



Fair Value in Surrey's Food Supply Chain



CENTRE *for*
BRITAIN &
EUROPE

UNIVERSITY OF SURREY



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UNIVERSITY OF SURREY

Spring 2024

Fair Value in Surrey's Food Supply Chain

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Department of Politics, University of Surrey

*As part of the APPG on Fair Value in the Food Supply Chain, and the Rural Policy Group, this report provides a county-specific focus on farm-based food production in Surrey. It looks in detail at the current state of play within Surrey's food supply chain, investigating the type and role played by Surrey farms, its imports and outputs, labour, contract terms and relationships between primary producer and retailer. Within this context, the report drills down into the argument for farmers' relationship with **fair value**, by evidencing the profound but unrecognised "contribution the [food] industry makes to the wider economy, environment and society in the county" (RPG, 2022). This represents the background conditions, or **input**, of the current situation, regarding fair value. The **output** is what is required (via improved awareness coupled with cross-sectoral support and government assistance required for genuine, financially viable and sustainable fair value). The report concludes with **policy suggestions** regarding the need to address power imbalances within local and national food supply chains, based on improved support for fair values within the UK's overall food supply chain, and the requirements from farming from the next UK government.*



Table of Contents

Researchers	3
Part I: Introduction	4
Part II: Trade and Markets.....	7
Part III: Labour.....	13
Part IV: Costs and Subsidies.....	16
Part V: Farming as a Business	21
Part VI: Access to Market	27
Part VII: Sustainability.....	32
Policy Suggestions for Enhancing Fair Value in the Surrey Supply Chain	35
Bibliography.....	38
Annexes.....	41
Endnotes	44

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Part I: Introduction

The Rural Policy Group's 2022 *Sustainable Food Report* was emphatic from the outset. It argued clearly that immediate action is needed by government, business and science acting together to halt the decline of agriculture as a sector, support farming as an industry, and widen knowledge of land management.ⁱ The report's case study was Lincolnshire's 'UK Food Valley', illustrating regional clusters of agricultural output, the role of agri-tech and innovative technology, and labour, with financial analyses and policy suggestions highlighting the need to stimulate commercial investment, sustainability policies, economic stability and 'power imbalances within the food supply chain'.ⁱⁱ The focus for 2024 is on Surrey, and the south-east of England more broadly. As explored below, Surrey boasts a wide number of its own agricultural and rural enterprise clusters, with advanced asset values in key parts of its land and supply chain operations, scope for innovative engagement with stakeholders including county and borough councils, a wealth of local businesses and the University of Surrey to improve investment, R&D and skills infrastructure, improve in-county food security, as well as dramatically resetting the valuation of food and the food agenda.

2024 sees the persistence of many of the same challenges that have beset rural enterprises in the past few years: Covid, Brexit, cost of living, inflation, sustainability changes, financial instability, lacklustre investment, and ongoing asymmetries regarding fair value in the food supply chain. Equally, as the report explores, Surrey offers variety, innovation, responsiveness and resilience across key parts of its agricultural output, its rural economy, and its farming practices in particular. Indeed, Surrey's rural economy has since the 1950s demonstrated how the county's farmers and producers have continually, successfully adapted their approaches to protect farm incomes including through business diversification and technological innovation while addressing market challenges like milk pricing.

With its overarching focus on **fairness in the food supply chain**, this report takes an explicitly Surrey-specific approach to investigating the challenges of equity involved in the business of farming, setting as context the impact of UK and global trade patterns, market uncertainties, the role of labour, tensions between input and output costs for suppliers and retailers, challenging relationships with major retailers, and the role of energy and sustainability targets. The report concludes with a variety of targeted policy suggestions.

Again, the point of the report is to highlight the need for improved 'fairness in the food supply chain' and to foster this debate among parliamentarians, business, industry and academia by highlighting a few, vital policy suggestions that can sensibly be taken up in the short-term for the benefit of the long-term by the UK government (Sustain, 2024a). We therefore set the stage with a few key points:

- As per the 2022 RPG, there is a 'need to redress power imbalances within the food supply chain to provide all parties with a return that covers their cost and incentives effort' (p. 41).
- 'Without more fairness in the food supply chain, good farming will always be on the brink of financial viability. Farmers cannot keep going if they are denied commitment and security and are not making a reasonable profit' (Sustain, 2024a, p.1).
- 'Farmers must be at the centre of this transition in our food system. They are the custodians of the land. They know better than anyone how depleted the soil is and how reduced wildlife

numbers are. Many farmers are already trialling new ways to manage their land for the benefit of nature' (National Food Strategy, 2024, p.11).

The focal point of this report is Surrey itself. Surrey has a strong agricultural history. A large part of Surrey's economy is farming. There are around 500 farms in the county and the agricultural sector contributes £502 million to the local economy, accounting for 14 % of the national farming income in 2020 (which was £813 million in the southeast in 2022) (DEFRA, 2023).

When comparing the average area of farms in Surrey and the South East region against the country average, it can be seen that Surrey farms are generally smaller. The average farm size in Surrey region is 50 hectares, much less than the regional average of 88 hectares achieved in the wider south-east of England (DEFRA, 2023) which matched the English average. It is this measure at which it can confidently be said that while the makeup of the Surrey agriculture industry is somewhat more diverse, the farms themselves are smaller, owing to the high cost of land in the region.

The diversity of agricultural business in Surrey is evident - the area grows a wide range of plants and animals. Surrey farms many kinds of vegetables and fruit, cereals and flowers. The livestock farms also range from cattle and cattle-breeding farms to sheep, pigs, and poultry. Since the 1970s a number of former dairy herds on estates and larger farms have been replaced by beef cattle. Grazing land has been reduced, partly through the demise of smallholdings as demand for new housing developments has grown because of Surrey's proximity to London.

Report Methodology and Stakeholder Engagement

Assembled by the Department of Politics' Centre for Britain and Europe, based at the University of Surrey, this report has benefitted from information gathered from publicly available datasets identified by the Information Rights Team at DEFRA (Department for Environment, Food and Rural Affairs), the Department for Business and Trade, and the Department for International Trade.

As identified in the references, other key sources include outputs by the Rural Policy Group (RPG); Country Land and Business Association; National Farmers' Union (NFU); Department for Environment, Food and Rural Affairs; House of Lords Horticultural Sector Committee; House of Commons Environment Committee; Guildford Borough Council's *Rural Economic Strategy 2017-22ⁱⁱⁱ* plus written evidence (2019) by the Council on Achieving Net Zero in Agriculture (to House of Commons Environment Select Committee); Sustain/Sustainable Farming Campaign; analysis on rural Surrey provided by Cirican Consulting; National Food Strategy; Surrey Research Park, as well as relevant academic analysis.

In terms of engagement, we are incredibly grateful to key stakeholders who provided vital insights from the RPG, NFU, as well as Collison and Associates, Surrey Community Action, Action Hampshire, City Harvest, and Hampshire Rural Forum. Special thanks in particular to Chris Stanton, Rural Economic Advisor, who has worked with a wide range of prominent Surrey-based public sector actors, and whose superlative help with data crunching, personal insights, and overall analysis that has improved the overall quality of the report in many ways, and to CBE Business Manager Maya Chew for her eagle-eyed editing and formatting.

The datasets support the (University of Surrey) Centre for Britain and Europe’s review of Fair Value in Surrey’s Food Supply Chain as commissioned by the Rural Policy Group on behalf of the All-Party Parliamentary Group (APPG) on Fair Value. The main data are included in the Annexes.

The report comprises a mixed method approach, combining statistical analysis of key data, quantitative analysis of datapoints and sectoral trends, qualitative analysis of government and stakeholder sources, as well as some media coverage, combined with group-based and individual online and face-to-face forums with key stakeholders from across the fair value ecosystem.



Part II: Trade and Markets

Context

From 31 December 2020, the free movement of people and goods and services between the UK and the EU ended. This changed the way HMRC collects trade in goods statistics. Regional trade in goods statistics (RTS) are derived from Overseas trade statistics (OTS) data by making use of transaction information such as commodity code, value of trade (in £), weight of trade (in kg) partner country/country group and other data fields.

In the year to March 2021, the overall value of UK trade in goods exports decreased by 15% compared with the same period the previous year. The overall value of imports decreased by 12% over that same period (*when Covid lockdowns were also at their peak*). Each UK country and every English region saw decreases in the values – and annual values – of both exports and imports. Major changes to the collection of trade data occurred after the UK left the EU and as a result there is a break in the timeseries for published UK to EU export statistics from January 2021. From the 2021 Q1 2021 publication, there were 2 consequences of these changes in data sources:

- EU and total UK business counts are no longer available.
- Customs export declarations to the EU that fall under the statistical value threshold of £873 (in value) or 1,000kg (in net mass), cannot be assigned to a UK region and are therefore reported under “Unallocated-unknown” category.

The result is that Customs Declarations with commodity line values of less than £873 and where the weight of the goods are less than a tonne (1,000kg) go into ‘low value aggregates’, but no business information on these traders is available as part of the UK trade in goods processing. As a result, such trade cannot be assigned to a UK region, therefore the value is assigned to the Unallocated-unknown ‘region’. This is in line with the RTS methods used for trade with non-EU countries, which are also sourced from Customs declarations.^{iv}

In terms of UK Trade Imports and Exports between 2018 and 2021, all UK counties saw a decrease in value of exports. There was also a decrease in annual export value for all English regions. All UK counties also saw a decrease in value of imports. There was also a decrease in annual import value for all English regions. The South East and London accounted for the highest levels of both exports and imports compared to all other regions. See Annex, Figure 1 for UK Imports and Exports by Region, year to March 2021.

UK Exports and Imports

The total value of UK exports decreased by £50 billion (15%) to £288 billion in the year ending March 2021 compared with the same period the previous year. Figure 2 in the Annex shows the total value of UK exports by region for the 3 annual periods ending March 2019, March 2020, and March 2021. Meanwhile, the total annual value of UK imports decreased by £55 billion (12%) to £412 billion in the year ending March 2021 compared with the same period of the previous year. Figure 3 in the Annex shows the total value of UK imports by region for the 3 annual periods ending March 2019, March 2020, and March 2021.^v



South East Agricultural Outputs

In the South East (including London) 56% of total agricultural outputs were crops while livestock accounted for 27% of the region's outputs. In relation to the other seven English regions, the South East (including London) represents agricultural outputs that are:

- 4th largest in terms of farm income, behind the East of England, East Midlands and South West: accounting for 12.2% of the UK's total farmed areas (1,099 m hectares out of 8,999 m hectares);
- 1st jointly with Yorkshire and The Humber for the largest percentage of farms (14%) smaller than 5 hectares;
- 2nd largest behind the South West for the percentage of farms (29%) of between 5 and 20 hectares;
- 1st for the largest number of workers per farm (3.6);
- 1st for the percentage of casual workers (29%), making the South East labour force the 2nd largest behind the South West;
- 3rd smallest for the percentage of dairy farm holdings.^{vi}

In 2022, the South East and London Region's largest contributors to the gross output value (£2.6 billion) were wheat (£484 million), fruits (£360 million), milk (£206 million) and plants and flowers (£194 million). These commodities accounted for 47% of the region's total output. The average farm size in the South East and London for 2023 was 88 hectares. This is the fourth smallest average farm size of all the English regions and equals the English average of 88 hectares.

