Growing our Future UK

ROUTES TO MARKET

This infographic shares insights on the **routes to market needed to enable regenerative agriculture to scale** in the UK, based on a collective diagnosis by 20 organisations working across the UK food system.

Forum for the Future convened this group as part of the **Growing our Future UK programme** between January and July 2024. Participants co-created a **vision of the future with thriving markets** for regenerative produce which centre regeneration and justice for people and the environment. The group considered **where we are today and what is preventing progress towards that future vision**. Finally, participants identified seeds of that future which we can see today, and the ambition, action, pilots and advocacy that are driving progress. The infographic highlights **people already working on these ideas and innovations**, how this is taking shape, and where more action or collaboration might be needed. Where can you support this transition? Who would you connect with to support and amplify your work or to **learn more about what others are doing** or trialling? Please contact Duncan Williams to learn more or connect to others in this space.

Thank you to all who participated in this process, shared their wisdom and built a picture of the future together: Adios Advisory, Better Food Traders, Earthworm, European Food and Farming Partnerships, EIT Food, FFCC, Fork Consulting, G's Fresh, Open Food Network, Pasture for Life, Planton Farm, Renison's Farm, Shropshire Good Food Partnership, Soil Association, Susan Arndt, Sustain, Sustainable Food Trust, The Restaurant Group, WSH Baxter Storey and Zero Carbon Forum.

BARRIERS TO PROGRESS

Ownership

Ownership models aren't designed to share value across the food system. A lack of community integration into retail businesses, coupled with a lack of community ownership of food production and processing, shut communities out. Citizens are reduced to consumers, and farmers to producers, only able to influence the system via their purchasing/selling decisions.

More resilient production models

Resilience of food supply has been overlooked in place of profit and just-in-time efficiency. The finance and policy landscape makes it difficult to create new, more resilient production models. To transition there needs to be policy and financial support for stacked businesses, urban farming, and community supported agriculture.

Non-retail procurement

New infrastructure is needed that supports more direct relationships between growers and consumers. This infrastructure would include local and regional food hubs that aggregate and manage the quality of regenerative produce. Digital platforms can also enable this by facilitating hubs trading together, thereby creating points of connection in more distributed markets.

Infrastructure

There is currently a lack of local markets and local processing facilities that would aggregate and manage regenerative produce. Regenerative produce will need access to processors who are processing bulk produce in season, shifting product and processing design to accommodate seasonality. Both physical and digital infrastructure is needed to support more distributed and local production.

Retail procurement

Retail is dominated by consolidated supply chains that reduce the opportunity for new entrants. Retail procurement, distribution and processing infrastructure is not adapted to diversity due to cost saving. Retailers are not required to procure from local sellers and are not invested in designing their systems to benefit local growing solutions.

Innovation for and regulation of protein

Regenerative agriculture systems propose an integrated role for livestock into arable systems, and a decreased stocking density in grassland areas. Livestock production continues to be siloed and intensified within single sector businesses. A lack of funding for dietary change and sustainable protein production limits dietary shift. There is also inequitable access to innovations in alternative proteins.

Regulation

There is an increasing need for verification of environmental impacts within corporate supply chains. This creates an audit burden on farmers and food businesses which would benefit from streamlined on-farm data collection mechanisms and aligned auditing. Certification would be more effective if data collection were streamlined, and there was better linkages between production and natural capital markets.

Certification

There is a contradictory policy environment for the scaling of regenerative farming (e.g., an undermining of environmental farming with current food and procurement objectives) and a lack of landscape level policy thinking. In processing, complex regulations favour large scale operators. Political uncertainty is also an inhibitor to investment and change.

VISIONS OF A REGENERATIVE FUTURE

Ownership

We have embraced cooperative ownership structures that democratise the food system and foster more equitable distribution of resources within it. New supply chain and business models, including the retail model, have been developed and widely adopted. This enables a more equitable sharing of risk and value. New land-tenancy and ownership agreements enable communities and farmers to adopt more regenerative practices and ensure sustainable livelihoods.

