Food Economy Resilience

Greater Brighton Food Scoping

A scoping report prepared for the Greater Brighton Economic Board

June 2022

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Executive Summary

Are Greater Brighton city region's infrastructure, policies and practices fit for a nation looking to increase fruit and vegetable and decrease meat consumption; to improve quality and welfare provenance in fishing and farming; and reach carbon reduction and net zero targets throughout the food supply chain?

Transforming the food system requires engagement with society as a whole, but governments have a unique capacity to set the direction, create shared infrastructures, and mobilise and coordinate action. All governments are bound by commitments to the right to food (UN Declaration of Human Rights) and are responsible for delivering the infrastructure, policies and practices to ensure domestic food security. Each level of government has a role to play to coordinate and guide food system transformation.

Government Food Strategy, responds to the National Food Strategy review, and includes policy initiatives to boost health, sustainability, accessibility of diets and to secure food supply, ensuring that domestic producers and the wider food and drink industry contributes to the levelling up agenda and makes the most of post-Brexit opportunities.

Food system infrastructure runs through all major regeneration projects e.g house building, transport planning, business improvement districts and interlinks with water, energy and climate ecosystems. Building economic, environmental, and social resilience is a strategic priority for the Greater Brighton Economic Board (GBEB) and is captured within the GB10 Pledges on the environment. Food fits within these key areas of focus.

This document presents the findings from scoping existing policy and partnerships in the Greater Brighton city region. Key contacts in each local authority area and the South Downs National Park Authority were interviewed and economic strategies and growth plans were studied. Key priorities, interests and ambitions emerged for each local authority area and case studies of food system innovation were followed up. Food system transformation will drive sustainable economic development and growth across the city region, if co-ordinated economic development activities and investment are planned at city-region level. The scoping findings offer the basis of a Greater Brighton Food Plan and a clear approach to collaborative work. The next phase of this work moves from the 'scoping' stage to considering current financing and the 'proper costing of food system infrastructure requirements'.

Recommendations:

That the Board agrees to the next phase of work which includes:

- **Identification of a mechanism to co-ordinate action and feed progress into the GB10 pledges**
- **Advice on alignment of policies, metrics and action focused on food system transformation by LA areas**
- **Budget allocation to create investment plans for infrastructure, business support and training**
- **A call to business, education and food partnerships to support food system transformation**
- **Seeking partner updates on how food system innovations are being embedded into practice**

Introduction

There are examples of the food system in transition all across the Greater Brighton city region. Localities are increasingly experiencing system shocks that are forcing them to innovate and collaborate in new ways. Key food system assets and actions across the city region have therefore been scoped in order to obtain a sense of relative policy priorities. Many of the core policies that are needed to help the system withstand short-term shocks are the same as those needed to improve productivity, support adaptation and build resilience.

''Carbon reduction targets can be made throughout the food system; Employment in the food sector and food networks can become an attractive career choice: Businesses can get local, sustainable and healthy food on plates at home and out of home: Social innovation can inform and anchor economic developments and land use planning; Existing support and funding programmes can be targeted to enable a critical mass of activity that could attract inward investment''. GBEB Report July 2021

In a world in need of unity and stability, food systems offer a unifying focus through which transformational change can be grounded and accelerated. Creative collaborations through food workstreams reveal pathways to focus lobbying and attract investment. New relationships within the Greater Brighton city region food network are being built already and knowledge is being transferred.

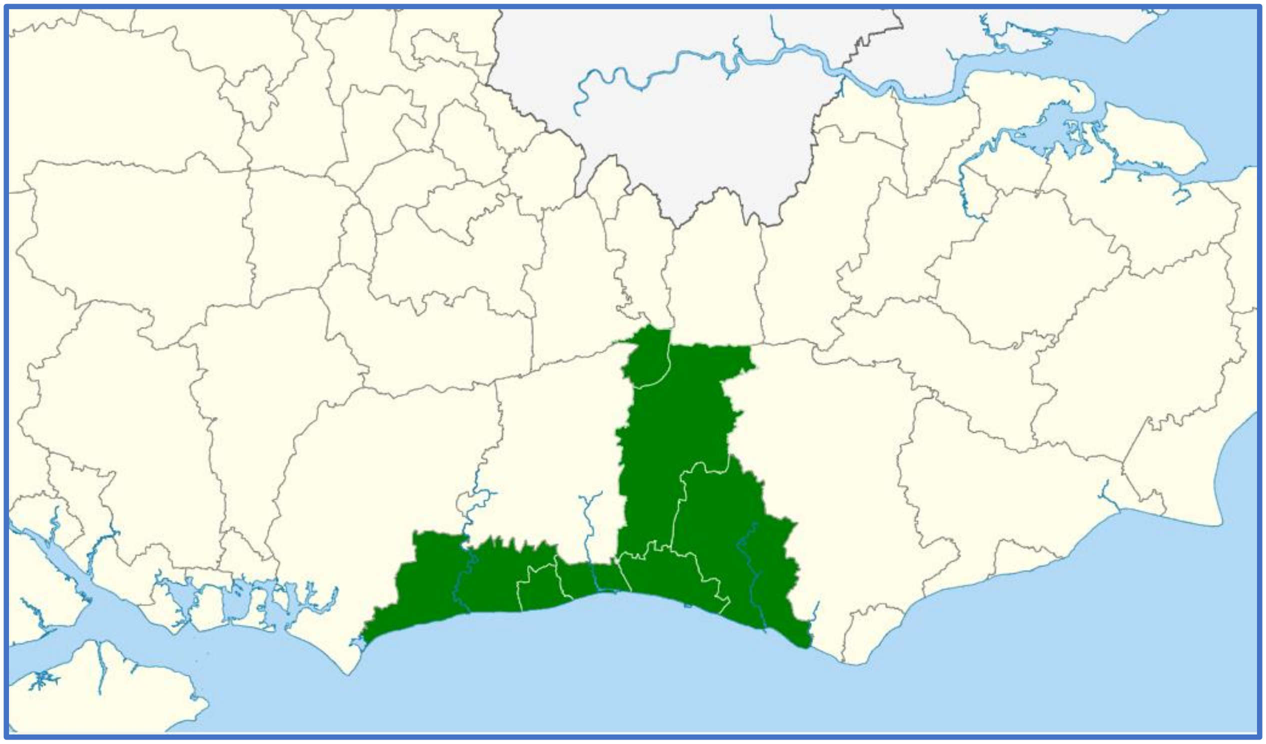
The recommendations arising from this scoping work are focused on unlocking the next phase of work to develop a Greater Brighton Food Plan and the associated city region food system investment plans. Achieving these outcomes will depend on collaboration through partnerships and LAs and the coordination of activites to build the investment case to transform the city region's food system.

Ten questions worth asking:

1. **Food Partnership** – Does an area have a food partnership and food strategy?
2. **Policy Coordination** – How is food policy coordinated in your area?
3. **Resilience** – What emergency food planning is happening?
4. **Food Use and Food Waste** – Do we know our food use and food waste metrics?
5. **Procurement** – How do local procurement policies relate to food?
6. **Planning and Housing** – Do we have policies to encourage food growing?
7. **Infrastructure** – Have we planned/costed food system infrastructure opportunities?
8. **Visitor Economy** – Do we know what business support your hospitality/food services need?
9. **Research & Skills** – What food systems research is there for our area?
10. **Health & Wellbeing** – Do we understand public health outcomes of a shared food system?

Mapping Greater Brighton

The Greater Brighton City Region is a mix of coastal, urban and rural landscapes (including the South Downs National Park, a UNESCO biosphere and a number of areas of Outstanding Natural Beauty). The city region is in South East England, centred around Brighton and incorporates seven local authority areas in East Sussex and West Sussex.



Greater Brighton City Region map.svg - Wikimedia Commons

Greater Brighton city region has significant assets to draw on to progress food system transformation.

Scale, location, proximity to London and Europe are all important, but it is the collective creative potential of businesses, institutions and local communities together that are key to building long term food system resilience. Together, they have the ability to support the foundational food system assets.

See table in Appendix 1 on page 24 for an overview of potential key assets across local authority areas. This table provides a useful framework to see how LAs could increase and connect activities across the city region to transform our food system.

The most basic assets for food production include soil, biodiversity, fresh water, energy and land. Supported and well-functioning biodiversity and eco-systems are the first requirements for the Board to take into account when making decisions that ensure that activities contribute to net zero, long term resilience plans, nature recovery and healthy life expectancy outcomes outlined in the GB10 pledges.

Rethinking our consumption of resources and reducing our demands on land and resources means people, businesses and institutions becoming ever more connected with foods production in the soil.

The water, energy, agriculture nexus is highlighted in the [Greater Brighton Water Plan] which states it is essential that the challenges around water, energy and agriculture are addressed in an integrated way. With support, knowledge could be transferred to food sector businesses from relevant [Greater Brighton Energy Plan] projects e.g. electric vehicles, solar energy, waste to energy and food waste gas to grid.

Maintaining the momentum and political focus for long term change is hard, but there are clear signals that coordinated action is starting to take place. At every spatial scale exists the potential to collaborate and further develop food system solutions. The diagram below is useful to consider each spatial scale.

The determinants of health and well-being in our neighbourhoods

[State of the environment: health, people and the environment - GOV.UK (www.gov.uk)]

Greater Brighton is one of the [One Public Estate] partnership areas having joined the programme in 2016. This brings together a combined estate of over 3,500 land & property assets, valued at £3.5bn.

Inspirational food system solutions, rooted in local people and businesses experience and practice can be communicated to developers, architects, city planners to then explore the options systematically.

Mapping Local Authority Areas

Adur and Worthing - Adur has significantly more manufacturing and wholesale businesses while Worthing is more dependent on services including accommodation and food and retail. Recognised strengths to be built upon include **accommodation and food and the large manufacturing base**, particularly in Adur where it is a significant contributor to total output. The marine sector is small, but given the coastline and Shoreham Port, there may be opportunities to develop it. The **visitor economy** also offers an opportunity for development given the expected rise in staycations e.g. Time for worthing – worthing weekender. A growing number of major companies and trade partners, including Infinity Foods and Higgidy Pies, are choosing to invest in Adur and Worthing, drawn not only by the prime location but the access to skills and talent, variety of competitively priced commercial and residential property and high quality of life on offer. **Commercial food waste collections have begun**. There is commitment to encouraging investment and supporting the growth and development of a dynamic and innovative business network across Adur and Worthing. Food system research is underway (Food, land, learning in Adur and Worthing) to develop shared plans. Adur and Worthing has a Food Partnership and the local authority has a **well established community development and sustainability approach**.

Arun – Arun has the highest percentage of **employees in agriculture, forestry and fishing** among its comparator areas, reflecting the strong presence of the horticultural sector in the district. The horticulture industry grows a range of soft fruits, herbs, sweet peppers and plants and is a key feature of the coastal plain in the district, making use of the fertile alluvial plain, beneficial climate, long sunshine hours and the high light levels. It is also a high-tech industry. There are some worrying **skills gaps in the horticultural industry to tackle**, including seasonal pickers and migrant labour, a need for STEM skills as well as leadership and management, HR and other business skills, energy management, supervisory skills, technology and digital business growth. Arun leads on the proportion of employment in **accommodation and food**. Arun recognises that town centres will have to change to survive with a proportion of retail outlets converting to service-led businesses such as food and drink, hair and beauty and gyms, or small offices, creative workspace, community services and housing. This attracts younger people to live, work and enjoy leisure facilities, breathing new life into town centres. There are opportunities to adapt to changes in the sector by the **repurposing of former retail units** for footfall-led activity such as food and drink, office, leisure, cultural, residential and social destinations.

Brighton and Hove – Brighton and Hove established an innovation programme to look at the challenges in the economic strategy and identify who takes this forward. Specific issues of economic focus included: productivity, energy, water, health and inclusion, electric/autonomous vehicles, food security, circular economy, affordable housing and digital infrastructure with greater engagement of partners. Brighton and Hove is a visitor destination with a **strong food and drink, accommodation and cultural offer.** Enhancing the productivity of the workforce will define economic success. Brighton and Hove seek to innovate and test new solutions in food and energy security and recognises the strengths of partner authorities in horticulture and green energy to gain insight and develop new partnerships. **Innovations in food security** are reported through the Economic Strategy and a range of other programmes e.g. Carbon Neutral 2030 Programme, Circular Economy Routemap and CDP Reporting. Council owned agricultural land holdings are a significant asset. The Brighton and Hove Food Partnership is locally and internationally recognised for its approach which is outlined in the city's **Food Strategy Action Plan.**

Crawley – West Sussex's rural businesses need **improved digital and mobile connectivity** to better enable marketing, advertising and selling opportunities, including in the food and drink and visitor economy sector. Crawley has the largest number of people employed in **transportation and storage** compared to other local authorities and the UK as a whole. This is very important for food systems. The visitor economy and local food and drink are identified as key strategic sectors in Crawley. The county is home to a **range of small micro food and drink producers,** including local food and farm shops, restaurants, pubs and cafés, vineyards, breweries and food producers who sell directly to the public. The County Council has been very proactive in supporting the sector through Taste West Sussex initiatives. A key opportunity was identified to enhance the visitor experience and product, with food and drink experiences. Priorities include promoting, encouraging and **supporting links between the visitor economy and local food and drink sector**, through Taste West Sussex food and drink experiences. The county council want to work with entrepreneurial micro and small businesses on targeted initiatives that will contribute to their growth, for example in the food and drink sector, and the creative digital sector.