National and Regional Trade and Market Patterns

The UK's annual trade patterns are inextricably related to consumer needs, most notably the year-round desire for fresh fruit, particularly exotic and out-of-season types, needing procurement from climates favourable to consistent production. As a result, the country relies largely on international trade to supply its various fresh produce requirements. This shift in consumer preferences away from seasonal British fruits, which now account for only 17% of domestically grown fruit versus 55% for vegetables in 2022, has forced supermarkets to rely heavily on imported goods, exposing global supply chains to climate change and water scarcity risks. Prioritising year-round access to out-of-season produce unintentionally leads to environmental harm while underutilizing the UK's capacity to produce high-quality agricultural items domestically.

Brexit, Covid and Ukraine

The 2016 referendum to leave the EU was the start of a politically chaotic process that continues to have an effect, not least in identifying meaningful comparative data from which firm conclusions can be drawn to shape future agricultural trade policy. Trade agreements and fair-trade agreements, which arose within the Brexit debate (and again more recently) also contribute to market access opportunities and ensure a level playing field for Surrey farmers. Their reaction to Brexit was mixed - while some posted roadside signs to “Take back control” others wanted to stay in the EU Single Market and/or be able to access the EU Customs Union (as non-member Turkey does now through its own agreement with the EU). With the expiry of the Brexit transition period on 31 December 2020 went key benefits such as free movement of workers and the protection afforded under internationally agreed standards in food quality and animal welfare. Many in farming are concerned that where UK trade agreements have been reached, the UK has too readily sacrificed equivalence of standards in favour of liberalising the market for agri-food to the detriment of domestic producers - resulting in increased costs of doing business.

COVID-19

Following Brexit, the Covid pandemic of 2020/21 compounded uncertainty around future migrant labour needs against availability; in recent years some UK crops have gone to waste due to EU workers returning home and no local workforce emerging to take on harvesting. Post-Brexit subsidies exist to replace those discontinued under the EU's Common Agricultural Policy (CAP) – the EU's former LEADER programme was especially successful and largely valued by UK farmers (aside from the perceived bureaucracy of application, delivery and reporting).

Ukraine War

The geo-political upheavals emanating from Russia's war with Ukraine since 2022 have also impacted UK prices through higher food production costs (including animal feeds) and increased energy costs as well as current and emerging Government policy on employment of migrant workers, including those from non-EU countries. More broadly, climate change and related environmental challenges have – together with the UK's decision to leave the EU – seen Surrey's farmers and producers (and many across the South East) adapting pro-actively to create successful new vineyards, deliver more sustainable farming practices and support Biodiversity and Nature Recovery. Of note is that since October 2023, each county is now required by law to have a Nature Recovery Strategy; explored below in terms of energy and sustainability.

Overall, the cost of UK sourced food supplies have increased by 15.1%, but by 29.1% for imports between April 2022 and March 2023. With continued fighting in Ukraine and the Israel-Gaza conflict causing new disruption to trade through the Red Sea and Suez Canal UK food inflation risks worsening due to greater reliance on imports. This - and a broader increased reliance on imports including foodstuffs - has had a substantial influence on the farming sector. This will limit demand for locally-produced agricultural products, lowering farmer income and investment in agricultural infrastructure and technologies.

As stakeholders were swift to point out, dependence on imports also exposes the agricultural industry to global market shifts, currency risks, and trade policy changes, resulting in income volatility. Furthermore, it will reduce agricultural diversity and innovation. Thus, increasing domestic agricultural production and assisting local farmers through targeted policies and incentives is critical for sector resilience and sustainability.

Consequences for Surrey and the South East

Market uncertainty has had a profound impact on Surrey farmers, affecting various aspects of their operations. The uncertainty in the market has led to price volatility, making it difficult for Surrey farmers to plan and make informed decisions. Fluctuations in commodity prices, such as wheat and livestock, can significantly impact farmers' profitability and financial stability (BBC, 2022). Uncertainty in agricultural markets can arise from various sources, including weather conditions, changes in trade policies, and global events. For example, the recent Russia-Ukraine and Israel-Gaza conflicts have created turmoil in global food, agricultural, and input markets, leading to increased uncertainty.

Entrepreneurial farmers in Surrey have adapted by focusing on agritourism as a form of diversification measure. By opening farm shops, farmer's markets and agritourism venues, farmers can better engage with consumers, offer value-added products and create novel farm experiences.^{vii} Farmers can thereby bypass distribution channels provided by middlemen to engage more directly with their products' target market. Government support and financial assistance play a crucial role in facilitating diversification efforts. Subsidies and grants provided by the government help farmers offset the costs associated with diversifying their operations and adopting sustainable practices.

Surrey farmers have made efforts to grow the local market. Farm shops, agritourism attractions and 'buy local' campaigns are designed to encourage local people to eat more of Surrey's produce, thereby stimulating the local economy. The stronger ties between local farmers and consumers give the former political leverage over the latter, although significant barriers to a more satisfactory equilibrium remain. Food quality comes at a price, but assurance schemes such as Red Tractor,^{viii} Pasture for Life^{ix} and "The Trade Mark" - Surrey Hills Enterprises'^x membership brand - suggest that there is a growing consumer willingness, and ability, to pay that price.



The UK economy's substantial reliance on imports intersects with fair trade norms, particularly in terms of agricultural product sourcing. This reliance poses important considerations about ethical and sustainable production techniques, given the possibility of sourcing from locations with differing labour standards and environmental legislation. Such dynamics can heighten worries about unfair labour practices and environmental degradation linked with imported goods.

As a result, there is an urgent need to prioritise fair trade principles to ensure that imported items are ethically and sustainably produced, helping producers in developing countries while also addressing consumer aspirations for responsible sourcing practices. Embracing and supporting fair trade efforts not only solves the social and environmental challenges associated with import reliance, but also coincides with changing consumer expectations for ethically sourced goods.

This strategy is critical in promoting global sustainability goals and establishing a more equitable and responsible global trade framework. Creating fair and free markets requires a level playing field for UK farmers - the future international trade agreements negotiated by the UK need “levelling up” if they are to achieve fairness.



69%

of the UK's land area is farmed.



Agri-food sector jobs in 2022 were just under

4.2 MILLION

Part III: Labour

Context

The agricultural labour market in Surrey and the rest of the national agricultural industry has faced severe shortage and this has been compounded by the limited availability of labour due to Brexit and the COVID-19 pandemic. The labour shortage that impacted Surrey farmers are not bound to the county, but rather reflecting a wider national agricultural trend. In the UK, a report by the NFU (National Farmers Union) reveals that there is an 'agricultural labour year-round vacancy rate of 11 per cent in 2021'.^{xi}

Impact of Brexit and Covid 19

The departure of the United Kingdom from the European Union has changed the free movement of workers.^{xii} Previously, when labour was in short supply because of weather or market demand, many Surrey farmers would employ seasonal and migrant workers from the EU. Given the post-Brexit immigration legislation shift, workers are now subject to stricter rules and restrictions. This led to a decrease of labour supply, and farmers are now uncertain how much support they can receive. Additionally, the COVID-19 pandemic has added to Surrey farmers' labour market challenges. Travel restrictions and lockdowns prevented free movement of workers, making it difficult for farmers to source and retain seasonal and migrant employees. Farms have had to implement extra health and safety protocols and obtain proof of vaccinations and COVID testing to allow for farm workers to do their jobs.

Labour in the South East

There have been significant endeavours to diversify. Farmers have worked to 'attract a more diverse range of people from all walks of life, ethnic backgrounds and genders to choose a career in agriculture'.^{xiii} As research and stakeholder interviews demonstrated, there are a range of agricultural jobs including casual, part-time and full-time options. Figures provided by DEFRA in 2023 show that the South East (including Surrey) attracts more casual workers than the national average (29% within the region, compared to the new national average of 14%), indicating that seasonal labour is more evident here. Indirectly, this makes the county more vulnerable to volatility of the labour market.

The chart below compares the types of employment in the agricultural industry between the South East region (including Surrey) and the national average in 2022. It also shows the percentage of workers in each category: full-time, part-time, and casual. In the South East, 38% of agricultural workers were employed full-time, while the national average was slightly higher at 46%. In terms of part-time employment, the South-East had a lower percentage at 31% compared to the national average of 36%. However, the South East had a significantly higher percentage of casual workers at 25%, whereas the national average was only 14%. In 2023, the South West had the highest proportion of England's *total agricultural labour force* (22%) and accounted for the largest share of its regular workers (19%). However, the South East (including London) region had the highest numbers of workers *per farm* (3.6 workers) and the highest proportion of England's casual labour (29%).

Breakdown of work mode by percentage of total agricultural workers in the UK^{xiv}

Measure	South East (including London)	England	South East (including London) as % of England
Total labour	45,592	292,401	16%
Total labour per farm	3.6	2.9	[z]
Regular workers	11,471	64,583	18%
Regular workers per farm	0.9	0.6	[z]
Casual workers	10,868	37,027	29%
Casual workers per farm	0.9	0.4	[z]
% full time	39%	46%	[z]
% part time	32%	37%	[z]
% casual	24%	13%	[z]

Source: Defra, June Survey^{xv}

This and other data indicate that the South East relies more heavily on seasonal and casual labour compared to other regions in the country. Further information can be gleaned from the table below, indicating the significant reduction in the agricultural workforce that has occurred arising from changes to UK immigration law following the 2016 Brexit referendum, but taking material effect when the UK left the EU on 31 December 2020.

Labour Force in the South East and London in 2023 (number of people)

Labour fluctuations and indeed shortages have substantially impacted the sector's ability to harvest food crops, as in 2022. That year the NFU reported that £60 million worth of UK crops were left to rot because there were no workers to harvest the crops.^{xvi} Since the changes to post-Brexit immigration regulations, the labour force availability to workers out of the EU is limited. The new regulations are complex and harder for farmers to follow to get the necessary workers from EU countries as before.

Many of the seasonal and migrant workforce population who used to work for Surrey farms have found it more challenging to access work permits and visas, leading to a reduced workforce in the sector. The reduction in the agricultural workforce has serious implications for Surrey farmers as it means deployment of their activities will be delayed, crop losses are inevitable and productivity levels may be affected as some crops may not ripen to maturity before harvesting. Shipment and marketing tasks to gross margin and costing are affected which significantly increases labour cost as farmers compete with other farmers to get the few available workers.

