

**AUSTRALIAN FOOD SOVEREIGNTY ALLIANCE**

**FAIR FOOD FARMERS UNITED**

**SURVEY REPORT**

**FAIRNESS IN AUSTRALIA'S  
FOOD AND FARMING SYSTEM –  
FARMER PERSPECTIVES AND  
EXPERIENCE**

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## **AUSTRALIAN FOOD SOVEREIGNTY ALLIANCE FAIR FOOD FARMERS UNITED – SURVEY REPORT**

### **Executive Summary**

From June to September 2014 the Fair Food Farmers United (FFFU) branch of the Australian Food Sovereignty Alliance (AFSA) carried out an online survey of farmers' experience and views on fairness and unfairness in the Australian food and farming system. 54 farmers of diverse size, scale, age, production and location, completed the survey.

The survey results clearly point to the need for change at many levels. Unfairness is rife through our food and farming systems, with the power of the supermarket duopoly identified by farmers completing this survey as the number one issue, closely followed by the impacts of cheap imports, free trade, costs of inputs, the cost-price squeeze and power of agri-chemical and seed corporations, and over-burdensome government regulation.

In terms of what 'fairness' in the farming system means, the farmer respondents identified the following key themes:

- Ethical & regenerative food production; including the treatment of farm & supply-chain workers, animals, the environment, and eaters
- Direct access to markets without unfair competition from lesser-regulated imports or non-transparent competitors
- Recognition of the efforts, resources and commitment made by the individual grower/producer in producing food with integrity
- Sovereignty over food production and access to seeds
- Access to land, opportunity and support for the younger generation of farmers
- Fair financial returns to farmers that reflect the true cost of food production
- Increased access to financial and risk management support

As for what needs to be done to achieve these outcomes, the key themes that emerged are the creation of networks, sharing of resources and information, collaboration, and advocacy. There is a clear recognition that farmers who share a vision of a 'fair food future' need to work together to bring it about.

#### **Key findings:**

- 43 percent acknowledged the need for an organised representational group that could lobby on their behalf
- 41 percent cited the need for greater control over the process from production to distribution
- 26 percent advocated for better assistance to access markets
- 17 percent cited greater technical collaboration, knowledge sharing and cooperation on agricultural issues

These are all the reasons why AFSA created the FFFU in March 2014. This survey will be vital in informing our priorities for 2015 and beyond.

***Q: How do you think farmers can work together to create a fair food future?***

***A: By recognising that we are all in this together, collaborating, and that there will be no easy answers. This is hard as we are embedded in a competitive system and paradoxically we need to collaborate for our own and the common good. So creating safe places for idea sharing would be a good place to start...***

***A: Networking to share resources, information and marketing opportunities among all farmers, including farmers from non-English speaking backgrounds. Work towards collective ownership of equipment, training opportunities for young farmers and collaborative research.***

***A: More co-operation in regards to fostering viable (fair) returns for fresh food rather than 'value' being solely price-driven & appealing to low prices. Sharing of information & resources towards production cost & distribution efficiencies. Fighting hard against cheap imports. Educating all consumers (not just the converted minority) about all the aspect of the value of food & its production.***

## **Introduction**

In March 2014, the Australian Food Sovereignty Alliance (AFSA) established a dedicated farmers' chapter, Fair Food Farmers United (FFFU), to 'connect, support and provide a united voice for farmers feeding Australia fairly.' We took this step for two primary reasons:

1. Food sovereignty is a global movement, begun by family farmers, mostly small-scale and bio-diverse, and led by family farmers. It emerged for the first time on the public arena during the 1996 World Food Summit, and it now includes hundreds of millions of people in dozens of countries on every continent. While AFSA has always had farmers as active members, we were conscious that as an organization guided by food sovereignty principles, the voices and perspectives of farmers needed to be prominent, explicit and strong. A dedicated farmers chapter redressed this vital need.
2. Farmers in Australia and in many other countries have long had a tradition of peer-to-peer knowledge sharing and conversation. Of working together to support each other for mutual benefit. We were aware that processes of change in Australian agriculture and rural communities over recent decades, such as the decline of co-operatives and the impacts of globalization, meant that these wonderful traditions were under sustained pressure from many directions. The values and the practices of co-operation and collaboration are both millennia-old; and they are re-emerging currently as best practice to create a fair food future. The FFFU exists to connect farmers across Australia who identify themselves as embracing the values and principles of 'fair food'; to provide opportunities for knowledge-sharing; and to advocate on issues of critical relevance to the viability of these farmers.

Before deciding on an agenda and priorities for the FFFU, we wanted to hear directly from a range of farmers what their experiences and views were on issues of fairness and unfairness in the Australian food system. We wanted to hear their voices so they could set the agenda for the FFFU, and we could frame our plans and actions accordingly.

With the support of the Field Institute and Policy Booth, this survey was developed and piloted during April-May 2014. It was distributed via existing farmer networks and social media during June to July 2014. Since we did not have a defined list of farmers who received it, it is impossible to know how many farmers it actually reached. Our aim, however, was not to achieve a 'statistically significant' number of responses. What we wanted above all was qualitative data from farmers engaged with these issues and who wanted to shape our agenda. And that is what we received, from the 54 farmers who completed the survey.

