



FOOD from SOMEWHERE

Building food security and resilience
through territorial markets

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EXECUTIVE SUMMARY

It is now clear that progress on global hunger has gone into reverse. The first comprehensive food security assessments since the COVID-19 pandemic revealed that nearly 30% of the world is food insecure, and 42% of people are unable to afford a healthy diet. With around 600 million people projected to be facing hunger in 2030, the world's 'zero hunger' goal is further away than ever.

The troubling data on world hunger tells the story of a global food system that has been buffeted by the pandemic, the Ukraine war, and the escalating climate crisis – and found fundamentally lacking in resilience. Indeed, **the past three years have seen big cracks emerge in global commodity markets and corporate-controlled supply chains:** stalled grain shipments, fertilizer shortages, export bans, volatile food prices, lost harvests, and empty shelves have become the new normal.

Sudden supply disruptions in the COVID-19 pandemic jeopardized Brazilian soy exports, accounting for 34% of global trade. Plant closures and procurement halts in the US forced farmers to cull 10 million hogs and pour away 3.7 million gallons of milk per day. Further market chaos in 2022 saw global food prices spike 15%, undermining the flow of staple food imports to food insecure populations.

These disruptions have shattered any remaining illusions of efficient and frictionless global food supply chains. It is now clear that corporate-controlled global food chains offer a flawed recipe for food security, and are full of risks and vulnerabilities: the exposure of industrial commodity production to climate shocks; the diversion of valuable resources into ultra-processed foods, livestock feed, and fuel; the standardization of diets around wheat, rice, and maize, and the growing reliance on a handful of crops and commodity exporters for global calorie intake; the bottlenecks in fragmented and geographically-dispersed global chains; the vast energy requirements built into high-tech digitalized supply chains – and the dangers of making global food security contingent on 'just-in-time' supply chains that do not work all the time.

New approaches are clearly needed to strengthen food self-sufficiency, enhance resilience to shocks, and rebuild food security on a new basis – as emphasized in growing calls for *food sovereignty*. Interest is now growing in the variety of vibrant food provisioning systems that exist beyond global food chains and corporate control.

Indeed, **vast populations are being fed daily by close-to-home food webs, supply chains and markets** across the world, from public markets and street vendors to cooperatives, from urban agriculture to online direct sales, from food hubs to community kitchens. These diverse webs of 'territorial markets' are based around small-scale producers, processors, and vendors, rooted in territories and communities, and play multiple roles within them.

Following the pandemic, the importance of territorial markets is starting to be recognized. But with corporate chains in crisis, and more shocks to come, it is urgent to enhance our understanding of territorial markets and what they can deliver.

Through a comprehensive global review of these diverse food webs, we found that **territorial markets are the backbone of food systems in many countries and regions**, and make critical contributions to food security, equity, and sustainability, while building resilience on multiple fronts. Key findings include the following:

DELIVERING FOOD AND NUTRITION SECURITY, AND ENHANCING FOOD ACCESS

- **While corporate-controlled global commodity chains dominate land and resources, most of the world is actually fed by food chains that are close-to-home.** Civil society assessments have estimated that over 70% of the world's population is fed by small-scale producers and workers in 'peasant food webs', despite them accounting for less than 1/3 of agricultural land and resources. In some regions the figure may be higher still, with an FAO study noting that small-scale and family farmers produce 80% of the food supply in sub-Saharan Africa and Asia. On average, globally, 80% of cities' food needs are supplied within a 500 km radius. Urban and peri-urban agriculture play a critical role – involving 50% of Latin American and 40% of African city dwellers, and more than a billion people worldwide. Huge volumes of fresh/perishable foods are supplied outside of corporate chains, often direct-to-consumer, with half of fruits and vegetables sold in open air markets in Mexico, community-supported agriculture supplying 1 million Europeans, 25 million Italians buying directly from farmers, and farmers' markets quadrupling in the US over recent decades. While food imports are critical in some contexts, less than a quarter of the calories produced globally cross borders, and the share is even lower in nutrient terms. Global chains account for only 15-20% of total food consumption in Asia and sub-Saharan Africa.

