

# Food and values

A recipe to save British farming

Chris Rose for the Soil Association



**Soil Association**



Published by the Soil Association in partnership with Sheepdrove Organic Farm, Crazy Jack Organic and Green & Black's

# Foreword

There is currently a welcome, and overdue, resurgence of political interest in the environment. David Cameron's first food and farming speaking engagement after becoming Conservative Leader was at the Soil Association's National Conference in January 2006. He recently emphasised the growing importance of 'quality of life' and 'well-being', the 'beauty of our surroundings, the quality of our culture'. David Miliband, the new Secretary of State for the Environment, is proposing a new 'environment contract', to achieve for the environment what the post war 'social contract' did, for example, in the fields of education, health and social welfare.

Policy for British farming is not focussed on improving the quality of the lives of British people. At best it strives to produce anonymous commodity crops as cheaply as possible, with small areas allowed for nature conservation or 'niche' quality foods (the code for organic farming, serving to emphasise its marginal role in the 'real' world of industrial farming). At worst, agricultural policy is simply one of a highly subsidised but relentless decline, with hard-headed policy 'experts' seeing no future for family farms, mixed livestock and cropping farms, local food production, or new local food distribution systems – except for the inevitable and marginal 'niche'.

Good quality, healthy, tasty and enjoyable food is of fundamental importance to the quality of our lives. So is a welcoming and beautiful countryside. Any new, notional environmental contract between the British public and the Government must deliver good quality, environmentally sustainable food, and an unpolluted, unsprayed, energy efficient countryside.

If farming changed in this way, would more people have to go hungry? Recent research has looked at what would happen to global food supplies if half the world's farming went organic.<sup>1</sup> The American and Danish scientists involved used conservative assumptions, including no increase in the area of land farmed. They found that slight decreases in yields in developed countries would be more than matched by increases in production in developing countries. Overall there would be a slight decrease in hunger worldwide.

Organic food and farming is not perfect. Much more needs to be done to make healthy organic food available to all. Good food costs less if it is bought direct from the farmer. Increasing the amount of seasonal and unprocessed food we eat will reduce the cost of our weekly shop. If we follow healthy eating guidelines and reduce the amount of meat in our diets, more expensive, better quality, high welfare organic meat becomes more affordable. We also need to improve the quality, and the environmental, animal welfare and social outcomes, of organic production. But, as this report argues, it is the best option we have, or could have, for delivering the objectives that David Cameron and David Miliband have identified. And, again as this report suggests, it nurtures food, ways of farming and a countryside in line with modern values.



Peter Melchett  
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# Executive summary

People's values are changing. Britain has had something of a food revolution. An increasing majority of people are seeking experience and life quality rather than more material possessions.<sup>2</sup> Countryside recreation is on the up, and people are increasingly moving to rural areas. Sales of junk food are on the decline while those of fresh fruit, vegetables and organic food are rapidly rising. Schools are changing menus for more local, seasonal and fresh produce.

Yet the Government seems unaware of the significance of these trends, and their potential to transform the deeply unpopular twentieth century legacy of industrial intensive agriculture into something in tune with modern values. In short, the Government's blinkers seem to be blinding it to a real opportunity to save British farming.

Government policy on nutrition has begun to respond in line with changing consumer values but core agriculture policy remains set on its old course. The Government's sharpest vision for farming<sup>3</sup> is a narrow commitment to cut the financial costs of the Common Agricultural Policy. Otherwise it still assumes the future for most farmland lies in intensification, more machines, fewer people working on farms, more agro-chemicals, more use of energy, more monocultures producing feedstock for processing.

The central agricultural activity – the production of food – is being largely left out of the equation. The food revolution, far from being harnessed to lever a quality revolution in mainstream farming, is passing it by. Agricultural policy is diverging ever further from public values, which increasingly embrace production ethics, psychological and physical health, a sense of local community and authenticity and action on global concerns such as climate change.

What we need is a far more holistic farm policy vision, putting quality before quantity. In this report we identify a seven-ingredient recipe to help resolve many of the social, environmental and economic problems afflicting our farming, food and countryside. Without such changes, farming may progressively disappear from the British countryside.

The seven key ingredients are

- aiming as a matter of policy to bring farming into line with public values and farm to provide
- local
- seasonal
- fresh and natural food

with farming systems that are

- ecologically and environmentally integrated
- resilient
- humane

This requires a vision which connects international obligations to protect climate with responsibilities for landscape conservation, the provision of health and recreation services, the facilitation of local community enterprises and opportunities, nutrition and dietary policy, the strategic security of our food production and delivery systems, the ethical basis of food production, well-being, happiness and experience. Such a vision cannot even be glimpsed if farming is viewed simply through a set of accounts. As the Henley Centre has pointed out, most British people have moved beyond 'more stuff' to seeking better experiences. It is time that the official vision for farming did so too.

Britain's intensive industrial form of agriculture is a legacy of the twentieth century. It is an out-dated design, organised to channel uniform cheap material into the food processing industry and

supermarkets. It stretches the seasons with heavy doses of pesticides and artificial fertiliser. These consume so much climate-polluting energy that such farming will become increasingly uneconomic.

Total income for agriculture in the UK has dropped dramatically, and payments to farmers from public funds make almost all the return in UK farming. In other words, as well as being environmentally unsustainable, almost all farming in Britain is uneconomic in conventional market terms.<sup>4</sup>

If farming is failing economically and out of line with public values, one might ask why the present policies are continued? Part of the answer is simply inertia. Agribusiness is still conventional wisdom in most of Whitehall, strongly promoted by the big food processors and retailers. Industrial farming is like a supertanker: it has entered new social waters but is still propelled forwards with the momentum of its twentieth century past.

Farming is inherently different from most other industries. It is different because it is integral to our national soul as part of the countryside, our shared national environment, our identity. Knowing it's there is important, feeling it's done well is even more important. Today the real return on public investment in agriculture should be as much cultural as it is economic.

The changes necessary to bring farming into line with public values will not be delivered through change in the food market alone. So long as public money provides most farmers with all of their profit (through payments made under the EU's Common Agricultural Policy), government policy will continue to have a disproportionate impact on farming practice. It serves to insulate farming from consumer-led cultural change, in terms of diet, recreation, expectations of business and quality of life.

Putting farming back in line with public values would mean fresher, purer and healthier food, and much less air, water and soil pollution. A walk in typical countryside would be once again a delight rather than a disappointing and unsatisfactory trek through an agri-industrial estate. This is no utopian dream. It is a practical, achievable opportunity which government could take up.

Organic farming is not the whole answer but it does deliver a package of benefits: psychological, cultural, environmental, health, social and economic. The system encourages and embraces local sales. It yields healthier food, less greenhouse gases, less water pollution, better animal welfare, conservation of soils, robustness in the face of drought and is friendlier to wildlife. Indeed, organic farming increases the diversity of life at every level of the food chain – from lowly bacteria up to mammals such as bats.

Organic farming also demands an approach on the farm which is completely different from the heavy-industrial model of chemicals, contractors and centralisation. Its rewards go far beyond the agronomic. Organic farmers tend to be younger, happier and more optimistic. Organic farms also employ 32% more people than non-organic enterprises.<sup>5</sup>

Organic consumers are in many ways a mirror image of the farmers they depend on. They too have been pioneers at the forefront of a surging trend, and there is gathering evidence that buying organic is not an end in itself but a symptom of a deeper desire to change the way we live.

Organic farmers and consumers are more connected. Organic farmers indicate greater willingness to undertake direct, local marketing. A recent survey, reported for the first time here, also shows that organic farms are popular. Most people have either visited an organic farm and enjoyed it (10%) or would like to do so (46%).<sup>6</sup>

The work of Mintel, the Henley Centre, the Future Foundation and Cultural Dynamics<sup>7</sup> indicate that people buying organic are one indicator of a broader shift in a whole set of values. At one end we

have the booming 'experience economy', at the other, experiments in new lifestyles and a search for authenticity, meaning and community. In the middle there are products and services which package these things, ranging from health products, to ethically produced goods and certified foods. On some measures, current farm policy could be said to be out of kilter with almost 80% of the population.<sup>8</sup> People are already voting with their shopping baskets for a different food and farm culture. The majority of the population now buy some organic food, and an increasing proportion of the rapidly growing sales of organic food are local and direct, rather than through the supermarkets.

Government has recognised 'very high concern about modern methods of farming' but its answer to the woes of the countryside has been a one-eyed commitment to 'diversification', which means a move out of farming, rather than to put right the problems with food production.

Official sources constantly emphasise the importance of 'rural diversification' and the role of farms in tourism but look more closely at this picture and it is clear that farming as such is not very important to 'rural' and even 'farm' tourism, and food production often features not at all. Mazes, museums, cafes, restaurants, craft shops, animal collections, letting farm buildings<sup>9</sup> and nature areas provide economic benefits in a 'rural setting' but they are corner shops set in an agri-business industrial estate which is no longer economic.

