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Facilitating and Encouraging Short Food Supply Chains

A NATIONAL RURAL NETWORK REPORT

JUNE 2013



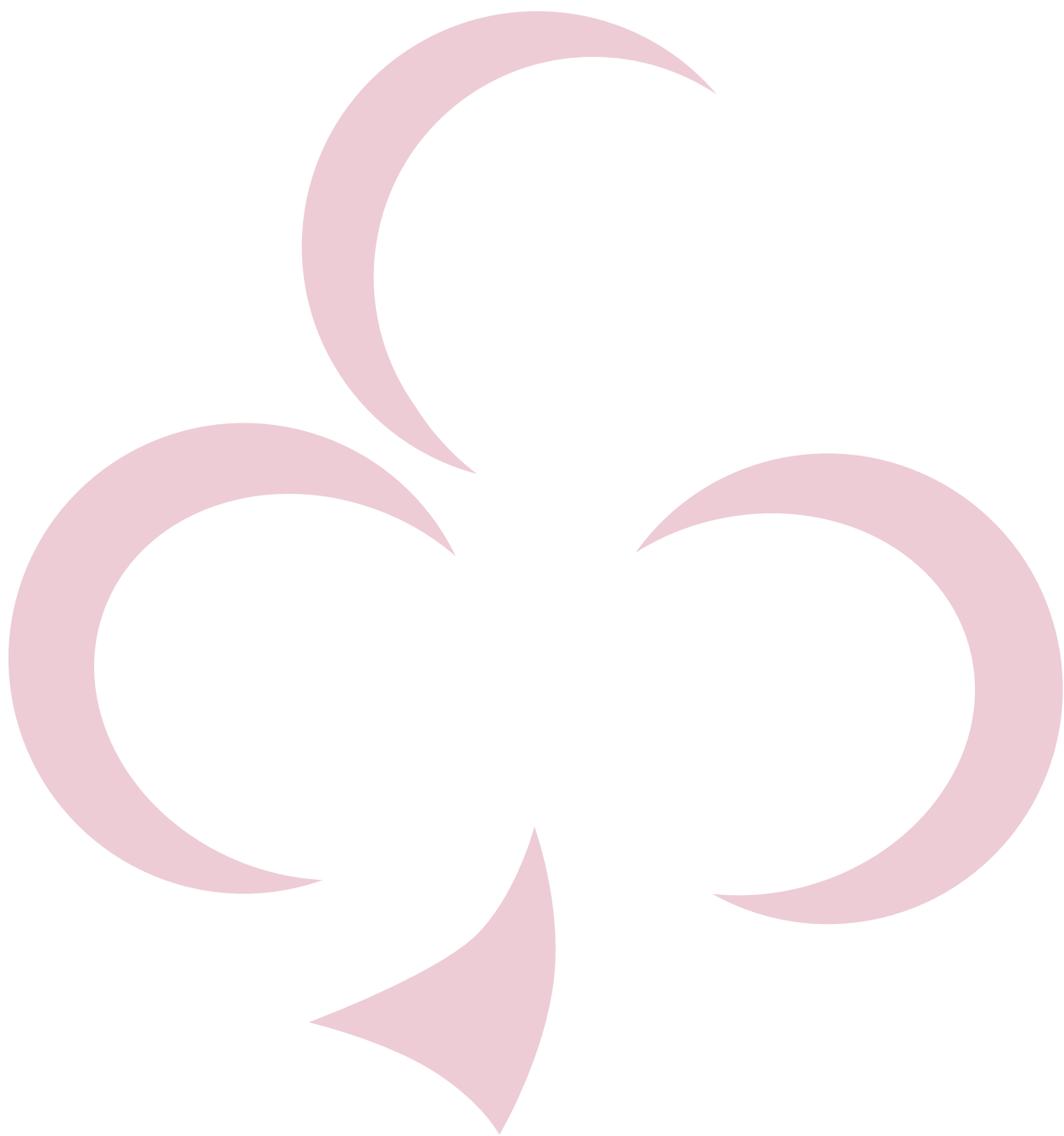




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Executive Summary

In recent years there has been a renewed interest and a significant growth in alternatives to the conventional food supply chain which allow primary producers and consumers to connect in new and more direct ways via outlets such as farmers' markets, online sales, restaurant sales, specialist retailers, etc. This study involved both desk research and intensive interviews with a sample of fifteen farm households who are involved to varying degrees in short food supply chain activity. The results of this research add to the emerging knowledge base on this fast-growing sector of the food industry and rural landscape and more specifically, suggest how the sector might be encouraged and facilitated to grow and develop further. Although the experiences of participants in this study have been mixed and there remain significant challenges and barriers to short food supply chain (SFSC) activity, all plan to continue operating in this sector of the food industry.

The key learning points to have emerged from this study include:

- Unless it is to remain at a relatively simple level, with limited potential for growth, SFSC activity appears to require the inputs (i.e. the skills and the labour) of more than one member of the farm household. It also appears that at least one member of the farm households embarking on this kind of activity will usually have significant off-farm work and life experience, or an entrepreneurial background or education qualifications outside of agriculture and farming.
- Individual farm households can improve the viability and sustainability of their farm businesses by operating at widely different scales within this sector, from those who will scale up and sell predominately into proximate and/or extended chains, to the greater number who will consciously continue to operate at a more small-scale level, typically with a high level of control and with a business model which is suited to their way of life and to the capacities of the farm holding and farm household.
- There is potential for this kind of activity throughout the country, but proximity or otherwise to population centres and/or a receptive consumer base appear to impact strongly on how and in what way the business evolves.
- The typical farm household which embarks on this journey seems to assemble and juggle a large range of outlets for their products, with a majority selling into three or more. There was a strong awareness of the need to spread risk and to remain flexible and alert to shifts in consumer demand and behaviour and to trends in the wider food industry.
- Each type of outlet has its benefits and its drawbacks and every farm household embarking on SFSC activity assembles a mix of outlets which 'works' for them and their operation. The factors which appear to determine the most suitable mix for each household include the location of the farm, the type of produce, the labour available to the enterprise, the personal preferences of the household with regard to selling, the level of ambition for the enterprise and the general market conditions. Face-to-face SFSCs and proximate SFSCs are the categories which appear to have the greatest traction with the farm households which took part in this study, with the most popular outlets being farmers' markets and local/regional restaurants. The more direct, face-to-face means of engaging with consumers – farmers markets, farm shops and farm-gate sales – seem to be holding up comparatively better in the current economic environment and a level of control, agency and cash-flow clearly remains with the producer. The retail and restaurant trades are perhaps the most problematic and risky in the current economic environment and the larger retail operations and chains do not appear a suitable outlet for most small-scale producers. On the other hand, more local and/or speciality shops appear a better and more long-term 'fit' for the kind of businesses involved in this study.
- The perceived over-regulation of the food sector emerged as the issue which most exercised participants in this research and was identified as the single biggest barrier to the further development of the sector. Other difficulties associated with operating in this sector of the food industry include what is generally seen as the limited food culture, the price-driven nature of the market in the current economic environment, the rising costs of inputs and the time commitment required.



- The experience of participants in this research of the Rural Development Programme (RDP) has been broadly positive and it has, through a range of hard and soft supports, enabled development and improved performance in many of the businesses studied. Although there was some questioning of the level of bureaucracy and restrictions surrounding the grant application process and of the relevance of the programme to some very small-scale enterprises, the local companies which deliver the RDP remain the most appropriate channels through which the majority of rural-based small-scale food enterprises can continue to be developed and supported.
- Any future rural development initiatives such as the **Rural Development Programme** will continue to have a key role to play in encouraging and supporting the further development of this sector of the food industry. Activity and support should focus on three key areas:
 - **Work with individual farm households**, including: pre-commercial animation work; funding of participation in relevant external education programmes (in nutrition, speciality food production, organic growing, etc.); provision of 'short and sharp' training programmes tailored to specific local need; provision of grant support for promising capital projects where such funding is really necessary and at a scale appropriate to the needs and ambitions of the individual business; and continued work with small-scale food entrepreneurs who may never 'scale-up' or require intensive capital support but who contribute to overall rural sustainability and a vibrant local economy.
 - **Work with groups of farm households**, including: organising and facilitating networking events, discussion groups, farm visits, social media, etc. for regional groupings of food entrepreneurs; supporting the development of cooperative efforts such as producers groups; and providing linkages between farm households where there may be potential for collaboration.
 - **Otherwise supporting the development of the local/artisanal food sector**, by: organising activities and events which promote the local/artisanal food sector such as cookery demonstrations, food trails, food festivals, talks and conferences, themed events; supporting the growth and development of farmers' markets and country markets and small-scale or specialist food retailers, including farm shops; supporting food-related tourism initiatives such as food trails, cookery schools, links with restaurants, farm-based accommodation, etc.; and using the credibility gained from lengthy experience in this sector to advocate for further necessary changes which are outside the scope of the Rural Development Programme, such as a review of the regulatory framework for small-scale food producers or an appraisal of the attention given to this kind of activity within mainstream agricultural training programmes.

1. Background and Context for the Study

This discussion paper was commissioned by the National Rural Network to explore the issue of short food supply chains and to inform future policies in this area.

1.1 Introduction

In recent years there has been a renewed interest and a significant growth in alternatives to the conventional food supply chain which allow primary producers and consumers to connect in new and more direct ways. This study adds to the emerging knowledge base on this fast-growing sector of the food industry and rural landscape and more specifically, examines how the sector might be encouraged and facilitated to grow and develop further.

1.2 Overall Context for the Emergence of Short Food Supply Chains

The Irish agri-food sector is a key component of the national economy, accounting for over 6.3% of gross added value, almost 10% of exports, and approximately 10% of employment¹ (Teagasc, 2012)². The sector is also uniquely geographically dispersed, of particular importance in more rural and peripheral areas and increasingly seen as playing a central role in overall economic recovery and development into the future. Ireland has, of course, a small domestic food market and a somewhat limited food culture (Fonte, 2008; Tovey, 2008) with a relatively small proportion of income typically spent on food³. The small proportion of income spent on food combined with high production levels in key agricultural commodities mean that Ireland has largely pursued an intensive and export-oriented model of agriculture in the last half century⁴. In line with international developments, there has also been an accompanying trend towards greater consolidation and rationalisation in other sectors of the food supply chain, with an emphasis on more integrated and highly managed supply chains (Henchion & McIntyre, 2007) and de-localised and often globalised sourcing practices. Within this model, large scale cooperatives and processors are the main markets for Irish produce while most of the more traditional direct and local

links which did exist between Irish producers and Irish consumers or between producers and intermediaries such as local shops, butchers, markets, etc. have been significantly weakened.

However, in more recent years there has been a renewed interest and a significant growth in *alternative* food supply chains which 'short-circuit' the conventional supply chain and allow producers and consumers to connect in new and more direct ways. The rise of farmers' markets, farm shops, community gardens, small-scale producers groups, online speciality food sales, etc. in Ireland and internationally are all indicative of a shift in both consumer and producer behaviour. On the one hand, there has been growing societal and consumer questioning of the methodologies of the conventional food supply chain from an environmental and animal welfare perspective and of the quality, authenticity and even safety of some of the products of that system (Tudge, 2003; Sage, 2007). These heightened concerns have led in many cases to a yearning for provenance, authenticity and traceability in the food system and an increased desire to source food locally and directly from the producer (Bord Bia, 2007). Consumer research by An Bord Bia (2011)⁵ suggests a strong and growing consumer support and demand for local and 'real' food. In 2005, only 18% of consumers surveyed in the Republic of Ireland said buying local food was "very important". In 2011, that number almost doubled to 34% of consumers who indicated buying local food was "very important" and an additional 39% said this was "fairly important".

Small, but increasing numbers of food producers see opportunities to increase the viability and long-term sustainability of their farm enterprises by engaging with – and in many cases, driving forward – this local or quality 'turn' in agriculture. Power imbalances within the conventional food supply chain⁶ and the ever-decreasing share of the food-euro received by the primary producer (Renting et al. 2003; Slee and Kirwan, 2007) are strong 'push' factors to explore farm-level diversification and value-added projects. Other strong push factors are the sharp decline in off-farm employment in recent years in Ireland⁷ and the

¹ When employment in inputs, processing and marketing is included.

² Teagasc website: www.teagasc.ie

³ The average, at around 8% of household expenditure, is one of the lowest in the European Union. Source (Tovey, 2008).

⁴ For example, Ireland in 2011 exported in excess of 90% of its beef output making it the largest beef exporter in the EU and 4th largest in the world. In terms of the destination of Irish food and drink exports in 2011, the United Kingdom at around 43% remained the principal market with sales of just over €3.7 billion. Continental EU markets account for 34% of food and drink exports with a combined value in excess of €3 billion. Source: Teagasc website: www.teagasc.ie

⁵ Bord Bia (2011) *Periscope: Irish Consumers & Their Food*.

⁶ Many commentators have noted the shift in power up the supply chain from primary producers to large scale agri-business and in particular, to large scale retailers.



decoupling of EU support payments from production. As Mulhall (2012) notes, an increasing number of farm households now need to examine internal farm and personal resources with a view to generating the income needed to meet future household needs.