- **Territorial markets play a crucial role in making food accessible and affordable to low-income populations**, helping to shield them from global price volatility. Evidence from low-income neighbourhoods in Asia, Latin America, and Africa shows that fruit and vegetables are more affordable in public markets than at supermarkets. One African study found that supermarket prices are 125% higher. Markets that are located in or near low-income neighbourhoods and offer flexibility – from purchase quantities to pricing and credit arrangements – are well-adapted to the needs of low-income and marginalized populations. In Dhaka, Bangladesh, 95 % of the city’s urban poor purchase most of their food from 400 public markets, which feed some 25 million people every day. In some locations, these benefits are greatly enhanced through vouchers, nutrition coupons, and other initiatives to enhance food access.
- **By providing access to a range of fresh healthy foods, territorial markets also play a key role in supporting dietary diversity and healthy diets.** FAO mapping of public markets in seven countries noted a range from 47 to over 100 kinds of unprocessed foods available across the surveyed markets, per country. Public markets are associated with improved micronutrient intake for lower income groups.

WEATHERING AND ADAPTING TO SHOCKS

- **Close-to-home supply chains and markets are robust and highly adaptable in the face of shocks – critical qualities that were showcased through the COVID-19 pandemic.** Despite market closures, the suppression of street vending, and other unfavourable policies, various territorial marketing channels adapted rapidly and continued supplying food to communities through the pandemic – bringing in new marketing modalities, payment systems (e.g., flexible purchasing options for low-income buyers), and governance models (e.g., shifting to in-situ community certification approaches). Urban and peri-urban food production was critical in supporting urban food security.
- **Through the pandemic, locally-embedded civil society networks were able to scale their activities and play a critical role in emergency food responses.** In the Indian state of Kerala, the local government enlisted the all-women Kudumbshree network to run 1,000 temporary ‘hotels’ that would provide 70,000 subsidized meals every day. In Brazil, 45% of emergency food supply initiatives were based on local supply chains, and over 85% were at least partly agroecological.

BUILDING RESILIENT LIVELIHOODS, COMMUNITIES, AND CULTURES

- **Territorial markets underpin the livelihoods of millions of food producers, generally providing them with decent prices and steady incomes.** Global civil society studies and UN assessments have found these markets to be the most remunerative for smallholders. Thai ‘green’ farmers’ markets offer producers higher margins than big retailers and account for some 60-80% of their income. Available data on community-supported agriculture suggests high economic viability. Dedicated public procurement programmes play a key role in developing stable and sizable markets for small-scale food producers and processors.
- In contrast with corporate chains, **small-scale actors are generally able to diversify, strengthen, and retain control over their livelihoods through close-to-home supply chains and markets.** From planting and harvesting timelines to price-setting, producers, transporters, processors, distributors, and vendors generally have more autonomy. Outside of corporate chains, producers tend to sell through a range of markets and channels, helping to diversify income and mitigate risks. A 12-country study found that agroecological producers bring food to market using 20 different channels, as well as keeping a small share for barter and household consumption.
- By working together through collectives and cooperatives, **small-scale actors have been able to develop their own economically-viable systems for aggregating and bringing food to market.** Some \$80 million of sales have been facilitated, and 175,000 acres of Black-owned land secured, over decades of cooperative-led organizing among Black farmers in the US south. In Brazil, some 4,500 agroecological producer families work together to supply a network of markets.
- Although still facing a number of barriers, **women’s participation and youth involvement is strong in territorial markets,** especially in informal markets and street vending. A 3-country FAO study found that women made up the majority of vendors in local and regional public markets.
- By supporting biodiverse farming and traditional crops, **territorial markets also play a key role in sustaining food cultures** and the associated knowledge and benefits. For example, in Cusco, Peru, women in the Parque de la Papa have their own market, where they share regional products, and exchange and conserve about 2,000 varieties of potato seeds.

