The Value of Local Food: A Local Business Perspective

Executive Summary: Findings and Recommendations

The Value of Local Food survey was designed and implemented by Good Food Oxford to gauge the current experience in Oxford of, and barriers to, smaller local food businesses buying and selling local produce, and how a physical food depot for processing and distribution may be best utilised to improve the current situation.

Small businesses who may be on the cusp of expanding or who have already expressed a need for a physical food depot were emailed requesting a phone interview, and the survey was carried out over the phone and in person. We had thirteen responses from two primary producers, five secondary producers and six buyers.

We found that all producers and buyers in Oxford are eager to expand and increase the local produce market but that there are several common barriers to this, including a lack of time and labour, cost and availability of produce, and affordable space. Many of the food businesses interested in using the hub in any form are also committed to the same values, of best practise with respect to the local economy, community and environment and so by enabling them through the hub, their wider impact is enabled according to their ethos.

The planned food depot will be able to address and alleviate these barriers by providing a route to market for food producers, which currently can be a struggle for small businesses, with many surveyed stating that they don't have time to do marketing, identifying and contacting of potential buyers and distributing on top of producing a quality product. The depot will also help to streamline the logistics and bring the prices of good quality local and organic food down, saving small businesses further time and reducing the cost of production. Co-location of food businesses allows for the sharing of resources and knowledge, sharing delivery and also the potential for sharing of equipment, training and systems. Crucially the provision of space at below business rates provides the affordable space cited by many as a barrier. These survey results thus demonstrate how the depot can meet the real and specific needs of the Oxford food communit,y and will contribute to applications for funding for the building and initial running of a physical food distribution and processing space.

Additionally, the survey will inform the focus of further work by Good Food Oxford in increasing the amount of local food sold in Oxford and will inform the planning stages of this space to ensure that it best meets the need of Oxford's food community. For example, initially office space was suggested as a source of revenue but as very few respondents required office space plans have been amended accordingly, with the advantage of reducing the costs of the build and increasing the space of units. It also highlighted demand for hot-desking 'kitchen-space', as some many smaller producers only require a small amount of space and for just a few days a week, whilst some businesses are very seasonal and so only require space at certain times of the year. Practically, all interested tenants required refrigeration and cold-storage, lighting, electricity, water and wi-fi, temperature control, disabled access and kitchen, coffee and toilet facilities, and there needs to be sufficient room for vehicle parking and unloading for each unit.

The survey interviews also revealed that there is a desire that the food hub also provides services beyond just space to produce and process. Regarding the notion of a centralised ordering system with the hub, most respondents stated that they would be willing to place and take orders through such a system, and think a fee or mark up for this service would be appropriate. One suggestion was that those not tenants of the depot could be members of the ‘hub’, paying a fee to have full use of ordering and delivery services.

The potential for the hub to create greater connection between Oxford’s local food businesses through tenancy, use of and potentially membership of the hub was greeted with enthusiasm by respondents who would like an informal ‘breathing space’ to share best-practice and experience of commonly met issues from marketing to environmental health planning. Additionally, more formal help would also be welcomed in terms of advice and resources for business planning, marketing and food hygiene planning.

Alongside the enthusiasm surrounding the depot plans, the point was made that it is important to businesses that they maintain their independence and product identity and so careful consideration of how to balance pooling resources and making the most of the food hub as a collective whilst allowing tenants and members to remain independent.

In conclusion, the depot as planned will meet the needs of Oxfordshire’s local food businesses in order to increase the amount of local food being produced and eaten in the county, and is an exciting prospect for developing the local food community. However, careful thought and planning will be required from the set up to ensure that it can best meet the demands of the community beyond simply providing affordable food production and processing units. This aspect of the survey response reflects findings of the MLFW investigation into small-scale food hubs, which found that diversification of a depot’s activities were key to its long term financial sustainability and that creating relationships is at the heart of initial development.

Report on Survey Responses

The Value of Local Food survey was designed and implemented by Good Food Oxford to gauge the current experience in Oxford of, and barriers to, smaller local food businesses buying and selling local produce, and how a physical food depot for processing and distribution may be best utilised to improve the current situation.

We received thirteen responses from local food businesses: two primary producers, five secondary producers and six buyers. Primary producers were classified as those producing a raw product e.g. a dairy or growers, secondary producers included makers of apple juice, bakers and mustard producers, and buyers were restaurants, cafes and retailers. Respondents were initially selected with reference to GFO's member network and the 2016 Local Food Directory on the basis of capturing a wide range of products and businesses, targeting small businesses who may be on the cusp of expanding or who have already expressed a need for a physical food depot. These were emailed requesting a phone interview, and those that we had particularly identified as key representatives of Oxford's food system were sent a follow up email if they had not replied within a week. Once respondents had agreed to be interviewed, a time was arranged and the interview conducted according to the relevant script (Appendix B).

The survey was carried out over the phone and in person and was split into four sections 'About Your Business', 'Experiences of Selling/Sourcing Local Food', 'Using a Local Food Depot' and 'Expanding your Business'. These were tailored to the three business categories such that producers were asked about selling local food, buyers were asked about sourcing local food and secondary producers were asked about both.

We found a great variety in scale and type of food business of those surveyed (Figure 1.) but all respondents were keen to source and sell produce locally and believed that there are customers interested in buying such produce. However, most cited barriers that were preventing them from doing so for a wide range of products (Figures 3a. and 4a.), as well as other higher sourcing priorities including ethical, environmental, political and animal welfare concerns.

