



# HEALTHY FOOD, HEALTHY PLANET

Survey of Civil Society work

Released April 2022



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# 1. Introduction

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- a) Healthy Food Healthy Planet
- b) Our research in support of the movements



# We are the Healthy Food, Healthy Planet Movement, and we are working to radically transform Europe's role in animal-source foods.

## Who are we?

Our movement is a group of organisations and funders coming together around a shared vision to align food with the SDGs. Our core goal is the transformation of food environments that shape the production and consumption of animal-source foods.

We are cultivating trust, collaboration, shared narratives, and shared infrastructure. These elements will enable us to fund and launch our own campaigns and to support the activities of others.

## What are our values?

We believe systemic change starts with changing values. Our movement is

- Collaborating across interest groups
- Empowering for grassroots leadership
- Promoting social justice
- Learning from successes and failures

We take inspiration from the seven principles of the Global Alliance for the Future of Food.

## What is our movement?

The HFHP movement connects civil society organisations and interest groups for growing collaboration and ambition. We include animal advocates, defenders of the environment and planet earth, and health advocates, among others.

We include those most impacted by food's shortcomings, including farmers, animal agriculture and processing laborers, low-income communities, and others.

## What do we plan to accomplish?

HFHP will find common ground, grow the movement, and challenge the status quo.





# Healthy Food Healthy Planet

Healthy Food, Healthy Planet (HFHP) is a collaboration between civil society organisations (CSOs) and funders united by a shared vision. The coordination team is focussed on.

## Coordination and leadership

- Exploring together how radical we want to be, and what that radicalism will look like in terms of messaging, governance, and ways of working.
- Getting the basics right for communications and information sharing
- Ensuring that alliances and networks within the movement are engaged and supported by the coordination team.

## Collaboration and co-creation

- Continue with the co-creation approach because it helps address the unequal power dynamics between funders and civil society organisations. Our focus will be strategic litigation and strategic communications
- Create spaces for honest, values-based conversations and stronger solutions that take into account privilege and power. Our focus will be driven by the movement,

## Campaign support

- Supporting members to access money through the first Request for Proposals from the pooled fund set up to support the initiative.
- Identifying future research needs
- Setting out a process for sharing learnings across the movement and evaluating the impact of HFHP

## 2. About the CSO survey

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- a) Methodology
- b) Classification
- c) Who responded





# Methodology

*Not a full portrait of the movement, more a snapshot of some parts of that movement*

## Design & distribution

Sent to 228 CSOs in France, Germany, Spain, Netherlands & UK, plus pan-European networks and the EU policy offices of international NGOs

Framed around respondents work on 'sustainable diets' with a particular (but not exclusive) focus on 'less and/or better meat'

Questions designed with input from HFHP team and food system campaigners, survey opened in waves between July & September 2021

## Response & results

- 104 part or complete responses received = **45% response rate overall**
- *The small sample size requires **CAUTION** in interpreting these results – the insights presented here need to be further ground-truthed and tested*