Non-retail procurement

Local food hubs are as powerful as supermarkets were in 2024 and are enabling farmers to access local markets for direct selling as well as supplying to veg-box schemes. More subscription models and direct relationships between growers and consumers have begun to change the relationship consumers have to food and farming. Local councils are adopting dynamic procurement and supporting suppliers to access local food sources.

Retail procurement

Retailers have adopted new business models that utilise the efficiencies of their logistics, handling, distribution and processing costs to support distributed, local food production systems. Supermarkets are tapping into the local food networks supported by government mandated higher local procurement requirements.

Certification

The development of better farmer data and auditing solutions are helping farmers to get more regenerative product to market. Data is collected remotely where possible, easing the burden of audit on farmers. Market price now reflects the true cost of food production. This is enabled by streamlined product labelling in supermarkets and food hubs. Natural capital markets and a carbon trading market are also incentivising the shift to regenerative food production.

More resilient production models

People returning to the land are enlivening and building rural communities while cities have new market relationships with growers. New business models and financial incentives are helping farmers to adopt regenerative practices, producing more nutrient-dense food. This creates positive health and environmental outcomes. Investment and innovation on farm is driving climate adaptation and enabling diversification.

Infrastructure

Infrastructure for local markets and local processing facilities could see a shift to infrastructure provided as a service. New infrastructure such as open data solutions, online platforms and trading hubs are facilitating new, fairer, regenerative food markets that can connect smaller growers to retailers, increasing resilience. Regional governance and collaboration among Councils is supporting the development of new infrastructure solutions.

Innovation for and regulation of protein

The shift to regenerative agriculture has promoted enthusiasm for plant-based diets and higher targets for organic protein/meat production. Consumers are more aware of the environmental and social cost of the food they eat. National government has supported this shift through new regulation of protein production that integrates more livestock into arable and better funding for protein innovation and the creation of new national dietary guidelines.

Regulation

Supported by consultations that have head from diverse voices, the national government has created a regulatory framework to support local food systems and ensured that global foods only come in to the UK when it makes sense. There has been a simplification of cross border regulations and new landscape level policies that are incentivising regenerative and local agriculture. Public procurement mandates require more local sourcing.

8 NECESSARY SHIFTS FOR **regenerative agriculture**

New ways to share **value** and risk

Change actors are **learning from innovation in business models** that can enable more equitable distribution of value & risk among stakeholders in the food system.

Alternative models of land ownership are being tested such as **Commoning and stewardship**.

WORKING ON IT:
- Stroud Commons
- Liverpool commoning process. Mutual Credit Services

Farmers are **exploring how value is more equitably** accounted for

WORKING ON IT:
Planton Farm Impeckable Poultry project explores the true value of producing chickens regeneratively

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Elevating the voices of farmers in the transition.

WORKING ON IT:
FFCC are looking to elevate farmer voices in a similar way to the citizens voice elevated in The Food Conversation.

Supporting businesses to explore business models that support more equitable **nature friendly practices**.

WORKING ON IT:
- Better Food Traders work with independent retailers
- The Wildlife Trusts advocacy for a just transition

Unlocking local processing potential

Change actors are **developing new relationships with processors**, enabling them to support the processing of regenerative products and enhance local supply chains.

Working with abattoirs to support shorter, more **local supply chains.**

WORKING ON IT:
Sustainable Food Trust Small abattoirs campaign and secretariat

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Develop relationships with processors to award **sustainable commitments.**

WORKING ON IT:
Soil Association Food for Life Supplier Scheme

Farmers working with small abattoirs that can **enable online selling.**

WORKING ON IT:
Planton Farm

Supporting **local** **food** systems

Change actors are **promoting the benefits of local food** systems and developing tools that support their integration into the existing food system.

Campaigns that promote and support **the value of local food systems** and how to scale them.

WORKING ON IT:
- Sustainable Food Places campaign
- AFN+ Local Food Plan

Campaigns that build **better links between citizens** and their food.

WORKING ON IT:
Food Citizenship campaign

Regional food networks that amplify place-based regional and bioregional food partnerships by convening and connecting people.