- **Close-to-home supply chains and markets build trust, connections, solidarity, and social capital.** Cultural and educational initiatives, collaborative enterprises, and participatory governance approaches are regularly connected with territorial markets – bringing food producers and consumers closer together, and overcoming the alienation of corporate chains and industrial food systems.

SUSTAINING BIODIVERSITY AND ECOSYSTEMS

- **Close-to-home markets and supply chains boost climate-resilience and environmental sustainability by providing outlets for low-input, biodiverse, small-scale food production,** including agroecological systems, and traditional crops with high nutrition and ecosystem value. Urban agriculture helps to maintain agrobiodiversity. Public markets also facilitate the exchange of diverse seeds needed for drought resilience.
- **Territorial markets are generally based on short chains, which reduce food miles.** They also cut food loss and waste by providing outlets for various grades of produce. Targeted public procurement schemes can enhance territorial chains and the benefits they deliver: a meta-review found that sourcing local and organic food enhances economic, environmental, and social sustainability benefits.

In contrast to corporate chains, **a diverse web of close-to-home supply chains and markets is feeding most of the world, reaching low-income populations, sustaining the livelihoods of farmers and communities, nurturing biodiversity – and providing a lifeline to millions of producers and consumers in times of crisis.** Crucially, close-to-home chains are bringing food to market at prices that are accessible to low-income groups *and* remunerative for producers, i.e., the fair prices that corporate chains have systematically failed to deliver.

However, territorial markets are delivering these benefits despite unfavourable policies and economic conditions. These must be reversed in order to unlock the full potential of these markets.

Around the world, **investment and government support has been skewed towards industrial export agriculture, global trade, and large-scale commodity infrastructures,** e.g., highways and transit networks that connect large cities and ports. Meanwhile, informal markets and street vendors lack basic services like clean water and sanitation facilities, while facing unsuitable, corporate-oriented health and hygiene rules – as well as the risk of violent closures and evictions. Wholesale markets have been starved of government investment, despite 80% of food transiting through them in Africa.

Globally, 70% of smallholders' needs for financing go unmet, and in Africa less than 10% have access to formal credit. Without adequate storage facilities, they are forced to sell at low prices when there is a glut on the market. Institutional purchasers like schools and hospitals lack on-site processing capacity, driving them to larger corporate vendors. And along the chain, there is a lack of training and support for operating short chains and food businesses.

In the absence of adequate state support, the economic viability of territorial markets is perpetually strained. These markets can become reliant on external institutions and support structures, while 'produce mafias' can narrow the opportunities for small-scale farmers and vendors. Producer confidence to participate and invest in close-to-home markets can be undermined by unpredictable demand, the difficulty differentiating higher value products, and the time-consuming nature of selling directly to consumers. Although heavily involved in sustaining territorial markets, women's ability to access the more remunerative market opportunities are still constrained in a number of contexts.

As corporate chains spread and displace other modes of food provisioning, corporate power grows. Over time, this allows powerful actors to erode traditional practices and food cultures, co-opt local and territorial chains, and reshape diets around staple commodities and ultra-processed foods – in a context of urbanization and rapidly spreading supermarkets.

There is clearly an urgent need to invest in territorial markets. There is also **huge potential for governments to strengthen and support these markets – making them a cornerstone of food security and climate resilience for years to come.** Pioneering cities and regions have shown that public investment in urban markets and sustainable local supply chains pays off, enhancing access to healthy food, boosting biodiversity, and more. Local authorities have funded key infrastructures for Barcelona's 39 public food markets, which now reach 66% of the city's inhabitants. Through innovative planning policies and local/national support for agroecology and municipal markets, Rosario (Argentina) has become a world leader in urban agriculture and brought food production closer to city-dwellers. Brazil's world-leading anti-hunger policies have transformed the livelihoods of small-scale producers and processors, with school feeding schemes reaching 40 million children, and a requirement for at least 30% of food for public canteens to be sourced from family farms.