A range of ‘*pull factors*’ have also been identified which combine to persuade some farmers to participate in short food supply chains (Guthrie et al., 2006; Smithers et al., 2008; Bord Bia, 2007). Producers can typically improve financial returns and circumvent the rigours, inflexibilities and power imbalances which can characterise the conventional food supply chain through selling directly to the consumer and minimising the role of the middleman. Farmers will also typically have greater opportunities to interact directly with customers and so gain valuable market information and understanding. Studies of farmer participation in farmers’ markets have highlighted the contribution participation in direct sales makes to the entrepreneurial development of participants (Feagan et al., 2004; Feenstra et al., 2003.). Face-to-face interactions and personal relations have been found to enable, perhaps even force, farmers’ markets stallholders to develop what Hinrichs et al. (2004) describe as a greater reflexivity about the form and content of economic activity. Other studies of direct sales activities have also noted the increased sense of pride and confidence in their work that can come from connecting directly with consumers (Kirwan, 2004; Griffin and Frongillo, 2003) and the increased connectivity and camaraderie with other farmers and food producers which can be found in the networks associated with SFSCs (Kirwan, 2004).

The wider benefits of short food supply chain activity have also been increasingly recognised by statutory and local/rural development actors. Support for SFSCs is very much in tune with the post-productivist rural development agenda, with its increased focus on territorial and place-based approaches to development and the shift towards a more multi-functional approach to agriculture (Horlings and Marsden, 2012). Production and distribution methods associated with SFSC activities are also thought to play a role in reducing the environmental impact of the food system and encouraging small scale and mixed

production methods. The Food Harvest 2020 Report has recognised the importance of encouraging small scale food and artisan producers and suggests the need for further initiatives and supports in this area. In Ireland, support has been provided to individual artisan food producers under the Rural Development Programme via the LEADER Programme for aspects such as research, marketing and promotion. The LEADER Programme has also provided a range of hard and soft supports to broader initiatives which promote and develop the local food sector and the producers within it. These include, for example, support for farmers’ markets under the Village Renewal and Development measure, funding of local food festivals, providing training programmes for artisan producers, development work with producers groups, and funding of the Meat Matters initiative⁸. There is also a growing emphasis on the contribution of local food cultures and local food networks to the tourism mix and to the successful branding of Ireland as the Food Island (Bord Bia, 2007; Grant Thornton, 2012)⁹. Institutions such as farm shops, farmers’ markets, local/artisanal food shops and restaurants are also increasingly seen as having a key role to play in revitalising and enlivening public space, in keeping money circulating in the local economy, and in providing local employment (Lyson, 2004; Pearson and Bailey, 2009).

1.3 Categorising Short Food Supply Chains (SFSCs)

Short food supply chains can be described very simply as the range of food production-distribution-consumption configurations – farmers’ markets, farm shops, producers groups, etc. – which facilitate either a short distance and/or a small number of intermediaries between producers and consumers. Within this overall understanding Renting et al. (2003) have identified three categories of short food supply chains, the potential of each of which will be examined in this paper:

1. **Face-to-face SFSCs** These are the simplest and most direct type of chains where consumers purchase products directly from the producer or processor and authenticity and trust are mediated through personal

⁷ From 58% in 2007 to 51% in 2010. Source: National Farm Survey, 2011, Teagasc.

⁸ This is an inter-territorial project across a number of LEADER companies, the objective of which is to provide training support to small local abattoir owners.

⁹ According to Fáilte Ireland, the overall vision for food tourism is that Ireland is recognised by visitors for the availability, authenticity, quality, and value of our local and regional food experiences which evokes a unique sense of place, culture and hospitality. Source: Grant Thornton

interaction (Renting et al. 2002). The typical means through which these interactions take place include farmers' markets, roadside sales, farm shops and 'pick-your-own'. As Renting et al. note, box schemes, mail order and the growing area of online sales offer possibilities to extend the geographical reach of these direct links.

2. Proximate SFSCs A second category of SFSCs extends beyond direct interaction and involves a range of local institutions which act as intermediaries in some way between the consumer and producer. One set of examples would be local shops and butchers but also more specialised retailers such as whole-food shops, gourmet shops, etc. Another important set of intermediaries and one of significant importance in terms of 'championing' local producers and acting as tastemakers are restaurants, hotels, and cafes etc. which develop relationships with and feature local producers (Duram and Cawley, 2012). Another important type of proximate SFSC which is receiving increased attention is the small scale producers group or cooperative which allows farmers to brand their products collectively under a unique and authentic local brand. Irish examples include the Ring of Kerry Quality Lamb Group and Leitrim Organic Farmers Co-op. Because of their cooperative structure, Country Markets can also be classified as proximate SFSCs. It is these intermediaries – producer's coops, restaurants etc. – which take over the role of guaranteeing product authenticity.

3. Extended SFSCs A third category further enlarges the reach of SFSCs to extended relations in time and space. Here, products are sold to consumers outside the region of production who may have no personal experience of that locality. In most cases products are exported from the region to national markets, but some extended SFSCs may span large distances covering the globe. Examples of these are well-known regional specialities like Parma Ham or Parmigiano Reggiano cheese but also 'fairtrade' products like coffee and tea. These kinds of networks are still 'short' food supply chains: it is not the distance over which a product is transported that is critical, but the fact that it is embedded with value-laden information when it reaches the consumer, for example, printed on packaging or communicated at

the point of retail. This enables the consumer to make connections with the place/space of production and, potentially, with the values of the people involved and production methods employed. The Irish food industry is at a relatively early stage of exploiting the potential of this type of SFSC.

1.4 Current Interest in SFSCs Amongst Irish Farmers

Despite a growing local food sector, the great majority of Irish farmers have not engaged with this dynamic and remain price-takers in commodity markets rather than price-setters in short food supply chains (Macken-Walsh, 2009). Recent figures (Meredith, 2011) suggest that just 4.1% of Irish farmers have diversified and out of these, only 0.4% have gone into adding value to food. National Farm Survey data from 2008 demonstrates clearly the very limited extent to which the notion of direct selling has penetrated the consciousness or behaviour of the Irish farming population. Of (849) farmers surveyed, only 5% said they would even consider producing a product or selling existing products in a farmers' market or farm shop¹⁰.

A variety of reasons have been put forward for this apparent estrangement of conventional indigenous farmers from the value-added or differentiated food sector. The dominance and (qualified) success of the commodity-based and export-oriented model of agriculture is perhaps also one of the strongest, though most underappreciated barriers to the development of a more vibrant and inclusive local foods sector. Quite simply, the great majority of what is produced in Ireland does not readily nor easily lend itself to direct selling, demanding as it does some level of processing, refrigeration, etc. (Macken-Walsh, 2009). Further, substantial financial and other investments have been made in existing farm systems, sometimes over generations of farm operators, investments which cannot easily or blithely be overturned (Hennessy and Thorne, 2005). In their study of farmer engagement with the Rural Development Programme (2007-2013) Heanue and Macken-Walsh (2010) also suggest that a range of bureaucratic and financial obstacles, such as compliance with LEADER eligibility criteria, match-funding requirements, etc. have acted as barriers to greater engagement by farmers in entrepreneurial

¹⁰ Of those who said they would not, the most common reasons given were: 'not interested' (35%), followed by 'no suitable products' (15%), 'no time' (22%), 'too old' (13%), 'enterprise mix unsuitable' (7%) and 'not profitable' (2%). The responses were more or less consistent across all farm-types.



elements of the RDP, perhaps the most important potential source of support.

Macken-Walsh's important study of barriers to participation of farmers in local food movements (2009) suggests that farmers' occupational preferences are strongly rooted in forms of cultural and social capital that can be estranged from the consumer driven economic activities promoted by rural development actors. The perception of food markets and the production of artisan foods as being '*not for farmers*' and '*not suitable for farmers*' was prevalent in the data collected among farmers in Macken-Walsh's research. Heanue and Macken-Walsh (2010) also suggest that a large proportion of farm-holders are unlikely to have the necessary *expertise* in processing, branding, marketing, advertising and distribution activities to participate fully or independently in more entrepreneurial activities. A further barrier to farmer participation may lie in the ownership and orientation of the local foods movement to date. As numerous studies have revealed (Moore, 2003; Tovey and Mooney, 2006), local food initiatives have been influenced strongly – and often led – by incomers to Ireland, by people not from traditional farming backgrounds and by those who see themselves as part of a consumer movement as much as a rural producer movement (Tovey and Mooney, 2006).

How do we encourage and facilitate greater farmer participation in SFSCs than has happened to date? The capacity and willingness of farmers to engage further with the local foods dynamic will depend on both the **internal** and **external** resources available to the farm household¹¹. The **internal** resources include the stock of skills, knowledge and entrepreneurial capacity, the ability to provide for succession, the physical assets and infrastructure, the access to financing and credit, the location of the farm relative to markets, etc. As Meredith et al. (2012) note, many of these factors are themselves dynamic and the potential of the farmer and farm household in particular changes with age, education, background, training, etc. Previous research undertaken by Gilg and Betterhill (1999) amongst direct sellers in rural France point to the overarching importance of background and education in understanding family farm decision-making, followed by attitude to profit. The *vente directe* farm families in their study also tended

to have distinctive or unorthodox attitudes towards farming related to their personal histories or educational background were more likely to have worked or come from outside the farming world, and to have spouses from non-farming backgrounds.

As part of this study, we interview a range of Irish farm households who *have* taken the decision to engage (to varying degrees) with SFSCs. This allows us to explore their particular decision-making process and development journey and to explore which factors (such as educational status, lifecycle of the household, location, type of farm, etc.) may be associated with a shift towards a more alternative approach to agriculture in an Irish context. One of the other aims of the study is to demystify the process of participation in SFSC's by presenting a number of illustrative and detailed examples of farmer participation. We also explore whether more *collective* approaches to engaging with the local foods sector (small scale producers' groups/cooperatives, networks of producers, etc.) have a role to play in enabling more '*ordinary*' farmers than heretofore to tap into the opportunities associated with SFSCs in a way that retains their occupational identity, utilises the skills they actually possess and is socially and culturally acceptable to local farming communities¹².

The **external** resources available to the farm businesses most obviously centre on the rewards and incentives provided by the marketplace (Meredith et al., 2012). However, as Heanue and Macken-Walsh (2010) note, there are usually limits to a farm's internal capacities, resources and competence which require the farm household to look externally to a range of actors for help in innovating and/or diversifying. These external actors include suppliers, customers, consultancies, other farmers, etc. and non-firm entities such as advisory services, funding agencies, government departments and education providers. It is outside the scope of this study to examine in significant detail every external actor or to speculate as to how the market for the products associated with SFSCs might be built. However, it does focus on how the Rural Development Programme – a key external influence on and driver of rural entrepreneurship – might encourage the growth of SFSCs and greater farmer participation in these new ways of selling than has happened to date.

¹¹ Studies suggest that contemporary rural development initiatives need to move beyond targeting male farmers in isolation from their spouses and families and to adopt a more holistic family approach to encourage participation (Heanue and Macken-Walsh 2010). Accordingly, this present research takes the 'farm household' rather 'the farmer' as the unit of study.

¹² The growing body of literature on Agriculture of the Middle is of particular relevance here. See, for example, Macken-Walsh, A. (2010) Agriculture, Rural Development and Potential for a 'Middle Agriculture' in Ireland, Teagasc Rural Economy Research Centre Working Paper Series, Athenry.

2. Research Aim and Methodology

The overall aim of this study has been to add to the emerging knowledge base on this fast-growing sector of the food industry and rural landscape. Specific objectives include:

- To examine the overall experience of participants in short food supply chains, including:
 - Motivation to participate in SFSCs;
 - Development process or journey of participants;
 - Benefits of participation in SFSCs;
 - Difficulties experienced;
 - Experience of carrying out SFSC activity within Irish farming culture; and
- Future plans for SFSC activity and otherwise;
- To assess the level and type of SFSC activity amongst participants and to identify the positives and negatives associated with each individual type of outlet;
- To identify the skills and experience associated with SFSC activity;
- To examine the experience of the participants of the Rural Development Programme to date and to determine the lessons learned for future programmes/policies;
- To identify the kind of supports future rural development initiatives could provide to further exploit the potential presented in this area and encourage greater farmer participation than heretofore; and
- To identify wider changes to the external environment which could be introduced to support further development of the sector.

2.1 Methodology

This research utilised both desk research and primary research amongst farmer participants in short food supply chains. The latter research involved semi-structured interviews with a sample of 15 farmers¹³ who were chosen using purposive sampling. The goal was to achieve a somewhat representative mix of participants with a wide range of experience but the final sample included; a number of mature, successful producers (i.e. those with a length and depth of experience in short food supply chains), a number who highlight the possibility (or necessity) of assembling a *range* of outlets, a small number operating at a relatively simple or small-scale level and a number of farmers who are simultaneously continuing with commodity production and also participating in short food supply chains. Although a reasonable geographic spread was attempted, a more important spatial consideration in this area of research is proximity (or otherwise) to population centres and high-quality intermediaries. The final sample reflected the need to capture the range of experience in this regard.

The final sample of 15 was arrived at using the knowledge and experience of a range of sources, including staff from a sample of LEADER companies and the lead researchers themselves. Interviews were conducted by phone in all but two of the cases where they were conducted face-to-face. Participants were sent a copy of the Interview schedule (See Appendix 1) by email prior to interviews.

¹³ The basic unit is the family farm; the participant in the research may be any representative of that farm.

3. Findings and Analysis



The findings and analysis section is divided into four sub-sections:

- Section 3.1:** Profile of Participating Households and Operations, Motivation and SFSC Activities;
- Section 3.2:** Benefits, Challenges and Skills Associated with SFSC Activity;
- Section 3.3:** The Environment in which SFSC Activity Takes Place; and
- Section 3.4:** Future Plans for Participating Households.

3.1 Profile of Participating Households and Operations, Motivation and SFSC Activities

Fifteen farm families participated in the research and a brief profile of each is provided.

