery, providing nature-based solutions to reversing biodiversity loss, improving water storage, preventing flooding, sequestering carbon and reducing pollution.

This makes CIoS well placed to meet the growing demand for (and to promote) diets that include produce from sustainable/regenerative production methods, such as 'less but better' red meat and dairy products and a wider variety and volume of fish, seafood and vegetables.

The CIoS climate is more favourable to food production compared to many other parts of the UK, with a longer growing season, generous rainfall and a number of micro-climates aiding the productivity and quality of milk, pasture-fed beef and lamb, and horticultural produce, some of which, such as new potatoes, benefit from early season 'first to market' premiums.

The conscientious management of the land and sea also makes them attractive to visitors, enhancing the experience and providing reasons to return on a regular basis, sometimes several times a year. Visitors to CIoS consistently rate local food and drink very highly, which also encourages them to seek out Cornish and Scillonian produce after their return home, extending the market opportunity for CIoS producers to sell online direct to the end consumer, or via wholesale to other parts of the country.

The emerging sectors such as renewable energy, tech metals and satellite communications also owe their existence to Cornwall's unique combination of geology, geography and climate. Progressive collaborative developments between these sectors and agrifood are already being explored and have huge potential to produce mutually beneficial solutions towards the CIoS Good Growth aspiration.

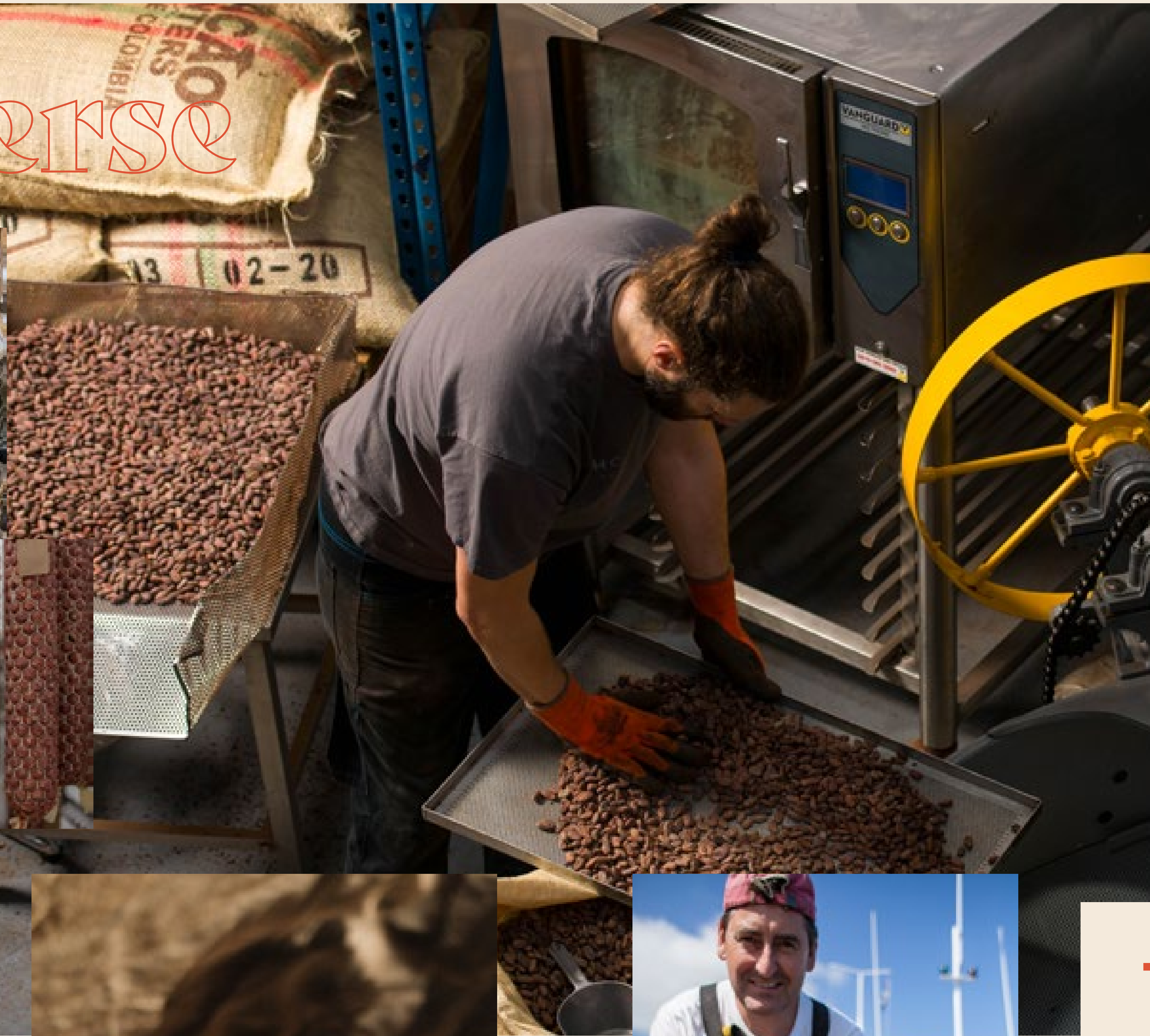
**80%**

**About 80% of land in CIoS is used for agriculture**

# positive and conscientious management

Positive and conscientious management of the land and sea makes them attractive to visitors, enhancing the visitor experience and providing reasons to return on a regular basis, sometimes several times a year.

# Diverse



## Diverse Range of Products

While production gaps remain (notably fruit), few, if any, individual areas of the UK yield the diversity of food and drink produced and landed in CIoS.

Strategic investment programmes have been a major motivator and enabler of this diversification, identifying and capturing opportunities to broaden production, add value to primary produce and develop market potential.

## Strong Image and Reputation

Two thirds of the UK's population are said to identify positively with products that use Cornwall/Cornish names and/or branding. They are associated with wholesomeness, quality, a clean and attractive environment and happy holiday memories.

Cornwall's peninsula status and remoteness make it distinctive in many people's minds, offsetting to some degree the difficulties associated with the relative distance from major markets by improving a product's popularity and enabling many to attract a premium. The same applies to Scillonian produce, possibly to an even greater degree.

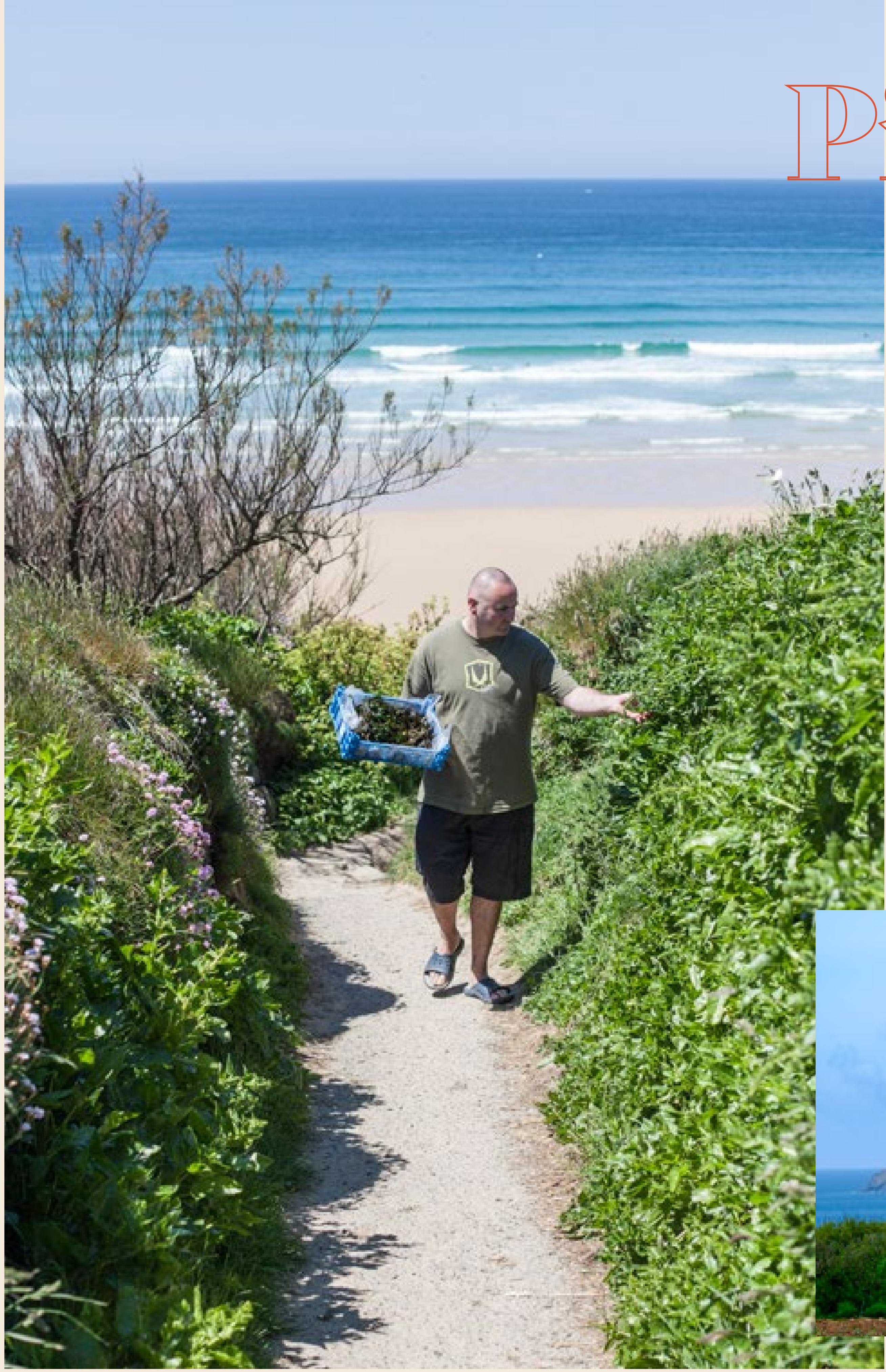
In the 2000s, CIoS agrifood benefitted from strategic investment programmes that provided financial support for both revenue and capital projects. This combination played a critical role in transforming CIoS agrifood, ensuring strategic and collective sector-specific promotion, market development, data and analytics, skills development and business support could contribute to overall standards, reduce risks and improve returns on the capital investments.

