TRUST IN FOOD™

Sustainability Research Report 2019

FARM JOURNAL

Mitch Rouda, President
Trust In Food™

Executive Summary

One year ago, Farm Journal publicly launched the Trust In Food™ platform. This effort represented a watershed moment in the history of our 142-year-old organization. We stepped forward to dedicate a significant portion of our business resources to work with leaders such as you to bolster consumer trust in food. We recognize that an essential way to build that trust is to help scale voluntary adoption of conservation agriculture practices that benefit farmers' bottom lines, improve water quality and restore soil health.

The insights you see on these pages—Trust In Food's second annual Sustainability Research Report, modeled after the inaugural 2018 report we conducted in partnership with Field to Market—is intended to serve as a baseline. It measures the perceptions and behaviors of farmers, ranchers and growers about conservation agriculture practices, sustainable food systems and the tools and resources that will allow agricultural producers to measure today's successes and tomorrow's progress.

Data points from this research suggest five important takeaways for all stakeholders along the value chain to bear in mind as they take their work into the field this year and beyond:

- The majority of farmers are unfamiliar with supply chain sustainability metrics.
- Farmers recognize consumer trends create pressure but remain autonomous.
- Financial benefits are the most important factor for farmers making on-farm sustainability decisions.
- Few farmers know their carbon footprint, though they are farther ahead on other sustainability practices.
- Farmers say their definition of sustainability varies from consumers' definition.

Some of these findings come as no surprise. Others present challenges for us to consider with fresh eyes. Whatever perspective you bring to these data points, it is our hope that you use them as a foundation for collaboration with the spirit of partnership, understanding that we can learn from diverse points of view.

Think broadly and deeply about these subjects and about ways we can all help each other build trust for our food system—through the valuable and unique roles we each play.

Mitch Rouda

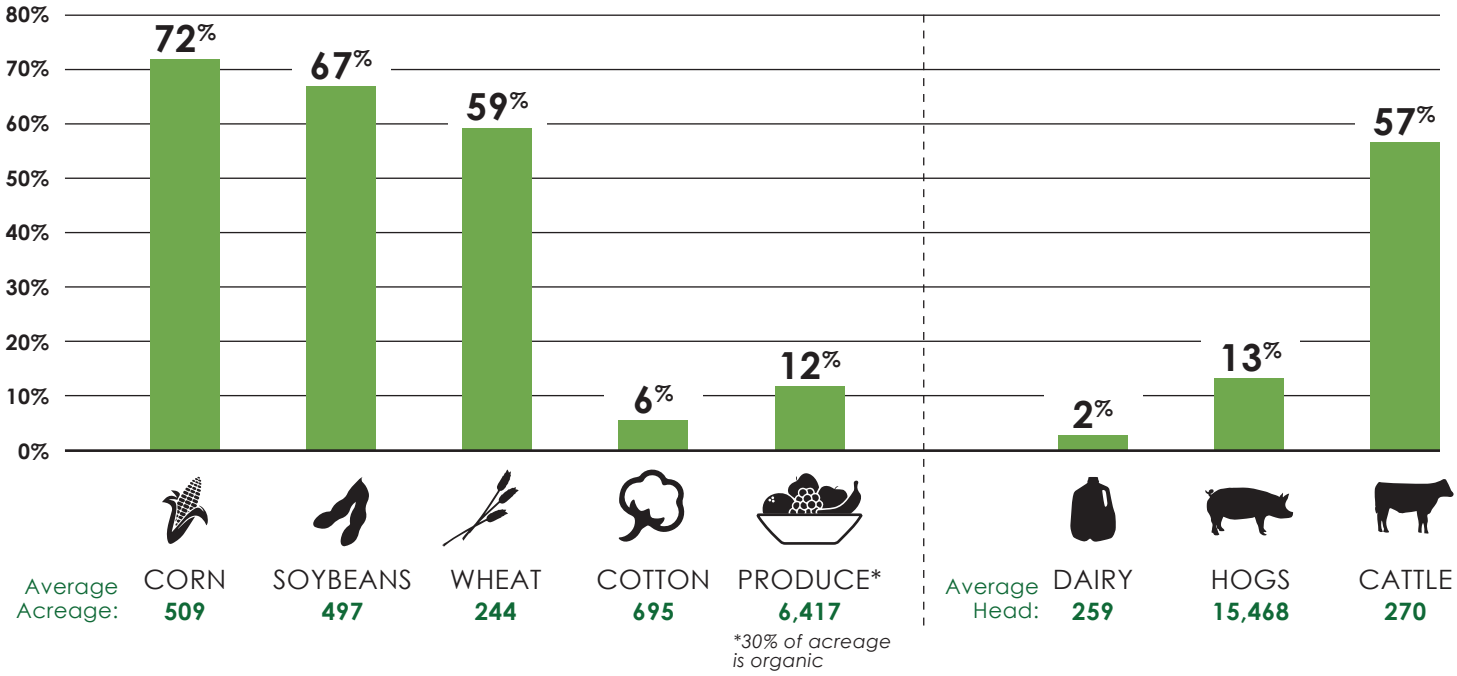
MITCH ROUDA

Executive Summary

Each year, Farm Journal surveys a broad range of farmers growing or raising row crops, specialty crops, cattle, dairy and hogs to provide key insights into sustainability and conservation agriculture trends across America's farmland. This year, the survey included 950 respondents (almost double last year's) with a margin of error of +/- 3.2%.
The purpose of this research is to better understand:

- **How farmers, ranchers, growers and other food producers define sustainability.**
- **The degree to which farmers have adapted on-farm sustainability practices.**
- **Farmers' expectations of food companies and food retailers related to sustainability.**
- **Needs and interests surrounding sustainability practices, information and education.**

