



UNIVERSITY OF
LEICESTER

**Institute for Environmental Futures,
Institute for Space, & School of Business**

Leicestershire Food and Land Use Summit 2025

Meeting Report

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Leicestershire Food and Land Use Summit

Thank you for attending the Food and Land Use Summit, supported by KNOWNET. The day was packed with fascinating insights from our speakers and inspiring discussion among the delegates.

We are faced with the urgent challenge of building a resilient and sustainable food system in the face of a changing climate, environmental degradation and geopolitical insecurity. National and international agreements demand the land use sector delivers dramatic reduction in its greenhouse gas emissions, contributes to nature recovery, carbon sequestration and cultural services, in addition to food production. The Dasgupta Review and the UK National Ecosystem Assessment highlight that land managed for multiple outcomes can deliver higher long-term value than that managed for single uses (Clapp & Fuchs, 2009; Turner, Daily, & Ehrlich, 2007). To achieve ambitious national targets and adapt to new global challenges, land use in England must transform.

The UK policy landscape must adapt to match the scale and pace of change demanded of the food and land use system. Land use strategy must be comprehensive, agile and enduring. The diversity of UK landscapes means multifunctionality cannot be delivered with a one-size-fits-all approach; transformation must play to the strengths of local land. To achieve a national strategy which responds to and meets the needs of communities, the knowledge and experiences of local stakeholders must feed into policy design. Through gathering key stakeholders in Leicester, Leicestershire and Rutland, the Food and Land Use Summit offered the opportunity to build a local network, foster knowledge transfer and think creatively about the pathways for the Midlands region to meet its potential to contribute to regional and national land use transformation.

University of Leicester is a hub for research spanning multiple disciplines, from the social sciences to space. Bringing together expertise the University of Leicester School of Business, Institute for Environmental Futures and Institute for Space with Leicester City Council, and Leicester County Council with Making Space for Nature, Good Food Leicester and Leicester's Good Food Plan, allowed the entire food value chain to be evaluated. This multidisciplinary approach to mapping the food value chain considered local systems in Leicester and Leicestershire and their place in the national policy landscape and revealed innovative strategies to bolstering food security while reducing its environmental impact.

The Food and Land Use Summit marked the first time a diverse network of stakeholders in Leicestershire have come together to bridge the gap between research and practice, identifying practical, evidence-based strategies to strengthen the food value chain. A key focus of the summit was the role of Space technologies—particularly satellite-based Earth Observation—in supporting land management and monitoring food value chains. Increasingly, downstream applications and services using remote sensing are providing accurate data to inform agriculture, land use, and food system decisions. This data can be sourced from open platforms, such as the European Space Agency's Copernicus programme, or through commercial Earth Observation providers. In the case of commercial data, we are especially interested in Public-Private Partnerships, such as the collaboration between the UK Government and Planet Labs (as seen in Wales), which aim to reduce barriers to adoption and create inclusive opportunities across the sector.

The potential for the Midlands and its place in the wider land management and food policy landscape has been highlighted during the Summit, and a framework has been set out for its role as a testbed for UK policy development.

Programme of the day:

The event was opened by:

- **Professor Richard Thomas**, Pro-Vice Chancellor for Research and Enterprise, University of Leicester;
- **Professor Mat Hughes**, Dean of Research and Enterprise, University of Leicester College of Business.

Keynote speeches were given by:

- **Emma Piercy**, Head of Climate Change and Energy Policy at the Food and Drink Federation;
- **Dr Nada Saidi**, Head of Analysis and Research at DEFRA's Land Use Team;
- **Georgie Barber**, Food Farming and Countryside Commission
- **James O'Brien**, Team Manager in Environment Policy and Strategy at Leicestershire County Council, and Chair of the LLR LNRS Steering Group.

The afternoon session, following lunchtime networking, commenced with a discussion panel moderated by Georgie Barber, Food Farming and Countryside Commission. Panel members spanned research, local and national business, city and county councils and included:

- **Professor Heiko Balzter**, Director of the Institute for Environmental Futures;
- **Alex Gray**, Curriculum Quality Lead and Programme and Project Lead, Brooksby College;
- **Joe Stanley**, Head of Sustainable Farming, The Allerton Project;
- **Gavin Fletcher**, Sustainable Food Partnership Coordinator, Leicestershire County Council.

Delegates then dispersed into groups to discuss the 'Four Corners' principles of achieving Net-Zero goals:

- Productivity, profitability and scalability,
- Sustainable land management policies and space
- Farming and supply chain
- Food production health and quality

Place-sensitive design for comprehensive land strategy

European land management and environmental policies place a strong emphasis on multifunctionality, sustainability and resilience in land use, and aims to reconcile competing demands for food production, climate mitigation, biodiversity and conservation and socioeconomic development (European Commission, 2020; European Environment Agency, 2021). UK policy is similarly ambitious, with the Environmental Improvement Plan (2023) and the Net Zero Strategy serving as interdependent frameworks targeting climate action, food security, public health and nature recovery (BEIS (Department for Business, Energy & Industrial Strategy), 2021; DEFRA (Department for Environment, Food & Rural Affairs), 2023; Folke, Hahn, Olsson, & Norberg, 2005). Cross-disciplinary research points towards need for localised agency, capacity-building, and trust in polycentric governance in order to achieve transformative change (Ostrom, 2010; Duit & Galaz, 2008; Stirling, 2015). Yet, there remains misalignment between local to national policy strategy, fragmentation, and centralised decision making which hampers operational delivery at the local level (Fischer, et al., 2019; Mazzucato, 2018).