These characteristics and developments have led to CIoS becoming one of the UK's top food and drink destinations, with the food and drink experience reinforcing its popularity as a tourist destination. This is both a massive asset and a challenge. Tourism creates a temporary additional population of 69,000 mouths to feed [4], the largest seasonal influx of any area in England, and a market on which many CIoS food producers, retailers and hospitality businesses depend. However, the temporary nature of that influx means that most of those businesses need to manage large seasonal swings in demand, impacting profitability, staff retention, etc.

**2 in 3**

**of the UK's population are said to identify positively with products that use Cornwall/Cornish names and/or branding**


[4] Smart Growth Analytics, 2025, The True Value of Tourism in Cornwall – A Strategic, Economic & Social Analysis of the UK's Leading Tourism Economy



# Pioneering

## Pioneering and Collaborative Spirit

Perhaps because of its peripherality, attracting and fostering entrepreneurs and innovation is in the CIoS DNA. This helps to offset the commercial disadvantages of that peripherality.

For example, CIoS is ahead of the game in pioneering circularity in agrifood to reduce waste, input costs, the use of virgin materials and improving productivity. Initiatives such as gleaning [5] (gathering and repurposing outgrades or excess crops and other foods) are delivering indirect economic and health/wellbeing benefits in the community by redistributing nutritious fresh food that would otherwise go to waste, while slurry waste from dairy farming is being used to generate biomethane to power tractors [6].

Volunteering is more prevalent in Cornwall than any other part of the country and this is evident within agrifood, where there are some remarkable innovative community growing and learning schemes based around food.

**Attracting and fostering entrepreneurs and innovation is in the CIoS DNA**

[5] https://gleaningcornwall.org.uk
[6] https://bennamann.com

# The Ambition.

By harnessing their assets and with the right strategic drivers, the peninsula and the islands have the capacity to move faster and more nimbly than other parts of the country towards a contemporary food economy; one that acknowledges but also evolves its food heritage, developing the scope, methods and volume of production and distribution for **CIoS to become the UK's No. 1 region for food and drink that:**

## 1.

**improves resilience and food security;**

## 2.

**generates environmental and economic growth; and**

## 3.

**increases the life chances of its people.**

This strategy and action plan provides the framework for a comprehensive, co-designed, focused development programme for achieving the CIoS agrifood ambition.

# Strategic Priorities

The whole of food, drink, farming and fishing is vast and a strategy for the sector could easily become either unwieldy or far too generic. However, it is important to avoid the temptation to compartmentalise the thinking and miss the chance to be creative in building productive and cost-effective cohesion between the different parts of the sector and between agrifood and other sectors.

Therefore, while this is primarily an economic strategy, the following development priorities for CIoS agrifood have been devised with those wider goals in mind - delivering economic growth that also enhances food security, achieves net zero and improves opportunity:

**1.**

**Transitioning to a resilient and sustainable food supply chain.**

**2.**

**Sorting out skills.**

**3.**

**Fostering growth.**

**4.**

**Fixing the foundations.**

# 1.

## Transitioning to a resilient and sustainable food supply chain

Addressing sustainability and food security in their broadest sense go hand in hand. And while it is easy to get caught up in definitions and semantics, any food system that is in danger of not being able to feed its people – for whatever reason – or causes net environmental degradation, is neither sustainable nor secure, nor economically viable long term.

On the other hand, food security and environmental gains cannot be achieved unless food production is economically resilient. To be successful, any transition therefore needs to consider the sustainability of production, the environment and the economy as inextricably linked. This means, for example, making genuine environmental sustainability and renewal an unequivocal commercially competitive choice rather than just the 'right thing to do' for conscientious businesses or a greenwashing opportunity for those who see it purely as a marketing opportunity. The ambition cannot become optional as soon as other pressures mount.

Larger buyers are moving swiftly towards making environmental audits and demonstrable environmental good practice and improvements mandatory for suppliers. It is likely that legislation will follow, with all agrifood businesses at some point expected to be able to measure and reduce their impact on the environment. It therefore makes absolute sense for all parts of food production to be well prepared for, and preferably ahead of, this requirement.

To do so, businesses need to be able to navigate the often confusing and conflicting information about environmental sustainability and to access benchmark metrics on which to base performance improvements, e.g. emissions, carbon capture, biodiversity net gain and circularity. For smaller businesses in particular this is not at all straightforward. An even greater challenge is identifying and evaluating the most effective potential solutions and mitigations from a plethora of fast-moving technologies with different pros and cons. Price volatility, and in particular an expectation that costs will reduce as technologies advance, creates an understandable reluctance to be among the first to invest without some form of subsidy or incentive.

As the CIoS agrifood sector consists of many small and few large businesses, specialist guidance that overcomes these hurdles could channel multiple SMEs collectively towards environmental growth and accelerate CIoS progress towards net zero.

**Expectation that costs will reduce as technologies advance, creates an understandable reluctance to be among the first to invest without some form of subsidy or incentive.**

The UK needs to farm, grow, catch and harvest a greater variety of food to reduce the nation's dependence on imports from countries where the indigenous population is undernourished or those (including countries within Europe) that are increasingly subject to the impacts of climate change, whether sudden and severe, such as drought, storms, flooding or forest fires, or more gradual such as erosion or changes in weather, temperature and seasonal patterns.

**We export over 70% of seafood landed by UK fishing while importing over 1m tonnes of the species we prefer to eat...**

Improving the security of our own food supply also reduces the environmental impact of the food industry, including current trends such as exporting over 70% of the seafood landed by UK fishing while importing over 1m tonnes of the species we prefer to eat - salmon, tuna and cod. Food manufacturing could also deliver marked improvements in food security by expanding collaboration with UK farming and fishing and, working with the major retailers, increasing consumer demand for UK produced ingredients over imports.

CIoS is well placed to help meet this demand due to its relative strength in primary food production. However, despite the latest UK food security index [7] painting a broadly stable picture of food supply, currently there are a great many disincentives to primary food production and the trajectory of falling production detailed in Defra's latest annual report on UK agriculture [8] does not leave the nation in a good position to grow its food supply base.

It is therefore essential that the sustainability and development of these domestic food supply chains is incorporated into the new UK Food Strategy promised for 2025. CIoS collectively, and both Cornwall and the Isles of Scilly separately, with their well-connected food economies, could be regarded as useful pilots on which to model this type of development.

It is possible the sector would benefit from physical resources to aid this mission. For example, next generation transport/consolidation/distribution hub(s)* that use state-of-the-art technology could lead to revolutionary change for many operators and could provide useful catalysts for connectivity, productivity improvements and efficiencies as well as environmental gains up and down the supply chain. Currently much of the food produced and distributed locally involves many small volume drops to remote places, which not only hampers productivity but also negates much of the assumed environmental benefit associated with reducing food miles.

To date, while the issue has been acknowledged, workable forms of shared distribution have proved difficult. The potential environmental and cost savings from improved distribution make it a key factor in enabling CIoS to reach its net zero goal and would also make it easier to attract private sector investment into the sector. The value of investments such as this would be amplified by interventions that encourage individual businesses to, for example, scale up production or improve their digital capacity in order to make effective use of these technologically advanced resources.

*Hubs are just an example and it is not suggested this is either the greatest or only need for this type of investment, or even that they should be located within Cornwall. The hub concept, whether physical or not, is used to demonstrate the potential impact of improving environmental growth and economic resilience collaboratively rather than trying to achieve this one business at a time.