Seasonal Agricultural Workers Scheme

The UK government recognises the labour market challenges faced by farmers (including in Surrey) and has introduced several initiatives that support a sustainable workforce for farming. The first initiative for addressing the labour market challenges for farmers is the Seasonal Agricultural Workers Scheme (SAWS).^{xvii} Subject to a national quota of visas to be issued by DEFRA, this allows farmers to bring citizens from non-UK countries to the UK for a specific period to work for them in exchange for remuneration. It gives an opportunity to foreign individuals to work on the farm and ensure that farmers have a workforce to carry out their work.

The government is working towards the improvement of the labour market conditions of workers in the agricultural sector. This includes the welfare of workers, remuneration provided to them, housing and other living requirements. The government has specific rules and regulations that need to be followed by farmers and workers to ensure that the rights of workers are not exploited in any way. Equally however, it is undeniable that the agricultural sector in Surrey is still affected by the combination of Brexit and the Covid 19 pandemic, and the ensuing travel restrictions and immigration changes that have resulted in a sustained lack of EU farm workers. Whilst recent increases to the national SAWS quota for 2024 are to be welcomed, it is important to emphasise the dissatisfaction of many farmers who feel that the quotas do not go far enough and who find it difficult and expensive to access labour through the Scheme.



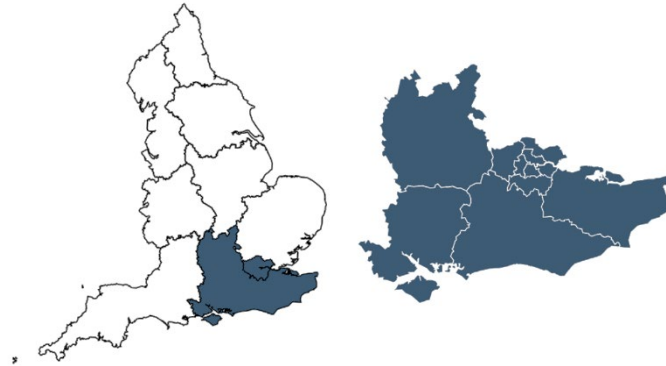
Part IV:

Costs and Subsidies

Context: UK Agricultural Output and Input costs between 2018 and 2022



English Regions



South East Region (including London)

Key statistics for England:

A snapshot of statistics at national level help set the stage for the various costs associated with agriculture, foreshadowing future discussion in the report on the need for fair value in the food supply chain.

- Total Income from Farming (TIFF)^{xviii} in England in 2022 was £5.7 billion. TIFF increased in all 8 of England's regions with an average increase of 15% between 2021 and 2022.
- The largest contributor to England's TIFF in 2022 was the East of England (19%) and the smallest contributor was the North East (4.5%).
- Total livestock output was the largest output^{xix} in 5 of England's 8 regions while total crop output was the largest in the other 3 regions including the South East and London.
- The North East had the largest average farm size in 2023 (145 hectares) while the West Midlands had the smallest (67 hectares). The average English farm size was 88 hectares.

Surrey Snapshots

Surrey farmers, like the national agricultural industry, are grappling with input costs. These refer to the sum total of the expenses that farmers face in producing food - for instance, fertiliser, seeds, machinery, labour, and so forth. These costs have been rising, which has squeezed the profitability and viability of what farmers produce.

In Surrey, the cost of land is high. This has a distinct upward effect on input cost costs. Surrey land prices are some of the highest in the country. Expansion by farmers is curtailed by prices for extra land and smaller farms which are more reliant on leased land suffer the price rises for rental as well.

Another factor causing squeezed input costs to Surrey farming is that imported products can have lower production costs than the equivalent products produced domestically. For example, imported products from countries that have either lower labour costs, high subsidies or lower regulatory standards are detrimental to UK farmers. Furthermore, following Brexit, UK farmers now no longer receive subsidies from EU's Common Agricultural Policies (CAP). With introduction to Environmental Land Management Schemes (ELMS), farmers are no paid on the based on the area of their farm but rather on contribution to sustainability alongside food production (Greer and Grant, 2023). Some farmers are reportedly getting less than 50% of their previous payment when the UK started phasing out CAP subsidies in 2021 (Financial Times, 2023; BBC, 2024). As a result, domestic farmers find themselves in a difficult position when competing with lower-cost foreign producers with high production costs. Therefore, farmers' profit margin is significantly reduced as a consequence of the competition from foreign products.

"Abuses within supply chain: farmers sometimes are their own worst enemy, don't act in a business manner; in Surrey for e.g., a large producers **have** no choice but to deal with a supermarket, as local farm shops won't take the volumes. So smaller farmer can group together in a cooperative structure for leverage & bargaining power in the supply chain; OR embrace the local/regional provenance-based sale and not produce simply as much as possible but as much of **value** as possible."

Jonathan Lodge, 2024

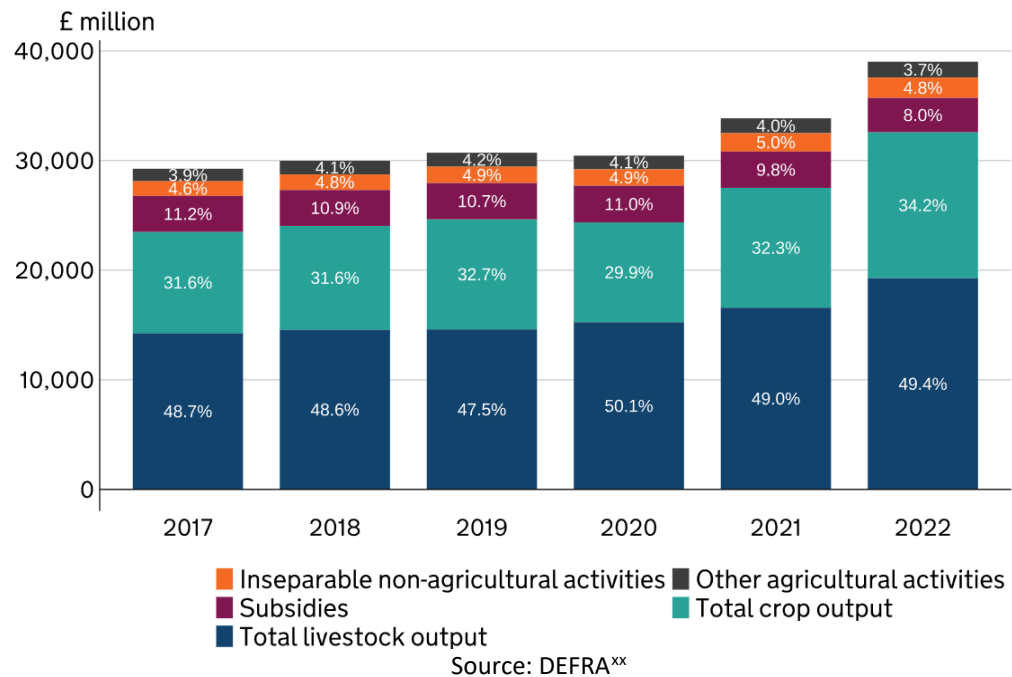


Government Subsidies and Support

The government has launched several schemes to assist farmers in the management of their energy costs. As part of the Energy Efficiency Scheme, funding and advice for improved energy efficiency and reduced energy consumption on the farm are provided to farmers, enabling lower energy bills and reduced input expenditure.

Additionally, the Farming Investment Fund is one of the most important schemes to tackle the increasing cost of inputs. This funding would help to support farmers to invest in new technologies, equipment and infrastructure needed to improve their productivity and efficiency. The government endeavours to manage the high input costs by providing farmers with financial incentives to upgrade their current equipment and adopt new technologies and best practices, e.g. crop nutrition, pest monitoring and management, and soil health.

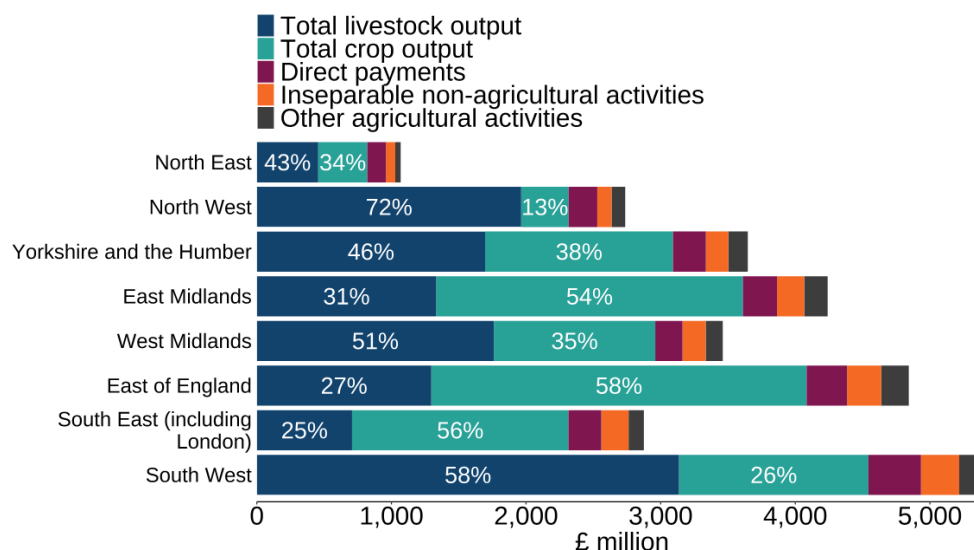
National Farm Output and Subsidy Percentages 2017-2022 (£ million)



The period covered by the above graph begins with the aftermath of the Brexit referendum and extends through the transition phase that led to the UK’s final departure on 31 December 2020. While the years 2017 to 2020 are broadly similar in their overall component percentages it is important to note that the total outputs in 2021 and 2022 reflect the removal of EU subsidies with the year-on-year increases in total crop output providing a significant compensatory counter-balance.

This narrative is carried forward in the following graph, which details the English regional agricultural outputs and subsidies in 2022, with the South East (including London) showing the third largest regional percentage for total crop outputs (behind East of England and East Midlands).