# Classification

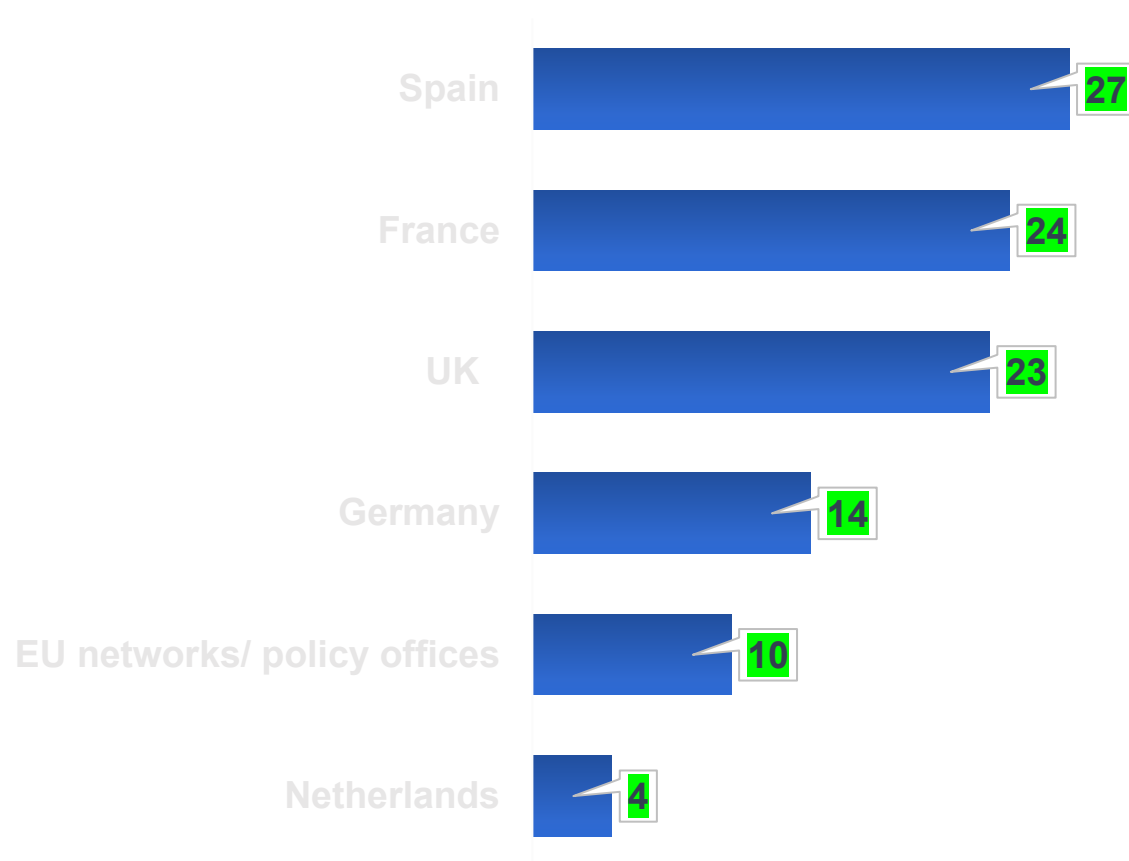
Organisation category and number of respondents		Description/ focus
Food action	21	Practical measures to take back food system from industrial agriculture <u>e.g.</u> food networks, education, procurement
Farm better	19	Promote alternative farm systems <u>e.g.</u> agroecology, organic, often liaise with farmers including on 'better' meat through extensive livestock
Animal welfare	18	Challenge industrial animal agriculture <u>e.g.</u> via policy work, engaging actors along food supply chain, <u>public mobilisation</u>
Environmental policy & campaigns ('Env P&C')	17	Work on meat & diets among a range of environmental themes, often through a lens of climate and/or ecological emergency
Food policy & campaigns ('Food P&C')	9	Agriculture, food & land use including aspects of food security and justice, this category includes several networks & alliances
Vegan/ vegetarian	9	Meat-free diets, with emphasis on transition plant-based and alternative proteins
Conservation	7	Impact of food systems on species, habitats & ecosystems
Health	3	Human health, interplay of diets with nutritional outcomes and chronic/acute disease
Consumer rights	1	Adoption, protection and enforcement of core consumer rights in relation to food industry

Respondents were given anonymity  
They were categorised by organisation type



## The survey heard from CSOs in five countries plus EU-focused networks

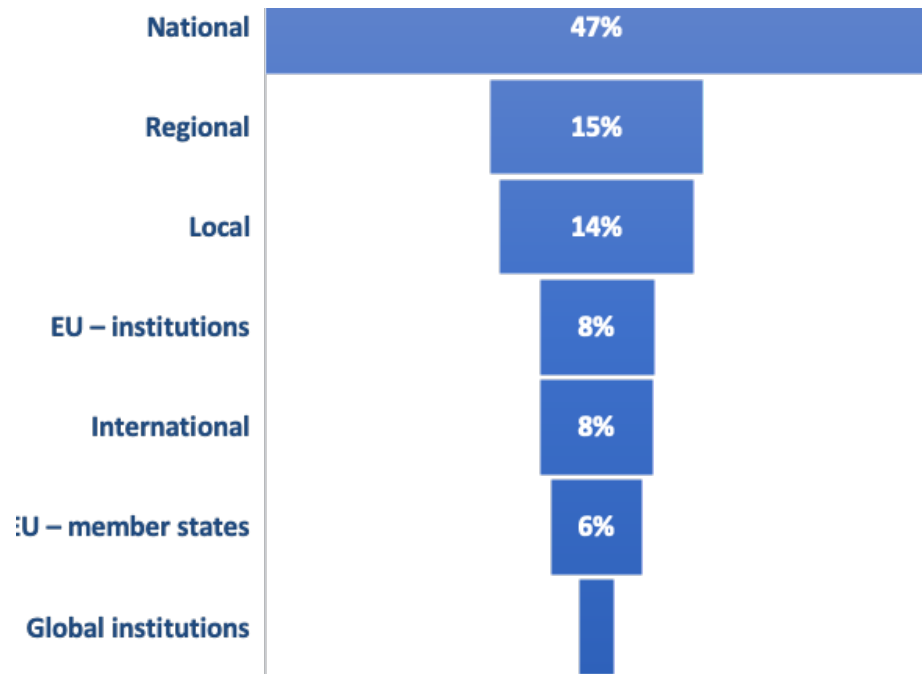
Respondents, by country



- Respondents range from local food networks to international NGOs, from climate campaigners to faith groups
- These organisations are diverse in what they set out to achieve. *What they have in common is a belief that more sustainable diets can help them achieve their end goals*
- Altogether respondents invest an estimated €59 million on sustainable diets work per year, *less than 15% of their total organisational income*



