



WHY REGIONAL FOOD SYSTEMS ARE THE FUTURE

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This report was originally written for the National Food Strategy as evidence to prove the essential role that local food plays in building a fairer and more ecological food system.

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Executive Summary

The report aims to illustrate the market failures of the supermarket supply system, caused by a deep imbalance of finance and power, and concentration of market control in the hands of only a few supermarkets. The report highlights the benefits of local food systems to address these market failures, with benefits ranging from economic and environmental resilience to cultural diversity and social connection. These advantages are particularly important in the wake of the Covid 19 pandemic and its revelation of the inherent inequalities in the supermarket supply chain and the environmental degradation it leaves behind. The report shows how redistributing market share of the food system more fairly between supermarkets and local food systems would address pressing issues in six key areas: **Economy, Environment, Waste, Food Justice, Health and Culture.**

ECONOMY

Local food systems are flexible and resilient to unanticipated shocks. They expand local economies, create jobs and support producers by distributing the price of a food item more fairly along a shorter supply chain.

ENVIRONMENT

Local food systems engender better environmental performance, delivering significant benefits for biodiversity, soil health and animal welfare and mitigating climate change through lower greenhouse gas emissions.

WASTE

Local food systems shorten the time between harvest and sales, reducing overproduction and losses in the supply chain. These decentralised systems also foster a relationship between farmers and consumers, which promotes an acceptance of a variety of produce.

FOOD JUSTICE

A localised food economy creates a resilient community, one that can produce enough good calories in the local area to withstand systemic disruptions and ensure that healthy, sustainably produced food is accessible and affordable to everyone.

HEALTH

Agroecologically produced food has reduced heavy metal and pesticide residues, as well as higher levels of antioxidants. Local food models also help to address physical and mental health issues by providing opportunities for social connection and access to green spaces.

CULTURE

Local food systems re-establish the connection between consumers and their food, which strengthens the cultural identity of a place and its people. This is contributing towards farming once again becoming a dignified and sociable livelihood.

The report also explores the potential role of decentralised food systems in the public procurement market. Using Dynamic Purchasing Systems, these local supply systems could provide sustainable, regional food and their associated benefits across the social care sector.

The report concludes that:

- The supermarket supply system is leading to inefficient distribution of tangible (food) and intangible (health of people and the environment) goods to all of society.
- It is the role of the state to tackle this market failure, and ensure that everyone in the UK enjoys the right to good food, that the environment is protected and primary producers are able to stay in business.
- The decentralised supply system has the potential to play a far greater role in supplying food, but is currently constrained by the power of supermarket competition.
- It is essential that food remains affordable and accessible to everyone and that present inequalities in access to healthy food are addressed.

It makes the following policy recommendations:

- National targets for local food production and distribution: an 80% domestic and 20% imports food supply vision with independent, local food businesses having a 25% market share by 2030.
- A local food infrastructure fund that facilitates access to safe and nutritious food for at-risk populations. The fund would also stimulate a thriving local food business economy by investing in cooperatively managed infrastructure.
- Public procurement to reorient institutional food services around providing food that is healthy, local and sustainably produced, using dynamic procurement methods to give smaller suppliers access to public procurement contracts.
- Planning Policy and Local Business Rates applied to:
 - » Control the spread of supermarkets and support healthy competition between independent food retailers



- » Encourage the production of food in Green Belt areas to supply local populations
- » Address food deserts by creating supportive environments for social enterprises and independent food businesses.
- Recommend that the Competition and Markets Authority should review whether the relaxation of Competition Laws during the pandemic had a negative impact on consumers, suppliers, and small, independent retailers and ensure that any negative impact is reversed.

The report also suggests actions the public can take:

- Contact MPs and ask them to support local food in your area.
- Consider where your food comes from.
- Support local growers and producers through farmers markets, local independent retailers, box schemes and CSAs.
- Share this report with your family and friends and have open discussions about the food you eat.

1.

Introduction





Local food systems and short supply chains have co-existed with the modern, globalised supermarket supply system for decades, but they only control a small percentage of the market share. Although supermarkets are considered convenient, with their constant, diverse supply of 'cheap' food products, such benefits have hidden costs. The COVID 19 pandemic has revealed the fragility of long food supply chains¹ and highlighted the cracks in our food system.

In the UK, our food system is defined by three main issues: deepening food insecurity, poor health and environmental degradation. These failures are grounded in a food system whose first concern is the free market economy and the expansion of transnational corporations.² This 'corporate food regime' has its roots in the late 1970s: as agriculture and finance grew to an international scale, power shifted from the state to international financial institutions and corporations.³ These establishments focused on the removal of all cultural and political barriers in order to ensure the free flow of capital in the agricultural sector.⁴ As the influence of private companies increased, supply chains became consolidated, leading to the 'supermarket revolution'⁵ and a handful of corporations running the show.

Today, just eight companies control 80% of the UK's food supply.⁶

The concentration of the market in the hands of only a few supermarkets is exacerbating a deeply ingrained imbalance of finance and power,⁷ which is leading to a series of market failures:

- The limited size of the market means supermarkets can set their prices against their competitors, which leads to the lowering of farm gate prices and limits farmers' choice.⁸ This 'race to the bottom' led to the closure of 33,500 farm holdings in the UK between 2005 and 2015.⁹
- Farmers' production costs are barely covered by the price they receive.¹⁰ Farmers receive an average of 8% of the money spent on a product:⁸ the majority of the Gross Value Added (GVA) is absorbed by the middle of the supply chain.⁷
- Farmers and producers have to absorb the costs of unfair supermarket trading practices including the last minute cancellation of orders, invoice deductions, unexplained fees⁸ and the cost of wasted produce due to cosmetic faults.¹¹

- As the international food system has developed, UK farmers have been forced to compete with global market prices and producers who are not required to meet the same environmental, labour and animal welfare standards. This has forced farmers to focus on capital-intensive production, coercing them down a path of agri-chemicals and intensive animal welfare methods.¹⁰

Market failure occurs when individual incentives do not lead to the right outcomes for the group.¹² Right now, the UK food market is dominated by an exclusive, profit-orientated supermarket supply system that is not focused on ensuring the efficient distribution of benefits and costs across society.¹⁰

Food poverty in the UK is increasing year after year: approximately 8.4 million people struggle to get enough to eat and 4.7 million go a full day without eating.¹³ This has been further brought to the fore by the Covid 19

pandemic, which has seen the levels of UK food insecurity quadruple to 16% of the population.¹⁴

Decentralised routes to market have the potential to make fresh, nutritious food accessible to people of all incomes. The pandemic has seen a surge in demand for local food and projects that address food poverty. The number of weekly veg boxes has doubled. 65% of box schemes are prioritising key workers, the vulnerable or those self-isolating and 10% of the schemes have created systems that support the economically vulnerable.¹⁵

A consequence of the pandemic could and should be the national recognition of our need for a greater connection to local, sustainable food growers.¹ In this report we will outline the contribution that local food and short supply chains could make to a green and fair recovery and suggest key policies that will improve the establishment of these models.