3.1.1 Profile of the 15 participating farm households

Lindy O'Hara produces a range of venison products from the family deer farm at Coopershill in Co. Sligo. She has been in operation for 18 years and sells on-line, seasonally through Sligo Farmers' Market and to a range of specialist retailers and selected restaurants throughout the country.

Kathleen Nerney produces and sells organic Adora Flax Oil from the family farm in Ballyroan, Co Laois. This innovative and relatively new product – the only one of its kind produced in Ireland – is largely sold through specialist retailers and health food shops throughout the country.

Orla and Sean Clancy operate a mixed 235 acre organic family farm in Cloghan, Co. Offaly from which they have been selling their own artisan food products for over 10 years. They sell meat and other products directly to consumers via a range of outlets, most notably their own catering van 'The Organic Kitchen' which they bring to festivals and events throughout the country.

Tom Clancy is a former dairy farmer from Ballycotton, Co. Cork who has been selling high quality poultry and eggs directly to consumers for the last 6 years. He sells small amounts to selected restaurants and

hotels in the local area but his main outlets are three farmers' markets in the Cork area. He also grows some winter wheat, barley, maize, etc., largely for sale into conventional channels and operates a farm-based holiday let.

Nigel and Carol Harper produce luxury farmhouse ice-cream (Cramers Grove) from their 5th generation family dairy farm in Co. Kilkenny. The ice-cream is sold through a range of restaurants and specialist retailers from Cavan to Cork. The ice-cream business has been up and running since 2006 and operates alongside an extensive conventional dairy operation.

Padraig Moran runs Coorevin Farm in Borrisokane, Co. Tipperary, a beef and sheep enterprise which is also a REPS 4 Demonstration Farm. Padraig runs a very successful farm-based education centre but has also been selling his own lamb directly to the public from the farm-gate for the past six years.

Paddy Byrne is an organic farmer whose family has farmed in Skerries, Co. Dublin for four generations. His main product areas are organic eggs, vegetables, fruits and added-value products such as jams, chutneys, etc. He sells at the farm gate, through farmers' markets and to a small number of restaurants and since 2010, has grown for a Community Supported Agriculture group in Skerries.

Brendan and Derek Allen run Castlemine Farm in Co. Roscommon and have been selling directly to the public since 2008. They produce their own high-quality meat for sale through a range of outlets. They have a very successful farm shop in Roscommon town, but also sell at a small number of farmers' markets and through a strategic partnership with a distributor, to a number of restaurants and outlets throughout the country. They currently employ 10 people.

John Tait has been involved in farming his whole life and for the last number of years, has specialised in producing high quality Aberdeen Angus beef from the family farm in East Cork. John sells through a number of restaurants, including Ballymaloe House and directly via online and phone sales to customers throughout the country.

Dominic Gryson has a small farm in Co. Meath and for a number of years produced goat's milk and a range of goat's milk products, including cheeses, ice-cream, butter and yoghurt. These products were sold through

a variety of outlets, including farmers' markets, a large supermarket chain, local shops and other cheese makers. For a variety of reasons, Dominic is not currently producing for the market but hopes to do so again in the future.

Joy and James Moore run Oldtown Hill Bakehouse from their dairy farm in Co. Kilkenny and produce a range of baked goods including bread, scones, cakes and donuts. In business since 1999, they sell through a wide range of retailers throughout Leinster and have four vans on the road. They currently employ 18 people and have recently opened their own bakery shop in Kilkenny. They also maintain and hope to further expand their conventional dairy operation.

Claire Winters has been an organic grower on her smallholding in Co. Sligo for a number of years and has recently started to sell her organic produce directly to the public. She specialises in high-value products such as salad leaves, herbs, tomatoes, garlic, etc. which are grown in poly-tunnels throughout the year. She operates a small box-scheme, sells to a small number of specialist local retailers and hotels and hopes to start selling at a local farmers' market soon.

Tom and Carol Murray have been operating Earth Angel Organics from their own mixed smallholding near Fermoy in Co Cork for almost a decade. Their product range includes organic vegetables, jams, chutneys, artisanal cheeses and eggs. They currently sell at five farmers' markets, one country market and at the farm gate.

Gerry Fitzsimmons operates a suckling to beef enterprise at his 38 acre farm in Mullahoran in Co Cavan. He is an organic producer since 2001 and specializes in the more traditional breeds of cattle. He has in the past sold directly but currently sells most of his beef to Irish Organic Meats who in turn sell directly at a number of farmers' markets throughout the north west of the country.

Oliver Clooney from Co. Laois grows and sells potatoes and vegetables and has been in the business for 40 years. Together with his wife and son, they sell to a range of regional retailers, to a small number of restaurants and hotels, at the farm gate and at two farmers' markets. Oliver also sells cattle and sheep into factories.

Seven of the fifteen farm households in this study came from Leinster, four from Munster, three from Connaught and one from Ulster. Thirteen out of the fifteen households had inherited the core farm/land from family members, usually parents. The two remaining participants had bought their land with a view to growing and selling their own produce and in both cases, the holdings are less than 15 acres.

The decision to adopt the '*farm household*' rather '*the farmer*' as the unit of study for this research has been validated by the profile of the participants which has emerged. All but one of the participating households has involvement by at least two members in SFSC activity, although the level of involvement obviously varies. In six cases, a minimum of two members of the farm household are employed full-time in the enterprise¹⁴. In the remaining households, the involvement of other family members varies from skills-based support around particular aspects of the business (for example, web-design, or IT or marketing) to more general supplementary labour, such as helping run the production side of the operation or filling in at farmers' markets or doing deliveries.

Eleven of the participating farm households had at least one member who had been involved in farming throughout their lives, although in a small number of cases this may only have been on a part-time or casual basis until the death or incapacity of parents. Four of the participating households have come into agriculture and food production in the last decade through either inheritance or their own purchase of land.

Two of the interviewees describe themselves as having '*just hands on*' experience but no formal qualifications. Amongst the remaining thirteen households, there are ten members who could be described as having particularly relevant qualifications (i.e. in agriculture, horticulture, speciality food production, etc.). There are a wide variety of other educational backgrounds and qualifications evident amongst the farm households in this study. There are, for example, three nurses, an engineer, two scientists, an accountant, and a graphic designer.

Within the households included in this study, there are seven where one member has not worked outside of farming or food production at any stage. However, in

¹⁴ In most cases, this is a husband and wife team, but in a small number of cases, it is siblings or parents and children.



only two of these has there not been someone else within the household with a previous or current 'outside' job or work experience. Therefore, in thirteen out of fifteen cases and in line with the qualifications described above at least one member of the farm household has had significant work and life experience outside of agriculture and food.

Although participants were not directly asked their age, it was possible to extrapolate approximate ages from conversation. Although it appears that none of those interviewed was less than 30, approximately half were under 45 and half over 45. In the case of approximately half of the latter cohort, there was involvement by one or more adult children in the enterprise.

3.1.2 Profile of Farm Operations

Of the fifteen farm-based operations participating in this study, six are involved in the meat sector (mainly beef and lamb, but with one producer of venison) and three in horticulture (mainly vegetables, but with some fruit and some added value produce, i.e. jams, chutneys, etc. based on the core produce). There is one producer each of baked goods, ice-cream, cheese, flax seed and oils, and poultry/eggs and two operations which could best be described as mixed due to the very wide range of products they produce and sell.

Ten of the participating farms have little or no sales of produce into commodity chains, although many would have done so in the past or alongside their more value-added activities while getting the latter established. A small number of the beef and lamb producers would still very occasionally sell into conventional channels if they had an over-supply of stock or a shortage of fodder. The remaining five households do routinely sell one or more farm products into commodity chains but in all cases, this is a separate and distinct area of activity from their work in SFSCs. For example, the on-farm bakery included operates alongside a conventional dairy operation where milk is sold to a conventional processor.

Six of the producers in this study are certified organic. Although participants were not asked directly what acreage they held, it could be discerned that a majority of holdings could be described as small and/or marginal in terms of land quality. Six of the farms could be described as large/commercial scale operations or are in areas with very good quality land.

3.1.3 Motivations to Engage in Short Food Supply Chain Activity

Given the heterogeneous nature of the households which participated in this study, it is unsurprising that a wide range of motivations underpin the decision to engage more directly with consumers. For a substantial number of households in this study the method of selling is inextricably linked with, and to some extent, determined by the distinct nature of the products they have to offer. For those selling artisanal, organic or premium or speciality products at a relatively small scale, more direct sales are the natural and more financially rewarding route to their necessarily limited customer base. The journey of Gerry Fitzsimmons, an organic beef producer in Co Cavan, is typical;

"I was always interested in biodiversity and from when I went organic, I started selling directly to local families... It's the breeds (Aberdeen Angus and Shorthorn and crosses) and the organic status that determines the sales premium and the choice of outlets.... I would always say that people have gotten away from where food comes from and I like to be part of a different, I suppose more sane way of doing things."

A further factor mentioned by many participants as both a motivator for and benefit of SFSC activity is the level of control it returns to the primary producer. As Orla Clancy of Clanwood Organic Farm in Co. Offaly put it;

"The organic growing probably came first but the main motivation was to have some control over pricing and income, to not be subject to the whims of prices being offered by factories and to control what's happening with what we produce."

The limitations of conventional agricultural systems and the requirements to substantially increase production envisaged under Food Harvest 2020 also 'pushed' some households in to exploring other options for their farms and/or their products. Tom Clancy from Co Cork was a dairy farmer who found himself unable to expand his herd due to the fragmentation of his farm and the investments required under the Nitrates Directive. Instead, in addition to tillage, he began selling poultry and eggs directly to consumers and quality intermediaries. Paddy Byrne, an organic vegetable grower in North County Dublin, used to operate as a market gardener at a commercial level but increased mechanisation and competition led to what he

describes as a “race to the bottom”, where “the guy with 200 acres was taken over by the guy with 500 acres and in turn by the guy with 1000 acres.” For him, the only way for him to go was back to operating a mixed, small-scale operation and crucially, selling directly to the public; “The market turned the corner...there are opportunities there to compete on quality and through direct sales, with no middleman.”

As might be expected, the desire to increase the income and improve the economic sustainability of the overall farm enterprise was a primary motivator for many households. For meat producers in particular (and even for those producing within quite conventional systems) there was a strong desire to improve the margins on each animal over and above the prices typically offered by the factories. Brendan Allen of Castlemine Farm in Co. Roscommon explained his motivation to start selling directly and ultimately, to open a farm shop; “I believed that the Irish family farm could make a living by adding value, by becoming price setters rather than takers... I wanted to take some control back. I saw my father struggling his whole life and my brother disillusioned at an early stage and I knew that it could be different.”

A significant number of the participants in this study might be said to come from an entrepreneurial background or are of a naturally entrepreneurial ‘bent’ and were motivated by the desire to run their own farm-based business. Kathleen Nerney, the owner of Adora Flax Oil described her journey;

“I’m from an entrepreneurial background and have been self-employed most of my life. We had a bottled water operation on my own home farm.... I studied nutrition and got to know about flax oil and the huge benefits of it. Though no one was growing it in Ireland, I thought there was definitely a market for it... I thought let’s try and grow some.... I wanted to produce something good, something native that would be suited to Irish people and that could replace imports.”

Similarly, Nigel Harper of Cramers Grove Ice-cream described the motivation of himself and his wife to set up a farm-based business alongside their dairy operation;

“We started doing the ice-cream in 2006. We had just gotten married and wanted to do something together. My father was still involved on the dairying side and I had the idea of the ice-cream in the back of this mind

since doing modules on food science at agricultural college... it was always an inkling I had.”

Equally however, a small number of participants would describe themselves as having ‘fallen into’ direct sales. Joy Moore of Old Town Hill Bakehouse described how she initially simply took over from her mother-in-law in supplying brown bread and scones to local shops when the latter took ill. Along with her husband she now employs 18 people and both supplies baked goods to retailers throughout Leinster and operates a shop in Kilkenny. John Tait in Co Cork was breeding Aberdeen Angus cattle and although he had a desire to add value, only started to do so after a chance visit to Ballymaloe began a conversation with them about supplying consistent, good quality Aberdeen Angus beef. He began to supply them with 1 animal every 3 weeks and has pursued some other options since, including a freezer box scheme and sales to another restaurant.

For some, the choice of this kind of activity appears strongly linked to a desire to provide farm-based employment for more than just the ‘farmer’ and to establish a sustainable family business which fits in with and is inextricably part of family life. As Joy Moore of Old Town Hill Bakehouse explained;

“Before I started baking I was nursing but the hours were very erratic and uncertain; I wanted to spend more time at home around the family, for continuity and for work-life balance.... Also the idea of being self-employed appealed. My own family had a piggery and did their own label pork and bacon; it was what I grew up with so I suppose I wasn’t too daunted.”

3.1.4 Level and Type of Short Food Supply Chain Activity

Using the earlier categorisation developed by Renting et al.(2003), we can subdivide the sales activities of the households participating in this research into face-to-face, proximate and extended SFSCs (Table 1).