## **The context – food sovereignty and fair food**

The pace of change in Australian farming has appeared breakneck since the early 1980s. We have seen deregulation across many sectors, the seemingly relentless rise of the supermarket duopoly, the bipartisan embrace of free trade with the consequent loss of local manufacturing capacity and growth in cheap imports, the rising cost of inputs and the squeeze on prices, and an exponential rise in farm debt, not to mention droughts, floods and fires.

The dynamic has been ‘get big or get out’, and, sadly, many have got out – and the exodus continues at the rate of around 7 per day. Only 13% of Australian farmers are under 35, and half of the remaining 130,000 are expected to leave the industry in the next decade.

As a nation, we need to be asking the question: if we don’t start valuing our farmers and looking after them properly, who is going to feed us in 30 or 40 years’ time? Do we really feel happy outsourcing something as fundamental as our food security to the vagaries of the ‘competitive global market’?

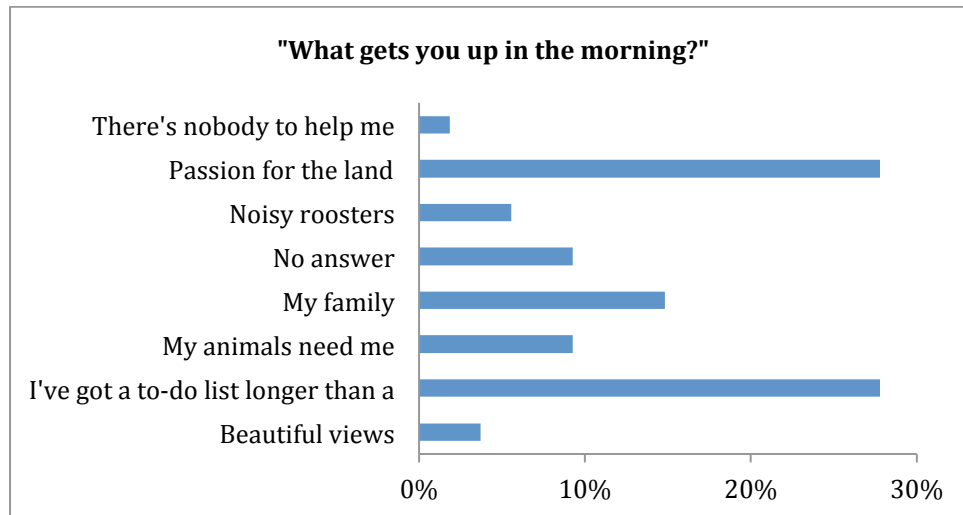
These are the sorts of questions and considerations that inform the development of food sovereignty and ‘fair food’ in Australia, for AFSA / FFFU. Food sovereignty means a democratic food system, which places human health and well-being – and that includes as a fundamentally important matter the well-being of farmers – and ecosystem integrity as its highest priorities. Democratic, because everyone has a stake in our food system, and everyone’s voices should be heard, on equal terms. It’s no longer acceptable that those with the deepest pockets and greatest political influence get to make all the most important decisions. The situation we face is too critical to simply delegate decision-making powers to anonymous markets and boardrooms of the largest multinational corporations.

No. We believe now is the time for as many Australians as possible to get involved in the conversation over the future of our food and farming systems. And given that farmers are – along with soil, seeds, animals and water – the foundation of that food system – their voices need to be heard and valued. This agenda needs to be shaped, as our FFFU member and author Dr Charlie Massy puts it, on the basis of an ‘underground insurgency.’ Farmer by farmer, community by community, change begins and spreads.

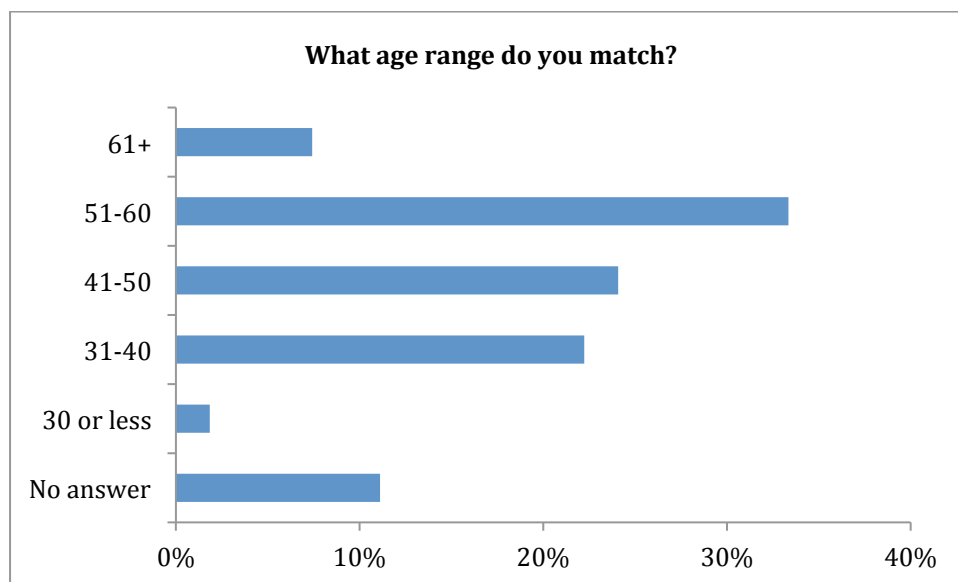
The conversation starts here.