Regional Agricultural Outputs and Subsidies in 2022 (£ million)

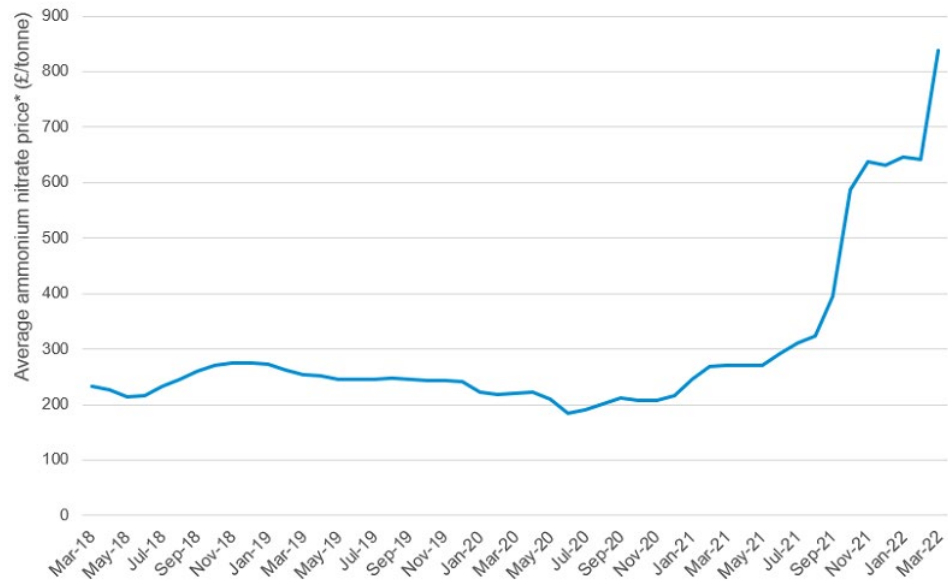


Beyond the Farming Investment Fund, the UK government has also been taking steps to reduce high fertiliser costs for agriculture. The Sustainable Farming Incentive, which is part of the new Environmental Land Management Scheme (ELMS), rewards farmers for using sustainable farming practices, including how they use nutrients. Encouraging farmers to use fertiliser in a more efficient and targeted way will help farmers reduce their input costs and lower their environmental impact. The Government continues to refine its ELMS subsidiary programmes - which include Countryside Stewardship and Landscape Recovery as well as the Sustainable Farming Incentive - in the hope that by 2028 at least 70% of farmers will enrolled in one of them. As with the Seasonal Agricultural Workers Scheme, farmers will be keen to see increased support from Government if ELMS is to maximise its potential.^{xxi}

Input costs in the agricultural industry varied to some extent in the past depending on the prices of agricultural commodities, weather conditions, and the trends of the global markets. According to the annual Farm Business Survey, the average of total variable costs paid per hectare for cereal farms in England in 2019/2020 was £691.^{xxii} This is the sum of the prices of seeds, fertilisers, crop protection, and machinery operation. Similarly, for general cropping farms in England the average of total variable costs was £518 per hectare in the same period.

Moreover, as data from the Agriculture and Horticulture Development Board (AHDB) shows, farm input costs – including fertilisers, energy and feed – have been volatile in the past years. For example, the average cost of nitrogen fertiliser increased by 38% between 2016 and 2020; the average cost of diesel also went up by 19% during the same time period.^{xxiii}

Trends in imported ammonium nitrate (AN) prices



Source: Agriculture and Horticulture Development Board (AHDB)

Input costs can differ however, depending on the farm enterprise, geographical location, and individual farm circumstances, hence traditional efforts by the government to support farmers with this and other milestones to reduce input costs. Investing and engaging with technology with the aim of increasing resource-use efficiency, promoting sustainable production, minimising farm emissions, and managing waste which are among the measures by the government to help make farming in the UK, economically viable and sustainable.



Part V: Farming as a Business

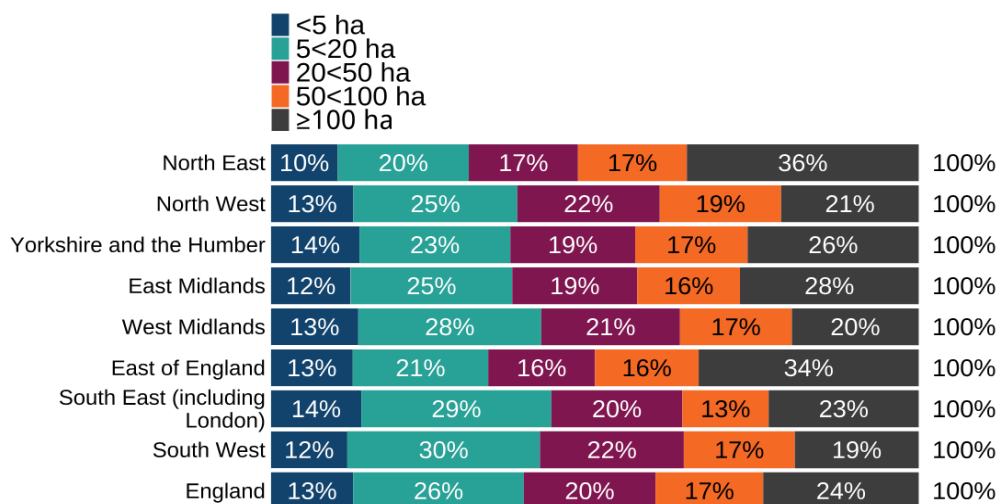
Surrey farmers have demonstrated resilience, ability and adaptability to the challenges and market changes in recent years. Agriculture in the south-east contributes significantly to the national economy: the total amount of income from farms in England is £3.6 billion per year, and the total net contribution from the agriculture of England to the UK economy is £7.6 billion.^{xxiv} The latest available DEFRA data (April 2024) covering the South East (including London) across all farm types, shows average Farm Business Income was £102,700 per farm in 2022/23, an increase of 25% from 2021/22.^{xxv} Much of this increase was due to the expansion of cereals and horticultural products, apparently at the expense of livestock grazing.

The agricultural business in the South East as a whole demonstrates an upward trend. Between 2018 and 2021, the agriculture-based income in Surrey increased by 78 per cent, higher than the national agricultural average of 65 per cent in the same period.^{xxvi}

Farm Types

In England, the predominant farm types in 2023 were grazing livestock (41% of England's holdings) and general cropping (21% of England's holdings) farms. Nevertheless, the prevalence of different farm types can vary considerably across England's regions. For example, 37% of holdings in the East of England were cereal farms while only 4.5% of holdings were cereal farms in the North West. In the South East (including London) 56% of total outputs were crops while total crop outputs were 27%. Across all farm types, average Farm Business Income (FBI)^{xxvii} in England increased by 12% between 2021/22 and 2022/23 and was £96,100 per farm. The North East had the highest average FBI (£193,600 per farm) while the South West had the lowest (£62,800 per farm). Information in the following two tables illustrates 2023 data on the distribution of farms in England by size, and again by type.

Distribution of farms in England by size in 2023 (percentage of farm holdings)

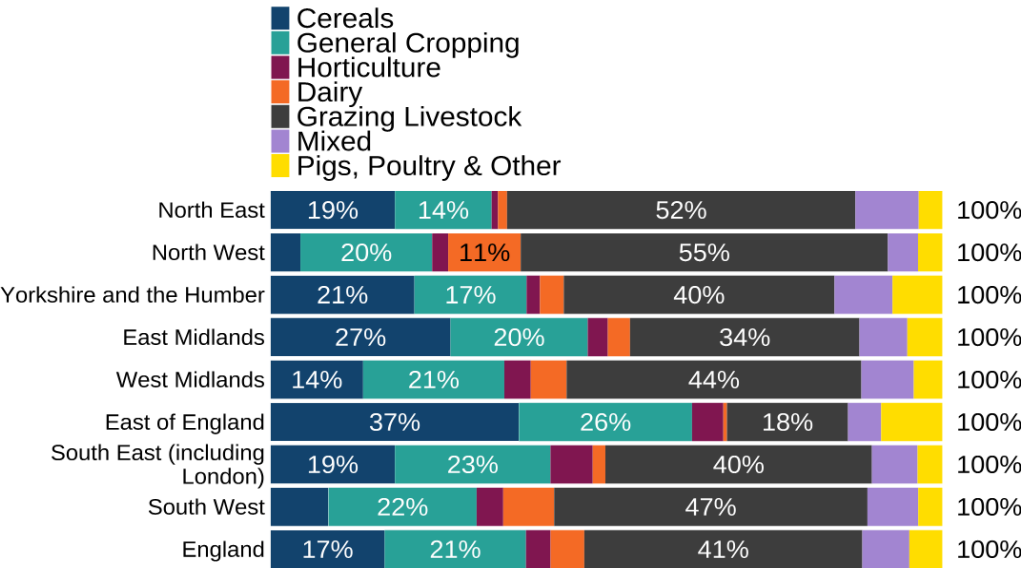


In terms of the types of farms in Surrey, there is a diverse range of agricultural activities. Small farms, with a size of around 20 hectares, reflect the agricultural history of the county. These farms have often diversified into farm shops, farmers markets, agritourism, and educational programs. They also engage in value-added programs such as production of jams, chutneys, and baked goods. Events and festivals, farm-to-table dinners, and direct sales to consumers are also common among small farms in Surrey.

Commercial Farming

Prevalent in Surrey, with farms specialising in crop production, livestock farming, and diversified enterprises. These farms often leverage technology and innovation to optimise their operations. They may specialise in high-value crops and cater to niche markets or produce organic and artisanal products. Some commercial farms in Surrey offer pick-your-own experiences, operate farm shops, or supply fresh produce to local markets and cafes.

Distribution of farms in England by type in 2023 (percentage of farm holdings)



Estate farming is another type of farming found in Surrey, with historic estates supporting various agricultural activities. These farms often engage in crop production, livestock farming, forestry, and other farming practices. In addition to their agricultural operations, they may have gardens, historic buildings, and recreational activities. Some estate farms in Surrey focus on sustainable farming practices, while others have vineyards, orchards, and gardens.

Rented Land

Based on the Agricultural Census statistics (AUK Evidence Pack, 2021), 64% of farms in Surrey are owner-occupied whereas 36% of farms in Surrey are rented farms. The national average for rented farms is only 28%, whereas the figure in Surrey makes a higher percentage. This shows a higher number of rented farms in Surrey and the southeast region. Surrey's agricultural industry may be characterised by smaller-scale farms that contribute positively both to the local and national economy.

Over the years, Surrey's farmers have adapted themselves to modern trends and introduced various agriculture-related businesses to actualise them. As a result, Surrey has one of the largest diversified farm wineries in the UK, also specialising in high-value products, such as organic vegetables, meat and wine. In conclusion, it may be said that the agriculture industry of Surrey contributes to the local and national economy impressively even though the scale of farms tends to be smaller. Surrey's farmers have adapted to new trends and introduced business to achieve them while also making the industry more environmentally friendly.

Agricultural Land Use in the South East (including London) during 2023 shows that the region is on a par nationally in terms of total farmed area (12.2%) and average farm size (88 hectares), with a greater percentage of land (56%) devoted to Arable crops in the South East compared to 53% nationally (further information is found in Table 1 in the Annexes).