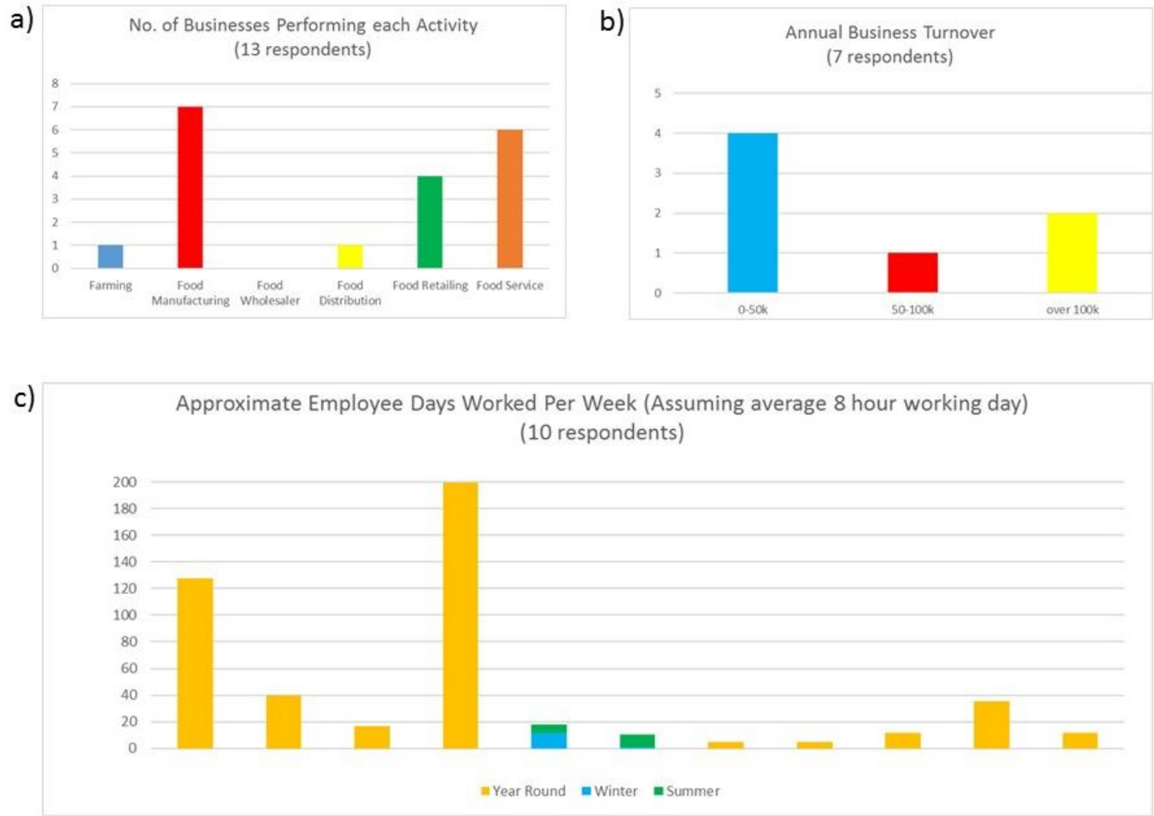

Figure 1 Information about respondent businesses

It became apparent that local producers are selling their produce locally, and that producers and buyers see a market for local produce (Figure 2a.), but that consumers often see local produce as a treat rather than a part of their staple shop and that it can be struggle to reach this market and to expand it further. Equally buyers and secondary producers found it difficult to source produce locally and continue to create a high quality and affordable product (Figure 2b.).

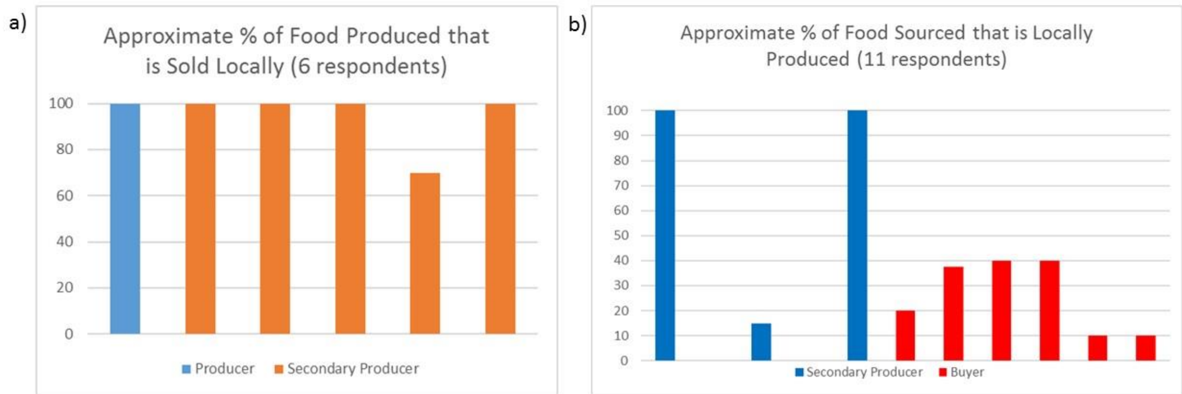

Figure 2 Current sale and sourcing of local produce

The main barriers to selling locally were stated as a lack of time, followed by the expense to the customer, a lack of skilled labour, and customer awareness (Figure 3b.). Small producers with just themselves or a few employees were struggling to find the time to do all the marketing and selling they would like whilst still producing a high quality product. They found that simply the setting up and running up of a food business takes up a lot of their time, even before making the effort to reach a customer base and invest the time to attend local markets. Time was not the only limiting factor here; many producers might not necessarily have all the skills required to effectively implement every stage from producing to selling, and in some cases were offering such a unique or novel product there was not the labour or knowledge readily available within Oxford. Those surveyed stated that this high labour and time investment results in a price that can seem unnecessarily expensive to customers who are unaware of the cost of production, particularly when contrasted to similar products in supermarkets, where the pricing is often not fair on producers. However, they also identified that customers may be very knowledgeable about food production and provenance but may be prioritising other issues, such as environmental and welfare standards, over local sourcing (Tables 1. and 2, Appendix A).