A series of **joined-up actions to curb the power of corporate food chains and bring supply chains and markets closer to home** is therefore required to turn the tide on failing food system policies and rebuild food security and resilience worldwide:

- Systematically **use state purchasing schemes to support sustainable small-scale producers** and bring supply chains and markets closer to home; link food access policies to territorial markets; and put pandemic lessons into practice with enhanced planning and shock-proofing of food systems, rooted in strengthening resilient territorial chains and the civil society networks underpinning them.
- Shift subsidies away from the industrial food chain, and **invest in the critical infrastructure, networks, and people that underpin territorial markets** – including protecting and upgrading public marketplaces, support for collectives and cooperatives, subsidies/credit for small-scale food system actors, and public investment in ICT and rural development (including city-rural transit links and social services).
- Protect ‘farmers’ markets’ from corporate cooptation, support participatory guarantee schemes, and develop inclusive governance models to **ensure that markets deliver widespread benefits for local actors**.
- **Push back against corporate capture and cooptation of food systems:** document the inefficiencies, fragilities, and true costs of global corporate food chains; break up corporate retail and supply chain monopolies and crack down on coercive practices; build on growing public awareness to push back against ultra-processed foods and promote healthy, diverse diets; and scrutinize emerging technological trajectories.
- Improve global data and knowledge-sharing on close-to-home food webs; advance multi-dimensional understandings of resilience and food security; **build powerful positive narratives around territorial food markets**, working together with agroecology and food sovereignty movements, and across civil society to communicate a comprehensive vision for the resilient markets, supply chains, and food systems of the future.

Methodology and evidence gathering

'Territorial markets' is an emergent concept. Despite the critical contributions of these markets to food security and resilience, they have received relatively little academic or policy attention. Territorial markets are also highly context-specific and deeply embedded in cultures, communities, and landscapes. Local knowledge and lived experience are particularly important primary sources of information. As such, a key methodology for this report was the convening of three regional dialogues, led by IPES-Food Panel members. In March 2023, virtual gatherings on *'Territorial markets and food system transformation: advancing agroecology, food sovereignty and human rights'* brought together a cross-section of around 100 territorial market actors from 21 countries in Latin America, South and South East Asia, and US/Canada/ Indigenous territories.

With some notable exceptions as referenced in this report, there is a relative lack of distinct, comprehensive, and comparative data that specifically takes a lens of territorial food systems, marketing forms and channels. Yet, relevant documentation of experiences and analysis can be found in closely connected fields such as local food systems, short food chains, traditional/public markets etc. As such, the foundational dialogue material was supplemented by a diversity of academic literature reviews, civil society reports, and case studies. Leaders in the field, including generous engagement from the Alliance for Food Sovereignty in Africa (AFSA), contributed expertise and experience.



INTRODUCTION

BUILDING FOOD SECURITY AND RESILIENCE: AN EVER-MORE PRESSING CHALLENGE

In July 2023, the UN's world hunger update revealed that **more than 2.4 billion people are moderately or severely food insecure**, and more than 42% of humanity – 3.1 billion people – are unable to afford a healthy diet.¹ National governments committed to ending hunger by 2030, as enshrined in the Sustainable Development Goals (SDGs), but the world is clearly headed in the wrong direction.

The troubling data on world hunger tells the story of a global food system that has been buffeted by the COVID-19 pandemic, the Ukraine war, and the escalating climate crisis – and found fundamentally lacking in resilience. Indeed, **the past three years have seen big cracks emerge in global commodity markets and corporate-controlled supply chains:**

stalled grain shipments, fertilizer shortages, export bans, volatile and spiralling food prices, lost harvests, and empty shelves have become the new normal.