## Profile of the farmers who took part in the survey

So, what do we know of the 54 farmers that completed this survey? First, and most importantly, a passion for the land is what gets them out of bed in the morning! But just as important a motivation is that many of them 'have a to-do list longer than a Leonard Cohen song'.



Secondly, their age profile roughly matches that of other Australian farmers, whose average age is 53, 13 years greater than the average age of the non-farming workforce in Australia.<sup>1</sup>

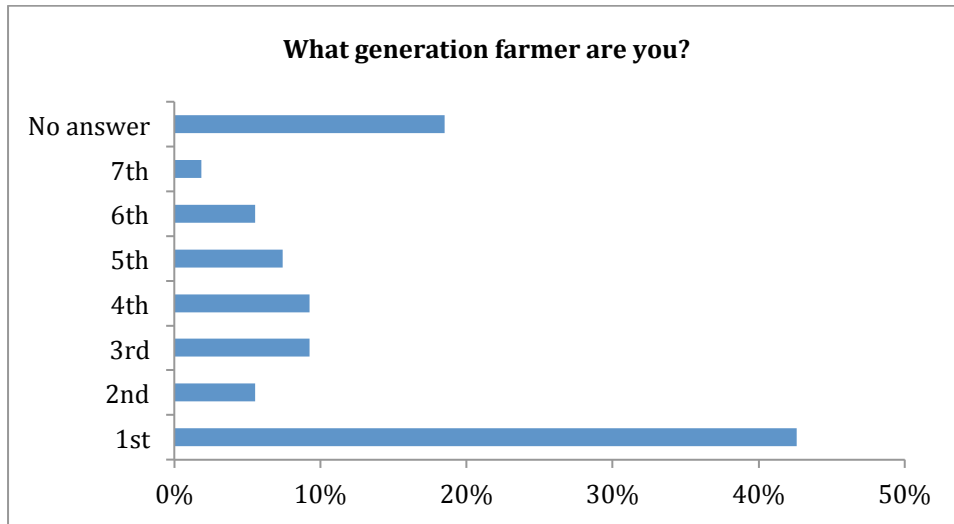


<sup>11</sup> Australian Bureau of Statistics, **Australian Social Trends: Australian Farming and Farmers** <http://www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/4102.0Main+Features10Dec+2012#AN%20AGEING>.

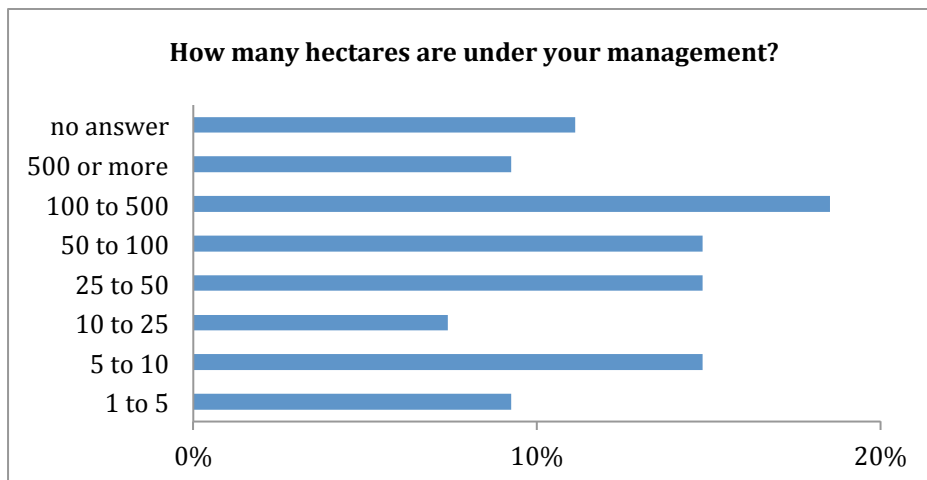
Thirdly, nearly half of those completing the survey are first-generation farmers. While we don't have statistics on whether the 'typical' Australian farmer is 2<sup>nd</sup> or 3<sup>rd</sup> or 4<sup>th</sup> generation, the significant representation of first-generation farmers in this survey would be consistent with a general pattern in which reducing numbers of farms are handed down to children via succession.

As the Australian Bureau of Statistics remarked in its 2012 survey of *Australian Farming and Farmers*:

The number of farmers in Australia has been declining for many decades as small farmers sell up to large-scale farming operations, and fewer young people take over family farms. In fact, there were 19,700 fewer farmers in Australia in 2011 than in 2006, a fall of 11% over five years. Over the 30 years to 2011, the number of farmers declined by 106,200 (40%), equating to an average of 294 fewer farmers every month over that period.<sup>2</sup>



Fourthly, in terms of land size under management, the majority of farms are small – in the Australian context, i.e. less than 500 hectares.