So long as rural policy tinkers with non-food diversification, and while agriculture policy remains a last-century model, the 'food revolution' will not connect with most of British agriculture, to the detriment of the public and many communities, and the majority of farmers. Indeed farming for food production could gradually disappear from most of our countryside.

Neither managed decline nor new subsidy will ensure farming has a sustainable future. We don't need more subsidies, not even for organic farming, but government's role does matter. Government needs to be clear that public money for farming will produce quality of life benefits in every sense, in line with modern values. Farmers, retailers and growers will respond to such a vision, recognising signals that regulations and economic incentives will favour quality not just quantity.

We need a clear statement of government support for the type of farming which enhances the quality of life – through the food it produces, the environment it protects, and the values it promotes.

An active government vision to join up the food-quality revolution to agriculture can help bring about a renewal of UK farming based on the quality of life. The policy instruments needed to do this are largely in place. This report does not set out a detailed list of policy, administrative or legislative changes that the Government should make to achieve this vision. A combination of consumer demand, market growth, the existing farm payments that are not linked to any particular crop production, and the existing support for organic production, could, with the right encouragement, deliver the changes needed.

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# Introduction

## Why isn't Britain's food revolution leading to a revolution in agriculture policy?

On the one hand, sales of junk food are on the decline while those of fresh fruit, vegetables and organic food are rapidly rising. Schools are changing menus for more local, seasonal and fresh produce. Government policy on nutrition has begun to respond in line with changing consumer values.

On the other, the Government's sharpest vision for farming<sup>10</sup> is a narrow commitment to cut the financial costs of the Common Agricultural Policy. Its prescription for the countryside is a patchwork of 'diversification' and thinly spread environmental funding but with core farming activities left dominated by the entrenched interests of agribusiness: high chemical, low-labour, heavily mechanised and industrial.

Intensive industrial agriculture is a legacy of the twentieth century. It is an out-dated and unsustainable design. It is focused on feeding uniform cheap material into supermarkets and the food processing industry, and is driven by their needs. It stretches the seasons with heavy doses of pesticides and artificial fertiliser, which consumes climate-polluting energy and will soon be economically unaffordable. It moves food vast distances along vulnerable distribution networks. It has eliminated most wildlife from our landscape and is the source of well-founded concerns about disease outbreaks and novel risks such as GM.

A clear example is climate change. To produce a pint of milk from an organic dairy cow requires only a quarter of the energy used to produce a pint of milk from an industrially farmed-dairy cow.<sup>11</sup> Some of this is down to the use of pesticides but most of it is the hidden impact of artificial nitrogen fertilisers. These are made from natural gas and produced with a massive input of energy, most of it from carbon-polluting fossil fuels. Indeed the largest single change which many consumers could make to their personal climate-changing 'carbon emissions' would be to change their diet, with less meat and a switch to organic food. 31% of the global warming effect of European products is due to food production.<sup>12</sup> With the government failing to achieve its targets to limit climate changing emissions, this is likely to become a critical issue for food and farming in future.

The use of pesticides is integral to industrial, that is chemical-based energy-intensive, farming. This type of farming has only existed on a large scale for around 50 years. Pesticide use has gone hand in hand with artificial fertilisers, extensive drainage and elimination of natural and semi-natural features on farms. For example since the introduction of the Common Agricultural Policy in 1962 over 192,000 kilometres of hedgerows have been ripped out and 45% of our ancient woodland has been

lost in the UK. Agricultural pollution accounts for 70% of the total input of nitrogen pollution and 50% of phosphorus to surface waters in the UK.

There is evidence that the nutritional quality of food produced from conventional-chemical farming has declined. Between 1940 and 1991, trace minerals in conventional UK fruit and vegetables fell by up to 76%.

Sources minerals<sup>13</sup> nitrogen<sup>14</sup>

The cultural revolution taking place in our restaurants and kitchens is partly a reaction against the industrial and intensive system. It is being driven not by policy but by changing needs and values. Nor is it just about food: as we show below, research suggests it is part of a much deeper and wider desire to adopt healthier and greener lifestyles, and enjoy more rewarding experiences rather than acquire more material possessions.

To change Britain's food production for the better, we now need to apply the values driving the food revolution, to farming, to the 'food chain' and to the countryside.

The changes necessary to bring farming into line with public values will not be delivered through change in the food market alone. Few consumers or chefs run farms. Fewer still have a seat at

Whitehall discussions, but if their values were applied to policy for farming and the countryside, the effect would be revolutionary.

So long as public money provides most farmers with all of their profit (through payments made under the EU's Common Agricultural Policy), government policy will continue to have a disproportionate impact on farming practice. It serves to insulate farming from consumer-led cultural change, in terms of diet, recreation, expectations of business and quality of life.

In contrast, farming in line with public values would mean food would be fresher, purer and healthier. Air, water and soil pollution would quickly dwindle. A walk in typical countryside would once again become a delight rather than a trek through an agri-industrial estate. This is no utopian dream. It is a practical, achievable opportunity which government could take up.

This report argues that the rapid change in public attitudes to food should be matched by an equally rapid change in farming. An agricultural policy based on the new balance of public values, with a focus on the quality of food and our countryside, not quantity and cheapness, would provide a much-needed, positive vision for the future of UK food and farming.

Organic farming in the UK provides 32% more jobs per farm than equivalent non-organic farms. These new findings are based on the first national survey of employment on UK organic farms, carried out by the University of Essex for the Soil Association. The figure is based on the jobs provided by farms currently converted to organic production, adjusted to represent the balance of farm sizes nationally.

Farms currently farmed organically, although they include proportionally more extensive grassland farms, provide

almost 50% more jobs per farm and over 30% more jobs per hectare than non-organic farms.

If all farming in the UK became organic over 93,000 new jobs directly employed on farms would be created. This is sixteen times more people than were employed by the Rover car company when it closed in April 2005, and nearly ten times the number of jobs lost as a result of the closure of rural post offices over the last 15 years.

Source<sup>15</sup>

What is lacking at present is any coherent idea from the Government of what the future holds for British farming, apart from a managed but hugely subsidised decline. From the old, industrial agriculture, the key demand seems to be for new subsidies for anonymous, commodity crops to be grown for (usually unspecified) 'strategic' reasons. A one-dimensional strategy of looking for the future of farming from the next industrial 'rescue crop' will not work. In the US for example, the environmental basis of the vogue for ethanol cropping (designed to produce low-carbon biofuels) is being undermined by a cost-inspired shift to use coal to fuel the ethanol manufacture.<sup>16</sup>



# How farming should respond

Policy now needs to bring together the factors which could resolve many of the social, environmental and economic problems afflicting our farming, food and countryside.

## **Values – bring farming into line with public values**

Our food production must be led by and in the grain of evolving public values. It should no longer be imposed by government but government should establish a clear vision and sense of direction.

Too much of farming is currently not socially acceptable – it fails to delight<sup>17</sup> along our bridleways or footpaths, it fails to protect the health of consumers or those who live near sprayed crops, it fails to foster rural community and jobs, and it fails the challenge of global sustainability, for example on climate change.<sup>18</sup>

## **Local**

Food production needs to become progressively more local, as opposed to being transported long distances. Obviously existing arrangements cannot be dismantled overnight but the first step should be to divert all overt and hidden public investment in farming and food systems from those which clock up food miles, to those which encourage local production and distribution. The public benefits that can flow from this are multiple: from climate protection to the psychological and economic benefits that come with local marketing. Farmers' markets for example are widely praised for enhancing quality of life, community cohesion and happiness. A Hampshire survey showed the positive reaction of both suppliers and consumers.

## **Seasonal**

A return to greater seasonality is required. Consuming non-seasonal crops causes two types of environmental damage. First, the seasons of temperate crops are extended un-naturally, by heavy use of pesticides and fertilisers, or by heating glass-houses, to sustain growth at times of the year which are not naturally feasible. Second, until we replace fossil fuels in transportation, trucking, shipping and especially air freight, importing non-seasonal foods causes large amounts of food-mile pollution, damaging our climate.

Understanding the seasons and how and when to grow or gather fruit or vegetables should be part of the educational and personal development of every child. Adults shopping for food or deciding menus can enhance their experience by appreciating foods at the 'right time' instead of having everything to choose from 365 days a year: 'Christmas every day'. Meeting more of our nutritional needs around the year in the traditional way, can also lead to the use of a wider range of crops, with multiple benefits for consumers and conservation of rare varieties.

## **Fresh and Natural**

Hand in hand with more seasonal, comes more fresh and natural food. Fresh, as opposed to processed food is needed for good health. Diet-related diseases cost the NHS £4bn a year. Abroad, concern about the health effects of a diet disengaged from fresh local food has driven significant change. In Rome, the 'quality revolution' has led the City of Rome to provide 140,000 organic school meals a day.