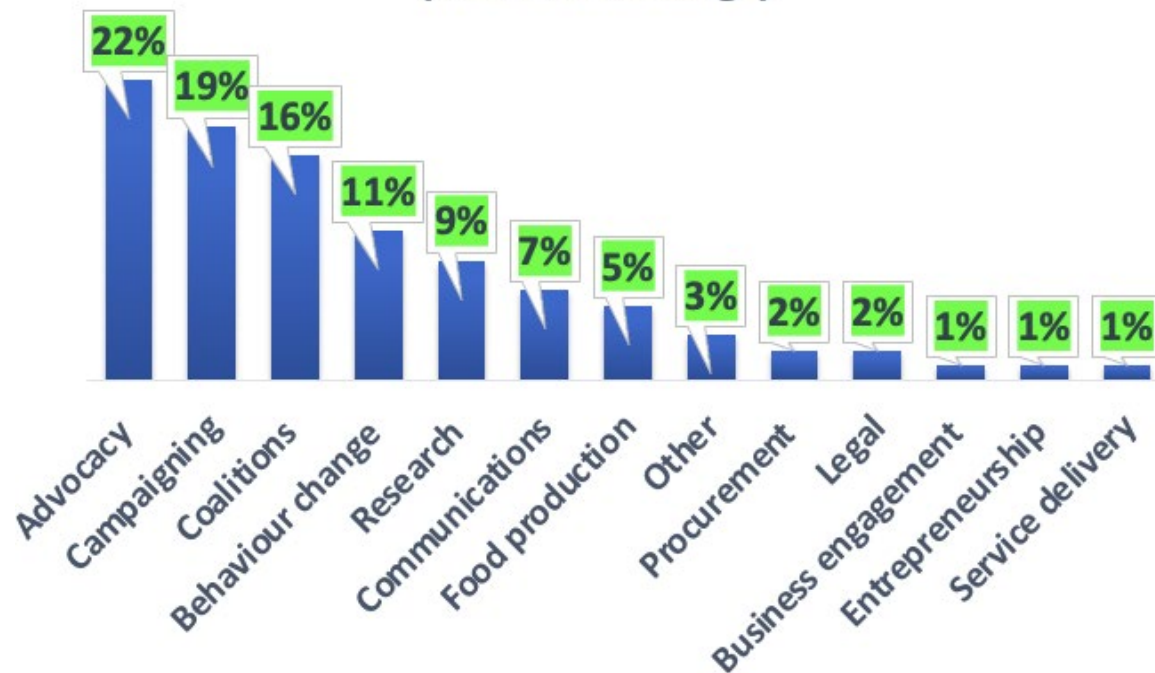
## Most respondents do most of their sustainable diets work within their home nation



- 75% of combined work effort is directed to national, regional or local level work, *which accounts for 60% of total expenditure on diets work*
- Relatively little effort is directed to EU-level work *despite the EU's prominent role in food, agriculture and land use policy*
- International work takes in an array of countries from China to Cuba, Australia to South Africa *and is associated with 20% of diets work expenditure though only 8% of work effort*

## Respondents prioritise advocacy, campaigns & coalitions as strategies to increase sector impact

Which strategies are most in need of extra capacity, to accelerate the impact of the sector's collective meat & diets work?  
(% of #1 rankings)



- Respondents point out that capacity in several areas is needed to underpin campaigning and advocacy success
- Spanish CSOs include food production networks in their top three, for instance to promote organic and agroecological methods
- CSOs working at EU level rate strategic communications and coalition-building equal first followed by campaigning and advocacy
- Combined work effort is spread wide and thin, the average respondent works across six strategies at once
- One third (34 CSOs) devote at least half their work effort to a single strategy *public campaigning is the most popular speciality,*