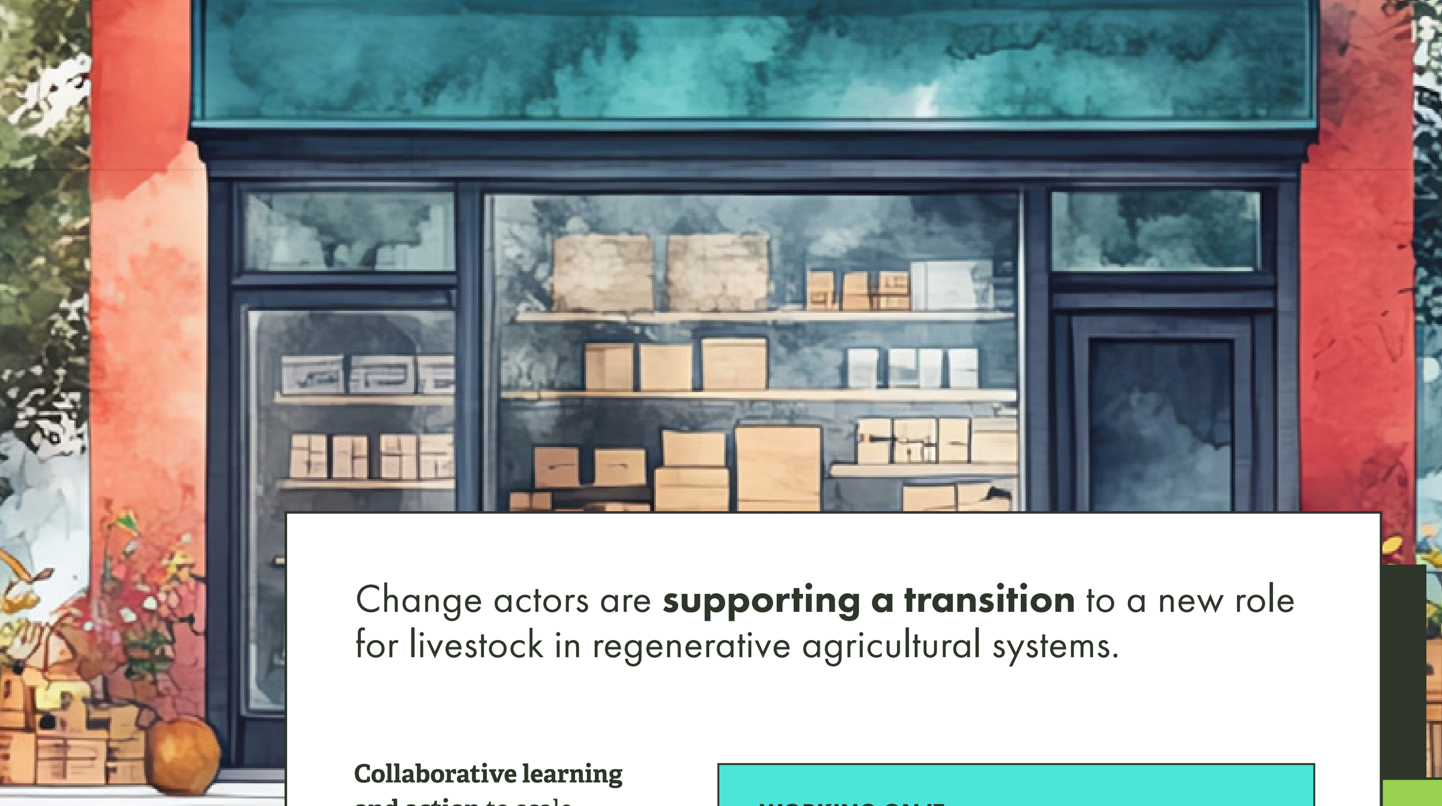
WORKING ON IT:
Shropshire Good Food Partnership

Organisations **sharing learning** and examples of small scale agroecological production.

WORKING ON IT:
Open Food Network Case Studies

Awards and accreditations that integrate local food requirements.

WORKING ON IT:
Soil Association - Food for Life Schools and Early Years awards.



Change actors are **supporting a transition** to a new role for livestock in regenerative agricultural systems.

Collaborative learning and action to scale new thinking on the role of livestock in regenerative systems.