Survey Snapshot: Farmers, Growers and Ranchers Speak Out



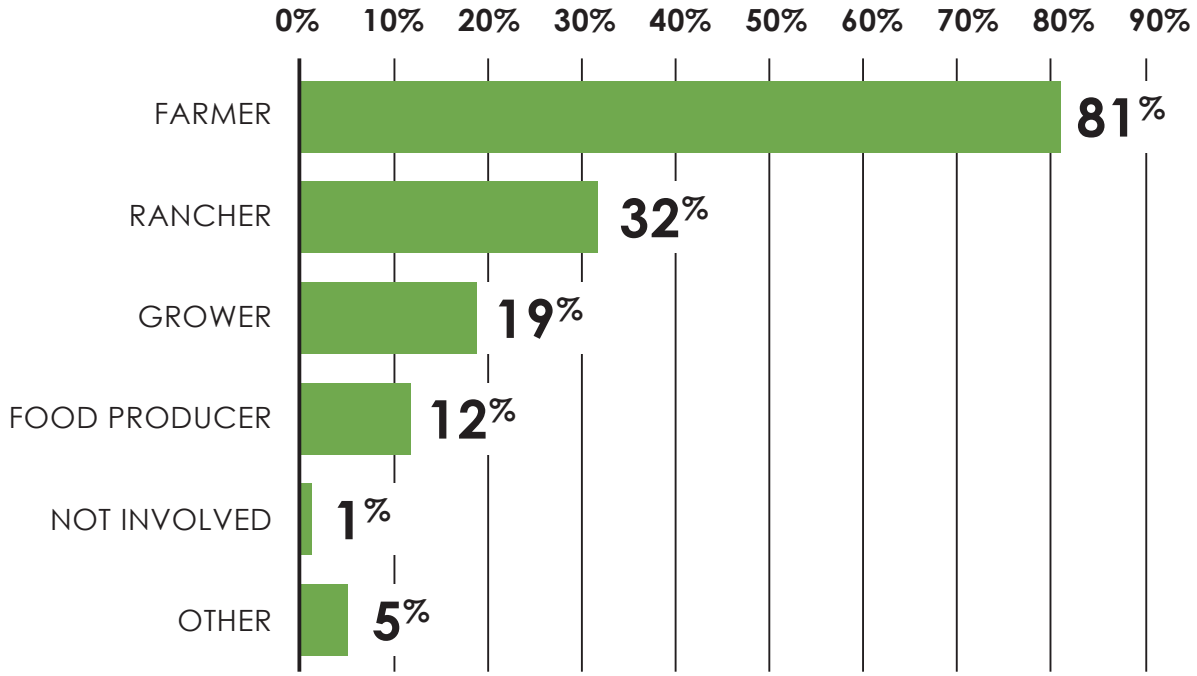
Understanding farmer's perceptions of conservation and sustainability, as well as their on-farm practices, plays a critical role in informing efforts to scale conservation-minded behaviors. Likewise, this insight is critically important for forecasting agricultural and agri-economic trends, which will shape our food system in the years to come. What follows are the results of our survey along with five key takeaway macro-level trends.

Trust In Food™ will build on this baseline each year, tracking behavioral and perception shifts over time to inform the industry.

What Food Producers Think About Sustainability

Nearly 81% of respondents consider themselves farmers, 32% ranchers, 19% growers and 12% food producers. Respondents could select more than one option.

What is your role on your farm or ranch?



Takeaway No. 1:

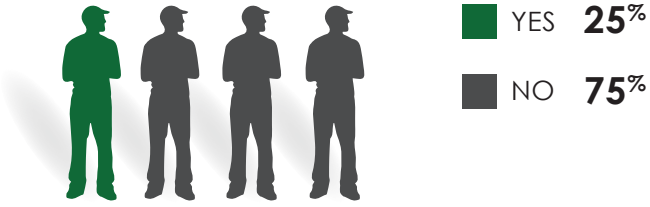
The Majority Of Farmers Are Unfamiliar With Supply Chain Sustainability Metrics

Farmers clearly believe consumers want sustainable food, but they're divided on how swiftly those beliefs will require them to make changes in their on-farm sustainability practices. Almost half (44%) of farmers don't know when consumer pressure for sustainable food will affect their operation, yet an increasing number (22%, up from 17% in last year's survey) believe this will happen in the next five years.

How soon will your operation be affected by consumer pressure for sustainable food?

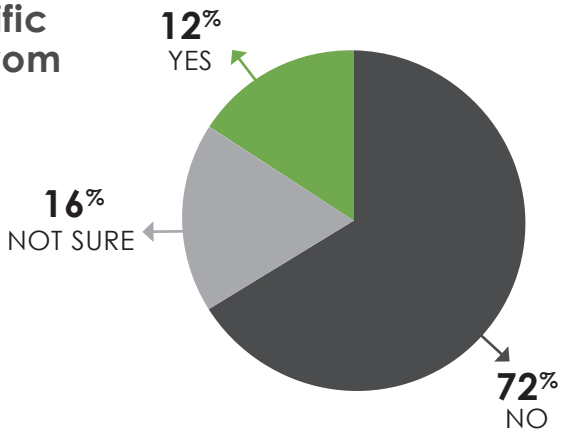
Three fourths of farmers (75%) are not using any tools to measure their sustainability performance.

Are you currently using any tools to measure sustainability performance or recommend best practices?



Close to three quarters (72%) of farmers have not seen specific sustainability goals from a food or beverage company. Nor have they been asked to respond to supply chain surveys or questionnaires about sustainability from the stakeholders in their supply chain.

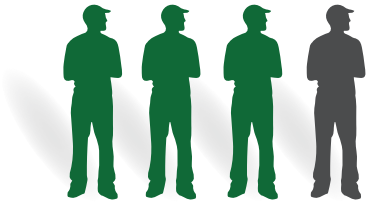
Have you seen specific sustainability goals from a food company?



Takeaway No. 2:

Farmers Recognize Consumer Trends Create Pressure But Remain Autonomous

Do consumer sentiments or demands influence farming practices?