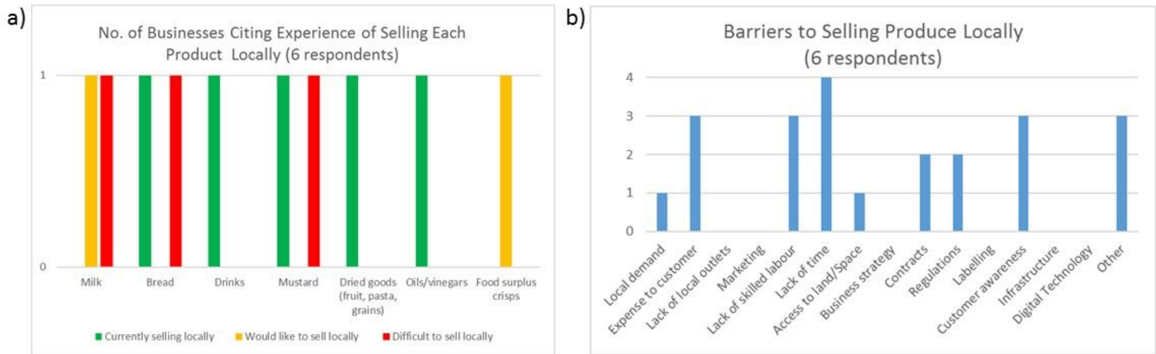

Figure 3 Experience of, and barriers to, selling produce locally

The main barriers for sourcing local produce were stated as product availability, then expense to source and lack of time (Figure 4b.). Producers claimed that some products were not available to source locally as not a lot of those items are being produced in the UK and what is produced is bought up by larger businesses. Another claim was that the product range was reduced compared to what is available in larger commercial centres such as London, and thus what is available does not meet buyer requirements relating to the environment, welfare or quality, or can be too expensive to buy in the volumes required as they are being sold as a higher-end product (e.g. organic). This limited product availability makes it difficult to buy local produce and continue to provide an affordable food product or service. As with selling, time was a factor, mirroring the experiences of producers; whilst maintaining a quality food service, buyers felt they didn't have the time to source quality local products and weren't being approached by local producers as much as they would have liked. Additionally, local produce was claimed to add to preparation time due to the extra sorting and washing often required, and extra time was also required in sourcing from several local suppliers rather than one wholesaler (Table 3. and 4., Appendix A).

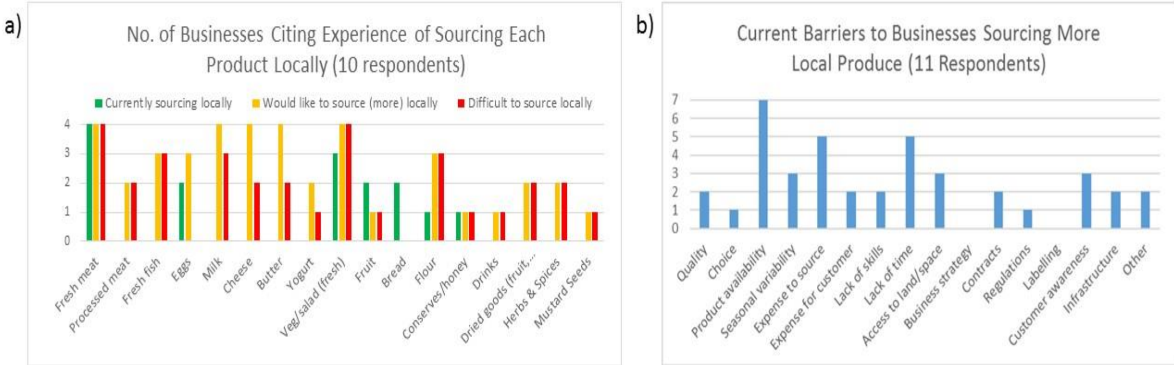

Figure 4 Experience of, and barriers to, sourcing produce locally

It is perhaps not surprising then that when discussing the use of a local food hub twelve respondents said they would be willing to take orders via a centralised ordering system in order to save time (Figure 5a.). There was no leading preference for ordering or taking orders via the phone, website or through a sales person (Figure 5b.), although it was stressed that this system should be balanced against the value of face-to-face contact in order to build and maintain relationships with suppliers and buyers, and the opportunity to see, taste and choose a high-quality product. Additionally, there was concern as to how to maintain business and product identity when trading via a hub rather than dealing directly with consumers (Tables 5. – 7., Appendix A).

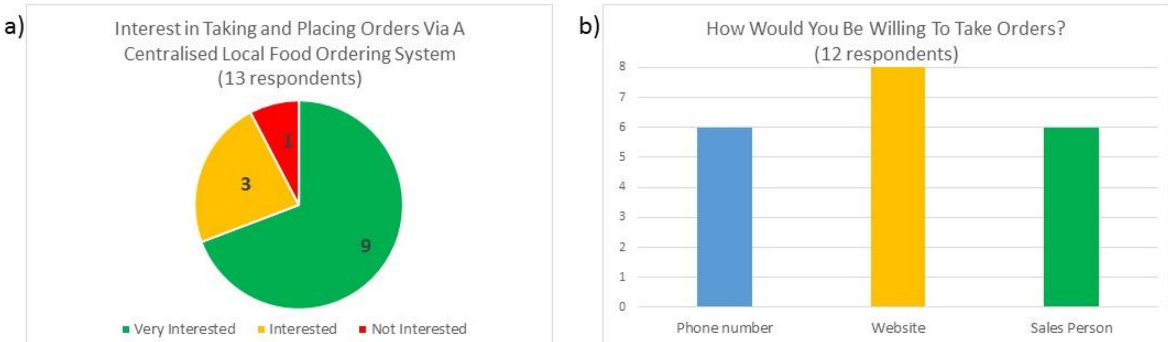

Figure 5 Using a centralised ordering system

Eleven respondents of the twelve who would use the hub thought a mark-up on the produce from the hub appropriate and necessary but, given the already tight product margins, that it would have to be a small enough amount to be able to ensure that neither producers nor consumers take a bit hit. There was a suggestion that the charge could be on a sliding scale for small and developing businesses; perhaps a proportion of their income until they achieve a certain turnover, or that the charge take the form of a membership fee. Some thought that the fee should go towards running a hub that truly benefited the local food system through added value services, rather than to just cover administrative costs and there seemed to be agreement that a hub enabling local, small businesses to expand whilst buying and selling local produce would not work run on a traditional corporate system and needed to operate in a more sympathetic format (Table 8., Appendix A).

The most needed services of the hub varied as it appeared that people had differing expertise and requirements (Figure 6.). For instance, some said they felt strong at business planning, managing food hygiene or marketing whilst others felt they lacked skills in these areas. This complements many respondents' desire for a forum for best practice, experience and resource-sharing providing the breathing space to think and discuss with others in a non-competitive networking environment (Table 9., Appendix A).

