

# Planting the Seeds of Growth



**A strategy for fruit,  
vegetable and  
potato growth  
to 2030**

**Scotland**  
A LAND OF  
food and drink

# Foreword

**In 2017, an Industry Leadership Group (ILG) of businesses and stakeholders from the fruit, vegetable and potato (FVP) sector came together to develop Scotland's first FVP growth strategy. This was in response to Ambition 2030, which aims to double Scotland's food and drink industry to £30bn by 2030.**

The FVP sector strongly shares that ambition for growth and this strategy challenges the industry and the supply chain to meet head-on the opportunities and challenges going forward.

Obviously, a balance has to be struck between ambition and pragmatism but the FVP sector is well placed to drive this vision of increased economic growth, better co-operation between businesses and within supply chains, collaboration between private and public bodies, and a business culture that builds in resilience and values the natural capital that goes into the healthy and provident food that consumers want.

Market forces and supply chain pressures have created commodity markets for much of our FVP produce. However, a greater awareness from consumers and governments of the natural capital used in producing healthy food and the people involved in getting this food to our plates will help to address this race to the bottom.

So too will this growth strategy, and the partnerships and momentum it aims to generate. I believe these will create stronger confidence to invest and innovate, and provide clear signals of a strong future that values new entrants and people already working in this sector. The links to public health and education will be strengthened and valued, and diets will be healthier. Future government policies and budgets on food and drink will work in tandem and in collaboration with industry in delivering these ambitions.

We see this strategy not as the end of a process, but the beginning. To help sustain momentum, we will review progress on our recommendations in summer 2019, and report back to our sector and stakeholders.

I would like to thank all members of the group for their insight, experience, vision and valuable time in bringing together this report. Their understanding of the complexities has been a tremendous help.

Special thanks go to all the guest speakers who provided detail, optimism and challenged our thoughts.

Also, a big thank you to James, Graham and Zoe at Scotland Food & Drink for their drive and enthusiasm and to Sarah for collating and writing up the report.



**Allan Bowie**  
Chair, Fruit, Vegetable and Potato  
Industry Leadership Group

**I welcome this new strategy for the fruit, vegetable and potato sector in Scotland. Some of the healthiest, freshest and highest-quality produce anywhere in the world is grown here. There is no doubt we face challenges, particularly relating to Brexit, but this sector has huge potential if we can increase consumption, displace imports and capitalise on our renown and reputation in international markets.**

The sector already makes a considerable contribution to our rural economy – I want to see it achieve more. Fruit, vegetables and potatoes are key to our wider efforts to improve the nation's health and wellbeing, particularly in children and young people – I want us all to eat more local produce. Growing fruit, vegetables and potatoes can help create more sustainable food production and I want farming to play its part in our climate change ambitions.

I am very grateful to Allan for his leadership of the group and to the members for their valuable contributions. They have provided us with a roadmap that will indeed plant the seeds of growth for an industry which has a significant role to play in our Land of Food and Drink.



**Fergus Ewing**  
Cabinet Secretary for Rural Affairs  
and Connectivity



# Summary

**Scotland's food and drink industry aims to double its value to £30bn annually by 2030. The fruit, vegetable and potato (FVP) sector shares its ambition to grow. We're already a successful, efficient and innovative sector, and we want to be more so.**


To make this happen, a working group of leading businesses and stakeholders in the FVP sector has put in place a strategy for sector growth. Meeting regularly over 2017-18 and gathering input from other organisations and businesses, we have developed a plan for growth based on four main elements:

- seeking to add value at all points
- collaborating and innovating along the supply chain and in partnership with the public sector and others
- developing a plan for people and skills in the sector
- understanding and targeting opportunities for markets, products, crops etc.

For each of these, we have developed specific recommendations, which are within the power of the industry and its stakeholders to deliver, and which are summarised in this plan. They involve a wide range of activities to build capacity and develop our market opportunities, and among them are initiatives around:

- skills including apprenticeships
- workforce
- collaboration, with funding and flexibility to support Producer Organisations, including for producers of all sizes
- food waste and retention of value
- public health and education.

Over the coming months, we will work with the sector and our stakeholders to scope out the recommendations in more detail, and develop clear actions and objectives for each one.



