



Beyond the farmgate

Unlocking the path to farmer-focused supply chains and climate-friendly, agroecological food systems



sustain

Unpicking food prices

Where does your food pound go, and why do farmers get so little?



A tale of two counties

Strengthening local food cultures through mapping supply chains in East Sussex and Lancashire



THE ASHDEN TRUST

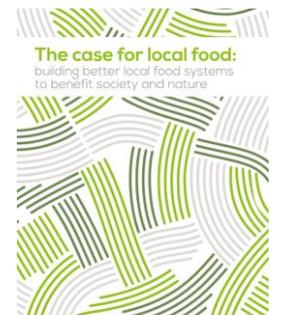


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Sustain Alliance and Sustain' farm programme



Sustain alliance members

Action on Salt / Action on Sugar
Alexandra Rose Charity
Aquaculture Stewardship Council
Association of Public Analysts
Baby Milk Action
Behaviour Change
Beyond GM
Bio-Dynamic Agricultural College
Bio-Dynamic Agriculture Association
British Association for the Study of Community Dentistry
British Dietetic Association
Campaign to Protect Rural England (CPRE)
Caroline Walker Trust
Centre for Agroecology, Water and Resilience (CAWR)
Centre for Food Policy
Centre on Population Approaches for Non-Communicable Disease Prevention
Chartered Institute of Environmental Health
City to Sea CIC
Commonwork Trust
Community Supported Agriculture (CSA) Network
Compassion in World Farming
Diabetes UK*
Dung Beetles for Farmers*
E.coli 0157
Eating Better
Faculty of Public Health
Fairtrade Foundation
Family Farmers' Association
FareShare
Farming and Wildlife Advisory Group SW*
Farms not Factories
Feedback
First Steps Nutrition Trust
Food Foundation
Food Matters
Food Systems and Policy Group, University of Hertfordshire

FoodCycle
Forum for the Future
Friends of the Earth
Gaia Foundation
Garden Organic
Global Justice Now
GM Freeze
Growing Communities (and Better Food Traders)
Health Education Trust
Hubbub
Hyperactive Children's Support Group
Independent Food Aid Network (IFAN)
International Institute for Environment and Development (IIED)
Keep Britain Tidy
Magic Breakfast
Marine Conservation Society
National Federation of Women's Institutes
National Trust
Nature Friendly Farming Network*
Open Food Network UK
Oral Health Foundation
Organic Farmers & Growers
Organic Research Centre - Elm Farm
Organic Trade Board
Pasture-fed Livestock Association
People Need Nature
Permaculture Association
Pesticide Action Network UK
Plantlife
Rare Breeds Survival Trust
Royal Academy of Culinary Arts, Chefs
Adopt a School Trust
Royal Society for the Prevention of Cruelty to Animals (RSPCA) (covers RSPCA Assured)
Royal Society for the Protection of Birds (RSPB)
School Food Matters
School of Artisan Food
Shared Assets
Slow Food in the UK
Social Farms and Gardens

Soil Association
Students Organising for Sustainability (SOS-UK)
Sustainable Food Trust
Sustainable Soils Alliance
The Country Trust
The Kindling Trust
The Landworkers' Alliance
The Orchard Project
The Real Farming Trust
Think Through Nutrition
This Is Rubbish
Transform Trade
Unchecked
Unison – the public service union
Unite the union – rural and agricultural sector
Vegetarian Society
Women's Environmental Network
World Cancer Research Fund
Worldwide Opportunities on Organic Farms (WWOOF)

Sustain alliance observers

Agricultural Christian Fellowship
Allergy Alliance
Child Poverty Action Group
Community Food and Health (Scotland)
Food Ethics Council
GMB (Britain's General Union)
Green Alliance
Linking Environment And Farming (LEAF)
Marine Stewardship Council (MSC)
Nourish Scotland
Obesity Health Alliance*
Royal Society for Public Health (RSPH)
Which?
Wildlife and Countryside Link
WWF - Scotland
WWF - UK

What we do

Working in collaboration, we:

- Develop networks of people and organisations to devise and implement projects and campaigns, and to provide a platform for recognition and replication of pioneering work.
- Run highly effective and creative campaigns, advocacy, networks and demonstration projects, aiming to catalyse permanent changes in policy and practice, and to help equip more people and communities with skills as change-makers.
- Advise and negotiate with governments, local authorities, regulatory agencies, funding bodies and other decision-makers to ensure that legislation and policies on food, fishing and agriculture are publicly accountable and socially and environmentally responsible.