Lewes and Eastbourne – East Sussex Cultural Strategy 2013 – 2023 identified the need to present well packaged ideas bringing together cultural attractions with other elements such as accommodation, food and drink to make it easier for tourists to choose East Sussex. There is a need for **networks to combine marketing strategies between cultural organisations** and use those messages to attract businesses to locate in East Sussex. The corporate plan, 'Reimagining Lewes District', sets out the council's ambitions to achieve net carbon zero whilst continuing to embed **community wealth building principles** within the district. Agriculture and food is a strategic action area in the Climate Change and Sustainability Strategy 2021. Strategic goals set for 2030 in Lewes include agriculture and food, by working in partnership with others to **educate and enable residents to access affordable, local and seasonal food**, through supporting opportunities for local production and distribution. Interim targets include agriculture and food and specifically, to engage with all council tenants about food growing and create governance and draft strategy for a local food partnership by 2022. Newhaven's Future High Streets Bid has a **stepping stone economic model to help business start-ups** to take hold. Where market traders can move into small food kiosks and food trucks move into restaurants on the High Street.

Mid Sussex – Mid Sussex is supporting and encouraging local business growth through the provision of council services and awarding of council contracts. There has been an increased percentage of food businesses achieving good or very good ratings. Mid Sussex continue to use the **council's procurement to help support the local economy by procuring goods and services**, where appropriate, from local small and medium sized enterprises. Positive support and advice is provided to new and existing businesses on food, health and safety, environmental, planning and licensing matters to help new and growing business to understand and navigate through the regulatory environment. Proactive work with business organisations develops an **on-going dialogue to identify and respond to business concerns**. Extended support and signposting services are provided to local businesses on grants, funding, business advice, start up information, premises, business rates, etc. Support is provided to and through East Grinstead Business Association (EGBA), Haywards Heath (HHBA) and Burgess, Hill Business Parks Association (BHBA). As detailed in the Mid Sussex economic recovery plan 2020-21, the **three excellent Business Associations, and the Chamber of Commerce** delivered a package of measures to ensure the re-opening of the High Streets safely; providing advice and assistance to 71 new food businesses and helping pubs, social clubs and other licenced premises to open safely.

SDNPA boundaries include parts of Arun, Worthing, Adur, Brighton and Hove, Lewes and Mid Sussex.

Mapping Greater Brighton: Seeing things differently

All Local Authority areas are at different stages in food system transformation. The board can facilitate commitment and ambition by encouraging and supporting the development of local food strategies. Sustainable Food Places (national) and Milan Urban Food Policy Pact (global) already provide evidence-based frameworks. These are the leading frameworks providing a form of governance, clear metrics, networking and support, as are the Glasgow Food and Climate Declaration and Barcelona Challenge.

To ensure that the direction of travel links up to GB10 pledges connecting frameworks were studied. The Carbon Disclosure Project framework lists co-benefits of actions in the Food Data section as below. This framework is aimed at cities and aligned to SDGs, Race 2 Resilience and the European Climate Pact.

Carbon Disclosure Project: Co-benefits of actions in Food Data section

Economic	Social	Public Health	Environmental
Job creation	Increased water security	Improved physical health	Reduced GHG emissions
Revenue generation	Increased food security	Improved mental wellbeing/quality of life	Improved water/soil quality
Reduced costs	Improved mobility and access	Improved air quality	Improved waste management
Increased energy security	Improved road safety	Improved preparedness for health service delivery	Reduced noise/light pollution
Business/technological innovation	Reduced fuel poverty	Reduced health impacts from extreme heat or cold weather	Increased/improved green space
Increased labour productivity	Increased security/protection for poor/vulnerable populations	Reduced disaster/disease/contamination-related health impacts	Protected/improved biodiversity and ecosystem services
Improved labour conditions	Increased social inclusion, equality and justice	Reduced premature deaths	
Increased economic production	Increased transparency and accountability	Reduced health costs	
Reduced natural resource depletion	Improved education and public awareness on climate issues		
Reduced congestion	Fewer or no households and businesses forced from homes/places of work		
Reduced disruption of energy, transport, water, communications networks			

Adapted from 2022 version of Carbon Disclosure Project Guidance and Questionnaires
Framework Mapping Assessment: Adaptation and Mitigation: Food Data

Companies, cities and regions report on their actions and co-benefits through the Food Data section.

Area of strategy/plan:	Food policy: Stage of project development (e.g., scoping), State of financing
Project area:	Sustainable food consumption/production
Sectors adaptation applies to:	Agriculture, Fishing, Manufacturing, Water supply, Waste management, Accommodation and food service activities, Information and communication
Action:	Climate Hazard that action addresses

Questions in the Food Data section include:

What percentage of your population is food insecure and/or lives in a food desert?
Report the total quantity of food that is procured (in tonnes) for government-owned and/or operated facilities (including municipal facilities, schools, hospitals, youth centres, shelters, public canteens, prisons etc.). If available, please provide a breakdown per food group.
Total annual amount of food waste produced (tonnes/year)
Recovery interventions that channel investment in sustainable, resilient agriculture and food supply chains
Timeframe for which increased resilience is expected to last
Proportion of the population with increased resilience due to adaptation action
Hectares (ha) of natural systems with increased resilience due to adaptation action
Funding source(s)
Estimated annual emissions reductions (metric tons CO2e/year)
Estimated annual energy savings
Estimated annual renewal energy generation

The CDP framework does not cover the full range of metrics Food Strategies and Partnerships develop, but it illustrates the convergence of activities and how we can report them locally and as a city-region. **What it does make clear is how we can co-ordinate food system action to produce various co-benefits:**

- As a city region it should be possible to coordinate action to share best practice and transfer knowledge on preventing food waste and household and commercial food waste collections.
- As a city region it should be possible to coordinate action to increase public procurement of locally grown and produced food and facilitate the development of food hubs and shorter supply chains.
- As a city region it should be possible to coordinate action to increase local food growing, regenerative and nature friendly farming and develop supportive distribution systems.
- As a city region the practical application of learning from research could be accelerated by requesting help from research partners to start to compile evidence that proposals work.
- As a city region a shared brand could help bring together the various geographies to focus on food system transformation.
- As a city region it will be necessary to develop and test food system infrastructure investment plans through e.g. community infrastructure levy IDPs and major regeneration programmes

Infrastructure

Although the focus of this scoping was the city region, data was often only available at certain scales e.g. UK, South East, East or West Sussex, Local Authority areas, and for clusters of the Local Authority areas. In order to know what gaps there are we have to reassemble existing data to put the spotlight on food.

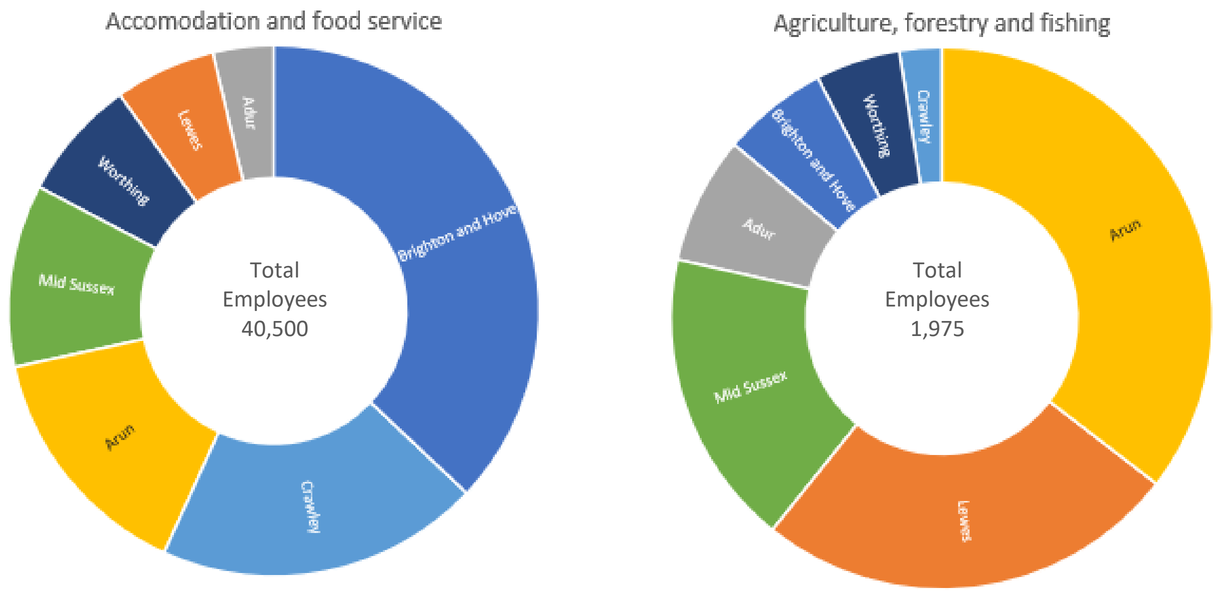
UKRI Economic summary of the UK Food System

[Mapping the UK Food System – A Report for the UKRI Transforming UK Food Systems Programme (ox.ac.uk)]

Higher level data and specialist support would be required to create a similar infographic illustrating the Greater Brighton City Region food system. This would be a useful economic summary for the city region. Leeds and London have gone a step further to look at inputs, outputs and material flows, and doing a similar piece of research for Greater Brighton could be explored.

UK Standard Industry Classification (SIC) code the wide range of activities that make up the food system. Some food classifications are grouped within other wider general classification codes e.g manufacturing, which makes it quite difficult to draw out the food system data neatly and regroup it for further analysis. The Local Authority Economic Strategies include Accomodation and Food Services data but few have information from the relevant food system SIC codes in Agriculture, Forestry and fishing; Manufacturing; Wholesale and retail trade have separated out the Accommodation and Food and beverage services categories into Restaurants and mobile food: Event catering and other food service: Pubs, bars and clubs. See appendix 12 for Greater Brighton Food Sector Business Types. ONS (2020).

Employment by Industry of each LA area and as Greater Brighton (2019)



[Population profiles for local authorities in England - Office for National Statistics (ons.gov.uk)]

The diagram above shows the number of employees in Greater Brighton by the key food sectors of Accommodation and food service and Agriculture fisheries and food using the latest Business Register and Employment Survey estimates. This makes the LA economic sub sector specialisms more visible.

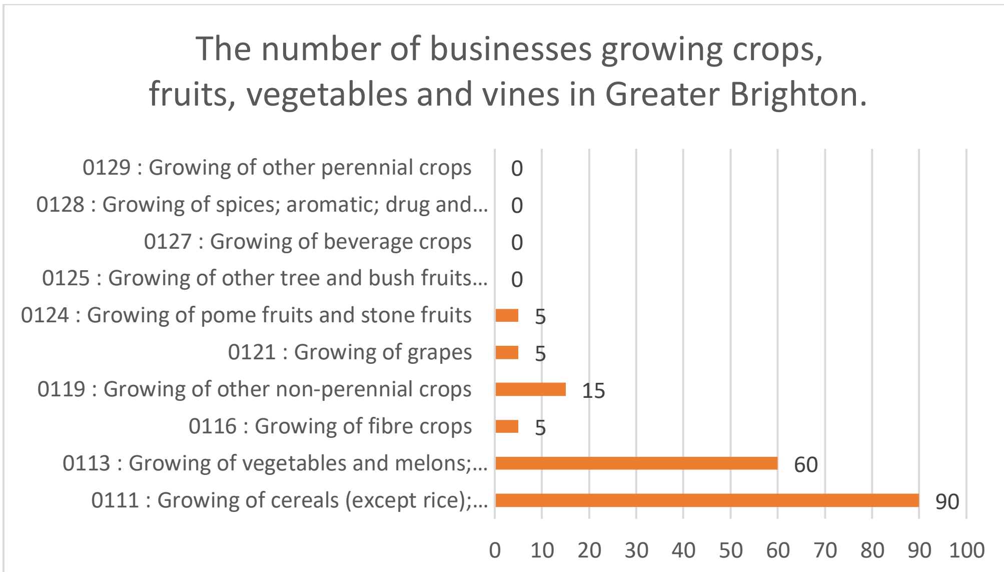
Coast to Capital strategic economic plan 2018-2030 **analysis revealed that future economic strengths lie in a range of economic sub-sectors in distinct, localised areas, rather than a smaller number of broad sectors across the whole area.** Horticulture and food manufacturing were identified as such sub sectors for Arun, Lewes and Mid Sussex. The report refers to plans for more work with partners to understand what the specific opportunities are for growth in each of these sub-sectors, and what kind of investment is needed to unlock their potential and boost overall productivity e.g. as one of the largest horticulture areas in the UK, employing upwards of 9,000 FTE jobs and providing in excess of £1 billion production. The report also highlights the importance of the Visitor Economy and support services.