**By turning the recommendations into reality, we will provide the sector with a springboard for growth, bringing not just economic benefits for Scotland but a healthier nation and robust environmental stewardship.**

**“My 2030 will see Scotland's fruit, vegetable and potato industry flourish and prosper. Our farming operations and stewardship will be world class, our industry a go-to destination for young people and emerging talent, our products and provenance renowned for exceptional quality, and through increased consumption of what we produce, the health of our nation will improve.”**

Susie McIntyre, Kettle Produce



# Our ambition for 2030

**To grow the value of fruit, vegetables and potatoes in Scotland won't just mean growing and selling higher volumes of produce.**

Success will come from adding value to what we sell, and doing so in the widest possible sense: increasing efficiency, seeking premiumisation and driving value and profit into the entire supply chain from furrow to fork. Success will also stem from understanding our market opportunities and building our collective capacity to realise them.

## OUR BUSINESSES AND MARKETS

**To deliver our ambitions for growth, we need to:**

- support the profitability, resilience and attractiveness of Scottish businesses of all sizes
- displace imports from competitor countries whenever possible
- grow export revenues and markets.

We want every possible plate to be piled high with Scottish fruit, vegetables and potatoes, in Scotland, the rest of the UK and key markets internationally. We want our customers in all those markets to value Scottish produce, knowing it's healthy, tasty and good for the planet. And we want Scotland to be one of the best places in the world to run a food and drink business and to attract and retain investment from home and abroad.

To achieve that, businesses of all sizes need access to market intelligence and insights to support growth.

## OUR CULTURE

To deliver our 2030 ambition means developing our supply chains and internal operations, our innovation culture, and our workforce. We need to build our capacity in all of these areas, cultivating our strengths and weeding out our weaknesses.

### **We need:**

Supply chains that are streamlined, responsible and collaborative, adding value at all stages and deploying cost-effective production processes and logistics – whether we're selling locally, in London, or abroad.

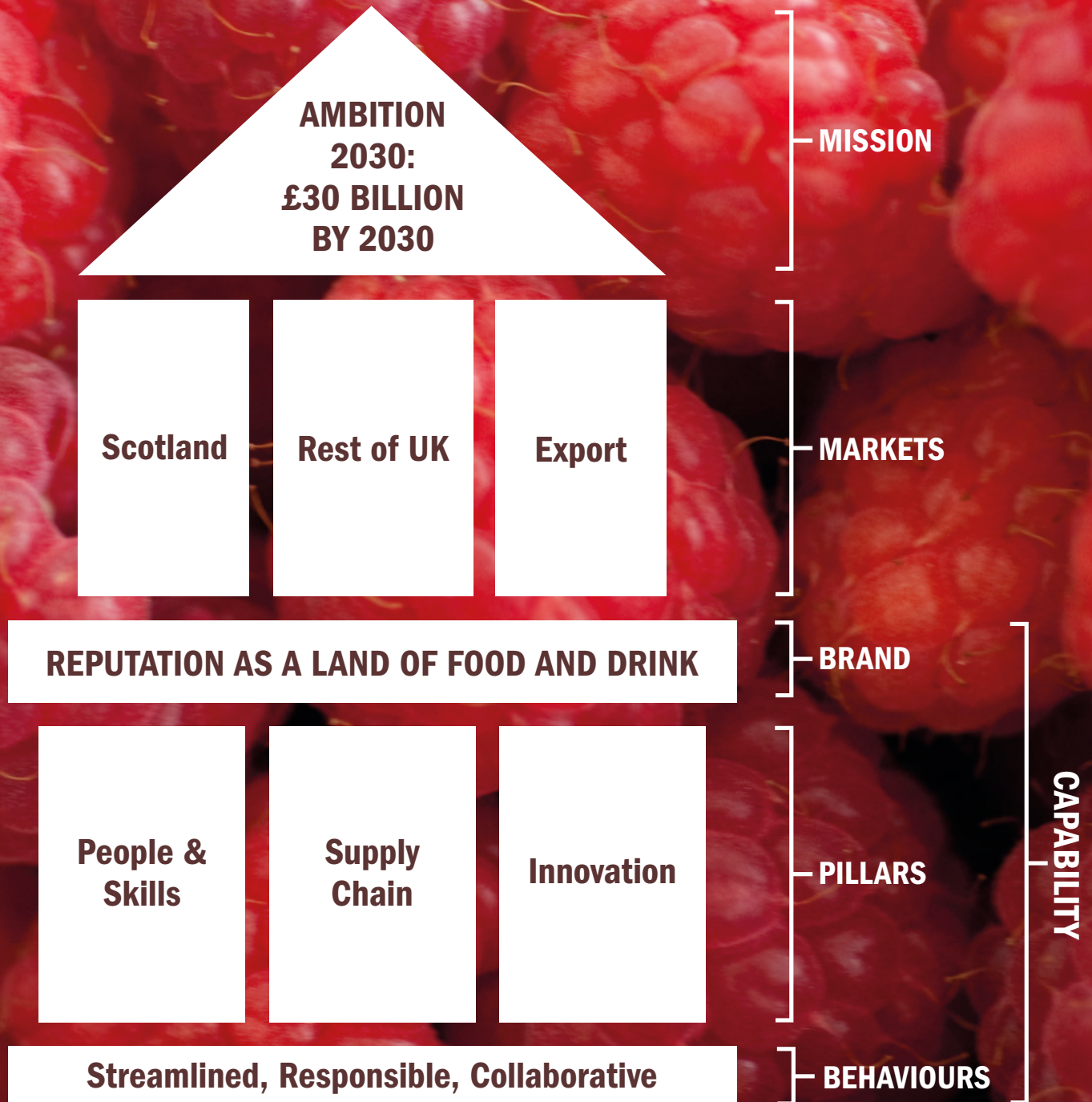
A culture that embraces innovation, with businesses of all sizes able to connect to commercial R&D.