Perspective from the Food and Drink Federation

Engaging food and drink manufacturers is imperative for industry resilience to climate change, resource insecurity and societal vulnerabilities. The manufacturing sector spans the entire network of the food system and contributes significantly to its environmental impacts of food systems. The sector is sensitive to insecurities induced by climate, economic, social and geopolitical stresses. The Food and Drink Federation (FDF) supports the industry through its engagement with policy, and as the largest cross-sector membership body for food and drink manufacturing, is a key stakeholder in food and land use transformation.

In October 2030 the FDF released its flagship sustainability programme, *Ambition 2030*, which brings supply chain partners together to take a long view to tackling climate and biodiversity challenges. The strategy has five pillars overarching current and future environmental, governance and systems challenges in sustainability. In delivering the ambitions set out under these pillars, the FDF will play a leading role through advocacy, guidance and support for its member organisation, and stimulating cross-sector collaboration.

The Department for Business, Energy and Industrial Strategy (BEIS) has set out in its *Industrial Decarbonisation and Energy Efficiency Action Plan* the current barriers to decarbonisation in the food and drink sector, and 'MaxTech' pathways as a roadmap to overcoming them. In the short term, costs of renewable energy sources, uncertainty and lack of knowledge within the sector are projected to represent challenges in the sector's development. In the medium to long term, slow technology replacement cycles, uncertainty about supply of alternative fuel sources, and the potential for product quality compromise are expected to curb progress towards the sector's decarbonisation.

In their remit to foster relationships with industrial, non-profit, governmental and regulatory bodies, the FDF aim to engage the sector from **farm-to-fork** to enable whole-chain reduction in emissions, waste and impact. Industry initiatives such as the WRAP GHG emissions targets, the Food Data Transparency Partnership, and the Nature Markets Dialogue are built into the FDF farm-to-fork framework which will inform action from farmers, imports and consumers.

The farm-to-fork framework takes a **systems-focused** and collaboration-driven approach, which is essential to reap the biggest rewards for the sector, of a more secure, less impactful food system. Clear alignment in policy is needed to facilitate this action, supporting actors across the chain. The rights and choices of consumers must be championed as the key stakeholders in the food and drink sector; rural communities must be supported through effective flow of finance from the private sector to farmers. To appropriately manage regulation on imports, robust agreements on trade and reporting on a regional to international level must be secured. To bolster alignment across the system, an overarching data reporting structure should be established in order to accommodate interdisciplinary, nature-wide approaches to data gathering.

While barriers remain to achieving a more sustainable food and drink industry, a clear and comprehensive policy foundation could lay the path to reap substantial rewards.

Perspective from Defra and the Land Use Consultation

Land plays a vital role for people and nature, and is often multifunctional, providing essential services for the environment, culture, and the economy. This diversity of roles frequently races conflicting priorities and shifting tides, meaning land use must adapt to ensure long-term social, economic and environmental resilience. Under the pressures of a changing climate and geopolitical landscape, land use across England must function to reduce and reverse degradation of the natural environment, contribute to carbon sequestration, and provide a sustainable and resilient food supply. The land use consultation represents a catalyst for a national conversation about land use. This consultation aimed to gather feedback from stakeholders in English land use and identify the data needs and challenges that will need to be addressed to aid this transition. The consultation addressed policy challenges for land use change under four themes: aligned incentives, joined-up decisions, accessible and high-quality data, and skills.

Defra are consulting on the Land Use Framework which will develop and support delivery of a shared vision for a land use transition which supports economic growth and nature recovery. The scale of transition involves at least 1.6 million hectares of land which whose function must change by 2050. To inform strategic spatial planning, Defra have conducted spatial analysis, aiming to facilitate co-design of multifunctional landscapes which play into the strengths of the land. Tension mapping considers climate change impacts and are thus responsive by design, such that decisions can be made with a long-term view. The Land Use Framework will ultimately represent a toolkit to support national food security.

Perspectives from local action in policy co-design

To implement changes in the food system, from land use to consumer purchases, national policy must be implemented at a local level. Local actors must be mobilised to deliver effective land use decisions and enable national resilience. To facilitate this local to national pipeline and ultimately meet national goals, there are multi-level challenges – we need to engage citizens, reflect the needs and priorities of local people, and deliver effectively for public value.

To achieve successful design and implementation, policies must be iteratively scoped, tested and adapted to optimise and customise to the local setting. In the long term, policy frameworks must be sufficiently agile to adapt to changing priorities and environments. This has been tested in practice in local pilots in Devon and in Cambridgeshire to test how the Land Use Framework will operate. These pilots are being delivered with local communities and leaders to test a prototype land use decision support tool. The pilot schemes have highlighted themes in the needs of local communities and land managers, who demand agency, diversity and resilience in the food system.

The pilots have shown that for effective policy design, stakeholder engagement must be proactive, and points of conflict with stakeholders should be raised early. In their response to land use policy, the importance of expert facilitation and strong commitment from leadership is essential to generate trust in communities, and breakdown silos. There is a strong drive for use of detailed data to inform performance, and while this is abundant, interoperability of this evidence remains a challenge.