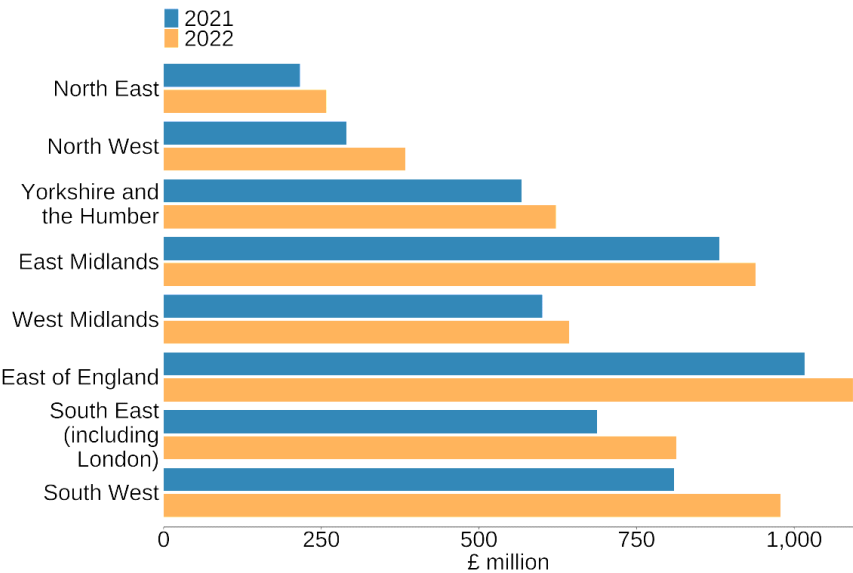
The main crops grown in the South East region are wheat, barley and oilseed rape. Orchards have traditionally been a strength in Kent but UK apples generally - whether for eating or for cider production - are under increasing pressure from imported varieties. In Surrey, orchards have never used much land but west Surrey is seeing significant investment in the market for small fruits, reflecting opportunities that have come with the modern milder climate and the potentially greater business returns that this type of crop has over the traditional arable crops formerly on this land. (Table 2 in Annexes).

Livestock numbers reflect the importance of beef cattle over the dairy herds that were far more prevalent in the twentieth century. In Surrey, the main consumer beef breeds are Aberdeen Angus and Herefords; an increasingly common sight are the distinctive Belted Galloways - also used for meat but popular for grazing as part of habitat regeneration schemes to support biodiversity, especially in Surrey's heathland areas. The county also has a surprisingly diverse range of habitats within its boundaries, including downland, woodland and grazing land in addition to the arable land previously mentioned.

Income From Farming

As can be seen in the DEFRA Farm Business Survey graphs below, the South East region (including London) performed strongly in 2021 and 2022, ranking it fourth behind the East of England, East Midlands and South West in terms of income generated. The increase in the South East’s income from Cereals may reflect the particularly good hot weather harvest of 2022.

Total income from Farming (TIFF) in 2021 and 2022 (£ million)



Average Farm Business Income in the South East and London in 2021/22 and 2022/23 (£ per farm)

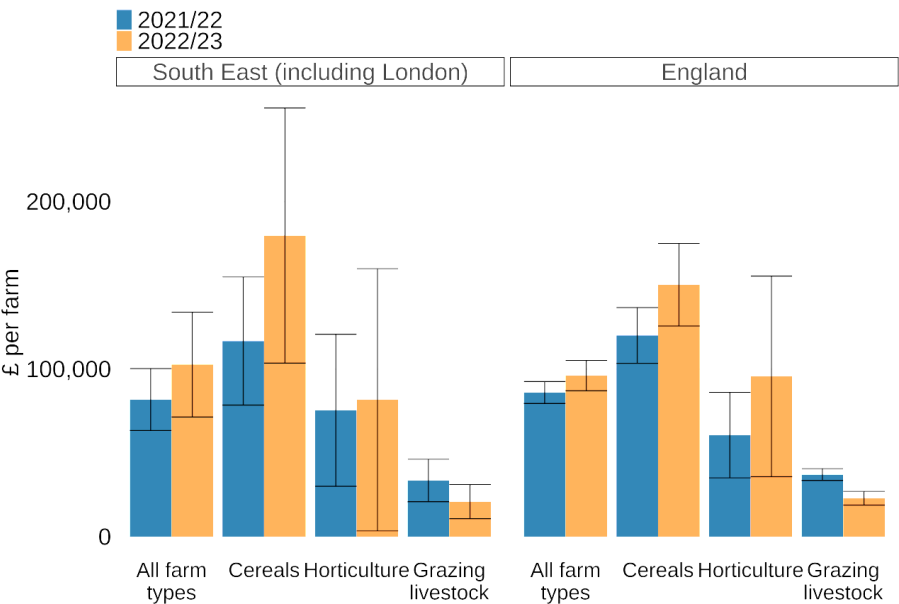


Table comparing Average Farm Business Income in the South East and London in 2021/22 and 2022/23 (£ per farm):

Farm type	South East (including London)	England
All farm types (2022/23)	102,700 (±31,300)	96,100 (±9,000)
Cereals (2022/23)	179,700 (±76,100)	150,400 (±24,700)
Horticulture (2022/23)	81,700 (±78,300)	95,600 (±59,800)
Grazing livestock (2022/23)	20,900 (±10,200)	22,900 (±4,100)
All farm types (2021/22)	81,800 (±18,500)	86,100 (±6,600)
Cereals (2021/22)	116,800 (±38,200)	120,100 (±16,600)
Horticulture (2021/22)	75,400 (±45,300)	60,600 (±25,500)
Grazing livestock (2021/22)	33,500 (±12,700)	37,100 (±3,500)

Source: DEFRA, Farm Business Survey^{xxviii}

High Value and Specialism Opportunities

In an effort to counter the input squeeze, Surrey farmers began to produce high-value agricultural products that are characterised by their uniqueness, quality or niche appeal.^{xxix} Some of these niche products include organic fruits and vegetables grown by farmers in Surrey ranging from carrots and cauliflower to strawberries and apples. Health-conscious consumers seeking healthier dietary choices are increasingly willing to pay a premium for organic fruits and vegetables. Similar to direct marketing, by specialising in high-value crops Surrey farmers are able to garner more profits on a per-unit basis and recover more of their higher input costs.

Other value-added products can be seen in artisanal or specialty food products such as specialty cheeses, homemade berry jams, or other baked goods, as a way to differentiate themselves and their products from the competition. Value-added products tend to have much larger profit margins than raw agricultural commodities, offering the farmer an opportunity to sell more to maintain revenue, and mitigate against the relatively squeezed margins for raw inputs. Indeed, as various stakeholder interviews confirmed, direct-to-consumer sales have been especially effective for Surrey farmers given their proximity to urban markets and consumers. These farmers have been able to avoid trusted distribution channels and capture a higher share of the retail price through their farm shops, farmers' markets and online sales.

At a national level, Surrey's switch to high-value products is merely indicative of a wider trend. As a response to the twin pressures of squeezed input costs and fluctuating seasonality, across the country, a large proportion of farmers have diversified their businesses and entered the high-value product market to earn better margins. For many farmers, especially food producers, high-value production has become a matter of survival. A number of organisations have made this point. The NFU for example argues that for farmers in the South East keen to stay ahead of market changes, the key is to "prioritise investment in products where demand is expected to grow, or where the region has particular advantages, such as the large growth potential in viticulture, growing demand for fruit, ornamentals, other glasshouse crops and naturally-grazed meat and dairy products."^{xxx} This, along with a marketized approach to the provenance of goods on the one hand, and their role in sustainable farming on the other, suggests modes whereby farmers can ally themselves with consumer choice whilst pushing hard for fair value on their own terms.



Part VI:

Access to Market

Farmers play a crucial role in managing three-quarters of British land, making their involvement and economic viability vital for the urgent transition to agri-ecological practices needed to combat the climate and nature emergency. However, many farmers face significant obstacles in adopting new practices, diversifying crops, enhancing soil carbon, and reducing environmental impacts due to the minimal economic returns they receive for their produce.

In the current supply chain dynamics, farmers find themselves at a disadvantage compared to large food industry buyers who wield significant bargaining power. As a result, farmers are increasingly squeezed financially and subjected to unfavourable contractual terms, with their costs minimised over the years. The supply chain inefficiencies exacerbate this issue, with substantial value lost in processing, storage, transport, and profits beyond the farm gate. The unsustainable nature of this system is evident, especially as retailers struggle in an intensely competitive market. With the looming threats of climate change exacerbating food supply risks, urgent action is needed to address these systemic flaws.

It is imperative to examine and reduce costs extracted downstream in the supply chain. Additionally, further investigation into the long-term financial sustainability of maintaining constant on-shelf availability is necessary, considering its implications for the overall food system. Collaboration with the government is essential to maximise production potential and secure a stable food supply for all. Moreover, fairness in the supply chain is paramount, with farmers deserving equitable compensation for their contributions. As emphasised by former MI5 head Baroness Manningham-Buller, ensuring long-term food security demands regular assessment of the entire food sector and proactive measures to address emerging issues.^{xxxix}

Loss-leader Strategy and Favouring Cheaper Imports

The government is facing two separate but related issues that can be addressed as a joint effort to yield positive outcomes. The first relates to the report that 49% of British fruit and vegetable farmers are at risk of bankruptcy within the next 12 months.^{xxxix} The other concerns a decreased fruit and vegetable consumption among the majority of British citizens, particularly children.^{xxxix} The rise of living costs has certainly contributed to higher consumption of unhealthy foods. For example, families who are facing financial difficulties may be met with a choice to either feed their family with a large packet of biscuits at a lower cost versus a small pack of apples at higher cost.^{xxxix} Furthermore, supermarkets are favouring cheaper imported products to homegrown. Both challenges are also felt severely by our farmers at home.

Growers have witnessed wage and input inflation surpassing the inflation rate outlined in retail contracts, particularly affecting crops requiring energy-intensive storage, such as apples and onions.^{xxxix} In a well-functioning market, growers would anticipate receiving higher returns to accommodate this inflation. Similarly, market dynamics would dictate price increases during periods of produce scarcity and decreases when supply is abundant. Historically, many UK horticultural businesses relied on occasional years of favourable weather or supply shortages to generate surplus income, which serves as a buffer during lean years.



However, the current landscape reveals a stark departure from this norm, with UK retailers operating on fixed, notably low-margin contract prices for fresh produce, regardless of prevailing market conditions. Consequently, the compensation received by growers no longer reflects market realities, leading to a significant imbalance in the risk-reward equation heavily weighted against growers. As a result, many are opting to exit the industry, as evidenced by recent developments such as the departure of the UK's largest turnip grower and anticipated reductions in onion cultivation area for 2023, alongside a growing trend of dessert apple orchards being removed without replacement.^{xxxvi}

Unhealthy Foods

A coalition of experts, including doctors, scientists, health charities, and food campaigners, have penned a letter to the Chancellor, Jeremy Hunt (currently a Surrey MP), emphasising the significant impact of poor health on the economy. They highlight how unhealthy food choices, alcohol, and tobacco contribute to high rates of preventable diseases in the UK, such as type 2 diabetes, cancers, and heart disease. The letter underscores the economic burden of these health issues, estimated at £98 billion annually, and calls for a shift in public health strategy, viewing interventions as investments rather than costs.¹ Recommendations include expanding taxes on sugary drinks and high-salt foods, banning junk food advertising before the watershed, and reducing children's exposure to unhealthy food marketing. The experts urged the Chancellor to prioritise prevention in the Spring Budget and gather evidence on policies to promote healthier lifestyles, citing potential economic gains and public support for government action.¹

While policies aimed at curbing unhealthy lifestyles, such as excessive consumption of low-nutritional foods, could potentially mitigate prevalent health issues in the UK, the government could adopt a proactive approach. By implementing affirmative policies that promote healthy eating habits, the government could effectively curb the escalating trend of health issues stemming from unhealthy lifestyles. Moreover, such policies would also provide support to domestic farmers, thereby fostering a healthier populace while bolstering the agricultural sector.

