



RESILIENCE IN THE FOOD & FARMING SECTOR

IN WEST SUSSEX IN THE FACE OF CLIMATE AND SOCIETAL CHANGE

Prepared for: stakeholders in food, farming, producing, local government, local economic partners

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EXECUTIVE SUMMARY

Objective

The objective of my research and discussion project was to explore what the food producer and farming community in West Sussex felt was missing from economic and industrial support programmes for the area, what their individual and collective challenges are, and whether a new initiative - The Sussex Sustainable Food Festival - could be the right thing to support the food producing and farming sectors in the region. The fledgling idea also contained the potential to build an educative programme about food and climate change for schools to take place in the months/term preceding the Festival.

Process

I set out to:-

Interview a wide range of stakeholders about the future needs for WS food producing, farming and food business sector to thrive in the current turbulent conditions of economic, political, social and environmental change in person, by phone and by survey

Include micro and small businesses, consumer brands, national and international businesses based in the area, economic and local government planners and heads of sustainability, and those organisations adjacent to the thriving of the industry including water catchment projects, water providers, energy providers, and land owners.

Content

This Executive summary provides an overview of the key issues which emerged from the series of interviews. Full details of specific interviews and an expansion on the recommendations and ideas for action which emerged from them can be found in the full report.

- Overview
- External Trends
- The Absence of Brand Sussex
- Collective Action for Climate Change Resilience
- Inbound vs Outbound Activity
- Technology Investment
- The Future of Food Narrative

Addenda

Glossary

A Bioregional Learning programme (example)

OVERVIEW

I began this series of interviews with the idea of a Sussex Sustainable Food Festival and educational programme about food and climate change for schools in mind. There may still be room for this kind of festival and programme. Yet what I have learned in my conversations with all different kinds of stakeholders in the food system in West Sussex is that one-off annual events do not necessarily solve the challenges the industry faces, although they may have a place in an integrated strategy. This Executive Summary therefore brings together the challenges and ideas I encountered, and proposes a series of future actions based on the feedback I had, rather than the ideas I originally sought to investigate.

Multiple factors at a global, national and regional level are putting pressure on businesses in the growing, agricultural and food businesses in West Sussex. Whilst the sector and geography remain positive and buoyant, there is no question that converging pressures have the potential to create a perfect future storm for the sector in the long term future and that trading conditions in the present are fraught.

Current factors include:-

- Unpredictable trading environment due to Brexit and potential impact of WTO trading conditions
- Lack of consumer confidence due to Brexit (for consumer brands)
- Perceived) Lack of integrated economic, land, urban management strategy
- Lack of knowledge of existing routes to investment and innovation support; not enough options for investment and innovation
- Perceived) lack of understanding between producers and public
- Infrastructure challenges of the region

Future factors include:-

- Unpredictable path and impact potential of climate change on the landscape, including shifting patterns in rainfall, potential for sea-level rise, increase in extreme weather events
- Growing pressure on natural resources: water, soil, land, forest management
- Continuing rapid technological advances

At all levels, participants in the study expressed concern about a lack of joined up thinking across economic strategy, tourism, inbound trade opportunities, natural resource management, urban management (housing), land management and innovation. Whilst this may have been expressed as frustration by SMEs about the plethora of small event marketing opportunities between which they are compelled to choose or by concern in larger organisations about the difficult decisions ahead at the nexus of people/land/resources/economic wellbeing.

Some more specific issues are highlighted in brief below, together with short recommendations all of which are explored in more detail in the full report which is available on request.

EXTERNAL TRENDS

BREXIT & THE ECONOMY

Brexit and the economy continues to be by far the most urgent issue for most larger producers, affecting export planning, imports from overseas-owned farms in Europe, access to seasonal labour and currency fluctuations to name just a few. Although local fishing communities continue to thrive, there is both concern and optimism about what the changes of exiting the EU common fisheries policy may be.

Many organisations expressed a sense of frustration that, despite consistent efforts by growing groups and larger organisations, that there remains a lack of knowledge and understanding of agricultural challenges around investment, innovation, planning needs and economic growth in public authorities and LEAs.

CLIMATE CHANGE

Climate change is increasingly on the public agenda, driven in this last year by the global rise of movements like School Strike for Climate through activist Greta Thunberg and Extinction Rebellion. Many local authorities have declared climate emergencies.

Although the full potential impact of climate change is expected to affect, and is already affecting, other parts of the world, there is no doubt that changing weather patterns in the South are likely to impact the future of agriculture and growing in West Sussex. The potential for sea level rise, lowering of the water tables, collapse of the River Arun catchment area, increased demand for water from industry/public/agriculture may seem like future concerns but they are on the mind of all companies large and small.