Key Issues for Sustain

Affordability for all and fair wages for all food workers

Nutrition and diet related disease

Climate mitigation and adaptation in land use and diets (incl public procurement)

Wildlife and natural capital loss and harm (land, soil, water, nature assets, pollinators, geneticagrodiversityetc) in UK and in global chains

Farm support and supply chain regulation and investment

Local partnerships via Sustainable Food Places Network – 80 partnerships across UK

Key farmer/grower issues

Huge demands on farmers (climate, nature, low prices, nutrition, costs increasing). Farmer survey dissatisfaction. Not enough choice of who to sell to.

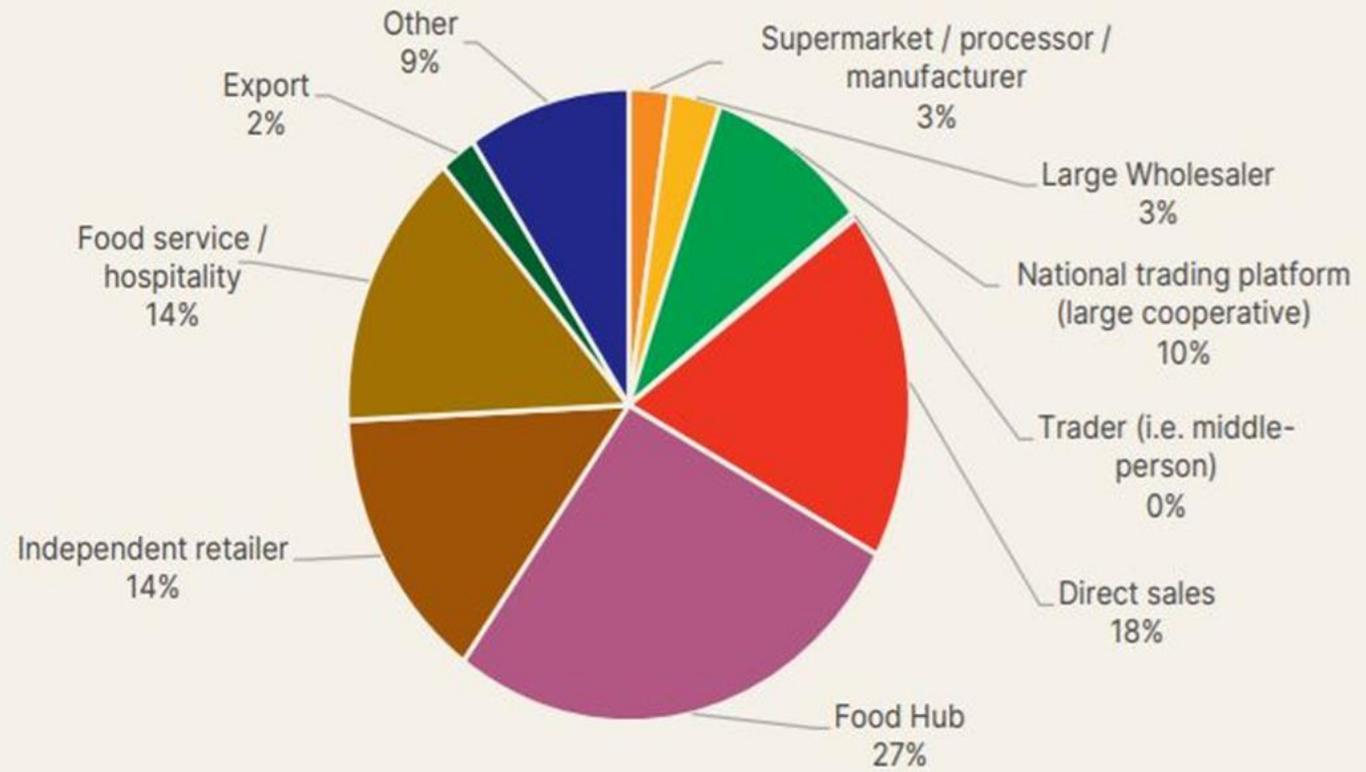
Public policy uncertain and budget inadequate to deliver ££ for transition and public goods

Unfairness in supply chains recognized in GCA 2013 and in AG Act 2020 – but not enough to tackle it