Although the participants in this research clearly assemble and juggle a wide range of outlets for their products, most operate within the categories of face-to-face SFSCs and proximate SFSCs. Only four of the participating households have any involvement in more extended SFSCs. Within these categories, the most



Table 1: Type of Short Food Supply Chain Outlets for Producers

Type of Outlet	No. of participating households who sell via this type of outlet
Face-to-Face SFSCs	
Farmers' Markets	8
Farm-gate/farm shop	6
Online	4
Box Scheme	3
Community Supported Agriculture	1
Catering van	1
Proximate SFSCs (Local/Regional)	
Restaurants, hotels	8
Specialist retailers (gourmet, health food shops)	5
Via specialist distributor	4
Local shops, butchers, etc	3
Larger, non-specialised retailers	2
Country Market	1
Producers Group	1
Extended SFSCs (National/Export)	
Via specialist distributor to variety of distant outlets	4
Specialist retailers	3
Restaurants, hotels	3

popular outlets are clearly farmers' markets and local/regional restaurants and hotels. These are followed by sales via farm-shops or at the farm gate, sales to speciality retailers, sales via specialist distributors and online sales. Smaller numbers are engaged in the remaining types of outlet.

Perhaps the overwhelming finding with regard to short food supply chain activity is the sheer number and range of outlets into which the great majority of farm households sell. Five sell into two different types of outlet, another five into three different types and the remaining five into four or more types. Even within each 'type' (e.g. farmers' markets or restaurants) the household will typically sell into a number of these. For example, Tom Murray in Co. Cork who produces a wide range of organic goods from his small-holding sells at five farmers' markets and one Country Market, in addition to some sales at the farm gate.

Many of the participants in this research spoke of the need to spread risk and not rely overly on either one type of outlet or indeed one individual market or restaurant or shop, however successful. One shared his experience of having based his production levels entirely on an agreement with a specialist processor who subsequently did not take his produce. As another participant noted;

"I've come to the conclusion that the notion of big scale, of making the big deal, is a non-runner...you have to spread your risk."

Participants also emphasised the necessity of remaining flexible and constantly alert to shifts in consumer demand and behaviour and to trends in the wider food industry. A type of outlet that was once a core part of the business may decline in importance and value while others previously unexplored may need to be examined.

The experience of Oliver Clooney, a vegetable grower in Co. Laois is instructive:

"For us 20 years ago, hotels and restaurants were a bit thing but they want their vegetables chopped and ready for the pot now and this has really affected that end of the business. We've just a few now and they're not that significant in the overall business."

The overall conclusion to be drawn from the above figures is that every farm household embarking on SFSC activity assembles a mix of outlets which 'works' for them and their operation. The factors which will determine the most suitable mix for each household include the location of the farm (particularly proximity – or otherwise – to a consumer base) the type of produce, the labour available to the enterprise, the personal preferences of the household with regard to selling, the level of ambition for the enterprise and the general market conditions. The comparison of the main types of outlets detailed below therefore is deliberately broad and cognisant of the fact that a type of outlet which is very successful for one farm household may offer poor returns for another. One of the most important skills required to operate in this environment may be the ability to choose and balance the correct mix of outlets and to be flexible enough to adapt as conditions shift.

3.1.5 Comparing Different Types of Outlet

The main outlets are outlined to provide an insight into the variety of routes to market pursued by producers.

3.1.5.1 Farmers Markets/Country Markets

There was general agreement amongst the participants in this research that farmers' markets (and by extension, Country Markets) have some quite specific advantages, particularly for those starting their journey into SFSCs, those operating at a relatively small scale and those selling particular types of products. Chief amongst these is the opportunity the market form provides to interact directly with and learn from consumers. Although he no longer sells at farmers' markets, Nigel Harper of Cramers Grove Ice-cream describes markets as "a stepping stone" and an "excellent source of market research". As he puts it, "we learned how to sell there". Brendan Allen of Castlemine Farm in Co. Roscommon agreed with their value as both a means of conducting immediate market research but also as a means of adding authenticity to the brand. As we will see later, the more direct types of outlet such as farmers'

markets also typically have a strong social element and allow producers to interact with customers and other stallholders. Oliver Clooney, a vegetable grower, shared his thoughts:

"I find the farmers' markets very positive, they're absolutely brilliant. I meet a lot of nice people and it's a social thing. I'd have some of the same customers from when I first started. Dealing with the retailers has become all business and the markets are different that way."

For some participants in this research, farmers' markets are and will more than likely remain fundamental to their operation. For one participating household, farmers' market sales constitute the majority of their income and a further seven sell at one or more markets. Most of these participants referred to the importance of the income from farmers' markets to their cash flow, particularly compared to some other outlets.

Although there was general agreement amongst participants in the research that "the good markets are good" some questioned the level of income which can be derived from many markets, especially in the context of the time commitment required. The following comments were typical:

"I wouldn't fancy going back to the farmers' markets now, I think they have run themselves out. It's particularly difficult when you're selling things with a short shelf life."

"I don't think the money is really there to be made in farmers' markets and the labour commitment is huge.... But they are a good advertisement point."

"The way farmers' markets in Ireland evolved is that they are very expensive for consumers. You often have one or two core stalls making money but there are a lot of tyre-kickers too. It should be more like on the Continent where people are coming out with armfuls of produce.... here it's more of an experience for consumers."

"The main drawback is that you have to be there 52 weeks of the year, they are very time-consuming. Also, people think you should have supermarket prices and I get tired of telling the same old story to people."

Overall, and notwithstanding the above, farmers' markets appear to remain particularly relevant and valuable for two different types of farm households:



- those selling less specialised and/or perishable products (e.g. vegetables, eggs, meat etc.) at a relatively small scale and usually within their own region; and
- aspiring food entrepreneurs wishing to test and refine both their products and their own sales and marketing skills in a relatively low risk and low cost environment.

3.1.5.2 Restaurants and Hotels

There was a consensus amongst those with experience of selling into restaurants that they can be a profitable and prestigious outlet for produce, but that sales to them have been hit particularly hard in the current economic climate. As Nigel Harper put it;

"Selling into restaurants is great when things are going well, but when it's hit, it's hit hardest."

Apart from actual restaurant closures, participants noted a decline in the volume required and for some of the more specialist and high-end producers, a reorientation in the produce sought;

"Restaurants have fallen by the wayside somewhat... they're saying it's too expensive and are only buying small quantities. In the good times, restaurants were prepared to buy the more expensive meats and cuts, they're less inclined now."

Lindy O'Hara, Coopershill Venison, Co. Sligo

Participants also noted that there is typically a high turnover of chefs and a subsequent difficulty with maintaining business relationships. Tom Clancy, a poultry and egg producer in Co. Cork also commented;

"I sell to only a small number (of restaurants) and only those I know and trust. There is a problem with some chefs claiming the produce is yours on the menu when it's not. Honesty and integrity are the big thing for me. I like to have total control and I'm very slow to diversify out where I don't have that."

A number of meat producers also noted that while they may get restaurants to take their produce relatively easily, they will usually only be interested in the more prime cuts;

"Maximising the carcass is the main thing with animals. I could sell to more restaurants but they only want the prime cuts."

John Tait, Aberdeen Angus beef producer

Overall, restaurants remain a popular outlet and a high-profile part of the sales and marketing 'mix' for many producers. However, they have some significant limitations, particularly in the current economic climate.

3.1.5.3 Retail

Although the retail landscape is clearly very diverse with significant differences in particular between the small-scale, more specialist retailers and supermarkets, the overall picture which emerged in this research is of an increasingly pressurised and difficult environment in which to do business.

The experience of dealing with small scale local and more specialist retailers is broadly positive in terms of the willingness of store owners and managers to stock artisanal or specialist products. As Kathleen Nerney of Adora Flax Oil put it;

"My experience has been largely positive...I've had no problem really with getting shelf space. It's a high quality product and it's Irish, which is a big thing at the moment."

Claire Winters, a producer of high-value salad leaves and vegetables in the Northwest of the country, has found that although the more specialist retailers may have a loyalty to those already supplying to them, there are still opportunities if a producer can fill supply gaps or provide more novel or unusual products. She has also found that the relationship with such retailers is generally supportive and that feedback is usually constructive and mutually beneficial. However, there was also a general agreement amongst most participants that these types of retailers, like others, are finding trading conditions increasingly difficult. From the producer's point of view, this can result in payment delays, as one participant recounted;

"In general retailers are finding it very hard and it is a constant effort you have to put in with them. Since the start of this year in particular, it's harder to get paid... there has been a noticeable increase in difficulty over time. Also, there's no comparison between returns from city outlets with high footfall to that of the towns....they are really struggling."

Although there was a level of understanding of the difficulties facing smaller and more specialised business owners, the feedback on dealing with larger supermarkets was largely negative. There appear to be

significant and ever-increasing difficulties with getting paid, with time-lines of three to five months reported. The following comments were typical;

"Dealing with retailers is getting more and more difficult. Credit terms are being stretched out, yet the suppliers are more demanding with many wanting payment on delivery. It was a very simple system setting out, but now we are chasing money."

"The shops are looking for a wider margin all the time and have got much slower to pay, anything up to 3 to 5 months."

In addition to payment difficulties, those with lengthy experience of dealing with retail noted a number of other trends which have created difficulties for small-scale food producers. Trends such as the on-going shift towards central distribution, the increased preference for dealing with large growers, processors, etc., the shift towards own-brand goods have all squeezed out or are creating an ever-diminishing share of shelf-space for the kind of producers who took part in this study. Again, the following stories are typical;

"If I was starting out now, I wouldn't have a chance of getting into supermarkets. But I've been selling into them for years and customers know and look for my products."

"There's a growing trend in the likes of X to push their own brand stuff, with a lot of management decisions not being made locally. We thought we might be pushed out over time and have looked for a Plan B."

"I tried selling meat into X and it looked like it would happen but in the end they said that meat processor had a problem with it being on the shelf alongside their stuff. So, they wouldn't take it off me in the end....you just can't trust the supermarkets."

Some of those who have succeeded in getting their products on supermarket shelves and who might themselves have once seen this as a very positive step for their business now appear quite negative and jaded by the experience;

"I don't enjoy the shop sales now, it's all business these days and nothing more...there's much less goodwill than there used to be. There's only one feedback you get and it's if there's something wrong. There's no flexibility and it's very rigid, all it is to me now is just a cheque at the end of month."

"People think it's all about getting into supermarkets but success brings its own problems. We are listed with X now but we haven't pursued it and we may not do so. We have heard too much about how they are to deal with."

"We only deal with good places now with whom we have established relationships and where we know we'll get paid. We've learned not to be too keen to jump at every chance when someone says they'll supply you."

These particular participants are at least to some degree now shifting 'back' to direct engagement with consumers via their own retail operation or farmers' markets. Such a shift has been found to deliver both financial benefits "cash is king" but also to return a sense of agency to the producer.

3.1.5.4 Farm Shop/Farm Gate Sales

Two of the participants in this research have their own retail operations, both in towns proximate to the farm. Old Town Hill Bakehouse opened their own bakery shop in Kilkenny towards the end of 2012, in a sense, going 'back' to direct selling after many years of only pursuing sales via other retailers and Castlemine Farm have a farm shop in Roscommon Town. In both cases, the shops have been highly successful;

"The shop has worked well, it's returning some control to ourselves. It also really helps with cash flow and you can minimise waste." Joy Moore, Old Town Hill Bakehouse

"The shop in Roscommon is definitely the easiest and the most successful of the things we do."

Brendan Allen, Castlemine Farm

The remaining four producers who pursue this option generally have more informal sales at the farm gate, where customers call in or arrange to collect produce. In addition to the income derived from this – with minimal financial inputs from the producer, having people visit helps promote the farm and its produce and gives consumers a deeper insight into the farm operation.

A number of participants have considered opening their own on-farm shop but have ultimately concluded that it would not be financially viable;

"We have thought about an artisan shop or a farm shop but compared to likes of UK, there's a very small market." John Tait, Aberdeen Angus beef producer



"If we had our own farm shop, the premises and stability would be there but I think we would be a bit too rural, you would need to add something to it, especially with rising fuel costs. People wouldn't come all the way out here just to buy food."

Tom Clancy, poultry and egg producer

Overall, given the small size and widely dispersed nature of the Irish market, it appears that on-farm shops might only be a viable option for those living in a peri-urban area or where the producers have a complementary operation such as a cafe or pet farm which will attract a sufficient level of trade. However, the option of opening a farm shop in a more urban area but in proximity to the farm appears to hold more promise.

3.1.5.5 Online Sales

There was a level of agreement amongst the participants in this research that an online presence is important, with an up-to-date and interesting website and judicious use of social media playing a part in promoting the business. The journey of Clanwood Farm is instructive;

"We have re-branded recently and have new packaging and an improved website and it's made a big difference. People are really noticing it... we find you don't have to work as hard at selling it."

Orla Clancy, Clanwood Farm

However, given the nature of the products concerned, purely online sales remain quite limited. Most of those who sell online noted that while customers may come to them via their website, most will still usually phone to discuss with the producer exactly what they want and to arrange delivery.

3.1.5.6 Specialist Distributors

Specialist distributors appear to have a very important role to play for those with more specialised products and/or those wishing to sell beyond their own locality and into more extended SFSCs. Those with more specialised products may simply be unable to sell at any kind of volume without going down this route because there isn't a sufficiently large local market for what they produce. Those businesses wishing to access markets outside their locality will, for purely practical reasons, also usually need to work with a distributor;

"The single most difficult thing for us is distribution so we have a strategic partnership with a high-end distributor

who sells into restaurants in Dublin and other places."

Brendan Allen, Castlemine Farm

Beyond their distribution function, specialist distributors will also usually bring market access and knowledge to the relationship;

"Having a distributor is absolutely key, they have the contacts."

Lindy O'Hara, Coopershill Venison

"Restaurants don't necessarily want to deal with lots of small suppliers...cold-calling them is very difficult especially outside of local sales. The distributor already has the relationship with clients. We very much work with the distributor... he tells us what works best, what the customer wants. He is a source of market intelligence for us."