And a sector underpinned by training and skills (including business skills), with horticulture and agriculture seen as an attractive career at all entry points, and a pipeline of talent keeping us diverse and dynamic.

**It's certainly not a done deal that we realise our 2030 vision – the challenges are substantial. But with a roadmap to plan, invest and unlock growth, the sector can pursue a prize that we know is there.**



# THE PILLARS OF GROWTH FOR SCOTTISH FOOD AND DRINK







**“I look forward to 2030 with much optimism. In Scotland we have fantastic resources in the fruit, vegetable and potato sector and produce healthy, tasty produce that is in demand. We have a great opportunity to grow our sales over the next 10 years. Continuing innovation and investment in our people will be key drivers to our future growth.”**

John Gray, Angus Soft Fruits



# Strengths, opportunities, challenges

**It's clear that the FVP sector in Scotland has intent to grow. Businesses are looking to new markets and ways of operating, and they're investing in growth.**

It's also evident that we're good at what we do. The output value of soft fruit grew by £68m to £128m (an increase of 112%) over the decade to 2015; vegetables were up £48m to £116m (+72%). Our success is built by able people, efficient supply chains and a strong research base.

The opportunities for growth are also clear. Demographic and consumer trends create opportunities for market and product development and even to get Scottish and other UK consumers eating just one extra portion of vegetables a day would deliver significant economic and public health benefits.

## THE CHALLENGES

However, there are no quick fixes for growth. The sector is complex, with subsectors such as soft fruit and potatoes at different stages of market maturity.

It's also diverse. Some of the key issues of small-scale producers are very different to those of larger businesses.

In addition, we have the uncertainty of Brexit and urgent issues around workforce and seasonal workers.

Finally, the challenges to get consumers to eat more Scottish fruit and vegetables (and also to value them) are significant. There are complex issues in play, including public health and education and different parts of government and public sector need to deepen their extensive collaboration further.