Local Food, Short Supply Chains, and Decentralised Routes to Market

Local Food focuses on the geographical distribution of food. Short Supply Chains focus on the length of the transaction chain between producer and consumer. Both are elements of a decentralised food system.

Decentralised Routes to Market - may involve local food systems and / or short supply chains. This umbrella term distinguishes both local food and short supply chains from the supermarket supply system, which hinges on corporate ownership and a centralised distribution system.

Local Food Systems - bring benefits by shortening the distance and the time between the harvesting of food and its consumption. Benefits include the high nutritional quality of the fresh food on consumption, reduced fuel costs and CO2 emissions from limited transport and a cut down in waste as the need for refrigeration and packaging are reduced. The way local food is bought and sold preserves the meaning and story of the food, which in turn facilitates a relationship between producer and consumer.

Short Supply Chains - refer to a reduction in the number of players that food is traded between on its way to the customer, with the ultimate short supply chain being direct sales between farmer and consumer. Short supply chains mean that fewer people get a greater percentage of the price paid by the consumer.

2.

Market Failure and Local Resilience

This report shows how redistributing market share of the food system more fairly between supermarkets and decentralised routes to market would address many of the pressing issues highlighted in [part one of the National Food Strategy](#). To show this, we compare the supermarket supply system with decentralised routes to market under the following six headings:

- Economy
- Environment
- Waste
- Food Justice
- Health
- Culture



2.1. ECONOMY

SUPERMARKET SUPPLY SYSTEM

Economic Resilience and Fairness

The alleged efficiencies of the supermarket supply system's economies of scale do not translate into greater choice or lower input costs for producers.¹⁶ 'Cheap' supermarket food prices often fail to include the multiple social and environmental externalities of industrial food production and they do not reflect or support the full cost and value of sustainable forms of production.

The concentration of market share to the largest supermarkets in the UK is a market failure because it reduces competition.¹⁶ This acts as an enormous barrier to entry and growth for many farmers and producers.¹⁷

This concentration of bargaining power exposes farmers to economic risk and limits their autonomy. Farmers are increasingly susceptible to sudden unilateral shifts in sourcing policies and are forced to accept the changes with little warning.¹⁶

Because the supermarket supply system relies heavily on complex global supply chains and imports, its economic viability is vulnerable to external shocks, such as fluctuations in global weather and the cost of oil.¹⁸ The UK food and drink trade deficit is currently £24.3 billion.⁷

Local councils are under increasing pressure to grant planning permission for supermarkets, even when there is evidence of the negative economic impact they will have on local highstreet shops. Councils claim that if they don't grant permission, the supermarkets will always win a court case on appeal, causing councils to bare the brunt of unaffordable legal expenses.¹⁹

Employment

Low pay is a huge issue in food retail, with hundreds of thousands of supermarket employees paid some of the lowest wages in the UK. This in turn is fuelling poverty and undermining social mobility.⁸

A recent study showed that the opening of 93 supermarkets led to the loss of 276 jobs in a 10-mile radius of each supermarket (over four years). This equates to a national loss of over 25,000 jobs.¹⁷

Infrastructure

Small to medium size producers, wholesalers and processors are unable to compete against the enormous economies of scale made possible by supermarket supply systems. This means that local food systems that require a degree of scale and cooperation are constantly hampered by a lack of facilities and infrastructure. For example, small scale arable producers and bakers struggle to access driers, cleaners and dehullers that will economically process small quantities of grain.²⁰

DECENTRALISED ROUTES TO MARKET

Economic Resilience and Fairness

Local food systems tend to distribute the price paid for a food item more fairly along a shorter supply chain. This provides a better farm gate price for the producer and better value for all those involved in the supply chain. This is the experience of most LWA members who sell via local food systems, who wouldn't be able to sell into the supermarket supply system and remain viable.

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Income from organic vegetable box schemes generates almost twice as much value for the local economy as supermarkets do.¹⁷

Smaller, local producers can adapt quickly to unanticipated shocks. This was seen in the spike in sales of vegetable box schemes in the 2 weeks following the first Covid 19 lockdown in the spring of 2020, when sales rose from 68,000 to 144,000.¹⁵

Local food businesses have different 'routes to market', including farmers' markets, box schemes, supplying restaurants and public procurement.¹⁷ This spreads the risk in the event of one of their markets failing.

A recent report from the New Economics Foundation revealed that every £10 spent in a local food outlet is worth approximately £25 to the local economy, whereas every £10 spent in a supermarket only leads to £2.40 being spent in the local area.²¹

There are wider economic benefits of direct sales and local food systems: in their 2012 report From Field to Fork, the Campaign to Protect Rural England (CPRE) found that local food enterprises were cornerstones for a variety of other local businesses.²² This evidence is indicative of the huge potential for local food systems to help rebuild rural economies and create resilient communities, both of which are essential in a post-pandemic world.

Employment

The CPRE's report showed that the local food economy in England supported 61,000 jobs and that money spent in independent local food outlets supported three times the number of jobs than in national supermarkets, with a job created for every £46k turned over.²² Local food producers in Scotland employ an average of 3.4 full-time workers from the local economy compared to the regional average of 2.3 workers per farm.¹⁷



Facts & Figures

The annual local food economy in England is worth a total of £2.7 billion in sales, serving 16.3 million customers and re-circulating £6.75 billion in local economies.



CASE STUDY: LOCAVORE, GLASGOW



Locavore is a social enterprise working to build sustainable food networks. They have a variety of business strands working in different parts of the food system. Locavore runs three local and organic zero waste shops in Glasgow and has plans to expand to 10 over the next two years. Locavore is a wholesaler of organic produce and groceries to other progressive retailers around the UK. They produce organic vegetables and flowers on 8 acres of organic land in and around Glasgow and deliver 1,800 veg boxes per week. Locavore also has a production kitchen where it prepares food for its cafes and retail outlets.

Locavore employs almost 100 people who earn above the real Living Wage and the company makes a substantial contribution to the local economy: their recent LM3 study found that when £1 is spent in their Glasgow shops it is worth £1.94 to the city compared to £1.10 in a conventional supermarket.

Their overall mission is to offer an alternative to supermarkets to as many people as possible, and build the market for local, organic, zero-waste and agroecological food. They want to do this by scaling quickly, with plans to increase their turnover from £4.25m to £10m in the next two years.

Check out their Bigger Plan [HERE](#).

