



Appendix 15

## **Marketing Survey**

# **Produce marketing report:**

## **Survey of outlet demand for organic herbal products, fruit and vegetables, dairy products, processed organic products and meat in east Pembrokeshire, west Wales**

*29<sup>th</sup> March 2007*

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### **Purpose of report**

To determine what demand there is for locally produced organic herbal products, fruit and vegetables, dairy products, processed organic products and meat in east Pembrokeshire, west Wales. In addition to identify outlets prepared to source goods from residents of Llammas Tir y Gafel, and to identify particular gaps in the market.

### **Key findings**

#### ***Local outlets have expressed a demand for, and willingness to source:***

- Organic fruit and vegetables (Matthew and Chris Young, Aardvarks Wholefoods, Go Mango Wholefoods, Organics to Go, Harvest Stores, Wholefoods of Newport). In particular there is a need for: salad, parsley, watercress, and exotic fruit
- Organic meat – almost most the outlets surveyed were vegan or vegetarian, those that were not were interested in buying organic meat, particularly chicken and duck (Aardvarks Wholefoods, Ken Davies Family Butcher)
- Organic beer and wine (Go Mango Wholefoods)

#### ***Local outlets said there was some, but limited demand (i.e. limited margins) for:***

- Organic medicinal herbs (Go Mango Wholefoods, Wholefoods of Newport)
- Organic medicinal and culinary herbs (The Owls Wisdom, Aardvarks Wholefood)
- Organic dairy products – most already had a number of good suppliers. Many relied upon Rachels' Dairy or Yeo Valley, and had had mixed success with local suppliers. Aardvarks and Wholefoods of Newport would be willing to take new products on board. There was little demand for organic milk as this is now so freely available.

***Local outlets said they had trouble selling/ there was a limited market in:***

- Organic cooked/ processed foods – most did not have big enough storage facilities to stock such products. Aardvarks had found a market for organic pasties and pies, but had not sold enough to make good enough margins. Several had tried different products and Aardvarks and Wholefoods of Newport would be willing to try new products, but they were not overly optimistic.

***Most outlets said that any supply would have to be of:***

- Good quality
- Good price
- Reliable consistency
- Year round supply
- Not rely upon one outlet to buy all the supply, only small quantities were likely to be needed by each

**Methods used**

During the week beginning 26<sup>th</sup> March 2007, 10 outlets (listed in the table below) were contacted by telephone. They were asked to take part in a small survey on the demand for organic produce being conducted by Leicester University in support of the Lammas low impact development proposal at Glandwr. They were asked a series of questions (see Appendix for full list).

<b>Outlet</b>	<b>Location</b>	<b>Phone number</b>
Matthew and Chris young organic fruit and veg	Glandwr	01994419481
Aardvarks wholefood	Carmarthen	01267 232497
Bwyd y byd wholefoods	Crymych	01239 831537
Go mango wholefoods	Cardigan	01239 614727
Harvest Stores	Narberth	01834 861022
The owls wisdom	Newcastle Emlyn	01239 711729
Riverside health	Newcastle Emlyn	01239 711440
Wholefoods	Newport	01239 820773
Organics to Go	Crymych	0800 458 2525, 07974 105296
Ken Davies Family Butchers	Crymych	01239 831978

**Raw data**

Attached as an Excel file – Lammas Marketing Survey March 2007

## **Appendix**

Questions asked during survey

### **1. Herbal products**

- Do you supply herbal products?
- Is there a demand for locally sourced herbal products?
- Would you be interested in stocking organic local herbal products?
- Are there any particular gaps in the market that you are aware of?

### **2. Organic fruit and veg**

- Do you supply organic fruit and veg?
- Is there a demand for locally sourced organic fruit and veg?
- Would you be interested in stocking organic local fruit and veg?
- Are there any particular gaps in the market that you are aware of?

### **3. Organic cooked/ processed foods**

- Do you supply organic cooked/ processed foods?
- Is there a demand for locally sourced organic cooked/ processed foods?
- Would you be interested in stocking organic local cooked/ processed foods?
- Are there any particular gaps in the market that you are aware of?

### **4. Organic dairy products**

- Do you supply organic dairy products?
- Is there a demand for locally sourced organic dairy products?
- Would you be interested in stocking organic local dairy products?
- Are there any particular gaps in the market that you are aware of?

### **5. Organic meat**

- Do you supply organic meat?
- Is there a demand for locally sourced organic meat?
- Would you be interested in stocking organic local meat?
- Are there any particular gaps in the market that you are aware of?