# 3. Survey findings

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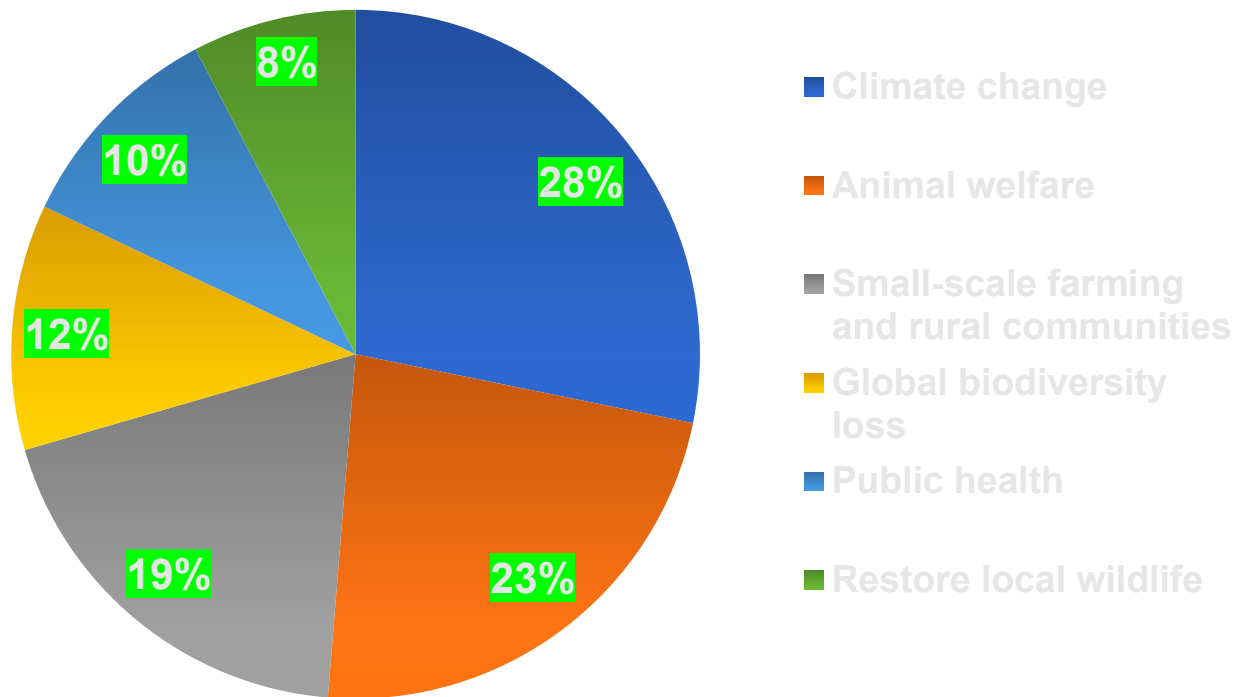
- a) *Motivations for working on sustainable diets?*
- b) *What you think are our successes & failures?*
- c) *Whose work is admired and people want to learn from*
- d) *Strategies the sector needs to use more?*
- e) *What policy changes do these CSOs see has having most potential?*
- f) *How does Covid-19 change the outlook for sustainable diets work?*
- g) *What networks and coalitions are these CSOs part of?*
- h) *To what extent is sustainable diets framed through a 'less & better' lens?*



# Motivation

## Climate, animal welfare and thriving food & farm communities are top motivations overall

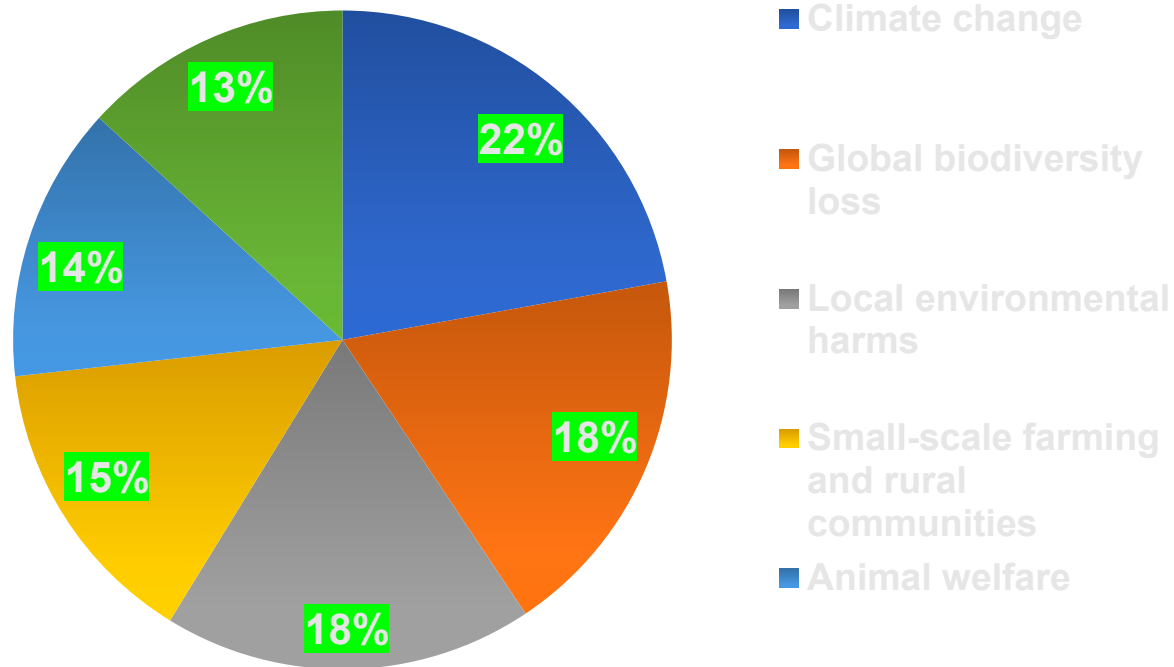
% of #1 rankings, reasons for working on sustainable diets