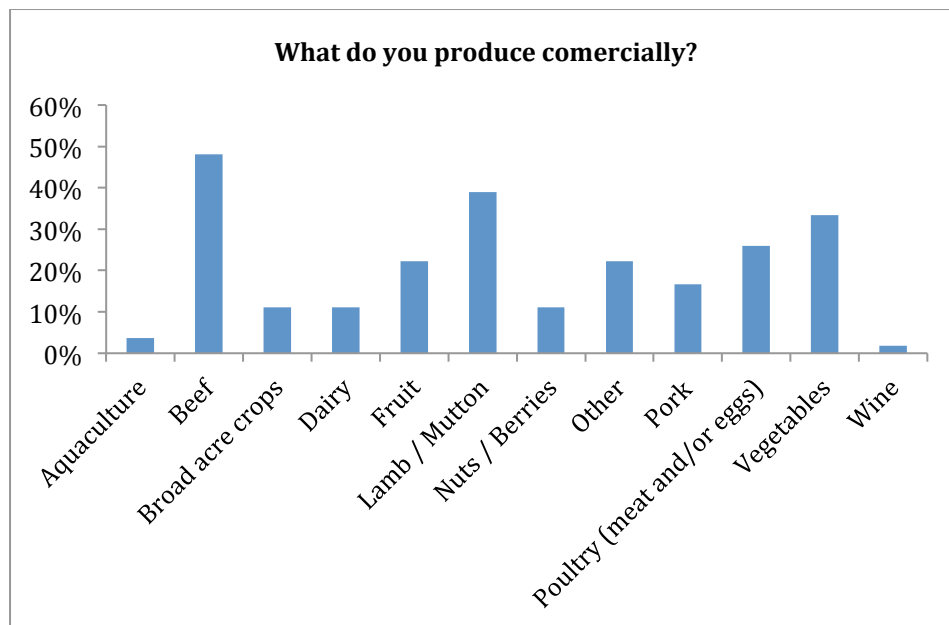


<sup>2</sup> Australian Bureau of Statistics, **Australian Social Trends: Australian Farming and Farmers** <http://www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/4102.0Main+Features10Dec+2012#AN%20AGEING>.

Again, this is consistent with ABS findings profiling Australian farm sizes as a whole:

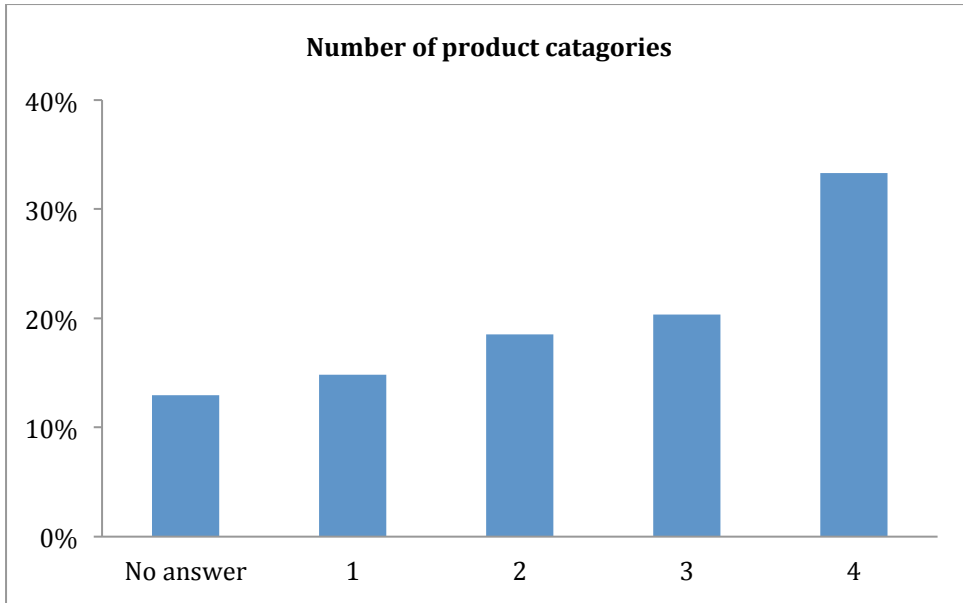
The majority of farms were also small in terms of land area, with around a third covering less than 50 hectares (36%), and a similar proportion (36%) between 50 and 500 hectares. Conversely, there were a small number (100) of massive farms that occupied more than 500,000 hectares, which is more than twice the land area of the Australian Capital Territory. The total area of agricultural land in 2011 amounted to 410 million hectares or just over half (53%) of the nation's landmass.<sup>3</sup>

In terms of commercial production, nearly 50% of farmers surveyed produce beef, close to 40% produce lamb and / or mutton, while 30% produce vegetables. Most of the farmers had a diversity of commercial produce, with 30% producing four or more.