In Leicester, Leicestershire and Rutland, the Local Nature Recovery Strategy (LNRS) guides the mapping for biodiversity and nature recovery, now and in the future. The LNRS aims to increase area dedicated to conservation and green space in urban environments, while supporting local food systems, increasing monitoring, biodiversity and ecosystem connectivity and utilising nature-based solutions. Mapping in Leicester, Leicestershire and Rutland has revealed 35% of land area has potential to be transformed to benefit nature and the environment. The process of designing the LNRS has been collaborative and evidence-led, and requires engagement from actors across the chain, from partners to end users. It involves multi-stakeholder partnerships, committing to transparency, inclusivity and clear communication among industry, non-profit and governmental organisations, and the public who contribute multi-disciplinary expertise to mapping exercises, surveys, and reviewing existing strategies.

Challenges and opportunities in local to national land use strategy

Multi-stakeholder discussion has revealed several key themes in the challenges and opportunities in facilitating local to national land use transformation.

Knowledge fragmentation and sectoral silos. This lack of coordination, both in education and across the sector, results in narrow specialisation and limits the capacity for joined-up action. To achieve truly multifunctional landscapes, practitioners must have a holistic understanding of land function and its management. There is a need for boundary-spanning institutions that facilitate collaboration and can deliver systems-thinking, transdisciplinary curricular and research (DEFRA (Department for Environment, Food & Rural Affairs, 2023; Ostrom, 2010; Lidskog, Sjödin, & Wiman, 2015).

The discontinuation of EU structural funds has created instability post-Brexit. Replacement schemes like the UK Shared Prosperity Fund lack the scale, duration, and delivery mechanisms of their EU equivalents, impeding strategic investment and local planning (Midlands Engine, 2023; Dax & Oedl-Wieser, 2020).

Lack of trust in multi-level governance has been fostered by a disconnect between top-down national policy and the local lived experience. Local authorities report challenges in interpreting and applying national schemes due to insufficient autonomy, capacity, or recognition. Restoring trust will require institutionalised channels for co-production and shared accountability (Ostrom, 2010; Duit & Galaz, 2008; Bulkeley & Newell, 2015).

Policy frameworks are complex, incoherent and unresponsive to dynamic social and environmental contexts. Overlapping reporting frameworks, inconsistent metrics and fragmented delivery metrics represent barriers to entry for small organisations, landowners and community groups. There is a need for streamlined, interoperable systems that enable adaptive management and recalibration based on emerging data and community insights (DEFRA (Department for Environment, Food & Rural Affairs), 2023; Ostrom, 2010; Hegger, Lamers, Van Zeil-Rozema, & Dieperink, 2014; Walker, Holling, Carpenter, & Kinzig, 2004).

Metrics, Data Infrastructure, and Accountability. As echoed by DEFRA representatives, "you can't act on what you can't measure." Investment in interoperable data systems, resource mapping, and monitoring frameworks is critical. These systems underpin evidence-based decision-making and ensure transparency, learning, and accountability (DEFRA (Department for Environment, Food & Rural Affairs), 2023) (European Environment Agency, 2022; Janssen, Anderies, & Ostrom, 2017)

Understanding the Political Economy of Food Systems in order that structural imbalances across the food value chain - from production costs and market access to procurement and public health – can be better understood and addressed. Policy should incentivise sustainable production, equitable distribution, and resilient local economies (IPES-Food, 2017; Clapp & Fuchs, 2009).

The case for a Spatially Integrated Land Use Strategy

In patchwork landscapes, land use faces competing functions, conflicting priorities and regulatory challenges. At the local level this can stimulate resistance to adopting true multifunctionality and can foster fragmentation between local practice and national strategy. Policy design and implementation is not meeting the needs of practitioners on the ground who face a diversity of challenges to match the diversity of the food and agriculture sector. To unlock the potential of true multifunctional land use and overcome sectoral fragmentation, it is essential that spatial intelligence, cross-sector governance and local co-design are exploited.

A growing body of research, including work by Natural England, Defra and the UKIR-funded Future of UK Treescaping, supports two dominant approaches to framing multifunctional land transformation

1. **Systems-Based Land Stewardship**

Landowners act as stewards managing landscapes for multiple, long-term public goods — including climate resilience, biodiversity, water, and community well-being (Ostrom, 2010) (Folke, Hahn, Olsson, & Norberg, 2005).

2. **Spatially Enabled Planning and Incentives**

Policy frameworks and funding models are designed around landscape typologies and geospatial priorities, ensuring that interventions are tailored to local conditions and community needs (European Commission, 2020).

Leicestershire and The Midlands as a Living Laboratory for National Land-Use Frameworks

Achieving net zero and nature-positive outcomes depends on spatial integration, coordinated governance, and community-driven innovation. Unlocking the full potential of England's patchwork landscape requires local-level engagement, and thus policies that are locally informed, nationally supported, and tailored to the land's many overlapping functions (Walker, Holling, Carpenter, & Kinzig, 2004; Pahl-Wostl, 2009). By embedding multifunctionality and local leadership into national policy frameworks, the UK can align its food security, Net Zero and nature recovery ambitions more effectively, especially in rural and peri-urban areas which are land types which have significant potential for high-value multifunctionality.