- Nearly one in three name climate as their top motivation, *including several vegan/vegetarian groups, as well as food policy specialists and general environmental campaigning NGOs*
- Nearly a fifth of participants put the needs of rural communities/small-scale farming as their main motivation
- Public health is named as a top motivation by groups *including those who focus on food policy and practical supply chain reform, as well as CSOs from the health sector*

## ..biodiversity and local harms rise up the list if we count additional motivations

% of #1-#5 rankings, reasons for working on sustainable diets



- Counting all #1 to #5 rankings, climate stays top, followed by biodiversity loss and local harms to air, water and soils
- Justice and rights-oriented motivations – e.g. food security & welfare of meat industry workers score too lowly to feature in this chart *although addressing power dynamics in the food system is a recurrent theme in comments left through the survey*

### Different countries report different motivation mixes

- A desire to *support small-scale farming and rural communities* is the top motivation for Spanish CSOs, ahead of climate change
- *Animal welfare* is relatively more important to French and German CSOs
- British CSOs are the only ones to rank *public health* in their top three motivations overall
- French CSOs are the only ones to rank *rebalancing power in the food system* among their top three motivations

# Success and Failures

The mainstreaming of certain diets & food preferences is the most widely noted success..with this catalysed by the vegan and animal welfare movements, and now adopted by mainstream businesses as their own

*Env P&C [EU]:* “Animal welfare organisations have been very successful with their arguments, moving more people to vegetarian or vegan diets”

*Food action [ES]:* “The vegan movement has transmitted to young people through social networks and influencers, including athletes and celebrities”

*Health [DE]:* “Initiatives like Veganuary are a successful low-threshold offer to try out a sustainable diet”

*Farm better [UK]:* “Uptake of organic has increased. Success was about partnering mainstream businesses and taking a commercial approach – the focus is on selling organic food, regardless of the ethics of the companies involved”

## However, 'meat-free' initiatives stir mixed feelings (1)

*...where some see the benefit of simple messages/asks, others see a risk of oversimplification*

*Food P&C [UK]: "[We cannot] oversimplify this to 'meat bad, vegan good'"*

*Animal welfare [ES]: "So far the most successful campaigns have linked the problem to animal welfare. It remains to integrate this link with wider environmental and social factors"*

*...backlash against messengers and campaigns sets off alarm bells and limits the space for policy change*

*Env P&C [FR]: "The [campaign] attacking butcheries was a failure. It has harmed all of our campaigns on the "less and better" of meat"*

*Food action [ES]: "In Spain the consumer minister said you have to eat less meat and the president came out saying that there is nothing like a good steak. Painful. "*



*...if meat and diets are dragged into a culture war, respondents worry we cannot win it - at least not with the movement as it is now*

*Food P&C [DE]:* “Several campaigns to change political guidelines (e.g. ban junk food from advertising to children etc) unfortunately remained unsuccessful despite media attention. Here the actual pressure on politics is missing, which could be generated (with the appropriate resources) from collaboration from health and other sectors”

*Food P&C [DE]:* “Campaigns which are not co-carried with agricultural actors are very badly experienced by the latter and are counterproductive. Ultimately farmers need to make changes so we need to bring them on board”

*...national action on sugar & salt and the EU veggie burger battle are seen as campaigns that overcome backlash, with learnings for ‘less and better’ meat*

*Food P&C [DE]:* “The European Parliament rejected a proposal to ban terms like ‘veggie burger’ or ‘plant-based steak’ in October 2021. A key success factor was assembling a broad coalition of NGOs and businesses that coordinated lobbying and communications around one single-minded goal and ask”

*Animal welfare [EU]:* “The sugar tax and salt reduction was successful because industry was forced to change by government, after united campaigns that included concerns about health. This could provide a model for action on meat reduction”

## **Local food networks and procurement partnerships are seen to be changing menus for the good...with multi-stakeholder collaboration the key to success**

*Env P&C [UK]:* “The Sustainable Food Places network works from a grassroots to a national level and facilitates collaboration between local authorities, NHS, education sector and business”

*Env P&C [FR]:* “Our campaign on vegetarian menus in canteens worked very well. Success factors: solid vegetarian coalitions, diversity of tactics and their complementarity - a lot of national but also local advocacy work”

## **Animal welfare organisations are credited for winning the most tangible policy successes...though blocks remain to more systemic progress**

*Conservation [EU]:* “Animal welfare groups have had a massive impact, notably in France. Often small outfits have exposed abuse and skillfully used social media to shame politicians into action. They have achieved tangible results like new legislation (on slaughterhouses, cages etc) and general societal backlash against the livestock industry”

*Animal welfare [EU]:* “Despite some small advances, campaigns for CAP reform [have failed] due to the conflicting interests of conventional agriculture”

# Strategies with most potential for impact

## 1) Public sector standards and public spending are seen as key targets for action

- Driving up food procurement standards in public sector catering is the most popular policy wish (41 mentions)
- Next up is redirecting subsidies away from industrial farming towards sustainable food production (29 mentions)
- Allied to subsidy reform, some respondents desire more regulatory support and investment in local and small-scale food production (15 mentions)