TREND	OPPORTUNITIES FOR SCOTTISH FVP SECTOR
<p><b>Ageing population:</b> in 2030, 20m people in the UK will be over 60</p>	<ul style="list-style-type: none"> <li>* More health-aware consumers</li> <li>* Product development catering for different taste, texture, nutrition needs</li> </ul>
<p><b>Urbanisation:</b> 60% of the world's population will be urban in 2030</p>	<ul style="list-style-type: none"> <li>* Product development catering for limited cooking space and food on-the-go</li> <li>* Sophisticated consumers keen on provenance and quality</li> </ul>
<p><b>Wellbeing:</b> growing interest in personalised diets, gut bacteria</p>	<ul style="list-style-type: none"> <li>* Promote Scottish FVP as a source of health and happiness, and find ways to differentiate Scottish produce</li> <li>* Variety and product development to maximise nutrition benefits</li> </ul>
<p><b>Conscience:</b> greater awareness around food waste, sustainability and ethical production</p>	<ul style="list-style-type: none"> <li>* Emphasise environmental credentials of Scottish FVP</li> </ul>
<p><b>Culture:</b> e.g. social media (food as self-presentation; power of influencers); global flavours</p>	<ul style="list-style-type: none"> <li>* Tap into marketing and branding opportunities for Scottish produce</li> </ul>



# A roadmap for growth

The following recommendations provide a roadmap for building capacity and grasping market opportunities in fruit, vegetables and potatoes. They aim to avoid duplication with existing initiatives in Scotland and the UK (such as Good Food Nation, Scotland’s diet and obesity strategy and Peas Please), focusing instead on opportunities to fill gaps, better join the dots or create synergies.

Not every recommendation applies sector-wide – the needs of different subsectors (fruit, vegetables, potatoes) or sizes of businesses are not identical. But overall, they should position all in the sector to meet their own ambitions for growth.

## RECOMMENDATIONS FOR 2030 SUCCESS

NO.	ISSUE	RECOMMENDATION	LEAD RESPONSIBILITY
1	General	Ensure the FVP sector is at the top table	Scotland Food & Drink Partnership

## MARKET AND BRAND DEVELOPMENT

2	Market development	Develop our market intelligence on FVP opportunities	Scotland Food & Drink Partnership
3	Brand development	Push forward on provenance and differentiation	SEFARI
4	Market development	Collaborate on marketing campaigns	Scotland Food & Drink, Food Standards Scotland
5	Market development	Work with public procurement for growth and the public good	Scottish Government
6	Market development	Get more businesses exporting more	Scotland Food & Drink Export Board
7	Market development	Extend food education in the classroom (but don't stop there)	Scottish Government, Scotland Food & Drink People & Skills Board, industry



# CAPACITY BUILDING

NO.	ISSUE	RECOMMENDATION	LEAD RESPONSIBILITY
8	People and skills	Strengthen skills for future success	Scotland Food & Drink People & Skills Board, industry
9	People and skills	Work all the angles on careers and skills	Scotland Food & Drink People & Skills Board, industry
10	People and skills	Secure financial support for skills development	Scottish Government
11	People and skills	Fill critical workforce gaps	Scottish Government, UK Government
12	People and skills	Open the doors to new entrants (especially small and micro businesses)	Scottish Government, UK Government
13	Supply chain	Develop and share best practice in supply chains and build on producer organisation (PO) collaboration models	Scotland Food & Drink Supply Chain Board
14	Supply chain	Reduce waste to reap rewards	Zero Waste Scotland, industry
15	Supply chain	Pursue more efficient and sustainable use of natural resources	SEFARI
16	Supply chain	Support smaller-scale producers to invest and thrive	Scotland Food & Drink Supply Chain Board
17	Innovation	Plan for the farms of the future	Scotland Food & Drink Innovation Board
18	Innovation	Have evidence-based discussions and policy around science and emerging technology	SEFARI
19	Innovation	Accelerate progress on packaging and facilities to reduce waste and add value	Zero Waste Scotland



# HOW THE RECOMMENDATIONS WILL UNLOCK GROWTH

In developing this growth strategy, the ILG identified three main tasks. These shaped our work and underpin the recommendations on the following pages.

First, we needed to analyse the issues facing different sizes of businesses and subsectors, and their ambitions and challenges. This has been done over the past months, through discussions with stakeholders across the sector.

The second task, based on that analysis, was to develop a roadmap for how the public sector and private sector can build the fruit, vegetable and potato sector's capacity – focusing on the three pillars of people & skills, supply chain, and innovation.

The sector needs to be in peak condition to go for the market opportunities out there and the recommendations in this strategy will achieve that.