Contract Uncertainties and Transparency from Supermarkets

Retailer contracts are often single year, omit inflation clauses and do not provide partnership approach that growers require to invest in long term crops. To plant an orchard in the winter of 2022/23, the grower would have ordered trees in 2020 and, once planted, the trees would not come into full production until 2027/28. The risks associated with the current “cheapest price” approach do not give growers the confidence and certainty required to make such long-term investments.^{xxxvii}

Contractual Conundrum

Some supermarkets and their buyers are accused of not paying on time, pursuing cheaper food alternatives from overseas, and cancelling or changing orders at the last minute. Farmers also lamented that fruit and vegetable specifications by these buyers are difficult to meet. Three quarters (75%) surveyed say the behaviour of supermarkets is a leading concern within the industry. According to the research, one in five farmers (22%) say they have suffered wasted crop due to cancelled orders from supermarkets, 29% have also received a cancelled order from supermarkets with no explanation and just under a third (29%) have seen supermarkets failing to pay them within 30 days. However, 70% of farmers surveyed agreed it would have a positive impact if buyers paid the amount initially agreed and did not then slash prices after the initial agreement. A further 64% agreed it would have a positive impact if buyers bought everything they committed to buy.¹

Furthermore, many farmers that sell to supermarkets are wary of speaking out, fearful it could impact their livelihoods. As one potato grower, who agreed to speak to Sky News anonymously, explained how he lost thousands of pounds after a major UK supermarket cancelled 60 tonnes of salad potatoes upon harvest.^{xxxviii} This farmer stated, "it came to harvest time and we got the potatoes out of the ground, harvested them and at that point we got informed they'd been delisted - meaning they weren't on the variety list that the supermarket wanted to take any longer," they said. He also said the quality inspections of produce could have discrepancies - claiming that if there's a glut of a certain product then the smallest of issue will mean produce is rejected, but if it were in high demand, the same blemish would pass.^{xxxix}

Equally, Andrew Opie, director of food and sustainability at the British Retail Consortium (BRC) - which represents supermarkets – argues that against the idea that retailers fail to provide long-term financial security to farmers. “Supermarkets have very, very long-standing relationships with their direct suppliers,” he said. “It may be that the farmers don't always have a contract with the supermarket directly because they may go through a middleman”.^{xl}

The primary concern lies in the disparity between the perceptions of farmers and supermarkets regarding their relationships. Many farmers assert that supermarkets have engaged in unacceptable behaviour, particularly citing breaches of contracts. In contrast, supermarkets contend that they maintain positive relationships with their farmers. This disparity highlights the need to devise suitable recommendations for governmental intervention to address these issues effectively.

Working with Organisations that Promote Local Sourcing

Local sourcing can be a transformative force for growers and producers, empowering them to thrive in their communities and contribute to a sustainable future for their regions. Organisations like Hampshire Fare, Surrey Hills Enterprises and Produced in Kent exemplify the power of local sourcing initiatives, championing the cause of local producers and businesses with unwavering dedication.

Hampshire Fare, an esteemed not-for-profit group, works tirelessly to elevate Hampshire's food, drink, and craft industries. With nearly 400 members, including producers and hospitality businesses, Hampshire Fare fosters a community committed to sourcing local and supporting sustainability. By championing local products, raising awareness, and providing essential support services, Hampshire Fare empowers its members to thrive in a competitive market while contributing to the county's economic and environmental well-being.



Surrey Hills Enterprises has developed its own quality brand The Trade Mark for its wide variety of member businesses, many of which are farmers and producers. Joint marketing by Surrey's five vineyards attracts other local businesses with complementary product offers so The Trade Mark is a collaborative and unifying brand to help the Surrey economy. Surrey Hills Enterprises organise or support various promotional events and festivals at larger rural venues and town centre street festivals.

Similarly, Produced in Kent stands as a beacon for local sourcing in the Garden of England. With a vision to establish Kent as a sustainable hub for fine local produce, Produced in Kent provides invaluable support to its members through branding, marketing, and business development initiatives. By forging partnerships with industry stakeholders and collaborating with strategic partners like Visit Kent and Kent County Council, Produced in Kent amplifies the voices of local producers and fosters a vibrant local food culture.

Through initiatives like Kent Food Trails and the Taste of Kent Awards, Produced in Kent celebrates the rich tapestry of Kent's food and drink heritage, inviting visitors to explore the region's culinary delights while supporting local businesses. By working in partnership with Kent County Council and other stakeholders, Produced in Kent has become a self-sustaining force for local economic development, demonstrating the profound impact of local sourcing on regional prosperity.

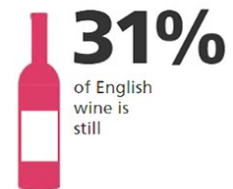
**14,000
hectares**

of vines will be planted
in the South East
between now and 2040



400%

The area of vines in the UK
has grown 400% since 2000



31%

of English
wine is
still



69%

of English
wine is
sparkling

Shortening The Food Supply Chain and Converting Farm Produce into Added Value Goods



Farmers hold the key to unlocking greater profitability and market leverage by reimagining their approach to the food supply chain. Martin Collison, of Collison & Associates Ltd, emphasises this potential, noting that a shift towards value-driven strategies can yield substantial profits. For instance, he highlights how some farmers in the 1990s were able to achieve remarkable markups by converting their produce into added value goods, such as transforming pigs into lucrative hog roasts, resulting in tenfold increases in profitability.

The significance of short food chains and localised arrangements in sustaining supply chains is widely acknowledged. Many members of the National Farmers Union (NFU) are already pioneering innovative methods to deliver food directly to consumers. In the South-East, with its affluent population and robust supply chain infrastructure linking to the UK's largest food market in London, the stage is set for farmers to capitalise on this trend).

The region boasts a diverse array of producers, from fruit and vegetable growers to producers of sustainable beef and lamb, high-value dairy products, and premium grains. By embracing supply chains with fewer intermediaries, South-East farmers can capture additional value from the food chain, ensuring that more returns flow back to the producer.

Moreover, as consumer preferences increasingly prioritise the provenance and traceability of their food, South-East farmers are uniquely positioned to support a vibrant and distinctive food economy. Leveraging the

region's rich food heritage and culture, farmers and growers can cater to the evolving demands of consumers, fostering innovation and differentiation in the marketplace.^{xli}

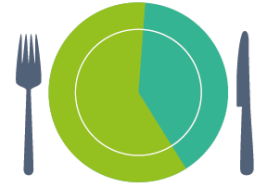
In essence, by shortening the food supply chain and adding value to their products, South-East farmers and growers have the opportunity to not only enhance their profitability but also to cultivate stronger connections with consumers, solidifying their position as key players in the evolving food landscape.

Part VII: Sustainability



UK food self
sufficiency is
currently (2022) at

60%



Amount UK shoppers spent on food and
drink products in 2022 was

£281 BILLION

Farmers produce
renewable energy
that helps to power
an average of

**10 MILLION
UK HOMES**



The government has been putting emphasis on environmental sustainability in farming. This is seen in the changing government funding regime for agriculture - with the EU's CAP schemes now being replaced by the UK's Environmental Land Management Scheme (ELMS), farmers will be paid for the public goods they provide instead of for the amount of land they farm. More funding is expected to help farmers add value, engage with consumers and develop their supply chain.

The focus of ELMS on countryside stewardship and landscape recovery has been perceived by some as an incentive to take land used for growing food out of production for environmental purposes. Most farmers and landowners do not want this outcome, which helps neither future food security nor farmer welfare - they want to be producing food.

The ideal goal should be regenerative farming - focusing on producing food while at the same time benefiting the environment. According to Waitrose in its *Weekend* news sheet last September the trend for regenerative farming is gathering momentum, including at its farm in Leckford, Hampshire.^{xliii} The company emphasises that Waitrose and its farmers share the same ambitions, which include reaching a net-zero target for Greenhouse Gas emissions by 2035.

To allow for growth, DEFRA has turned to enabling access to farming in some of the protected landscapes. For example, the Farming in Protected Surrey landscape (FiPL),^{xliii} which runs until March 2025, allows for farming at Areas of Outstanding Natural Beauty (AONBs) in Surrey,^{xliiv} a part of DEFRA's

agricultural plan 2021-24.^{xlv} Grants fund projects for farmers and land managers via Surrey Hills Trust^{xlvi} to support nature recovery, mitigate the impacts of climate change, provide opportunities for people to discover, enjoy and understand the landscape and its cultural heritage, protect or improve the quality and character of the landscape or place.

University of Lincoln's Visiting Professor Martin Collison notes that the businesses still need to cover their costs above everything else. Failing to do so leads to inability to invest in their workforce, sustainability and climate change, productivity growth or improved food choices. Additionally, there has also been conflicting views on priorities of the use of land:

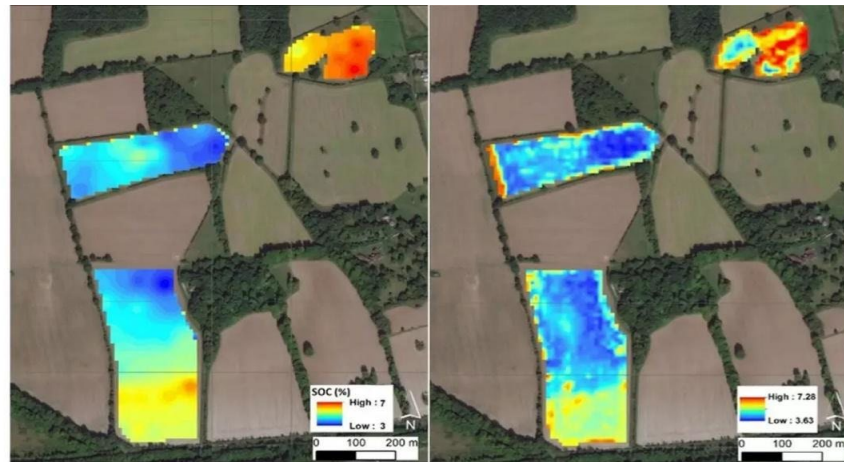
"...government at every level doesn't value food production but rather everything else that can be done with the land. Farmers believe that core function is to produce food, NFU in UK in particular; sense that policy direction is NOT completely correct.."