The Midlands region is a highly diverse patchwork of habitat types and landscape uses. It contains an established and diverse network of practitioners, local councils, research institutes and innovation clusters. The Midlands represents a representative cross-section of the wider UK landscape and a microcosm of the food and agriculture sector and thus provides ideal conditions for real-world policy experimentation (Barca, 2019; Midlands Engine, 2023). As demonstrated by Defra land use pilot schemes, regional infrastructure can offer a valuable resource to scope and test for policy optimisation. This process of policy co-design and developing adaptive strategies could offer scalable blueprints for the UK transition towards land use systems that serve climate, nature, food and community needs simultaneously.

The Food and Land Use Summit has strengthened existing relationships and cultivated new networks and signifies the strength in stakeholder alignment and enthusiasm for food and land use transformation. The engaged community and diverse landscape make the Midlands not only a practical pilot region, but a model for collaborative and resilient land governance (DEFRA (Department for Environment, Food & Rural Affairs), 2023; Scoones, 2020). This integrated approach positions the Midlands as an optimal Living Lab, where multifunctional land use policies can be flexibly tested, refined and scaled; rebuilding trust and bridging local realities with national ambitions for sustainable land management (Scoones, 2020; Ostrom, 2010).

A strategic view of the Leicestershire Food and Land Use Summit 2025

Dr Bernhard Strauss & Dr Pantea Lotfian, Camrosh Limited

Context

In this section we (Camrosh Ltd., a strategy consultancy with a focus on the intersection of technology/market analysis and policy design) were invited to share some of our observations and perspectives on potential ways forward to put Leicestershire on a trajectory toward more sustainable land use and practices. Attending the summit and hearing about the different opportunities and challenges on that path left us with a lot of food for thought (no pun intended), and could not help but ask ourselves, “what next, and how?” This question arose mainly out of the tension we experienced at the summit between on the one hand, numerous national and Leicestershire specific initiatives aiming at future land use change, local data and activities, and on the other hand, a sense of being overwhelmed with where to start building that “living laboratory for national land use frameworks” mentioned in the previous section. In particular, in the face of the numerous challenges that seem to currently hold back more impactful and quicker decision-making to achieve that goal. The need for more coordination and integration of what we already know and of what is already happening in Leicestershire was expressed by several other participants we have listened to and discussed with on the day. However, on what evidence and data should any strategic planning be based, and who would be the most relevant stakeholders to engage with for implementing such plans in a collaborative manner? Most importantly, what needs to be *coordinated* in a strategic manner to achieve greater and quicker impact, while at the same time enable the Leicestershire agri-food sector to thrive?

Despite calls for more and better data, sometimes voiced at the summit with the concern that without that, no decision-making would be possible, we are proposing in this section that sufficient information might already be available for making strategic and impactful decisions to advance land use change in the county. These might not be perfect, but when supported by local domain expertise, a good understanding of stakeholder needs, and combined with some old-fashioned common sense, will be a good starting point.

In the following we provide some suggestions to a few selected questions that emerged for us during the summit as essential to be answered when wanting to implement land use change in Leicestershire. These suggestions are based on our own observations at the summit and take some of Leicestershire’s main characteristics of its ecology and agri-food system into account using a very limited number of recent documents as information sources. Due to the time and resource limitations of our contribution in this report, these ‘recommendations’ can only be top-level, incomplete, and based on a narrow knowledge base of Leicestershire data. We start each section with a question, present some of the more well-established facts, then point out some opportunities and challenges along the way, and make suggestions that we can see feasible, from an outside perspective, and with all their limitations.

Given current land use in Leicestershire, who needs to be primarily engaged with to drive land use change?

Over 80% of land in the East Midlands of which Leicestershire is part of is currently used for agriculture with a significant proportion of arable and livestock farms (Department for Levelling Up, Housing and Communities, 2022). This is greater than the 2024 UK average of around 70%, which makes the agriculture sector in Leicestershire a key player in any future efforts to change land use in the county (Department for Environment, Food & Rural Affairs (DEFRA), 2025). In addition, the average farm size in 2023 was 103 hectares, which is larger than the English average of 88 hectares. Despite a large proportion of livestock farming, most of agricultural land is mixed-use, including arable crops, grazing and horticulture (DEFRA (Department for Environment, Food & Rural Affairs), 2024).

These basic facts suggest that land managers, and landowners of large farming businesses in Leicestershire will have a crucial role to play in any journey toward more sustainable or regenerative land use. Above figures also mean that currently most of Leicestershire land is utilised for some form of production for the economy, that the remaining land of high ecological value is very limited, and that increasing it will require considerable longer-term and joint efforts.

The *Biodiversity Quality Assessment Study for Leicestershire, 2020/2022* has analysed Leicestershire land using a 1km square ecological quality assessment approach grouping land into several ecological land type categories (such as arable land, improved grassland, built environment, ridge and furrow, small grassland fields, among others) and associated them with a bio-score that indicated “ecological value” in terms of biodiversity and other functions within the ecosystem. The study found that only less than 1% of land is of the highest ecological value. Given this starting point, the question is what specific type of land use change would be most effective for lifting lower- to intermediate- ecological value land to higher ecological value forms of land use.

One such transition suggested repeatedly at the summit would be the wider use of regenerative forms of agriculture. However, this needs to be balanced with the viability of the Leicestershire agri-food sector, and financial support for farmers to invest in that transition is currently limited.