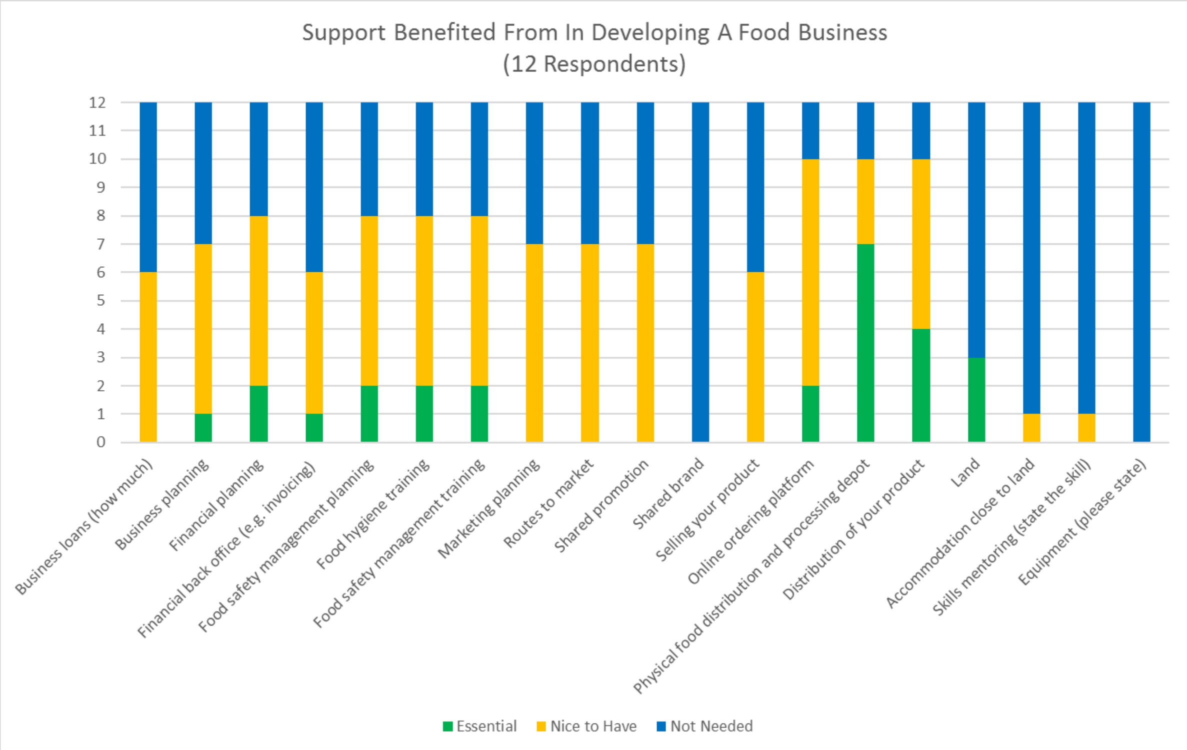

Figure 6 Developing a food business

Regarding a physical food hub site on the Oxford ring road, many respondents cited affordable space as a barrier to the expansion of local food businesses and seven respondents were interested in tenancy, although couldn't necessarily commit as their timing needs might not match the realisation of the hub. These included a potential dairy, an apple juice producer, a potential food surplus snack producer, a baker, a wholesaler and a food trainer and caterer. All respondents required the basics such as electricity, temperature control, lighting and drinking water but office, filing and meeting space was only cited as important by a few. It seems most businesses are computerised and thus can do administrative work from home and are happy to meet people in less formal settings. However, some tenants would require hot desking space to be used on an ad hoc basis and one tenant said training space would be very useful, particularly as they hope to expand their business and spread their values through the training and employment of secondary school students to sell their produce at various locations (Figure 7).

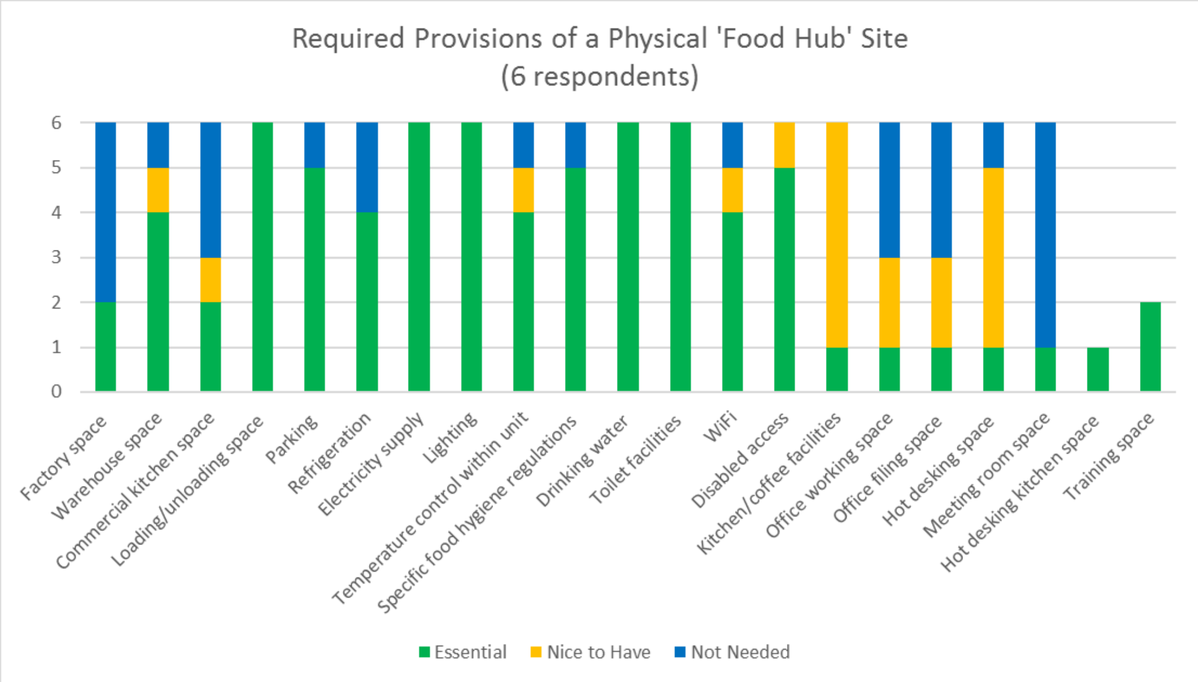

Figure 7 Provisions of a 'physical' food depot

Many who had no need of premises themselves were still enthusiastic about the idea of a physical food hub site (Table 10., Appendix A), with a view that a physical hub enables a supportive network as described above, as well as increased opportunity for marketing, showcasing and distribution of products. Indeed, the Making Local Food Work report 'An investigation into the workings of small scale food hubs' found that a physical space raised the profile of a food network in an area. Additional to this, respondents mentioned the advantages of space and equipment sharing and the value of short term use – even to the extent of hot-desking kitchen space - for smaller producers and those with more seasonal needs. Also discussed were the environmental benefits of sharing resources, both through the higher efficiency of shared premises and transport, and through the co-location of complementary businesses: for example, a vegetable wholesaler and apple juicer with a surplus fruit and vegetable snack producer, or a dairy with a cheesemaker.