“ The past 3 years have seen big cracks emerge in global commodity markets & corporate-controlled supply chains ”

These events form part of a broader pattern – a regular cascade of crises – from natural disasters fueled by climate change and the repeated crossing of planetary boundaries to pandemics, war, and financial disruptions.² Compounded by existing conditions of inequality and discrimination, hunger and poverty have been on an upward trend. With rising urbanization and diets transitioning towards more ultra-processed foods, overnutrition and micronutrient deficiency have added to the widespread triple burden of malnutrition (undernutrition, micronutrient deficiencies, and overnutrition).¹ At the same time, previously self-sustaining rural regions have been undermined by global trade, and are increasingly reliant on national and global food markets.³ These markets and their ‘just-in-time’ (see Box 2), typically concentrated, supply chains can be highly vulnerable to shocks^{4,ii} – and further shocks are the one thing everyone can agree will continue to happen.

These recent events have spurred policy-makers around the world to question how to reduce dependency on volatile global markets and strengthen food self-sufficiency.⁵ Further, they have raised questions about how people are actually fed, and by whom, prompting us to ask: in this century of crisis, **what kinds of food supply chains and markets can build resilience**, and help fulfil the right to food – nourishing people around the world more sustainably and equitably?

Attempts to conceptualize food system resilience are rapidly multiplying, with a number of overlapping definitions and frameworks (see Box 1). Comprehensive understandings are emerging, generally focused on multi-dimensional, multi-level response capacities, and on withstanding shocks

and improving on baseline realities (or ‘building forward differently’),⁶ while articulating resilience and sustainability closely together.

Further, scholars and peasant groups working together have evolved a **decolonial, food producer-centric conceptualization of resilience that embodies resistance and centres autonomy**. They note that food producers have developed resilience by using varied strategies – many rooted in agroecology – to establish degrees of autonomy from volatile input and commodity markets and other unpredictable forces. In this context, peasant resistance (e.g., to land grabbing, corporate consolidation, imposition of intellectual property rights) is understood as building strength to achieve or recover autonomy that protects them from the larger market dynamics that can undermine their livelihoods – thus building resilience.^{iii,iv}

Though social dynamics, including power relations, were not part of initial conceptualizations of resilience,^v **the centering of power is crucial**. When discussing food system resilience specifically, it is key to consider power dynamics, and to explore resilience for whom, and in service of which broader goals? This is especially important in a context where the term continues to be instrumentalized, co-opted, and narrowed by dominant actors (see Box 1). This report is focused on resilience that delivers food security and livelihood and ecological sustainability benefits for the many and not the few – particularly for small-scale food providers and workers, and for other often marginalized populations.

Building on these conceptual advances and their converging foci, in this paper we refer to food system resilience in terms of the following attributes, which are broadly grouped under three headings:

i “The term “triple burden of malnutrition” refers to the coexistence of undernutrition (stunting and wasting), micronutrient deficiencies (often termed hidden hunger), and overnutrition (overweight and obesity)”. In Prentice, A. M. (2023). *The Triple Burden of Malnutrition in the Era of Globalization*. Intersections of Nutrition: Retracing Yesterday, Redefining Tomorrow, 97, 51-61.

ii The COVID-19 pandemic was a prime example of this: not only were global supply chains slow to react to swift shifts in consumer demands, they were particularly affected by logistic disruptions in transportation and production, as well as the export restrictions that were required at the height of the virus spread. OECD. (2020). *Key to resilient supply chains - shock diagnosis*.

iii Peasants may nevertheless simultaneously work within the capitalist economy (e.g., cooperatives selling to large buyers), and resist its domination (see Box 5 for a discussion on capitalism and markets). Santiago-Vera, T., Rosset, P. M., Saldivar, A., Ferguson, B. G., & Méndez, V. E. (2021). *Re-conceptualizing and decolonizing resilience from a peasant perspective*. *Agroecology and Sustainable Food Systems*, 45(10), 1422-1440. ; Santiago Vera, T., Rosset, P. M., Saldívar Moreno, A., & Méndez, V. E. (2022). *Peasant resilience: Decolonization and re-conceptualization*. *Environmental Justice*, 15(3), 179-184.