In July 2025 the *Leicestershire, Leicester and Rutland Local Nature Recovery Strategy* was published. Its overall goal is to increase the area of high biodiversity land of high ecological value, and the promotion of sustainable and local agriculture. The following specific aims are stated in the strategy:

1. Increase the area and diversity of land and water managed for wildlife in Leicestershire, Leicester, and Rutland.
2. Increase biodiversity by improving the ecological condition (habitat quality) of existing areas for nature conservation.
3. Re-instate natural processes and utilise Nature-Based-Solutions to support nature and climate resilience.
4. Protect and enhance green and blue spaces within urban habitats.
5. Promote sustainable agriculture and support local food systems.

6. Improve ecological connectivity by establishing coherent and resilient ecological networks at scale.
7. Reduce major pressures and threats to nature including Invasive Non-Native Species control.
8. Improve our understanding of the State of Nature and actively monitor habitats/species change over time.

Very clearly, these aims need major input, collaboration, and incentivisation of those who manage and own most of the land in Leicestershire, namely large agricultural businesses. While the strategy document gives a good summary of what the state of nature in Leicestershire currently is and who relevant stakeholders are, it is less clear about concrete opportunities for implementation by connecting with the agri-food supply chain and initiatives that might commercially incentivise change towards the set goals.

The *Leicestershire Regenerative Produce Report (2023)* considers the following produce that are currently already being produced in Leicestershire as suitable for regenerative low carbon agriculture:

- Fruit & vegetables: potatoes, carrots, onions, cabbage, apples, squash, beetroot, spinach
- Dairy & meat: beef, pork, chicken, lamb, milk, eggs, cheese.

Different initiatives in the county have studied the feasibility and potential for wider establishment of regenerative farming in Leicestershire to replace current intensive farming practices. However, there is unanimous agreement among supply chain players including regenerative agriculture specialists that although the potential impact of regenerative practices on soil and environmental health has a high potential, the scale of current production under these practices would not be sufficient to cover full supply into large food producers and retailers in the region (*Leicestershire Regenerative Produce Report (2023)*).

- *Hence, there is a need for further research into how to scale regenerative practices and for gaining a better understanding of their impact on prices along the supply chain to enable achievable outcomes with real impact.*
- *However, one big challenge we have heard voiced repeatedly at the summit, is a lack of necessary skills and educational and training opportunities to acquire the necessary expertise to establish and manage regenerative practices.*

In addition to strategic decisions concerning farmland directly, initiatives in urban areas are likely required to support land use in various indirect ways.

Leicester is the largest city in the East Midlands and a central urban zone in the county. According to the *Leicester Food Plan (2021–2026)* three-quarters of Leicestershire residents live in the 40% most deprived urban areas in the county, indicating significant urban land use for residential, commercial, and institutional purposes. The city's urban fabric includes homes, schools, hospitals, markets, and a strong food service and retail sector (indoor and outdoor markets, food shops, etc.). As part of the waste collection services by the city council, food waste is recycled. Around 70% of household food waste is processed through mechanical methods separating organic waste which is composted and either used to generate electricity for the national grid or used in land remedial

projects. Currently, Leicester city is developing a Waste Management Strategy which must address a considerable reduction in the impact of food systems and food choices in Leicester and the rest of the county by:

- Encouraging the population to move to a more sustainable diet
- Significant reduction in energy and water use in food and drink manufacturing
- Reduction of food and packaging waste at all stages of the food cycle
- Reduction of food transportation carbon emissions

Besides such public services-led initiatives, a main contribution of urban areas where most of the local consumers live could be behavioural change of consumers in terms of their food choices. Ideally, helping to generate a local consumer market for more sustainably produced food. Among other initiatives, ongoing educational activities led by the council can have an impact on shifting current food choice habits in the longer-term. In addition, local food businesses need to be incentivised to focus on reduction of energy use and increasing resource efficiency while food miles can be reduced through more local production and direct use of local produce (*Leicester's Food Plan, 2021-2026*)

All these changes might need to be supported further through changed consumer behaviour with the aim to create local market pull.

- *However, it is well known that educational campaigns are often insufficient to drive behavioural change as consumers are mostly led by habits, taste, and price when making food choices. Therefore, land use change in Leicestershire might be more efficiently advanced by focusing on where the change should happen, namely on the land itself.*

Hence, we believe that the following might need to be pursued with more urgency to drive land use change in the county:

- *Motivate and support large farmers/land managers and landowners to coordinate efforts in ecologically valuable land use change. This needs to be done considering where their land is located within the local ecosystem and what it currently produces. (Challenges: lack of collaborative culture and commercial incentives, distrust toward government policy).*
- *Foster collaborative efforts of large landowners towards increasing the ecological value of their land because change on a larger area can make bigger contributions quicker to overall land use change than many smaller, disjointed initiatives. (Despite they still being important). This requires a deep understanding of concerns and motivations of landowners and how best to incentivise them.*
- *Even seemingly small changes on a large farm such as rewilding field margins and adding hedgerows at land boundaries among others can have important functions for example as ecological corridors connecting with adjacent land of higher ecological value. Hence, analysis of agricultural land across the county where such simpler changes would make a valuable ecological contribution would be necessary to then engage with the relevant stakeholders regarding specific changes that would be beneficial for the specific ecology of the farm and its adjacent land.*

What actions can businesses in the Leicestershire food and drinks supply chain take to promote a market-driven increase of regenerative and sustainable agriculture in Leicestershire?