Coastal West Sussex White Paper 2021 **highlights horticulture as a flourishing West Sussex industry in tune with the environment. Skills gaps in the horticultural industry include not only** seasonal pickers and packers after Brexit, but also STEM skills as well as leadership and management, HR and other business skills, energy management, supervisory skills, technology and digital business growth. Key drivers for the industry in building resilience and delivering adaptations include water and the global water trade, veganism, food miles, food security and energy. It is recognised that scaling up adaptation and innovations requires local co-ordination and cannot be down entirely to the individual businesses.

Focusing in on some other sub sectors allows us to see where investment is most needed and to learn how to couple investment with active food system planning and achieve progress for the GB10 Pledges.

Horticulture

In June 2021 all active commercial farm holdings in England received a Census of Agriculture questionnaire to complete. The census data is collected under the Agricultural Statistics Act 1979 and captures detailed information on land use, crop areas, livestock numbers and farm labour**. The survey results show that approximately 43% of survey respondents needed seasonal labour.** The average shortfall was 10% and ranged from 39 person days in July to 61 person days in September. UK farms were reported as missing up to 75% of seasonal workers needed for harvest. [The Grocer, 19 May 2022](#)



The data contained in this Office of National Statistics analysis are produced from a snapshot of the Inter Departmental Business Register (IDBR) taken on 12 March 2021 (Data are rounded).

Viticulture

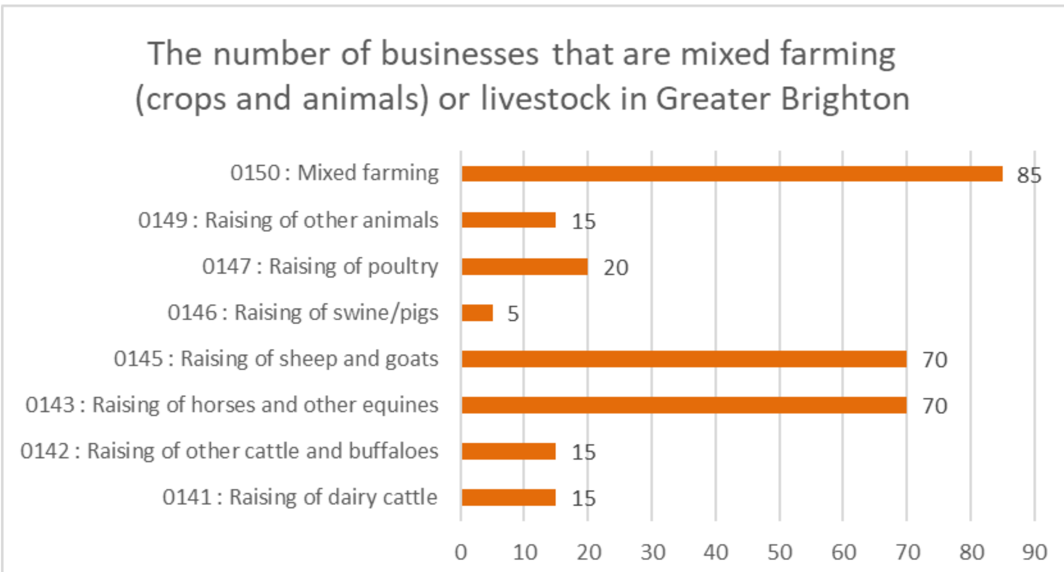
By 2020, 436 ha of vines had been established within the SDNP (0.26% of area) across 51 vineyards ranging in size from 0.15 to 91 ha. This is a fast growing and innovative sub sector that has the potential to catalyse other sub sectors. There are transferrable skills and business approaches that can be shared.

Findings of key significance from the South Downs National Park Viticulture Growth Impact Assessment

- There has been a significant recent expansion of UK vineyard area (>300% between 2005-2019).
- There is ~ 40,000 ha of terrestrially and climatically suitable viticulture land in the SDNP.
- The environmental and landscape impact of vineyards and wine production in sensitive landscapes has the potential to be high unless well managed.
- A majority (53.5%) of the SDNPA Citizens Panel survey respondents thought that an increase in vineyards in the National Park would provide a positive impact.
- Significant concerns in relation to environmental impacts, were raised by the Citizens Panel, representatives of the Parish Council and community groups, and SDNPA members.

- This study has reviewed, at a high level, the ecosystem service benefits that viticulture and wine production can bring, and the risks they pose to these benefits.
- Several initiatives are recommended to facilitate vineyards and wineries improvements to be better neighbours and landscape custodians.
- Education is a recurring theme and schemes are recommended that facilitate the evolution and adoption of best practice and good environmental stewardship are.
- There are clear opportunities for exemplary winery design and the sensitive development of winery related infrastructure within protected landscapes. However, recommendations for such are restricted to guidance and process offered through planning policy.

Livestock and dairy farming



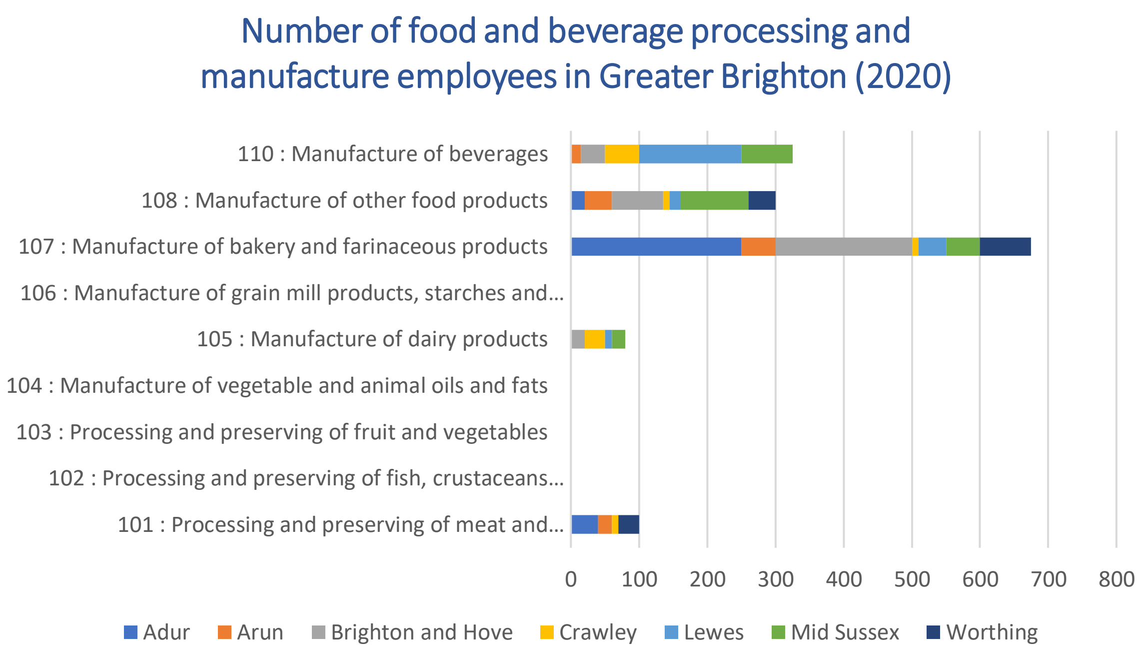
The data contained in this Office of National Statistics analysis are produced from a snapshot of the Inter Departmental Business Register (IDBR) taken on 12 March 2021. (Data are rounded).

Three common denominators that will define the successful farm enterprises of 2040 are identified in the NFU Future of Food 2040 report:

- **Risk management** – managing the increasing exposure of farming to risk and volatility by embedding resilience into the business model and accessing the right data and financial tools to help them.
- **Transparency** – being able to stand up to the intense scrutiny of an increasingly demanding customer and the exposure made possible in an increasingly transparent food system.
- **Business sustainability** – smart, professional rural businesses knowing and increasingly anticipating their end market. Making the most of marketing and entrepreneurial skills used in combination with productivity-enhancing innovation and technology to achieve sustainable outcomes.

Fishing and the marine economy

Supporting the long-term future of the fishing sector depends on investment in better infrastructure, strengthened supply chains, new jobs and on fishers learning more sustainable fishing techniques. Ports and harbours need to be modernised and capacity and efficiency increased at processing and aquaculture facilities. Fishery infrastructure improvements can help reduce carbon emissions, help increase the sustainability of the sector and contribute towards the UK's commitment to reach Net Zero. [Discover Seafood] is an interactive portal with local port maps and information on local seasonal catches.



Business Register and Employment Survey: open access
ONS Crown Copyright Reserved [from Nomis on 23 May 2022] (Data are rounded)

How do we make fishing climate-smart?

Findings from the [Marine Conservation Society report 2021]

- **Reduce pressure from fishing gears** like trawls and dredges by incentivising a move to less damaging fishing methods such as bottom longlines
- **Increase transparency and traceability across UK fishing industry** to improve understanding of impact of fishing and aid stock recovery. This could be achieved by mandating the installation of Remote Electronic Monitoring systems with CCTV cameras across the UK fleet to provide a true picture of catch levels and data to improve management
- **Ban bottom towed gear to protect and enable recovery of blue carbon habitats** within existing Marine Protected Areas (MPAs) designated for seabed features, as well as limiting towed gear in important blue carbon sites outside current MPAs
- **Create incentives to decarbonise the UK fishing fleet and eliminate inefficient fleet structures**, for example by ending fossil fuel subsidies and encouraging fishers to move to electric and solar powered vessels

Supply chain mapping in East Sussex – Researched by Sustain

With the UK Government seeking to 'level up' the country, now is the time to channel investment into localised food systems and infrastructure. To understand what needs to be invested in at that local scale we need to know what infrastructure exists, whether it contributes directly to the local food system, what farm types there are in the counties, and therefore, where the gaps in infrastructure are that need to be invested in.

Summary of findings

- One of the main barriers that we came up against was **a lack of data on infrastructure and local food enterprise.** We found high-level information through the Office for National Statistics (ONS) and the Fame database, but this was not detailed enough. We decided to do primary research with farmers and food producers to find out more local insight.

- Across both counties, we found **commonalities in the types of infrastructure that farmers wanted access to or to invest in on-site**. Farmers were very interested in the idea of local food hubs that have capacity to carry out processing, storage, packing, distribution, and selling capabilities. Mobile abattoirs, on-farm dairy processing, and vending machine equipment were also popular ideas.

- Some of the horticultural growers who like to sell direct to customer suggested they have adequate on-site infrastructure to wash, dry and store produce before sending it off to market. However, **many expressed their interest in local food hubs** that can also offer this alongside an ability to help farmers and growers' access local markets and electrified distribution.

- **Livestock farmers were concerned about the ever-decreasing amount of local infrastructure**. Some of the dairy farmers we interviewed are on an Arla milk contract and were relatively comfortable with that, but most said they want to diversify their markets to be less reliant on one buyer and to grow their connection with local citizens.

- It was clear that collaboration was of importance to farmers and food enterprises. For instance, **farmers want to collaborate when it comes to logistics so that distribution space is full, and delivery vans are not half empty**. Collaboration was seen as important to access more local markets, compete locally with supermarkets, and be more cost and time efficient.

- This mapping work requires further investigation to better understand the state of play in both counties. We also call on the UK Government to collect and share relevant data. We also **acknowledge the crucial role that partnerships and networks have, and farmers and growers saw food hubs and food partnerships as critical to building local networks and collaboration**

A tale of two counties: Strengthening local food cultures through mapping supply chains in East Sussex and Lancashire. Sustain: the alliance for better food and farming. March 2022.

Business partnerships

There are a vast range of business support services and routes to access grants generally, yet it is not easy to see where specialist support is available to food businesses and to the food sector as a whole. This is important as food businesses have specific needs e.g. hospitality recruitment and retention, that if not met, they can not progress to the ambitious long term adaptation challenges. A detailed summary of specialist food business support and current grants available for SMEs would be helpful. SDNPA have undertaken extensive food and drink sector mapping and are already supporting food businesses networks (including farm businesses). Chambers of Commerce and Business Improvement Districts e.g. Manor Royal, Brilliant Brighton are well placed to impact at scale. Mid Sussex Business Associations are developing well. Work is underway to develop an ecosystem of business networks to support SMEs transition to the circular economy. We need to understand who makes the strategic assessment of food bussinesses and where that information then goes e.g. Is it informing city region level funding bids and infrastructure development? There may be a disconnect with grants that can not be accessed to fund food and drink sector/agricultural SIC codes. This gap needs to be investigated further. There are a wealth of suitable funding opportunities highlighted through the Grantfinder page but these are only useful if they reach the businesses at the right time and adequate support is given for the next steps.