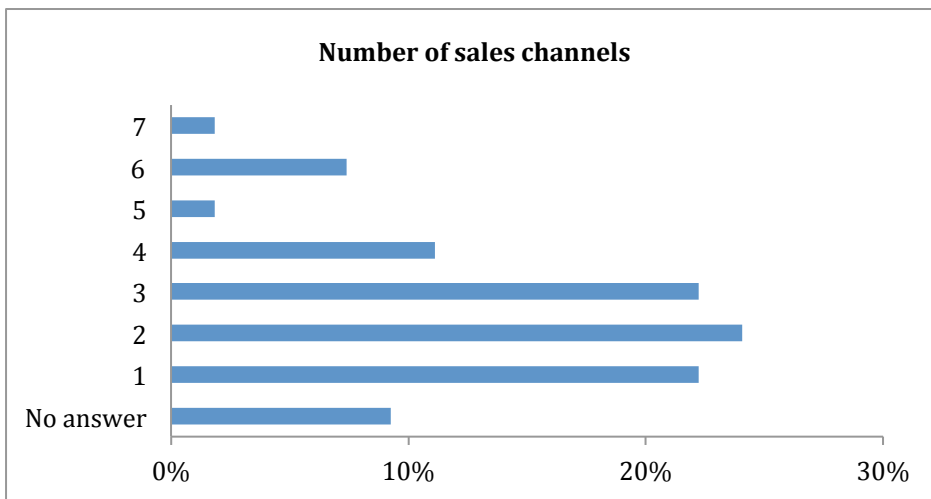


<sup>3</sup> Australian Bureau of Statistics, **Australian Social Trends: Australian Farming and Farmers** <http://www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/4102.0Main+Features10Dec+2012#AN%20AGEING>.

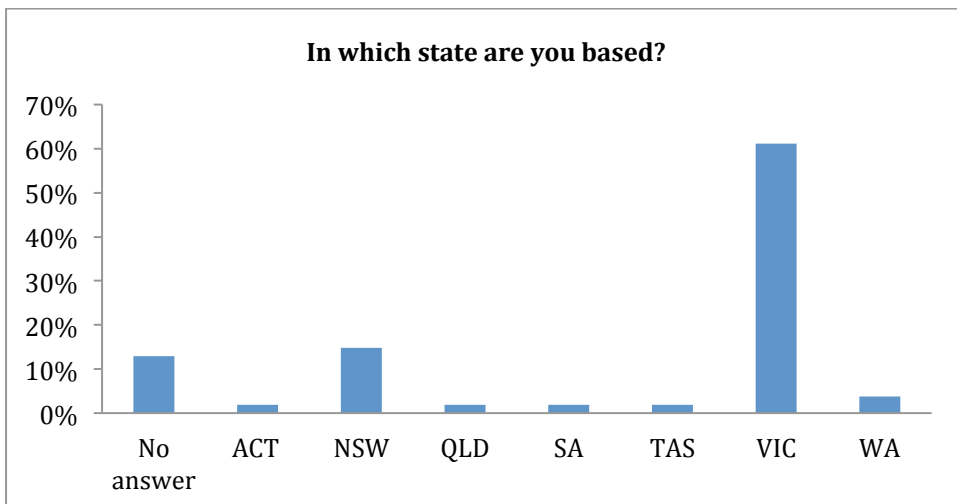




In terms of numbers of sales channels, nearly two-thirds of those responding had between 1-3 means for selling their produce.



And finally, over 60 percent of those completing the survey are based in Victoria.



## **What is 'fair food'?**

*How we feed ourselves and each other is the backbone of how, historically, we have organized our communities and societies. The ways in which we arrange our agriculture systems make evident our larger worldviews. Food literally and figuratively connects us to each other, to our ancestors, to our cultures and to the earth. <sup>4</sup>*

The question of food fairness covers a broad spectrum of issues, including:

- animal welfare ethics, and sustainable and regenerative farm management;
- market power and supply chain control;
- accuracy and transparency in labelling;
- the appropriateness of industrial-model regulatory frameworks for local food production; and
- accessibility of clean, safe, nutritious food for all people, regardless of income or background.

Here in Australia, our food supply is monopolised by two major supermarket chains, creating an unhealthy concentration of power that has major impacts for producers and food manufacturers. Another challenging issue is the prevailing focus on a growth economy that demands ever-greater production volumes in the form of industrialised monocropping and intensive livestock production. The overriding emphasis is on exports and the commoditisation of food within financial markets, underpinned by a growing number of free trade agreements (FTAs), the most recent being the Chinese-Australian FTA, signed in November 2014.

FTAs inevitably produce 'winners and losers'; some producers benefit through greater access to overseas markets, while others suffer through increased volumes of cheap imports flooding into our local markets. How do we measure the true cost to Australia of the hollowing out of rural and regional communities as farm numbers decline and farms get bigger and bigger? How do we stop rising levels of farm suicides and depression? These are questions the Federal government is not answering, let alone asking, in the face of the apparently unassailable wisdom that FTAs are 'good for farmers' and 'good for Australia'.