2.2. ENVIRONMENT

SUPERMARKET SUPPLY SYSTEM

Land Management

Supermarket pressures on farm gate prices force farmers into using practices that are not environmentally sustainable in order to keep costs down.⁸ To meet the demands of the vast consolidated supply chain system, producers are having to rely on monocultures and agricultural pesticides.¹⁰ These methods are causing significant declines in levels of pollinators and contributing to soil degradation, which is leading to the loss of food genetic diversity and the deterioration of natural pest control.¹⁶ This inevitably impacts the resilience of our food system.

Climate Change

The centralised supermarket supply system is heavily dependent on transport and production systems that produce high emissions and encourage intensive food manufacturing methods. This leads to lofty levels of food and packaging waste.⁸ Food waste also produces a lot of methane, contributing to GHGs.²³

The reliance on global supply chains means supermarkets import produce from countries that are water scarce or facing their own environmental issues. Much of this food could be produced domestically.²⁴

DECENTRALISED ROUTES TO MARKET

Land Management

Because farmers receive a greater percentage of the sales price of their produce in local food systems, they can afford to accommodate the higher production costs of environmentally friendly farming systems.¹⁷ This contributes to an increase in agrobiodiversity, natural biodiversity and soil health, which are vitally important to the resilience and adaptability of our food system in the face of climate change and environmental degradation.²⁵

Climate Change

Decentralised routes to market produce far less greenhouse gas emissions because their food processing, packaging and transport needs are minimal.²⁶

A study comparing transport emissions for regionalised and globalised supply chains estimated that regionalised food systems could reduce food transport emissions as well as being an essential component to limiting global warming to below 2 degrees celcius.²⁷ Another study found that a shift to domestic production of vegetables in the UK would reduce GHG emissions by 7% and our water footprint by 1.1%.²⁴

A shift to domestic production of vegetables in the UK would reduce GHG emissions by 7% and our water footprint by 1.1%.

Facts & Figures

Greenhouse gas emissions directly owed to the UK food system represent 20% of total UK consumption emissions. This excludes emissions that come from land use change in other countries that are attributable to UK food consumption.

Primary production (farming) accounts for 56% of supply chain emissions. The energy used in processing, manufacture, transport, retail and food preparation accounts for 37% of all supply chain emissions.



**CASE STUDY: TROED Y RHIW FARM,
LLWYNDAFYDD**



Troed y Rhiw Farm is a mixed farm on the coast of West Wales. The farm's ethos is built on the belief in the necessity of sustainable farming in the 21st century. This means taking a holistic approach to food production, which starts with the microbial worlds in the soil and encompasses everything from habitat protection to the role of the farm within the local community. Troed y Rhiw is rooted in organic principles. They look to long-standing farming practices such as crop rotations, composted animal and green manures, fostering biodiversity in their crops and fields and cultivating a balanced farm ecosystem. The farm supports a vast range of wildlife including pipistrelles, brown long-eared bats, a variety of birds, rabbits,

badgers and foxes.

Troed y Rhiw recently received a grant from Social Farms and Gardens in partnership with Food Sense Wales and the Peas Please initiative to build a compost turner. This will help them expand their production in a sustainable way. In the future, they hope to use innovative practices that align with the changing climate, such as using their polytunnel to grow stone fruit. They've also started working with a bed-former to reduce their reliance on mouldboard ploughing.

Troed y Rhiw has an ever evolving relationship with their land - they work it and care for it and in return, it provides them and their community with beautiful food.



2.3. WASTE

SUPERMARKET SUPPLY SYSTEM

Feedback's 2018 report on How Supermarkets Drive Food Waste on UK Farms, shows the role UK supermarkets have in the overproduction and subsequent waste of food on UK farms.¹¹ The report identified four supermarket practices that are the driving force behind retail food waste: cosmetic specification, failure to market seasonal produce, cancelled or altered orders and the concentration of power among supermarkets.

Feedback also found that supermarket behaviours on imports lead to high levels of food waste and reduced incomes for farmers overseas.⁸

A huge volume of plastic is produced to keep produce fresh and protected in transit. The amount of single-use plastic packaging used by the UK's 10 leading supermarkets increased from 886,000 tonnes in 2017 to 903,000 tonnes in 2018.²⁸



DECENTRALISED ROUTES TO MARKET

In contrast to supermarket supply systems, food distributed locally can be picked to order, requires minimal packaging and is more closely targeted to the customer, which minimises waste.¹⁷

The relationship between the farmer and the consumer in a local food system results in a better understanding of food production issues and often leads to customer tolerance of, and often preference for, variety rather than uniformity, and flavour over cosmetic perfection. Customers of vegetable box schemes and Community Supported Agriculture (CSA) often report wasting less produce: Growing Communities, an organic fruit and veg supply scheme in Hackney reported that 13% of their box scheme customers said that the scheme had influenced their decision to use more reusable packaging.²⁹



Facts & Figures

Farmers surveyed for the Feedback report wasted 10–16% of their produce every year, around 22,000–37,000 tonnes. This could feed 150,000 to 250,000 people five portions of fruit and veg a day for an entire year. Food waste is a significant loss of calories that could be consumed by people.



Causes of Waste in Supermarket Supply Systems

Cosmetic specifications – supermarkets dictate strict cosmetic specifications to farmers, regardless of the nutrition, taste and value of the food.

Failure to market seasonal produce – particular weather conditions can lead to gluts. In 2017, a cauliflower glut resulted in huge amounts of cauliflowers going to waste.

Cancelled or altered orders – a significant cause of waste is the difference between buyers' forecasts and confirmed orders, including last-minute order cancellations. Farmers usually have to absorb this cost.

Concentration of power among supermarkets – the UK food retail market is one of the most concentrated markets in Europe. Almost half of the farmers interviewed for the Feedback report said that this unbalanced market concentration has reduced alternative outlets for surplus produce, like markets and green grocers.



CASE STUDY: FIVEPENNY FARM, DORSET

Fivepenny Farm in West Dorset is a community owned processing centre. It was built in 2012 by a cooperative of 52 small farms and local food businesses with the aim of adding value to primary products from their farms and recycle waste. The centre can be used by any business within a 15 mile radius of the farm.

The facilities include a catering kitchen, a juice pressing and pasture rising room, a dairy and a meat cutting room and a range of equipment for outdoor catering at events. The collective use of these processing rooms enables the recycling of waste in many different ways:

- 1) The cooperative enables farms to sell excess produce to other businesses, reducing waste from their farming activities.
- 2) They enable small food processing businesses to make chutneys, jams, juices or fresh foods from cosmetically challenged produce from other farms.
- 3) They empower farmers to use all the parts of an animal while butchering - like the fat, liver and trotters - to make specialised products like soap and terrines.
- 4) The by-products of processing - like the apple pulp from the juice pressing or the whey from cheesemaking - are used by other farmers in the co-operative as animal feed.
- 5) Some of the businesses collect fruit that would otherwise be wasted. For example, apples are collected from orchards where the owners are too old or too busy to harvest the apples into juice and cider.