The third task is to support businesses with market development, market intelligence and the backing of a strong, differentiated brand for Scottish fruit, vegetables and potatoes, on which they can develop their own growth and marketing plans. The recommendations in this plan will put in place that support.

In approaching all of these tasks, it's important we learn from best practice not just in our own sector, but in other sectors too; we should also be open to learning from our own research base and other disciplines.





## GENERAL

### RECOMMENDATION 1: ENSURE THE FVP SECTOR IS AT THE TOP TABLE

There are already initiatives that could help the fruit, vegetable and potato (FVP) sector to grow – such as the Scotland Food & Drink Boards set up to deliver Ambition 2030, and funding schemes for industry.

All involved should engage fully with the sector – designing and delivering support that will help the sector, or its subsectors, to grow. Businesses in turn should engage actively with these initiatives.

This will put fruit, vegetables and potatoes at the table with whisky, seafood, red meat and other produce as Scotland builds capacity and promotes its food and drink.

**Responsible: Scotland Food & Drink Partnership**

### MARKET AND BRAND DEVELOPMENT

### RECOMMENDATION 2: DEVELOP OUR MARKET INTELLIGENCE ON FVP OPPORTUNITIES

Businesses know there are opportunities for growth, but want to know more.

We should develop a market intelligence project to understand which segments of the home market (geographic and demographic) present the best opportunities for market growth and increased value.

This will include exploring opportunities in foodservice as well as retail and how existing mechanisms such as Showcasing Scotland events could support the growth of FVP businesses.

This will help the entire supply chain to hone its USP and plan for growth and market development, including product, crop and variety development.

**Responsible: Scotland Food & Drink Partnership**

### RECOMMENDATION 3: PUSH FORWARD ON PROVENANCE AND DIFFERENTIATION

We should develop our understanding of what differentiates (or could differentiate) Scottish produce.

Specifically, we should establish a research project to determine attributes associated with fruit, vegetables and potatoes grown in Scotland. This should comprise a review of existing research and, potentially, new work to examine issues such as plant and soil health and links to nutritional and environmental benefits.

This could boost our ability to add value and target key markets and inform brand development (whether national branding or consumer brands). It will also support decisions about product, crop and variety development and innovation.

**Responsible: SEFARI**

### RECOMMENDATION 4: COLLABORATE ON MARKETING CAMPAIGNS

One carrot grower can't change the way consumers think about vegetables. But together, the sector can do – with the right information and budgets in place.

First step is to build on Recommendations 2 and 3. With greater insights on market opportunities and differentiation, we will be positioned to move forward on collaborative marketing planning.

This will include looking at public-private funding options; and opportunities for promoting consumption of Scottish fruit, vegetables and potatoes to Scottish consumers and also in the rest of the UK and chosen export markets. We should aim to connect with existing initiatives, not reinvent the wheel or duplicate existing activity.

**Responsible: Scotland Food & Drink,  
Food Standards Scotland**





## RECOMMENDATION 5: WORK WITH PUBLIC PROCUREMENT FOR GROWTH AND THE PUBLIC GOOD

Public-sector bodies – such as local authorities and the NHS – have a role to get more people in Scotland eating Scottish fruit, vegetables and potatoes. There would be health benefits as well as economic ones.

We recommend a review of the proportion of Scottish-grown produce used in the public sector, and the adoption of innovative measures for increasing that.

This should include standards for school meals in Scotland and opportunities for free fruit and veg schemes in schools. It would also consider opportunities to promote Scottish produce under the devolved Welfare Foods package.

**Responsible: Scottish Government**

## RECOMMENDATION 6: GET MORE BUSINESSES EXPORTING MORE

Some businesses in the sector are already doing well here. Let's do more.

Firstly, Scottish Development International's in-market specialists should determine the best export opportunities for both existing products and new products, looking at key and emerging markets across the world.

Secondly, businesses need practical support on issues from logistics to export guarantees to licences. The Market Driven Supply Chains (MDSC) project should help the sector set up a collaborative export group; this could employ an export specialist to advise on such issues.