Organic food contains, on average, higher levels of vitamin C and essential minerals such as calcium, magnesium, iron and chromium. In a review of 41 studies from around the world, organic crops were shown to have statistically significant higher levels of vitamin C, magnesium, iron and phosphorous. Spinach, lettuce, cabbage and potatoes showed particularly high levels of minerals. Nitrate levels in organic food are on average 15% lower. Scientists from Glasgow University have found a link between the levels of nitrates in vegetables and gullet cancer, which has trebled over the last 20 years

and claims more than 3000 lives a year. They believe that an increase in the use of nitrate fertilisers since World War II may be one of the main reasons for the rise in this cancer. Organic vegetables have higher levels (between 10% and 50%) of secondary nutrients. These include antioxidants which help to mop up harmful free radicals implicated in cancer. Deficiencies in certain vitamins and minerals can lead to a variety of symptoms including muscle cramps and depression.

Source<sup>19</sup>

### **Ecologically/environmentally integrated**

This means replacing the heavy industrial farming model of the late twentieth century with a lighter more energetically and ecological efficient and effective system. Organic farming has proven many of the technological steps necessary to achieve this. Without it we cannot protect water and air quality, biodiversity – the variety of life – and the ‘ecological vernacular’, the local distinctiveness of nature which gives the fine detail and texture to our landscapes. Throughout the duration of the industrial agricultural age, attempts were made to remedy the impact of intensive chemical farming on the environment. None of them properly succeeded. Even nature reserves cannot function optimally when surrounded by industrial farming, which is essentially a chemical industry run without the containment of a real factory.

Pesticides and artificial fertilisers are implicated in the decline of many once familiar species of wildlife. Organic farms are proven to be richer in wildlife. A 2005 review<sup>20</sup> published in the journal *Biological Conservation* concluded that some 76 studies of wildlife and farming ‘clearly demonstrate that species abundance and/or richness, across a wide-range of taxa, tend to be higher on organic farms than on locally representative conventional farms’.

### **Resilient**

Despite its impressive scale and intensity, the industrial farm-food system is inherently fragile and insecure. Too much rests on too few links, too little ecological variety, too narrow a genetic base, with a distribution system that is easily disrupted and which has no reserve capacity. The uniformity and centralisation of the industrial food supply system is a weak network, and susceptible to the rapid spread of contaminants or disease.

For example, discussing Supply Chain Vulnerability, the Director General of the British Retail Consortium told<sup>21</sup> a House of Lords Select Committee in 2005 that in the event of a major outbreak of avian flu in the human population:

The main points of vulnerability in the food supply chain would be heavy goods vehicle drivers; they are the people who get the product from the manufacturer to the retail distribution centers operated by supermarkets and of course the connection between the farms and the food processors and manufacturers.

Professor Norton, for the Institute of Directors added:

Over the last 10 years, for very good economic reasons and very good business reasons, we have taken much of the slack out of our systems in many sectors, whether it is retail or any other. I have personally driven campaigns on just-in-time manufacturing, removing stock and so on. I have observed that through that action – which made perfect economic sense - we do rely on the smooth running of our infrastructure far more than we did 10 years ago. The consequences of failure cascade much more quickly.

### **Humane**

Treating animals and sometimes people as equivalent to machinery has not only affected the soul of farming but offends the public. In industrial farming it has become normal to go to great lengths to conceal the reality of production systems from the consumer, often in the name of 'biosecurity'. Brands resonant of a bygone age of small scale mixed family farming are used to imbue production-line systems with utterly misleading qualities. The test has to be that a visitor finds conditions for farm animals and workers are better, not worse than they expected.

# Changing trends driven by changing values

People are already voting with their shopping baskets for a different food and farm culture.

At the turn of the century, the Government noted that 'There is ... very high concern about modern methods of farming' but added pessimistically:

Yet few discriminate in their purchasing of food ... in a way that would directly sustain the landscapes and biodiversity they value.<sup>22</sup>

Confounding this view, in 2005 Mintel found that in just the five years since that statement, the British market for organic food and drink had nearly doubled.<sup>23</sup> In the twelve months up to 2005, most British shoppers had bought something organic, and sales topped £1bn.

Back in 2000 a House of Commons Select Committee heard supermarket evidence that most customers would like to be able to do 'a complete organic shop'.<sup>24</sup> ASDA and NOP<sup>25</sup> found most people would like to buy more organic food if it were cheaper. At the time, the widespread assumption in policy circles was again that these 'wants' would not be expressed through action. The conventional view that foods such as 'organic' were just a niche or premium constrained by cost. Yet by 2005 Mintel detected clear signals that organic was going mainstream. Mintel wrote that organic:

'can no longer be seen as the preserve of the affluent foody. Amongst those who have purchased organic produce in the last 12 months, there is in fact surprisingly little difference between the better off ABs and those in the middle income C1 group'.<sup>26</sup>

Mintel also noted that 'shopping organic' signified something wider than just taste or environmental concerns. Julie Sloan of Mintel said:

"At the start of the millennium British shoppers were purchasing organic meat because it was a premium option. But more recently, growth has come primarily from consumers interested in the other qualities they believe organic meat has to offer, such as greater confidence in its food safety and a growing awareness of animal welfare issues".

UK Government figures show that between 1998 and 2001, at least 40 percent of fruit and vegetables sold by the top nine UK supermarkets contained pesticide residues. The Food Standards Agency reported in 2002: 'Data over the last 7 years indicates that there continues to be a high percentage of the pears tested (81% UK samples and 66% imported 2002) with pesticide residues'. In the supermarket Somerfield, 60 percent of

the fruit and vegetables contained pesticide residues. The latest (2005) government survey analysed 957 samples of food, including bread, butter, eggs, baby food, onions, rice, milk and mushrooms. Nearly a quarter (203) of the non-organic samples contained pesticides. None of the 85 organic samples were found to contain pesticides.

Sources FSA<sup>27</sup> and residues<sup>28,29</sup>

In 2002 the National Consumer Council found the issues people were most worried about included 'unhealthy diet', 'global warming', 'chemicals/pesticides in food', 'BSE' and 'GM food'.<sup>30</sup> Trend-spotters the Future Foundation commented 'rural entrepreneurs may be able to sight opportunities in marketing 'healthy' food, including organic farm produce. These concerns will become increasingly salient as the rate of obesity in the UK continues its present climb'.

The first few years of the twenty-first century have also seen an outbreak of interest in fresh foods and a return to greater seasonality in Britain's schools and kitchens.

A growing proportion of farmers have 'gone organic'. Some 4000 British farmers now manage their farms organically, representing 4% of Britain's farmland. (In Switzerland, more than 10% of the agricultural land is managed organically. The Swedish Government has set the goal of having 20% of farmland organic by 2010). While the UK's self-sufficiency in non-organic food is currently



falling, the proportion of organic food sourced from UK farmers and growers is increasing.

Organic consumers are also shopping more locally. Local and direct sales from organic farms grew by 30% in 2004, compared to an overall growth in organic sales of 11%. While continuing to rise, supermarket sales represent a declining share of organic (down to 75% in 2004 compared to 81% the year before). Overall, sales of organic food were £2m a week more in 2004 compared to 2003.<sup>31</sup>

Yet there are many barriers to this change and over 95% of Britain's farmland remains locked into the industrial model, serving the interests of the big food processors and supermarkets. For this potential to be realised, the emphasis of government policy needs to change.

The Future Foundation point out<sup>32</sup> that these changes are more significant than a fashion for food alone. They say:

Consumers are becoming increasingly more demanding in their expectations of producers and service-providers, both in the rural and urban economies, and they are making increasing 'postmaterial' demands of their products, such as that they be healthy or ethically sourced.

A concern to avoid new risks such as from GM-food, and new ethical standards are hallmarks of change alongside concern for personal health. The Foundation says:

Consumers attach moral significance to the way products are being produced and the norms and values involved. The UK stands out as one of the European countries where ethical purchasing is higher – that is, where people are more likely to buy particular products for political, ethical or environmental reasons.

