



FARM STUDY TOUR

Ten-page summary of key points

OCTOBER 2024

THE 2024 FARM STUDY TOUR



Our food system does an amazing job producing enough calories to feed us every day. But the way it's produced generates around 30% of greenhouse gasses, creates significant pollution, depletes biodiversity, erodes our soils, and generates high levels of food waste.

UK Farmers are working hard to adapt, to reduce some of these negative impacts. The Farm Study Tour, which visited four leading farms in early October 2024, aimed to create a better understanding between hospitality and the farming sector to build stronger collaboration in the future.



WHAT'S THE BACKGROUND?

THE FOOD SYSTEM

...has become large and highly industrialised, distancing us from the natural source of our food.

HEALTH

Globally we produce sufficient food, but there are still 800m hungry, and 1.8bn overweight or obese – the latter still rising. The UK has an obesity crisis.

NATURE

Since 1970 UK wildlife species have declined by 19% on average, and nearly 1 in 6 species (16.1%) are now threatened with extinction. Farming is a major cause of this.

CARBON

EU research shows that the global food-system emissions are **c15.8 GtCO₂e**, equating to 30% of the world's GHG emissions

INDUSTRIALISATION

Food production/manufacturing methods have negatively impacted nutrition and led to an unhealthy increase in consumption of processed foods.

FOOD SECURITY

Climate change and emerging rules on land use pose a risk to future UK food security



FARMING IMPACTS

SOIL

Conventional farming uses high chemical inputs which can deplete soils. Change has started, but many farmers remain stuck in a price/yield trap.

BIODIVERSITY

Chemical use and monoculture can also deplete nature, impacting complex bio-systems

NUTRITION & TASTE

Intensive production can also deplete nutritional content, and negatively impact flavour

POLLUTION

Excessive chemical use can lead to soil degradation, which in turn leads to “run-off” which pollutes rivers, and kills aquatic life, as well as causing flooding.

WELFARE

Intensive production and stocking reduces cost per kilo but can often reduce animal welfare standards beyond humane levels.

PERCEPTIONS

Farmers often get the blame for these impacts, but the story is more complex as the externalities within intensive production are invisible in the market.

TYPES OF FARMING

Much of UK farming is on a journey from highly intensive production to more sustainable methods, even when still farming conventionally. What is being farmed, where the farm is, and the market price of product all have a role in farming decisions. We should keep space for all types of farming within our food system – whether it is “better” conventional or other more naturally sustainable methods, **they will all have a place in our future.**

TYPE	CONVENTIONAL	ORGANIC	REGENERATIVE	ALTERNATIVE
What is it?	Use of unnatural chemical inputs, use of heavy tillage and monoculture to hit price points via high yields.	Uses entirely natural processes and resources. Legally regulated.	Aims for an overall positive impact on environment and society, by adopting sustainable approaches	A variety of other food production methodologies including Vertical Farms, Agroforestry and Aquaculture
Benefits	Lowest price. Single standards.	Better flavour, nutrition. Enhances soils, biodiversity and water. High welfare standards	Better flavour, nutrition, Improves soils, nutrients and other natural assets by diversity & integration.	Urban locations can deliver fresher product with less transport. Often much lower environmental impacts
Disadvantages	Can kill soils, reduce biodiversity, lower nutrition and flavour.	Lower yields than conventional, regulation adds costs	Not legally regulated. Highly farm specific.	High investment, low returns, high power costs. Very narrow range of products so far
Cost Impact	Lowest price if external impacts not costed in.	Often highest priced product	Higher cost than conventional	Variable – dependent on product and location.
Prevalence	Over 90% of all product	Around 5%	Under 2% but growing fast	Less than 1%
Hospitality relevance	Price sensitive catering with disinterested diners	Often used in high-end establishments or on selected highly visible lines	Provides access to better flavour, health and environment standards at lower premium	Highly suitable for city locations needing ultra-fresh ingredients

KEY UK FARMING NUMBERS



UK farming has a GVA of £13.7bn, 0.6% of total UK economy, and provides 462k jobs which is 1.4% of workforce



The UK has 209k farms, using 17m hectares, 70% of UK land



4 categories are over half UK farm production (by value) – Dairy, Beef, Poultry and Cereals are 57% of the total



By contrast, Vegetables, where imports are stronger are at just 11%, and Fruit and Potatoes are both 3%

Livestock production saw us produce £178m Chickens, 32m Sheep, 10m Cattle, and 5m Pigs (plus 2m Dairy Herd)



Average Farm Profit was £82k – with a low average of £23k in Lowland Grazing, and high average of £133.6 in Dairy



Direct Government payments averaged £25k per farm, which may soon be overtaken by diversification at £18k per farm



SOURCE: DEFRA 2023



KEY TAKEAWAYS

Everyone on the tour had their own particular perspectives and learnings, but the key ones seem to be these:

- ❖ Every farm and every hospitality operator is different. Be clear about what you want (reduce carbon, improve welfare, soil health etc.) and source accordingly.
- ❖ There is room for all types of food production, so select the best for your business.
- ❖ The system needs government intervention to incentivise the right sustainable outcomes from our food system.
- ❖ Our farmers are exposed to cheaper imports produced with lower environmental, nutritional and welfare standards.
- ❖ Buying better food is about impacts on nature and health as well as carbon.
- ❖ We saw many examples of tech making a difference to quality, animal health, animal welfare, and efficiency.
- ❖ Scope 3 carbon reduction is all about supply chain innovation.



GREAT QUOTES



“Farmers cannot go green if they are in the red”

“It’s all about collaboration – farmers, operators, suppliers, policymakers, & researchers, to find real-life solutions.”

“The further from the real, on-farm issues we get, the more seductive simplicity becomes and the more falsely successful it can seem.

“Big hospitality groups have resources...but independents have agility”

“If hospitality operators are serious about decarbonising their food, then they had better understand farming”

“We have a role to play in educating our diners about food sustainability, and giving them sustainable food choices”

“I had forgotten how damaging chemicals, antibiotics and imported feed are to the environment”

“It’s helped me think more widely about the value of our food – flavour, nutrition, nature – not just lowest price”



WE CAN HELP

Migrating from a food system based primarily around conventional farming, a heavy use of imported foods, and a reliance on intensive manufacturing and processing - INTO a more balanced approach that focuses progressively on flavour, quality, nutrition and the protection of nature/environment is no small challenge.

This will require hospitality businesses to have high quality data/analytics, and a depth of professional supply chain experience capable of delivering both new long-term supply partnerships and greater commercial efficiency.

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GLEBE FARM

As well as providing valuable content, insights and some delicious breakfast products, their financial support was fundamental to success



PEACH 2020

Provided practical support and advice with the marketing and promotion of the tour, and some extremely insightful content



OUR FARMERS

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