Nigel Harper, Cramers Grove Ice-cream

Some of the participants in this study could be described as reluctant converts to the use of distributors; while they might have originally envisaged carrying out all of their sales directly and personally, the reality was that this was not feasible. Nigel Harper's experience encapsulates this journey;

"We did want to keep as much control of the supply chain as possible and we recognised the importance of personal service but we came up against major chain of supply issues... As it turns out, middlemen have an important role to play. You have to find someone you trust... they are hard to come by and it's hard to cede control, but you have to."

3.1.5.7 Catering Trailer

Although only one participating farm household operates a catering trailer, it is of interest given the particular advantages but also risks associated with the investment. Clanwood Farm operate a catering trailer from which they sell their own cooked meat products at festivals and events throughout the country. According to Orla Clancy of Clanwood, it is certainly the most lucrative of their outlets with high margins and the capacity to add value relatively easily. For example, they can charge an extra euro for a fried egg on a burger. On the other hand, it is highly seasonal and the cost of a pitch at a major event is usually very high. As Orla puts it; "with charges of up to 1000 euro, you have to shift serious volume to make money."

3.2 Benefits, Challenges and Skills Associated with SFSC Activity

While there are many benefits for producers associated with SFSCs, certain skills are required and challenges must be met.

3.2.1 Benefits and Advantages Associated with Participation in SFSCs

Participants in this research detailed a range of benefits associated with this kind of economic activity. Foremost amongst these are the increased margins generally achieved when dealing directly with either end-consumers or quality-focused intermediaries. The experience of Padraig Moran of Coorevin Farm is instructive; he currently achieves a premium of 35% on his lamb over and above what he would achieve from the factory. Although his lamb is raised on grass and clover and is from a Bord Bia approved farm, it does not necessarily have the specific qualities often associated with higher margins, such as organic or rare-breed. The improved margin is achieved primarily through the method of sale, i.e. cutting out the 'middle-man' and selling directly to consumers, but also through the 'good name' and local sales efforts of the farmer himself. The more direct types of SFSC activity (i.e. sales at farmers' markets, farm shops, etc.) also help hugely with regular cash-flow, particularly for those households where other income sources, such as the Single Farm Payment, grain cheques, milk cheques, etc. may be more infrequent. Oliver Clooney, who sells vegetables and potatoes through both local and regional retailers and farmers' markets described his experience;

"The farmers markets are very positive and are very important to me... they really contribute to cash flow, especially when you're waiting for the supermarkets to pay."

Palpable amongst many of the participants in this research is a sense of agency and control over their overall farm operation and their earnings which is not necessarily achievable within conventional supply chains. Brendan Allen of Castlemine Farm describes this as "as a greater control of the value that the farm can generate". He describes their direct sales activities as having "created opportunities for us. We can continue to add value. Setting up a food business has been a great learning process, we are now more confident to take stuff on, we know we can make a reasonable living."

A further significant benefit of this kind of activity is the opportunity it provides to carry out direct and very cost-effective market research amongst customers. Tom Clancy, who sells poultry and eggs at a number of farmers' markets in Cork describes markets as;

"...a great tool for market research; you know straight away how you are doing. People going to markets know and love their food and they will tell you immediately what they think. I have built up a relationship with people, there's a trust there."

Other participants described the direct market intelligence which can also be provided by intermediaries such as specialist distributors, retailers and chefs. Claire Winters, who sells high value vegetables and salad leaves in the North West described this process;

"When you have a good relationship with a retailer, they'll give you feedback on what works and what doesn't. For instance, the health food shop I sell to will tell me if I got the mix in the salad bags too peppery. You can then better meet the demands of their customers."

This exchange is not necessarily one way; Kathleen Nerney of Adora Flax Oil also described the opportunity trade shows and exhibitions provide to educate and inform consumers and intermediaries about the value of what you are producing.

The more direct and personal nature of SFSC activity also appears to build, perhaps force a greater reflexivity about what the market demands, about what the competition is doing, and ultimately, about how the producer can do better. Gerry Fitzsimmons, an organic beef producer in Co. Cavan, describes the more direct relationship as;

"...giving you more of an incentive to do better, you get feedback and positive reinforcement."

Tom Clancy in Cork reflects;

"Cork is one of the best places to be doing this kind of thing. The competition is fierce but it's good, when you know you have someone breathing down your neck, it forces you to continually do better."

Those types of SFSC activity which involve producers selling directly and often locally to end consumers can also deliver social and personal benefits to those who participate. A number of those who sell at farmers' markets describe it as "a way of life" with strong



relationships and rapport established between both themselves and their regular customers and with other stallholders over the years. The following comments were typical;

"This kind of activity is definitely more social. I have met a huge number of people through the likes of the farmers market, it's fun."

(Lindy O'Hara, Coopershill Venison, Co. Sligo)

"I love the distribution part, calling to people's houses, meeting people."

(John Tait, Aberdeen Angus beef producer)

Finally, one of the most frequently cited benefits of participation in SFSCs is the increased sense of pride and satisfaction usually associated with more direct sales;

"There's a great bit of pride and satisfaction too, getting recognition for your work."

"In 20 years of dairying, no one ever said 'that was a nice glass of milk', but now I have people coming up to me saying 'they were lovely eggs' or 'I haven't had a chicken like that since I was a child'."

"It's brilliant to see your name on something or listed on a restaurant menu."

3.2.2 Difficulties Associated with SFSC Activity

Although the participants in this research are broadly positive about selling within SFSCs, most have also encountered some difficulties and setbacks which also need to be brought to light. Our previous discussion on individual types of outlet highlighted some of the specific difficulties (as well as advantages) experienced, but in this section, we focus on the more general difficulties experienced by those operating within this sector of the food industry. The issue which most exercised the participants in this research is what is seen by many as the over-regulation of small scale producers. The following comments were typical;

"Over-regulation of food is the biggest barrier to the development of the sector. What we have to do and in particular what is required by retailers even exceeds legal requirements and a lot is down to interpretation. There is such red tape and bureaucracy associated with food processing...it's totally over the top, people don't

realise the stringency. There is a huge industry in food safety that is just creating jobs for themselves."

"There is definitely over-regulation in some areas. I know people who have walked away. It is a major barrier to people seeking to sell directly and especially the smaller operator."

"Bureaucracy is just gone mad with regard to food safety... the normal local trade that people always did is not permitted, like 'you buy my milk' and I'll buy your pig."

"On the one hand you have all this talk about developing a food culture and how great all these small producers are...but on the other hand the regulations operate as if they'd be happiest if there were only a few companies all operating in factory-like conditions. I guess that would make it easier to monitor."

One of the most frequently cited sources of frustration is the blanket application of the same food safety and hygiene regulations and practices to smaller operations as to large scale processors. A number of participants shared their experiences in this regard;

"You are really limited in terms of what you can do by regulation. For example, there are new labelling requirements coming in where you have to give the nutritional content. This will play havoc with small businesses. We have always had lots of unique flavours and could meet requests, but we couldn't afford nutritional analysis on 60 types of ice-cream. Also, we are due new packaging but others who may have recently invested will be at a loss. At no point should food safety be taken lightly but you cannot expect the same from a two-person operation as a Glanbia, there has to be a difference. You need a flexibility for smaller businesses which is not reflected in legislation."

"The regulations are definitely overly onerous; for example having to take samples from each part of the run when making the likes of cheese or ice-cream. This makes perfect sense in large processors but is farcical in small processors. Also, I had built a bread oven with the idea of having people come to visit the farm for pizza evenings, but again the health and safety issues were enormous and it just wouldn't have been worth my while."

A further source of dissatisfaction for some lies in the sheer number of state bodies/authorities conducting inspections. This appears to be particularly acute for those selling at farmers' markets or who have a strong public profile;

"Don't get me started on regulation. In the last two months alone, I've had six Environmental Health Office inspections at markets. Surely you should be able to get an annual certificate which is displayed. There have also been numerous visits from the Revenue and Social Protection. I'd say there's been maybe thirty inspections over 12 months between all the markets I sell at. The killing thing is that it puts the customers off, even if you're in the middle of a sale, they'll come over."

"I have a good relationship with the inspectors from the Dept of Agriculture but because I sell directly to the public and am fairly well known, I feel I am very heavily monitored and regulated. Equally, there are some quite dubious people who seem to manage to stay under the radar."

A further difficulty with operating in this sector of the food industry is the relatively small population combined with what is described by a number of participants as a limited food culture;

"We have a relatively small market here in Ireland with people having limited interest in quality aspects as far as I can see."

"It is a percentages game and the people who know about quality, about what's involved, it's miniscule."

"I think the Irish market is very limited overall and the likes of Lidl and Aldi do a very good job for most people."

The current economic climate has affected the capacity and willingness of consumers and intermediaries to pay a premium for some of the more specialised or high-end products in particular. As noted previously, it has obviously had a negative impact on sales and margins for most products in most types of outlet and perhaps particularly in proximate SFSC outlets such as restaurants and retail. A number of participants commented that while the cost of their inputs has risen inexorably, they currently have very little room for manoeuvre in terms of raising their prices to consumers and intermediaries. One beef producer shared his experience;

"I used to pay maybe €900 for a heifer and I could get €1600 for the animal processed and boxed; now I'm paying €1200 for the heifer and am getting a bit less than €1600 when it's boxed."

A number of participants noted the difficulties associated

with, as Orla Clancy of Clanwood Farm put it, *"getting the maths right"*. As more than one person noted, you might be selling well but it is of little use unless you are selling at the right price and getting a sufficient margin.

Meat producers in particular appear to face significant challenges in maximising the value they can achieve from their animals within this sector. The experience of John Tait, a producer of Aberdeen Angus beef, is illustrative of the challenges involved;

"Maximising the carcass is the main thing with animals. I could sell to more restaurants but they only want the prime cuts... I'm making burgers now too. I have tried and looked at lots of different options; a catering van, going on the road, supplying to a high end processor of prepared meals, etc. but I just haven't found the right person to work with yet."

This is echoed by Brendan Allen of Castlemine Farm;

"The first two or three years were very difficult, we had plenty of failures and bad days too...the hardest thing is dealing with waste, not selling every part of the animal. We have had to work very hard on that."

A further difficulty associated with operating in this kind of environment is the sheer level of work involved in operating at every stage of the food supply chain. The following comments were typical;

"The only drawback is that you have to be there 52 weeks of the year. It's very time-consuming. My wife and I have to split up to go on holidays."

"It's tough and much more involving than most people would realise. It's one thing to produce something but a whole other job worth to take it further. You have to be realistic about the time it will take...we have had to employ people on the farm to free us up for the other side of it."

A number of participants in this research also questioned whether there is a level playing field in Irish agriculture for those operating outside of mainstream commodity agriculture. Some are excluded from the Single Farm Payment because of what they produce while others suggested that organic producers and smaller, more mixed enterprises are poorly represented and supported in the likes of CAP negotiations or in the overall vision for agriculture as represented by Food Harvest 2020.



3.2.3 Skills and Experience Associated with SFSC Activity

The producers who participated in this research were asked what skills they specifically brought to this kind of work, but also what skills they felt are necessary for anyone embarking on more direct selling. Overall, there was an overwhelming consensus that a very wide and varied set of skills were usually needed when you are effectively operating at every stage of the food supply chain, from production right through to sales and distribution. It is this requirement for a range of skills which at least partly explains the level of family involvement outside of the 'producer' typically found in these enterprises. As noted by one participant;

"There's just no way you could do it all yourself, there's just too much involved. One person wouldn't have the skills or even the time."

As noted previously, all but one of the participating households has involvement by at least two members in SFSC activity, although the level of involvement obviously varies. In six cases, a minimum of two members of the farm household are employed full-time in the enterprise. In two of these, there is quite a clear division of labour between two people where one person is largely concerned with the production side of the operation and the other with the operation beyond the farm-gate. In the remaining enterprises, the level of involvement of other family members varies from skills-based support around particular aspects of the business (for example, web-design, or IT or marketing) to more general supplementary and occasional labour, such as helping run the production side of the operation or filling in at farmers' markets or doing deliveries. As noted by one participant in this research, family members will also usually have a greater commitment to and interest in the business that a paid staff member ever could.

Although a small number of participants referred to the importance of getting your product right and having an in-depth knowledge of it, it was apparent that the first stage of the supply chain (i.e. production) is relatively unproblematic for most farm households. That is typically where their core skills, experience and interest lie. All appear passionate about the quality of what they are producing and concerned to continually improve what they do and to meet consumer expectations. The focus of most participants' conversations on skills was on those needed to engage with consumers and intermediaries

directly and to actually go on to sell what you produce at the correct price. As Nigel Harper of Cramers Grove Ice-cream put it;

"You don't get paid for making it but for selling it. That's the most important thing to remember. Being able to get out there and sell, coming from a farming background, that's where most people fall down. You have to realise how much other food businesses spend on marketing.... You have to make a huge time commitment to the sales end of it."

A number of participants noted that you are 'selling yourself' as much as your product. In line with this, most participants mentioned the necessity of having very good social skills and of enjoying or at least not minding meeting with and interacting with people all the time. The following comments were typical;

"You need to be a people person and able to get what you want to say across to people. You need to be able to stand over what you produce and put your name to it."

Padraig Moran, lamb producer, Co. Tipperary

"You have to be a people person, if you can't deal with the good, bad and indifferent customer, you'll fail. It's work every day, you have to capture and deal with and retain every customer. Return customers are the thing and you can't have a set sales patter, you have to adapt constantly.... You have to sell your whole self."