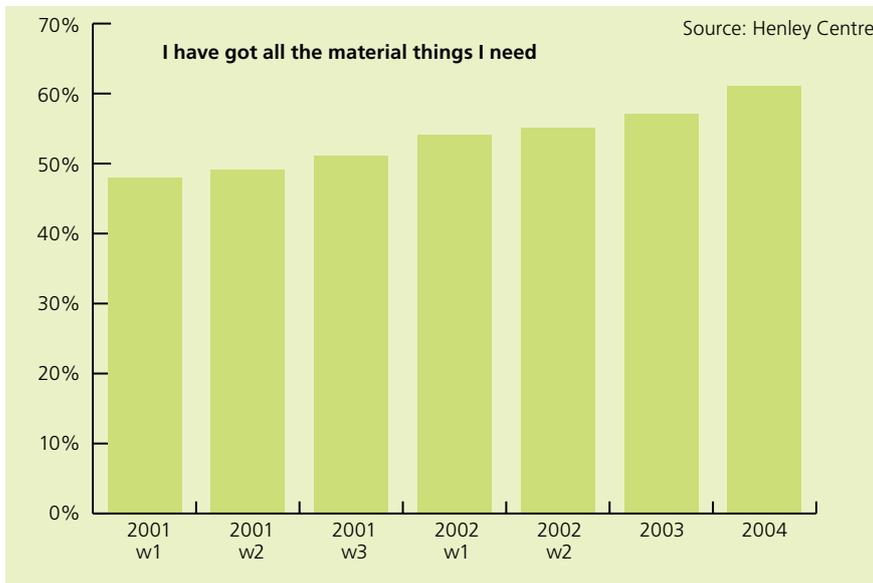
Illustrating such trends, between 1986 and 2002 the number of Britons reporting that they ate 'health foods' increased from just over 20% to over 35%. Numbers using natural medicines almost quadrupled to 20%.<sup>33</sup> Recent research for Seeds of Change shows that 'concerns about the environment' was the issue that 'strongly influenced' most people (41%) to try organic foods for the first time, beating 'concerns about food safety' into second place (38%). Motivations for continuing to buy organic food included 'taste' (48%), 'nutrition' (38%) and 'environmental concerns' (37%), closely followed by 'my health' (34%) and 'to support local producers' (32%).<sup>34</sup>

In a study for the launch of Natural England, the body which will replace English Nature, the Countryside Agency and the Rural Development Service (RDS),<sup>35</sup> the Henley Centre for Forecasting identifies over thirty major 'drivers' affecting the public and what it wants from the countryside.<sup>36</sup> Among these is a notable trend away from materialism, little-discussed in the media.

Henley notes that the number of people agreeing 'I have got all the material things I need' (see next page) has risen from 48% in 2001 to over 61% in 2004. 'Desire for material things', it says, 'is being replaced by a desire for higher needs such as belonging, community and experiences'.

The Future Foundation observe that 'this is captured in Maslow's notion of a hierarchy of needs – that both as individuals and as societies we turn first to fulfilling our basic human requirements such as food, sustenance and shelter, before moving up to physical security, psychological security via socialisation and finally self-esteem and self-actualisation'.

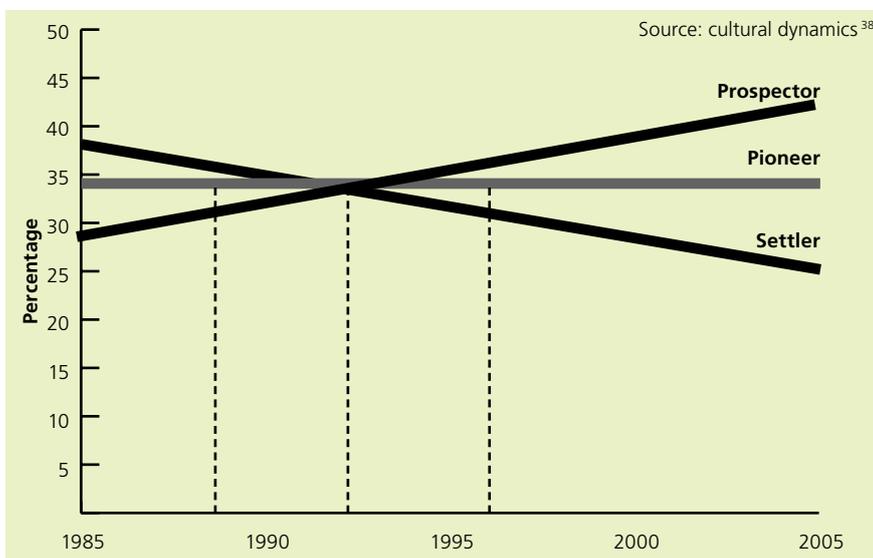
Although it is gainsaid by the example of organic food quoted above, it is often assumed that people only move on to want 'post-material' goods such as ethically or environmentally-sound farming or food, once they are very wealthy. This in itself could be expected to increase the demand for products such as 'organic' as most people have become substantially wealthier in recent decades but closer examination of the psychology of modern Britain suggests the values-change is even more significant than that.



Cultural Dynamics,<sup>37</sup> a company which maps these changes in detail, term people who are most concerned to meet their security and sustenance needs 'Settlers', those seeking esteem of others and self-esteem 'Prospectors' and the remainder who have moved on to search for new experiences and ethical living, 'Pioneers'. In policy terms, the problem is that British agricultural policy is still designed for a world where the main need was to provide for the 'Settlers': providing cheap reliable supplies of food, rather than quality food, for example. It is obviously not meeting the needs of the Pioneers, the trend-makers who began the campaigns and experiments that have triggered the food and environmental revolutions.

Not only do these people try new food and ways of eating – for example moving away from set meal times in the 1980s – they tend to see things in a wider context. Their actions later become the seedstock for 'fashions' when the esteem driven Prospectors take up the trend.

The proportions of Settlers, Prospectors and Pioneers have dramatically changed in the last few decades.



This shows that the biggest change is in the growth of the esteem-seeking Prospectors, at the expense of the traditionalist security-seeking Settlers (now just 21% of the population). What seems to have happened is that Pioneer trends such as organic food and healthy lifestyle are now also appealing to Prospectors (45% of the population). They are still seeking esteem but doing so partly through buying experiences rather than material possessions.

Both Henley and the Future Foundation note the growing trend for people to value and pay for 'experiences'. 'Consumer expenditure on personal experiences and life enrichment is growing much faster than that for material goods, and will continue to do so in future' says the Future Foundation. Henley comments: 'More and more products are wrapped up as experiences...the experience the countryside provides will determine how well it competes...'

The Foundation puts the growth of the 'Experience Economy' down to people becoming inner-directed 'Pioneers' but as the above diagram shows, the major increase is in the esteem-seeking 'Prospectors'. Most likely they and the Pioneers are seeking 'experience'.<sup>39</sup> Consequently up to 80% of the population are now becoming interested in things that a factory-floor countryside and a 'cheap food policy' simply fails to produce.

Politically this means that agriculture policy is severely out of step with the values of Britain.

Conversely, a change of policy would be widely welcomed. Numerous studies have shown the potential for the countryside to supply these new needs. The Henley project for example,<sup>40</sup> notes that countryside can help meet growing demands for people who

- crave nature as relief from the complexity and clamour of life
- have a focus on the importance of wellbeing and quality of life
- are aware of the environmental agenda

It points out that this represents, on various measures, the great majority of the population. Whereas a few years ago, 'environmental' issues were the domain of a few specialists and campaigners, now they are 'mainstream', transformed into lifestyle choices in Elle Deco, on TV's Grand Designs and a host of others.<sup>41</sup>

The willingness of many consumers to try and reduce their 'environmental footprint' is illustrated by the waiting list of more than 10,000 for domestic wind-turbines produced by the company 'windsave'. In 2005, a survey by ICM<sup>42</sup> for the Energy Saving Trust (EST) showed that people in the UK were more concerned about climate change than any other social issue, and almost a quarter wanted to lead 'greener' lives. It also found that more than half of consumers planned to spend more of their own money on energy efficient products and services over the next 12 months, while over 80 per cent would also like to be recommended more energy efficient products and services.

This is an example of cultural change running well ahead of government policy, which in the case of energy, still focuses on centralised power-supply choices, such as between nuclear or fossil power stations, rather than working to support householders' desire to generate their own electricity domestically. Government energy thinking is decades behind social values, akin to remaining fixed on 'mainframe' solutions when the market was ready for PCs.

Land, and thus farming and food production, is even harder to change: you cannot shift it abroad but nor can most people access it.<sup>43</sup> Economists point out that not all goods can be globally sourced, despite the food manufacturers and supermarkets' insistence that global sourcing of food will prevail. You cannot import a haircut. Nor can we import the experience of walking in Constable Country or separate 'place' from the memory of listening to a nightingale.

Only through new policies for food and farming can the majority of the modern public connect their values with the land.<sup>44</sup>

Non-organic farmers are equally stuck. Reliant on intensive applications of fertiliser, they are facing escalating prices because of rising costs of oil and gas, which may make many enterprises uneconomic. Analysis by researchers at Andersons for 2005 showed that the public money paid to farmers comprises 'almost all the return in UK farming for 2005'. In other words, almost all conventional farming in Britain is uneconomic in conventional market terms.<sup>45</sup>

#### **Farmers' markets – Values and People Connected**

Farmers' markets are popular because they enable people to act on their values, accessing good local, fresh and seasonal food, and meeting the producers. For example, at just the second Hampshire Farmers' Market, attended by 49 farmers and growers with 25 different ranges a survey found 95% of the 10,000 visitors were satisfied

with the market, and 98% would like to attend another. All the farmers and growers were positive, with an estimated business generation of £25 - £30,000. Local stores reported between 30%-50% increase in takings over the same day the previous year, even allowing for the Winchester Hat Fair held at the same time.