In conclusion, both producers and buyers in Oxford are eager to expand and increase the local produce market but there are several common barriers to this, including a lack of time and labour, cost and product availability and affordable space. The results from this survey will inform the focus of further work by Good Food Oxford in increasing the amount of local food sold in Oxford. In particular, they will contribute to applications for funding for the building and initial running of a physical food distribution and processing space, and will inform the planning stages of this space to ensure that it best meets the need of Oxford's food community.

A comprehensive outline of all respondents' comments can be found below in Appendix A, with the survey script used in Appendix B. If you have any questions regarding our findings, or anything further to add or discuss then please contact Good Food Oxford: info@goodfoodoxford.org. If you are a local food producer or buyer and would like to contribute to the survey an online version can be found here: https://goo.gl/forms/zPRfPPGd3DdsCQYj2.

This survey and report were commissioned by Good Food Oxford, designed by Rosie Eccleston and Hannah Fenton, and implemented and authored by Rosie Eccleston.

Appendix A: Summary of Comments taken from Interviews

Table 1 What are the barriers, if any, to selling your products more locally?

Category	Comments
Local demand	• People might buy some products from local community & farmer's markets, but they don't use them for their staple shop.
Expense to customer	• The product must have a high cost due to one person doing the production, processing, marketing, logistics & distribution. • Cannot match other prices for the product, as they are not in fact fair prices, although there are still customers willing to pay a higher price for local. • People do not want to pay a lot of money for food and compare prices to those found in supermarkets.
Lack of skilled labour	• Necessary to be a 'jack of all trades' in a small local business with just one or a few people doing all the production, milking, processing, marketing, logistics & distribution. • Not enough labour to produce enough to meet demand, or from all the ingredients available locally. • Lack of knowledge as to how people make snacks from surplus, how they're sourcing waste, how food waste can be used etc.
Lack of time	• Just one or a few people spread very thin doing production, processing, marketing, logistics & distribution. • Time required for post-production effort, including preparation for market stall is huge compared to the scale of operations. • Difficult to do the marketing and reach the customer base one would like to when also trying to make a quality product. • Have been approached by supermarkets but can't meet their demand at the current scale. • A lot of time is required to just set up and make a food business happen.
Access to land/Space	• Space for production and storage is too expensive. • Affordable space could make the difference to solidifying ideas and getting the food business started.
Contracts	• Currently all local dairies have contracts. • Larger chain potential buyers are already tied in to contracts.
Regulations	• The audit required in order to supply larger chains and supermarkets is too time consuming. • Food waste legislation makes sale of food surplus and resulting products more complicated
Customer awareness	• Customers are often unaware that quality products handmade at a small-scale cost more. • Customers are often familiar with environmental issues (scientists and academics etc) so need to be able to answer these concerns. • People don't always understand that sourdough is a niche market, don't appreciate bread is not one mass market.

Other	• Customer perceptions and spending habits - market is more bijou and for socialising • Fear of losing identity - don't want to expand and sell to larger outlets to point where lose contact with production process and product identity • Managers of outlets – Already have favoured suppliers and don't see that in marketing terms the new product is different • What other organisations are selling at scale; similar size to local food to collaborate with

Table 2 Do you have any other comments or observations related to your experiences of selling produce locally?

Category	Comments
Sales	• People appreciate that local can cost more, but there is still a threshold as to what they will and can pay. • I already have links with the farmer's market and thus feel competent in talking to coffee shops and communities about local produce as there are lots of existing links. • Haven't had to push sales as I have existing audience and following through markets. • Local and handmade are good selling points and there are a growing number of discerning people, but the main concern is how to encourage people to buy local and support local businesses. • Need to educate that imported goods can be eaten as a treat. • Would be good to know other organisations that are selling at the same scale and are a similar size to allow collaboration in selling to meet local demand and in shared resources.
Customer satisfaction	• Producers can be perceived as unreliable as they cannot always quickly respond to demand and thus lose business. • Short life span of some product means cannot always produce excess in case of extra purchases; again seem unreliable. • All satisfied customers • When people taste product, they are often willing to pay more • We have created an ethos of daring to say 'no we don't have it, that's seasonal', and customers get used to that • Trying to bring michelin star product to a customer base that would otherwise never have access to it locally
Customer reliability	• We have loyal customers through the farmer's markets • Local businesses and outlets often claim to be selling local food, but in reality are not actually very interested. • Customers often prioritisie environmental, • Current income from a very varied customer base; not related to class or education. This diversity could be harnessed to raise the profile of local food, or used to identify social gaps yet to be engaged with.
Product wastage	• We claim to be supporting change to more sustainable and environmental, so as well as sourcing and selling local, sustainable and environmental produce we have to pay attention to food surplus as well

Customer product knowledge	• We have to manage customer perceptions and expectations of seasonality, especially with short life span products • A local economic situation (e.g. help support your local farmer who is being unsustainably exploited by current product) appears to more persuasive in changing behaviour than distant environmental impacts of food (e.g. flooding in Bangladesh) • Customers are becoming more aware of offer and benefits of local produce through exposure at local outlets • British people want the cheapest available food so perhaps customers need to be educates as to the price of quality and local produce • The environmental campaign aspect of food can be to intellectualised and excludes certain groups
Other	• I'm concerned that a lot of local food businesses ride on grants, which are OK for use in setting up but not for continuing to run. Businesses need to be able to manage the transition from set up to being self-sustaining. • It's all about building networks with local consumers and shops to find routes to market. • A vehicle is needed to showcase local producers local food establishments, and allow buyers to see and taste the product. As a sole employee there is no time to be continually doing this in isolation. • It's about educating the next generation; we have secondary school students employed and involved in sales and this is a good way to spread our message

Table 3 What are the current barriers, if any, for your business to source more local produce?