Many organisations I spoke to expressed a sense of being under attack, not only from the changing climate, but from the public narrative which connects climate change to farming and agriculture.

Recognition was frequently expressed of the emerging efforts being made by two public authorities to engage in the climate change narrative: West Sussex County Council and Adur & Worthing Councils, but concern was still expressed that there is not adequate knowledge and communication about climate resilience with the agricultural community.

PLASTIC POLLUTION

During the period of this research, a seminar was convened by Chichester Harbour Authority, University of Brighton and the Chichester Harbour Club on plastic pollution in the harbour. The ever-expanding micro plastic concentrations are clearly having a significant impact on the long-term sustainability of oyster and mussel health. Whilst sources of plastic pollution are multiple, there is unquestionably a leisure impact from the sailing community and quite possibly nearby Southampton docks and cruise industry.

BIODIVERSITY LOSS

All farmers and producers I spoke to have some actions in place to mitigate biodiversity loss in the region and have adapted to emerging EU and UK regulations, although this is not a well told narrative. Between key stakeholders such as West Sussex County Council, Sussex Wildlife Trust and Sussex Biodiversity Record Centre, there is access to good data which is improving year on year about biodiversity in the region. As yet this is not linked across the growing and farming communities. Many narrative-based initiatives come out of the South Downs National Park Authority and areas of public access rather than being joined up to the whole land management community. Is there an opportunity to tell a positive story about the return of biodiversity in Sussex. The success of the re-wilding project at Knepp to engage the public is a useful indicator.

SOIL FERTILITY

Successive publications from the FAO on soil fertility have painting a globally alarming picture. "Soil Pollution: A Hidden Reality" published in 2018 proposed that globally there are less than 40-60 years harvests left in the soil due to over use of fertilisers and pesticides. A number of global soil health indicators are contained in the Global Land Degradation Information System (GLADIS) and the Status of the World's Soil Resources report (SWSR). Although this report did not explore in any depth the state of soil fertility in the region, is there a positive story that could be told here or is there a lot of work to be done?

SPECIFIC RESPONSES AND RECOMMENDATIONS

1. Brand West Sussex

Recommendation: develop a clear brand identity for the whole of West Sussex, but especially the food community is thought valuable. To shine a light on the breadth of both innovation and traditional food production in the region; the wide variety of food businesses from global food brands like Nature's Way, Langmeads and Prince's to local consumer brands such as Caroline's Dairy and the many brewing businesses, destination brands such as Edgecumbe's; and to emphasise the value of a blended approach to success of the food industry as part of the regional economy.



Why?: There was an overwhelming sense that West Sussex, and Sussex as a whole, despite previous efforts of the industry and local government, still lacks a brand identity when it comes to the food community and food production. The community feels that there is an opportunity through branding and narrative to deepen connection and commitment from residents of the region but also to capitalise on and increase inbound tourism to the region as a food destination.

It was also expressed that the overall identity of the area is still dominated by the historical estates landscape and that with so much land under private ownership and cultivation that this continues to shape the image of the region. Reference was made to the powerful influence of those non food luxury brands and ancient estates that dominate perception of the region, such as Goodwood, and Rolls Royce and the attention paid to the South Down National Park - which was recognised as vitally important to the area but separated from the conurbations and communities that are part of that geography.

There was a general sense that a concerted effort to shape the reputation of the region for the 21st century that incorporates all that is good about its heritage, whilst also incorporating and including its modernity through technology as well as what could be emergent potential for the future, is important. The growing community in particular pointed to the consistent increase in technology-led innovation in its sector.

Almost all of the interviewees expressed in some way a need for a better regional articulation of both brand, identity and economic strategy that could incorporate coast, land, and urban landscapes in a more holistic narrative about West Sussex.

2. Inbound Activity vs External Activity



Recommendation 1: a **consolidated digital platform** where all the multiple initiatives such as events, festivals, and open days could be gathered to make it easier for the public to find them, and easier for small brands to assess where to put their investment.

Recommendation 2: a concentrated **campaign within the region to drive inbound tourism** as well as deepen engagement with local residents with food businesses which would be adequately funded to allow for destinations to upgrade facilities and manage additional risk, closely linked to building the brand.

Why?

This section responds most to my original inquiry. Participants were not against the idea of a Sussex Sustainable Festival of Food in 2020, or the idea of supporting an educational programme on food and climate change, but all expressed concerns that single events - event if they were on-going over a period of 4-6 weeks - did not necessarily deliver systemic support to the industry. Rather they provided public awareness building, education and entertainment, and considerable additional work for brands and businesses for which it was very difficult to track and measure benefits.

Larger organisations expressed great willingness to engage with the general public in concentrated bursts at an appropriate time in the calendar. Many struggle to invite the public in at a time most suitable to the public, since that coincides with the busiest part of the growing and livestock season.