## 2) Education can influence dietary choices, as can product labelling and advertising bans

- Some respondents see training and education policy as a means of driving more sustainable food choices (20 mentions)
- A number want mandatory food labelling to be expanded and improved (16 mentions)
- A few include restrictions on the advertising of harmful food (however defined) on their policy wish list (7 mentions)

## 3) The use of fiscal measures draws moderate interest as do regulations around corporate disclosure

- Respondents see a role for fiscal penalties and incentives (13 mentions) *including tax relief on 'sustainable' food (however defined) though very few suggest an outright tax (or ban) on meat*
- A similar number (12 mentions) want to pursue policies that require food businesses to report on social and environmental parameters *including food waste, climate and health impacts, and land use change including deforestation*

#### 4) Some emphasise the importance of high level and coherent policy frameworks

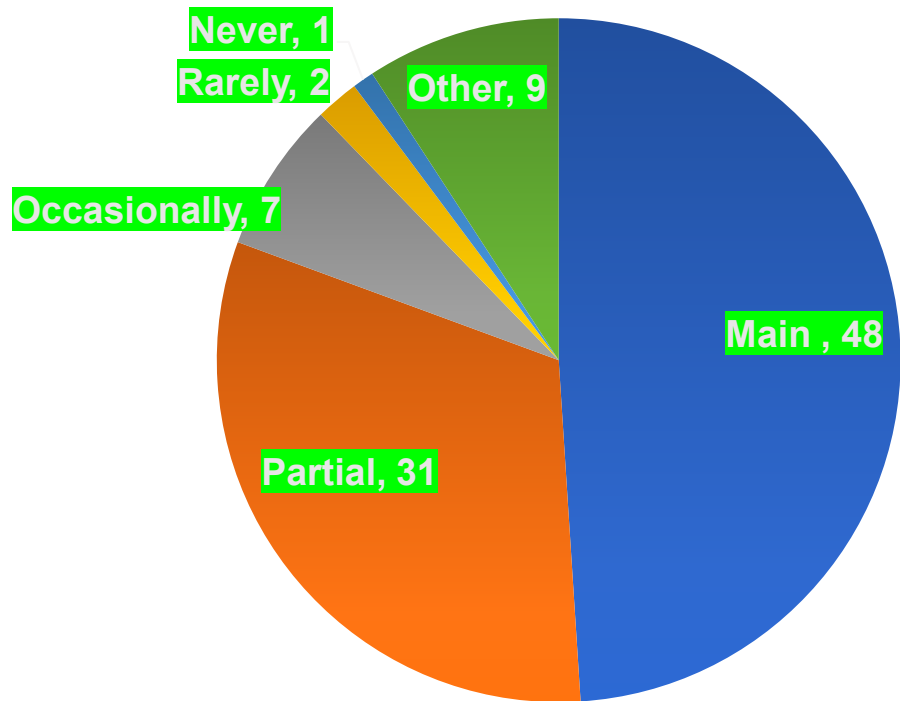
- The creation of national/regional food and protein strategies is seen as a good thing (8 mentions) *not least for helping close the disconnect between food, health and environmental policy-making*
- Reforming the Common Agriculture Policy remains a priority for some (10 mentions)
- Trade policy receives a few mentions *especially from UK*

#### 5) There are additional policy asks that reflect the diversity of respondents

- Just transition is a front-of-mind consideration for some groups - households on low income - *farming communities*
- Two organisations mention fish consumption and production [*note: survey sample has very low representation for CSOs working on fish issues*]
- Other policy ideas floated include the creation of pesticide-free regions, and the use of medical prescriptions for fruit & veg

# Framing work through a 'less & better' lens

To what extent do you use 'less and/or better meat' as a frame or focus for 'sustainable diets' work? (CSO numbers)



- Respondents think deeply about meat and diets, but do not necessarily major on 'less & better'
- 'Less and/or better' is a main focus for half of respondents, and a partial or weaker focus for the rest. *These figures are broadly the same across the different countries*
- Some groups in the 'occasional', 'rare' and 'other' categories are actively looking to increase their meat focus in future

- **Some speak ‘less & better’ messages loud and clear...**
- **...others prioritise ‘less’, especially those promoting vegan/vegetarian diets & animal welfare**
- **...while some emphasise ‘better’, because they believe in a high-quality livestock sector**
- **...or because they see risks attached to the framing of ‘less’ in public debate**
- **A few see artificial meat as a solution in itself *and* a way to side-step negative reaction to ‘less’**

*‘Main’ env P&C [EU]:* “It combines well the work we do on the production and consumption of animal products. It also allows explaining the issue in a more complex way and it does not simplify the problem to a need to reduce meat consumption”

*‘Main’ vegan/vegetarian [UK]:* “Less meat only, encouraging more flexitarians as a step on the path to veganism”