[7] https://www.gov.uk/government/publications/uk-food-security-index-2024/uk-food-security-index-2024
[8] https://www.gov.uk/government/statistics/agriculture-in-the-united-kingdom-2023

# Priority Actions

# 1.

## Transitioning to a resilient and sustainable food supply chain

### Priority Actions

- Help the sector navigate the options for measuring and reducing its environmental impact and establish where the sweet-spots for combined environmental and commercial growth lie.
- Encourage diversity in horticulture to capture the growing market for plants and plant-based proteins.
- Sustain and develop the production of meat, dairy, fish and other animal products from low impact/regenerative agriculture.
- Evolve new markets/uses for the wide variety of fish and seafood landed in CIoS.
- Explore new manifestos of hub to reduce the environmental impact of food distribution.
- Investigate how and where the CIoS distinctive sectors, e.g. data/space; digital tech; renewables; tech metals could help deliver:
    a. Environmental gains, e.g. reduction in fossil fuel use, improvement in soil structure and biodiversity.
    b. Cost reductions, efficiency improvements and a more circular economy.
    c. New protected growing environments powered by clean energy; reducing the risks and uncertainty associated with uncontrolled environments.

# 2.

## Sorting out skills

From farmers and fishers to manufacturers, chefs and shopkeepers, those who work in agrifood perform the vital task of keeping the nation fed, yet we live in a culture where those jobs are undervalued and often considered uninspiring. Not only does this fail to recognise those who commonly do these jobs against the odds as a way of life, it seriously hampers the ability to plan succession and develop the next generation of professionals to continue this work. If the UK is serious about improving its food security it is essential this is addressed. In CIoS this is of even greater importance given the higher-than-average proportion of the population employed in the sector.

Actual pay levels in agrifood are in fact generally more agreeable than the perception, but it can be difficult for the brighter stars who join a smaller business to understand how they might carve out a longer term career within it. This leads to an unproductive cycle of poor retention.

This can stem from the fact that SMEs tend to be set up by entrepreneurs who have a great product idea but may not have any formal experience of commercial production, or who establish their business at micro level but do not have access to the knowledge and skills for managing growth, including managing employees, once demand takes off. Development can be difficult for these businesses to navigate.

Farmers are often encouraged to diversify by adding value to their primary product but there can be an assumption within policy that adding value to primary produce is relatively simple and the economic benefits guaranteed when the skills required and risks and costs involved are often significant.

The expertise to support these types of transition can be hard to find. Affordable support is often generic or limited, and specialist support unaffordable. If the sector is to achieve its potential, the current shortage of high-quality guidance, training and expertise capable of supporting the diverse opportunities for transformational change that clearly exist, must be addressed.

A wider and possibly more serious issue for long term growth and development of the sector is the lack of provision for teaching of food knowledge and skills within the National Curriculum, accompanied by a rapidly diminishing number of opportunities for continuing education in agrifood. For example, there is no current local provision for apprenticeships or degree apprenticeships in many of the most sought-after agrifood skills. Local colleges offer some provision in further and higher education for agriculture, horticulture and hospitality, but not for fishing, butchery or food processing. This is partly because the current apprenticeship system allows the supply-demand cycle to get locked in decline.

This cycle – lack of demand leading to reduced provision, leading to even less demand – can only be broken by interventions that change perceptions and improve the quality and volume of provision hand-in-hand.

Work is already being done that could position CIoS as a national leader in reversing perceptions of the agrifood sector as a place to build worthwhile careers. This includes ensuring that education providers are aware of the wide range of less-well-understood opportunities within agrifood, for example: engineering, design, scientific research. However, that cannot succeed long term without fundamental change in the way food education is profiled and delivered, from Key Stage 1 onwards.

Without these things in place there is a real danger of significant contraction in production capacity that will severely impact the UK's food security.

**Lack of demand leading to reduced provision, leading to even less demand – can only be broken by interventions that change perceptions and improve the quality and volume of provision hand-in-hand.**

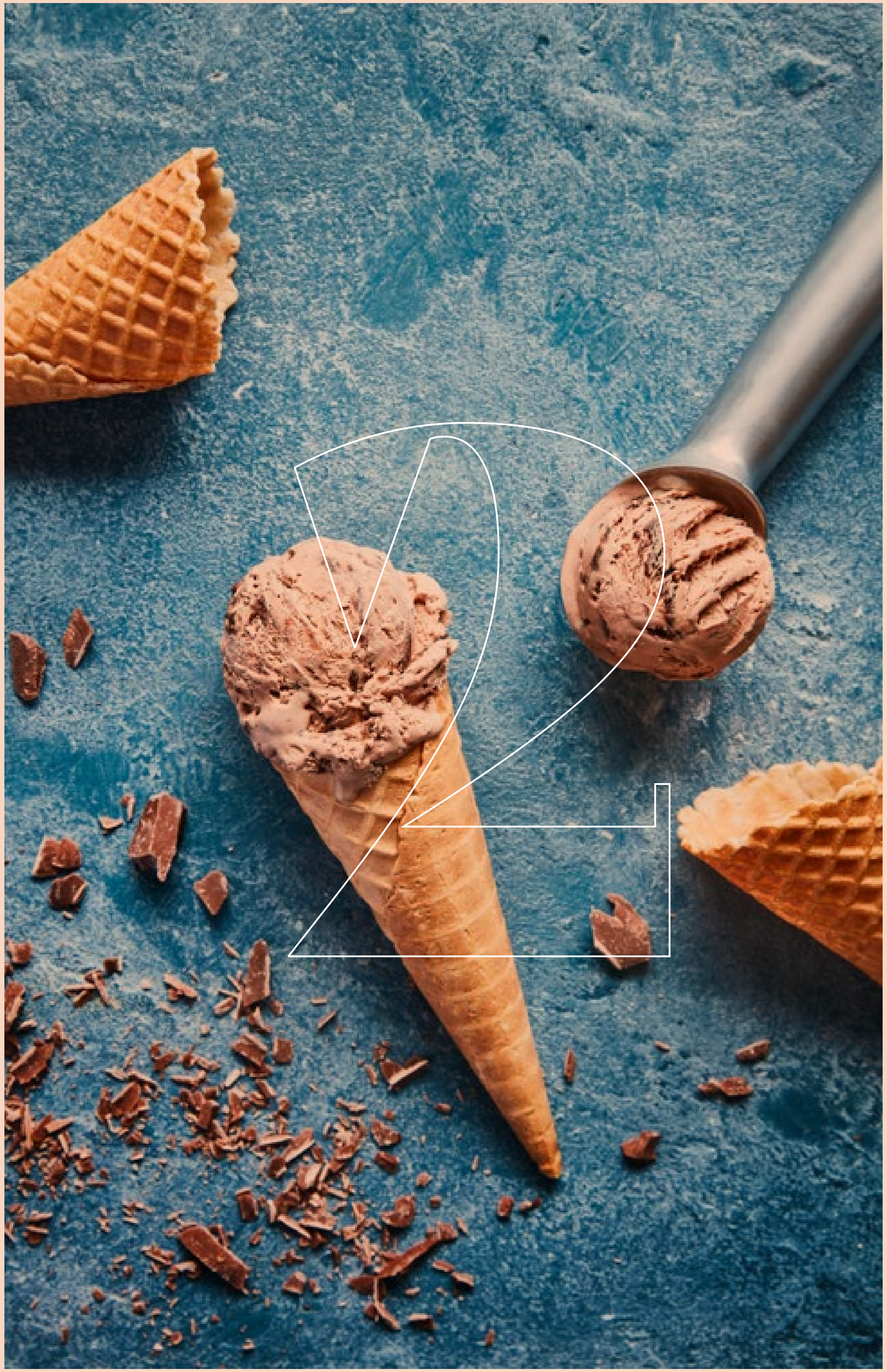
# Priority Actions

## 2.

## Sorting out skills

### Priority Actions

- Continue work with education providers and the industry to create the right platforms for developing food skills and learning.
- Address the current lack of development pathways for the sector within the CIoS education system, especially in food manufacture and linked skills, e.g. engineering.
- Upskill existing employers to produce cultural transformation in the management and development of their employees.
- Identify and coordinate sources of sector expertise appropriate for businesses from all subsectors at all stages of development, including guidance and training for farmers, growers and fishers who want/need to diversify or add value to their primary produce.
- Ensure there is provision for the new skills and knowledge the sector needs to become greener, cleaner, fairer and more resilient.
- Identify any remaining gaps in skills and knowledge, and work with education providers and professional bodies to fill them.