**Responsible: Scotland Food & Drink Export Board**

## RECOMMENDATION 7: EXTEND FOOD EDUCATION IN THE CLASSROOM (BUT DON'T STOP THERE)

Building on the work that is ongoing across the school curriculum, organisations who work in education, such as RHET (the Royal Highland Education Trust), should have more secure funding to educate young people about food production, cooking with Scottish produce, and farming and horticulture careers; and to increase training provision for teachers and careers advisors.

Secondly, we need to work with young adults and young families, linking with initiatives such as Good Food Nation to get Scottish fruit, vegetables and potatoes into more Scottish kitchens, and deliver public health benefits as well as economic growth.

Through such work, we want the public to value Scottish produce and understand the people and processes involved along the supply chain from furrow to fork.

Industry has a strong role in supporting this activity on the ground – from school visits to CSR initiatives.

**Responsible: Scottish Government, Scotland Food & Drink People & Skills Board, industry**

## PEOPLE AND SKILLS

### RECOMMENDATION 8: STRENGTHEN SKILLS FOR FUTURE SUCCESS

Industry should deepen its work with skills initiatives to articulate, support and develop the skills needed for success in the short, medium and long term.

This should include wider skills areas such as engineering, agronomy, food science, accounting and leadership development.

Scotland's universities and colleges, as well as bodies such as Lantra, have a clear role in shaping the agenda and solutions here and we should make sure the industry is engaged in this work from the outset.

**Responsible: Scotland Food & Drink People & Skills Board, industry**



## RECOMMENDATION 9: WORK ALL THE ANGLES ON CAREERS AND SKILLS

Following on from Recommendation 8, we must translate people and skills planning into real-life provision.

Firstly, we should co-ordinate and align all our skills activity to ensure that entry points and training pathways are coherent and comprehensive – whether we're telling an eight-year-old about horticulture, or a teenager or career-changer about training. Not just in farming communities, but all over Scotland.

Secondly, the industry should provide more placement, internship, apprenticeship and graduate opportunities, so that people can always find a way into our sector, and make progress once they are here.

**Responsible: Scotland Food & Drink  
People & Skills Board, industry**

**“The most obvious way for the 2030 plan to achieve its ambitions for growth is through increasing consumption of fresh fruit, veg and potatoes throughout the UK. A massive increase in communication in schools and media about eating more of the good stuff is not only fundamental to the success of the plan, but should also help to improve the health of the nation.”**

James Porter, East Scryne Farm & Chair of NFU Scotland's Horticultural Committee

## RECOMMENDATION 10: SECURE FINANCIAL SUPPORT FOR SKILLS DEVELOPMENT

Skills development and life-long learning are a public good. We should design the allocation of publicly-funded grants and subsidies to incentivise this, especially since Brexit creates opportunities to re-design our approach and mechanisms for support along the food supply chain.

One option we recommend is refining the application and assessment processes for grants/subsidies to include scoring of applicants' commitment to skills development.

**Responsible: Scottish Government**

**“Together with other locally produced fruit and vegetables, potatoes can play a huge role in improving the health, environmental and economic profile of Scotland over the period of this plan. I'd like to see our policymakers put locally produced food as a cornerstone of their social agenda.”**

Robert Doig, Caithness Potatoes





## **RECOMMENDATION 11: FILL CRITICAL WORKFORCE GAPS**

Before and after Brexit, the industry needs access to the right people at the right times.

Firstly, this means putting in place a Seasonal Agricultural Workers Scheme (SAWS). In the absence of a UK-wide scheme, Scotland should pilot a regional scheme, looking at possible models such as the Australian two-year visa.

Secondly, we should ensure Scotland's FVP farming and processing businesses have access to the year-round workforce they need. We must also attract and retain the research talent and other qualified people we need.

All arrangements should include provision for non-EU workers as well as EU nationals.

**Responsible: Scottish Government, UK Government**

## **RECOMMENDATION 12: OPEN THE DOORS TO NEW ENTRANTS (ESPECIALLY SMALL AND MICRO BUSINESSES)**

To nurture a pipeline of talent and ambition into the sector, new entrants and new businesses should have access to grant support and soft loans.

The Farming Opportunities for New Entrants scheme should recognise small-scale and/or organic horticulture alongside the more traditional focus on livestock.