Lack of transparency and unwillingness to look further and political inclination to leave food to market

500 Farmers survey 2021

- 56% of farmers want to supply different markets (beyond supermarkets)
- Further 20% would consider it.
- 51% want to see more food hubs, box schemes or farmers' markets
- 50% want to join/start a cooperative



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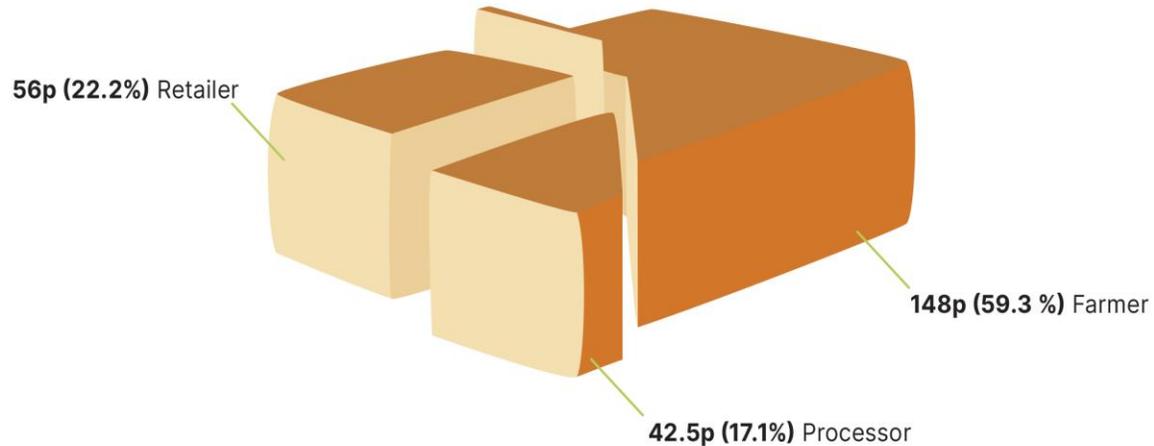


Professor of Accountancy Lisa Jack

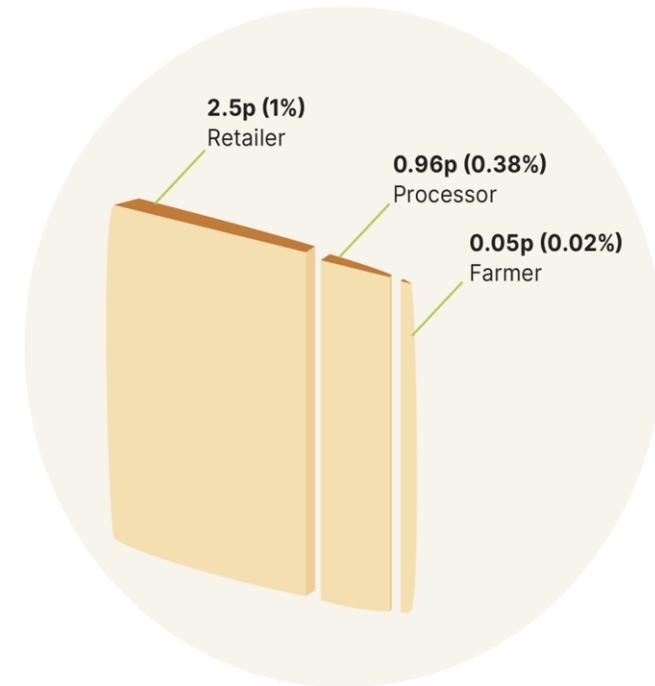
- Examined 5 everyday products
- Detailed examination of money in whole supply chain
- Costs and profits for players
- Illustrating key issues with data
- Recommendations

The data suggests serious issues in whole supply chain

Overhead costs & profit
(250p / 100%)