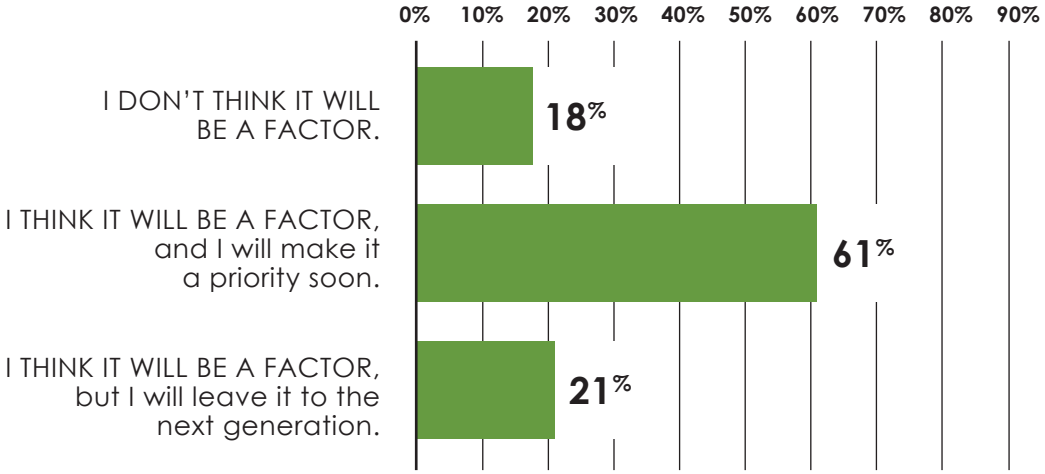


YES **67%**

NO **33%**

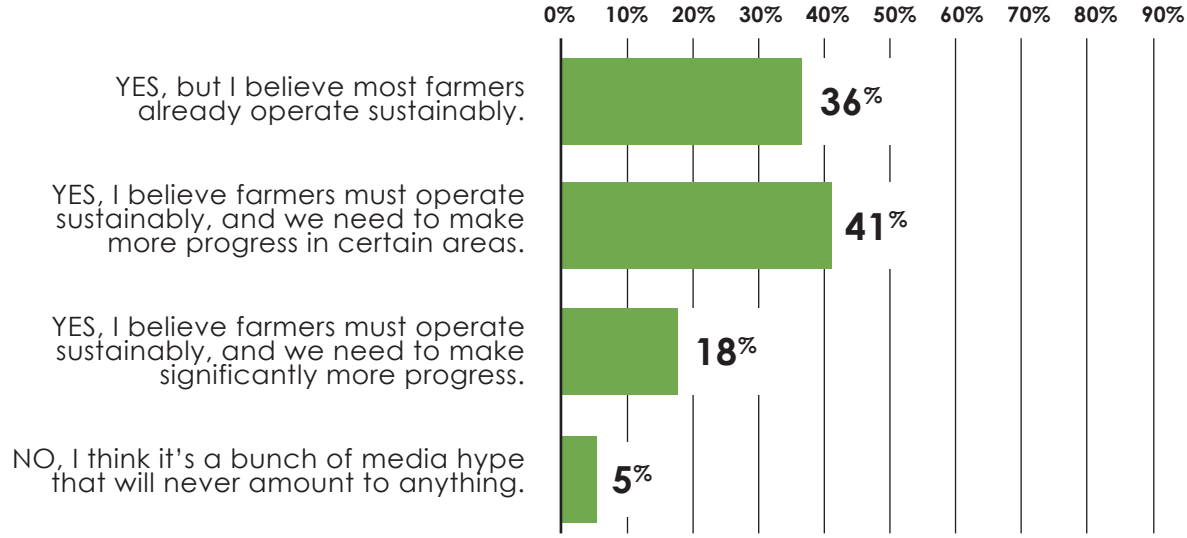
More than half (61%, up from 55% in last year's survey) say they think consumer interest in sustainable food "will be a factor in the near future, and I will make it a priority soon." Meanwhile, 21% (down from 23% in last year's survey) say they think it will be a factor but will leave it to the next generation while only 18% (down from 22% in last year's survey) say it won't be a factor.

Which of the following statements best describes your feelings about consumer interest in sustainable food?



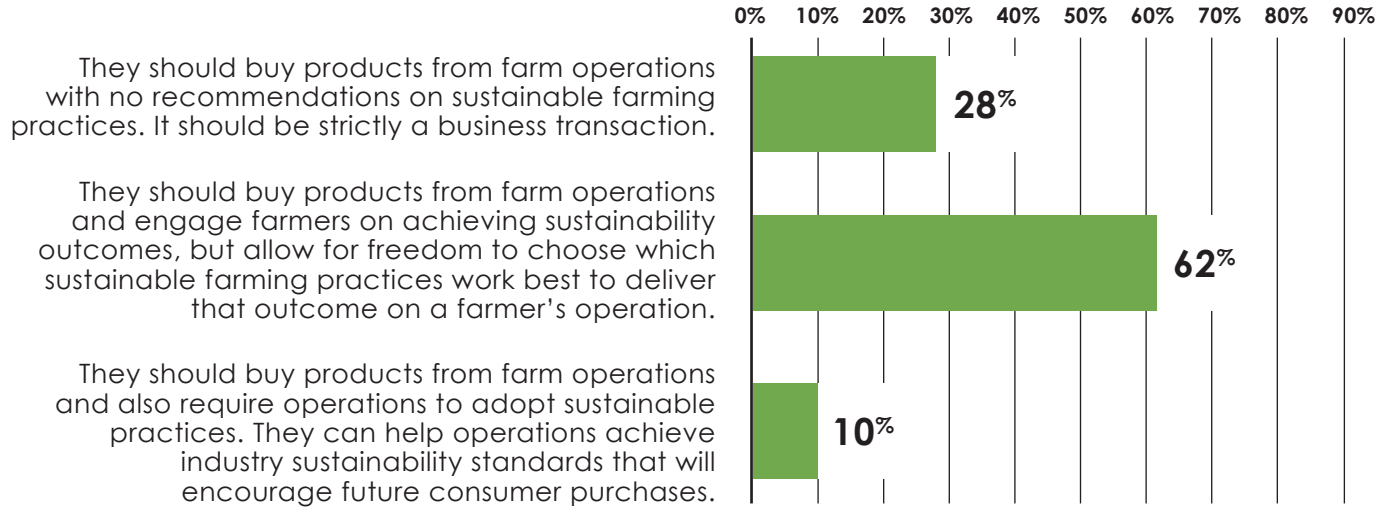
A decreasing number (36% this year, down from 41% last year) of farmers think most farmers already are operating sustainability, while an increasing number (41%, up from 38% last year) say farmers must operate sustainably and need to make progress in certain areas.