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<sup>4</sup> Field, T & Bell, B 2013, 'Harvesting justice: transforming food, land and agricultural systems in the Americas,' US Food Sovereignty Alliance, New York.

## 'Fair Food' – the farmers' perspectives

The farmer respondents to our survey had a lot to say in answering the question, 'In the context of Australia's food system, what does 'fair' mean to you?' The responses revealed a rich and diverse perspective on farming, food, justice and fairness.

### WHAT DOES 'FAIR' MEAN TO YOU? KEY THEMES

- Ethical & regenerative food production; including the treatment of farm & supply-chain workers, animals, the environment, and eaters
- Direct access to markets without unfair competition from lesser-regulated imports or non-transparent competitors
- Recognition of the efforts, resources and commitment made by the individual grower/producer in producing food with integrity
- Sovereignty over food production and access to seeds
- Access to land, opportunity and support for the younger generation of farmers
- Fair financial returns to farmers that reflect the true cost of food production
- Increased access to financial and risk management support

The farmers responding to our survey offered several important reflections about the meaning to them of 'fair':

*"Being able to make a decent income while also looking after the environment."*

*"Fair is continued sovereignty over our how our food is grown and how we get access to seed and not endure undue impact from neighbours who are not interested in fair."*

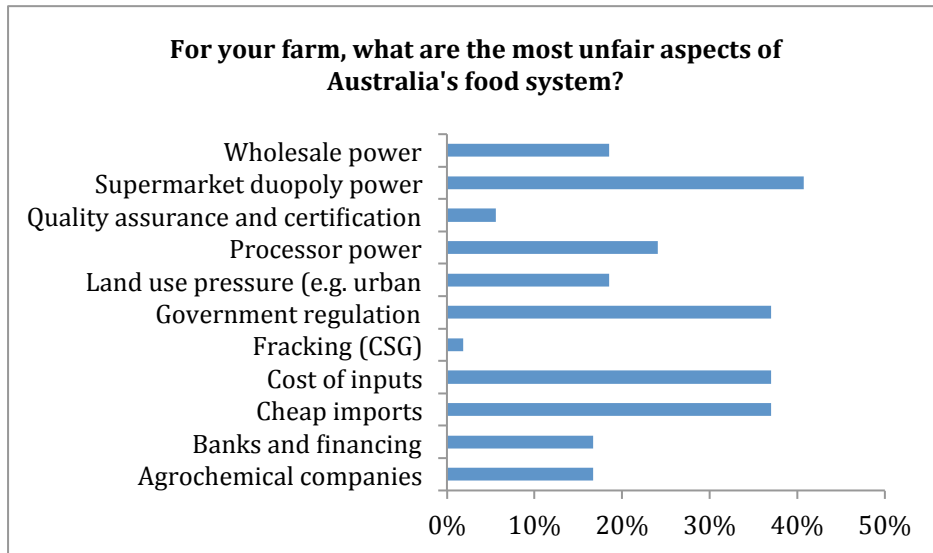
*"Fair price for quality produce. Reward for effort. No tax incentives for corporate investment. Keep out cheap imports for products we are producing here."*

*"Fair price for all parts of the supply system not just the middle-man."*

*"A fair price that reflects the true value of the food we grow and allows us to care for the environment, animals, family and community."*

## **What is unfair about Australia's food system?**

Consistent with the perspective of AFSA/FFFU, as developed in the Peoples' Food Plan and elsewhere, the farmers responding to our survey highlighted concentration of economic power as the major factor contributing to a food system widely and increasingly perceived as unfair.



### **WHAT IS UNFAIR ABOUT AUSTRALIA'S FOOD SYSTEM? KEY FINDINGS:**

- 54 percent of respondents cited the supermarket duopoly as one of the major contributing factors in creating an unfair food system
- 37 percent mentioned cheap imports were an unfair aspect of our food system
- 37 percent said the cost of inputs contributed to an unfair system, and
- 37 percent also said that government regulations made our food system unfair