And in looking at post-CAP arrangements for the Small Farms Grant Scheme, we should include farms of less than 3 hectares.

**Responsible: Scottish Government, UK Government**

## **SUPPLY CHAIN**

### **RECOMMENDATION 13: DEVELOP AND SHARE BEST PRACTICE IN SUPPLY CHAINS AND BUILD ON PRODUCER ORGANISATION COLLABORATION MODELS**

There's no single model for best practice in supply chain collaboration in FVP – the sector's too diverse for that. But in each subsector, businesses can – and must – learn from successful practices.

We recommend mapping best practice in supply chain collaboration and resilience in FVP in Scotland, based on sharing risk and reward and adding value at every step.

Producer Organisations (POs) have been effective in this sector, and we expect them to play a role in best practice models. We also want the next phase of agricultural policy to build on POs and enhance them; certainly, match-funding should continue to be available.

We also recommend looking at new business models, including logistics, that could help FVP businesses add value, compete, and get the right food to the right places – sustainably, profitably and equitably.

For the sector to thrive, we need supply chains that are equitable and transparent along their length, through from producer to packer to retailer.

**Responsible: Scotland Food & Drink Supply Chain Board**





**“My hopes for 2030 are that small-scale growers leverage their strengths. I hope that they are helped along the way by a system that recognises the value in having a plentiful supply of diverse, prosperous, small-scale businesses in the mix.”**

Wendy Seel, Vital Veg

## **RECOMMENDATION 14: REDUCE WASTE TO REAP REWARDS**

Resource efficiency is good for the environment, for the wider public and for businesses.

The sector is working energetically to reduce waste, but we want to go further. We recommend an end-to-end study of waste reduction in the FVP sector, looking at every link in the supply chain – from crop varieties, to picking and processing technology, to retail and foodservice practices, to what consumers want to buy, to better models of redistribution of surplus for social good.

At every step we could find ways to boost efficiency, reduce waste and retain value through new processes and technologies – all of which will feed into business profitability and resilience.

**Responsible: Zero Waste Scotland, industry**

## **RECOMMENDATION 15: PURSUE MORE EFFICIENT AND SUSTAINABLE USE OF NATURAL RESOURCES**

Soil health is essential for future productivity and success.

In the seed potato subsector, crop rotation has already been beneficial and we want to explore the principle of more crop rotation in the vegetable and potato subsectors.

We recommend an impact study on crop rotation in Scotland's potato subsector initially. This would look at all the possible benefits and consequences in terms of resource efficiency, sustainability and Scotland's competitiveness in the short, medium and longer term.

**Responsible: SEFARI**





## RECOMMENDATION 16: SUPPORT SMALLER-SCALE BUSINESSES TO INVEST AND THRIVE

Smaller-scale and organic producers could benefit greatly from opportunities to collaborate.

Forming Producer Organisations (POs) to assist with marketing, sales, IT & e-commerce platforms, co-operative buying and equipment-sharing would certainly help these businesses to boost resilience and profitability. Whilst many businesses already know this, they need support to set them up and operate them.

In addition, we see benefits from strengthening local supply chains, and we recommend a research project on how to reinvigorate or create local supply chains that support collaboration, B2B intelligence, shared risk and best practice between local producers and wholesalers.

An indicator of success on this issue would be raised awareness and increased uptake of the Food Processing Marketing and Co-operation (FPMC) Grant Scheme.

**Responsible: Scotland Food & Drink Supply Chain Board**

## INNOVATION

## RECOMMENDATION 17: PLAN FOR THE FARMS OF THE FUTURE

Scotland's producers and processors need access to the technologies of the future (such as robotics or technology and processes to mitigate and adapt to climate change) and confidence to invest in them. We recommend establishing a future farms network in Scotland with a focus on fruit, vegetables and potatoes.

These demonstration units should be working farms that trial pioneering new technology (including affordable technology for smaller-scale producers) that will support our sustainable growth and competitiveness and be suited to Scottish needs.

First step is to prepare a business case, looking at facilities, funding, governance and operating options.