iv An early contribution to the literature about how to learn from disasters, understand the world differently, and make changes, is Walker, B., & Salt, D. (2012). *Resilience thinking: sustaining ecosystems and people in a changing world*. Island press.

v It is widely understood that resilience thinking started to gain momentum through the study of ecology. Alexander, D. E. (2013). *Resilience and disaster risk reduction: an etymological journey*. *Natural hazards and earth system sciences*, 13(11), 2707-2716.

A first cluster of attributes relates to **RESILIENT LIVELIHOODS, COMMUNITIES, AND CULTURES:**

- **Autonomy and agency.** Individual and community level autonomy and power to exercise voice, make decisions, and act on them.
- **Diversity.** Diversity across the food system (e.g., food types, landscapes, actors, markets, governance) is widely understood as building resilience of food systems to shocks and stresses, and is a key theme across resilience literature.^{vi,7,8,9,10}
- Although rarely made explicit in concepts of food system resilience, **social cohesion and local food cultures** are pivotal for resilience and food security, and relate to several of the attributes in this section.
- **Equity and access.** Food systems that deliver fairness and justice for all, including in terms of access to nutritious food, are key attributes of resilience.

A second cluster relates to **RESILIENT ENVIRONMENTS:**

- **Ecological integrity.** Protecting, maintaining, and restoring the health of ecosystems.
- **Biodiversity.** In addition to the elements of diversity described above, the key role of biodiversity in delivering resilience has been repeatedly underlined,^{11,12} acting as a buffer against environmental and economic risks.¹³

A third cluster of attributes are focused on **WEATHERING AND ADAPTING TO SHOCKS:**

- **Flexibility/Redundancy.** Ability to pivot; food systems that have multiple and diverse parts (e.g., food providers, types of foods, markets, and landscapes), and are often modular rather than centralized, and that can serve the same purpose; also understood as interchangeability or spare capacity^{vii} (e.g., many vendors selling similar foods, many food producers growing similar crops).
- **Management of connectivity:** Nurtures connections in all spheres of food systems (e.g., social, ecological, economic) that reinforce other resilience attributes, while minimizing connections that undermine them.
- **Preparedness.** Being prepared for and flexible in the face of food system change and disruptions; links to climate adaptation.