*‘Main’ farm better [ES]:* “Sustainable diet for us is an issue inferred from the main one, which is the support for pastoral systems. This meat has very little to do with that of industrial production”

*‘Occasional’ env P&C [DE]:* “[We need to] avoid a culture war over meat eating”

*‘Main’ animal welfare [UK]:* “Technological advances have [more] chance if the full costs of animal agriculture are captured in their price. Removing subsidies would create the environment for the technological options to compete & succeed”

# Collaboration and networks

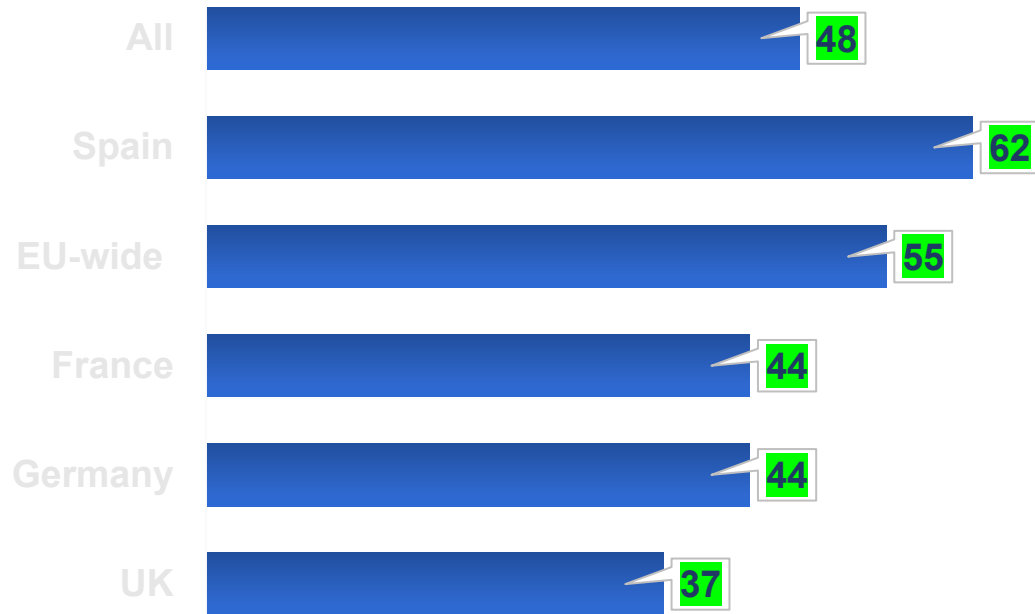
Networks named by more than 3 respondents	Country
Red de <u>Ciudades Agroecologicas</u>	Spain
50by40.org	EU/global
Sustainable Food Places	UK
Plataforma por la <u>Ganaderia Extensiva</u>	Spain
Food Policy Coalition	EU (informal)
Eating Better	UK
Sustain	UK
<u>Coalición Por Otra PAC</u>	Spain
<u>Plateforme pour une autre PAC</u>	France
<u>Réseau Action Climat</u>	France
Friends of the Earth	EU

- In total, respondents participate in 94 different networks for their sustainable diets work of which only 20 are named by more than one respondent (mostly in Spain, France and UK where most survey responses were received)
- This apparent fragmentation may reflect the many CSOs who work at sub-national level, *more convergence may have appeared with a large survey sample size*
- Respondents are part of many networks with little crossover between them



# Respondents see room for improvement in civil society networking and coordination

Strength of current networking on sustainable diets (rating: 0=weak, 100=strong)



- On average, respondents score the current state of network strength as 48 out of 100 *with substantial variance between highs and lows*
- 8 out of 10 respondents do at least some work in coalitions
- *Many see stronger coalitions as a key strategy for the sector's success*
- *Others see gaps in the geographic or sector coverage of existing networks*
- Some urge a selective strengthening of the networks we already have

## Who do respondents want to collaborate with more?

Sector	Examples
Other CSOs	Health, development, climate, consumer associations
Universities/ expert bodies	Nutrition societies, sustainable development panels
Farming <u>organisations</u>	Extensive producers, farm unions, agricultural colleges, vets
Government	Local, national, parliamentary groups and policy forums/ think tanks
Food industry	Retailers, restaurants, caterers, butchers
Media	Film producers, investigations

- Asked to name desirable partners, respondents listed over 150 organisations across several sectors *as shown here, in descending order of popularity*
- ‘Other CSOs’ are the most desired category of partner groups – names given include Extinction Rebellion as well as some of the conservation, animal welfare and food policy groups who took this survey
- Desired health sector partners include those focused on specific diseases (e.g. cancer, obesity) as well as general nutrition
- Organisations named in the government category vary from local authorities in charge of food procurement through to the UN

# COVID – the potential impact on our work

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## Opportunity

- the pandemic has raised awareness and changed consumer habits
- ...and served to highlight the cracks in current food and land-use systems

*Env P&C [ES]:* “It highlights the close link between the health of people, animals and the planet. Makes visible the role of diets, the impact of industrial livestock and the benefits of extensive farming.”