Do you believe sustainable farming practices are essential to the future of agriculture?



The majority (62%) of farmers think food manufacturers and retailers should engage farmers on achieving sustainability outcomes if farmers can choose which practices work best to deliver a particular outcome on-farm. Just over one in four farmers (28%) said it should be a strictly business transaction, pointing to the importance of farm autonomy and economic viability in sustainability decisions.

Which of the following statements best describes the relationship food manufacturers and retailers should have with farm operations?

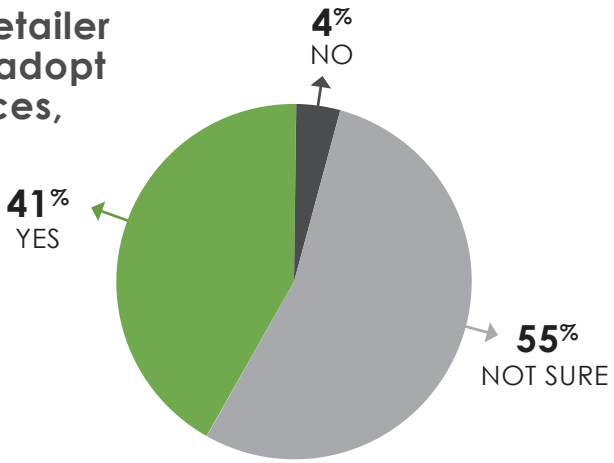


Takeaway No. 3:

Financial Benefits Are The Most Important Factor For Farmers Making On-Farm Sustainability Decisions

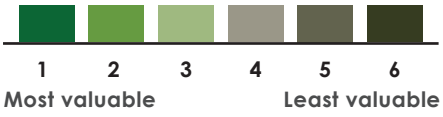
More than half of farmers say they're not sure if they would use tools to adopt sustainable farming practices presented by food manufacturer or retailers.

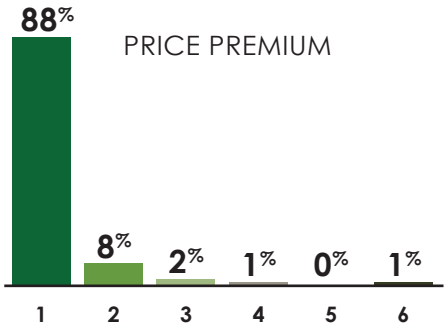
If a food manufacturer or retailer provided you with tools to adopt sustainable farming practices, would you use them?

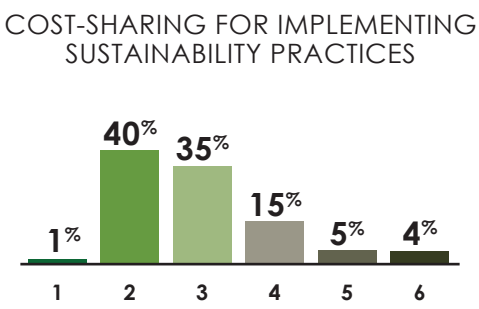


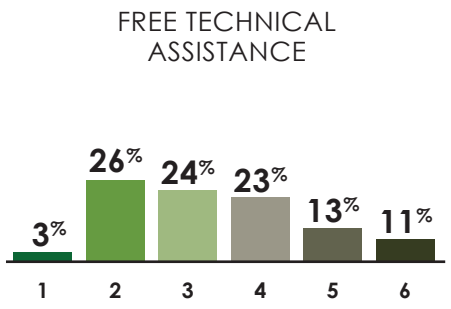
When asked about incentives that would be required "for you to make changes to your management practices to deliver sustainability outcomes," on a scale of 1 (most valuable) to 6 (least valuable), farmers overwhelmingly chose price premium. This indicates farmers' willingness to undertake on-farm changes if it makes economic sense for them.

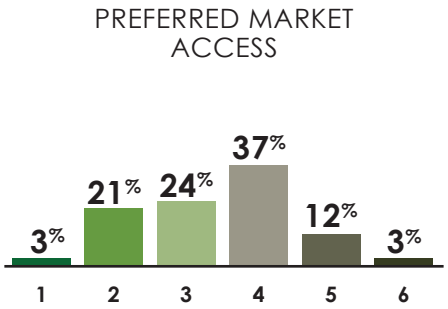
Please rank what incentives a food manufacturer or food retailer would need to offer for you to make changes to your management practices to deliver sustainability outcomes.