Another stakeholder group that attended the summit were representatives of the food and drinks industry. As the food and drinks sector is complex and highly heterogeneous involving numerous players, the challenge is how best to induce systemic change while maintaining commercial viability of businesses. There are already explored opportunities for action to promote market-driven levers to increase the demand for regenerative and sustainable agriculture produce. Some examples are:

- Establishing long term procurement relationships to overcome market access barriers and generate more consistency in demand. This is where large public customers such as hospitals, schools and other public procurement can lead by example (as some have attempted in the past) (*Leicestershire Regenerative Produce Report (2023)*)
 - Enter into multi-year purchasing agreements with regenerative producers, giving farmers confidence in adopting longer-term land-use changes.
 - Develop local sourcing contracts specifically with farmers that are transitioning to regenerative systems.
- Redesign supply chains for local sourcing (*Sector profile: Agri-food and Drink in Leicester and Leicestershire*).

There are around 200 food and drink manufacturing business in Leicestershire with a high number of them producing bread, pastries, snacks and meat products. However, the inputs to these manufacturers are mainly imported into the county through intermediate suppliers. To redirect this consumption of raw materials for food manufacturing to regenerative produce from Leicestershire would require among other activities (*Sector profile: Agri-food and Drink in Leicester and Leicestershire*):

- Auditing and shortening of supply chains to be able to prioritise local, regeneratively produced ingredients (and make this information accessible and visible)
- Collaborating with local producers and aggregators (e.g. cooperatives, producer organisations) to scale collective supply and logistics infrastructure locally
- Investing in cold storage and transport suited for small-batch or seasonal regenerative produce.

This might require decisions by local government who should take on overall responsibility for driving such changes, and how to incentivise them. Could for example industry associations play a bigger role in promoting local supply chain change and with some government support develop incentives? A form of supply chain audit process should provide a systemic understanding of benefits throughout the whole product cycle when inputs are locally sourced and are of higher sustainability credentials. However, direct price comparison for inputs to manufacturing processes from traditional sources in contrast to sustainably sourced produce will often end in favour of business as usual. Hence, a 'more comprehensive total value' to the manufacturer should be considered for a more relevant comparison. The question remains, how to incentivise achieving such a more comprehensive total value in a low margin industry. While we as summit participants

may take this for granted, communicating proactively what this value is and why it matters is still a necessity that will require continuing efforts for years to come.

Once a food manufacturer has changed to more local and regeneratively produced inputs then further measures need to be taken to support market mechanisms that direct consumers towards their products. The main approaches need to be about increasing visibility and perceptions of the additional value that such products bring to the wider community and the county and need to include the following (*Leicestershire Regenerative Produce Report (2023)*):

- Use of branding and marketing to create consumer pull
 - Highlight the importance of “premium brand” positioning for products that use sustainable regenerative agriculture as their source
 - Highlight regenerative sourcing on product labels and marketing materials.
 - Educate consumers on the environmental and health benefits of regenerative produce
 - Work with public sector and trade bodies (e.g. NFU, LLEP, DEFRA) to amplify regional identity around sustainable agriculture.

Again, these industry actions can only take place when the right policy/regulatory environment and functioning market mechanisms support each other. Hence, we were left with the impression that it might be necessary to:

- *Foster better communication between the food and drinks manufacturing sector in Leicestershire and farming businesses that would be able to supply regeneratively farmed produce. Government information campaigns channelled for example through NFU and the Food and Drinks Federation might enable sharing necessary information between both stakeholder groups to increase awareness of their specific needs to encourage entering business with each other.*

What might be the economic benefits for the food and drinks sector in Leicestershire when using more regenerative and sustainable inputs?

Cost of inputs is what drives buying and sourcing decisions in the food and drinks manufacturing sector. Hence, to consider any additional value that regenerative and sustainable sourcing might deliver, businesses need first to understand what might be in it for them. This is far from obvious in a low margin industry operating in a volatile world. Increasing regenerative land use through increased sourcing of regenerative produce might have multi-dimensional positive impacts on the region and economy once allowing some time to become established. This will also directly relate to success of initiatives mentioned in the previous section, namely the actions businesses can undertake to benefit from regenerative practices (a chicken and egg conundrum to be solved in a pragmatic way). Some of the likely wider benefits for all actors in the food and drinks sector are expected to include (*Leicestershire Regenerative Produce Report (2023)*):

- Stronger local supply chains though increasing local sourcing opportunities leading to higher regional resilience in the face of increasingly volatile food supply chains.
- Increased quality and traceability of inputs for various players in the supply chain
- Creation of economic circularity within the region

There is also a premium dividend to benefit from when it comes to branding and pricing because use of regenerative practices for inputs can be translated into higher prices for manufactured products. In addition, it might facilitate access to large contracts with specific sustainability requirements by establishments such as the NHS, schools, and other public institutions, especially when aligned with county-wide sustainable food procurement strategies.