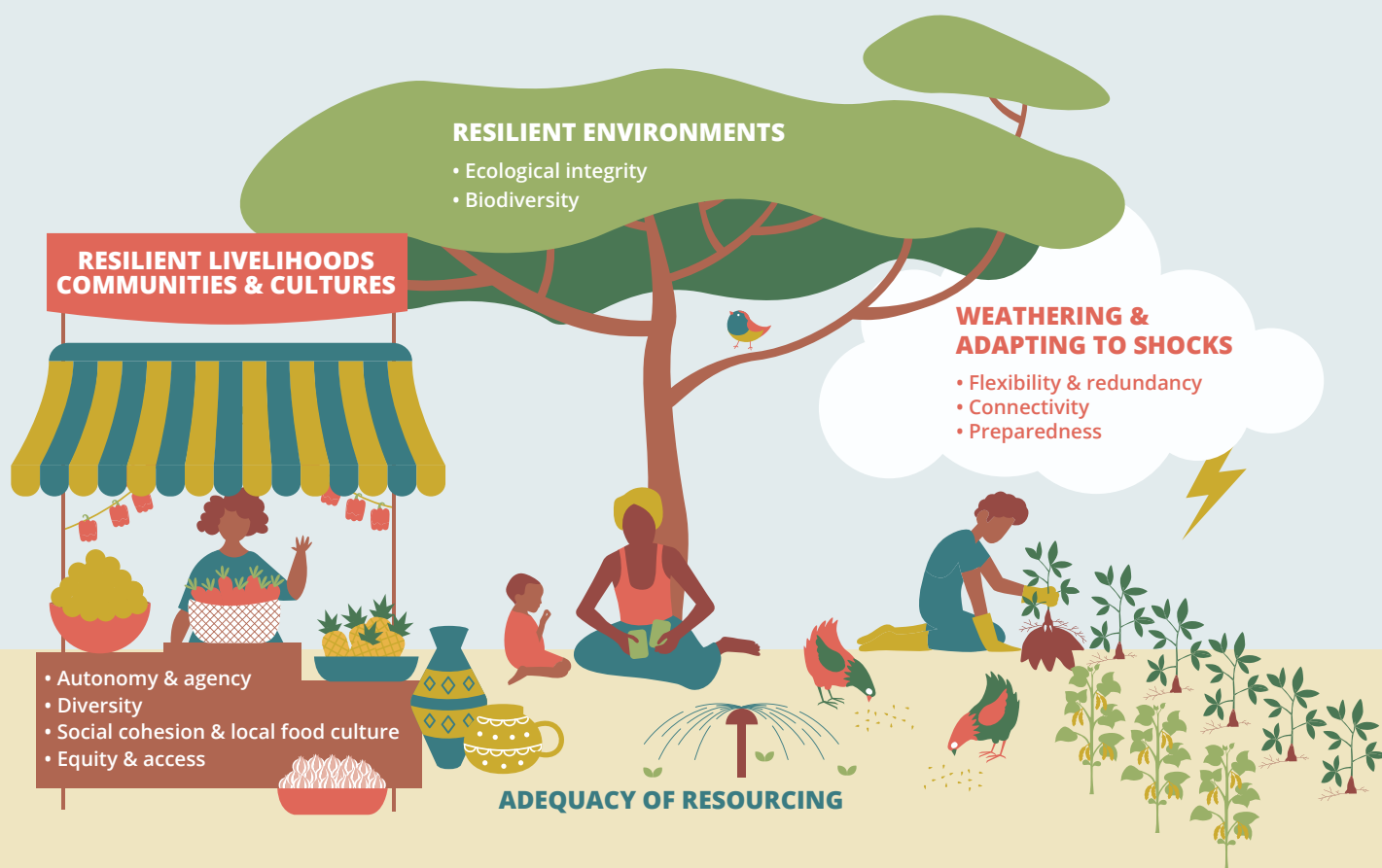
Through the analysis, we also refer to a cross-cutting aspect of food system resilience that is recurrent in the literature:

- **Adequacy of resourcing.** Adequate social, financial, natural, and political resources (sometimes understood as forms of *capital*).

vi The review team that worked on the UNFSS Action Track underlined the importance of diversification as the one central theme. Hertel, T., Elouafi, I., Tanticharoen, M. et al. (2021). *Diversification for enhanced food systems resilience*. Nat Food 2, 832–834.

vii Though redundancy is sometimes considered 'inefficient', a hyperfocus on maximizing "efficiency" has been linked to catastrophe. See Martin, R. (2019). *The High Price of Efficiency*. January–February 2019 issue of Harvard Business Review.

FIGURE 1.
KEY CRITERIA FOR FOOD SYSTEMS RESILIENCE



It is worth noting that a number of these attributes (e.g., equity, biodiversity, ecological integrity) are also important food system goals in and of themselves, and overlap closely with conceptions of sustainable and/or just food systems. In particular, **these resilience attributes overlap closely with the elements of agroecology**,¹⁴ as defined by the FAO. Further, the centering of power relations and attributes like autonomy and agency overlap with the concept of **food sovereignty**.^{viii}

There are also **critical synergies and overlaps with food security**. Emerging conceptions of food system resilience now centre food security within the definitions themselves (see Box 1). It is important to note however, that these definitions broadly reflect a 1996 World Food Summit understanding of food

security,^{ix} grounded in four dimensions: availability, access, utilization, and stability.^x Yet, there is growing recognition that food security includes two further dimensions: agency and sustainability.^{15,16} This broader conception of food security echoes the resilience attributes outlined above, illustrating critical overlap. Given the centrality of food security, in this report it is discussed as a component of resilience, as an outcome of resilience, and as a theme of its own.