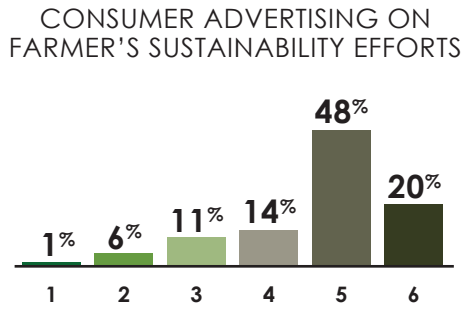


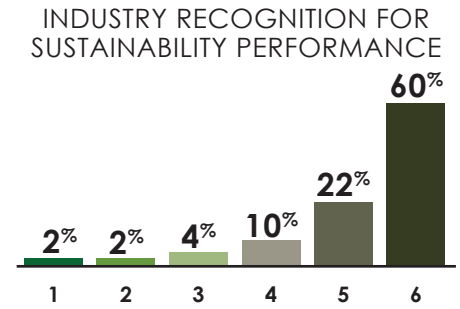










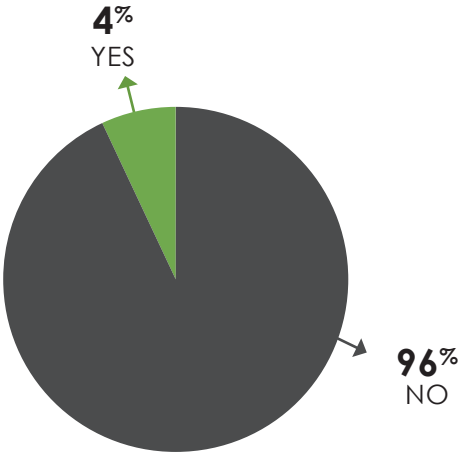


Takeaway No. 4:

Few Farmers Know Their Carbon Footprint, Though They Are Farther Ahead On Other Sustainability Practices

The research found only 4% of farmers know their carbon footprint. Of those who know their footprint, 59% say it is decreasing, 28% say it is staying the same and 13% say it is increasing.

Have you calculated the carbon footprint for your farming/ranching operation?



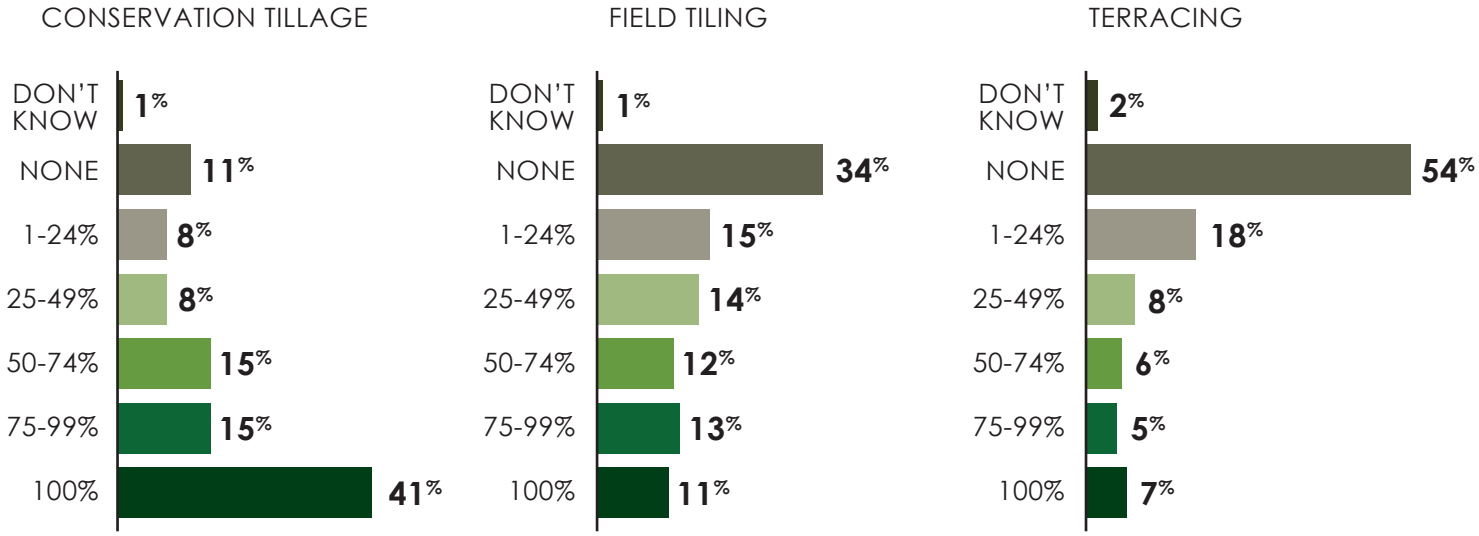
How is your carbon footprint changing?