Produce marketing survey for Lammas											
29.03.07, Jenny Pickerill	Outlet	1	2	3	4	5	6	7	8	9	10
<a href="#">Good/ interesting news in blue</a>	Matthew and Chris Young Fruit and Veg Glandwr 01994419481	Aardvarks Wholefood Carmarthen 01267232497	Bwyd y byd wholefoods Crymych 01239 831537	Ken Davies Family Butchers Crymych 01239 831978	Go Mango wholefoods Cardigan 01239 614727	Organics to go Crymych 0800 458 2524	Harvest Stores Narbeth 01834 861022	The Owls Wisdom Newcastle Emlyn 01239 711729	Riverside Health Newcastle Emlyn 01239711440	Wholefoods Newport 01239820773	
<b>Herbal products</b>											
<i>Do you supply ... ?</i>	No	Yes	Only in the form of supplements		Yes	Yes, herbal teas	Yes, mix of organic and non-organic	Yes	No	Yes	
<i>Is there demand for ...?</i>		Yes, they sell dried herbs, but not much organic. Had an organic supplier but they stopped, have promised it to a new person, but overall it is not profit making			Yes	Yes					Yes, have a tie-in with the Natural Health Centre in Newport who have herbalists. They often send round customers
<i>Are you interested in stocking ...?</i>		Already working with slim margins and signed up a new supplier, but maybe in the future	No		Maybe, currently buy all from Coltswold Health. Currently moving to all organic herbs (medicinal and culinary), so looking for suppliers	Yes	Yes, but very specialist	Yes			
<i>Are there any particular gaps in the market that you are aware of?</i>					Need for organic medicinal herbs, finding it hard to source these	No	Not really, have enough suppliers	Not really a big enough market. Only get enquiries every few weeks and herbs died inbetween	Yes, but could not be specific on what products would be interested in		Yes
<b>Organic fruit and vegetables</b>											
<i>Do you supply ... ?</i>	Yes	Yes	Yes		Yes	Yes, currently at capacity.	Yes	No, shop too small	No	Yes, everything they sell is organic	
<i>Is there demand for ...?</i>	Yes	Yes	Small, threat from supermarkets		Yes	There is currently more demand than supply	Yes, definitely	No		Yes	
<i>Are you interested in stocking ...?</i>	Yes, as long as of a good enough quality, already take from most of local suppliers	Yes, buy from wholesaler, and excess from some locals. Label food as either organic (if have Soil Association) or local (if not Soil Association but local supplier)	Maybe/ No		Yes. Currently buy from range of different and small suppliers.	Yes, need more suppliers for all fruit and veg.	Yes, she needs better quality. Often only gets poor quality by the time it has reached West Wales	No			Maybe, Currently get most of supply from Matthew and Chris in Glandwr, so wouldn't want to cut them out.
<i>Are there any particular gaps in the market that you are aware of?</i>		Need parsley and watercress, and quality salad ALL year. Need salad most in the middle of winter. Need (a) Quality, (b) Continuity, (c) not rely on her as only outlet			Always interested in suppliers who could provide out-of-season organic produce			Exotic produce - Mangos and pineapples			No
<b>Organic cooked/ processed foods</b>											
<i>Do you supply ... ?</i>	No	Not much, sell locally made biscuits (fig rolls)		Yes (but not organic, make their own sauces and pickles)	Yes	No	Yes, but only a small fraction as organic		No	Yes	
<i>Is there demand for ...?</i>		Yes, but only sell up to a point, never in great quantities. Had pasties and pies (organic) and sold, but not sold enough to make it really viable.			Not much		Not really. Not a big shop. She felt that if she could sell home-made organic pasties or other take out foods that they would sell well but she does not have the storage facilities to do that. Not really interested in sauces etc.			Yes	
<i>Are you interested in stocking ...?</i>	Yes	No			Not really unless proven sellers. Only sell a very limited range as small shop with limited shelf-space.		No			Yes	

Are there any particular gaps in the market that you are aware of?			New types of products - like Honey comb, that are not currently supplied		No	No			No
<b>Organic dairy products</b>									
Do you supply ... ?	No	Yes, milk, yoghurt and cheese (local producer), Rachels and Yeo Valley, also a new organic yoghurt soft cheese (selling well)	Yes - Rosebush cheese (but not organic)		Yes, very limited supply of organic butter and yoghurt	No	Yes, yoghurt, cheese and eggs. Not milk as that is too freely available elsewhere in town	No	Yes, milk, cheeses especially. Mostly local suppliers
Is there demand for ... ?		Yes	Yes		No, as is a vegan shop		Not really		Yes
Are you interested in stocking ... ?		Yes	No		Not really		Currently buys all products from Rachel's Dairy. People have approached her and she has tried to sell products on sale or return but it has not gone well. Might be willing to try again but is cautious and cannot afford to have stock that isn't selling.		Yes, if quality, price and reliability was right
Are there any particular gaps in the market that you are aware of?					No		No		
<b>Organic meat</b>									
Do you supply ... ?	No	Yes, also goose and duck eggs	No	Yes, some (2 bodies a week)	No, vegan shop	No	No, vegan shop	No	No
Is there demand for ... ?		Yes		Yes					
Are you interested in stocking ... ?		Yes	No	Maybe, currently all supply from local farmers and have enough. However, was interested in organic meat but it would depend on the price					
Are there any particular gaps in the market that you are aware of?		Need chicken and duck meat							
<b>Additional comments</b>	Local wholesaler of organic fruit and veg	Been a running concern for 12 years, and has noticed the shift towards local rather than just organic and thus an emphasis on food miles and the use of www.bigbarn.co.uk. She is very supportive of Lammas, very friendly and said anyone could get back in touch with her. She said that the key to survival was (a) find a niche, (b) have a wide number of outlets. Those that have folded relied simply on her shop as their only outlet and thus demand was not high enough.	Rather unfriendly (when I visited in person and on the phone)		Have trouble sourcing small supplies of organic beer and wine. Already have local cider suppliers, but would be interested in organic larger, bitter and wine		Is expanding, so is interested in more organic products (but no specifics). Currently sells organic grains, pulses, sugars and coffees.	Does not sell organic produce	