**Responsible: Scotland Food & Drink Innovation Board**

## RECOMMENDATION 18: HAVE EVIDENCE-BASED DISCUSSIONS AND POLICY AROUND SCIENCE AND EMERGING TECHNOLOGY

A forum should be established involving industry, academia and policymakers for informed and ongoing discussion about crop and soil science and possible and safe uses of emerging technology to enhance environmental management, public health and productivity.

With a safe space for evidence-based discussion, we will facilitate regulatory and commercial decisions based on rigorous science. We will also be better placed to maintain Scotland's research capability in this area.

**Responsible: SEFARI**

## RECOMMENDATION 19: ACCELERATE PROGRESS ON PACKAGING AND FACILITIES TO REDUCE WASTE AND ADD VALUE

The FVP sector in Scotland is already committed to progress towards a circular economy, but we want to accelerate this.

All players in the innovation sphere – academia, industry, funders – should recognise this as a priority area but we need to do even more and we recommend a commercial R&D project to explore innovative packaging options suited to our sector.

This could open up opportunities to reduce waste, add value and reach new markets – reducing plastic waste and the sector's environmental impact, whilst maintaining or extending product shelf-life.

Concurrently, the public sector, especially local authorities, must provide recycling facilities that marry up with the sector's needs and capabilities.

**Responsible: Zero Waste Scotland**







**“With Scotland committed to achieving the Sustainable Development Goals in 2030, our vision is for a food system which provides good livelihoods, nourishes everyone, looks after soil and wildlife, minimises waste and supports a thriving local food culture. Potato, vegetable and fruit production and consumption are at the heart of Scotland becoming a Good Food Nation.”**

Pete Ritchie, Nourish Scotland



## ACKNOWLEDGEMENTS

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Allan Bowie	Chair of the Fruit, Vegetable and Potato Industry Leadership Group
Andrew Faichney	Managing Director, East of Scotland Growers
Colin Campbell	Chief Executive, James Hutton Institute & Chair of Scottish Environment, Food and Agriculture Research Institutes (SEFARI)
Gillian Kynoch	Head of Fareshare Scotland
James Graham	Chief Executive, Scottish Agricultural Organisation Society
James Porter	Director, East Scryne Farm & Chair of NFU Scotland's Horticulture Committee
James Withers	Chief Executive, Scotland Food & Drink
John Gray	Commercial Director, Angus Soft Fruits
Pete Ritchie	Executive Director, Nourish Scotland
Robert Doig	Director, Caithness Potatoes
Susie McIntyre	Managing Director, Kettle Produce
Wendy Seel	Owner, Vital Veg

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Dave Ross	Agricultural Engineering Precision Innovation Centre
Donna Fordyce	Seafood Scotland
Fergus Ewing	Cabinet Secretary for the Rural Economy and Connectivity

Gabrielle Nuijstens-Vaarkamp	Topsector Horticulture & Starting Materials
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The Scottish Government Food and Drink Policy Team

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# We have set out a vision for the future of the fruit, vegetable and potato sector



## BUT HOW DO WE ACHIEVE THIS AMBITION?

This growth strategy is a statement of intent. If we harness the potential in front of the sector, set out in this strategy, the dividend for Scotland will be huge. We will drive economic growth, help make Scotland a healthier nation and boost our efforts to reduce food waste.

The fruit, vegetable and potatoes sector is diverse. Each part of the sector has different needs and priorities. However, if we work collectively with a focus on innovation, skills, developing the supply chain and building our markets, the future will be bright and the sector will make an even greater contribution to Scotland's food and drink success story.

Work begins now to turn recommendations into reality, identifying the resources needed to make them happen. We know there will be challenges along the way and uncertainties that hover over the sector. That is nothing new. However, it does mean we must be agile in our approach and, most importantly, we will need the support of all those who work in - and with - the sector.

When you look back on the last decade, the single most important ingredient in the success of the food and drink industry has been collaboration. It is what has taken farming, food and drink from being down the priority list to the top of the agenda in Scotland. It is that same mindset now required to address the challenges that still exist and the growth opportunities that lay in front of us.

This strategy marks the beginning of a new phase of work to drive added-value into the sector, with all the economic, health and environmental benefits that can bring. Time to get to work!

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