Education partnerships

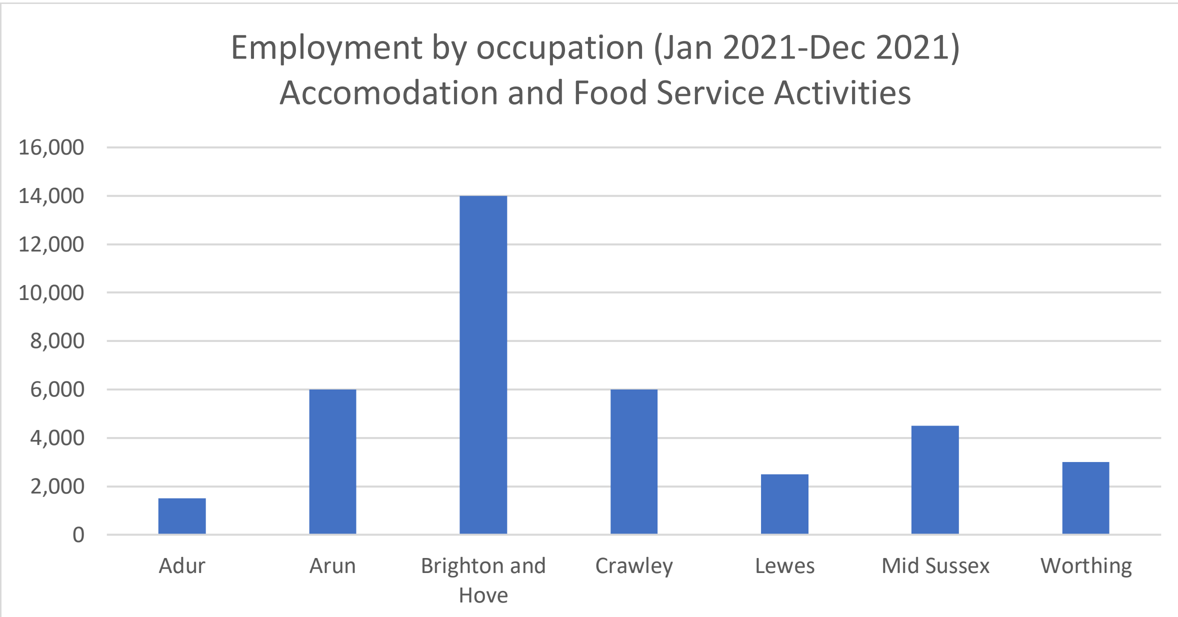
Every aspect of this scoping could be strengthened from collaboration with the various education partnerships. They are shaping the future employees and employers and act as anchor institutions able to develop the evidence base and draw in investment for food system transformation. Research work is often international, but there is a clear commitment to turning research into practice through collaborations with Plumpton College, University of Sussex and the University of Brighton. Greater Brighton Metropolitan College and Crawley College have a central role to help fill the catering skills gap. Work could extend to the University of Chichester with its college groups. Not only does the city region have excellent universities and colleges but it is also a connection to local schools in every community. Cooking is a life skill, an important part of self care and provides a way to learn food system knowledge. If we are really aiming for transformational change, we need to know what the children are learning. Specialist expertise exists and is expanding e.g. University of Sussex Business School, Green Growth Platform, Sussex Innovation (SINC), Food Systems Doctoral, Sussex Sustainability Research Programme and across a number of departments e.g. University of Brighton School of Architecture Technlology and Engineering, Business and Life Sciences and Hospitality and Catering features in all city region colleges.

Local Food Partnerships

All Local Authority areas have some form of food network with links to the local community and to a range of business partners, whether formed to provide emergency food or to develop food strategy. The public want innovation to be a force for social change as well as for sustainable economic development. Food partnerships engage with the community and food businesses at a very local level e.g. hospitality and retail sector, food producers and community food projects. Examples include Sussex Food Partnerships, Brighton and Hove Food Partnership, Sustainable Food Places (UK wide) and community engagement through all LA's and SDNPA and the Biosphere Management Plan. It cannot be expected that they have the resources or the capacity to carry forward this work but they are critical to guide it and represent residents voices in the process. These partnerships have local intelligence and are a barometer of the everyday realities Greater Brighton residents face when making their food choices.

Moving from food system insecurity to opportunity

Hospitality is the only industry in a position to deliver post-pandemic jobs, growth and investment at speed and across all communities of the UK. Shelter Hall provides a unique platform in the widest sense for caterers to develop their brand and business. The infrastructure they created is both about physical space but also about social networks and is a unique asset to Brighton and Hove, the city region and UK.



Labour Market Profile - Nomis - Official Labour Market Statistics (nomisweb.co.uk)

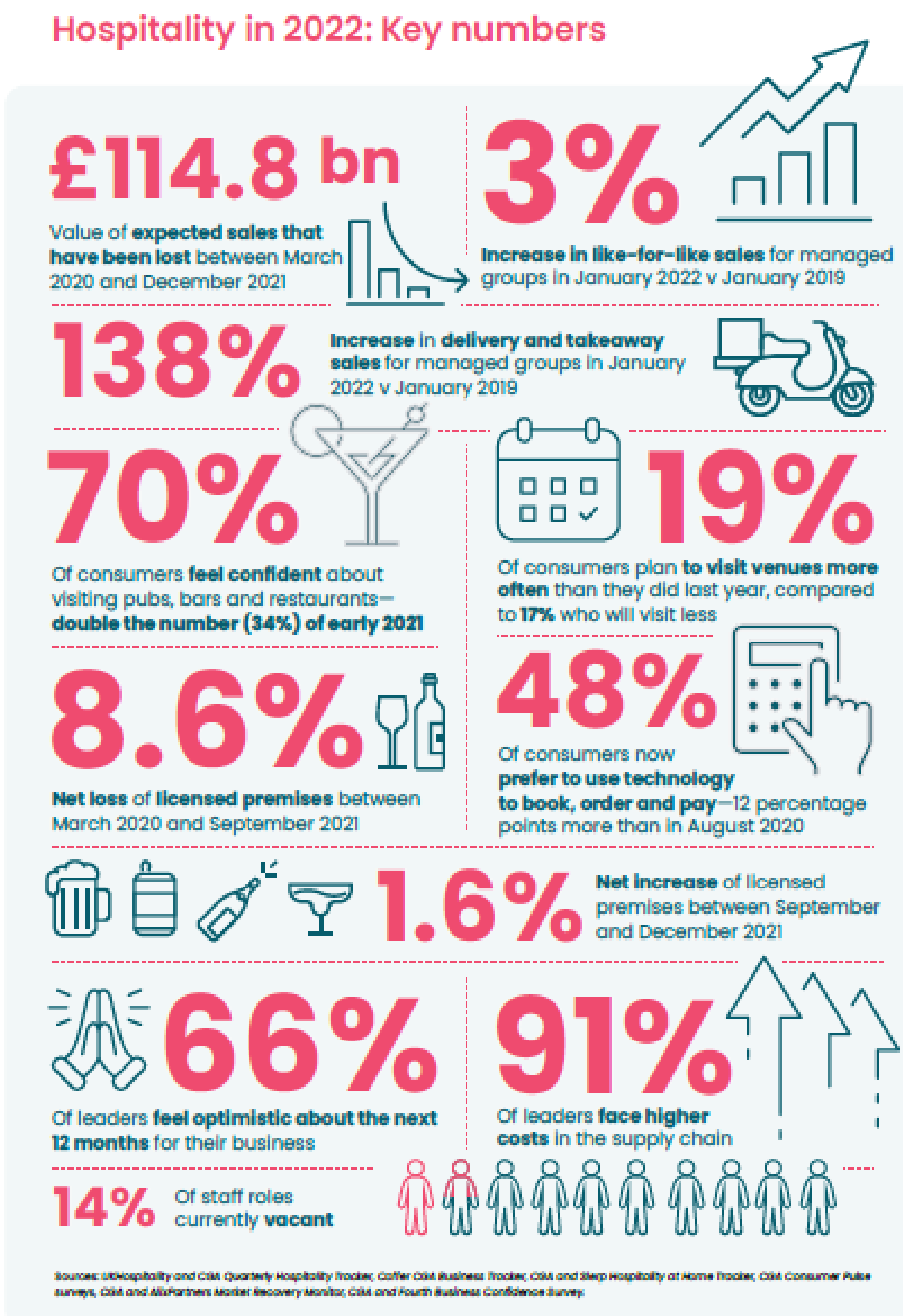
Hospitality businesses now face a variety of new challenges and threats. Costs are rising in key areas like food and energy, while there are still chronic shortages of staff. Problems with recruitment and retention of staff plague the sector with 14% of staff roles currently vacant nationally. Disruption to supply caused first by Brexit and then by COVID goes on. High levels of inflation are making it very difficult for operators to achieve real-terms sales growth. These enormous challenges come at the worst possible time for businesses facing high levels of debt after two years of turmoil. The sector calls on government to look into solving tax and labour problems. Consumers' passion for restaurants, pubs, bars and hotels is as strong as ever, and hospitality is ideally placed to power the UK's economic recovery. **The hospitality industry needs proper, sustained support if it is to achieve this**. If given the right support, the hospitality sector can play a key part in the Government's Levelling Up agenda.

UKHospitality & CGA Future Shock Report - Issue Ten - Hospitality in 2022

UKHospitality - Future Shock 10 - Page 1 (publitas.com)

The hospitality sector has cautious optimism

Trading, especially for leading managed groups, is edging back towards pre-COVID levels. Consumers and business leaders are recovering their confidence. Site openings, which are always a good barometer of the mood of the market, are heading in the right direction. The delivery and takeaway market, which was a lifeline to operators during lockdowns, continues to flourish and is adapting to customer needs.



UKHospitality - Future Shock 10 - Page 1 (publitas.com)

Metrics

Data for all 7 local authorities is a valuable resource to inform and drive targeted policy action at the local level in order to improve food security and deliver on many agendas. Not all data was available.

As an absolute minimum the city region needs to:

- know the percent of population that is food insecure.
- have food partnerships developing local food strategies.
- monitor the key polices relevant to food systems transformation.

Throughout the scoping food system data was accessed primarily from online sources and databases e.g. those available at the Business and Intellectual Property Centre (BIPC) such as IBIS world, Local Government Online and Mintel. ONS, DEFRA and NOMIS data were also used to try to get more granular information. Although searches were made, not all LA level data could be found online e.g.,to investigate e.g., procurement, planning, health and obtain detail about all relevant local policies.

If well maintained, this information would be very useful for emergency planning and Local Resilience Forums when required in the future e.g. to find a range of solutions to help the most vulnerable. At the same time, this data will provide intelligence for food system infrastructure investment decisions.

In the same way as the CDP reporting framework is using data reported on metrics to plan and guide investment decisions internationally, Greater Brighton city region can create a decision-making path. This will reveal a combination of large projects and clusters of small projects that are linked together.

The Food Foundation Food Insecurity Tracking 2022 **uses regular nationally representative surveys to assess UK food insecurity levels**, particularly focussing on at risk groups. UK local food insecurity of Adults (Jan 2021) mapping at LA level has been developed and shared by the University of Sheffield.

Food is one of the UK's thirteen critical infrastructure sectors with Defra as the Sector Resilience Lead. The Government has a duty to report triennially on food security in Section 19 of the Agriculture Act 2020. The first UK Food Security report was published in December 2021, before the war in Ukraine and cost of living crisis.

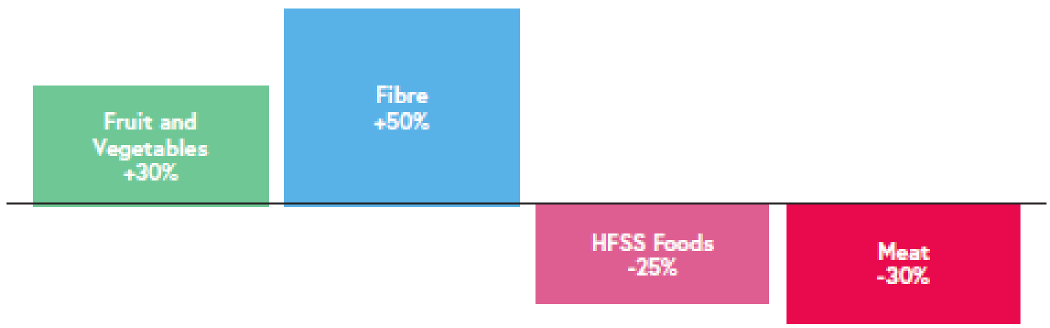
The National Food Strategy lists recommended food system performance metrics for environmental, health and social outcomes as well as system resilience, diet and food environment. It also calls to establish a new National Food System Data Programme that would see government bodies including Defra, DHSC, BEIS and the FSA work together to oversee a huge set of data on health, emissions, food waste, and other metrics. Food businesses could then use this as a guide and to measure progress.