The use of these facilities have enabled many farms in the area to not only reduce waste, but also become more profitable whilst maintaining the rich biodiversity of the area, especially the traditional apple orchards of the West Country.



2.4. FOOD JUSTICE

SUPERMARKET SUPPLY SYSTEM

Over the last decade of political austerity, an increasing number of households have struggled to afford food, with food insecurity reaching crisis point when lockdown was declared in March 2020.³⁰

.....
20% of adults in England, Wales and Northern Ireland face food insecurity every year.³⁰

Food Insecurity

The UK ranks in the bottom half of food insecure countries in the EU.¹³ Panic buying at the beginning of the pandemic led to significant supply chain issues, with many supermarkets encountering shortages in basic food items. These shortages account for approximately 40% of food insecurity experiences since the beginning of lockdown in March 2020.

Food Poverty

Food deserts - areas that are poorly served by food shops - make up 17% of urban areas and 26% of rural areas in England and Wales.³¹

Nutritious food in supermarkets is not available to those in poverty.³² In 2017, a study found that half of the Trussell Trust Food Bank's emergency food packages went to homes with a disabled person and three-quarters of the packages went to individuals experiencing ill-health and

correlated financial instability.³³ Black, Asian and minority ethnic (BAME) communities were also found to be more likely to experience food poverty. The pandemic and its ongoing impact on access to healthy food has further highlighted the disproportionate impact of food poverty on certain groups.³⁴

Supermarkets create partnerships with food banks, but this is not tackling the root cause of the issue and can actually contribute to irregular food supplies. There have been reports of shortages of some foods and an excess of others, leading to more waste.¹⁴

As explored in Section 2.2, low wages in food retail are a major issue for hundreds of thousands of people. This in turn is fuelling poverty.⁸

DECENTRALISED ROUTES TO MARKET

Local and short supply chains are increasingly addressing issues of food poverty. A study of adults facing food insecurity showed that a Community Supported Agriculture (CSA) intervention led to a substantial improvement in diet quality. The study also determined that subsidised CSAs could be a valuable intervention for vulnerable people.³⁵

A localised food economy creates a resilient community, one that can produce enough calories in the local area to withstand the systemic disruptions that impact supermarket supply chains and leave certain groups exposed to food poverty.³⁶

Solidarity local food models are deconstructing the idea that organic, local food is a niche and expensive product that is only accessible to those who can afford it.

Across the UK, there are a number of local food schemes that aim to provide people living in food deserts and on low incomes with access to fresh, nutritious food.

Facts & Figures

Growing Communities ran a price comparison from their 2018 Annual Monitoring Report. It revealed that the average January to March 2018 basket of goods was 8% more expensive at Sainsburys and 16% more expensive from Ocado. Their January 2018 figures show that their medium veg bag was 38% cheaper than the same veg from Wholefoods, 17% cheaper than the same veg from Sainsburys and 29% cheaper than the same veg from Ocado.



What is meant by Food Justice?

Food Security

The United Nations' Food and Agriculture Organisation (FAO) defines food security as, "A situation that exists when all people, at all times, have physical, social and economic access to sufficient, safe and nutritious food that meets their dietary needs and food preferences for an active and healthy life". Food security does not address the critical question of how a country wants to feed itself, but simply sets the intention to have enough food for its people.

Right to Food

The right to food is a basic human right, which protects the right of all to live free from hunger, food insecurity and malnutrition. A rights-based approach to food is one in which everyone always has financial and geographical access to adequate, safe, nutritious and culturally appropriate food, with dignity and choice. The right to food approach rejects charity as a solution to food poverty. Instead it places the State as a guarantor of people's right to food.

Food Justice

Food justice sees healthy, nutritious and culturally appropriate food as a human right, and addresses structural barriers to that right, such as household income, race and class.



**CASE STUDY: EDIBLE FUTURES,
BRISTOL**

Edible Futures is an urban CSA Market Garden founded on the principles of food sovereignty and agroecology. Tackling food poverty and working to improve the accessibility of high quality fresh food is central to their ethos.

At the beginning of lockdown in March 2020, Edible Futures started a Solidarity Veg Box scheme. The scheme allowed customers to support the donation of around £250 of fresh veg per week to the Bristol charity Borderlands, who support refugees and asylum seekers. Borderlands distributes the food to around 100 asylum seekers a week, all of whom are experiencing extreme poverty.

Facts & Figures

To meet the government's dietary recommendations, the poorer half of UK households would need to spend 30% of their disposable income on food. The richer half of households would only need to spend 12% of their disposable income to do the same.





**CASE STUDY: GRANVILLE COMMUNITY
KITCHEN, LONDON**

Granville Community Kitchen is a Community Food Hub that aims to address the food desert in South Kilburn and ensure that healthy food is affordable for everyone. By working with farmers, market gardeners and producers in the UK and abroad, they can offer fresh, seasonal and local produce to ensure everyone has access to culturally appropriate food.

Their new Good Food Veg Box scheme aims to reduce the price of organic food to make it accessible to everyone. Their two-tiered payment system encourages those who can afford to pay a little extra to do so, so that those who need to pay less can still access fresh vegetables. This is a model grounded in solidarity, that uses fresh, organic produce grown locally by small scale farmers. The project began nine



months ago and already has 22 members, 7 on the higher solidarity price and 15 on the lower Good Food start price. The project aims to create employment in the local area too: they have already created three part-time jobs at the real London living wage. Granville have also just secured funding to supplement an additional 30 low-income households over several months to help them transition from food aid.



2.5. HEALTH

SUPERMARKET SUPPLY SYSTEM

While supermarkets do sell a range of healthy produce, these foods are often unaffordable for people on a low income. This means that many communities in the UK have diets that are low in fruit and veg and high in nutrient-poor, processed food, which are full of sugar and saturated fatty acids.³⁷ Consumption of these foods has been proven to contribute to cardiovascular mortality and all-cause mortality:³⁸ diets that are low in vegetables are responsible for almost 21,000 premature deaths in the UK every year.³⁹ Poor diet is also a key contributing factor to Covid vulnerability. In May 2020, it was reported that one in three people who died in English hospitals with coronavirus also had diabetes.⁴⁰

The economic model of the industrial supply chain relies on being able to sell huge volumes of processed food, which provide a large margin on cheap raw materials. This means that unhealthy, processed foods are aggressively marketed, and the supermarket system does not prioritise the fresh, affordable and local produce that would support our health.⁸

Food poverty is synonymous with poor health.