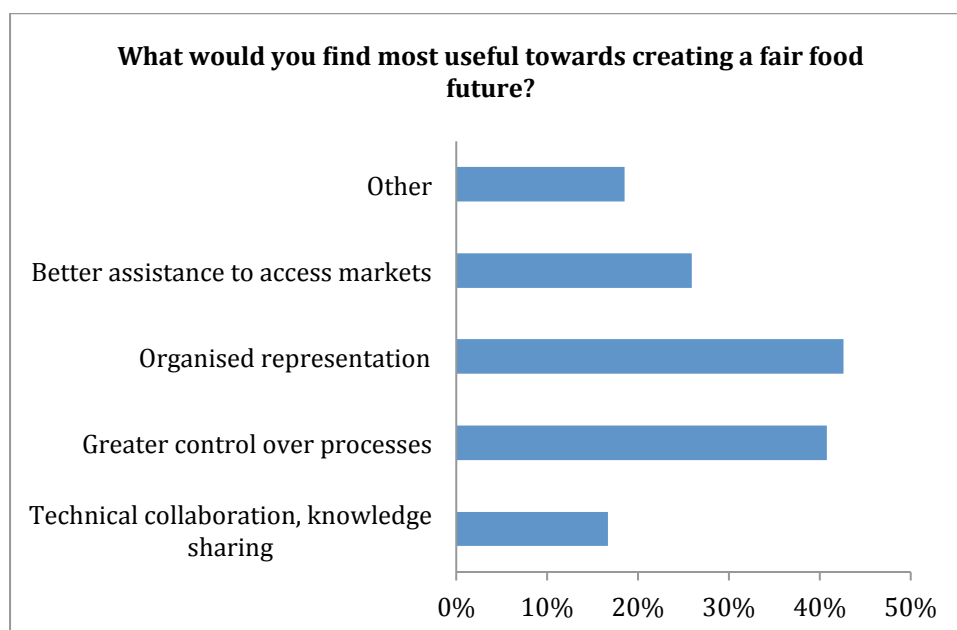
## Creating a fair food future

The farmers who responded to our survey expressed support for an inclusive approach to farming, more cooperation and collaboration among themselves, while advocating for better policies that support small-scale farmers. There is a general sentiment that they lack representation, a cohesive voice that will advocate for their needs and plights.

*“Networking to share resources, information and marketing opportunities among all farmers, including farmers from non-English speaking backgrounds. Work towards collective ownership of equipment, training opportunities for young farmers and collaborative research”*

*“The more farmers unite with a single vision to lobby the government with the stronger and clearer our voice will be heard. Overseas farming industry is one of the most powerful and influential in Australia the disconnect and in fighting within industries and between industries prevents Australian farmers from reaching this same outcome. We are easy to 'divide and conquer'.”*

There is also recognition for the need of farmers to be in greater control of the entire agricultural process, from growing and processing to distribution and sales. This is a key aspect of how food sovereignty looks in practice, both in Australia and elsewhere.



Key findings:

- 43 percent acknowledged the need for an organised representational group that could lobby on their behalf
- 41 percent cited the need for greater control over the process from production to distribution
- 26 percent advocated for better assistance to access markets
- 17 percent cited greater technical collaboration, knowledge sharing and cooperation on agricultural issues

The following quotes from the farmers who responded to the survey show how they express their feelings about the key actions and opportunities needed to bring about positive change. Key themes emerging are networks, sharing of resources and information, collaboration, and advocacy:

*“Networking to share resources, information and marketing opportunities among all farmers, including farmers from non-English speak[ing] background[s]. Work towards collective ownership of equipment, training opportunities for young farmers and collaborative research.”*

*“Acting as a group brings strength to all and the best possible outcomes for farmer(s) and consumer(s).”*

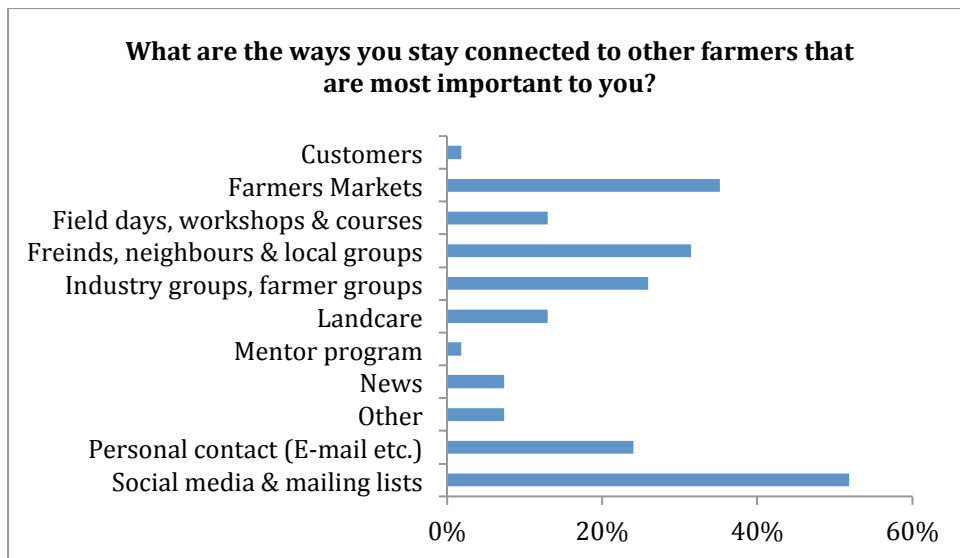
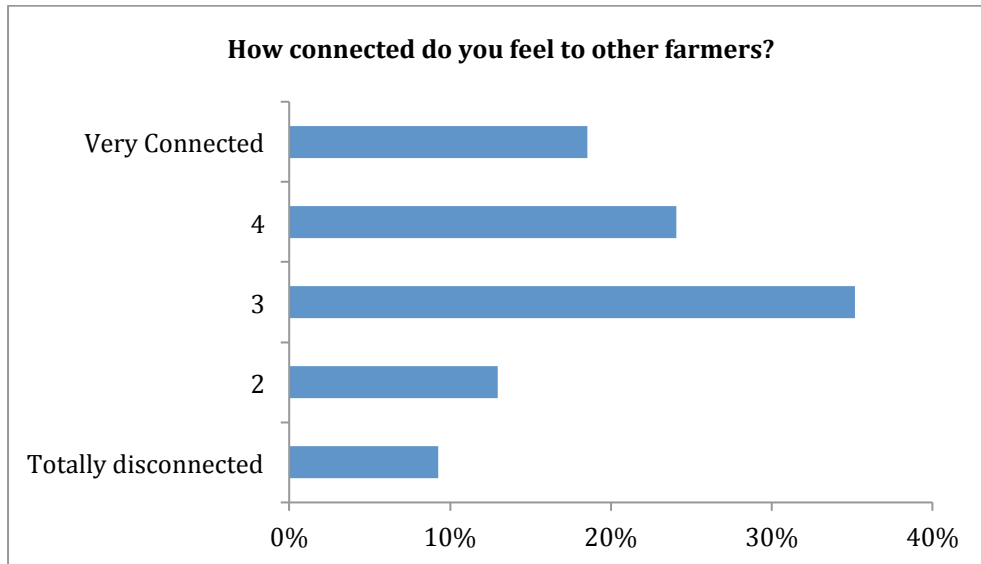
*“Sharing of information and resources towards production cost and distribution efficiencies. Fighting hard against cheap imports.”*