Another economic benefit may result from increased efficiencies due to more local collaboration and supply chain innovation as businesses might increasingly share the same pool of resources and must cooperate to ensure its sustainability and resilience. For example, a higher demand for sustainable produce may result in increased demand for direct sourcing, co-operative processing hubs, and shared logistics. Furthermore, as more grower networks, box schemes and aggregation platforms may emerge as viable economic actors, wider systemic efficiencies may emerge. Closer collaboration and shared resource management might also facilitate access to subsidies and green investments such as Environmental Land Management schemes, (ELMs), carbon finance, or biodiversity credits (DEFRA (Department for Environment, Food & Rural Affairs), 2025). However, several entrenched challenges remain, as such new ways of working require the right skills and mind set of the people who should drive them. Therefore, it appears necessary to find ways to:

- *Create the right skills base among economic actors in the sector to equip them with a good understanding of how long-term economic benefits can be reaped by working in new ways, based on a shared set of values.*
- *This might require new training and educational programs in the food and drinks manufacturing sector as well as the agriculture sector to drive change based on a shared view of the future of land management and use.*

One example of a collaborative food production environment in the East Midlands is the SmartParc in Derbyshire with a strong focus on sustainability and implementing new ways of working (SmartParc, 2025). SmartParc SEGRO brings together purpose-built food production facilities and support services, all on one site. Developed jointly by SmartParc, who provides in-depth food industry knowledge and manages the park operations, and SEGRO, a European property management firm. This is replacing an old 150-acre brownfield site in Derby. It is expected to add 5000 new jobs to the region and a Gross Value added of £430m. The key contribution is the shared non-competitive services which will reduce operation costs by estimated 20% including energy costs below market rates against a sustainable green roadmap. The park is already in use by international food brands; start-ups; vertical farms and R&D, service and support organisations (Midlands Engine, 2022).

Such test environments for collaborative working with sustainability at the core of all activities in production need to be promoted more widely as they provide valuable lessons in how new ways of working in the food and drinks industry can generate commercial as well as environmental value.

Is the current policy environment sufficiently supportive of regenerative and sustainable agriculture in Leicestershire?

As has been proven historically, fundamental change of industry practices has been driven often by significant regulatory demands and long-term government policy. In many cases, early stages of such industry change were marked by considerable resistance and push-back by industry as well as consumer markets. Promoting regenerative and sustainable land use has been debated for decades in many countries, but only more recently a wider culture of accepting the necessary urgency to achieve it has emerged. This is also reflected in several recent government schemes that aim to promote land use change.

Regenerative and sustainable agriculture in the region is for example promoted through the *Environmental Land Management Schemes* (ELMs), rewarding farmers for providing environmental benefits rather than direct income support. Following Brexit, direct payments to farmers have been phased out in England. Instead, support has shifted more toward delivering public goods, notably environmental improvements. This is part of the wider agricultural transition plan encouraging regenerative approaches. DEFRA's farm business survey data shows that for sectors such as grazing livestock and cereals there are however financial pressures as a high proportion of their profits came from earlier support payments (*Sector profile: Agri-food and Drink in Leicester and Leicestershire*).

The *Sustainable Farming Incentive* (SFI), part of the Environmental Land Management schemes (ELMs) is another policy that should boost support for farmers to transition to sustainable food production. However, despite a revision to the scheme still there are issues with vague assurances and shrinking payments increasing uncertainty across the sector (FarmingUK, 2025). In addition, it was felt by farmers that the involved administrative burden and effort to apply would be often not worth it. More specific to Leicestershire, the *Leicestershire, Leicester and Rutland Local Nature Recovery Strategy* (LNRS), mentioned above, should provide an evidence base to inform local development plans including neighbourhood plans and the proposed new Spatial Development Strategies. It aims to coordinate spatial priorities for nature recovery and land use change. While not a funding programme itself, it creates a framework for future investment through policies such as Biodiversity Net Gain (BNG). It can be used by local authorities and stakeholders to attract new funding and support schemes targeted at ecological restoration and regenerative land management.

Leicester's *Local Plan*, an important planning document that set out the vision and aims for growth of the city until 2036 will be used to allocate sites for development, deliver infrastructure, influence economic investment and make decisions on planning applications. This plan is now submitted to the government for review (Leicester City Council, 2025).

The *Good Food Leicestershire Initiative* is a county level initiative aiming to create market and community incentives for sustainable regenerative farming through pathways such as:

- Encouraging procurement of local produce
- Building networks between farmers and buyers
- Promoting public awareness and education around sustainable food.

Reviewing these more widely known policy efforts, and listening to various stakeholders on the summit, it appears to us that:

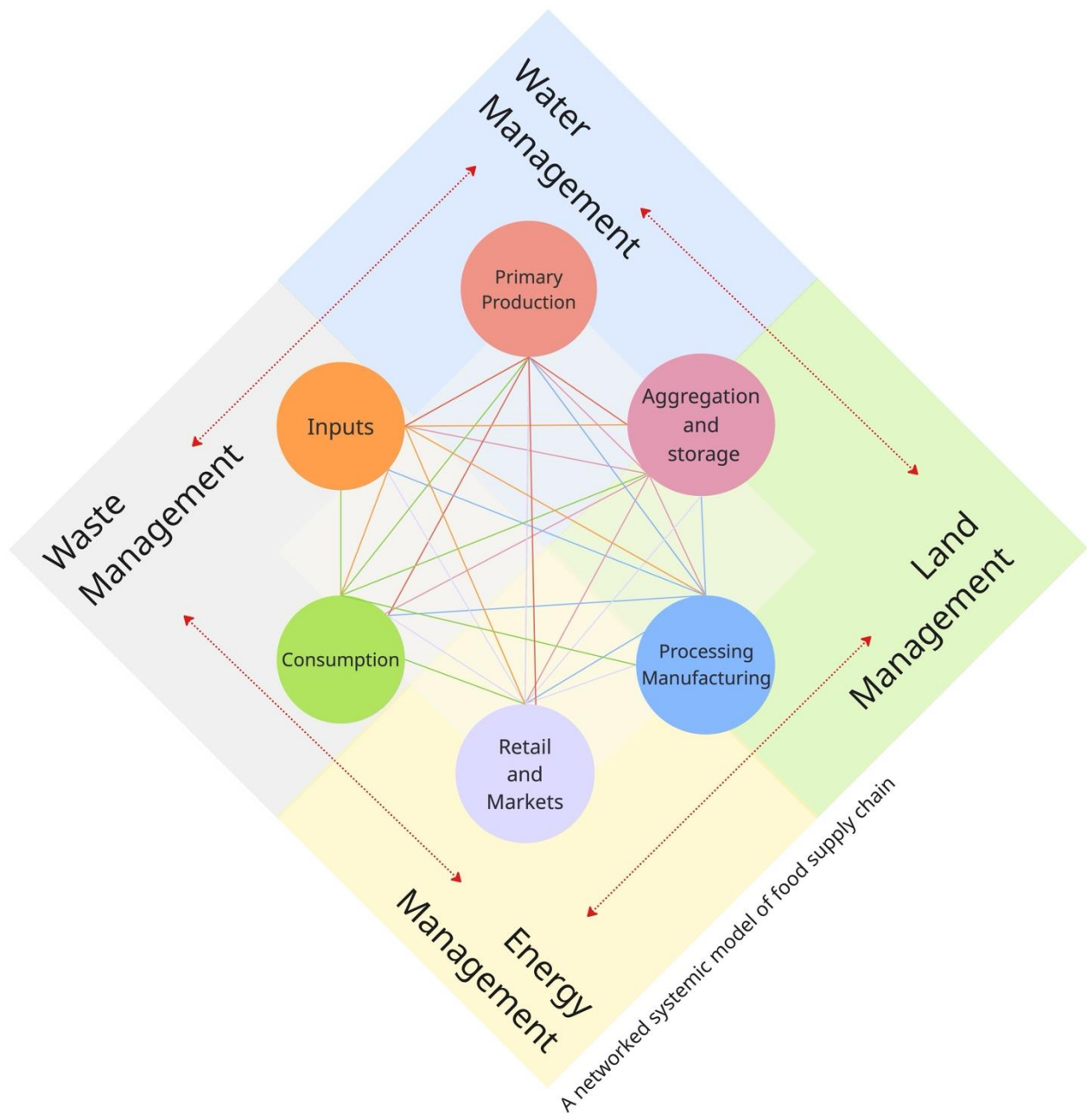
- *Current policy initiatives are often not efficiently utilised due to insufficient information provided to the relevant stakeholders that would be able to benefit.*
- *These benefits need to be presented differently to different stakeholders and the value of collaborating in applications for different support schemes needs to be promoted more clearly as it may lead to more significant outcomes in terms of sustainability gains.*
- *A central entity that would help with developing coordinated utilisation of different support schemes to achieve bigger goals appears to be missing at present. Such an entity that promotes and supports the coordinating of efforts across support schemes in the food and drinks sector community and the agricultural community might help achieving more systemic benefits for both sectors.*

A different view of the agri-food value chain needs to inform decision-making for future land use change

One observation we made during the summit when listening to different stakeholders across the food value chain was that a very traditional understanding of the interactions and impacts of different food supply chain actors prevails. This includes how they view themselves as parts in a linear chain of transactions in which they are mostly concerned with optimising their interactions with upstream suppliers and their downstream customers to optimise profit. However, a serious commitment of all actors within the traditional value chain to more sustainable and regenerative practices and a circular economy requires that the simple, linear models that we all have in our heads when we do business, need to change. This was very apparent in the discussions at the summit, when participants repeatedly urged that a more complex view of how the food system works needs to be embraced by its actors to understand themselves as part of that complexity when wanting to change overall system impacts.

- *Hence, the traditional linear value chain concept needs to be replaced with a food network concept that considers the externalities that in the past were not perceived by its actors as fundamental parts of the system.*

This needs to capture not only how the traditional domains such as inputs, primary production, aggregators, manufacturers/processors, retailers and consumers interact today with each other in a multitude of ways, but also how these domains need to interact continuously with the natural environment and wider ecosystem. Over the past decade, often new technologies have enabled much more informed and data driven interactions among food system stakeholders. This has led to a much more networked, interactive and responsive way of doing business and enabled entirely new business models and ways of working. Given we assume that land use change towards wider environmental and societal benefits is taken seriously, then decision-making in the food value network in each of the fundamental domains needs to consider the impacts that each decision might have on the local priorities in land, water, energy, and waste management. Such an understanding might also lead in time to the insight that every actor in the food value network must pursue multiple opportunities simultaneously to make a positive impact on the environment while still maximising gains as part of the system. To make this possible might require rethinking business models and adopting novel technologies with both aspects in mind when making strategic decisions. Key to success is the understanding that collaboration, flexibility, and cooperation in complex systems increase opportunities and resilience for all parts of the system.



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