13% INCREASING

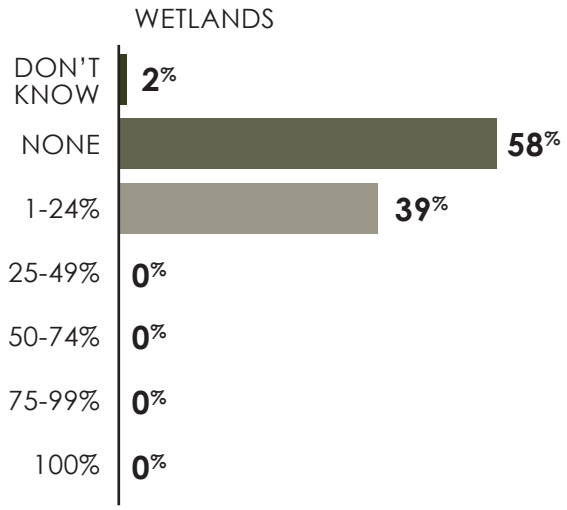
59% DECREASING

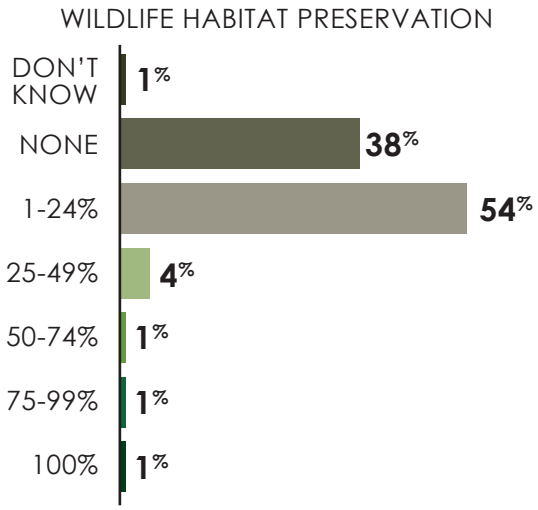
28% STAYING THE SAME

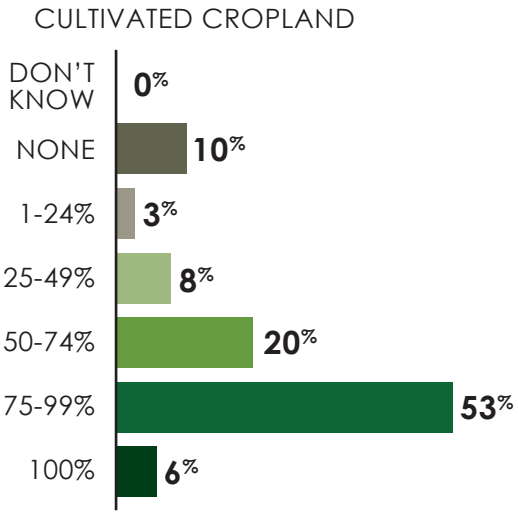
How much of your acreage is managed using:

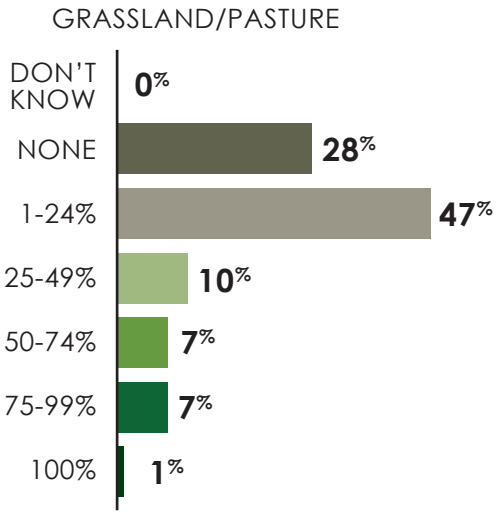


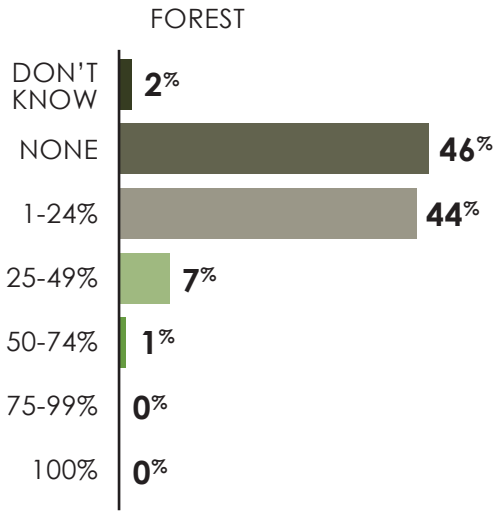
What percentage of your on-farm acreage is devoted to:

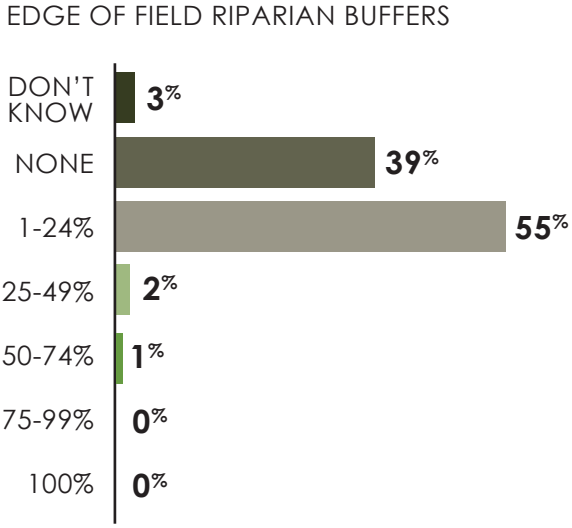


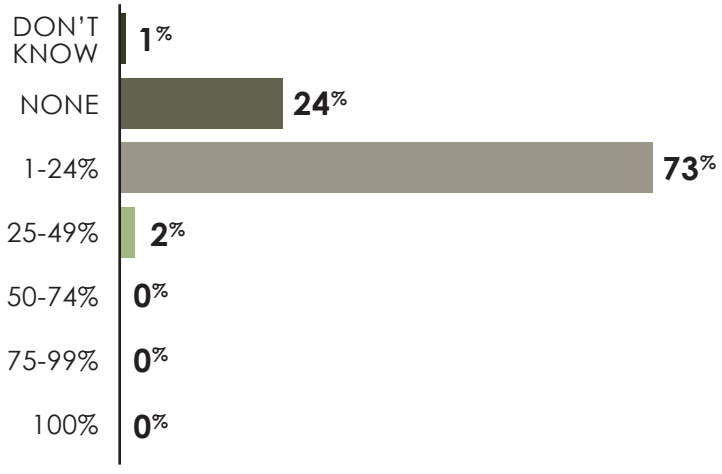






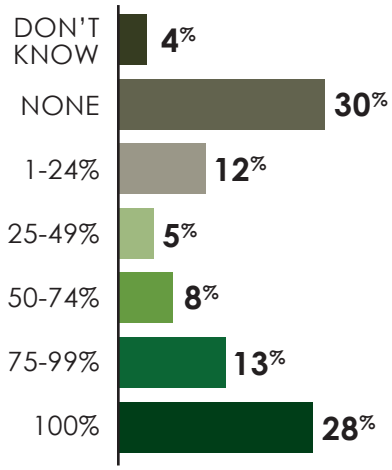




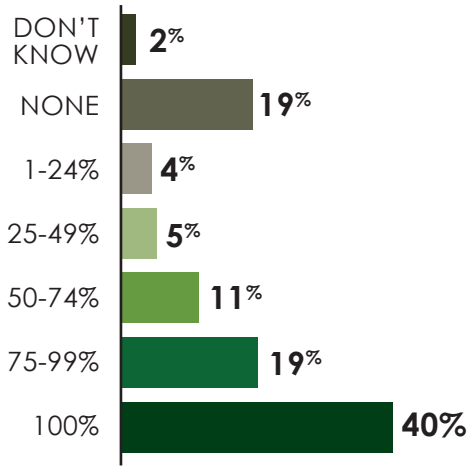


On what percentage of your on-farm planted acreage do you:

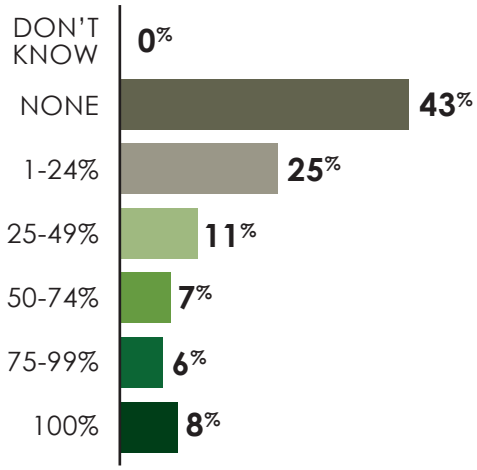
USE INTEGRATED PEST MANAGEMENT



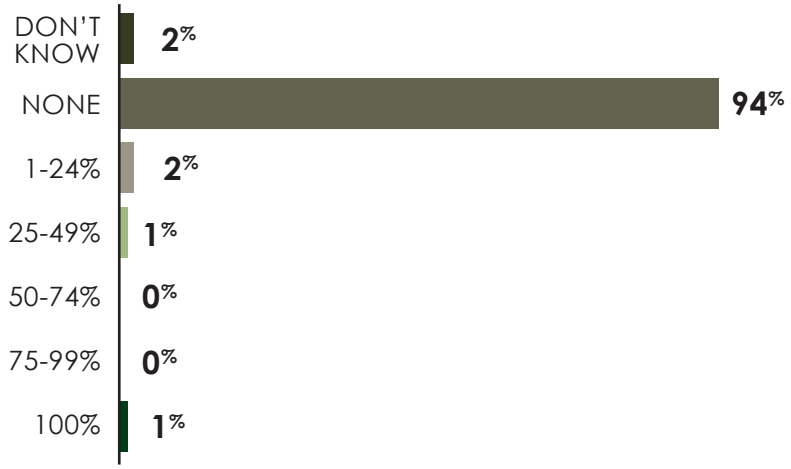
USE GENETICALLY ENGINEERED SEED



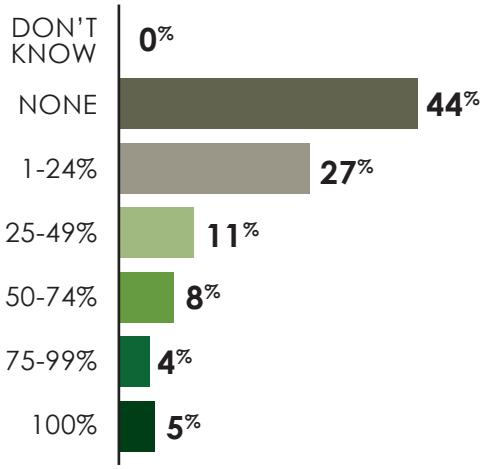
USE MANURE AS FERTILIZER



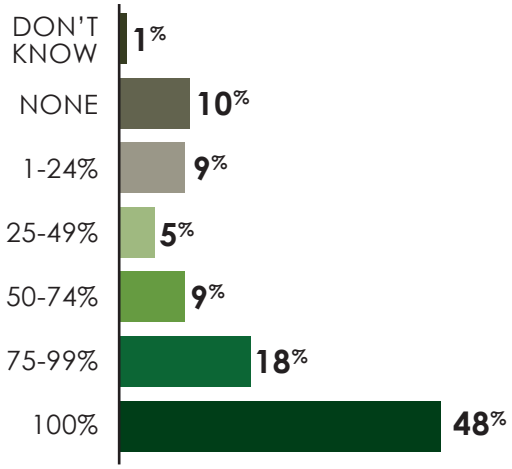
RAISE USDA CERTIFIED ORGANIC CROPS



USE COVER CROPS



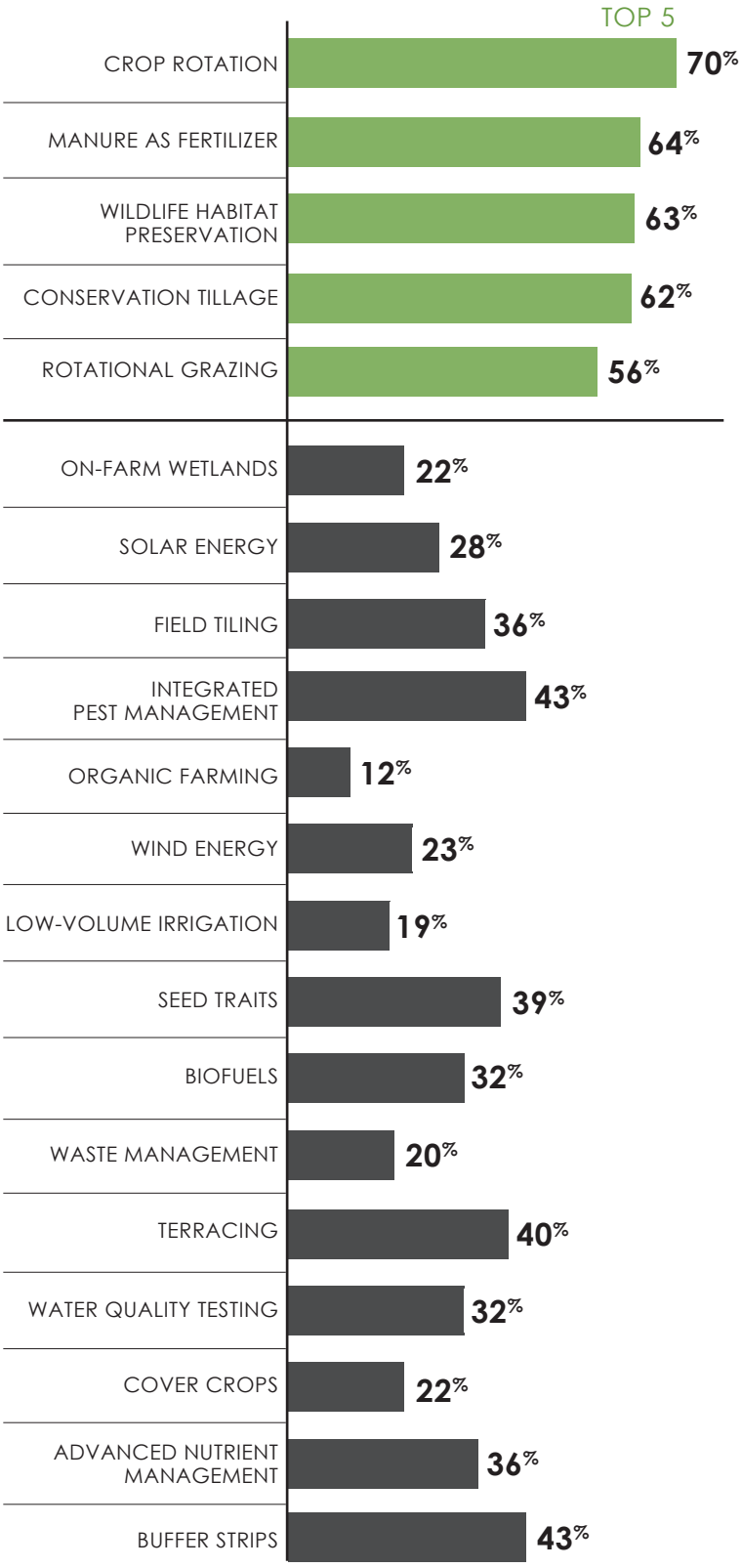
USE SOIL SAMPLING *(Grid or Zone)*