*“Opportunities to collaborate on processing and distribution to allow more control of processing in particular.”*

*“Create a powerful lobby group and form cooperatives.”*

## **Staying connected**

The majority of the respondents believe that they are connected to other farmers, and the main platform cited for staying connected is social media: Twitter, Instagram, Facebook, Skype and online chats/forum.



Farmers' markets and personal network are another significant way of staying connected to their peers in the sector.

## **Discussion**

What do we learn from these survey results? Change needs to happen at many levels. Unfairness is rife through our food and farming systems, with the power of the supermarket duopoly as the number one issue, closely followed by the impacts of cheap imports, free trade, costs of inputs, the cost-price squeeze and power of agri-chemical and seed corporations, and over-burdensome government regulation.

However, all is not warm and cosy in the world of the giants. According to a recent article in The Guardian, supermarket sales are on the decline. This change is attributed to consumer behaviour driven in part by the recession and better awareness of the food system.<sup>5</sup>

Currently, explicit government policy on agriculture supports industrialised, monocropping and export-orientated operations. Banking and financial support in this sector could do with a review to reflect and sympathise with the needs of small-scale farmers, whose issues vary significantly from the large-scale industrialised sector. In the case of the latter, the risks to the business are spread out more equitably between its shareholders, and are protected within its incorporated business status. This situation is vastly different for small family farmers whose livelihood and existence are often solely dependent on the land and climate.

To level the playing field further, small-scale farmers will need access to sympathetic ears within those corridors of power, which under the current system is primarily the privilege of corporate lobbyists. This means small-scale farmers will need to be organised in their action and united in their vision for a just food system through greater cooperation, knowledge sharing and communication.

In July this year, United Nations Special Rapporteur on the Right to Food, Professor Hilal Elver reiterated the need for a shift towards agroecology and the role of [small] family farmers. She called on the world governments to support a transition to “agricultural democracy” which would empower small farmers.

Empirical and scientific evidence shows that small farmers feed the world. According to the UN Food & Agricultural Organisation (FAO), 70% of food we consume globally comes from small farmers.

This is critical for future agricultural policies. Currently, most subsidies go to large agribusiness. This must change. Governments must support small farmers. (Professor Hilal Elver)

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<sup>5</sup> The Guardian October 8<sup>th</sup> 2014, “Why supermarkets are on the way out?” – Felicity Lawrence, <http://www.theguardian.com/commentisfree/2014/oct/07/why-supermarkets-are-on-the-way-out-aldi-lidl>



## **Next steps**

The findings in this survey affirm the need for a strong, united voice for farmers, by farmers, to lobby for the reduction of supermarket power, stopping or reducing the flood of cheap imports competing unfairly with locally grown produce, and raising awareness of the negative impacts of free trade. They also demonstrate the need for FFFU/AFSA to support farmers in their work to shorten the supply chain and take control of their own processing and distribution.

Towards those ends, FFFU/AFSA have a number of plans in track. First, we will be hosting a forum on 24<sup>th</sup> February at Monash Law School entitled 'Is everything I want to do really illegal? Australian regulators enabling fair food'. We have invited a range of food regulators to sit on panels with small producers and have an open and productive discussion about the barriers farmers are facing in meeting regulatory requirements better suited to industrial food supply chains and possible solutions.

In advance of the forum, we would like to collect farmers' stories about issues you've had with regulations, which will help inform the discussions on the day. Please [click on this link](#) to share your story. You may opt to keep your response anonymous.

We intend to use these stories and outcomes from the forum to lobby seriously for fairer regulation for local food production.

[Join us](#) in the shift to 'agricultural democracy' and help us realise our mission to connect, empower, support and advocate for Australian fair food farmers.