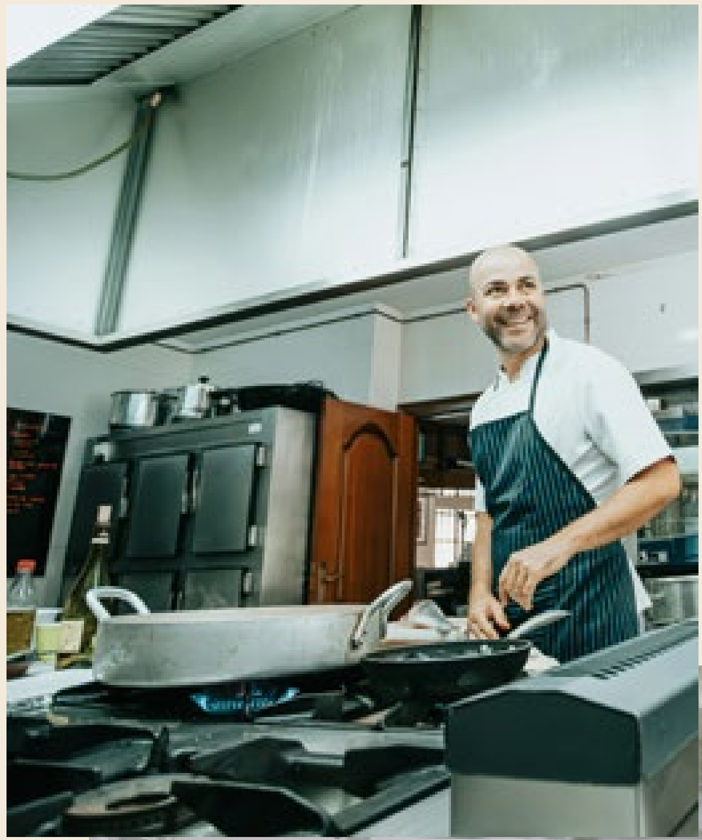


# 3.

# Fostering growth

## Productivity

Economic productivity, or the value of output, i.e. turnover, a business generates per worker, is a recognised measure of commercial strength. The agrifood sector is often referred to as an area of poor productivity and strategic economic investment initiatives tend therefore to assume the whole sector suffers from poor productivity and needs to deliver improvements.



**Just a modest 1.5% growth in UK food manufacturing, i.e. excluding the rest of the agrifood sector, would increase GVA by £400M.**

This is far too simplistic in a sector that is vast and complex and does not reflect its true value and potential or that of specific sub-sectors or businesses within it. For example, there is no capacity in this conventional productivity metric to measure the progressive lean transformation that has been achieved in agrifood to meet 24/7 availability, shelf-life requirements and minimum wage increases while mitigating inflation, maintaining low prices and complying with food safety legislation.

Productivity metrics and remedies also tend not to recognise that growing a low productivity sector that accounts for a huge proportion of the economy and employment by a relatively small amount has the potential to achieve as much overall growth as growing a much smaller but highly productive sector. For example, just a modest 1.5% growth in UK food manufacturing, i.e. excluding the rest of the agrifood sector, would increase GVA by £400M.

Within any sector there will be poor-performing and high-performing businesses or segments and it is essential that, within the sectoral approach (which has many benefits), there are measures to prevent a poor-performing business in a high growth potential sector automatically being regarded as a valuable business, or highly successful businesses being undervalued because they belong to a sector that is classified as unproductive.

An assessment of productivity that includes all the following factors would produce a much more meaningful representation than the measurement of output in £s per worker:

- Growth potential.
- Potential for improved productivity regardless of growth, i.e. from current trade.
- Potential impact of further productivity losses if unchecked, i.e. the need for productivity improvements.
- Wider benefits and value to the economy, environment and community.
- Requisite importance to the nation's security and sustainability.
- Potential loss of that business/sector.

# Priority Actions

# 3.

## Fostering growth

### Productivity

## Priority Actions

- Conduct a root and branch study of productivity, highlighting those businesses and sub-sectors that could act as productivity benchmarks, beacons and buddies to those who are underperforming and want to improve.
- Examine the standard methods and data used to measure productivity and identify where/how they could be enhanced or extended to create a more appropriate model for agrifood.

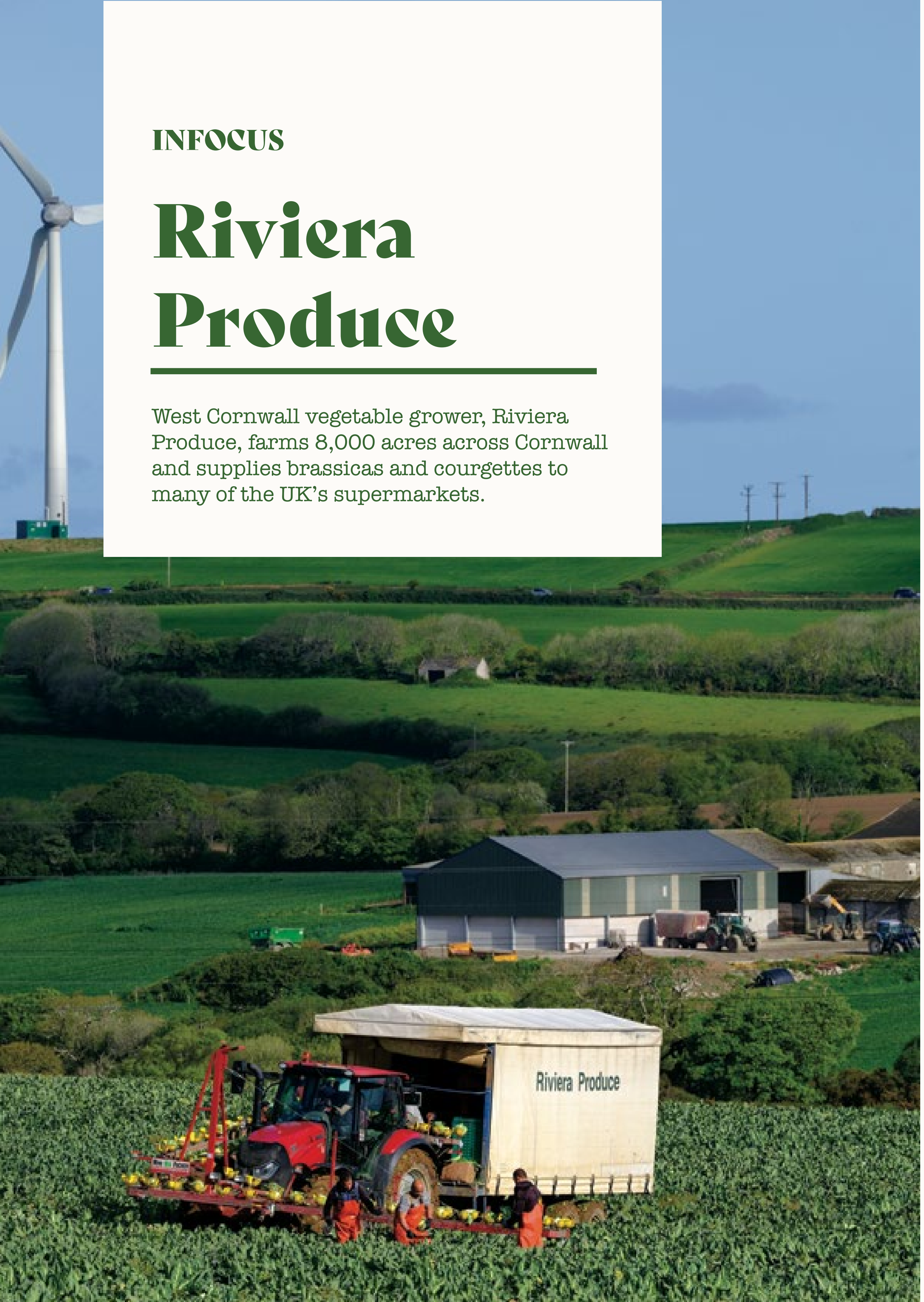
# 3.

## Fostering growth

### Encouraging innovation

Trends in food production and consumption and routes to market are constantly shifting and operators in all parts of the supply chain need to stay abreast (preferably ahead) of these trends to maintain productivity and market position. That change is happening at a phenomenal rate and there are opportunities and commercial advantage to be gained by pioneers who can bring new solutions to market.

Currently CIoS produces a rich wealth of food and drink but in real terms it produces a relatively small number of products in any notable volumes. These are typically household grocery staples, i.e. the lower value, high volume part of the market that has historically been associated with less nature-friendly production methods. CIoS is demonstrating that this no longer needs to be the case and that it is possible to combine high volume production for the commodity supply chain with high environmental standards and economic growth. This is where significant food security gains can also be made, with a consistent supply of affordable, fresh, everyday produce that has a positive impact on the environment.




INFOCUS

# Riviera Produce

West Cornwall vegetable grower, Riviera Produce, farms 8,000 acres across Cornwall and supplies brassicas and courgettes to many of the UK's supermarkets.

The £50m business has doubled in size every five years. They employ around 600 people, including agronomists, mechanics, plumbers, electricians and drivers as well as pickers and packers.

Over the last 7 or 8 years, fifth and sixth generation David and Tom Simmons have made the conscious decision to move the business towards net zero, not because their customers are demanding it, but because they feel it's the right thing for them to do to preserve the business and the environment for the generations who follow.