Sustainable Development Goals have stood the test of time and guide us forward. Food systems are often firstly associated with SDG 2 (Zero Hunger) and then SDG 3 (Good Health and Wellbeing), however every single SDG can be linked to the global food security challenge either directly or indirectly e.g. reduced inequalities, no poverty, sustainable cities and communities, responsible consumption and production, climate action, life on land and life below water.

Innovation

The essential nature of food and the interconnectedness of our food systems make food an ideal focus for addressing the Sustainable Development Goals. As with transforming the global food system, transforming the UK food system will require long-term thinking, the disruption of business-as-usual, and investment in schemes without immediate payback. The diagram below outlines changes needed.

Changes needed to meet health, climate and nature commitments



[The National Food Strategy - The Plan]

Greater Brighton will not struggle to find case studies of innovation. Greater Brighton businesses, whether food retailers, caterers, vegetable box schemes, school caterers, farmers, allotment holders, workplace canteens, festival and event teams will all have reportable data about creating these (and other) nutritional changes, ***and*** how they are contributing to a circular economy, or social value, or to tackle climate change.

Food sector growth potential

The European Institute of Innovation and technology (EIT) Food is Europe's leading food innovation initiative, working to make the food system more sustainable, healthy and trusted. From policy and legislation to consumer trends and market growth, EIT Food have combined insights to collate their top 5 food trends for Europe in 2022:

1. **Food systems will play a key role in discussions and decision-making about climate change in the run up to COP27**
2. **More large-scale farms and corporations will begin to adopt regenerative farming practices**
3. **The European alternative proteins market will see further growth in 2022**
4. **The role of young people as food activists and agents of change will increase**
5. **More brands will adopt front of pack environmental labelling in 2022**

The next phase of work can build on this and more partner insights about growth and innovation.

Conclusion

This food scoping set out to investigate existing policy and partnerships in the Greater Brighton city region and offer the basis of a Greater Brighton Food Plan and a clear approach to collaborative work.

Food system transformation will drive sustainable economic development and growth across the city region, if co-ordinated economic development activities and investment are planned at city-region level.

Covid, Brexit, war in Ukraine and the cost-of-living crisis are the most recent challenges but external shocks are increasing and layering up. Mitigating the most immediate harms to populations is the top priority for policymakers, but failure to keep long-term objectives in mind, climate change mitigation in particular, can lead to bad decisions that further embed existing fragilities in economic and social systems. The recommendations from this scoping offer a process to work systematically across these connected agendas, simultaneously, to face the food system challenges and turn them into solutions.

The recommendation from scoping is for the Board to agree to the next phase of work which includes:

1. Identification of a mechanism to co-ordinate action and feed progress into the GB10 pledges
2. Alignment of policies, metrics and action focused on food system transformation by LA areas
3. Budget allocation to create investment plans for infrastructure, business support and training
4. A call to business, education and food partnerships to support food system transformation
5. Seeking partner updates on how food system innovations are being embedded into practice

All LAs in the city region are working on transition plans to achieve resilience and adaptation through Sustainable Development Goals, Circular Economy, Carbon Neutral or Community Wealth Building. Features of a more resilient city region food system include a more secure food supply, lower environmental impacts, transparent supply chains, healthier diets and improved social outcomes. Sharing and combining food system data will reveal where the city region performs well, where targetted investment is required and where there is potential for ambitous food system innovations.

Risks need to be taken to create transformational change and one of those risks is to welcome in new ideas and partners. Food is a positive and generative focus for work as people love food, yet there are also challenges about the impact of the food system, and to the food system, that need to be made visible and discussed openly. Timely coordination of updates and local news cannot be understated. This work already operates within multi level governance structures and requires public engagement and communication. It will be critical to work with East and West Sussex County Councils to align activities with their overarching Climate Emergency and Climate Change strategies and delivery plans.

The existing business, education and food partnerships clearly form the strongest foundation as they cover the breadth of the city region food system and LAs. It is their combined creative potential through the businesses, communities and institutions that will make the next phase of work a success.

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Appendix 1. Potential key assets by Local Authority area

KEY ASSET AREA	Food Partnership	Policy Coordination	Resilience	Food Use & Waste	Procurement	Planning and Housing	Infrastructure	Visitor Economy	Research & Skills	Health & Wellbeing	Food System Showcase	Knowledge Transfer Opportunity
Adur and Worthing	Adur and Worthing Food Partnership	East Sussex County Council, Community Works, Food Power Alliance member	Sussex Resilience Forum	Commercial Food Waste Service 2022, Focus on prevention	Government Buying Standard (GBS) ?	National Planning Policy Framework ?	Port (Shoreham)	Eat Out Eat Well	Worthing College, Tourism, Business, GB MET, catering	HWB Board, Healthy Start, school meals, whole system obesity approach ?	Social Innovation, Food Partnership/ strategy	Circular Economy, networks sharing learning, planning, hospitality
Arun	Arun and Chicester Food Partnership	Developing Food Strategy for Arun & Chichester	Sussex Resilience Forum	Food Waste Collection trial 2021	Government Buying Standard (GBS) ?	National Planning Policy Framework ?	Littlehampton Regeneration ?	Eat Out Eat Well	University of Chichester, Business school, Centre for Workforce Dvpt.	HWB Board, Healthy Start, school meals, whole system obesity approach ?	West Sussex Growers Association, Horticulture	Technology, Employment and skills, Climate change action
Brighton and Hove	Brighton and Hove Food Partnership	Brighton and Hove Food Strategy Action Plan	Sussex Resilience Forum, Emergency Food Network	Community Composting, CE Food Programme, CDP Reporting	BHCC Good Food Buying Standards, Government Buying Standard (GBS) ?	City Plan 1, City Plan 2, PAN 06 and SPD 17	Food Systems Infrastructure included in IDP	Healthy Choice Award (Catering) Bite Sussex	University of Sussex University of Brighton Plumpton College, GB MET	HWB Board, Healthy Start, school meals, whole system obesity approach	Planning policy and procurement policy, Shelter Hall,	Circular Economy, Carbon Disclosure Project reporting
Crawley	Feed Crawley, Crawley Food Bank Partnership	Crawley Food Bank Partnership, West Sussex County Council ?	Sussex Resilience Forum	Hot Bin trial 2021, Crawley Town FC	Government Buying Standard (GBS) ?	National Planning Policy Framework ? Crawley is a Planning Authority	Port (Gatwick) Logistics Space ?	Hospitality v diverse Crawley Eats App Eat Out Eat Well Crawley College	Crawley College, Employ Crawley, Youth Hub	HWB Board, Healthy Start, school meals, whole system obesity approach ?	Skills and employment, Messaging and Trends	Business Imp. District, Employ Crawley Youth Hub (transferable skills)
Lewes	Lewes District Food Partnership	Sustainable Food Places application	Sussex Resilience Forum	Food Waste Collection Service, Compost Club Ltd	Government Buying Standard (GBS) ?	National Planning Policy Framework ?	Levelling Up Capturing the Value of the Catch	Eat Out Eat Well	Plumpton College, land based skills, East Sussex College, Food and Beverage Service	HWB Board, Healthy Start, school meals, whole system obesity approach ?	Fishing and Marine economy, New Agri-Food Centre	Whole supply chain focus, Food system infrastructure
Mid Sussex	Mid Sussex Food Partnership	Mid Sussex Voluntary Action	Sussex Resilience Forum	Food Waste Collection trial 2021	Government Buying Standard (GBS) ?	National Planning Policy Framework ? Northern Arc House Building	Burgess Hill Growth Programme ?	Eat Out Eat Well	Haywards Heath College, Business and Economics	HWB Board, Healthy Start, school meals, whole system obesity approach ?	Business Associations, Bolney Wine Estate	Sustainable Economic Strategy and SDGs
South Downs National Park Authority	Adur and Worthing, Arun and Chichester, Brighton and Hove, Lewes and Mid Sussex	SDNPA Policies, Four Countryside, Policy Managers	Sussex Resilience Forum	There are small-scale local waste and recycling facilities	Government Buying Standard (GBS) ?	National Planning Policy Framework ?	Community Infrastructure Levy	Food and Drink brand Food and Drink awards	Education Team and Grants for schools and colleges, Brinsbury is nearby	HWB Board, Healthy Start, school meals, whole system obesity approach ?	Livestock farming, South Downs Lamb, Visitor economy	Nature Friendly Farms, Live and Work, Branding

Key contacts in each Local Authority area and the South Downs National Park Authority were interviewed and economic strategies and growth plans were studied. Priorities, interests and food system ambitions emerged for each local authority area. Case studies of food system innovation were followed up.

The table was used as a guide for the scoping. There will be inaccuracies that can be refined with partners as more/new information becomes available.

Appendix 2. Social innovation to build resilience

The National Food Strategy **recommended that Local Authorities in England develop food strategies, developed with reference to national targets and in partnership with the communities they serve**.

Evidence of resilience

As a minimum we need Food Partnerships, local food strategies and coordination of policy alignment. A transition to a healthy, sustainable and more equitable food system requires not only strong national policy but also collaborative action between policy makers, businesses and civil society at the local level. The evidence from more than 50 cities, boroughs and counties that now have a local food strategy or partnership is that they can increase food security in the long as well as short term, support improvements in public health and wellbeing, and generate significant investment and innovation.

Evidence of adaptation

•**The findings from** Sustainable Food Cities Phase 2 Evaluation Final Report **show how Local Food Partnerships have been able to pivot to respond with agility to an extended period of national crisis and have moved forward to offer a coherent framework for the transition of local food system.**
•Processes of innovation transfer have helped partnerships to accelerate progress made on areas that are complex, technical and require specialist insight. Food partnerships are creating a common language for change around a highly complex issue that is, itself, in a state of change.
•One of Local Food Partnerships greatest challenges involves points of engagement with the mainstream agri-food system. Opportunities exist to develop engagement focused on sustainability.

Sussex food partnerships working together

Food system planning, food security and food policy work is itself an area of growth and innovation. What is clear from this scoping work is that mechanisms are needed to increase connectivity, knowledge transfer, policy alignment and coordination across the city region.

Cities, towns, boroughs and counties in the UK are establishing cross-sector food partnerships to transform their local food system. Sustainable Food Places are working across all aspects of the food system to solve some of today's most pressing social, environmental and economic issues. Framework of actions and tried and tested approaches for, and from, food partnerships to support more people to get involved in good food, whether for the benefit of themselves and their families, or for the benefit of their wider communities.

Sussex food partnerships connects individual food partnerships as a network of food partnerships. Lewes District Food Partnership, Brighton and Hove Food Partnership, Adur and Worthing Food Partnership, Arun and Chichester Food Partnership, Mid Sussex Food Partnership.

Resilience is essentially about the inherent capacities (abilities) of individuals, groups, communities and institutions to withstand, cope, recover, adapt and transform in the face of shocks. Although capacity may exist, like any partnership this requires resourcing and stability.

Appendix 3. Soil, water, energy and growth

We need to put balance back in our diet and to renew the emphasis on eating natural, whole foods. There is an increasing need to employ more energy efficient methods and water conserving measures.

Evidence of resilience

As a minimum we need policies that protect and encourage regenerative farming and urban agriculture e.g. Community agriculture and food growing, urban farming, allotments and gardens as well as working with tenant farmers and landowners. We need to understand the current technology for environmentally friendly and cost-effective growing, as well as current skills and employment needs.

Evidence of adaptation

•**A move towards a plant based diet coupled with a move to high welfare, non-intensive meat production e.g. prioritising biodiversity, pollinators, soil quality, composting and local food growing.**
•Research findings show that overall, Brighton and Hove City Council's existing allotment provision benefits the city by a minimum of £385,567 each year, alongside food worth an estimated £1.12m.
•**Interventions that channel investment into sustainable, resilient agriculture and food supply chains.** E.g. for hydroponics in horticulture that would include investigating alternative energy systems, irrigation, water supply, water reuse and rainwater harvesting, water treatment and wastewater
•**Collaborations with local colleges, business and education partnership to develop pathways to work** (e.g. Plumpton College, Chichester College Group, (Brinsbury, Crawley, Worthing and Haywards Heath)

Innovative horticulture practices across Arun

The sun and the flat land are what makes horticulture succeed in this area of South East England. **Like any industry, horticulture generates CO2 from its operations. Commercial premises and glasshouses for producing crops require heat, energy and light. Transport of goods through the supply chain generates CO2 through vehicle fuel. Plant machinery also requires energy inputs.**

Waste is the biggest risk to the businesses. Different routes for surplus produce have emerged and offer potential for further development. Supply chain logistics and packaging solutions are highly advanced, and businesses use different energy models to cope with rising costs. The Cool Farm Tool is being used by some growers to make more informed on-farm decisions that reduce their environmental impact**. The key metrics are greenhouse gases, biodiversity and water**. This can be used not only to manage supply chains but also to communicate environmental benefits and engage suppliers. Horticulture is making huge progress with water e.g. water harvesting, but the costs for alternative energy systems remains high and is exacerbated by rising energy costs.

