

Local and sustainable (for those who can afford it)

Few challenges to voluntary measures, significant challenges to mandatory measures

With an ever-increasing share of society valuing locally sourced, high quality produce, the trend towards more sustainably produced food continues. This leads to a large share of the European food being produced sustainably to cater for healthy eating habits of those willing and able to pay for it. This sees a large part of the agricultural sector transform into a more boutique style of farming with a regional focus, and a reduction in food imports from across the world. However, not everyone is able to afford the premium prices of high-quality food, nor interested in changing their lifestyle. Mainstream farmers using conventional practices therefore continue to make up a significant part of the sector.

Production for processed exports remains important and the market also expands for imports from outside Europe, including those with lower standards for those unwilling or unable to purchase healthy and sustainable alternatives. Technological developments make agricultural production more traceable across the entire food chain, and this enhanced transparency means buyers increasingly trust what they are paying for. Direct interaction between farmers and individual consumers is facilitated through improved (e-)communication channels. Farm cooperatives are key in supporting social innovation and enhanced communication, including direct marketing and sharing knowledge about sustainable farming practices.

With groups in society preferring a more locally embedded lifestyle and a large part of the farming community and society placing a high value on wellbeing, heritage and local production, grassroot movements appear across Europe resulting in community members taking responsibility and action for their community by developing food systems that are focused on provenance and quality. This leads to pockets of increased self-sufficiency in food, wood and other rural products across Europe, and significant progress towards a circular economy.

Growing public appreciation for the role of farming and the rural environment triggers a move to the countryside, reinvigorating local communities and motivating good stewardship of the land. But these developments also come with more sprawled residential developments, fragmenting the countryside. Similarly, the desire to become more self-sufficient drives an increase in urban farming.

Local initiatives thrive, partly due to a lack of trust in public institutions to take action. Europe's ambitions for sustainability are rather inward-focused with Member States and regions having a lot of flexibility on the implementation of European policies, empowering land managers to innovate and find their own, locally relevant ways of meeting sustainability targets.

Differences in ability to buy healthy food amplify inequalities in society. Society increasingly values individual freedom, and as a result, there are more choices for consumers from a growing range of production systems that prioritise different preferences, ranging from the preference for cheap food with lower environmental and welfare standards, to organic alternatives and a range of niche markets for local and specialist products that meet health and sustainability preferences.

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