Source Farmers' Market<sup>46</sup>

There is also evidence that exercise in green spaces is more valued than other forms, and that a large majority of the population would like to move to the countryside, and those already there, are highly satisfied.<sup>47</sup> In the same way, there is a growing desire for 'community' and a rise in volunteering.<sup>48</sup> While schemes such as farmers' markets, farm visits and 'community supported agriculture' obviously tap into these needs, 'mainstream' industrial agriculture cannot easily do so.

The relative popularity of organic farming is indicated in a recent survey by the researchers Zomnibus UK for the Soil Association (March 2006). The survey found that: more than half the population would like to visit an organic farm, or have done so and found it enjoyable; although organic food costs more, a majority think it is a price worth paying; the overwhelming majority of organic buyers want to buy UK organic food; and only 43% of organic buyers would prefer to shop at a supermarket for their organic food, compared to 52% who would prefer farmers' markets, box schemes, farm shops and local shops like greengrocers or butchers.

#### **Community Agriculture and Organic Farm Visits – Values and People Connected**

Of around 400 organic farms listed in the Soil Association's Where to Buy Organic Food Directory, 144 offer day visits and walks, 158 offer educational visits and almost all sell at the 'farm gate'. The Soil Association works with 80 of these farms as part of its rapidly expanding Organic Farms Network. These demonstration farms reported over 184,000 visits to open days and guided walks, 40,000 on school visits and over 520,000 to farm shops and cafes. 1 in 7 non-organic farms engage

in some sort of tourism activity.

The farming equivalent of 'self-build', community-supported agriculture, brings together consumers and farmers to grow food. Started in 2002, for example, Stroud Community Agriculture now employs two half-time farmers with its 23 leased acres, helped by 98 member families plus 30 families on waiting list 'due to lack of space to grow more veg'. There are over 600 such farms in the US.

Sources – organic farms<sup>49</sup> and Stroud<sup>50</sup>

Zomnibus UK for the Soil Association March 2006; base – 1,000 weighted

**It's now possible to visit most organic farms to see how food is produced there. Which of these statements most applies to you?**

I have never visited an organic farm and am not interested in doing so	44%
I have never visited an organic farm, but would like to do so	46%
I have visited an organic farm and found it enjoyable	10%
I have visited an organic farm and did not find it enjoyable	–

**To what extent would you say you agree or disagree with each of the following statements? Organic food tends to be more expensive but I think it is a price worth paying**

Agree (strongly/slightly)	36%
Disagree (strongly/slightly)	31%

**I have more trust in organic food**

Agree (strongly/slightly)	36%
Disagree (strongly/slightly)	18%

**Organic food tends to taste better than non-organic food**

Agree (strongly/slightly)	42%
Disagree (strongly/slightly)	12%

**If all of the following outlets were equally convenient for you, from which one would you prefer to buy organic food? Base: Organic Product Purchasers (667)**

Supermarket	43%
Farmers' market	19%
Local home-delivery vegetable box scheme	5%
Internet retailer	2%
Farm shop	11%
Health-food store	1%
Local greengrocer or butcher	14%
Other local/high street shop	2%
Other	–
Don't know	4%

**Given the choice, would you rather buy a locally grown non-organic product or an imported organic product? Base: Organic Product Purchasers (667)**

I would rather buy a locally grown non-organic product	89%
I would rather buy an imported organic product	11%

**Now thinking particularly about shopping for organic products, to what extent would you say you agree or disagree with each of the following statements? Base: Organic Product Purchasers (667)**

**I like packaging to tell me about the farm a product comes from and/or the people who produced it**

Agree (strongly/slightly)	62 %
Disagree (strongly/slightly)	6%

**It is important for packaging to state a product's country of origin**

Agree (strongly/slightly)	81%
Disagree (strongly/slightly)	3%

**Low-price offers on organic products concern me because I worry about whether the farmer is getting a fair price from the supermarket**

Agree (strongly/slightly)	30 %
Disagree (strongly/slightly)	19%

In March 1998, the Bath Council's Farmers' Market was the only one in Britain. Now there are over 80. As the Winchester example (see box page 20) shows farmers markets are popular with both consumers and producers. In a University of Essex survey, organic farmers indicated a greater willingness to undertake direct marketing: 47% of organic farmers said that they were likely to market direct to the public in the future, compared to just 19% of non-organic farmers.<sup>51</sup> A 2004 survey by the ex-government agency ADAS reported that organic farmers surveyed were 'more content with their lot than their non-organic counterparts' – with 39% of them happy to stay in farming, compared to 26% of their non-organic colleagues.

A Soil Association report, *Organic Works*<sup>52</sup>, quotes a Defra survey:

Organic farmers in the survey were also more optimistic about handing on their farms to a successor. Sixty four per cent of organic farmers definitely or possibly expected a family member to take on their farm after them, compared to 51% of non-organic farmers. These findings support the experience of farmers converting to organic systems. For example, a Dorset farmer who recently switched to organic systems said that "The whole process of going organic has completely reinvigorated me."

These examples show how some food production connects with the changing pattern of British values. Yet despite their popularity both farmers' markets and organic farming remain small scale exceptions to the bulk of the farming and food system. 65% of organic food consumed in Britain is imported,<sup>53</sup> even much of that which could be produced here, and some organic food, produced in the UK and imported, does not meet the quality standards that consumers have a right to expect.

'Eating out' and spending more time as well as money on food, are integral parts of this more affluent experience-seeking trend. The 'eating out' market has grown by a compound annual growth rate of 7% over the past decade to £38bn in Britain.<sup>54</sup>

At the same time the countryside is increasingly valued for things other than food production. Unless something is done, there is a real likelihood that the 'food revolution' will not connect with most of British agriculture, to the detriment of the public and many communities, and the majority of farmers.



# A countryside without farming?

The Future Foundation notes:

There is a steady increase in outdoor recreation by tourists. An increasing number of people are participating in sporting activities across Britain as a whole. More leisure time, better communications and a greater emphasis on health and fitness have all contributed to the upward trend in sports participation. UK Tourism Statistics (2000) illustrate how active people are when visiting the countryside:

Walks of up to 2 miles (54%)

Walks of more than 2 miles (24%)

Field/nature study (19%)

Swimming (17%)

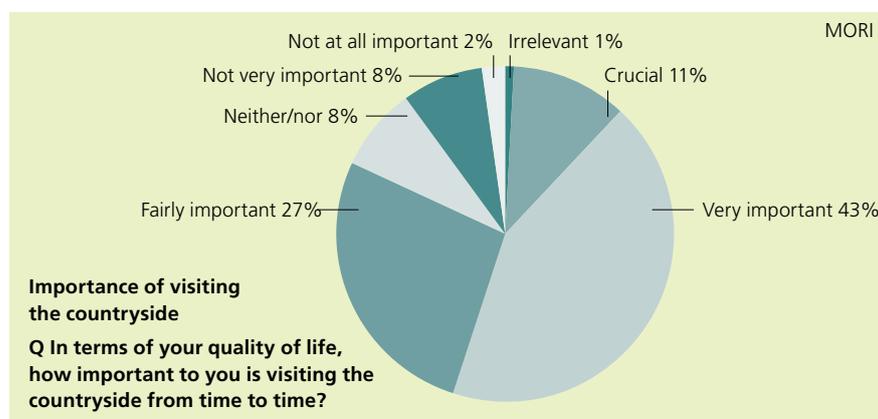
Visiting artistic/heritage exhibits (16%)

Cycling (9%)

It observes that tourism is particularly significant in rural areas. Recreation and tourism in the countryside employs more people than farming (both numbers and as turnover). Some 25,000 businesses are dedicated to rural tourism, supporting 380,000 jobs in rural areas<sup>55</sup> and yielding £14 billion a year for the national economy. Of this 72% was spent by domestic day visitors, 22% by UK tourists. It describes 'the "new" tourism: ecological, cultural, heritage and agricultural'.

In 2002/3 the top activities when visiting the countryside were<sup>56</sup>

- walking (33% of all visits);
- eating or drinking out (14%);
- visiting friends or relatives (14%);
- outdoor sports (8%);
- pursuing a hobby or pastime (7%), and
- 20% of tourists to the countryside claimed to be doing 'nothing at all'.



The Department for Environment, Food and Rural Affairs (DEFRA) has noted that a National Trust survey found that '78% of all holiday trips to the SW are motivated by conserved landscape.' In 2004 a MORI survey revealed 'the pivotal role that the countryside plays in the life of the British public'. Most British adults believe that being able to visit the countryside is important to their quality of life. For one in ten adults, visiting the countryside is not an optional extra, but is crucial to their quality of life.<sup>57</sup>

The countryside is most popular with the 25-54 age group says the Future Foundation. 'Overall, rural tourists are more upmarket than holidaymakers as a whole. Rural tourists are becoming more discerning; increasing demand for quality and more knowledgeable'.