Labour shortages remain a key concern. On top of that that, the living wage (although positive in intent) has had a knock-on effect on the sector. **West Sussex horticultural businesses are ready to recruit people who are work ready with interest, energy and enthusiasm. They are looking to recruit people across a very wide range of skills sets, not only in horticulture and agriculture.**

Appendix 4. Fishing and the marine economy

Coordinating food system activities and investment to create a virtuous circle for the fishing industry, retaining value and strengthening supply and to support sustainable local economic development.

Evidence of resilience

As a minimum we need: Sustainable marine environment indicators and local economic development indicators. There is also a need for Investment and a community wealth building focus. Supporting the long-term future of the fishing sector depends on investment in better infrastructure, strengthened supply chains, new jobs and on fishers learning more sustainable fishing techniques. Ports and harbours need to be modernised and capacity and efficiency increased at processing and aquaculture facilities.

Evidence of adaptation

•**People are already changing their habits and spent some £207m in 2010 on more sustainable fish, with the figure predicted to grow.** For residents to play their part in conserving the marine environment they can buy less fish and seafood and, if they do buy fish and seafood follow these guidelines.
•**A growing partnership is working to restore** Sussex Bay. The aim of the project is to work hand in hand with landowners and farmers, fishers and businesses to enable a coastal economic regeneration alongside nature. The Sussex Bay team is already supporting a strong network of existing projects, partners and funders who are **working together to create ambitious projects in nature restoration, fishing and aquaculture, learning and ecotourism. This links to hospitality and the visitor economy**.

Newhaven: Capturing the value of the catch

New opportunities to secure quotas within the UK's sovereign waters have emerged but the infrastructure is currently lacking to Catch, Process and Retain the value of this fantastic resource. At present, only 5% of fish landed by local fleets is processed in Newhaven and even less is retained. Levelling Up Fund investment will help create a virtuous circle for the town's fishing industry, retaining value and strengthening supply:

- **£6.49 million provides two new fish landing stages for Newhaven's small vessel fishing fleet.**
- **£1.07 million builds a new Centre of Excellence for Seafood Processing in the town including an auction room and marketplace.**
- **£5.38 million stimulates a local market for fish with the addition of a restaurant and community destination at West Quay.** This will include a variety of community and visitor facilities to retain spending in Newhaven for longer.

This is an ambitious project delivering sustainable economic development activities with an employment and community wealth-building approach. It has also translated food system transformation principles into economic development investment plans and attracted funding.

Appendix 5. Food business and the high street

High street food businesses are essential for place making and for creating sustainable communities. Food shops, local supermarkets, cafes, bars, take aways etc. are all now using apps and deliveries.

Evidence of resilience

As a minimum we need to track the diversity of retail and ensure balance to create vibrancy and achieve wider sustainability aims e.g. more walking, more local spend and access to healthier food.

Evidence of adaptation

•**More than a third of businesses across all industries reported taking at least one action to reduce emissions in early October 2021 (ONS).** Business support is required to turn research like this into action e.g. through a circular economy approach and/or through existing networks, events and awards.
•**Pathways to transition to a healthy, sustainable and fair food system can be activated and impacts amplified through taking a circular economy approach**. Currently, a UKRI funded collaboration between University of Sussex Business School, Brighton and Hove City Council and Circular Brighton and Hove is researching the business support ecosystem to support SMEs to transition to the circular economy.
•**Strategic investment plans for food system transformation**, **should be investigated and developed in collaboration with business partnerships**, **Business Improvement Districts, Chambers of Commerce and Business Associations** e.g. the UK Shared Prosperity Fund is still available to help areas transform their high streets into vibrant hubs for future generations and to protect and create thousands of jobs.

Future high streets: Is food your business?

In Brighton's Jubilee Library and in Crawley Library there is a Business and IP Centre (BIPC) with a wealth of free online business resources that can help people to start their own business, continue studying, build professional skills and connect with others. This centre supports entrepreneurs, start-up businesses and small and medium-sized enterprises in Sussex, from that first spark of inspiration to successfully launching and developing a business.

Plans are being developed across the city region that will include e.g. work to support businesses transition to circular economy, reduce carbon emissions and focus on sustainable development. Education Partnerships e.g. Green Growth Platform and Sussex Innovation Centre lead this work and could draw out the food and drink sector focus and enhance existing support.

HISBE Food **is a social enterprise supermarket with shops in Brighton and Worthing and a focus on local suppliers, packaging-free food, values-led brands, and sustainable shopping options**. Since the beginning of the pandemic to Feb 2022, customers in Worthing spent over £600k at HISBE's tills and **HISBE spent over half of that money on Sussex suppliers, staff, and services**. For every £1 spent at HISBE stores, they spend 57p in the local economy. Shifting consumer habits are helping social enterprises like HISBE to expand in challenging times. They want to inspire more people to rely less on the big supermarkets and to make sustainable swaps in their food shop.

Appendix 6. Carbon reduction in viticulture

Very innovative sector presenting opportunity for knowledge transfer to wider food and drink sector. Further support required to help progress recommendations from SDNP Growth impact Assessment.

Evidence of resilience

As a minimum we need carbon reduction metrics and accreditation schemes to support the transition. Wine from the Sussex region has been awarded protected status under the UK's post-Brexit scheme.

Evidence of adaptation

•**The** South Downs National Park Viticulture Growth Impact Assessment **highlights local vineyards ambitions to put together a sustainability plan, get involved in local conservation groups, and increase the size of naturally managed land surrounding the vineyards**.
•**All vineyard managers confirmed they would welcome more dialogue with representatives concerned with environmental conservation in their AONB or National Park**. In the future, there are ambitions plans to use lighter vehicles, more robotics, and electric vehicles. One vineyard has a policy not to burn any plant material, to retain carbon in the field. One vineyard reduces the number of tractor passes and three of the smaller vineyards confirmed that they carry out almost all tasks by hand; in fact, one vineyard does not own a tractor at all. The manager of the largest vineyard in the group is a founder member of the Sustainable Wines of GB Accreditation Scheme (Wine GB, 2020c) and stated that 'the right mindset is now in place at all levels of the company'.

Bolney Wine Estate's approach to resilience

A family run business approaching its 50th anniversary. They are very clear that the principle of sustainable management is crucial to their continued existence and growth as a company. Their "Guided By Nature since 1972" ethos sets the tone for many of their behaviours. With the mild climate and sandstone soil, they spent many years discovering the best variety of grapes to grow in their local eco system. **Vineyard**- As well as mulching, prunings go back into the soil, they also use a biofilter as an effective way of safely treating and recycling water used in spraying. They practise responsible waste management by recycling everything they can. The estate sources materials used in the vineyard from local suppliers wherever possible. **Winery** - They have installed solar panels on the roof of their new winery as well as the main building at the Foxhole site. This generates approximately 30% of the electricity used across the site and, generates up to 25KW of power which is enough to run their disgorging and labelling lines. Any left-over electricity goes to the National Grid for use elsewhere. Waste wine and/or press juice is distilled to be made into Bolney Estate Gin and Bolney Estate Rosso Vermouth. **Packaging** - Their bottles are 100% recyclable. They use recycled paper for the labels, and have moved all their sparkling rosé into green glass, which has 30% more recycled material than flint. The **café, kitchen, wine shop and electric charging points** all contribute to sustainability management. They have Sustainable Wines of Great Britain Certification for the winery and are working to achieve this for the vineyard also.

Appendix 7. The future of livestock farming

Infrastructure needs of farming businesses to enhance sustainability, competitiveness and resilience. Move towards plant based diet coupled with a move to high welfare, non-intensive meat production.

Evidence of resilience

As a minimum we need to support regenerative farming practices and support farmers cluster groups. Particular attention should be given to farmers health and wellbeing at the same time recognising the improvements in sustainability they are making, and the importance of domestic, high-quality, traceable food production throughout the supply chain.

Evidence of adaptation

•Promoting the link between the landscape, environment and livestock is important and allows our visitors to understand the role farming plays in shaping the South Downs National Park landscape.
•South Down's Sheep Society has been running for 125 years. In the ever-changing farming landscape of the South Downs there is one thing that has remained constant across more than two centuries; the presence of the unique Southdown sheep. Central to Sussex farming in past centuries, and especially Lewes, were the tens of thousands of sheep that grazed on the Downs and the Shepherds who cared for their flocks.
•South Downs farmers are working as a group adding weight and scale to their activities and coordinating actions through corridors. Opportunity to encourage use of the Farm Carbon Toolkit.

Lamb farming, making landscape connections

Every stage of the farming process exacerbates the carbon crisis. Some progress can be made through improvements in practice (such as lowering pesticide and fertiliser use or managing animal waste better). Sussex shepherds today raise their sheep mainly for meat; in earlier centuries they raised them mainly for their wool, and for fertilising the arable fields. Sussex shepherds today may be seen (with their sheepdogs) on quad bikes and tractors. Changing the way agricultural land is used will be central to restoring nature and achieving net zero goals.

The good news is that these parts of the food system increasingly benefit from innovations in clean and efficient energy. Supporting farmers health and wellbeing and helping them to develop their own personal resilience is critical at this time. Farmers can reach less affluent and affluent communities**.** It is very difficult for farmers to plan at the moment as there is lot of uncertainty. It is important to recognise the role of small family run farms in local cultural heritage. Farmers are working well together though farmers clusters e.g. the East and South Downs Farmers Group.

Locality is most important as farming is all about locality. Good provenance can be 'branding'. The focus has to be about profitable farming, that is good for both nature and the landscape.

See the 'Meet the Farmer' videos: What is the South Downs Meet the Farmer project? - YouTube;

Appendix 8. Land based skills and training

The centre for training, education and skills development is also a specialist space for rural businesses. It will provide the agriculture, food and wider land management industries with training and support.

Evidence of resilience

As a minimum we need skilled technicians in the land-based sector that have excellent knowledge and confidence of how to apply sustainable practices e.g. fully confident in using the Farm carbon toolkit.

Evidence of adaptation

•**The centre will be completed in 2022 and will provide the agriculture, food and wider land management industries with up-to-date skills training and support for rural businesses post-Brexit.**
•The funding is part of a wider Local Growth Fund of £5.4 million awarded projects aimed at developing the East Sussex economy, improving skills, administered by the South East Local Enterprise Partnership.
•**Opportunity to follow up and collaborate using Sustains' East Sussex infrastructure mapping findings** e.g. infrastructure that farmers wanted access to or to invest in on-site**.** Farmers were very interested in the idea of local food hubs that have capacity to carry out processing, storage, packing, distribution, and selling capabilities. Mobile abattoirs, on-farm dairy processing, and vending machine equipment were also popular ideas. Farmers wanted to collaborate when it comes to logistics so that distribution space is full, and delivery vans are not half empty. Collaboration was seen as important to access more local markets, compete locally with supermarkets, and be more cost and time efficient.

New multimillion Agri-Food centre in Lewes

The two-storey building is collaboratively funded by the college, South East Local Enterprise Partnership (SELEP), Virgin Money and East Sussex County Council and the college is hoping it will create a network hub for knowledge transfer, training and business improvement.
Plumpton College, which is one of the largest college farms in the country, has been investing in improvements to its Farm Enterprise, including farm animal production technologies for its sheep and beef facilities and a new £1.2m pig unit utilising NEDAP technology. The existing dairy unit now includes the latest automated Lely A5 astronaut milking stations and improvements to cow welfare also sponsored by Lely Atlantic. **The project will help to fill the shortage of skills in the agricultural sector and provide the industry with a much-needed boost as it continues to face the challenges of Brexit and the pandemic.**
Principal Jeremy Kerswell said: "Post-Brexit, our sector is going to now rely on a better supply of more highly trained, educated and entrepreneurial entrants. **There is a national shortage of skilled technicians in the land-based sector."**
These facilities will allow the college to meet the skill demand through opportunities that are not currently delivered elsewhere in the South East such as teaching in Agri-Food sectors in butchery and bakery. The extra capacity, utilising the latest technology will allow for better research and innovation for these industries and a **specialist space for rural businesses to connect, stimulate and embed business improvements and policy, and build links with export markets.**

Appendix 9. Food and the Visitor Economy

Urgent need to address catering skills shortage and ongoing challenge of recruitment and retention, and to transfer knowledge from mutually supported economic opportunities e.g. wine and culture.

Evidence of resilience

As a minimum we need to know what actions businesses are taking/wish to take to reduce emissions in the future, simultaneously providing business support to resolve current challenges for the sector.

Evidence of adaptation

•**Staff shortages in the hospitality industry are reaching critical levels**, causing nearly half (45%) of operators to cut trading hours or capacity in order to cope, costing the industry £21bn in lost revenue and causing an estimated £5bn loss in tax for the Exchequer.
•**The city region's strong cultural and visitor economy, and wider hospitality sector was severely impacted by the crisis. Businesses are working hard to rebuild confidence and demand, but recruitment and retention is very difficult.**
•**Young people are not seeing the hospitality sector as a desirable career.**
•Potential exists for mutual benefit and audience exchange, both to attract visitors to try new experiences to increase dwell and enhance experience.
•The UK Hospitality carbon calculator allows hospitality businesses to calculate their current carbon emissions to then produce a report and toolkit that sets out a range of steps and initiatives to enable businesses to reduce their emissions.