The co-existence of unhealthy diets and food insecurity is a logical consequence of the UK's food system, where healthy nutrient-rich foods are three times more expensive than unhealthy ones.⁴¹

Falling farm gate prices are leading to mounting financial pressures for producers. This burden is proven to lead to an increase in levels of depression and suicide among farmers.¹⁰

Facts & Figures

The guidance from Public Health England says that people should eat 7 x 80g portions of fruit and vegetables each day. The current average daily consumption of veg in the UK is 2.5 portions.

DECENTRALISED ROUTES TO MARKET

Evidence suggests that strengthening the connection between farmers and local communities is a powerful way to achieve urgently needed dietary behavioural changes. For example, customers at Growing Communities reported increasing their yearly portions of vegetables by an average of 115 portions, while 26% of customers reported improvements to their general health since joining the scheme.²⁹

As discussed in section 2.2 "Environment", there is a strong correlation between local food systems and organic production, because farmers keep a greater share of the sale price to cover the increased costs of organic production. The health benefits arising from organic production have been proven repeatedly, including reduced levels of heavy metals and pesticide residues, and providing higher levels of antioxidants.⁴² A meta review of 343 studies that explored the compositional differences between organic and conventional crops, found that switching to organic foods would provide additional antioxidants that were equivalent to eating between 1-2 extra portions of fruit and vegetables a day.⁴³ Local produce also tends to be fresher than supermarket fruit and vegetables, as the distance travelled between field and consumer is minimal.

Local food models have been proven to address mental health issues by creating access to green spaces and providing opportunities for social connection between consumers, volunteers and growers.⁴³

These additional benefits associated with the community aspects of local food are essential as the UK faces an epidemic of loneliness, brought to the fore by the Covid 19 pandemic.⁴⁴



Facts & Figures

Researchers from the University of Gloucestershire calculated the social return on investment in local food. They found that for every £1 invested in local food, between £6 and £8 are returned to society in the form of economic and social benefits, including training & skills and health & wellbeing.

The New Economics Foundation found that for every £1 spent through the Food for Life Served Here (FfLSH) scheme, £3 were returned in social benefits. Another report found that for every £1 spent through FfLSH, £4.41 were returned in environmental, health and education benefits.



**CASE STUDY: GROW, COOK & EAT,
STOCKPORT**



Grow, Cook & Eat is an urban community growing project that supports people to take greater control of their health and wellbeing. They do this by combining access to local organic veg with cooking, socialising and food growing. The project began as a partnership between The Kindling Trust and Alvanley Family GP Practice in 2017, when the NHS began their rollout of Social Prescribing. They now take referrals to the programme from a range of services who support people with their health, wellbeing and independence. Grow, Cook & Eat participants attend the project's community food hub for 10 weeks, taking part in a morning gardening session,

a cookery class and a shared meal. The cookery sessions focus on making tasty, 'veg heavy' meals on a budget; each week participants take home a bag of organic veg along with recipes, herbs and spices.

This 10 week programme is central to the Grow, Cook & Eat model, which they know encourages and supports people to begin cooking with veg at home. Their ongoing evaluation of the project shows that almost all their participants get into the habit of cooking with and eating more fresh veg by the end of the programme as well as experiencing an increase in social interaction, confidence, physical activity and overall wellbeing.



2.6. CULTURE

SUPERMARKET SUPPLY SYSTEM

Loss of Food Culture

The supermarket supply system distances consumers from the food they eat.

The greater the distance between farm and fork, the less connected the consumer is to their food and where it comes from. This serves to remove the cultural importance of food and leads to a loss of appreciation for it.⁴⁵

This disconnection leads to a loss in consumer knowledge about what they're eating, which diminishes their autonomy and undermines the consumer's ability to make informed choices about an essential part of their lives.⁴⁵

Despite offering a vast array of produce from around the world, there are limits to the range of each produce category supermarkets are willing to stock. For example, most supermarkets only offer five to ten varieties of apple out of the hundreds of varieties available. Behind the guise of choice, customers' options are limited to the varieties supermarkets choose to stock. This inevitably leads to a loss of, and weakened appreciation for, food provenance.



DECENTRALISED ROUTES TO MARKET

Growing Food Culture

Local food re-establishes the connection between consumers, their food and where it comes from, encouraging local distinctiveness, seasonality and diversity. Direct sales provide customers with access to a greater diversity of produce, because farmers can produce heritage varieties of vegetables, fruits, grains, rare breed meat and traditional cheeses without the limitations of supermarket specifications. As explored in Section 2.2, such regional genetic diversity in food production means agriculture and horticulture are more resilient to changes in climate, pests and diseases.

Sustainably produced food, sold locally or regionally to people with a connection to the farm, is a pathway to bringing agriculture away from its reliance on subsidies and back to being a profession that is valued by all in society.