Of course none of the agencies that collect these data – such as the Countryside Agency or the tourist boards or even DEFRA – will deny the role of 'farming' in providing the framework and backdrop for 'countryside recreation'. This plays heavily in the rhetoric of industrial agricultural interest groups such as the National Farmers' Union (NFU) but an increasingly critical public is likely to appreciate that there's a world of difference between empty chemically sterilised 'green concrete' farmland run by contractors, and one which is rich in birds, butterflies and wildflowers, free from spraydrift, and worked by people you actually get to meet. Unfortunately, most of the farmed countryside remains industrial. The majority of UK farming and food production is like a supertanker which has entered new social waters but is still propelled forwards with the momentum of its unsustainable twentieth century past.

The wide and loose use of the term 'rural' disguises the reality of what is happening in our countryside, and in particular, to agriculture. Study after study emphasises the growing importance of 'rural tourism', although for some farmers, because of their location, this will never be an option. Nationally, one in seven farms is said to be involved in some sort of tourism.<sup>58</sup> For the East of England, DEFRA states<sup>59</sup> that:

Rural tourism is an important feature of the region's economy. In 1997, the East of England received 16.5 million tourism trips, 66 million tourism nights' stay and 108 million day visits. The industry contributed £3.4 billion to the region's economy. Since 1992, the number of trips made by tourists has increased by 6% and the amount spent by 15%.

...Information provided by the East of England Tourist Board (EETB) has shown that 193 farms across the region have diversified into providing Bed and Breakfast accommodation. These account for 1,110 bed spaces. ...A further 42 farms within the region provide self catering accommodation.

DEFRA also notes:

The development of rural businesses through diversification of 'on farm activity' has sustained and created a number of jobs in the wider rural economy. Within the region agricultural work represents 2.8% of the total working population. However, when this work is linked together with food and tourism the figures increase to 12%. The East of England Tourist Board figures suggest that rural tourism was responsible for 1,843 jobs in 1995.

Look more closely at this picture and it is clear that farming as such is not very important to 'rural' and even 'farm' tourism. Mazes, museums, cafes, restaurants, craft shops, animal collections, letting farm buildings<sup>60</sup> and nature areas provide economic benefits in a 'rural setting' but they are corner shops set in an agri-business industrial estate which is no longer economic.

Similarly, national figures for 'rural tourism' take in the Broads, the Lakes, Sherwood Forest, the 13 million paying visitors to National Trust properties, the Pennine Way, and the host of nature reserves run by the RSPB and others. Nature reserves are important attractions for tourists. In



1996, for example, in the East, 32,000 people visited Welney Nature Reserve and 26,000 visited Wicken Fen Nature Reserve.

The idea that this activity is invigorating farming, or bringing it closer to people, is largely an illusion. A review of tourism in the South-west notes:

Customers are increasingly choosing their holidays according to the experience that they want rather than the location. Once they have decided on the experience they want, they then choose the location, according to what best suits their needs... Increasing numbers of visitors are looking for authentic experiences which provide a flavour of regional culture, traditions and history.

That 'authentic experience' is unlikely to include a trip into intensive fruit growing to supply a supermarket to marvel at the 36 different pesticides that can be sprayed 16 times on Cox's apples.

In the East Midlands, DEFRA finds that forty-four attractions have over 30,000 visitors a year – the most popular being Fantasy Island, Skegness, Lincolnshire and Clumber Park, Worksop, Nottinghamshire. In Lincolnshire two 'flagship attractions' are Farm World and The White Post Modern Farm Centre, with visitor numbers above 100,000 a year. The National Farm Attractions Network<sup>61</sup> provides a host of examples, mostly 'activity centres', shops and parks.

In the south-west, Dairy Farm World features the 'Bull Pen'; "... a world of excitement all under one roof. Play on Astra Slides, drop slides, ball pools, climbing nets, fireman's pole, tumble tower, and much more". The Dairyworld website,<sup>62</sup> whose home page cow has plastic udders, records the history of the farm. It reports:

The decision was made to install a new design of parlour, called the Rotary. The farm needed to upgrade its milking facilities to cope with a bigger herd and the design provided a perfect setting for the public to view the milking process. So started the link between town and country for which DairyLand is so well known. This farm became one of the first to open its doors to the public in the UK.

Today the farm is smaller, 120 acres (plus some rented land) yet more efficient. Twenty years ago it was a genuinely mixed farm, (beef, cows, sheep and corn) employing over 10 people on the farm. But the severe reduction in farm prices and the increases in government regulations forced the family to make major decisions. The policy was to concentrate on milking and growing grass.

Diversification has saved this farm and we are proud to be part of a thriving tourist industry in Cornwall. But what is the future for other family farms who may not be able to diversify or afford to re-invest?

There is nothing wrong with 'farm visits' to bungee jump or see polecats, goats or llamas, pet the guinea pigs or learn about rare chicken breeds but these are activities which in effect replace productive farming in order to make an economic and cultural link with the public. They act as a screen which hides the reality of intensive farming.

If the properties of the 'food revolution' do not also become drivers for farm policy, it is probable that the role of farming in our countryside will not only remain controversial but will diminish rapidly. There is a sound case for more land under conservation and wildlife management, some of which requires farming, particularly grazing of grasslands or heath, and hay-making. But there is also a huge potential to make environmental gains across productive farmland, if significant changes are made.

The alternative of sticking with present policy, is perhaps illustrated by the year-long 2004/5 study by the Centre for Rural Economy at Newcastle University and the Future Foundation. These two

groups conducted a 'Rural Futures Project' for Defra's 'Horizon Scanning Programme'.

The Rural Futures Project used existing geography, statistical pictures of seven different types of rural areas and 'blue sky' thinking to create three main scenarios for 2024 and four for 2054. It produced many interesting insights. It noted for example that many of the most important changes in the countryside came about not from 'rural' but 'urban' processes, and that the old rural-urban dichotomy is itself unrealistic in social and economic terms. A more regional approach does indeed make sense in many ways, not least for localising food supply.

In the Rural Futures Project, 'drivers' for change included developments in rural and regional governance, the differentiated countryside, rural economic trends, rural employment, urban-rural linkages, the future of rural agriculture, new farmer identities, social capital in rural areas, citizen and consumer values, tourism and leisure, individualisation, counter-urbanisation, population trends in rural areas, income and class structures in rural areas, educational patterns and the future of the rural landscape. Yet although values change was considered, the main emphasis was on economics and planning, and food and diet featured hardly at all. Indeed in the 119 pages of the 'knowledge base', diet is mentioned only once, in the context of new food risks.

This is not necessarily a criticism of those researchers. They also noted 'each scenario will be strongly social in character, describing the likely or possible impacts on rural society according to a typology of rural areas. The Rural Futures Project will, thus, complement *other* projects looking at land use, food production and climate change in the future' (our emphasis).

What happens though, if like DEFRA's studies, we do not connect food, and in particular the food revolution, in driving the future of the countryside?

One feature of the scenarios produced for DEFRA was that they all anticipated a diminished role for farming (that is, farming to produce food). The authors wrote:

In a number of our consultations with stakeholders, it was observed that there is no scenario which forecasts a return to a 'productive' countryside, 'productive' here being understood in terms of agriculture, rather than rural manufacturing, services, or the knowledge sector. Strictly speaking this is not quite correct: we do anticipate, in all of our scenarios, that some proportion of rural employment and a substantial amount of its land use will be devoted to agricultural production. However, in an era of globalisation, where trade agreements are increasingly requiring us to reduce agricultural subsidies, and in an era of EU Enlargement and CAP reform, simply to maintain the status quo will prove a substantial challenge. We do envisage that some farmers will succeed in capitalising on niche markets, such as branded local products, and that others may be able to take advantage of emerging technologies (such as biotechnology) to maintain the competitiveness of their business. Nonetheless, the fact remains that under any scenario the future role of agriculture per se within the English and Welsh rural landscape is likely to diminish in terms of its share of employment and GDP.

This states the conventional wisdom of managed-decline in British food production. With current policies it may well be right but it ignores the potential to apply the food revolution to farming in Britain.





# Conclusions

In its comments<sup>63</sup> on the Government's Vision for the Common Agricultural Policy, the Soil Association observed that a vision for farming in Britain is now urgently required.

It needs to update and take forward the initial, positive moves to reform UK agriculture introduced as a result of the work of the Curry Commission and the recent reform of the CAP. It must take account of global pressures (for example to end export subsidies and to increase free trade). It needs to take account of the realities of the constraints on the CAP budget. It needs to take account of the huge changes and new limits in a world threatened by climate change – continuing high oil (and Nitrogen fertiliser) prices, ever stricter limits on greenhouse gas emissions, and the environmental disruptions caused by climate change induced extreme and unpredictable weather conditions. It also needs to take account of, and work with, emerging market trends in food purchasing. Above all, the vision needs to reflect the values that commonly underlie European citizens' attitudes to the food they eat, and the countryside from which at least some of that food comes.