They grow cover crops including Phacelia (a colourful member of the borage family, highly attractive to bees) instead of ploughing, to improve the soil structure and fertility, aid pollination, reduce run-off, improve water retention and make the ground more workable.

Buckwheat is grown to release phosphates and clover to fix nitrogen, resulting in a sharp drop in fertilizer use. The use of pesticides has also reduced as a result of growing companion crops that attract the predators of the insects that love to damage the vegetable crops.

Both hydrogen and methane have been introduced as alternatives to diesel for fuelling tractors. The methane is captured from dairy farm slurry and the benefits are therefore two-fold - preventing the release of methane into the atmosphere and reducing the use of fossil fuels.

The business generates 1MW of energy from its own solar panels and has installed a ground source heat pump which is also able to capture and redistribute the heat generated from the on-site refrigeration units.

David feels it is the responsibility of farmers to drive positive change by building it into their plans rather than waiting for legislation to come along. However, he also feels more could be done to aid, incentivise and hasten progress. For example:

– more research into the manufacture/ implementation (rather than just the design or theory) of process automation;

– an understanding that sufficient land needs to be preserved for food production;

– improved capacity and infrastructure of the National Grid.

**A larger grower going to such lengths to invest in making positive changes speaks volumes about the need for widespread transformation and demonstrates that it is entirely possible.**

## Collaborations can generate valuable exportable assets and/or inward investment for the region, especially when they make leading edge discoveries.

At the same time, new and adapted foods and drinks are needed to provide sufficient and sustainable nutrition for a growing global population and to overcome the impacts of climate change on food production. While the jury is still out on some (e.g. lab-grown meat), the rapidly expanding market for products of sustainable horticulture, e.g. plant-based proteins, presents real opportunities.

In a similar way, the outputs of agrifood extend in numerous directions beyond food and drink. Life sciences are exploring new uses for plant extracts, e.g. to create medicines, while designers are developing new materials from plants to replace plastics. Developments such as this could potentially find new uses for plants that are already produced prolifically and successfully in CIoS, e.g. turning outgrade potatoes into biodegradable starch-based packaging or creating health supplements from brassicas.

There is a need for more research to underpin and direct these developments and for the agrifood industry, researchers, health professionals and government to collaborate to fulfil this need. CIoS, together with the wider South West, has all the tools to make ground-breaking developments in this sphere but relationships between the public sector, education/research establishments and the private sector are not currently aligned to the point where all three of those players are in a position to grasp the opportunities that are waiting. When fully developed, these collaborations can generate valuable exportable assets and/or inward investment for the region, especially when they make leading edge discoveries.

Technological innovation also has the potential to help every part of the sector overcome labour shortages, for example developing robots to undertake some of the repetitive jobs that have become hard to fill, alleviating the skills shortage, creating cost savings and enabling workers to carry out more interesting tasks, in turn improving the perception of the sector as a place to develop skills and careers. This could potentially halt the current decline in next generation farmers, fishers and food producers and in turn aid food security by helping to sustain primary food production.

INFOCUS

# Phytotechnology

Using plants for medicinal and nutritional purposes is nothing new. However, as technology evolves, the amount and type of information that can be captured from plants and the uses that information can be applied to are opening up new possibilities.

Phytome Life Sciences based on the Roseland peninsula is unlocking the scalable, uniform and reproducible production of specific high-value chemicals, materials, therapeutic molecules and increasing food production in plants and fungi. Projects include plant derived medicines to alleviate life-debilitating illnesses such as epilepsy and Crohn's disease.

Its research examines the molecular construction of plants and fungi, revealing how their performance can be modified, and engineered through breeding and environmental influences, to produce greater or lesser concentrations of specific compounds for medicines, chemicals and materials.

Unlike genetic modification, which has generated public concern, this technology has the potential to optimise the food value of specific plants and enhance other specific qualities such as drought or disease resistance completely naturally.

This type of knowledge and innovation will become increasingly important as the world attempts to mitigate the impacts of climate change on food production.

**The food system must embrace and adapt to change swiftly, using the combined opportunities created by science and technology to help overcome the advancing challenges of climate change and declining human health and wellbeing.**

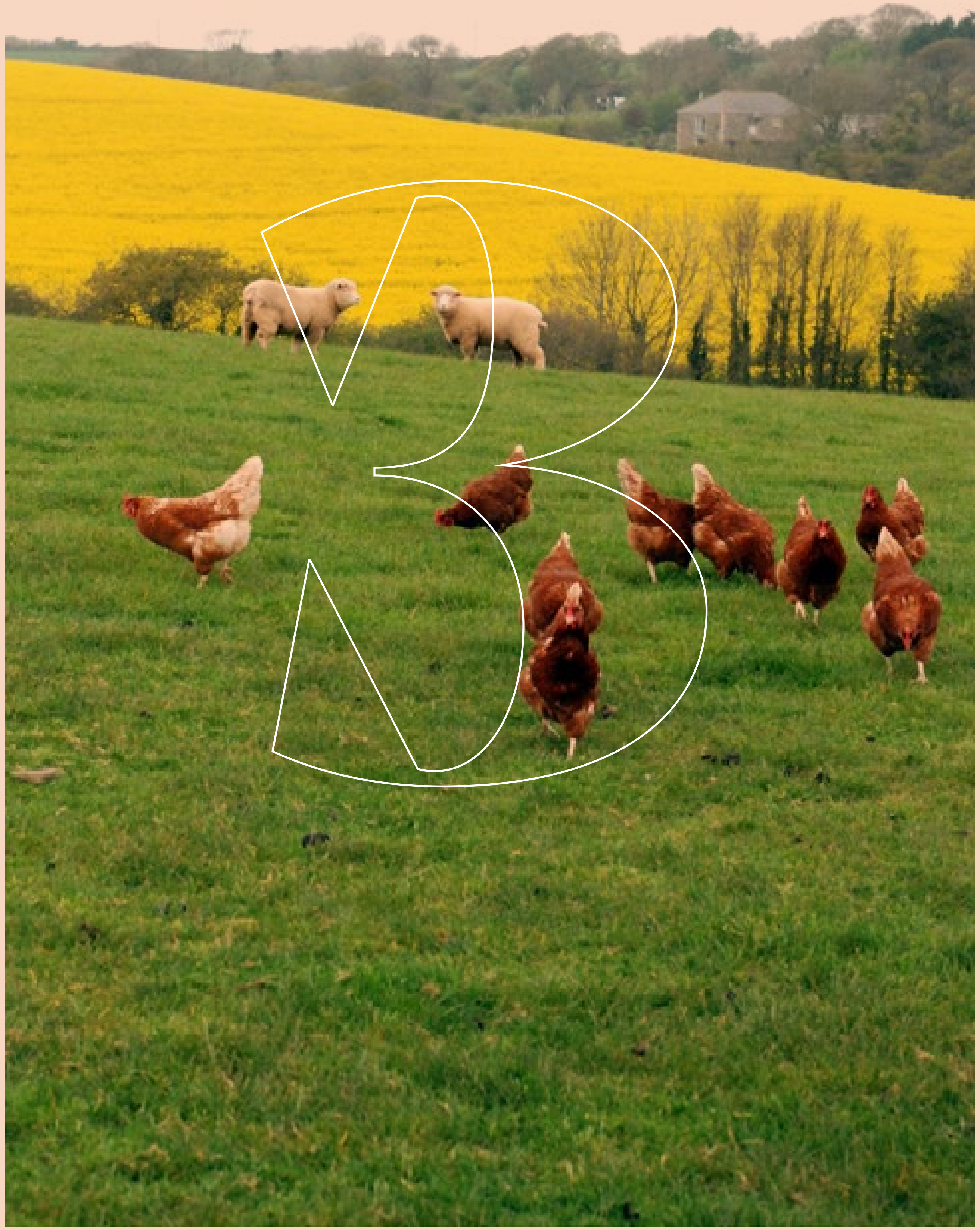
# 3.

## Fostering growth

### Encouraging innovation

### Priority Actions

- Seize developments in science and technology, e.g. robotics, AI, biotech, to:
    a. Replace some of the more menial or repetitive tasks in the sector.
    b. Identify non-food uses for food crops to generate higher value and/or repurpose waste.
    c. Optimise food values, genetic performance and production methods to produce more/better food with fewer resources.
    d. Extend the production season, enabling current crops to be produced for a longer period or to capture the more lucrative early and late season markets (bearing in mind that there are often good reasons for working with the natural seasons and this needs to be done selectively).
- Identify and develop the opportunities and provision within higher education and research establishments in CIoS and the wider South West to drive new agrifood discoveries and innovation, encompassing fishing, food manufacturing and processing as well as agriculture.



# 3.

# Fostering growth

## Creating successful growth models

Due to a relative absence of large businesses, CIoS agrifood has developed successful business models that demonstrate how a sector consisting of mainly SMEs (including many micro) can achieve operational scale and strength without losing the character on which its reputation and enviable market position depend.