Martin Collison, Collison & Associates Ltd, 2024

The Government has recently agreed to update ELMS so that only 25% of land can be put into environmental schemes - although this does not apply to land where food is being produced alongside cover crops being employed for environmental gain. Sustainable farming is also challenging given its association with high costs. To get government support based on environmental impact, farmers need to show that they are indeed making changes, e.g. through measurement of organic carbon on the surface of soil over time. Traditional sampling in labs is often tedious and expensive and the adoption of new technology is still relatively sparse. Although many higher education institutions, including the University of Surrey, are often able to provide such access at a relatively lower cost. As an example, the use of remote sensing for sampling as researched by the University of Surrey showed a similarly close result as traditional soil sampling methods.



Soil sampling (left) vs remote sensing (right), shows similar mapping of carbon content



Source: University of Surrey^{xlvii}

The ideal outcome of course is one of balance, and possibly compromise. The South East has both challenges and opportunities in terms of its biodiversity and sustainability options. Representing the UK's most densely populated region, the South East is a commuter belt to financial, commercial and aviation-based hubs around its area, and incorporates its own range of high value business clusters, many directly connected to agriculture and the rural economy, including foodservice, hospitality, tourism, and catering. This makes the region both central to the visitor economy but also a steward of its famed diverse and protected landscapes, including its six AONBs. The region needs to balance dense population centres on the one hand and its successful farming of roughly 58% of the land on the other, balancing biodiversity, woodland cover and sustainability requirements with food security and commercial viability. In addition – following the overall theme of this report – fair value needs to be built into the food chain, rendering it both commercially viable, and greener overall. Analysis above points to increased use of key regional specialisms for the South East and Surrey in key areas. Logistically however, a dramatically shortened food chain is likely to address both fair value and local sustainability requirements.

The South East “has a large affluent population with well-established supply chain structures, which extend into the UK’s largest food market in London. There is potential to create additional value for the region’s farmers and growers through the creation of food chains which have fewer steps from producer to consumer, allowing more value to be returned to the producer.”¹

Policy suggestions below further emphasize the need to support farmers’ commitments to reducing their GHG and carbon footprints by reducing the thicket of carbon calculations, national targets, local goals, by standardising a simple, easy to use carbon calculator. The government needs now to support farmers’ net zero endeavours whilst ensuring the cost of required sustainability alterations and ongoing market pressures does not become prohibitive overall.

Policy Suggestions for Enhancing Fair Value in the Surrey Supply Chain

Policy suggestions in this section are based on CBE's analysis of the agricultural industry and input from business leaders and policymakers. This report has examined a number of key facets of farming, agriculture, rural enterprise and their various contributions to food security. A number of key conclusions can be drawn at this point.

First, an acknowledgement of agriculture's multifaceted role between food security requirements, market pressures and sustainability targets. This places the sector and its related areas of activity as a vital part of the UK's overall security, prosperity and climate adaptability.

Second, the strength of localism. Whilst there are a number of stand-out performers, the sheer variety of farm types, agricultural outputs and connections to rural enterprise more broadly in the South East and Surrey should make it a natural engine for growth opportunities, niche-based specialisms, and the benefits of provenance and traceability (via improved marketing whilst remaining pro-local).

Finally, the need to regard fair value as a positive to be pursued and accrued, not a negative to be wanted. As many interviewed stakeholders made clear, and as many representative organisations in the industry emphasised: "Fairness in the supply chain is a vital part of this. Farmers and growers cannot be expected to continue shouldering a disproportionate amount of the cost risk while the amount they receive for the food they produce is continually squeezed."^{xlviii} For that reason, this report supports the call for enhanced standardising approaches, not to add burdensome regulation, but rather to highlight the critical role played by food by indexing it annually, monitoring challenges and opportunities to overall domestic food production levels, and ensuring that farmers are recognised and indeed prioritised for the vital role they play in fairer value food chain: in Surrey, and beyond.

£ MANAGING COSTS

- Regulating prices and strategies in fruits and vegetables by banning loss leader strategies on homegrown fruits and vegetables.
- Lowering costs and encouraging healthy meals at school and supporting domestic farmers.
- Build direct relationships between schools and local farmers to produce lower cost healthy meals at schools.
- Government to match payment to the levels received through the CAP before Brexit.
- Collaborate with higher education or research institutions to better manage in areas where technological advances in crop and soil management to reduce long-term costs.
- Encourage farmers to shift their focus from quantity to value by seeking ways to add value to their produce through creative packaging and by promoting direct sales channels to consumers; also through collaboration with other farmers, and producers to develop value-added products and marketing strategies.



IMPROVING CHANNELS TO MARKET

- Implement measures to improve transparency in contractual relationships, such as requiring supermarkets to provide detailed information about pricing, order commitments, and payment terms to their suppliers. This could help farmers make more informed decisions and better anticipate potential risks.
- **Mandatory Contract Standards:** Introduce regulations mandating certain standards for retailer-farmer contracts, including provisions for longer contract durations, inflation clauses, and clear dispute resolution mechanisms. These standards should prioritise fairness, transparency, and predictability for both parties.
- **Enforcement Mechanisms:** Establish robust enforcement mechanisms to ensure that supermarkets adhere to contractual obligations, including timely payments and honouring agreed-upon terms. This may involve strengthening regulatory oversight and imposing hefty penalties for non-compliance through a simplified process.
- Provide support for Innovation through financial incentives, grants, or training programs to support farmers in adopting innovative techniques, technologies, and marketing approaches that add value to their products and improve competitiveness in the marketplace.



PROMOTE LOCAL SOURCING

- Partner with organisations like Hampshire Fare, Surrey Hills Enterprises' The Trade Mark and Produced in Kent to leverage their expertise, resources, networks and promote local sourcing initiatives.
- Engaging in Community Networking by participating in events, campaigns, and initiatives organised to showcase products, engage with consumers, and strengthen relationships within the community.
- Utilise Branding and Marketing Support provided by organisations like Produced in Kent to enhance visibility and recognition for locally sourced products and seek out local sourcing opportunities for business development and growth to achieve access to new markets, funding opportunities, and training programs.



FARMING SUSTAINABLY

- **Embrace Sustainability Practices:** Align with the sustainability goals and initiatives of local sourcing organisations to promote environmentally friendly and socially responsible farming and production practices.



SHORTENING THE FOOD SUPPLY CHAIN

- Ensure a supportive pro-growth food chain policy prioritising UK production and sustainability, with a level playing field for UK producers on costs and policy requirements.
- Support collaboration in the food chain, through policy and funding (e.g. support for Producer Organisations, collaborative R&D, supply chain development).
- Support productivity growth so food chain businesses can: make the profits needed to invest in the future; pay their suppliers fairly; and, pay wages and salaries which attract UK workers.
- Advocate for the development of efficient and streamlined supply chain models that minimise the number of intermediaries between producers and consumers, allowing farmers to retain a larger share of the profits, leveraging the unique characteristics of their region's food heritage and culture to create distinctive products that meet consumer preferences for provenance and traceability.



ENHANCED INVESTMENT

- Investment in production - create the UK a “Go To” destination for food chain investment, for UK and international businesses – this will create demand for our farmers and food chain SMEs.
- Simplify planning and improve infrastructure (e.g. energy, water and digital) to create world class facilities - e.g. Salmon farm in Grimsby, Magnavale Easton cold storage in Grantham, SmartParc SEGRO in Derby.



IMPROVED PARTNERSHIP AND GOVERNANCE

- The publicly available and up-to-date information referenced in this report should now be supplemented with new qualitative data on perceptions of Fair Value among farmers and producers in Surrey and the South East, to provide more detailed local analysis.
- Enhanced collaboration with and between key actors in the farming ecosystem (e.g. RPG, NFU, CLA and others) will add important weight in gaining UK Government support.
- Enhanced standardisation, including “a new food security index”, a clarified “statutory duty to monitor and report on domestic food production levels”, government-sponsored ‘food security report’, and an expanded role for the Groceries Code Adjudicator.^{xlix}
- Advocate for supportive policies and regulations at the local and regional levels that promote and incentivise local sourcing practices, ensuring a conducive environment for growers and producers to thrive.

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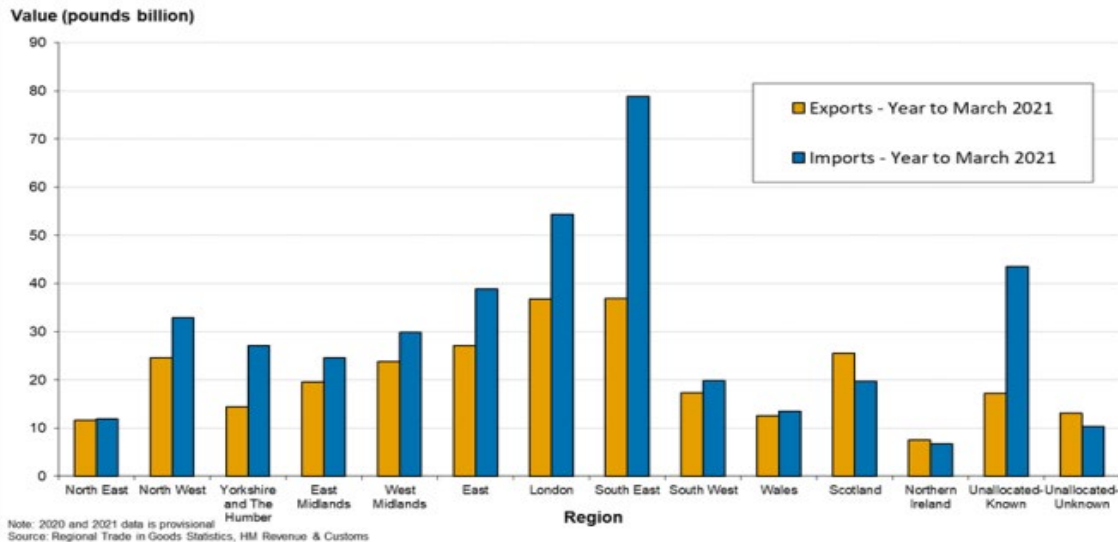
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Annexes

Figure 1: UK Imports and Exports by Region, year to March 2021 UK Regional Trade in Goods Statistics Quarter 1, 2021:



Explanatory Note: UK Imports and Exports by Region, Year to March 2021

While this graph summarises the overall trade imbalance between UK Imports and Exports, the implications for UK farmers and producers would be deeply concerning if food imports are similar in proportion to the overall figures.