If agricultural policy remains on its present course, much of the British countryside will no longer grow food but will become a low density office and recreation park. Land left in conventional industrial agriculture will remain a source of pollution, largely bereft of wildlife and a significant contributor to climate change. In contrast, if farming policy, and the farm payments, on which British agriculture now depends economically, were redirected in line with changed public values, over time food production could once again become a loved and appreciated core activity in our landscape.

Such a policy would reverse many of the trends that have dominated 'agribusiness' farming but it is not a step back to the past. Rather it should enable food production to find a new place in the British countryside of the twenty-first century, which passes key tests of public acceptability, market popularity and social and environmental sustainability

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- <sup>2</sup> *Workshop To Inform The Future Strategy of Natural England*, July 2005 [http://www.countryside.gov.uk/LAR/Recreation/strategy\\_background.asp](http://www.countryside.gov.uk/LAR/Recreation/strategy_background.asp)
- <sup>3</sup> See for example 'A Vision for the Common Agricultural Policy' published on 2 December 2005 by HM Treasury and Defra
- <sup>4</sup> Total Income from Farming (TIFF) was £2.52bn in 2005, 11.4% down in real terms on 2004 and lowest since 2001. TIFF per head is calculated to have fallen 10.5% in real terms to only £12,500 per full-time worker. TIFF measures the return to the farmer for his/her labour, management and all capital invested in the business. The main reason for the lower TIFF was a fall in output of £0.23bn to just over £14bn – mostly due to lower prices. Despite rises in the costs of inputs, the quantity used fell meaning that overall costs were broadly similar to previous years. In line with decoupling, the Single Payment is not included in farm output but instead comes in as a separate income item. 'Total Income from Farming in the UK in 2005' and 'Net farm income and cash income by farm type in the UK for 2005/06', Defra, Jan 2006 <http://statistics.defra.gov.uk/esg>
- <sup>5</sup> *Organic Works*, Robin Maynard and Michael Green, Soil Association 2006
- <sup>6</sup> Zomnibus UK survey for the Soil Association, March 2006
- <sup>7</sup> [www.cultdyn.co.uk](http://www.cultdyn.co.uk)
- <sup>8</sup> Evidence suggests that both the 'inner directed' (35% of the population) and elements of the esteem driven 'outer directed' (44%) segments are now both favouring experience over material goods. Farm policy is still designed to meet the needs of a world dominated by the security-driven part of the population – focussed on survival, safety, belonging and identity – but this has now shrunk to 21% of the population.
- <sup>9</sup> A DEFRA report on incomes from Diversification in Agriculture shows the aggregate return on diversification activities. The definition of diversification is difficult to pin down (and collecting reliable information is difficult as well). The main analysis is on data from the Farm Business Survey in England;
  - of total farm business output of around £11bn in England in 2004/05, around £0.5bn came from diversification activities
  - of the 60,000 English farms large enough to occupy at least half a full-time labour-unit, some 46% had diversification activity. This generates an average income of £10,900 p.a.
  - if letting farm buildings is stripped out, the percentage of diversified farms drops to 19% *Diversification in Agriculture*, Defra, Jan 2006; [http://statistics.defra.gov.uk/esg/index/list.asp?i\\_id=014](http://statistics.defra.gov.uk/esg/index/list.asp?i_id=014)
- <sup>10</sup> See for example *A Vision for the Common Agricultural Policy* published on 2 December 2005 by HM Treasury and Defra
- <sup>11</sup> Cited in Pearce H et al *Double Dividend*, pub Sustainable Development Commission and National Consumer Council, pub 2005 ISBN 1 899581 64 2 Based on tables 16 and 17 in MAFF (2000) *Energy use in organic farming systems*. Ministry of Agriculture, Fisheries and Food, p12
- <sup>12</sup> Tukker, A et al, *Environmental Impact of Products* (EIPRO) Analysis of the life cycle environmental impacts related to the total final consumption of the EU25
- <sup>13</sup> Thomas, D, *A Study On The Mineral Depletion Of The Foods Available To Us As A Nation Over The Period 1940 To 1991*. Nutr Health. 2003;17(2):85-115 Mineral Resources International (UK) Limited Silverdale, Lower Road, Forest Row, East Sussex, RH18 5HE, UK. [david@mineralresourcesint.co.uk](mailto:david@mineralresourcesint.co.uk) The data used as the basis for this study was published in 5 Editions, initially under the auspices of the Medical Research Council and later the Ministry of Agriculture Fisheries and Foods and the Royal Society of Chemistry: Authors R.A. McCance and E.M. Widdowson.
- <sup>14</sup> The Royal Society have estimated that 70% of total input of nitrogen to the UK's inland surface water originated from diffuse sources, particularly agriculture – The Government's Strategic Review of diffuse water pollution from agriculture in England: *Agriculture and Water: A Diffuse Pollution Review* June 2002 Department for Environment, Food and Rural Affairs <http://www.defra.gov.uk/ENVIRONMENT/water/quality/diffuse/agri/reports/pdf/dwpa01-e.pdf>
- <sup>15</sup> *Organic Works*, Robin Maynard and Michael Green, Soil Association 2006
- <sup>16</sup> Amanda Griscom Little, Warts and Ethanol, Grist Magazine, 26 May 2006 <http://www.grist.org/news/muck/2006/05/26/unethacoal/index.html> A new reliance on coal could sap green cred from the ethanol industry
- <sup>17</sup> The Henley Centre observes, 'people are harder to please: product/service offers have to 'delight' – including countryside. *Henley Centre, Workshop To Inform The Future Strategy of Natural England*, July 2005 [http://www.countryside.gov.uk/LAR/Recreation/strategy\\_background.asp](http://www.countryside.gov.uk/LAR/Recreation/strategy_background.asp)
- <sup>18</sup> At just the second Hampshire Farmers Market, attended by 49 farmers and growers with 25 different ranges a survey found 95% of the 10,000 visitors were satisfied with the market, and 98% would like to attend another. All the farmers and growers were positive, with an estimated business generation of £25-£30,000. Local stores reported between 30%-50% increase in takings over the same day the previous year, even allowing for the Winchester Hat Fair held at the same time. <http://www.hants.gov.uk/farmersmarkets/market3rd.htm#2nd>
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- <sup>20</sup> D.G. Hole et al. / *Biological Conservation* 122 (2005) 113–130
- <sup>21</sup> Select Committee on Science and Technology, Minutes of Evidence THURSDAY 3 NOVEMBER 2005, Mr Kevin Hawkins, Director General of the British Retail Consortium and Professor Jim Norton, the Institute of Directors

- <sup>22</sup> *A Fair Deal for Rural England*, Rural White Paper, 2000
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- <sup>24</sup> 5.2 Agriculture Select Committee, Memorandum submitted by Iceland Frozen Foods plc (F44) <http://www.parliament.the-stationery-office.co.uk/pa/cm199900/cmselect/cmagric/681/0102512.htm> *What our customers want* Iceland's own research shows that 40 per cent of consumers are already convinced about the advantages of organic food. Research commissioned by Iceland shows health and environmental benefits are important to customers. 77 per cent of people said they would buy more organic food if it cost the same as ordinary food and 76 per cent said they would buy it if they knew it was better for the environment. Iceland's research also shows that there is a clear demand for a better range of organic food. 53 per cent of people questioned said they would like to be able to do a complete organic shop. Similar submissions were made by ASDA and others.
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- <sup>32</sup> Rural Futures Project: Summary of the knowledge base Prepared for Defra, Project SD0303, Future Foundation May 2004
- <sup>33</sup> Changing Lives in Vision, cited by The Future Foundation (Rural Futures Project: Summary of the knowledge base Prepared for Defra Project SD0303, May 2004 )
- <sup>34</sup> Ketchum for Seeds of Change; May 2006; <http://www.naturalfoodsmerchandiser.com/ASP/articleDisplay.asp?strArticleId=1911&strSite=NFMSite&Screen=HOME>
- <sup>35</sup> The RDS is the body which presently channels some £600m a year to 'agri-environment' schemes, in other words, payments to farmers.
- <sup>36</sup> Workshop to inform the future strategy of Natural England, Henley Centre. Appendix C: Trends assessment workshop presentation. [http://www.countryside.gov.uk/LAR/Recreation/strategy\\_background.asp](http://www.countryside.gov.uk/LAR/Recreation/strategy_background.asp)
- <sup>37</sup> [www.cultdyn.co.uk](http://www.cultdyn.co.uk) and material at [www.campaignstrategy.org](http://www.campaignstrategy.org)
- <sup>38</sup> [www.cultdyn.co.uk](http://www.cultdyn.co.uk)
- <sup>39</sup> Pat Dade of Cultural Dynamics comments (pers comm) "What the IDs (inner directeds) do today the ODs (outer directeds) will follow. It was the "non materialistic – I have enough" IDs who were the first to "buy experience" not "things" back in the 80s. This is an expected phenomenon. The motivations, and the subsequent efforts that can change or reinforce the behaviour, are however, very different. The ID's move to experience rather than things because they are aware of the "redundancy" of things, i.e. the third car doesn't give the same pleasure as the first car, the 20th pair of shoes doesn't give the same pleasure as the first or 10th pair of shoes...in fact it can feel as if more "time is spent" maintaining the things they have rather than getting on with their lives...this is one of the key orientations that drives the ID version of "downshifting". The ODs on the other hand have grown into the "experiences rather than things" as a natural extension of their desire to "acquire" symbols of value, i.e. the IDs have created a "symbol of value" of the "experience" and the ODs believe they can gain esteem by "doing the experience". This is in stark contrast to the ID motivation for experience. The ID's motivation is in line with their different motivations; in this case the need for "being... something other" and thus leading to another way of seeing the world – the world they are trying to understand"
- <sup>40</sup> Workshop to inform the future strategy of Natural England, Henley Centre. Appendix C: Trends assessment workshop presentation [http://www.countryside.gov.uk/LAR/Recreation/strategy\\_background.asp](http://www.countryside.gov.uk/LAR/Recreation/strategy_background.asp)
- <sup>41</sup> Jo Yarrow of consultancy Beyond Green ([www.beyondgreen.co.uk](http://www.beyondgreen.co.uk)) noted in February 2006: In the mainstream media at the moment, press columnists include:
- Julia Stephenson (the 'Green Goddess'...) in the Independent
  - 'The Green Builder' in the Independent
  - Lucy Siegle on ethical lifestyle choices in the Observer
  - Leo Hickman on ethical lifestyle choices in the Guardian
  - Christina Robert 'The Accidental Ecologist' in Easy Living magazine
  - Anna Shephard 'Eco Worrier' in the Times Body & Soul section
  - Vogue does a 'Spirit' page that often includes green lifestyle items
- Some papers and magazines are bringing out whole eco editions – the Standard's ES, the Times' Sunday Style