## Risk

- However, some see a *RISK* that newly popular frames will be captured by vested interests
- ...or that ‘better’ meat (and the price tag attached) will be a push too far
- There are also concerns about the general political context (strength of vested interests)...
- ...and about how long the new level of scrutiny around food and health will last

# 5. Funders – what you wanted to tell them

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**Stop project churn:** be patient, think big and invest long-term

**Show courage:** aim for systems change and speak to power

**Invest in movement skills:** boost capacity for advocacy and legal interventions

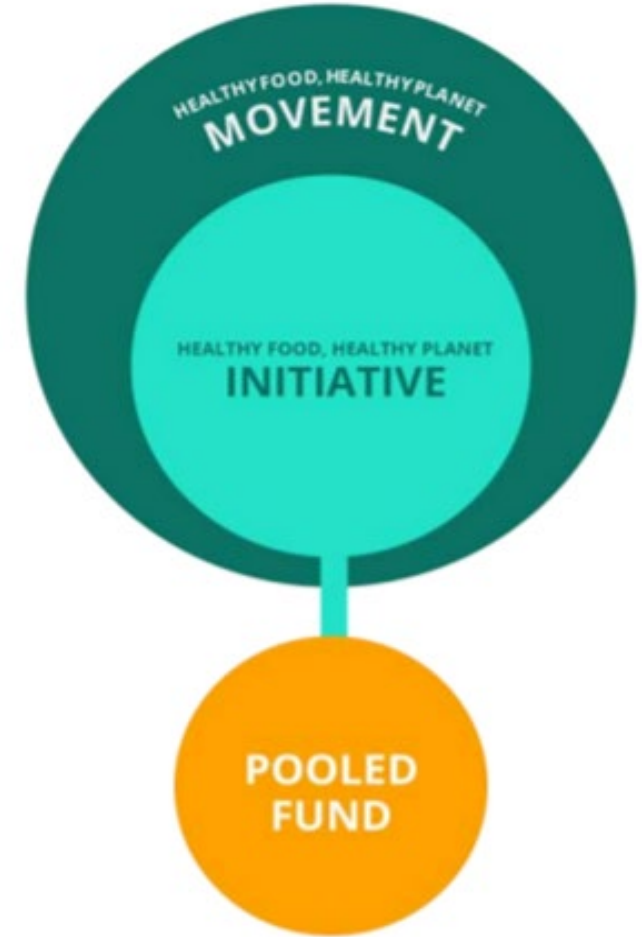
**Invest in movement skills:** tell better stories via more strategic communications

**Reimagine food supply:** innovate, but beware trade offs and miracle solutions

**Avoid tunnel vision:** do not make climate the sole focus of food system funding

**Strengthen coordination:** within the funder community as well as among NGOs

**Put social justice and equality** front of mind in selecting projects for funding



4000 words of feedback we will pass on



# 6. Discussion points

With special thanks to all the groups who contributed their time and insights to this survey

# Is there a strength in diversity or is it a recipe for fragmentation?

Can we draw the following interim conclusions

- Sustainable diets work attracts a range of organisations *who differ in what they set out to achieve, but share the belief that less and/or better meat will help deliver their end goals*
- We are *motivated by a range of drivers including climate change, animal welfare, nature protection, food as a community & cultural good, and the propagation of sustainable (non-industrial) farm practice*
- To an extent, we agree on where meaningful change is likely to come from and what levers should be pulled - *more capacity for advocacy, public campaigns and coalition-building are seen as keys to success*
- Education, awareness-raising and individual behaviour change remain well-used strategies, but we *need to more directly engage corporate, political and financial*
- The alignment among CSOs is tested by the topic of less and/or better meat, with *some of our tribes emphasising the less, some the better and others no meat at all*
- For some, these positions are non-negotiable, *but many are willing to work with less AND better, albeit with some hesitancy about backlash to 'less'*

# How can the many coalitions & networks collaborate to achieve critical mass?

Can we draw the following interim conclusions

- We see that broad & strong coalitions are ***key pieces of movement infrastructure - platforms that underpin successful campaigns and neutralise backlash***
- The current network landscape is fragmented, with:
  - ***Gaps between networks that operate at different geographic levels*** (which may mean grass roots energy is not being channelled as effectively as it could be into 'bigger picture' policy or corporate campaigns)
  - ***Gaps between networks for different stakeholders*** (for instance environmental and animal welfare groups may network in different places to agricultural or public health organisations)
  - ***Gaps in network membership/ representation*** (respondents want to see more consumer, health, development and climate CSOs involved and more link-ups with progressive parts of the food and farm industry too)
- We value the recruitment of diverse stakeholders into coalitions
- We need ***greater investment in deepening and linking existing networks rather than creating new ones***

# Thank you

With special thanks to all the groups who contributed their time and insights to this survey