The most common challenge expressed by smaller food brands was the constant invitation to participate in micro events - from festivals to conferences - that require both financial investment and time; two attributes that are in short supply in SMEs and micro businesses. Although everyone recognised the value of publicly

attended events for awareness building and sometimes sales, many small brands are seeking on site engagement with the public. At the same time few can afford the facilities and insurances that attend opening up their operations to the public - whether in open days, talks, or school visits. Many expressed a desire to engage more with young people through school visits but also mentioned the difficulty in raising funds for coach trips.

There is still however significant support in the industry for a strategic action that combines public education and awareness, relationship building, commercial opportunities and a great desire to see that incorporated in an integrated consumer brand and inbound destination and trade mission.

3. Collective Strategy for Climate Resilience (in a Volatile Uncertain Complex Ambiguous world)



Recommendation 1: formation of **a backbone organisation** to support collective exploration in the region of the potential for climate and economic resilience; focused on building collaborations that bring governance, public and private sector, business, academia and civil society into the same room, as long-term resilience to climate change will take all of us working together.

Recommendation 2: an initial **learning journey** in the region to bring different stakeholders together in an exploration of both learning and inquiry to delve into difficult questions in an environment of safety and security. Detailed recommendations are attached as an addenda.

Recommendation 3: a collaborative bid to the new **National Lottery Fund for Climate** in partnership with the Bioregional learning Centre in the South Hams, and the Welsh government, to study and report on the potential for bioregional resilience as a key pillar of future economic strategy and climate resilience

Why?

Whilst the Brexit debacle has continued to occupy our thoughts, there are many other difficult decisions ahead of the UK in facing up to the potential impact of runaway climate change. Additionally, the existing global economy which has delivered so much wealth and growth is slowing significantly, and environmental pressures caused by our global trading system, strongly suggest a re-regionalisation of economics in the short and medium term future, and definitely in the long term. Emerging strategies such as bioregional economics and management require serious consideration for future scenario planners working in unpredictable and uncertain environments.

Although it was not present in all conversations, in the larger organisations with which we engaged, there was a palpable sense that dots have not been joined between long term economic strategy and climate resilience for the region. We discussed concerns such as seawater ingress, flooding, quality of soil, plastic pollution in waterways (especially Chichester harbour) impact of future extreme weather events. Participants also raised infrastructure choices such as zones for regional/housing development being taken without consideration for the overall regional picture, and the well known challenge of transport links.

Whilst there are obvious tensions between water catchment management and agriculture, there was also openness to explore the potential for more holistic discussions about the regional approach to resource management ideally in conjunction with the overall potential for economic and population growth/change.

Whatever strategy the region adopts for climate mitigation, it is apparent that it will require much closer and deeper relationships between industries, natural resource management, and public services. It necessitates spaces and fora to hold the difficult conversations carried out within integrity, that public scrutiny and the internet have made almost impossible. It necessitates a framework for deepening relationships in preparation for potential crisis and a shift from forecasting to scenario planning.

A good example of this kind of approach is the Coalition for Epidemic Preparedness. We know there will be epidemics in the future but we don't know what they will be, where or when they will break out. The CEPI is developing multiple vaccines for multiple diseases. It may be inefficient but it is robust. Epidemic responsiveness depends enormously on people who know and trust each other. Those relationships take time to develop, time is always in short supply during epidemics. So CEPI has put in place a programme of developing friendships, relationships, alliances now, knowing that many will never be used. It is a robust approach to uncertainty.

By putting in place an independent backbone organisation now to build relationships, explore difficult conversations, and develop trust between key stakeholders in the region, West Sussex can only strengthen its climate resilience.

4. Technology & Innovation Investment



Recommendation 1: John Hall of John Hall consulting held a very successful conference in 2018 which offered a **learning opportunity** to the WSGA community to learn more about emerging technology. Could this be developed further to include the wider agricultural community too or could a concurrent event be held for the wider community to explore the impact of exponential technology from robotics to satellite precision systems.

Recommendation 2: is there potential for **better advisory streams** through the local LEP together with the NFU and WSGA to make knowledge and awareness of investment and funding opportunities more widely available? (This may be already happening but is outside the scope of my knowledge and expertise)

Why? The continuing rapid development of new technologies, combined with ongoing turbulence caused by uncertainty about future trading conditions due to Brexit, and the lack of clarity around the potential impact of climate change, is creating a perfect storm for all kinds of businesses across the country. This is nowhere more keenly felt than in the agricultural and small business community

Whilst for larger organisations, diversification of risk has been possible - such as out of farming into leisure, tourism and housing - or smaller, highly specialised agricultural businesses, this is not so easy. All food business I spoke to were struggling to a degree with both the wide choice of technology options available to them, and the cost of implementing changes that may be required of them through the proposed Agriculture Bill in a post Brexit scenario, despite planning and support available to them through DEFRA.