Category	Comments i.e. specific issue or product
Quality	• I require rare specialist knowledge and ingredients which I am unlikely to find locally • Quality wines and oils are difficult to source locally
Choice	• To consistently create high quality, affordable dishes
Product availability	• Although can grow mustard in UK not a huge amount is • The UK is not producing and what is produced is bought up by bigger companies with contracts • Lots of ingredients are not available or are not organic • Difficult to find organic locally for certain products • To consistently create high quality, affordable dishes • Options are limited in Oxford, with reduced product compared to London and other big cities. This includes more general ingredients (e.g. all that is available is expensive organic produce) not just specialised • As a small business it can feel like you are asking suppliers for a favour if you're not ordering in bulk
Seasonal variability	• We are at the mercy of the weather. An isolated event can lose a variety and pests are affected by weather. Bad years give lower quantity and less variety. • Inconsistency, unavailability and variability in produce from local suppliers

	• Seasonal variability in certain products puts farmers off growing as not certain they can sell all the surplus; likewise buyers want reliable suppliers
Expense to source	• Too expensive when competing with larger buyers • Ingredients that can be sourced locally are often more expensive • To consistently create high quality, affordable dishes • The only veg available locally was organic which we can't afford; we also tried to source meat locally but again this was too costly; we could serve a lot more people but can't afford to source ingredients locally.
Expense for customer	• Don't understand cost of meal or product prepared with local ingredients • Need to keep product within customer budget, which is difficult using local produce for a small or developing business.
Lack of skills	• Knowledge of maintaining and managing apple trees is being lost. • Suppliers are not very good at getting set up for supplying charitable causes, which can take time.
Lack of time	• A lot of labour and time goes in to picking apples, as opposed to buying in apples from further away/afar • No time to clean etc so needs to be usable product already • To source local suppliers and check supply chain • To deal with extra processing required e.g. wash and prep carrots and potatoes • Can be a hassle and not convenient to have to source and buy from several local suppliers rather than one wholesaler
Access to land/space	• We used to make mixed fruit ourselves but had to stop as don't have the premises but plan to start making own brand of granolas again • Oxford needs a convenient local food hub for processing and dealing with food surplus; this would help collect, use up and deliver surplus to give farmers more certainty they can sell what they grow for local consumption. • We have done the rounds of Oxford looking for a kitchen share but what is out there doesn't suit our kitchen needs; we need a site where something can be tailormade.
Contracts	• Almost all British-grown mustard is contracted to Colmans • We are tied to producers, especially for drinks
Regulations	• Although a lot of lip service is paid to local and homemade produce there are no trading standards so it can be confusing or even misleading; common terms need to be evolved.
Customer awareness	• Of product quality compared with cheaper alternatives • Clear terms and education of customer as to what is local; this is currently confusing and misleading so can be off putting • Disconnect from produce supply chain can lead to less reponsible behaviour e.g. increased meat consumption when removed from slaughtering
Infrastructure	• Lack of abattoir near Oxford means even if meat is locally reared it is transported to be slaughtered and then brought back

	• Accessiblity into the centre of Oxford is poor and this makes sourcing from local suppliers located there difficult and time consuming
Other	• Problems with supply chain and transparency mean that ethical and environmental concerns prevent sourcing locally. i.e. can be more environmentally friendly not to be local, or problems with supply chain mean that the money is not going to the people that matter • Pockets of the country are better for different products, and welfare and high quality can be equal or greater priority than local

Table 4 Do you have any other comments or observations related to your experiences of sourcing produce locally?

Category	Comments
Quality	• Good quality
Product availability	• Concerned about the long term supply of apples in Oxford as trees age and knowledge of growing and maintaining is lost. I am looking to establish plantations. • Not enough milk available locally to meet our demands
Supplier Reliability	• Unreliable • It can be difficult to build and maintain relationships with busy or inconsistent local producers • Local growers buy in to bulk out their own products, which encourages buying from local producers as their supply is more reliable if not 100% local • Can use suppliers that when local supply is low have a back up e.g flours aren't always local, but bulk up with produce from Denmark when necessary
Supplier response to demand	• An online platform (like OLIO) as well as a physical food hub site would increase the connect between supply and demand but this needs to build a critical mass and be well managed to work • Local suppliers do not approach businesses face to face and so can be hard to source
Other	• I have a very individual and novel way of operating business, thus so are the barriers and opportunities • We would love to source produce locally • We would like local producers to become more pro-active in making contact with retailers • Our priority is local, with some organic but not fully committed and 70% vegetarian. We find ways to use waste and be flexible e.g. seasonal greens, baking with veg and are gradually building up a local product base • Commitment to local produce and local suppliers provides a social circle which is enriching and makes the business an identity rather than just doing it for a bottom line profit.

Table 5 How interested would you be in taking and placing orders via a centralised local food ordering system?

We would be very interested if the price was right and good quality
Anything simple and informative is useful
We would use this particularly for the consumer side of the business
I might use this for some ingredients, but this would depend on cost
I'm open to the idea but it would need to be simple and also be balanced against the value of face to face contact
Difficult for a small dairy to respond to spontaneous customer orders via such a system due to the short life span of products
This system appeals logistically when catering for events

Table 6 Would you be willing to take and place orders using this system via a phone number, a website or a sales person?

I like the simplicity of a phone number and a quick phone call
I would want to check the product out, and need to be sold on it before I order it the first time
I would probably use a combination of methods
I would take consumer orders online but communicate with producers on the phone

Table 7 Would your business be potentially willing to collect goods from and deliver to a local food depot on the ring road?

An incentive for collection could be implemented
Could borrow cars or use pedal and post in order to collect and deliver
Would be good if the hub could harness cycle power
Happy to collect from a single well-located hub; anything that saves time
I could drop off pints for businesses via the hub, but for individual customers I'd prefer to keep a personal milk round service

Table 8 Would you consider it appropriate for a hub to charge a mark-up or fee for this service?

Already marked up by 70% so not much room for additional mark up.
Yes, but revenue should go to fund other hub activities, not to simply cover admin costs
The hub has to be charged for as it needs to be self-maintaining in order to create change; however local/organic/ethical produce can't be successful and widespread in a traditional aggressive, commercial, capitalist environment e.g. Worton organic garden is run on a friendly ethos including rates of rent etc.
A mark up is appropriate as it is a service that saves time
As a general rule 50%is already added on by retailers to wholesale so a marjk up cannot be too much as someone in the chain is going to end up taking a hit
A small mark up within the profit margin is appropriate
Appropriateness of mark- up depends as there will probably be a variety in ability to pay. This could therefore be done on a sliding scale, perhaps as a proportion of income, and be seen as an investment on the part of the hub.
Yes, but no more than 10p per pint of milk
Yes, but this has to be within a fair range for the producer whilst maintaining an affordable product
Within a reasonable range as a mark up, or as a membership fee including access to the other hub services (delivery, training etc)

Table 9 What support would you benefit from in developing your food business?