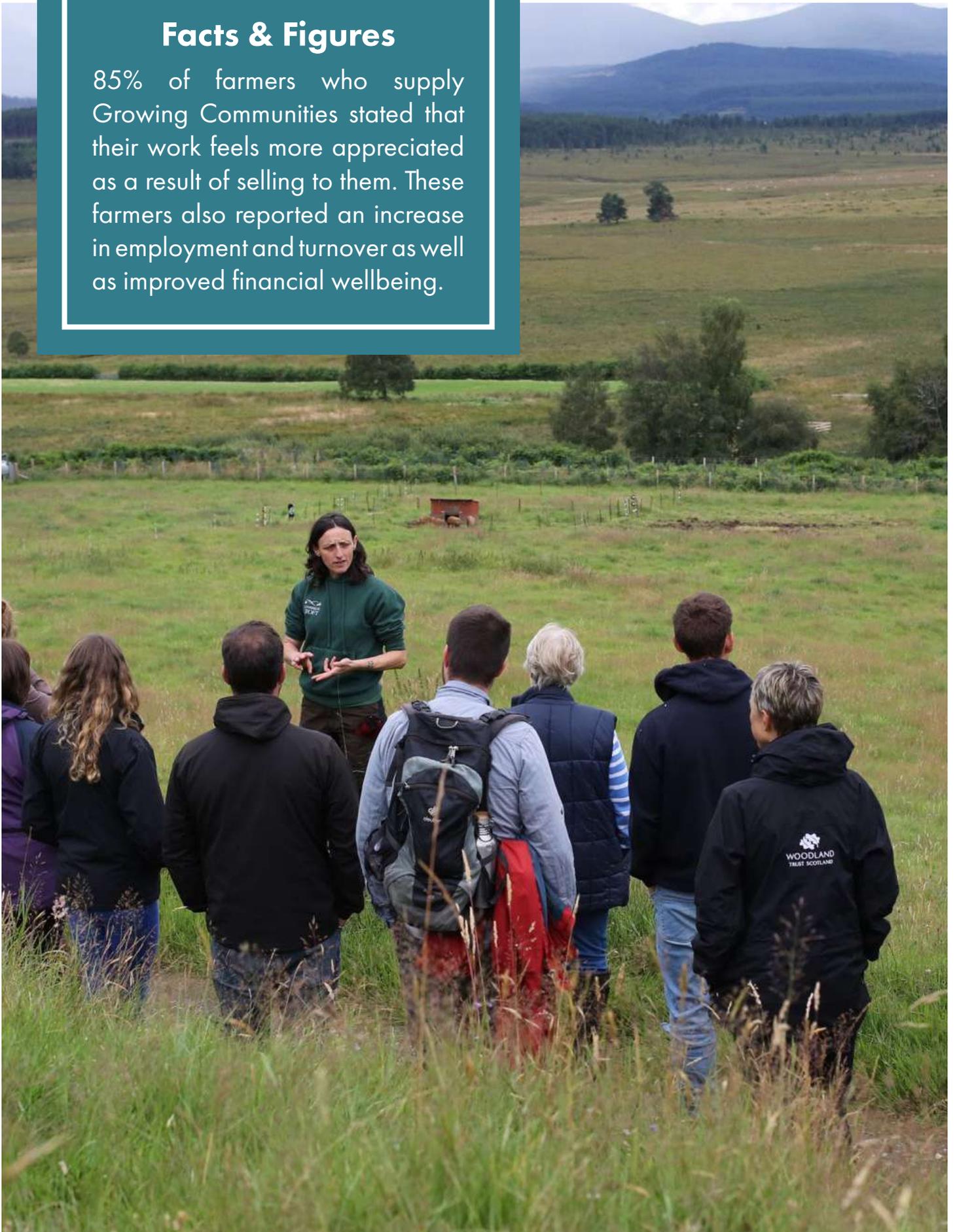
Understanding food cultures and the local provenance of food strengthens the cultural identity of a place and its



people because food begins to hold a value beyond its financial worth.⁴⁵ In a survey in 2014, Scottish growers identified an improvement in public understanding of food as one of the main wider benefits of their local food business. A study of small farms selling via local markets highlighted how workers valued the diversity and meaning of their occupation.²⁶ This enjoyment and engagement in work, which results in a product valued by the local community, is a key factor driving the growing interest in land-based livelihoods today. After decades of decline, during which the average age of farmers has reached 60, it is essential that new entrants are attracted back into the sector and enabled to thrive.

Facts & Figures

85% of farmers who supply Growing Communities stated that their work feels more appreciated as a result of selling to them. These farmers also reported an increase in employment and turnover as well as improved financial wellbeing.





**CASE STUDY: CANALSIDE COMMUNITY
FOOD, LEAMINGTON SPA**

Canalside Community Food was established in 2006, growing food on 10 acres of land for approximately 160 households in and around Leamington Spa, Warwickshire.

One of Canalside's guiding principles is to connect local people with where their food comes from, the land on which it grows and the people who grow it. To that end, Canalside is building a thriving community and strengthening local food culture.

Produce members receive a weekly seasonal share of the harvest, all of which is grown on the farm. Since

Canalside's very first growing season, local people have volunteered to support the paid growers in the work on the farm. Scheme members can now join the growers in the fields twice a week throughout the year, assisting with site maintenance, seed sowing, planting and hand weeding, clearing beds and replanting polytunnels and much more. Produce-receiving members are encouraged to participate in 3-4 work mornings a year as part of their membership; many of them do much more. Canalside's social members (those who don't receive any produce) can also work on the land, learning new skills and making connections with other members.



3.

Public Procurement

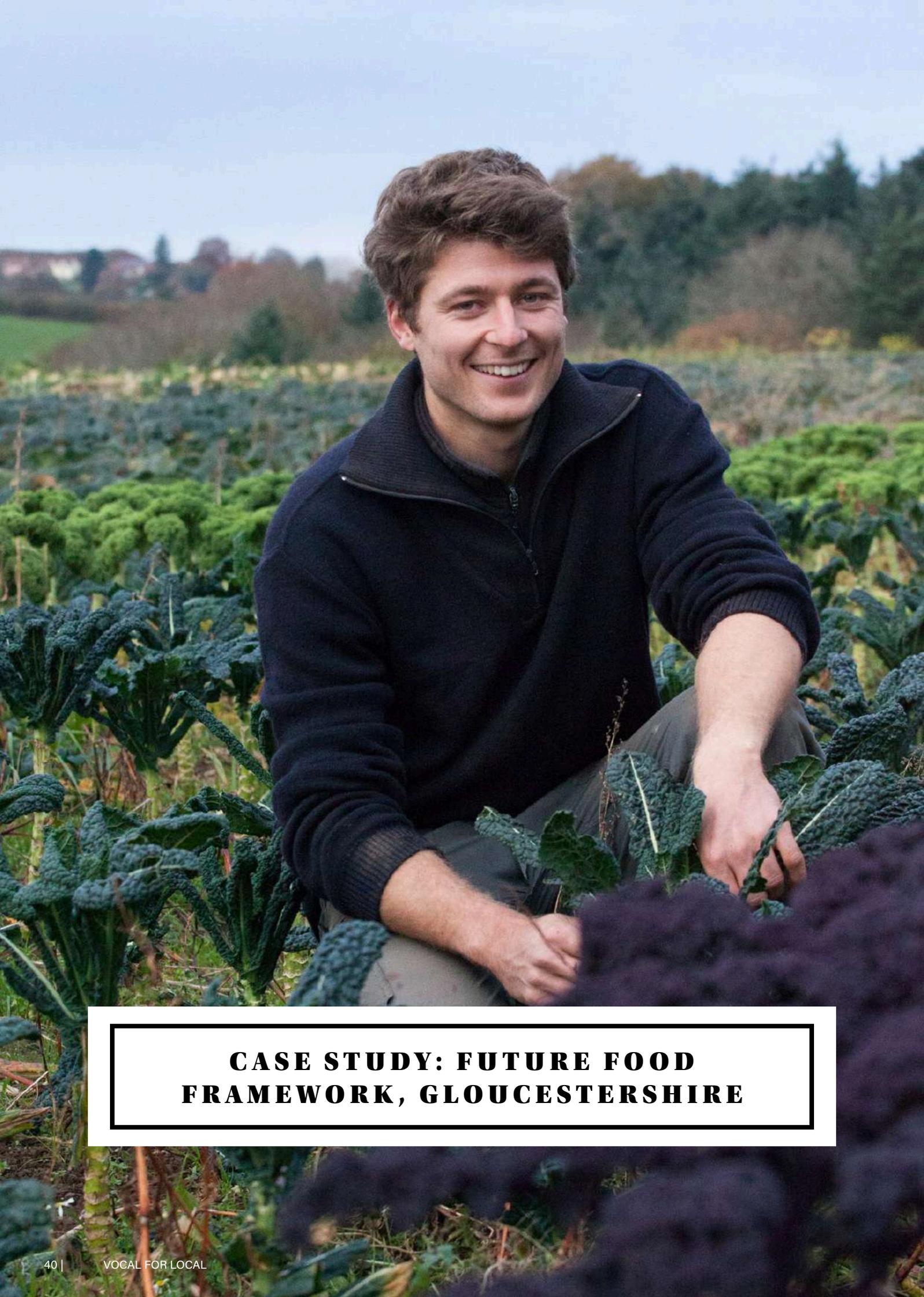
Although the issues raised in section 2 are explored in the context of the retail market, they are just as relevant to the public procurement market. The PSC 100 - a group of caterers, dietitians, politicians, suppliers and healthy eating campaigners operating in the public sector - is dominated by large food service companies that share many of the characteristics of supermarket supply chains. They therefore face many of the same problems.