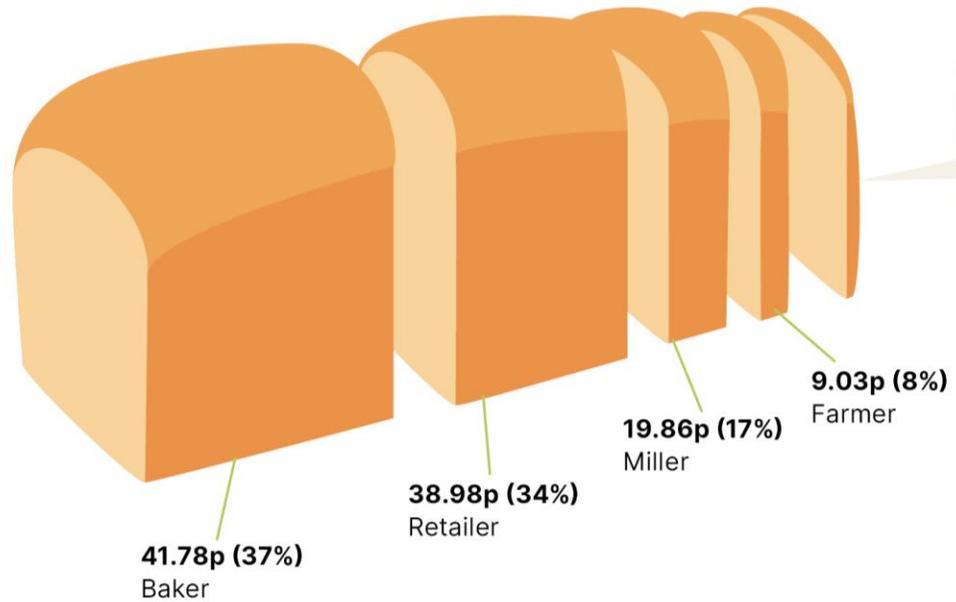
Profit
(3.5p / 1.4%)



Sliced Loaf

The percentage of retail price of each stage in the supply chain of an 800g loaf of bread for supermarkets – typical retail price £1.14.

Overhead costs & profit (114p / 100%)



Profit

(4.35p / 4%)



Researchers

- The report's researcher Professor Lisa Jack, University of Portsmouth, notes

“Our food systems have very high production and overhead costs, yet what profits there are, could be shared more fairly along the supply chain, supporting not just affordable food but better incomes for those working in the industry”.

- Additional researcher Harriet Hammans of City, University of London notes that

“Three times more of your food pound goes to farmers with every purchase you make from your local Better Food Trader or not-for-profit food hub. Farmers make more money selling into this transparent, ecological supply chain to invest in their sustainable, organic businesses - which are the future of farming and our countryside. Your money also goes towards paying staff who work so hard in the supply chain more fairly, and supporting an innovative, socially conscious trader which has the potential to scale up in the future.”

Key policies

Better regulation is needed to help redress the imbalance of power - maintaining and strengthening the Groceries Code Adjudicator, introducing new, legally binding, sectoral supply chain codes of practice.

Building new better routes to market for farmers- an action plan to increase the market share of shorter and farmer-focused supply chains, public investment in localised infrastructure (eg sorting, drying, food hubs); networks and dynamic public procurement models to source from a large range of farmers and growers.. Curb local dominance of multiples.

More transparency in supply chains, greater mandatory reporting and acknowledge the huge overheads in the current, complex system. New UK data transparency project needs to be bigger and faster.

Gaps— shareholder dividends, marketing and advertising

What we can provide

- Key reports, data and insight
 - Supply chain, ELMs, R&D, advice and support
 - On-going campaign issues eg uplands, food hubs, planning
- Experts, alliance members, practitioners and lived experience
- Ongoing projects and initiatives (we are partners in several UK research programmes)
- Local community links – see www.sustainablefoodplaces.org
- We have institution members eg City Univ London, Coventry and members of Working Party.
- Limited capacity to be interviewed involved in undergraduate projects.
- Our latest annual report listing impacts and projects is here <https://www.sustainweb.org/assets/sustain-annual-report-2022-Dec22.pdf>

List of resources etc

- Links to the farming work at Sustain <https://www.sustainweb.org/sustainable-farming-campaign/>
- Our agroecology explainer <https://www.sustainweb.org/sustainable-farming-campaign/a-new-way-of-farming/>
- Useful short blogs including on ELMS, horticulture Strategy, supply chain work, agroecology etc <https://www.sustainweb.org/blogs/?section=14>
- For all farming and supply chain reports and data – all free downloads use <https://www.sustainweb.org/sustainable-farming-campaign/publications/> and chose no donation.
- The Farm Working Party members <https://www.sustainweb.org/sustainable-farming-campaign/who-is-working-on-it/>
- The wider Sustain list of projects including on low income consumers, diet, climate and food etc <https://www.sustainweb.org/projectsandcampaigns/>