**Success is underpinned by knowledge and understanding of what 'good' looks like and how to achieve it.**

The 'hub and spoke' model, where one processor works with multiple smaller producers, is a prime example. The hub processor guarantees a market for the product, trains and upskills the producers to attain the quality standards they require; often pays a premium for the product and will take on the responsibility for marketing, keeping abreast of technology and market trends, etc at a scale the individual producer would find impossible. This plays an important part in supporting and sustaining family size farms and fishing operations, which would otherwise not be able to thrive at their level of production in an increasingly competitive marketplace. Saputo, St Ewe Eggs, Riviera Produce, Southern England Farms, Rodda's, Trewithen Dairy, Philip Warren & Son, Ocean Fish and Falfish are all good examples and demonstrate how vital this model has become to the growth of many of the significant CIoS agrifood brands.

This format for nurturing and providing a collective market for multiple curated suppliers is replicated at retail level by businesses such as the Cornish Food Box Co, Tamar Grow Local and the Great Cornish Food Store. Wholesalers such as Westcountry's Plough to Plate arm have also embraced local suppliers to create a convenient and cost-effective route to the hospitality sector, while drinks wholesalers such as St Austell Brewery offer many local drinks producers access to a significant on- and off-trade. These all create routes to markets of varying sizes and types for CIoS producers while providing local residents and visitors with a variety of convenient options to purchase CIoS produce through shorter supply chains.

Norton Barton Food Enterprise Zone [9] is another innovative model where one site is home to multiple complementary types of food processing. Each enhances the combined offer and benefits from economies of scale in the form of consolidated back-office functions, utilities and services, distribution and marketing capacity, and management and investment. With one overall controller, environmental and circularity benefits between the various producers can also be maximised.

In some cases these models have enabled the business ownership to be retained locally, unlike more traditional larger-scale acquisitions and mergers. However, CIoS needs external investment in the growth mix – without it some of the major investments, e.g. by Saputo in Davidstow Creamery or, many years ago, Samworth Brothers in Ginsters, would not have happened, and their Cornish products would not have become the national category leaders they are today. Businesses of this scale also have the capacity to soften market shocks and invest in their people and strategic development in a way that smaller businesses might find more difficult. Samworth Bros, for example, has led the way in developing with local farmers a dedicated year-round supply of locally grown vegetables for pasty production, which many thought impossible in Cornwall's climate. In turn, this has benefitted the other major pasty producers but is unlikely to have happened without Samworth's investment capacity.

The flip side of inward acquisition is the potential for the new owner to capitalise on the brand's Cornish or Scillonian identity while diluting its commitment to local production, labour or raw ingredients. Critically, although ownership on this scale inevitably aids growth, the company profits are no longer retained within CIoS.

This is a complex subject with numerous pros and cons and the reality is that the economy of CIoS is stronger with all these growth models in the mix rather than dependence on any one of them. Whatever the model, success is underpinned by knowledge and understanding of what 'good' looks like and how to achieve it. For example, there is every probability that producing the same volume more efficiently is likely to have greater impact on many SMEs as a first step and sound platform for growth than simply producing more and selling it further afield.

[9] https://theartisanfoodvillage.com

INFOCUS

# Newquay Orchard

‘Built by the community for the community’ is the sort of strapline that is easy to come up with but much more difficult to put into practice.

However, at Newquay Orchard they really do walk their own walk.  Deeply rooted in its community, it’s not just a green space; it’s a vibrant example of what can happen when people come together with a shared vision.

The café, community gardens, wildflower meadows, farm and orchard areas are all buzzing with activity, learning, and care – and all run by a dedicated team of staff and volunteers who believe passionately in the ethos and mission of the orchard.

This sense of purpose is woven through every aspect of the site – its regenerative growing practices, a welcoming environment for people from all walks of life, or empowering young people, many with complex needs, through supported internships and learning programmes. It is a place that genuinely grows people as much as it grows food.

From working with a local GP surgery to tackle type 2 diabetes by giving families weekly veg bags, to creating opportunities for young people who might otherwise be very isolated, the team at the orchard are doing this absolutely in the belief that the site is transforming people’s lives and the environment for the better.

**Bringing the right people together with common purpose and determination can trigger innovative solutions just as much as investment and policy decisions.**

Many CIoS agrifood businesses would benefit from help in identifying the most valuable potential new markets for them, and in understanding how to reach them. This will vary from business to business and range from maximising the ultra-local market to exploring opportunities outside CIoS and outside the UK.

It is entirely possible that this could lead to brand new opportunities that could transform relatively low value products or sub-sectors, by identifying new market segments, new uses or new technologies for them.

One market opportunity that is underdeveloped by CIoS agrifood is supplying the public sector. Various attempts, some more successful than others, have been made to tackle the food and drink requirements of the NHS and schools locally. The NHS Net Zero [10] ambition and recent government announcements provide scope for this to be reignited, but the opportunities are much wider and more creative than hospital meals and school dinners. The successful social prescribing, for example, of veg boxes from Newquay Orchard to patients with type 2 diabetes, is just the start of a whole new range of commercial possibilities for local suppliers, including those operating on a very small scale, which will also help tackle some of Cornwall's health and inequality challenges.

The sector insights report published in 2024 [11] identified a valuable growth opportunity for CIoS in developing its food processing capacity, adding value to a greater proportion of its quality primary ingredients, and retaining that value within CIoS. Clearly this depends on the primary production base being sustainable.

The real potential of all the key growth opportunities also depends on the ability of CIoS agrifood to promote and market its USPs to both existing and new audiences, ensuring its stand-out quality and attributes are well understood. While individual businesses will want to build their own brands in this way, the collective marketing of the sector has the potential to work alongside, reaching much wider audiences and generating much broader impact on the local economy.

[10] https://www.england.nhs.uk/greenernhs/a-net-zero-nhs

[11] Collison & Associates, 2024 Cornwall & the Isles of Scilly Farming, Fisheries & Food Insights Report

# Priority Actions

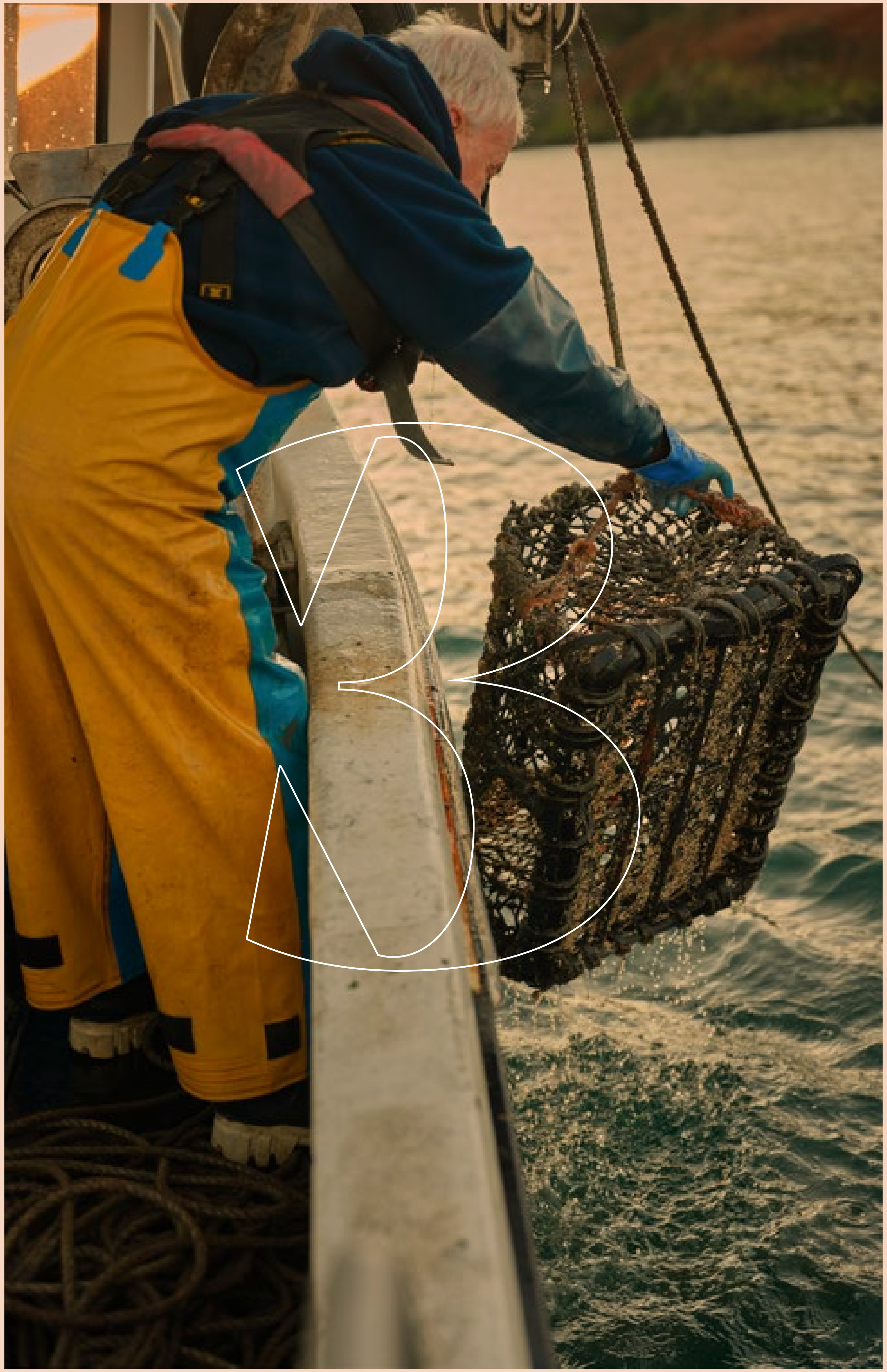
# 3.