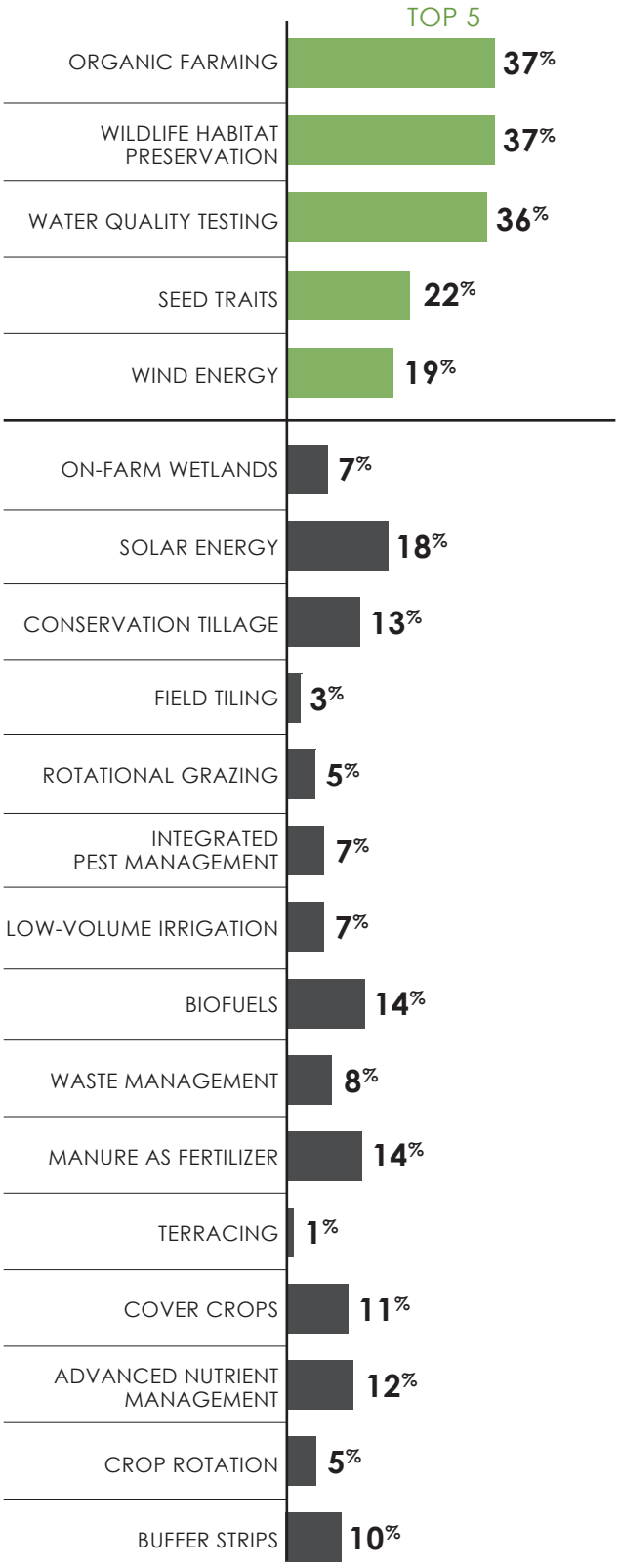
Takeaway No. 5:

Farmers Say Their Definition Of Sustainability Varies From Consumers' Definition

Which of the following criteria **do you associate with sustainable agriculture?**



Of the following sustainability criteria, **which five do you think consumers care about most?**



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