National and local governments procure around £2 bn of food every year, the majority of which is eaten in schools, hospitals, care homes and the wider social care sector.¹ As the ultimate purchasers, local and national governments are in a strong position to expand the procurement of sustainable and regional food and facilitate the delivery of all the benefits discussed in section 2. Using Dynamic Purchasing Systems (DPS) to procure food is a major opportunity to achieve this aim.

Current procurement practice usually awards a contract for very large volumes of a wide range of products to a single contractor or consortium for a specified period of time (often 3 or 4 years). This approach favours large catering companies and makes it very difficult for small scale producers to become involved. Dynamic Food Procurement takes a more flexible approach, allowing a range of suppliers -including small scale farmers- to access these contracts.

DPS systems also have 'technology and logistics providers' that act as hubs, linking the procuring authority, the suppliers and the end users. This role could be played by local or regional wholesalers, processors or food hubs, which in turn could boost rural economies and create jobs. Access to public procurement markets for local or regional producers has the potential to provide a secure market for major investment in local food infrastructure.





**CASE STUDY: FUTURE FOOD
FRAMEWORK, GLOUCESTERSHIRE**

The Gloucestershire Food Strategy Group (GFSG) was established in 2017 with the goal of creating a circular, local food economy that generates prosperity for farmers, builds natural capital and ensures healthy food is accessible to everyone.

One of the strategic aims within the GFSG is to 'transform demand' for local produce. Increasing local public procurement of food is one of the important levers to do this. Via the hard work of GFS partners, Gloucestershire was included within the South West trial area for the Future Food Framework (FFF). The FFF is a new approach to public sector food procurement, developed by the South West Food Hub in partnership with the government's Crown Commercial Service. The FFF will help small and medium sized regional producers to sell directly to public sector institutions. The FFF is to be delivered via an online platform (DPS) and aims to give public sector buyers a chance to source local, fresh food from a variety of producers, whilst simultaneously diverting public sector food spending into the regional economy. The FFF will create an opportunity to refocus food procurement on quality, welfare standards, seasonality and sustainability.

With the financial support of the National Innovation Centre for Rural Enterprise, GFS partners (including the University of Gloucestershire, Farming and Wildlife Advisory Group South West, National

Farmers Union, BoomCircle Ltd and the Countryside & Community Research Institute) have been working together to ready the region for the FFF pilot. This on-the-ground work includes: investigating the public procurement opportunity (market size), investigating the supply base within Gloucestershire and introducing the concept of dynamic procurement to the local council, growers and farmers.

The work so far has shown there is a strong appetite from *both sides* to buy and sell food more locally in Gloucestershire. However, a lack of processing facilities, weak local distribution networks and uncertainty around price security in local markets remain solid barriers to making this happen.

The FFF requires significant investment in local areas to ready the market and supply base. Without the FFF, it is very unlikely local councils will take the risk in exposing their food supply chains to unproven SMEs suppliers - it is critical that the pilot of the FFF in the South West succeeds because its performance will determine national roll out of the framework, which will ensure investment in the infrastructure that public food procurement entities need to buy more locally.

In order for this to happen, there needs to be a significant shift in government level policy and funding. For more information on how this would work, take a look at the policy proposals at the bottom of this report.

4.

Conclusion

To date, supermarkets and their industrial production and distribution system have undoubtedly been successful at delivering convenience, choice and affordable food for many. However, availability, variety and cosmetic perfection come at a cost. As we have shown in this report, all the issues we face are linked to the industrialised food system on which many of us have come to depend. The Covid pandemic has highlighted the cracks in our system. If we are to tackle the problems of food poverty, dietary ill health and environmental decline, it is essential that we address the market failures inherent in the supermarket supply system by giving a greater role to local food models.

This report demonstrates the connectedness of the problems that permeate our food system, and points to the necessity of a holistic approach to solve them. The supermarket supply system has a powerful role in driving commercial transactions and consumer choice, but this is not leading to the efficient distribution of tangible (food) and intangible (health of people and nature) goods to all of society.⁴⁶ It is the role of the government to tackle this market failure, and ensure that everyone in the UK enjoys the right to good food, that the environment is protected and primary producers are able to stay in business.

This report shows that decentralised supply systems have the potential to play a far greater role in providing healthy, sustainably produced food, but they are currently constrained by the overriding power of supermarket competition and its unrealistically low prices. At the same time, it is essential that food remains affordable and accessible to everyone, and that the current inequalities in access to healthy food are addressed.

Overleaf, we have set out five policy recommendations to boost the capacity of local food systems in order to address the market failures explored in this report. It will take the combined efforts of the government working closely with civil society and the private sector (including supermarkets and small, independent traders) to tackle these issues. The supermarket supply system is likely to have a significant role for many years to come, but the time has arrived to give local food systems a greater share of the market.



Policy Recommendations

1 NATIONAL TARGETS FOR LOCAL FOOD PRODUCTION AND DISTRIBUTION

These targets would feed into local food strategies and be implemented on a regional level. This should follow a food supply vision of 80% domestic and 20% imports, with a target for independent food businesses (including social enterprises and cooperatives) to have a 25% market share by 2030.