## Fostering growth

### Creating successful growth models

## Priority Actions

- Investigate the feasibility of creating new and sustainable solutions for public sector procurement of CIoS food and drink, coordinating with work being undertaken nationally in this sphere.
- Create more 'hub and spoke' opportunities for processing of primary produce within CIoS to capture greater value locally and provide dependable markets for CIoS farmers and fishers.
- Ensure there is sufficient long term critical mass in sustainable and regenerative primary production within CIoS to support processing in this way, also extending the variety and scope of production to drive new types of processing.
- Motivate and foster budding entrepreneurs and scalable entrepreneurial businesses ripe for growth and development, nurturing their drive and ambition.
- Investigate the feasibility of consolidating production/distribution/sales locally, nationally and internationally, to generate the economies of scale to help SMEs become more resilient and reach the identified new market opportunities.
- Support all the above with appropriate sources of expertise, data, mentoring and investment, along with initiatives to promote the sector to new audiences.



# 3.

# Fostering growth

## Forming strong alliances

A feature of contemporary economic growth is that it delivers much more wide-ranging benefits than commercial success alone. While a strong triple bottom line has long been considered the measure of true business success, the concept has become increasingly important to agrifood as the labour market has become more competitive, the marketplace more crowded and the need for environmental growth more pressing. Given the multiple interconnectivities between health, wellbeing, poverty, education and economic productivity, there is much merit in taking a wide angle view of the strategic development of the sector.

There is therefore a need to facilitate stronger alliances and understanding between agrifood and the foundational sectors of education and health, while there are clearly a great many mutually advantageous opportunities to be explored both across the different parts of the agrifood sector and between agrifood and other commercial sectors, particularly the distinctive sectors and the other core sectors.

Stronger connections at strategic level between the relevant sectors would ensure that ambitions are better aligned and interventions and investments created around common goals to ensure they generate the widest and best value.

As just one example, agrifood has significant unexplored potential to transform the seasonality of the CIoS tourism proposition through a whole new category of food and drink tourism, where food and drink activities and experiences, some of which could be directed at the corporate market, are the reason to visit rather than the incidental bonus.

Within that approach it needs to be acknowledged that there will be undeniable tensions between competing ambitions. For example:

– Floating offshore wind could produce an important source of clean energy but is in danger of compromising valuable fishing capacity if not developed sensitively. The same applies to solar/wind farms and agricultural land; or seaweed farming and watersports/tourism.

– Cornwall's iconic pasties and clotted cream would not be recommended as a regular part of a healthy lifestyle but they are the backbone of Cornwall's food manufacturing industry supporting thousands of households with permanent, year-round, secure jobs.

– Local food systems are regarded by some strategists as the most environmentally sustainable, but many CIoS food businesses need to export to markets outside Cornwall and sometimes outside the UK to offset Cornwall's highly seasonal market and lack of any major centre of population.

– Supermarkets are an abomination to some food and drink producers but the lifeblood of others.

Striking a balance between all the competing tensions is no easy task and there is no smart formula for relieving them other than encouraging a collaborative approach that generates greater understanding between the different perspectives and uncovers the win-win opportunities.

While this is a strategy intended specifically to help agrifood in Cornwall and the Isles of Scilly overcome its challenges and realise its potential, it is not intended to be inward-looking. As well as developing much more productive linkages within CIoS, it is important to identify opportunities and forge alliances beyond the Tamar if CIoS is to become the national and even international beacon of excellence in agrifood that is within its gift.

**Agrifood has significant unexplored potential to transform the seasonality of the CIoS tourism proposition through a whole new category of food and drink tourism.**

# Priority Actions

3.

## Fostering growth

### Forming strong alliances

### Priority Actions

- Ensure CIoS food and drink suppliers and buyers are aligned on the type and volume of products available/needed, to maximise the opportunities in the local supply chain and keep local food networks alive throughout the year.

- Foster strategic alliances with the other core sectors and the distinctive sectors to maximise efficiency and results.

- Develop similar alliances with the foundational sectors of health and education, in particular to improve links between public and private sectors and discover innovative solutions to persistent problems.

- Identify the opportunities that would benefit from a wider approach, building the appropriate and mutually beneficial regional, national and international linkages.

# 4.

## Fixing the foundations

No industry can achieve its potential without the correct infrastructure, policies and investments in place to support growth and development.

Continuing to reproduce similar initiatives, policies and interventions to those used throughout decades of successive governments will only continue to deliver the same results – low productivity, poor reputation, lack of skills, etc.

The absence of a comprehensive national strategy for food, an outdated local agrifood strategy and a tendency for funding programmes to consist mainly of grants to individual businesses, has exacerbated a lack of sector cohesion and direction and led to a plethora of different organisations and initiatives with varying missions within and around the sector, but at the same time a shortage of robust sector expertise within education, policy and development.

The government's Modern Industrial Strategy is a welcome start in reversing that and the long-awaited new UK Food Strategy and promised 25-year road map for farming are reassuring announcements. It is important that CIoS, where agrifood is proportionally a much greater part of the economy than the UK as a whole, does not miss this milestone opportunity to help shape these strategies by sharing with government the challenges and potential solutions outlined in the Good Growth Plan and in this Food Strategy and Action Plan.

**CIoS agrifood needs to work with local and national government, regional bodies and other key sectors to create the policies, infrastructure and investment that will provide the platform for it to thrive.**

However, the barriers to growth are not just related to the current policy void and poor delivery mechanisms.

The sector's supply chain infrastructure in CIoS is in a precarious position. For example, the cattle markets, slaughter facilities and wholesale distribution networks that are essential to livestock production have contracted and consolidated over recent years as costs have mounted while production has reduced, to the extent that the number of operators is now seriously limited. There is a danger that if primary production dips below a viable volume, which is entirely possible, the whole of the local support services infrastructure will disappear, potentially ending commercial livestock farming in CIoS and its associated land management capacity.

In addition to the lack of learning provision for agrifood in CIoS, businesses within the sector often find they are unable to recruit higher-level skills from other parts of the country or retain skilled employees once they reach the stage where they want to buy their own property, due to uncompetitive house prices and rents. An increased supply of housing would loosen the supply v demand deadlock and result in more affordable homes both to buy and rent.

Businesses located in the more remote rural locations or operating non-standard working hours, i.e. a large proportion of the agrifood sector, find the lack of feasible public transport options makes it difficult to attract non-drivers to work for them, reducing the labour pool even further.

Planning policy and the planning system are perceived by much of the CIoS agrifood sector as outdated and a barrier to growth rather than a critical partner in enabling growth. Businesses feel this has led to long delays that hamper development plans and a shortage of commercial workspace at affordable rents, the lack of which has become critical and is currently halting the development of businesses ready to grow. Businesses find they are sometimes outbid by large national chains or hospitality businesses taking workspace on edge of town trading estates,

which not only delays growth, but contributes to the decline of town centres and forces businesses to continue working in outdated premises, hampering productivity.

Insufficient grid capacity and long lead times being quoted by National Grid for installations have been identified as another barrier to growth by significant CIoS agrifood businesses.

While road travel around Cornwall has benefitted from major improvements, the transport infrastructure remains challenging for any successful business needing to build or maintain business relationships outside CIoS and often even to do business within the area. Frequent disruption to flights to/from Newquay airport and rail services results in wasted time and expenditure. For businesses on Scilly this is of course even more of an issue. Profit margins in agrifood are so low and time so precious that this cannot fail to have a detrimental impact on productivity.

Together, these factors only exacerbate the CIoS structural disadvantage of geographical distance from any major urban centre of population or transport network. One leading brand has suggested these infrastructure issues could lead to them relocating outside Cornwall to reach their potential.

CIoS agrifood therefore needs to work with local and national government, regional bodies and other key sectors to create the policies, infrastructure and investment that will provide the platform for it to thrive.