Paddy Byrne, organic vegetable grower, Co Dublin

"You need to be good communicator and to be able to sell it. It helps if you are likeable and approachable, open and honest, flexible about price and able to take a bit of criticism."

Claire Winters, organic vegetable grower, Co. Sligo

"If you don't have the people skills to sell it, you'd have to have a really, really unique product or be doing it so much better than anyone else."

Tom Clancy, poultry and egg producer, Co. Cork

A number of participants also noted the importance of operating with integrity and honesty. As Tom Clancy puts it;

"You are partly selling yourself, your integrity and your good name. I made a decision that I would only sell what I produce myself. I can see my birds going through from start to finish. The honesty of the product and the producer is a big thing. The reason I am in

Mahon Point (Farmers' Market) is because they needed more genuine producers."

Other frequently mentioned skills or perhaps qualities were those of being continually entrepreneurial and flexible. As Lindy O'Hara, a venison producer from Co. Sligo put it;

"You have to be constantly entrepreneurial and adaptable, always looking for opportunities, thinking of ways of maximising value... they all add up."

Similarly, Brendan Allen of Castlemine Farm noted that you need to be "continually working on your business rather than always working in your business." Associated with this entrepreneurialism is the capacity to seek out and to avail of opportunities and supports which are available. As we will see, most of the participants in this research have availed of hard and/or soft supports from LEADER and other support agencies. However, a significant number of participants noted the importance of exercising good judgement when it comes to availing of any opportunity;

"You need to get out and get lots of relevant information and advice. However, you need to be careful who you get it from, people from a large business background might encourage you to spend money you don't need to spend."

"People have this idea that to get bigger is better but it isn't always. For example, just because you get listed with a particular retail chain, or get into a particular restaurant doesn't mean you should go on to supply them."

"You need to be wary of applying for funding to buy equipment or machinery just because the funding is there. You have to ask yourself whether you really need it."

Given the highs and lows associated with the food business, it is also apparent that those seeking to add value and sell more directly need a level of toughness and determination. As Brendan Allen of Castlemine farm put it;

"You need resilience and to just keep going. Setting up the business is like doing an intense 3 to 4 year degree and it's a very steep learning curve."

3.3 The Environment in Which SFSC Activities Operate

3.3.1 Impact of SFSC Activity on Wider Local Economy

The impact of the enterprises included in this study on the wider local economy obviously vary according to their scale, type of activity, etc. but all would feel that they do make a contribution to local economic development. As noted previously, six of the enterprises provide direct employment for at least two family members. Five of the fifteen enterprises provide part-time or seasonal/occasional employment on either the production side or the sales side of the enterprise. Two of the enterprises are significant local employers; Old Town Hill Bakehouse employs 18 people and Castlemine Farms employ 10 people. As Brendan Allen of Castlemine farms notes, all of these jobs have been created in the last number of years, have taken people off the Live Register and are rooted in a rural area.

In addition to direct employment, a number of the enterprises included in this study have strong and symbiotic links with other local businesses. Orla Clancy, for example, notes;

"There are three other local businesses getting a lot of business from us, supplying bread, cheese and vegetables for the catering van side of the business, all organic. They would, in turn, buy from us."

Similarly, Adora Flax Oil and Seeds now have three other local farmers growing flax for them. According to Kathleen Nerney of Adora, these farmers are gaining not just an income source but a renewed interest in their work;

"There is a level of enthusiasm for it, the farmers we are working with love the challenge of a new product, a good product... they are excited at the prospect of growing something they can see on a shelf, that they helped to put there. I feel we are resuscitating an interest in growing, in something ancient, they are rising to the challenge, there are some really skilled farmers out there who get it, it's great to see."

A number of participants also noted the small but important contributions any small local enterprise will make to the local economy, such as buying diesel for a van, engaging a local bookkeeper or accountant, getting labels or bags printed, using courier services,



etc. Only one of the enterprises has a direct link with a conventional tourist enterprise; Coopershill Venison is an integral part of the Coopershill estate, a luxury country house hotel. However, a number of other enterprises host Organic Farm Walks or have hosted food or farming related events and talks which would bring footfall and business into their communities. Although a number of participants mentioned the existence of Food Trails and other fledgling local and regional efforts to promote food tourism, none have to date become significantly engaged with these, although some acknowledge that there may be further potential to do so.

3.3.2 SFSC Activity in the Context of Irish Farming Culture

As noted previously, the great majority of Irish farmers have not engaged in any way with this added-value or direct sales dynamic and remain price-takers in commodity markets rather than price-setters in short food supply chains. In an attempt to shed some light on this phenomenon, participants in this research were asked what the reaction of their fellow farmers has been to their SFSC activities and whether this reaction has changed over time or with perceived success. The reaction appears to have been somewhat mixed, perhaps best summed up by the experience of John Tait when he began selling his Aberdeen Angus beef directly;

"I got all sorts of reactions from 'best of luck' to 'you're mad' to 'they won't pay you', to the more traditional farmers who would have no time for it."

Participants in this research articulated a number of reasons why this kind of activity has gained limited traction in contemporary Irish farming culture. Interestingly, while many said they found the reaction of their fellow farmers positive, with comments like 'good on you' and 'that's great', this was usually accompanied by the proviso 'but it wouldn't be for me'. Therefore, one of the most obvious barriers is the simple preference of most farmers to focus on production;

"I get quite a good reaction and people think it's a relatively good idea, but not for them. Most farmers seem to be happier in the field."

Nigel Harper, Cramers grove Ice-cream

Even amongst the participants in this study, there were a number of examples of family operations where one person clearly and happily focused on

the production side of the operation while the other focused on activities beyond the farm gate. A number of participants alluded to the overall focus on and investment in commodity agriculture and the direct payments associated with it as a further key barrier to innovation. The following comments were typical;

"Farmers are still quite convenience oriented, they see themselves as commodity producers and are not really willing to take a risk."

"Over the last 20 or 30 years, farmers mindset has been very influenced by the availability of subsidies, there is a kind of a dependency culture and lack of entrepreneurialism".

Also associated with this focus on commodity agriculture is what many some participants see as a diminished capacity amongst contemporary Irish farmers to operate a more mixed enterprise. One organic farmer described this as;

"...a lost set of skills which came along with more mixed enterprises, such as saving grain, or being self-sufficient as a family. It's hard to describe some modern day farmers as such, it's very much a mono-culture.... with over specialisation and over production, some are more tractor drivers than farmers."

There also appear to be some strong cultural barriers to engaging in this kind of activity. Much of this appears associated with a reluctance to, as some participants commented, 'put yourself out there'. As one vegetable grower noted;

"A lot comes down to pride, some people just would not stand on a street selling things. They'd be afraid people would say 'that fella must be short of money'."

A number of the meat producers in particular encountered what they would describe as begrudgery amongst some fellow farmers who questioned their 'right' to promote their products over and above that of their fellow farmers;

"The Irish culture and psyche is a hard thing to break, there was a bit of an element of 'who does he think he is', and 'my stuff is just as good as his'."

"There was a bit of begrudgery initially but you can wear that opinion down, especially by employing people. The cultural barrier is there but you ignore it. We were the

talk of the meat guys for a while with a fair bit of 'who do they think they are' but now people are coming to us looking to sell."

As the last comment demonstrates, success appears to lend greater credibility to the farmer who has chosen to sell directly. Notwithstanding the enduring practical and cultural barriers, there was a feeling amongst many of the participants that the notion of adding value and of exploring outlets outside of commodity agriculture now has greater purchase amongst the farming community and the wider community than might have previously been the case. The following comments were typical;

"The attitude generally to food has changed hugely, there's much more focus on health and especially at the moment, on traceability."

"I get queries all the time from farmers looking into doing something like what I'm doing."

"When we started doing this (farm-based ice-cream production) we were probably the only the ones at it, now I think there's about seventeen."

3.3.3 Experience of Rural Development Programme

Eleven of the participating families in this research have received some support under the Rural Development Programme. Of those who have not, two applied for grant aid but were ineligible for funding and a further two have not sought any support. Of those who have received funding, seven received (at least part) funding for capital projects such as food preparation rooms, catering vans, equipment, water treatments systems and three-phase electricity. Equally, some of those who received funding for some activities were ineligible when they applied for grant aid for other activities. A smaller number received grants for small expenditure such as packaging, getting bags printed or labelling.

The majority of participants in this research were broadly positive about their experience of applying for and receiving grant aid under the Rural Development Programme. As noted by a number of those who received capital funding, getting a grant was usually the difference between doing something and not and enabled them to progress their business further without incurring substantial debt. Most of those who

received capital funding were broadly positive about the experience. One noted in particular the support provided by staff in facilitating grant applications;

"I found them very good to deal with, very clear. They laid it out nice and simple for me which I needed. If I had a problem with the form, they helped me."

Four of the participants found that the rigours of the application process, including the drawing up a business plan, was an important source of learning and forced applicants to really interrogate their own business idea. As one commented;

"We got capital funding at the start and were very happy with it. Having to draw up a business plan was good for us as was meeting the committee. It clears your head and forces you to think everything through. I got to hear other people's opinion on my business. It was a reality check really; you're usually full of enthusiasm for the product, but it can cloud your business judgement."

While acknowledging the importance of due diligence in the application process, others felt that it was overly cumbersome and bureaucratic. As noted by one farmer who availed of mentoring support but decided not to proceed to apply for a capital grant, the application process itself involves a substantial investment of time and resources which he was reluctant to allocate;

"The amount of red tape and hoops to be jumped through is substantial. You need to get a business plan drawn up and to get the three quotes and then time frame is quite long. Things are tight enough...I didn't want to invest time and money without greater certainty of outcome."

Another noted that the terms and conditions associated with grant support can be quite onerous and recounted his frustration at the constant warnings of the myriad ways in which he could lose his grant. Other notable sources of frustration include the inability to source equipment second hand when, as noted by at least three participants, there is very good value to be had and the requirement to obtain three quotations for every piece of work/equipment. In addition to the workload associated with this, a number of participants noted that what they required was so specialised that it might be only available from one source. A further criticism of the grant aid available under the Rural Development Programme was that it can in some



cases, its availability and promotion can encourage applicants to make investments which are beyond what the business actually requires. One farmer recounted his experience;

"I went to LEADER because I just wanted a few bob to get brochures and labels printed and maybe a bit of mentoring but I felt I was almost encouraged to make capital investments which weren't really needed."

Another observed that in hindsight, he would have grown the business more slowly if not for the availability of funding. These experiences highlight the need for a highly differentiated approach to dealing with individual farm households and businesses.

As noted previously, eleven of the participants in this research have availed of the more indirect, soft supports funded under the Rural Development Programme. These include participation in training programmes and in food-related networking events, food trails etc. organised by their respective local development companies, participation in farmers' markets funded under the Village Renewal and Development measure, and availing of the likes of mentoring support or a technology audit or a feasibility study. As noted by one participant;

"Once you are on their (local development company) database, you get to hear of lots of opportunities and are automatically plugged into a network and a source of support."

A majority of participants had very positive experiences with the staff of their respective local development companies and with the mentors and trainers associated with the more soft supports. However, a minority argued strongly for the need for staff and mentors to have some on-the-ground experience of setting up a business and therefore a greater understanding of what fledgling businesses required. A number suggested that peer-to-peer support and mentoring between those who have *'been there, done that'* would be more beneficial than bringing in outside *'experts'* who might have little practical experience. One farmer said he had found his local Enterprise Board to be *"much more clued in and helpful in terms of what businesses need"* than his local LEADER company while another argued that LEADER companies can tend to focus too much on their community development *'side'* and should instead adopt a renewed focus on enterprise as the key to rural economic development.

3.3.4 The Role of External Actors in Encouraging and Facilitating SFSC Activity

As noted previously, the decision-making process around adding value and exploring more direct sales options will usually (if not consciously) involve analysis of the internal resources and external resources and environment available to the farm household. We have discussed internal farm resources in some detail but what realistic changes could be made to the external environment and by the actors within it to further encourage and support this kind of activity? In this section we will focus on the three critical areas requiring change or support which were raised in the course of interviews with those who are currently out there in the marketplace.

3.3.4.1 Addressing Over-Regulation and Bureaucracy

As noted previously and as we discussed in some detail, the perceived over-regulation of small-scale food producers emerged as the most frequently cited barrier to the further development of the sector. Most of the participants in this research argued for a shift to a more supportive and flexible regulatory regime, which was consistent in its approach and more appropriate to the scale at which most producers were operating. A number of participants argued for a better balance to be found between the absolutely legitimate need to ensure food safety and the equally important goal of encouraging and supporting the artisanal and small-scale food producer. There was a perception amongst the participants in this research that those responsible for the former currently have little understanding of or are unable to take into account the latter. As we noted in our discussion of the Rural Development Programme, a number of participants also argued that funding regimes such as the Rural Development Programme need to be made less bureaucratic and rigid in order to encourage wider engagement.

3.3.4.2 Building the Food Culture

A number of participants in this research noted the lack of a food culture in Ireland as a barrier to the development of their own businesses but also the development of the sector beyond its comparatively low base. Many suggested that greater education and awareness-raising about the food system and about the value of their activities within it are required;

"There's a real need for more education as to how the food system works and about the importance of supporting small producers. Sustainability and home grown food should become the priority. There is a real dearth of knowledge out there, it's just not in our culture."

"There's a need for another round of educating the public on food, on the hidden costs of cheap food, on the tactics of retailers, that kind of thing."

The targets of these educational and awareness-raising activities range from farmers themselves;

"I find Ag students very focused on intensifying, it's all about getting bigger; their education should encourage entrepreneurialism, get them to think more about what they have and what they could do outside of commodity agriculture."