WORKING ON IT:
Zero Carbon Forum run action groups with members to focus on solving issues/challenges within the dairy sector.

Research and advocacy to support the important role of livestock in a regenerative food system.

WORKING ON IT:
- Pasture for Life Low input livestock project
- Sustainable Food Trust soon to be published Rethinking Grazing Livestock report

A **new role** for livestock

New procurement and **sourcing practices**

Change actors are supporting **innovation in procurement models and sourcing practices** which enable more equitable distribution of the risk and cost of transitioning in the supply chain.

Cross sector collaborations are supporting businesses to share learnings and scale solutions.

WORKING ON IT:
Zero Carbon Forum are working with hospitality businesses to share learning about supporting regenerative agriculture

Businesses are supporting the design of **new products** that align with regenerative principles.

WORKING ON IT:
Sustainable Food Trust and Ellen McArthur Foundation. Big Food Redesign Challenge.

Innovation in **open source digital technology** will support new procurement practices.

WORKING ON IT:
Open Food Network

Food manufacturers can **de-risk the transition** by supporting changes to farm practices.

WORKING ON IT:
EFFP are working with food businesses to embed sustainability

Advocacy and frameworks are being developed to incubate new sourcing models that share transition costs across the value chains.

WORKING ON IT:
Financiang framework developed by the Sustainable Markets Initiative Agribusiness Task Force

Food service businesses are **trialling incentives** for regen ag with open book costing.

Producers and retailers are **collaborating to support the transition.**

Telling the story of the transition

Change actors are **developing campaigns** that tell the story of the change that is needed.

Training programmes that help people see the vision of the transition and their role within it.

WORKING ON IT:
Roots to Regeneration Regenerative Agriculture Training Programme

Collaborative, aligned **marketing campaigns** that create a narrative to help bring customers along and understand the transition.

WORKING ON IT:
- Better Food Traders
- FFCC are developing content like that produced for the Food Conversation.

Change actors are **innovating with new infrastructure** that supports more local, more regenerative food systems.

New schemes that enable buyers to access **smaller food producers**.

WORKING ON IT:
Soil Association Food For Life Supplier Scheme

Organisations exploring how to **incubate local food hubs** that connect regen producers with demand.

WORKING ON IT:
- Shropshire Good Food Partnership
- Better Food Traders

Running pilots to redefine retailer specs for varieties to support regen ag

Research and thought leadership on what new food systems of the future could look like:

WORKING ON IT:
- AFN+
- Forum for the Future

Infrastructure that enable local producers to list and sell their produce across **multiple platforms**.

WORKING ON IT:
Open Food Network

Platforms that support **local food hubs and distribution**.

WORKING ON IT:
- Better Food Traders
- Open Food Network UK

Certification that verifies that the food served by **catering businesses** supports local sustainability outcomes.

WORKING ON IT:
Soil Association Food For Life Served Here

Infrastructure for local food systems

Change actors are trialling **new data collection and adopting new tools** that support true cost accounting. This incorporates both the benefits and external costs of producing food.

Thought **leadership and advocacy** on the true cost of food.

WORKING ON IT:
Sustainable Food Trust FAO/GAFF True Cost Accounting Accelerator

Trialling integrating the true cost of food production in research and pilot projects.

WORKING ON IT:
- Shropshire Good Food Partnership and Foodhall Farms
- Planton Farm Impeckable Poultry: Redesigning chicken production

Organisations designed to **measure nutritional value** of food produced

WORKING ON IT:
Growing Real Food For Nutrition CIC

Trialling new tools for **accounting for the externalities** associated with food production

WORKING ON IT:
- A Greener World
- Life-cycle assessments of products and carbon. Using tools such as EU Cool Food Pro carbon calculator

Improving the data for reporting on the environmental and nutritional impact of food.

WORKING ON IT:
- DEFRA Food Data Transparency Partnership
- University of Lincoln NCMF Nutrient Density study

Food producers **trialling data capture on impact** and quantification of external cost through ESG (beyond carbon) supported by digital infrastructure.