Food as a career: recruitment and retention

Potential for better linking together what are thriving contributors to our overall tourism and local experience and demonstrating the potential for mutual benefit and audience exchange.

In order to utilise food tourism as an economic development driver, it is important to encourage visitors to stop, spend and stay longer. Sussex Modern is exploring the potential to generate mutually supported economic opportunity through the union of wine and culture. Retaining visitor expenditure, developing networks with a host of regional stakeholders and the development of intellectual capital are all important. The extent to which food producers become part of the business mix in tourism development initiatives depends on overall business goals, location and target markets.

Opportunity to develop a distinctive city region brand for a range of local food business support. Pioneering platform Shelter Hall attracts and supports caterers with branding and business ideas.

Bite Sussex have re-booted their concept to ensure its relevance for the 2020s. They now host two festival periods bringing together quality producers and local hospitality businesses to showcase the best of Sussex food and drink. They are also recognising the huge contribution that young people make to the industry through the annual BITE Sussex Rising Stars Awards.

Appendix 10. Food hubs for short supply chains

Apply standards or values supportive of sustainability principles to sourcing and how hubs operate. Track and help connect local food producers with customers e.g. food and drink mapping websites.

Evidence of resilience

As a minimum we need to use and promote existing food and drink producers within the city region e.g. SDNPA Food and Drink mapping, Sussex Food and Drink, Taste West Sussex, Discover Seafood, Bite Sussex, Big Barn, Farm Cluster Groups, Plumpton College, Chichester College Group contacts. BigBarn provides a local food map for the UK. The website includes a local food map and a marketplace with over 600 vendors selling over 19,000 products. Big Barn is a Community Interest Company who help people to find and buy, good, safe, accountable food from local sources and in the process encourage more food production to help build healthier, inclusive, sustainable food communities.

Evidence of adaptation

•**Interventions drawing investment into sustainable, resilient agriculture and food supply chains.**
•Examples of nature and people in action, delivering a range of outcomes that support food system transformation.
•Tangible food systems, land-use and nature-positive solutions as well as case studies and available knowledge resources.
•Commitment to food system transformation and the principles for locally led adaptation from key food system and agriculture actors.

Enabling producers to reach local economies

Broadly speaking, food hubs are entities that sit between people who produce food and people who eat it, gathering food from growers and distributing it either to commercial customers or directly to consumers. They can fill gaps in local food infrastructure, help consumers find locally sourced produce, support new forms of food retail, incubate food enterprises, or create a space for community education and action.

Sustainable food hubs endeavor to apply standards or values supportive of sustainability principles to their sourcing and how they operate. They thus provide an appropriate route to market for agroecological and ethical growers and makers.

Sustain asked East Sussex horticulturalists about selling directly to customers. They suggested that they had adequate on-site infrastructure to wash, dry and store produce before sending it off to market. However, many expressed their **interest in local food hubs that can also offer this alongside an ability to help farmers and growers' access local markets and electrified distribution.**

Reports have been written by the Food Research Collaboration about the role of food hubs in the UK, to help people determine whether a food hub is appropriate for their locality and purposes. Food Hubs in the UK: Where are we and what next? - Food Research Collaboration

Appendix 11. Public sector food procurement

Work with procurement teams to use Government Buying Standards for Food and Catering (GBSF). Local policies can be developed to support implementation and maximise social/sustainability impact.

Evidence of resilience

As a minimum we need to report the total quantity of food that is procured (in tonnes) for government-owned and/or operated facilities (e.g. school meals first, then also hospitals, prisons etc.) **and monitor GBSF and local procurement policy** e.g. Brighton and Hove's Good Food Buying Standards

Evidence of adaptation

•Dynamic Food Procurement has the potential to shorten supply chains, reduce greenhouse gas emissions, restore biodiversity and improve food security by sustainably increasing food production through support for regional food producers and suppliers of all sizes.
•Dynamic food procurement can also trigger tangible regenerative local economic impact.
•A positive outcome from the Dynamic Food Procurement pilot for Bath and North East Somerset Council was the amount of data that became available from the digital nature of the supply chain. Granular data right down to product and site level can be analysed and this can also be reviewed at a top-down macro level. The council were able to much more closely understand spend per category per site. The council set the KPIs they wanted to be measured and the managing agent reported against these monthly. A follow up study demonstrated how the carbon emissions associated with the delivery of food were significantly reduced.

Finding a more dynamic way to procure food

For decades, the vast majority of producers in the UK have been unable to supply the public sector market due to a long list of barriers to entry. There has been a general push for more and cheaper food for decades in the UK with devastating consequences. The status quo within the public sector food ingredient market is a highly concentrated, dominant group of a few national distributors supplying the vast majority of all food ingredients. Monopolistic or oligopolistic markets like this provide neither sustainable nor secure position for food producers in the UK.

Dynamic Food Procurement provides an open digital marketplace for food producers and buyers. Implementing the technology behind Dynamic Food Procurement is one of the key recommendations from the National Food Strategy. By removing many of the barriers to entry for suppliers that have prevented the vast majority from ever supplying the sector, a more balanced market can emerge. This will be a competitive marketplace and, as such, efficient production by producers enabling more competitive pricing will be rewarded with greater demand from clients. **This is a healthier, more sustainable economic model than the one that predominates today.**

Brighton and Hove Food Partnership **and** Good Food Oxford **have put in a level 2 bid as a South East collaboration to the Dixon Foundation and DPUK** Dynamic Food Procurement **opportunity. If successful, the next step is to identify anchor institutions to develop project plans further.**

Appendix 12.

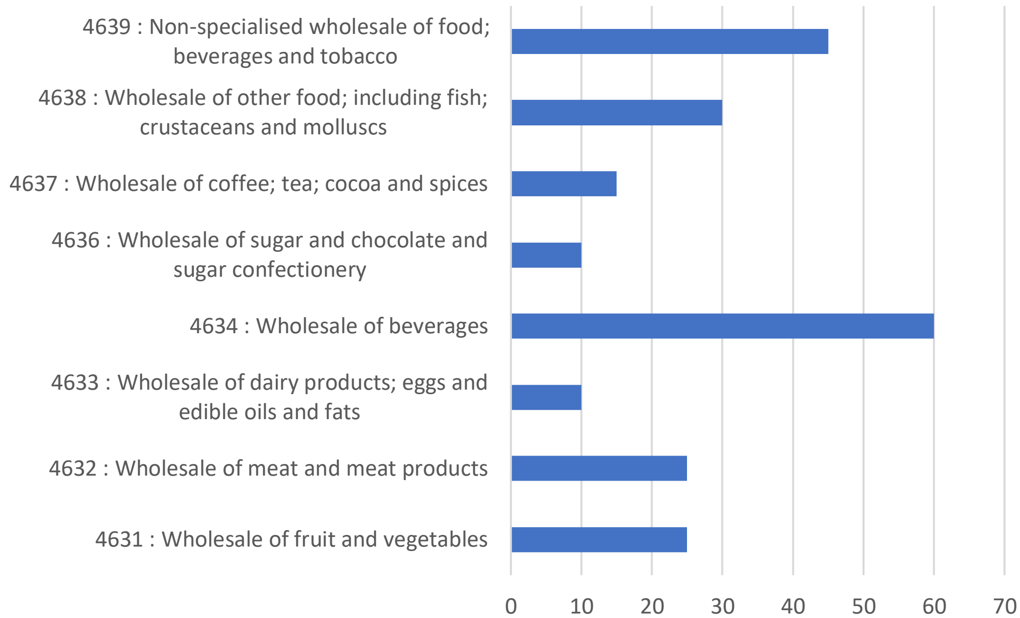
Analysis showing the count, employment and employees of VAT and/or PAYE based local units in customer specified geography for UK SIC 2007 classes in the food industry.

Data from Office for National Statistics (2020) on food sector business types in the Greater Brighton LA areas totalled.

Where the count rounds to zero or data are deemed to be disclosive, any auxiliary variable (i.e. employment or turnover) will be removed (..C).

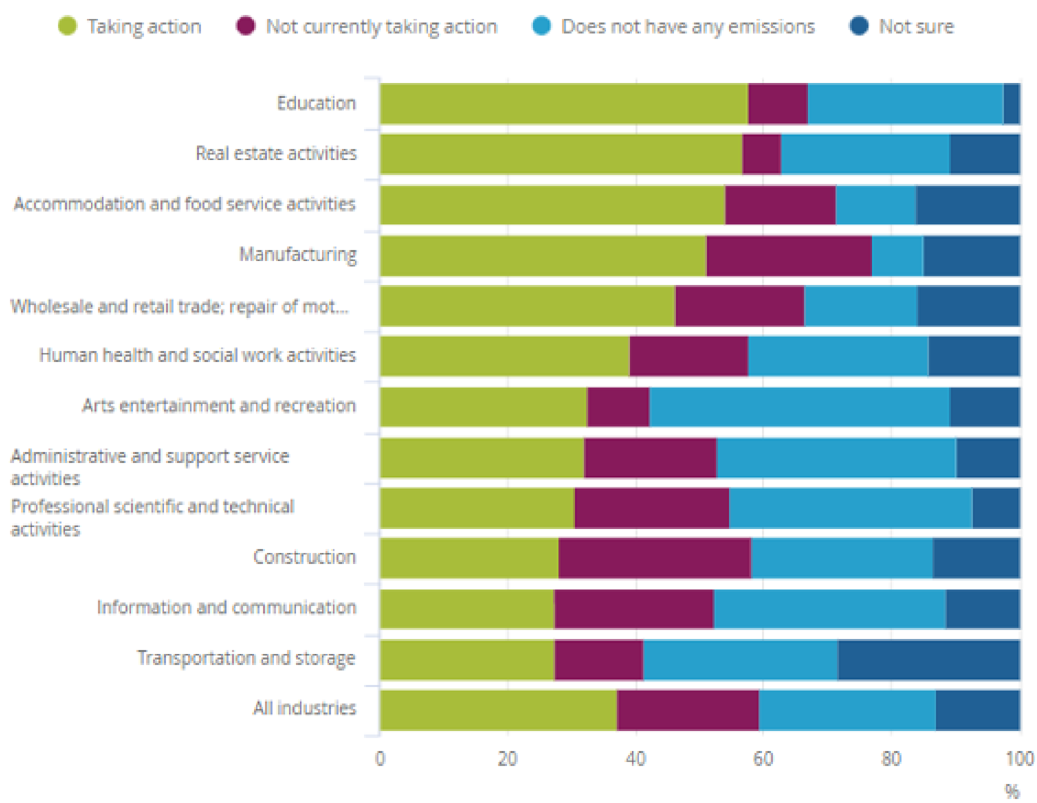
Greater Brighton based Food Sector Business Types	count	employ-ment	employ-ees
0111 : Grow ing of cereals (except rice); leguminous crops and oil seeds	90	346	246
0113 : Grow ing of vegetables and melons; roots and tubers	60	547	488
0116 : Grow ing of fibre crops	5	15	8
0119 : Grow ing of other non-perennial crops	15	281	274
0121 : Grow ing of grapes	5	146	141
0122 : Grow ing of tropical and subtropical fruits	0	..C	..C
0124 : Grow ing of pome fruits and stone fruits	5	59	57
0125 : Grow ing of other tree and bush fruits and nuts	0	..C	..C
0127 : Grow ing of beverage crops	0	..C	..C
0128 : Grow ing of spices; aromatic; drug and pharmaceutical crops	0	0	0
0129 : Grow ing of other perennial crops	0	..C	..C
0141 : Raising of dairy cattle	15	47	29
0142 : Raising of other cattle and buffaloes	15	56	36
0143 : Raising of horses and other equines	70	164	87
0145 : Raising of sheep and goats	70	233	156
0146 : Raising of sw ine/pigs	5	7	4
0147 : Raising of poultry	20	93	68
0149 : Raising of other animals	15	63	58
0150 : Mixed farming	85	252	151
0311 : Marine fishing	55	83	33
0312 : Freshw ater fishing	0	..C	..C
0321 : Marine aquaculture	0	0	0
0322 : Freshw ater aquaculture	5	19	19
1011 : Processing and preserving of meat	0	..C	..C
1012 : Processing and preserving of poultry meat	0	0	0
1013 : Production of meat and poultry meat products	10	142	140
1020 : Processing and preserving of fish; crustaceans and molluscs	0	0	0
1031 : Processing and preserving of potatoes	0	..C	..C
1032 : Manufacture of fruit and vegetable juice	0	0	0
1039 : Other processing and preserving of fruit and vegetables	5	10	9
1041 : Manufacture of oils and fats	0	..C	..C
1042 : Manufacture of margarine and similar edible fats	0	0	0
1051 : Operation of dairies and cheese making	5	39	37
1052 : Manufacture of ice cream	5	17	16
1061 : Manufacture of grain mill products	0	..C	..C
1062 : Manufacture of starches and starch products	0	0	0
1071 : Manufacture of bread; manufacture of fresh pastry goods and cakes	55	444	431
1072 : Manufacture of rusks and biscuits; manufacture of preserved pastry goods and cakes	5	297	297
1073 : Manufacture of macaroni; noodles; couscous and similar farinaceous products	0	0	0
1081 : Manufacture of sugar	0	0	0
1082 : Manufacture of cocoa; chocolate and sugar confectionery	10	55	55
1083 : Processing of tea and coffee	0	..C	..C
1084 : Manufacture of condiments and seasonings	5	9	7
1085 : Manufacture of prepared meals and dishes	5	49	48
1086 : Manufacture of homogenised food preparations and dietetic food	5	15	15
1089 : Manufacture of other food products n.e.c.	20	172	171
1091 : Manufacture of prepared feeds for farm animals	0	..C	..C
1092 : Manufacture of prepared pet foods	5	14	14
1101 : Distilling; rectifying and blending of spirits	10	24	20
1102 : Manufacture of w ine from grape	5	110	110
1103 : Manufacture of cider and other fruit w ines	0	..C	..C
1104 : Manufacture of other non-distilled fermented beverages	0	0	0
1105 : Manufacture of beer	30	137	134
1106 : Manufacture of malt	0	0	0
1107 : Manufacture of soft drinks; production of mineral w aters and other bottled w aters	10	86	85
4617 : Agents involved in the sale of food; beverages and tobacco	20	86	84
4631 : Wholesale of fruit and vegetables	25	114	111
4632 : Wholesale of meat and meat products	25	223	221
4633 : Wholesale of dairy products; eggs and edible oils and fats	10	109	106
4634 : Wholesale of beverages	60	431	428
4636 : Wholesale of sugar and chocolate and sugar confectionery	10	113	111
4637 : Wholesale of coffee; tea; cocoa and spices	15	81	78
4638 : Wholesale of other food; including fish; crustaceans and molluscs	30	300	299
4639 : Non-specialised w holesale of food; beverages and tobacco	45	680	670
4711 : Retail sale in non-specialised stores w ith food; beverages or tobacco predominating	730	16522	16299
4721 : Retail sale of fruit and vegetables in specialised stores	40	175	153
4722 : Retail sale of meat and meat products in specialised stores	65	282	245
4723 : Retail sale of fish; crustaceans and molluscs in specialised stores	10	46	39
4724 : Retail sale of bread; cakes; flour confectionery and sugar confectionery in specialised stores	110	772	744
4725 : Retail sale of beverages in specialised stores	70	265	249
4729 : Other retail sale of food in specialised stores	95	518	497
4781 : Retail sale via stalls and markets of food; beverages and tobacco products	15	65	62
5610 : Restaurants and mobile food service activities	1840	17714	17215
5621 : Event catering activities	225	1932	1887
5629 : Other food service activities	370	3089	3086
5630 : Beverage serving activities	660	8450	8310
Total	**5195**	**56080**	**54413**