...to the wider public;

"I had a Bord Bia food demo on the farm last year, 150 plus attended. It was amazing, we need more of this kind of thing...you could turn the likes of my place into a showcase. We need more events like National Organic Week, more demonstrations and things like that that so people can see process behind and so you can raise awareness of quality. That's how you build the market for the kind of food I am producing. Support bodies, the likes of LEADER, they should be doing more of this kind of thing."

Some producers such as Brendan Allen of Castlemine Farm argue for a shift away from the somewhat elitist 'foodie' or artisanal tag which often attaches to the efforts of small scale food producers. He shared the philosophy of their operation;

"We wanted to make ourselves more mainstream, to stay away from both the price-driven model and the artisan/foodie thing. Our USP is quality food at the best price we can offer."

3.3.4.3 Encouraging and Supporting Non-Commodity Based Agriculture

As noted previously, there is a perception amongst some of the participants in this research that there is not a level playing field for those not involved in non-commodity agriculture and that there needs to be further support and encouragement in this regard. As noted above, this at least partly involves educating and

working with current and aspiring farmers to broaden their perspective on their options. As Brendan Allen of Castlemine Farm noted;

"One of the big problems for farmers is lack of knowledge. You need to do pre-commercial work on fostering creativity. Bringing in tourism and food entrepreneurs to tease out ideas, peer to peer mentoring, increasing the culture of entrepreneurialism; all of these are part of the mix. There is real potential for rural-based enterprises."

Similarly, Kathleen Nerney of Adora Flax Oil argued;

"Farmers might spend 70,000 on a tractor but they could set up an enterprise for that. There's too much focus on machinery rather than on ideas. It is hard work but there is a real future in it, the import substitution potential is definitely there with some products. The country will only come back when we focus on the things we can do well ourselves based on the resources we have."

Some participants suggested that cooperative approaches such as small scale producers' cooperatives and local arrangements between producers could enable more farmers to tap into the opportunities associated with SFSCs, without necessarily having to fundamentally alter their operation;

"I think there's potential for small groups or coops of producers, they could join forces and do it bigger than one man on his own. If it can happen in Connemara or Kerry, it can happen here, it's all about mindset."

As previously noted, it has also been argued that LEADER companies should adopt a renewed focus on enterprise – and particularly those based on farming and food – as the key spur to rural economic development.

3.4 Plans for Future Involvement in SFSCs

One organic meat producer expressed some doubt that he would continue with his current activities in the medium to long term, noting that;

"It's not viable really and I've already spent quite a lot of money getting it up to standard. I'm at a bit of a crossroads... another year like last year and I might stop farming and plant forestry. I run things at a pretty good level and am getting a good enough price but food is just too cheap."



However, all of the remaining participants in this research plan to continue with some level of activity in SFSCs. Approximately two-thirds of the participants in this research plan to continue operating at a similar level to that currently being pursued although a majority of these would still have plans to 'tweak' the business, expand certain sides of the operation and perhaps curtail others. The following comments demonstrate the awareness which exists of the need to constantly refresh and re-orientate operations;

"We are currently planning to move the production in-house rather than sending it out of house to specialist butchers, smokers, etc. We will continue and we'll also try to maximise the full value of the animals more by selling the skins, antlers, etc."

Lindy O'Hara, Coopershill Venison

"I plan to develop on-farm production and make some general improvements to yields and productivity. I also want to develop the jams and chutneys side of things... they have a good shelf life and good margins and help to cut down on waste. I'd also like to get more customers on to the farm for the likes of strawberry days, cookery days...let them see what I do."

Paddy Byrne, organic vegetable farmer

Four of the participants could be described as having more ambitious plans to grow and expand their existing food businesses. Three of these businesses would describe themselves as now having a solid base and level of knowledge with which to go forward;

"We will continue on this route, I think the hardest part has been gotten through. We are now established and have credibility and a level of exposure. We will expand on areas that have potential or where there are good ideas...We are flexible and adaptable."

Orla Clancy, Clanwood Farm

"We have gone as far as we can with the raw meat, now we want to increase the value further and we have the kitchen now to do it. We are ambitious for it but it's easier now, we have the base to work from. We can be patient because we are finally making some profit."

Brendan Allen, Castlemine Farm

We do plan to grow the ice-cream business but it's a 30 year plan, you need to think in terms of decades. It needs to pay for itself more but we haven't really over-extended ourselves either."

Nigel Harper, Cramers Grove Ice-cream

Adora Flax Oil is a newer business than many of the others, but here too there is a strong ambition to make expand the business beyond current levels:

"There is a big demand for the seed product....hopefully we will continue to master the growing and production side of it. We will be investing soon in a new grain drying facility and hope to make this a three-person operation. We are looking for someone at the moment to take on the marketing side of it. There's no reason why any should be imported because an Irish product is better suited to Irish people and the Irish climate. We plan to be widely available beyond speciality retailers."

Six of the participants in the research mentioned the importance of maintaining the farm and the capacity of the farm to provide a living (or indeed multiple livings) for the next generation as a motivating factor in continuing on the route they have taken. Oliver Clooney who sells vegetables and potatoes through a variety of outlets already has a son who is very involved, interested and ambitious for the business; as Oliver notes, he probably wouldn't still be in it if it weren't for that. However there was a strong feeling amongst most participants that the next generation would also have to pursue their own interests first; this feeling was particularly acute amongst those who had themselves gone straight into farming from school.

Participants were also asked whether they felt there was potential for more farmers than heretofore to get involved in this kind of activity. Most agreed that there was potential and some went further to argue that farmers should be actively encouraged to explore how they might make better use of their internal farm resources. When asked whether they would encourage fellow farmers to engage in SFSC activity, the majority of participants said that they would but with some provisos. Chief amongst these was the caution to start small and to minimise initial investment, even where grants might potentially be available. Most agreed that in this context, farmers' markets can provide a particularly cost-effective testing ground for products and for the skills and predilections of the seller. A further proviso was the need to be realistic both about the time and labour involved in this kind of work and the length of time it will usually take to begin to make a reasonable profit. A number of participants also mentioned the need to have some sort of 'feeling' for this kind of activity and a passion for the product you are offering to the marketplace.

4. Conclusions, Lessons Learned and Recommendations

This study has provided a necessary insight into the journey, the experiences and the learning of a range of Irish farm households who have embarked on alternative paths to reaching the end-consumer than that offered by the conventional food system. Although their experiences have been mixed and there remain significant challenges and barriers, all plan to continue operating in this sector of the food industry. It is hoped that this insight will provide both inspiration and concrete learning for other farm households thinking of embarking on a similar journey. It should also be of interest to those professionally tasked with supporting and encouraging the growth and further development of the sector.

We can summarise the **key lessons** from this study¹⁵ as follows:

- Unless it is to remain at a relatively simple level, with limited potential for growth, this kind of activity appears to require the inputs (i.e. the skills and the labour) of more than one member of the farm household. This input ranges from minimal, often skills-based inputs to whole family involvement but it does appear to be critical. Any animation or development work needs to adopt a similar approach in encompassing the skills, experience, interests and ambitions of the farm household as a whole.
- Although no comparative study has been done with conventional farm households, it appears that at least one member of the farm households embarking on this kind of activity will usually have at least one of the following; significant off-farm work and life experience, an entrepreneurial background or education qualifications outside of agriculture and farming.
- Individual farm households can improve the viability and sustainability of their farm businesses by operating at widely different scales within this sector. Some will want to scale up and expand their businesses and sell predominately into proximate and/or extended chains. As this research has demonstrated, there are perhaps more who will consciously continue to operate at a more face-to-face or small-scale level, typically with a high level of control and with a business model which is suited to their way of life and to the capacities of the farm holding and farm household. As this research demonstrates, the latter approach clearly merits support in its own right, rather than being necessarily seen as a (stalled) stepping stone to the former. In addition to contributing to the viability and sustainability of their individual farm households, those larger numbers operating at this level are widely dispersed and clearly a vital part of the economic and social fabric of rural life.
- There is potential for this kind of activity throughout the country, but proximity or otherwise to population centres and/or a receptive consumer base appear to impact strongly on how and in what way the business evolves. Farm households operating in more marginal and less densely populated areas will inevitably have difficulty with local sales and distribution if their product is highly specialised and will usually need to explore working with national-level specialist distributors, selling online, etc. Some options such as farm-based shops will be largely closed to them due to poor volumes of customers or passing trade. If selling through farmers' markets, they may need to sell at more of these than might a farmer selling into one or two large and busy urban markets. Farm households operating in closer proximity to population centres and/or a receptive consumer base may have significantly more options to explore but equally and particularly if located in areas with a strong food culture such as Cork they may face greater competition and encounter less customer constancy than those selling in a more limited but possibly more static market.
- The typical farm household which embarks on this journey seems to assemble and juggle a large range of outlets for their products, with a majority selling into three or more. There was a strong awareness of the need to spread risk and to remain flexible and alert to shifts in consumer demand and behaviour and to trends in the wider food industry.
- Face-to-face SFSCs and proximate SFSCs are the categories which appear to have the greatest traction with the farm households which took part in this study. Within these categories, the most popular outlets are farmers' markets and local/regional restaurants. These are followed by sales via farm-shops or at the farm gate, sales to speciality retailers, sales via specialist distributors and online sales.
- Each type of outlet has its benefits and its drawbacks and every farm household embarking on SFSC

¹⁵ Given the relatively small sample size and the qualitative nature of this study, the conclusions reached and lessons learned are necessarily tentative.



activity assembles a mix of outlets which 'works' for them and their operation. The factors which appear to determine the most suitable mix for each household include the location of the farm, the type of produce, the labour available to the enterprise, the personal preferences of the household with regard to selling, the level of ambition for the enterprise and the general market conditions.

- The decision-making process around which outlets to explore or pursue clearly involves trade-offs and compromises. The more direct, face-to-face means of engaging with consumers – farmers markets, farm shops and farm-gate sales seem to be holding up comparatively better in the current economic environment and a level of control, agency and flexibility clearly remains with the producer. They also ensure cash-flow and as we have noted, this is increasingly necessary even for larger operators in the current trading environment. Set against this, there are limits to the market for the product(s) and the overall growth of the business (if growth is sought) within this model. In this context, intermediaries can be critical to success, though producers clearly need to be judicious and strategic in both the type of intermediary with which they choose to engage and in developing the terms of that engagement. The retail and restaurant trades are perhaps the most problematic and risky, particularly in the current economic environment. Unless significant expansion is the goal, larger retail operations and chains do not appear a suitable outlet for most small-scale producers. On the other hand, more local and/or speciality shops, where there is a high degree of local owner control, appear a better and more long-term 'fit' for the kind of businesses involved in this study. Similarly, specialist and trusted distributors can have also have a role to play in enabling expansion and distribution and in managing payment issues, particularly for those with more niche or specialist products.
- The key benefits of operating within SFSCs are improved margins, a return of greater agency and control to the primary producer, the ability to access direct market intelligence, improved social connectivity and an increased sense of pride and confidence.
- The perceived over-regulation of the food sector emerged as the issue which most exercised participants in this research and was identified as the single biggest barrier to the further development of the sector. Other difficulties associated with operating in this sector of the food industry include what is generally seen as the limited food culture, the price-driven nature of the market in the current economic environment, the rising costs of inputs and the time commitment required.
- There was consensus that a very broad range of skills were needed to effectively operate at every stage of the food supply chain. Chief amongst these are selling skills, the capacity to communicate your message and 'sell yourself', the ability to work on the business as well as in the business and an ability to both avail of opportunities and advice and to exercise good judgement as to the value of these.
- Businesses such as those examined in this study make a strong contribution to local economic development. Some are employers, others have strong symbiotic relationships with other farmers who supply to them and all use the services of other local businesses such as printers, couriers and bookkeepers. Although linkages with tourism development currently appear weak, most agreed there is significant potential for this to develop in the future.
- The prevailing culture of Irish farming appears to remain firmly oriented towards commodity production and conventional sales routes though most of the participants in this research have found their fellow farmers both more receptive to and curious about their choices in recent times.
- The experience of participants in this research of the Rural Development Programme has been broadly positive and it has, through a range of hard and soft supports, enabled development and improved performance in many of the businesses studied. Clearly, the local companies which deliver the RDP remain the most appropriate channels through which the majority of rural-based small-scale food enterprises can continue to be developed and supported. However, there was also some questioning of the level of bureaucracy and restrictions surrounding the grant application process, of the relevance of the programme to some very small-scale enterprises, but also as to whether those engaged to work with farm households always have the necessary on-the-ground experience.

4.1 Recommendations Specific to the Rural Development Programme

Any future rural development initiatives such as the Rural Development Programme will have a key role to play in encouraging and supporting the further development of this fast-growing sector of the food industry. There is also potential for the people and products within this sector to both complement and invigorate other areas of activity within the RDP such as rural tourism, enterprise development, farm diversification and village renewal. The results of this study would indicate that activity and support in this sector should focus on three key areas¹⁶:

4.1.1 Working with Individual Farm Households

- Carrying out pre-commercial animation work with farmers and other members of the farm household which will foster creativity and encourage farm-based innovation. This work would ideally be carried out by existing food entrepreneurs from a similar background to potential clients who can both provide 'real-life' insight into the process of business development and act as credible mentors in teasing out ideas. It is also necessary to continue to look beyond the current farmer base and possibly entrenched notions of what a farmer is to work with new entrants to the food sector, including those operating intensively from very small holdings such as encountered in this research.
- Encouraging and funding participation in relevant external education programmes in speciality food production, nutrition, food science, organic growing for members of farm households wishing to deepen their knowledge base. This research has highlighted the role of such education (as opposed to training) programmes in the development journey of a significant number of participating farm households.
- Providing 'short and sharp' training programmes targeted at the real and ongoing needs of farm households already operating in this sector. Where possible, these would again be delivered (or at the very least, co-delivered) by practitioners with specific experience and by industry insiders (e.g. buyers, distributors, etc.) rather than professional

consultants/trainers. In order to ensure that the most knowledgeable and credible people are delivering such programmes and to enhance value for money it may be increasingly necessary for LEADER companies to collaborate and run training programmes on a more regional basis and/or to make increased use of distance learning methodologies.