We're already using the council for business loans and planning
Would be good to find a breathing space to think about marketing and discuss with others in a non-networking or competitive environment. Could be an online forum or monthly/quarterly meet up.
There is a need for best practice sharing
A depot as a portal for selling locally is what we need
Land is expensive
The marketing support offer is saturated; need to transform what there is rather than offer more.
Business, finance and marketing are already offered as paid for services
Main barrier to expansion has been premises, which are difficult to find, costly to convert into kitchen space and hard to move into
Business support needs to be continued past set up i.e. how to expand and sustain
Currently, dealing with environmental planning is very ad hoc
Marketing planning would be useful, including help through word of mouth and face to face relationships
Need more training in social media
Any available land is currently swallowed up by established farms
Currently accommodation next to land is not even thought about as too difficult to find
Would like there to be more sharing of resources and expertise rather than individual mentoring
We don't need food hygiene now as have done it already but at the time we had no support and so sourced own training; keen to share experience and help others

Table 10 Have you had access to any of these services from other sources?

Category	Comments
Local food organisation	• Heart of England Fine Foods – they gave a lot of support in environmental issues and marketing but they couldn't sustain themselves once their funding ran out. • GFO
Local business support organisation	• Independent Oxford – a monthly forum of a few people but more of a commercial agenda. • Bigteacher.com have offered food hygiene training
Local council	• Approached by Rebecca Hawkins of Oxford County Council and Foodwise offering to help reduce energy use and waste • City council environmental health - pretty efficient, pointed us in the right direction and were keen to help setting up and be involved throughout the process. • Have emailed the council but received quite bizarre responses, with lack of detail • There is a lack of consensus on the council and environmental health bodies as to what works
Other	• No support from any of these making it quite lonely. Feels like the system is very stacked against you although there is access to reasonable finance planning and access to advice on regulations. • Environmental health has been difficult – this falls within OCC jurisdiction and it seems the city council has no experience of food processing and their regulations have been a barrier to setting up. Assistance in the other direction i.e. from food hub to council would be useful to ensure they have a general idea of food hygiene law and food businesses.

Table 11 Which provisions of a physical 'food hub' site would be needed in developing your food business?

We need serious gas hobs, good extraction systems, oven, steaming, space to customise. Unlike more traditional kitchens we don't need a great big oven, just very powerful gas rings.
A dedicated food hub could make it easier to comply with food hygiene if it has been purpose built and already taken requirements into account. This can be a huge amount of stress and takes time.
I have no doubt a physical food hub would work, and that we are not alone in struggling to find somewhere; can give testimonial
Especially relevant as there are now a lot of new types of operating with more street food and handmade produce.
A physical hub would be beneficial for inspiration and community as well as space
Managing ownership and power etc would be challenging
The hub could provide more opportunities for showcasing produce; community markets can be quite closed off and saturated
Demo kitchen events such as those at Wallingford; supplied by local producers and complement local products
Rent amount could depend on the stage of business e.g. a percentage of turnover if established, on a sliding scale for incubators/new businesses as they expand; Use - dependent on timing, but very keen for the benefit of shared resources, distribution and delivery

Whether I rent a unit is dependent on timing but I am very keen for the benefit of shared resources, distribution and delivery
We have all our own kitchen equipment in storage, just need premises

Table 12 How much, if any, of each of the following waste and by-products are produced or do you expect to produce as a result of your food business?

Waste/By-Product	Further relevant details and disposal method
Water	Plumbed in waste system essential Lots of water used
Noise	Some low level from machinery
Reusable product e.g. wonky veg	Glass bottles
Unusable product e.g. faulty	Whey, although could eventually co-ordinate this being used by cheesemakers
Hazardous/regulated waste	Wash down from the milk

Appendix B: Survey Script for Secondary Producer Interviews

About Your Business

****Prefill and confirm****

1. Basic Info
    a. Name…
    b. Type of Business…
    c. Address…
    d. Telephone…
    e. Email…

My name is Rosie, and I am contacting you on behalf of Good Food Oxford. As I mentioned in my email GFO is a network of 130 organisations working together for a healthy, fair, sustainable and tasty food system for Oxford.
I'm contacting you as we are currently investigating the value of local food. I really appreciate the opportunity to discuss this with you, and I'd like to get an idea of your current relationship with, and experience of, selling or sourcing local food and what you perceive to be the barriers and opportunities to increasing the amount of local food sold in Oxford.
Before we start can I just check that this is........(name of organisation) and that you are at.......(address) Write down address, if incorrect.

2. What is your role in the business?

3. What is your business' main activity? ****Probe then prompt****
    1. Farming
    2. Food manufacturing
    3. Food wholesaler
    4. Food distribution
    5. Food retailing
    6. Food service

4. Do you mind telling me what is your annual business turnover?
    1. 0 - 50K
    2. 50 - 100K
    3. over 100K

5. What is the number of employees in your business?
    a. Full time
    b. Part time (how many hours)?
    c. Casual/seasonal (how many hours)?

****Calculate FTE when finished****

Selling Produce

6. What is your approximate annual sale of food products in pound sterling?

7. Could you give me an estimate of what percentage of this is food sold to other local businesses (i.e. within 50 miles of your site/Oxford)?

8. Which products do you produce and at what frequency and volume? Do you sell any of these locally? ****Probe then prompt****

Product	None, Daily, Weekly or Monthly **N,D,W,M**	Approximate volume	Currently selling locally **3**	Would like to sell locally **2**	Difficult to sell locally **1**
Fresh meat					
Processed meat					
Fresh fish					
Eggs					
Milk					
Cheese					
Butter					
Yogurt					
Veg/salad (fresh)					
Fruit					
Bread					
Cakes/biscuits					
Flour					
Conserves/honey					
Drinks					
Other					

9. What are the barriers, if any, to selling your products more locally (within a 50 mile radius of your site/Oxford)? ****Probe, don't prompt****

Category	Mentioned? Y or N	Comments i.e. specific issue or product
Local demand		
Expense to customer		
Lack of local outlets		
Marketing		
Lack of skilled labour		
Lack of time		
Access to land/Space		
Business strategy		
Contracts		
Regulations		
Labelling		
Customer awareness		
Infrastructure		
Digital Technology		
Other		

10. Do you have any other comments or observations related to your experiences of selling produce locally (within a 50 mile radius of your site/Oxford)? **** Probe, don't prompt ****

Category	Mentioned? Y or N	Comments
Sales		
Customer satisfaction		
Customer reliability		
Product wastage		
Product service/customisation		
Product range		
Customer product knowledge		
Other		

Sourcing Produce

11. What is your approximate annual purchase of food products in pound sterling?

12. Could you give me an estimate of what percentage of this is food currently procured locally (i.e. within 50 miles of your site/Oxford)?