Figure 2: UK Exports by Region, 2018 Q2 to 2021 Q1

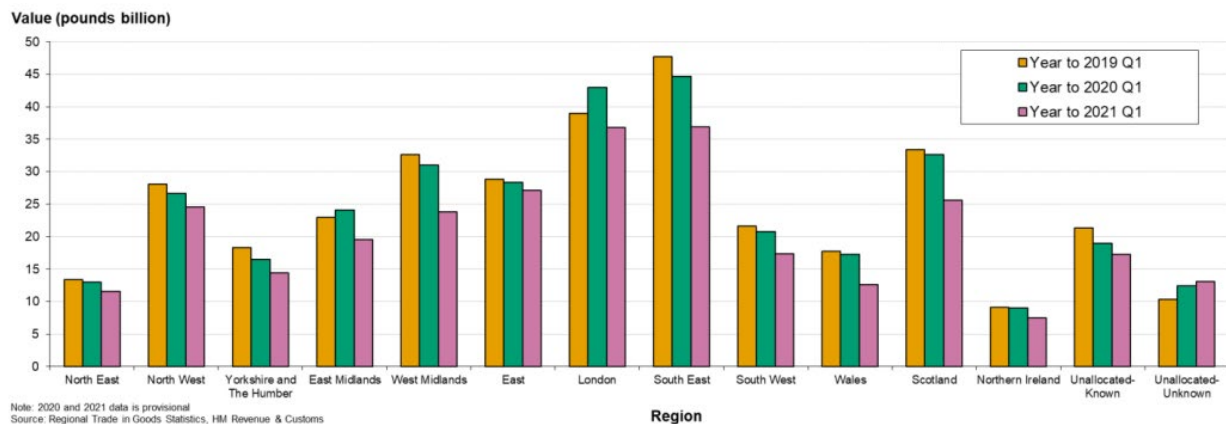
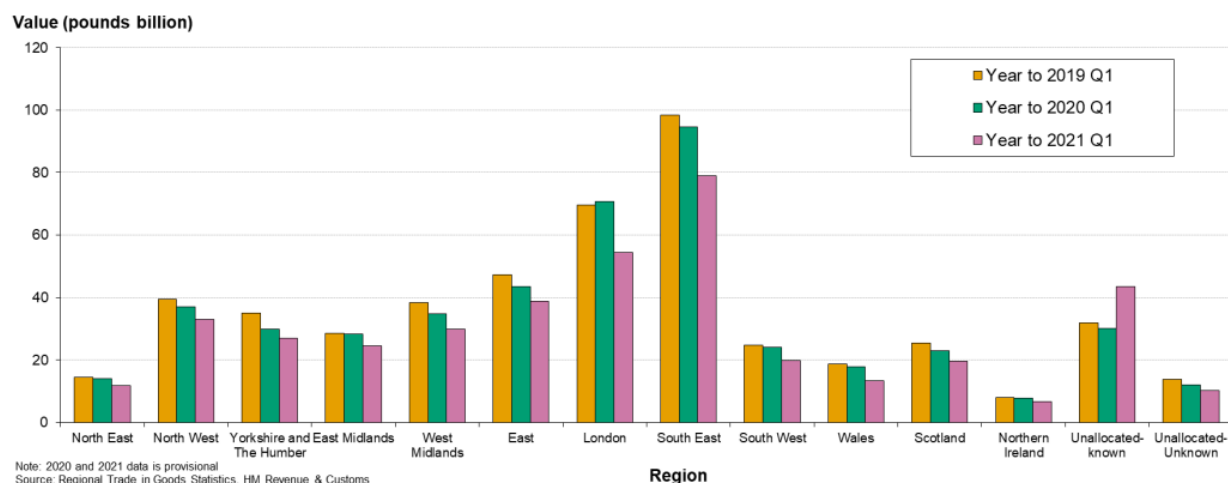


Figure 3: UK Imports by Region, 2018 Q2 to 2021 Q1:



Explanatory Note: UK Imports by Region 2018 Q2 to 2021 Q1

As with the export values at Figure 2 above, import values for all four UK countries - including every English region - decreased, as did the total number of businesses importing from non-EU countries. The increase in imports for Unallocated-Known in the year to March 2021 was largely due to UK Government orders of Personal Protective Equipment (PPE) from China.

Table 1: Agricultural Land Use in the South East and London in 2023:

Measure	South East (including London)	England
Total farmed area (thousand hectares)	1,099	8,999
Average farm size (hectares)	88	88
Rented (% of farmed area)	31%	32%
Arable (% of farmed area)	56%	53%
Permanent pasture (% of farmed area)	30%	34%

Source: [Defra, June Survey](#)

Notes: Arable Includes arable crops, uncropped arable land and temporary grass; Rented land must be rented for at least one year.

Table 2: Principal Crops grown in the South East and London in 2023:

Crop	South East (including London)	England	South East (including London) as % of England
Wheat	205	1,580	13%
Barley	99	799	12%
Oilseed rape	44	342	13%
Orchards	7.8	19	41%
Small fruit	5.4	10	53%
Glasshouse	0.3	1.1	31%

Source: [Defra, June Survey](#)

Notes: Crops displayed are those more predominant in the area; Further data notes on crops can be found below the relevant tables in the [statistical dataset for England's regional breakdown](#) of the structure of the agricultural industry at June.

Table 3: Principal Livestock figures for the South East and London in 2023:

Livestock	South East (including London)	England	South East (including London) as % of England
Cattle	349	4,864	7.2%
Dairy herd	51	1,053	4.9%
Beef herd	59	602	9.8%
Pigs	146	3,633	4.0%
Sheep	1,135	14,451	7.9%
Poultry	6,772	130,549	5.2%
Laying flock	2,447	23,007	11%
Table chickens	2,442	91,096	2.7%
Turkeys	69	2,417	2.9%

Source: [Defra, June Survey](#)

Notes: Livestock displayed are those more predominant in the area; cattle numbers relate to commercial holdings only; sheep numbers include lambs.

Endnotes

- ⁱ Rural Policy Group, *The Sustainable Food Report 2022: Enhancing the financial and environmental sustainability of British agriculture, food and farming*, May 2023, p.2.
- ⁱⁱ *Ibid*, p. 41.
- ⁱⁱⁱ <https://democracy.guildford.gov.uk/documents/s7741/Item%2009%20-%20Rural%20Economic%20Strategy.pdf>.
- ^{iv} Regional Trade Statistics Commentary 2021 Q1 (uktradeinfo.com).
- ^v NB: Covid lockdowns commenced in March 2020).
- ^{vi} In Surrey, a number of former dairy herds have been replaced by beef cattle since the 1970s – notably at the Hampton and Loseley Estates and other large local farms. Grazing land has also reduced – even in Green Belt areas such land has potential for limited and affordable rural housing development.
- ^{vii} Surrey Hills Society, 2016.
- ^{viii} <https://redtractor.org.uk/>
- ^{ix} <https://www.pastureforlife.org/>
- ^x <https://surreyhills.org/love-local/surrey-hills-enterprises/>
- ^{xi} Independent Labour Shortages Report, 2023.
- ^{xii} See analysis provided by the Migration Observatory: <https://migrationobservatory.ox.ac.uk/>.
- ^{xiii} Agricultural Workforce in England, 2023.
- ^{xiv} DEFRA June Survey 2022.
- ^{xv} DEFRA June Survey 2022. Note: 1. “[z]” means “not applicable”; 2. Total labour includes farmers, partners, directors, spouses, salaried managers, regular and casual workers; 3. Casual workers are those usually employed for less than 20 weeks of the year; 4. Number of workers per farm calculations are averages based on the total number of farm holdings in the region; 5. Part time workers are those employed for less than 39 hours a week; 6. Percentage calculations for full and part time workers do not include salaried managers.
- ^{xvi} NFU Horticulture Mid-Season Labour Survey Results, 2022.
- ^{xvii} Rural Services Network, *Revitalising Rural: Realising the Vision: Sustainable Farming and Land Management*, May 2021: <https://rsnonline.org.uk/images/revitalising-rural/sustainable-farming.pdf>.
- ^{xviii} Total Income from Farming (TIFF) is the net income to farms once costs have been accounted for, so is calculated as “outputs & subsidies” minus “inputs & costs”.
- ^{xix} Total output is the gross value of commodities produced without considering production costs or any additional income received through subsidies.
- ^{xx} <https://www.gov.uk/government/statistics/total-income-from-farming-in-the-uk/total-income-from-farming-in-the-uk-in-2022>
- ^{xxi} See: <https://lordslibrary.parliament.uk/environmental-land-management-recent-changes-to-the-sustainable-farming-incentive-and-countryside-stewardship-schemes/>.
- ^{xxii} See: <https://www.ruralbusinessresearch.co.uk/wp-content/uploads/2023/05/Crop-Production-in-England-2019-20.pdf>, p.18.
- ^{xxiii} <https://ahdb.org.uk/GB-fertiliser-prices>
- ^{xxiv} AUK Evidence Pack, 2021.
- ^{xxv} See: <https://www.gov.uk/government/statistics/food-chain-productivity/total-factor-productivity-of-the-united-kingdom-food-chain-2021-final-release#benchmarking-the-uk-food-chain-against-the-wider-economy>.
- ^{xxvi} AUK Evidence Pack, 2021.
- ^{xxvii} In simple terms, Farm Business Income (FBI) is the output generated by the farm business minus total farm costs.
- ^{xxviii} https://assets.publishing.service.gov.uk/media/6627daac81fe3e98d1a7e52a/regional-profiles-stats-region-south_east_including_london-25apr24.pdf. Notes: 1. The Farm Business Survey year runs from March to February; 2. Excludes farms with less than 25,000 euros of standard output; 3. Farm types displayed are those more predominant in the area; 4. Lines or values in parentheses indicate the 95% confidence intervals; 5. Values are rounded to the nearest £100.

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- xxix Evangate, 2023.
- xxx NFU, *Fertile Ground: An Agenda for Growth in the Regional Agri-Food Sector*, January 2021.
- xxxi NFU, AGRICULTURE HOUSE, 2023.
- xxxii Sustain, 2023.
- xxxiii The Food Foundation, 2024.
- xxxiv The Food Foundation, 2023
- xxxv Lacey, 2023
- xxxvi Lacey, 2023
- xxxvii British Apples & Pears Limited, 2023
- xxxviii Whitehead, 2023
- xxxix Whitehead, 2023
- xl Whitehead, 2023
- xli NFU, 2023
- xlii Waitrose Weekend (2023) *The Farming Issue*, Issue 64, 14 September 2023, p.2-3.
- xliii <https://www.surreycc.gov.uk/community/climate-change/businesses/grant-programmes/farming-in-protected-landscapes-fipl-grant>
- xliv <https://magic.defra.gov.uk/MagicMap.aspx?&chosenLayers=aonblIndex,npkIndex>
- xlv <https://www.gov.uk/government/publications/agricultural-transition-plan-2021-to-2024>
- xlvi <https://surreyhills.org/trust-fund/>
- xlvi <https://www.surrey.ac.uk/news/remote-sensing-could-encourage-more-sustainable-farming>
- xlvi NFU 2024, Manifesto, p. 4.
- xlix NFU 2024, Manifesto, p.4.



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