- Continued grant support for promising capital projects within this sector, but at a scale appropriate to the needs and ambitions of the individual business and only where such expenditure is really necessary.
- Continued one-on-one mentoring work with food businesses which brings a 'fresh pair of eyes' and a level of objective judgement to the sales and distribution aspects of supply chain activity in particular.
- Acting as a local portal through which food businesses can both access and be supported in utilising the knowledge and resources developed by other bodies and agencies (for example, the extensive market research or the lists of distributors compiled by an Bord Bia).
- Continuing to work at an appropriate and differentiated level with small-scale food entrepreneurs who may never 'scale-up' or require intensive capital support but who contribute hugely to overall rural sustainability and a vibrant local economy. New mechanisms may have to be found to enable LEADER companies to measure, valorise and validate this sometimes less obvious area of their work.

4.1.2 Working with Groups of Farm Households

- Organising and facilitating networking events, industry-relevant talks, themed discussion groups, farm visits and social media for regional groupings of food entrepreneurs. The network of LEADER companies could also provide opportunities for farm households with similar businesses in different parts of the country (i.e. where they are not direct competitors) to learn from one another's experiences.

¹⁶ These recommendations are summarised in Table 2 on pg. 44.



- Providing linkages and points of contact between farm households where there may be potential for collaboration or partnerships (e.g. between producers with complementary offerings who could sell each other's products at farmers' markets, or between food entrepreneurs and farmers willing to supply to them).
- LEADER companies have a significant role to play in animating, developing and supporting regional producers groups who may go on to sell regionally, nationally or even internationally. Producers groups have the potential to enable more 'ordinary' farm households to tap into the opportunities and increased margins associated with SFSC activity in a way that retains their occupational identity, utilises the skills they already possess and is socially and culturally acceptable to local farming communities. Although many of the recent producers groups which have emerged are in the meat sector, potential may also exist in other sectors (e.g. organic vegetables) or for producers groups with a mixed offering who could sell collectively and potentially more easily than they might do as individuals into specialist retailers, restaurants.
- Support for the development of small-scale or specialist food retailers, including farm shops which may go on to provide outlets for local produce.
- Support for activities and events which promote the local/artisanal food sector such as cookery demonstrations, food trails, food festivals, talks, conferences and themed events (e.g. strawberry days, collaborations with Craft Butchers of Ireland).
- Support for food-related tourism initiatives such as food festivals, food trails, cookery schools, links with restaurants and farm-based accommodation.
- Using the credibility and 'on the ground' experience gained from lengthy experience in this sector to advocate for further necessary changes which are outside the scope of the Rural Development Programme. From this research, these would include: a review of the regulatory framework for small-scale food producers (with relevant authorities such as the FSAI); an appraisal of the attention given to this kind of activity within mainstream agricultural training programmes and amongst agricultural advisors (with the Department of Agriculture, Food and the Marine and Teagasc); and a concerted and renewed commitment to supporting and developing this model of agriculture within both mainstream agricultural policy and rural development initiatives.

4.1.3 Otherwise Supporting the Development of the Local/Artisanal Food Sector

- As this research has demonstrated, farmers' markets are perhaps the most significant entry point and source of market intelligence for fledgling food enterprises, as well as being the main source of income and cash flow for many of the participants in this research. They act as informal hubs for networking and knowledge sharing amongst small food businesses and can provide a base for further collaboration between entrepreneurs. They also have a role to play in revitalising and enlivening public space and contributing to the tourism mix. Therefore, LEADER companies should continue to provide ongoing financial and soft supports for the development and strategic management of new and existing farmers' markets. They may also have a role to play in developing (or facilitating the organic development of) regional groupings of farmers' markets which may allow for a more efficient and cost effective use of human and capital resources and for less overlap between markets.

Table 2 Summary of Recommendations Specific to the Rural Development Programme

Area of Activity	Specific Recommendations	Potential Collaborators
Working with individual farm households	• Carry out pre-commercial animation work with members of the farm household, delivered by existing food entrepreneurs • Encourage and fund participation in relevant external education programmes for farmers wishing to deepen their knowledge base • Provide 'short and sharp' training programmes targeted at the real and ongoing needs of farm households, delivered by practitioners with specific experience and by industry insiders • Continue grant support for promising capital projects at a scale appropriate to the needs and ambitions of the individual business • Act as a local portal through which food businesses can access external knowledge and resources • Work at an appropriate and differentiated level with small-scale food entrepreneurs who may never 'scale-up' or require intensive capital support	• Farm bodies (IFA, IOFGA, ICMSA, ICSA, Macra) • Existing food entrepreneurs and food networks • Industry insiders (buyers, distributors, retailers) • Relevant trainers/consultants • Relevant educational providers • External bodies with particular expertise (e.g. Bord Bia, Taste Council, Teagasc) • Network of LEADER companies
Working with groups of farm households	• Organise and facilitate networking events, industry-relevant talks, themed discussion groups, farm visits and social media • Provide linkages and points of contact between farm households where there may be potential for collaboration or partnerships • Animate, develop and support regional producers groups	As above plus: • Existing producers groups
Otherwise supporting the development of the sector	• Continue to provide supports for the development/strategic management of farmers' markets and other specialist food retailers • Support activities and events which promote the local/artisanal food sector such as cookery demonstrations, food trails, food festivals • Support food-related tourism initiatives such as cookery schools, farm-based accommodation • Use the credibility and 'on the ground' experience to advocate for further necessary changes to the policy environment which are outside the scope of the Rural Development Programme	As above plus: • Farmers' market/country market organisers • Local/specialist food retailers • Restaurants, hotels, cookery schools • Tourism providers and industry reps • Other State bodies, agencies, whose work impacts on the sector

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Appendix 1

NRN Research: Facilitating and Encouraging Short Food Supply Chains

Semi-structured interview schedule for participating farm families

1. BACKGROUND INFORMATION

Prompts:

- Where is your farm located?
- How long have you been farming?
- How did you come to be involved in farming? (family farm or otherwise)
- Do you have any qualifications (agricultural or non-agricultural)?
- Have you worked outside agriculture? In what area(s)?
- Tell me about your overall farm operation, including size, different areas of activity, level of diversification, etc.
- Describe activities (if any) in mainstream commodity agriculture (i.e. sales to factories, cooperative, etc.)

2. SFSC ACTIVITY

Prompts:

- What kind of activities are you involved in which could be described as being outside of the usual commodity chains and where there is a short distance and/or a small number of intermediaries between you and the consumer;
 - Selling at farmers market(s)
 - Selling at country market(s)
 - Supplying to local shops/butchers
 - Supplying to local restaurant(s), hotel(s) cookery school(s), food service outlets, institutions, etc.
 - Selling into more extended chains (e.g. into shops, restaurants, etc. which may be at a geographical distance from the farm but where the identity and provenance of the producers and the product are still to the forefront)
 - Selling with other farmers as part of a producer group(s)
 - Selling on-line
 - Farm shop/roadside stand
 - Box scheme
 - Other (describe)
- What products do you sell currently?
- What was your original motivation in getting involved

in this sort of activity? How did it come about? Were there any particular push or pull factors or milestones along the way?

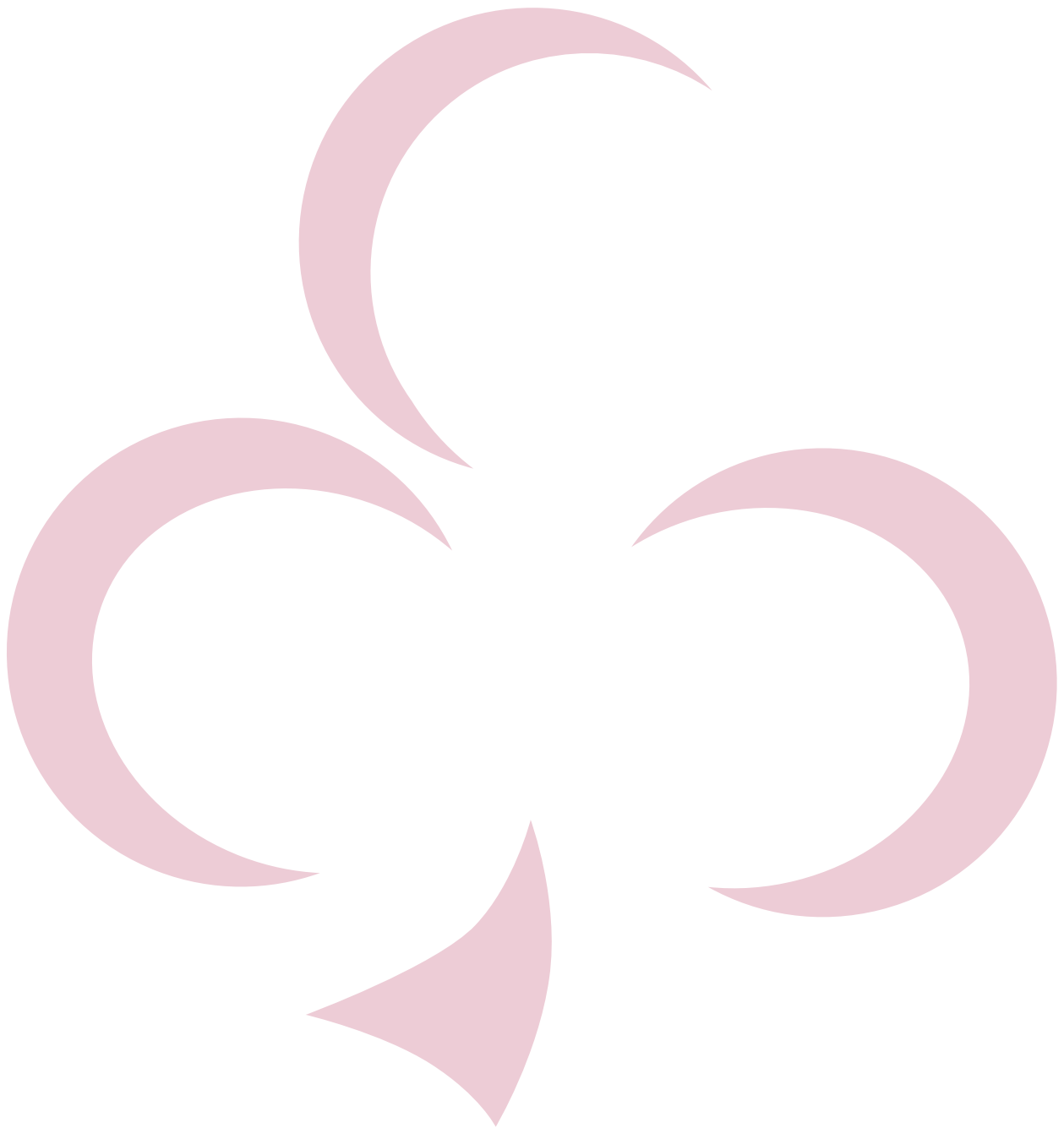
- Roughly what proportion of the total farm income currently comes from these kind of activities?
- What has been your overall experience to date of selling into short food supply chains?
- Detail benefits/pluses
- Detail negatives/difficulties/setbacks
- Detail learning, changes in mindset etc.
- How does participation contribute to:
 - a. Income and financial sustainability of the farm enterprise (i.e. is it worth it?)
 - b. Your level of control/influence in marketplace
 - c. Product range, quality
 - d. Any other complementary activities (e.g. tourism)
- If selling through a variety of channels, which have you found to be the most successful for you? Detail why.
- What skills do you bring to this kind of activity?
- What skills and resources do you think are needed to engage in this kind of activity?
- Describe the amount and type of family involvement in the operation
- What is this contribution 'worth' in terms of enabling the farm to participate in short food supply chains?
- What has been the reaction of your fellow farmers to your activities? Has that changed over time?
- What effect, if any, does your operation have on the wider local economy (e.g. providing employment, contributing to greater economic activity, contributing to tourism mix, etc.)
- What opportunities for networking with other farmers and food producers, for the development of local food 'clusters' have emerged from the kind of activities you are now involved with?
- Did you receive any funding from LEADER to get this activity off the ground?
- If so, what was that experience like? If not, were there reasons for this?
- What was your experience of the soft supports/advice, etc. provided by LEADER?

3. PERSPECTIVE ON THE FUTURE

Prompts:

- What are your own plans for future involvement in X?
- Where do these plans fit into your overall plans for the farm operation?
- Would you still describe yourself primarily as a farmer or....?
- Succession plans re. family farm operation?

- What do you see as the future of this kind of activity in general?
- Is there potential for more farmers to become involved in this kind of activity?
- Would you encourage them to do so?
- Are there unmet support needs for farmers looking to get involved in this kind of activity? Describe
- How might some of the barriers/difficulties you experienced be overcome?
- What specific supports might the Rural Development Programme (i.e. LEADER) provide going forward?
- What support could be provided by other sources (e.g. Dept. Agriculture, Teagasc, HSE, etc.)





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