supplement. TV-wise, there was Penny Poyzer's No Waste Like Home series for the BBC last spring. Almost every channel and production company seems to be developing, or at least discussing green lifestyles programming: Sky 1 commissioned a pilot for a green lifestyles series last December. A pilot has just been made for Discovery Homes and Health, C4 is making a prime-time feature documentary on home waste production, and also developing a major new series that aims to 'do a Jamie Oliver for green lifestyles'. The BBC are hosting a major season on climate change

<sup>42</sup>[http://www.est.org.uk/aboutest/news/pressreleases/index.cfm?mode=view&press\\_id=428](http://www.est.org.uk/aboutest/news/pressreleases/index.cfm?mode=view&press_id=428)

<sup>43</sup>Despite this, a Joseph Rowntree study estimated that about 15,000 homes were self-built in 1999, representing 8.3 per cent of total new houses

<sup>44</sup>Another indication of the interest in having a stake in the land is the growing market for self-build. Self build homes now account for around 13 percent – over 20,000 of all residential properties built each year. <http://www.selfbuildabc.co.uk/>

<sup>45</sup>Total Income from Farming (TIFF) was £2.52bn in 2005, 11.4% down in real terms on 2004 and lowest since 2001. TIFF per head is calculated to have fallen 10.5% in real terms to only £12,500 per full-time worker. TIFF measures the return to the farmer for his/her labour, management and all capital invested in the business. The main reason for the lower TIFF was a fall in output of £0.23bn to just over £14bn – mostly due to lower prices. Despite rises in the costs of inputs, the quantity used fell meaning that overall costs were broadly similar to previous years. In line with decoupling, the Single Payment is not included in farm output but instead comes in as a separate income item. 'Total Income from Farming in the UK in 2005' and 'Net farm income and cash income by farm type in the UK for 2005/06', Defra, Jan 2006 <http://statistics.defra.gov.uk/esg>

<sup>46</sup><http://www.hants.gov.uk/farmersmarkets/market3rd.htm#2nd>

<sup>47</sup>The Future Foundation (Rural Futures Project: Summary of the knowledge base Prepared for Defra Project SD0303, May 2004) notes that when asked with respect to their residential preference, most Britons express a desire to get 'back' to the countryside; whilst those already in the countryside were overwhelmingly satisfied with being there. It cites a 1997 Countryside Commission survey showing that 89% of those living in the country or villages were living in their preferred location, whereas 51% of those in the inner city, 43% of those in suburbs and 39% of those in towns also wanted to join them. More recent surveys show similar results. Henley Centre, Workshop To Inform The Future Strategy of Natural England, July 2005 [http://www.countryside.gov.uk/LAR/Recreation/strategy\\_background.asp](http://www.countryside.gov.uk/LAR/Recreation/strategy_background.asp)

<sup>48</sup>Henley Centre comments 'There is a growing desire to 'give back'. 56% of people believe that quality of life is best improved by looking after the community's interest rather than simply their own'. 42% of people were involved with formal volunteering in 2003, compared with 39% in 2001. Those believing there was a sense of

community where they lived also increased, from 38% in 1995 to 52% in 2004. Henley Centre, Workshop To Inform The Future Strategy of Natural England, July 2005 [http://www.countryside.gov.uk/LAR/Recreation/strategy\\_background.asp](http://www.countryside.gov.uk/LAR/Recreation/strategy_background.asp)

<sup>49</sup>Rupert Aker [RAker@SoilAssociation.org] pers comm and [www.whyorganic.org](http://www.whyorganic.org)

<sup>50</sup>Nick Weir [nick.weir@freeuk.com] pers comm and <http://www.stroudcommunityagriculture.org>

<sup>51</sup>*Organic works*, Robin Maynard and Michael Green, Soil Association 2006

<sup>52</sup>*Organic works*, Robin Maynard and Michael Green, Soil Association 2006

<sup>53</sup>Soil Association, Organic Market Report 2005

<sup>54</sup>Martin Cottingham, Soil Association, pers comm – industry sources

<sup>55</sup>The Countryside Agency, 2002 cited by The Future Foundation (Rural Futures Project: Summary of the knowledge base Prepared for Defra Project SD0303, May 2004 )

<sup>56</sup>Great Britain Day Visits Survey 2002/03 cited by The Future Foundation (Rural Futures Project: Summary of the knowledge base Prepared for Defra Project SD0303, May 2004)

<sup>57</sup>Landscapes In Britain, MORI September 2004, [www.mori.com](http://www.mori.com) 3 September 2004

<sup>58</sup>DEFRA - <http://www.defra.gov.uk/erdp/docs/swchapter/section14/ruraltourism.htm>

<sup>59</sup><http://www.defra.gov.uk/erdp/docs/eastchapter/east14/tourism.htm>

<sup>60</sup>A DEFRA report on incomes from Diversification in Agriculture shows the aggregate return on diversification activities. The definition of diversification is difficult to pin down (and collecting reliable information is difficult as well). The main analysis is on data from the Farm Business Survey in England;

- of total farm business output of around £11bn in England in 2004/05, around £0.5bn came from diversification activities

- of the 60,000 English farms large enough to occupy at least half a full-time labour-unit, some 46% had diversification activity. This generates an average income of £10,900 p.a.

- if letting farm buildings is stripped out, the percentage of diversified farms drops to 19%

'Diversification in Agriculture', Defra, Jan 2006; [http://statistics.defra.gov.uk/esg/index/list.asp?i\\_id=014](http://statistics.defra.gov.uk/esg/index/list.asp?i_id=014)

<sup>61</sup><http://www.farmattractions.net>

<sup>62</sup><http://www.dairylandfarmworld.com/farmpark.php>

<sup>63</sup>The Soil Association's evidence to the Environment, Food and Rural Affairs Committee's enquiry into the UK Government's 'Vision for the Common Agricultural Policy'

### **The story of the lamb:**

A Dorset cross Shetland ewe and her twin lambs grazing organic grass at Sheepdrove Organic Farm, Lambourn, Berkshire (front cover). Male Suffolk cross lamb also at Sheepdrove Organic Farm (page 8). Sheepdrove's lambs go to Mutch Meats, at Whitney, only 12 miles from the farm, to be killed, and the meat is then hung at Sheepdrove Organic Farm Butchery Department. Carcasses are dispatched to Sheepdrove Organic Farm Family Butcher in Bristol (page 11) where the meat is prepared for sale (page 16). Sheepdrove's shop sells organic chicken, beef, pork, lamb and mutton and sales are increasing significantly each year (page 23). A popular cut of meat is lamb chump chops (page 26), best served grilled with salad, roasted potatoes, rosemary and tarragon mayonnaise (page 29) to make a delicious meal (page 30). Sheepdrove organic meat is available to buy at the shop in Bristol (3 Lower Redland Road, BS6 6TB) or on line for home delivery at [www.sheepdrove.com](http://www.sheepdrove.com)

Photographs by Jason Ingram



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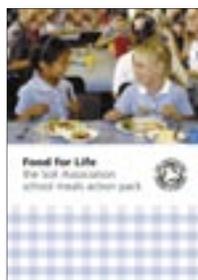
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Price £10.00

ISBN 1 904665 15 2

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