# 4.

## Fixing the foundations


## Priority Actions

- Engage with government in the development of the UK Food Strategy and 25-year farming roadmap.
- Ensure policy and investment programmes are designed to sustain sufficient production volume to support sector infrastructure, and vice versa.
- Help devise more flexible planning policies and a planning system that is responsive to the needs of business, to:
    a. Kickstart the provision of more workspace for food production.
    b. Enable and encourage the repurposing of redundant agricultural buildings into workspace to increase supply.
    c. Make commercial rents more affordable through increased supply.
    d. Prioritise or ring-fence new workspace for local businesses.
- Encourage efforts to generate more affordable housing, both rented and privately owned, to help overcome the skills shortage, particularly initiatives such as Homes for Cornwall,[12] which take a creative approach to providing homes specifically for working people and their households.
- Ensure the development of the CIoS transport infrastructure aids the efficient distribution of food and drink.
- Ensure grid capacity is adequate to support growth of the agrifood sector.
- Improve capacity within the current education infrastructure to support the sector, especially the food manufacturing segment.

[12] https://www.homesforcornwall.org

# What does success look like?

With this action plan in place, by 2035 CIoS agrifood could be leading the way as the nation's No.1 green and fair food economy. The following examples of how CIoS agrifood might look in the next ten years illustrate the potentially far-reaching impact of this strategic approach to growth:

**Postive agriculture**

**Real living wage sector**

**Sustainable healthy food choice**

**Year-round supply**

**No commercial food waste**

**Food education programme**

**Industry-sponsored apprenticeships**

**No.1 food destination**

**Agrifood excellence**

## Positive agriculture

– Agricultural production will have recognised and built on existing good practice in the sector, become carbon positive and be delivering net biodiversity gain.

## Real living wage sector

– Every business involved in farming, fishing food or drink production will pay at least the Real Living Wage and find it economically viable to do so.

## Sustainable healthy food choice

– Fish and seafood caught or harvested in the seas around CIoS will be formally recognised in marine planning as a climate-smart, sustainable, healthy food choice. A greater percentage will be processed locally and it will be consumed much more widely, including in schools, hospitals and care homes.

## Year-round supply

– A wide variety of both staple and high value crops (vegetables, salads, fruit) will be produced year-round, using protected environments and locally generated clean energy, including energy from geothermal production. This supply will fill the current 'hungry gap' in local, seasonal, fresh produce, replacing imports with a supply of fresh, affordable produce for local independent retail and hospitality businesses and to ensure a year-round supply for schools, hospitals, care homes and social prescribing.

## No commercial food waste

– No commercial food waste in CIoS will go to landfill. Waste will be reduced through smart purchasing technologies and redistribution and gleaning schemes for those in need. Any remaining food waste produced in CIoS will be used to produce clean energy through anaerobic digestion or compost for horticultural production.

## Food education programme

– An industry-sponsored food education programme will ensure every child in CIoS learns how to cook and how food is produced.

## Industry-sponsored apprenticeships

– A system of industry-sponsored post-16 apprenticeships and degree apprenticeships will provide opportunities for high-earning careers in agrifood and a supply of talent for the sector. A working group of stakeholders will be producing a blueprint for government to roll out nationally.

## No.1 food destination

– CIoS will be a year-round destination of choice for visitors from all over the world with an interest in food, drink, farming or fishing.

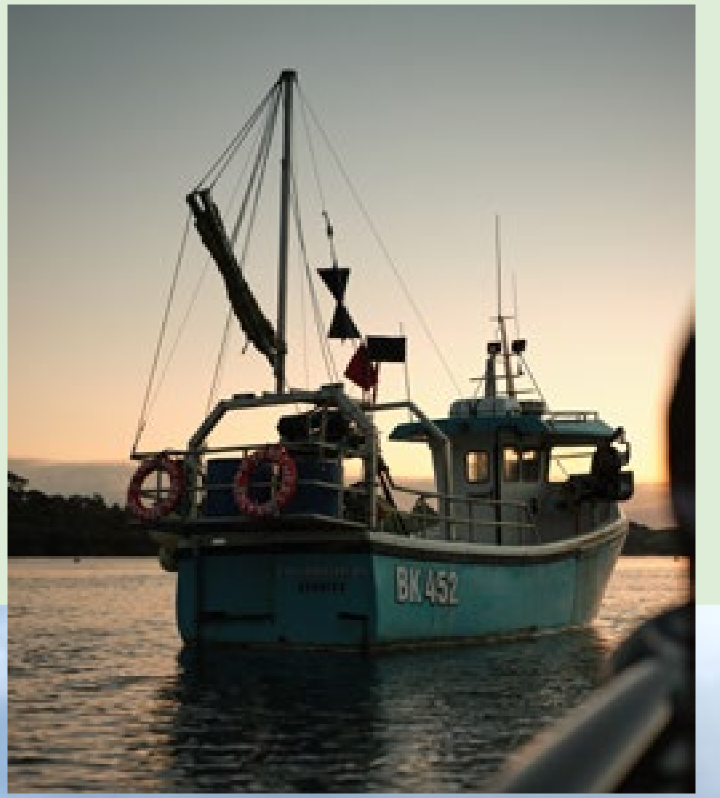
## Agrifood excellence

– CIoS will be known for its agrifood excellence; a combined resource of existing and new knowledge, learning, research, technology and assets. This will be used to lead thinking on the creation of successful and sustainable food economies. CIoS businesses will have access to the very best and latest guidance, and that expertise will be a valuable commercial asset.

# Intervention & investment

The transformed CIoS agrifood sector outlined here will only happen with sound strategic steer and the support of those in and around the sector.

As a starting point, commitment is needed from the CIoS Economic Forum to the critical nature and fundamental value of agrifood and the need for strategic intervention to lever priority developments and investments.




The greatest short and long term impacts are likely to come from an investment plan to provide the skills, knowledge and expertise that are a common thread throughout this strategy and fundamental to the success of all other investments and initiatives. This needs to create:

**A curriculum that embeds food positively into our culture from an early age.**

**Expertise and intelligence to support the ambitions of entrepreneurial agrifood businesses.**

**Learning opportunities and motivation for those who want to make a career in food, drink, farming or fishing.**

**A comprehensive resource to aid all parts of the supply chain in becoming greener and cleaner.**

These needs all come under the umbrella of education but are a mix of what is currently delivered as education and business support. Collectively they put agrifood at a disadvantage when it comes to economic growth and development but also the ability to reach its wider potential and generate the wealth of additional positive outcomes it could achieve for Cornwall and Scilly.

Whether this is delivered through one centre of agrifood excellence or several coordinated parts; and whether it is a standalone physical structure on a new or existing site, or it has no specific physical centre at all, depends on the viability of the various options and the level of investment possible. What is important is that the opportunity to address these needs is not missed.

A comprehensive, co-designed investment plan, with targeted, measurable goals and well-defined budgets and responsibilities that maximise cross-sectoral and inter-sectoral collaboration and opportunity, is the first step in achieving this specific ambition and all the other ambitions within this strategy and action plan.

**Although agrifood is a huge and complex sector, in real terms the investment needed to make transformational change is small. However, the ripple of positive impacts would run wide and deep and the potential gains are therefore massive.**

# Appendix

## A wide range of local stakeholders kindly took part in the development of this strategy

CIoS Stakeholder Group:
CIoS Economic Forum
CIoS Growth Hub
Cornish Fish Producers' Organisation
Cornwall College Group
Cornwall Council
Cornwall Food & Drink
Cornwall Food & Farming Group
Cornwall Gateway
Cornwall National Landscapes
Cornwall Trade and Investment
Eden Geothermal/Eden Project
Falmouth University
Sustainable Food Cornwall
University of Exeter Business School
Visit Cornwall

**CIoS Food Board:**
Richard Bain – Buttermilk Confectionery
Francis Clarke – Trewithen Dairy
Nathan Cudmore – Cornwall Council
Richard d'Entrecasteaux – Danish Crown
Steve Dustow – Colwith Farm Distillery
Richard Harding – Norton Barton Artisan Food Village
Jamie Hext – Roseland Market Garden
Daisy Hillier – Loveday Distilling
Jonathon Jones – Tregothnan
Hannah Millington – Cornwall Bakery
Josh Parker – Parker Confectionery
Clare Parnell – Carruan Farm
Amanda Pender – Island Fish
Adam Robertson – Verdant Brewing
Tom Sobey – Origin Coffee
Rebecca Tonks – St Ewe Eggs
Paul Trebilcock – W Stevenson & Sons
Lauren Vincent – Baker Tom's Bread
Philip Warren – Philip Warren & Son
Penny Williams – Pennys Pies
Rob Wing – Wing of St Mawes
Jak Yelland-Hill – St Austell Brewery

This CIoS Food Strategy and Action Plan has been created as part of the Great Cornish Food - Raising the Bar programme, part-funded by the UK Government through the UK Shared Prosperity Fund. Cornwall Council has been chosen by Government as a Lead Authority for the fund and is responsible for monitoring the progress of projects funded through the UK Shared Prosperity Fund in Cornwall and the Isles of Scilly.

Funded by UK Government
Cornwall Council
Council of the Isles of Scilly
Good Growth – Cornwall & Isles of Scilly Shared Prosperity Fund

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Good Growth