Number of wholesale food businesses in Greater Brighton (2020)



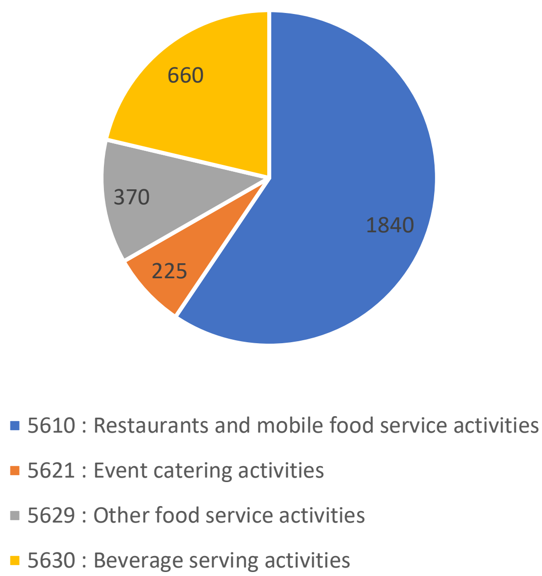
Business Register and Employment Survey: open access

Current business action, businesses not permanently stopped trading, weighted by count, by industry, UK, 4 to 17 October 2021



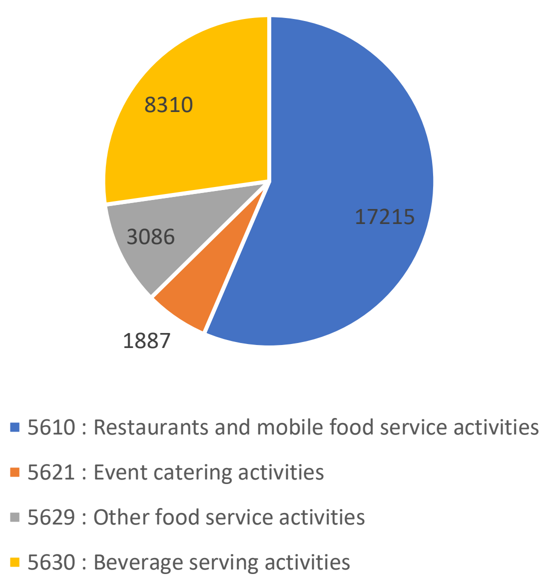
[UK business action on net zero and historical energy use - Office for National Statistics (ons.gov.uk)](https://www.ons.gov.uk)

Accomodation and food: Food and beverage service businesses in Greater Brighton (2020)



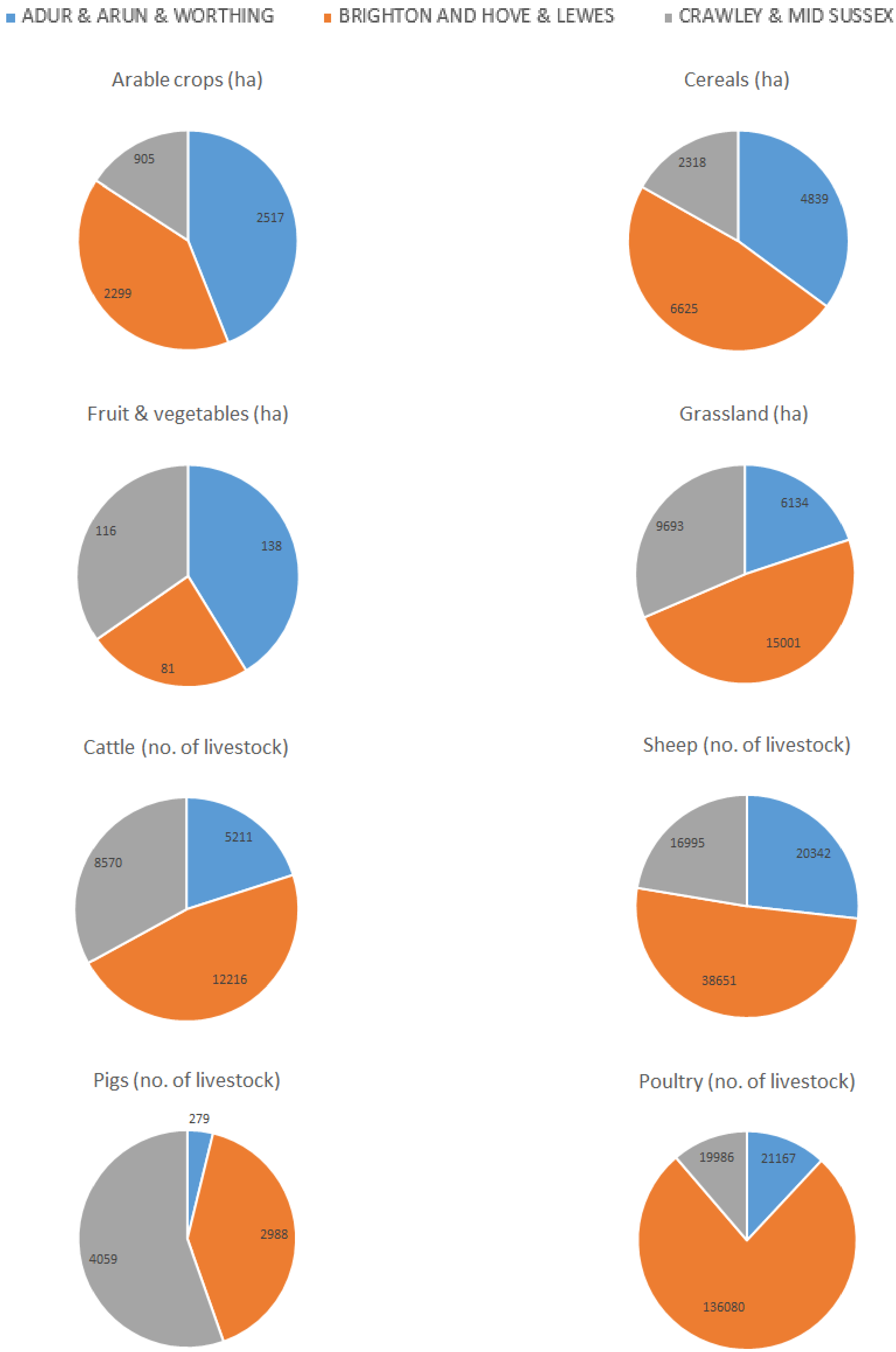
ONS Analysis showing the count, employment and employees of VAT and/or PAYE based local units in customer specified geography for UK SIC 2007 classes in the food industry

Accomodation and food: food and beverage service employees in Greater Brighton (2020)



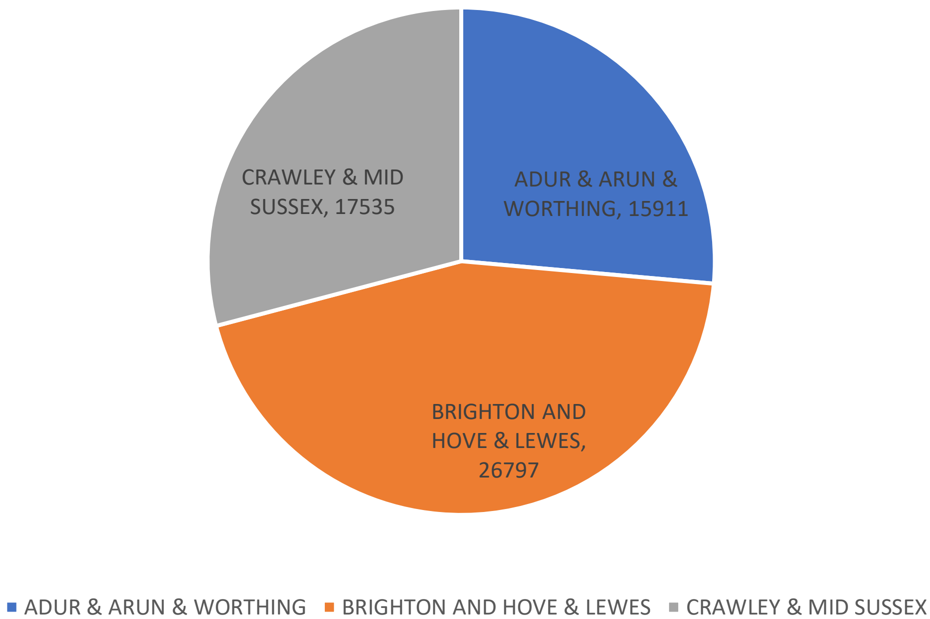
ONS Analysis showing the count, employment and employees of VAT and/or PAYE based local units in customer specified geography for UK SIC 2007 classes in the food industry

Farmed area by hectare: Crop areas and livestock numbers on agricultural holdings (2016)*



[Structure of the agricultural industry in England and the UK at June - GOV.UK (www.gov.uk)](https://www.gov.uk)

Total farmed area on agricultural holdings by Local Authority clusters (2016) in hectares*



Structure of the agricultural industry in England and the UK at June - GOV.UK (www.gov.uk)

Local Authority breakdown for the agricultural labour force on commercial holdings (2016)*

Local Authority	Farm labour - number of people						
	Farmers, partners, directors and spouses full time	Farmers, partners, directors and spouses part time	Salaried managers	Regular workers full time	Regular workers part time	Casual workers	Total labour
ADUR & ARUN & WORTHING	103	104	78	351	49	242	927
BRIGHTON AND HOVE & LEWES	168	200	26	126	125	40	686
CRAWLEY & MID SUSSEX	173	227	35	88	90	113	726
COMBINED LA AREAS	**444**	**531**	**139**	**565**	**264**	**396**	**2339**

Structure of the agricultural industry in England and the UK at June - GOV.UK (www.gov.uk)

*Data for 2021 wil be available in the next couple of weeks but was not published on the website by the time this report had to be submitted. These charts can be redrawn using the 2021 data and then compared to see changes over time.