2 A LOCAL FOOD INFRASTRUCTURE FUND

A national programme that provides government-level financial support for local food infrastructure and facilitates access to safe and nutritious food for at-risk populations. This would be modeled on the Canadian Local Food Infrastructure Fund.⁴⁷ This scheme would correct the market failure where local foods have become niche, high-end products, by enabling cooperatives, community food projects, networks and grassroots activities that create social inclusion and provide food insecure populations with access to healthy, culturally appropriate food. The fund would help to stimulate a thriving local food business economy, by investing in cooperatively managed infrastructures such as:

- Regional processing facilities (which add value and reduce food waste)
- Local marketing outlets: open air markets, community shops and online distribution networks
- Community Supported Agriculture on county farms and community-owned farms

The infrastructure should include facilities suitable for both regional distribution and processing and very local, direct supply chain sales. The funding should be distributed by Local Economic Partnerships (LEP's) to support regional level, local food strategies which link to national targets for domestic production. The fund should be accompanied by tax incentives for local food retailers. Non-financial advisory support should be provided to community groups to facilitate the development of CSA and to farmers to form processing and marketing cooperatives.



3 PUBLIC PROCUREMENT

Re-orientating school feeding programmes and institutional food services to provide food that is healthy, seasonal, sustainably produced and locally and regionally sourced, using dynamic procurement methods to give smaller suppliers access to public procurement contracts.

4 PLANNING POLICY AND LOCAL BUSINESS RATES

- Applied to limit the spread of supermarkets and support healthy competition between independent food retailers. Central Government, through HM Planning Inspectorate, should support Local Authorities in refusing planning permission to supermarkets in cases where the local food economy will be undermined by unfair competition.
- Used to encourage the production of food in Green Belt areas in order to supply local populations
- Used to address food deserts by creating conducive environments for social enterprise and independent food businesses including the construction of short supply chain infrastructure

5 COMPETITION LAWS

In line with the Environment, Food and Rural Affairs Committee recommendations outlined in their 'Covid-19 and the issues of security in food supply' report, released on 7th April 2021:

- We support the government's assurances that the relaxation of Competition Laws for retailers will not be extended.
- We also recommend that the Government and the Competition and Markets Authority should review whether the relaxation of these laws had a negative impact on consumers, suppliers to large retailers and small, independent retailers during the pandemic.
- The Government should actively seek to reverse the loss of market share by small retailers and the hospitality sector due to the pandemic, and improve market access for locally produced foods through the policies suggested here.



Policy recommendations for individuals



CONTACT MPS:

- Contact your MP and tell them to support local food in your area.

CONSIDER WHERE YOUR FOOD COMES FROM:

- Is your food seasonal and UK based?

SUPPORT LOCAL GROWERS AND PRODUCERS:

- Attend farmers markets or use local, independent retailers.
- Are there any local veg box schemes or CSAs you could join or volunteer for?
- Try and support your community coming together to start a CSA in your local area.

SPREAD THE WORD:

- Share this report with your family and friends and have open discussions about the food you eat.

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Glossary

AGROECOLOGY

Agroecology is the use of principles in farming practices that ensure a balance between plants, animals, people and their environment. Agroecological farming practices aim to work with wildlife, mitigate climate change and give power to local growers and communities to create systems best suited to their needs.

SOCIAL AND ENVIRONMENTAL EXTERNALITIES

An externality is a benefit or cost created by a producer that is not reflected in the market price of their goods. This means that producers do not profit financially from these benefits or costs. An externality can be positive or negative and can come from either the production or consumption of a good or service. The costs and benefits can be private or social: private to an individual or an organisation or social, affecting society as a whole.

UNILATERAL

A unilateral decision or action is taken by only one of the parties involved in a certain situation without the agreement of the other parties involved.

TRADE DEFICIT

A trade deficit is when the cost of a country's imports is greater than the value of its exports.

INFRASTRUCTURE

In this report, infrastructure refers to physical resources such as drying mills, juicing facilities, abattoirs, distribution centres and food hubs.

PUBLIC PROCUREMENT

Public procurement refers to the government's purchase of goods and services for public use. As public procurement accounts for a significant proportion of the taxpayers' money, the government is expected to deliver high quality services that safeguard the public interest.

AGROBIODIVERSITY

Agrobiodiversity is the variety of animals, plants and microorganisms that are used directly or indirectly to support genetic diversity in food and farming systems, including crops, livestock, forestry and fisheries. It also includes non-harvested species that support production, such as soil microorganisms and pollinators.

COMMUNITY SUPPORTED AGRICULTURE

Community Supported Agriculture (CSA) is a partnership between the farmers and the consumers in a community where the risks, responsibilities and rewards of farming are shared between them.

AUSTERITY

In this context, the term austerity refers to economic policies that the government implements to regulate public sector debt. This is usually done through spending cuts, tax increases, or both. These policies and the government's reduction in public spending often lead to a difficult economic situation and a reduction in living standards as a result.

SOCIAL PRESCRIBING

Social prescribing is a referral process that enables

Glossary

health care professionals to refer people to a range of local, non-clinical services, often provided by the voluntary and community sector. Because people's health and wellbeing are determined by a range of factors, social prescribing aims to address people's needs in a holistic way and support individuals to have more control over their health.

FOOD PROVENANCE

Food provenance is an understanding of where food comes from and how it was produced and transported.

DYNAMIC PURCHASING SYSTEMS

A Dynamic Purchasing System (DPS) is an electronic tool that is used to buy goods, works and services. Because it is 100% electronic, a DPS can add new suppliers to its system at any time. This means a DPS can create a shortlist of suppliers, which buyers can choose from at any time.

CROWN COMMERCIAL SERVICE

The Crown Commercial Service CCS is a government run public procurement organisation. The CCS joins policy, advice and direct buying in order to provide commercial services to the public sector.

SMES

SMEs are Small and Medium sized Enterprises, which are businesses with fewer than 250 people.

PERMITTED DEVELOPMENT RIGHTS

Permitted Development Rights are granted by the government, not by local authorities. They allow specific building works and changes of use to be carried out without having to apply for planning permission. Permitted Development Rights are subject to conditions that protect local amenities and control the impacts of any changes.

HM PLANNING INSPECTORATE

The Planning Inspectorate deals with all planning-related work in England and Wales. This includes local plans, national infrastructure planning applications and planning appeals.

LOCAL ECONOMIC PARTNERSHIPS

A Local Enterprise Partnership (LEP) is a locally-owned alliance between local businesses and authorities. A LEP plays a central part in deciding local economic priorities and doing work that drives economic growth and creates local jobs.

COMPETITION LAWS

Under the Competition Act 1998, Competition Laws aim to promote healthy competition across UK markets. Competition Laws prohibit agreements between firms that fix prices or carve up markets. Mergers between businesses can also be stopped if they can reduce competition. In March 2020, the UK Government temporarily relaxed certain competition laws to allow food retailers to coordinate their responses to supply issues during COVID 19.



The Landworkers' Alliance (LWA) is a grassroots union of small-scale, ecological and family farmers across the UK. We campaign for the rights of producers and lobby the UK government for policies that support the infrastructure and economic climate central to our livelihoods.