13. Please list the top five businesses from which you currently purchase your food items
    1.
    2.
    3.
    4.
    5.

14. Which products do you purchase and at what frequency and volume? Which of these, if any, do you source locally? ****Probe then prompt****

Product	None, Daily, Weekly or Monthly **N, D, W, M**	Approximate volume	Currently sourcing locally **3**	Would like to source locally **2**	Difficult to source locally **1**
Fresh meat					
Processed meat					
Fresh fish					
Eggs					
Milk					
Cheese					
Butter					
Yogurt					
Veg/salad (fresh)					
Fruit					
Bread					
Cakes/biscuits					
Flour					
Conserves/honey					
Drinks					
Other					

15. What are the current barriers for your business to source more local produce i.e. that produced within 50 miles of your site/Oxford? ****Probe, don't prompt****

Category	Mentioned? (Y or N)	Comments i.e. specific issue or product
Quality		
Choice		
Product availability		
Seasonal variability		
Expense to source		
Expense for customer		
Lack of skills		
Lack of time		
Access to land/space		
Business strategy		
Contracts		
Regulations		
Labelling		
Customer awareness		
Infrastructure		
Other		

16. Do you have any other comments or observations related to your experiences of sourcing produce locally? **** Probe, don't prompt ****

Category	Mentioned? (Y or N)	Comments
Quality		
Choice		
Product availability		
Supplier Reliability		
Supplier response to demand		
Other		

Using a Local Food Hub

17. How interested would you be in taking and placing orders via a centralised local food ordering system in Oxford on a scale of 1 to 5, with 1 being not interested at all and 5 being very interested?

18. ****If interested**** how willing would you be to take and place orders via a centralised local food ordering system, on a scale of 1 to 5 with 1 being unwilling and 5 being definitely willing?
    - □ Phone number
    - □ Website
    - □ Sales Person

19. Would your business be potentially willing to collect goods from and deliver to a local food depot on the Oxford ring road?
    1. Able to deliver/collect from depot
    2. Delivery/collection to own premises preferred
    3. Delivery/collection to own premises essential

20. Approximately what percentage mark-up would you consider appropriate for a hub to charge for this service (from zero upwards)?

Expanding Your Business

This section is about developing your business, within the context of sourcing and selling more locally.

21. What support would you benefit from in developing your food business? ****Probe, then prompt****

		Essential (1)	Nice to Have (2)	Not Needed (3)
a.	Business loans (how much)	☐	☐	☐
b.	Business planning	☐	☐	☐
c.	Financial planning	☐	☐	☐
d.	Financial back office (e.g. invoicing)	☐	☐	☐
e.	Food safety management planning	☐	☐	☐
f.	Food hygiene training	☐	☐	☐
g.	Food safety management training	☐	☐	☐
h.	Marketing planning	☐	☐	☐
i.	Routes to market	☐	☐	☐
j.	Shared promotion	☐	☐	☐
k.	Shared brand	☐	☐	☐
l.	Selling your product	☐	☐	☐
m.	Online ordering platform	☐	☐	☐
n.	Physical food distribution and processing depot	☐	☐	☐
o.	Distribution of your product	☐	☐	☐
p.	Land	☐	☐	☐
q.	Accommodation close to land	☐	☐	☐
r.	Skills mentoring (state the skill)	☐	☐	☐
s.	Equipment (please state)	☐	☐	☐
t.	Other planning (please state)	☐	☐	☐
u.	Other training (please state)	☐	☐	☐
v.	Other services (please state)	☐	☐	☐

22. Have you had access to any of these services from other sources? ****Probe, don't prompt****

Category	Mentioned? Y or N	Comments
Local food organisation		
Local business support organisation		
Local council		
Supplier Reliability		
Local economic partnership (LEPs)		
DEFRA		
Other		

We are investigating the viability of a physical food hub site, to be located on the Oxford ring road. This would be a processing and distribution hub, which would co-locate complementary food businesses.

23. Is this something that would be relevant to you?

Yes	Are you happy to continue to for another ten minutes to discuss what would be most beneficial to you in a potential food hub? Go to Q. 24
No	Comments as to why not. Thank you and feedback.

24. Which provisions of a physical ‘food hub’ site would be needed in developing your food business? ****Probe, then prompt****

	Essential (3)	Nice to Have (2)	Not needed (1)
a. Factory space	☐	☐	☐
	Please specify floor space …… and height clearance…..		
b. Warehouse space	☐	☐	☐
	Please specify floor space …… and height clearance…..		
c. Commercial kitchen space	☐	☐	☐
	Please specify floor space …… and height clearance…..		
d. Loading/unloading space	☐	☐	☐
	Please specify floor space …… and height clearance…..		
e. Parking	☐	☐	☐
	Please specify floor space …… and height clearance…..		
f. Refrigeration	☐	☐	☐
	Please specify floor space …… and height clearance…..		
g. Electricity supply	☐	☐	☐
	Please specify if this should be metered or otherwise …		
h. Lighting	☐	☐	☐
	Please specify requirements …		
i. Temperature control within unit	☐	☐	☐
j. Meet specific food hygiene regulations	☐	☐	☐
	Please specify…		
k. Drinking water	☐	☐	☐
	Please specify if this should be metered or otherwise …		
l. Toilet facilities	☐	☐	☐
m. WiFi	☐	☐	☐

n. Disabled access
☐ ☐ ☐

o. Kitchen/coffee facilities
☐ ☐ ☐

p. Office working space
☐ ☐ ☐
Please specify number of desks…

q. Office filing space
☐ ☐ ☐
Please specify how much…

r. Hot desking space
☐ ☐ ☐
Please specify number of desks and frequency of use…

s. Meeting room space
☐ ☐ ☐
Please specify capacity…

t. Other
☐ ☐ ☐
Please specify …

25. How much, if any, of each of the following waste and by-products are produced or do you expect to produce as a result of your food business?

Waste/By-Product	Number/ volume/amount	Further relevant details and disposal method
Wooden crates		
Cardboard		
Plastic packaging		
Water		
Surplus heat energy from machinery		
Noise		
Reusable product e.g. wonky veg		
Unusable product e.g. faulty		
Hazardous/regulated waste		
Other (please state)		

Thank you very much indeed for your time!
****** Sign off about feedback ******