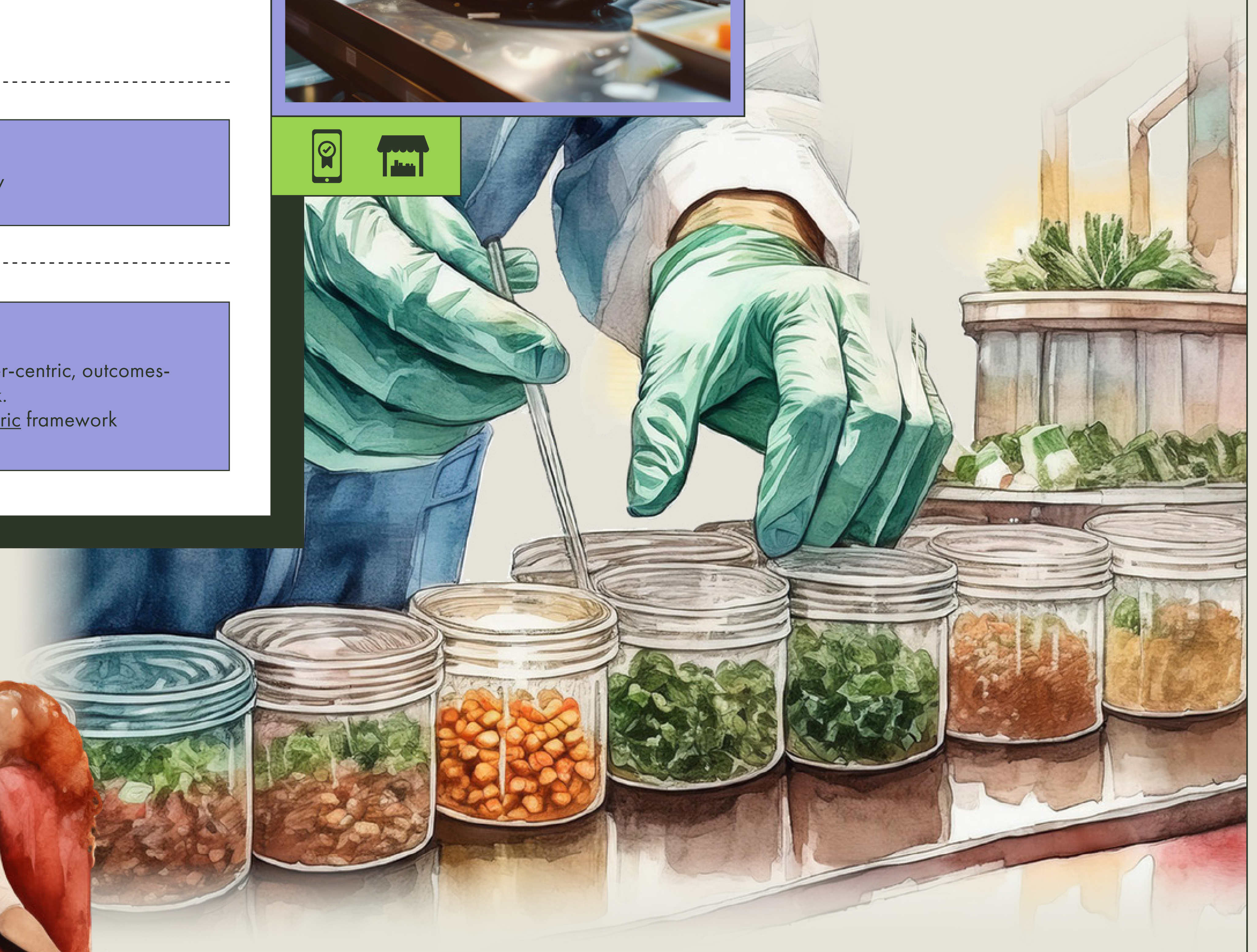
Food companies paying more for **accredited / higher welfare products**.

WORKING ON IT:
WSH Baxter Storey

Development and promotion of **international sustainability frameworks** that support the transition

WORKING ON IT:
- Regen10 a farmer-centric, outcomes-based framework.
- Global Farm Metric framework

Pricing food to reflect its **true cost and value**



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