5. The Future of Food Narrative



Recommendation: A **training programme** for representatives of the food industry on developing positive narratives and communications strategies, including social media management and media training.

Why?

All the food producers spoke of the pressure they feel under from the increasing narrative in media and by the public about the relationship between agriculture and climate change - especially livestock farmers. Most expressed a desire to engage more deeply with the public about the complexity of issues that surround the future of food production and the food system in which they operate. At the same time, few felt equipped to participate in the cauldron of social media debate, nor to find effective ways to bring discussion and learning opportunities to the public. There is an understandable sense of defensiveness of a way of life, but also a genuine desire to participate in open conversation - as long all sides of a discussion could be heard, including their own.

ADDENDUM 1: AN EXAMPLE OF A BIOREGIONAL LEARNING JOURNEY

From September 9th-16th, the Bioregional Learning Centre in the South Hams, Devon, is running a bioregional learning journey. The objective is to bring together multiple stakeholders inside the region to explore the interconnectivity of communities and resources in both a learning and creative inquiry mode.

The South Hams bioregion is both similar and different from the Arun watershed in multiple ways. It has four major rivers draining from Dartmoor to the ocean whereas we are dependent on the Arun as the sole significant river in our region. It is bordered by one major town Plymouth where the Arun watershed contains multiple large conurbations. It has much more livestock farming than growing but has a thriving seafood industry. It has a stronger identity as a tourism destination, and at the heart of the Hams is the creative centre of Totnes and Dartington which houses a lot of social innovation and experimentation.

Below is the learning programme which could form the basis for a similar first venture if a backbone organisation is constructed.

Bioregional Learning Journey
Experience first-hand how South Devon is building climate resilience
9-14 September, 2019

THE BIOREGIONAL LEARNING CENTRE

Mon 9th Day Programme (1)
River Soil, Food & Enterprise
Climate impact issues in the lowlands of the River Dart catchment. Soil retention. Water quality and quantity. Food security. Stewardship of natural resources. Biodiversity in a wildlife corridor. Transport and networks. Innovation.
Making a Timeline "Human Response to Ecosystem Change" with Glenn Page, our bioregional colleague from Maine USA.
Book for a single day or more. Limited places, apply to participate.
Cost options: £90 per day includes lunch and transport. £120 per day includes lunch, transport and dinner with the team.
Programme timing: 9.30am to 6pm

Tue 10th Day Programme (2)
City Energy, Housing & Wellbeing
Climate impact issues in the City of Plymouth: Generating and storing clean energy. Health, including mental health and wellbeing. Provision of fresh food. Military legacy. Seaside-based economy. Ferry link to Europe.
Evening Conversation Cafe: Delicious dinner with local food. An opportunity to meet and talk at small tables with people from different backgrounds and shared concerns. Speakers TBD. Open to all. 7-10pm. The Barnet House, Totnes. £20, no food fee.

Wed 11th Day Programme (3)
Moor Water, Wildlife & Stored Carbon
Climate impact issues on Dartmoor: Capturing and storing water. Farming for the future. Preservation of wild places. Heritage and tourism.

Thu 12th Event (4)
Water Resilience Summit
A day of action-orientated discussions to explore what water resilience (and non-resilience) means for people, communities, businesses and the environment. Hear inspiring stories from local resilience 'champions' about the impacts and challenges they are facing and the actions they are taking to overcome them. Co-located speaker: Dr. Nick Pelling from Wadsworth Rivers Trust. "How water resilient is Devon now and what can we do to improve it?"
Free, open to all. 10am-4pm. Totnes Civic Hall.

Fri 13th Day Programme (5)
Coast Fishing, Infrastructure & Culture
Climate impact issues in Brixham and Torbay: Sustainable fishing in warming seas. Catch value. Sea walls and flooding. The role of culture in imagining the future.

Sat 14th Half-day Programme (6)
Making Bioregional Transformation Visible
In this optional half day we'll pull together our learning and co-design next steps towards a regional resilience strategy. Identifying who else needs to be 'in the room'.
With the timeline, we'll look at how to fit, and opportunities for, climate resilience given this bioregion's unique characteristics.
Planning together for the Resilience Summit, open to all in South Devon in September 2020 we will be:
• Locating the leverage points where small shifts might lead to big change
• Exploring how governments, business, civil society and academics can work together
• Researching the needs of future water business economic need
• Finding our agencies and all at all levels.
Free for Day Programme participants. 9.30-1pm.

For details and to apply, contact: isabel.carlisle@bioregion.org.uk

21/04/19 All aspects of the Learning Journey are subject to change.

CONTRIBUTORS AND INTERVIEWEES

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