While the primary focus of this report is on resilience vis-à-vis markets and supply chains, we are ultimately interested in all of the above qualities and their interactions. We aim to shine a light on, and better understand, the inherent value of territorial food systems and the role of markets within them.

viii Food sovereignty has been conceptualised by *La Via Campesina* and in an Indigenous context (see *Indigenous Food Sovereignty*).

ix “[W]hen all people, at all times, have physical and economic access to sufficient safe and nutritious food that meets their dietary needs and food preferences for an active and healthy life”. “Social” access was added to this definition in 2001. FAO. (2001). *The State of Food Insecurity in the World 2001*.

x “Social” access was added to this definition in 2001. FAO. (2001). *The State of Food Insecurity in the World 2001*.

BOX 1.

RESILIENT FOOD SYSTEMS: DEFINITIONS AND FRAMEWORKS

There are a number of recent scholarly attempts to define and understand food system resilience. For example, John Hopkins Center for a Livable Future states, “A resilient food system is able to withstand and recover from disruptions in a way that ensures a sufficient supply of acceptable and accessible food for all.”¹⁷ They outline various attributes (e.g. diversity, redundancy) which are broadly captured in our aggregated list above.

Meanwhile, an often quoted academic paper by Tendall, D.M. et al. defines food system resilience as “[...] the capacity over time of a food system and its units at multiple levels, to provide sufficient, appropriate and accessible food to all, in the face of various and even unforeseen disturbances.”¹⁸ They introduce resilience, food security and sustainability as complementary concepts, and advance a ‘resilience action cycle’ which includes: robustness; redundancy; the flexibility and thus rapidity with which the food system is able to recover any lost food security; resourcefulness and adaptability.

Within these and other frameworks,¹⁹ there are different analytical approaches for understanding food system resilience. Some focus on principles/attributes/dimensions of resilience itself (e.g., diversity, participation, connectivity, autonomy of decision-making within the system)²⁰ and on various kinds of resilience (e.g., economic, social, ecological);²¹ others highlight abilities to navigate disruptions and stressors that undermine resilience (e.g., anticipation, prevention, flexibility, transformation);^{xi} still others focus on outcomes (e.g., food security);²² and some include a combination of the above,²³ or reframe resilience within a dynamic approach focused on discontinuing persistent (or ‘resilient’) negative pathways.^{xii}

As noted above, however, powerful actors – particularly multinational agribusinesses – often conflate resilience with industry-led innovation and use disruptions to reinforce the status quo. For instance, Syngenta is “accelerating our innovation to provide solutions for farmers to make agriculture more resilient and sustainable,”²⁴ Bayer is providing “innovative solutions that promote sustainable, low-emission and resilient farming,”²⁵ and Tetra Pak Global is “helping build food systems resilience through food processing technology and packaging solutions.”²⁶

Further, critics have noted that resilience framing can be inherently ‘anti-resistance’ and focuses the attention on managing the “disaster that is the global financial crisis” in order to further pursue a neoliberal agenda.²⁷ From this perspective, an unfair burden is placed on smallholder producers, for example, to be resilient in the face of negative impacts they did not themselves cause.^{xiii}

Importantly, in this murky definitional context, the two definitions of food system resilience quoted above (by John Hopkins Center for a Livable Future and by Tendall, D.M. et al), take an explicitly ‘build back better’ approach. The outlined intention is for food systems to come out the other side of shocks and stressors able to provide sufficient and appropriate food to all – clearly not an existing baseline reality. As underlined by the John Hopkins Center for a Livable Future: “food system resilience work can help build more equitable, just, and prepared food systems rather than preserving what is harmful.”^{28,29}

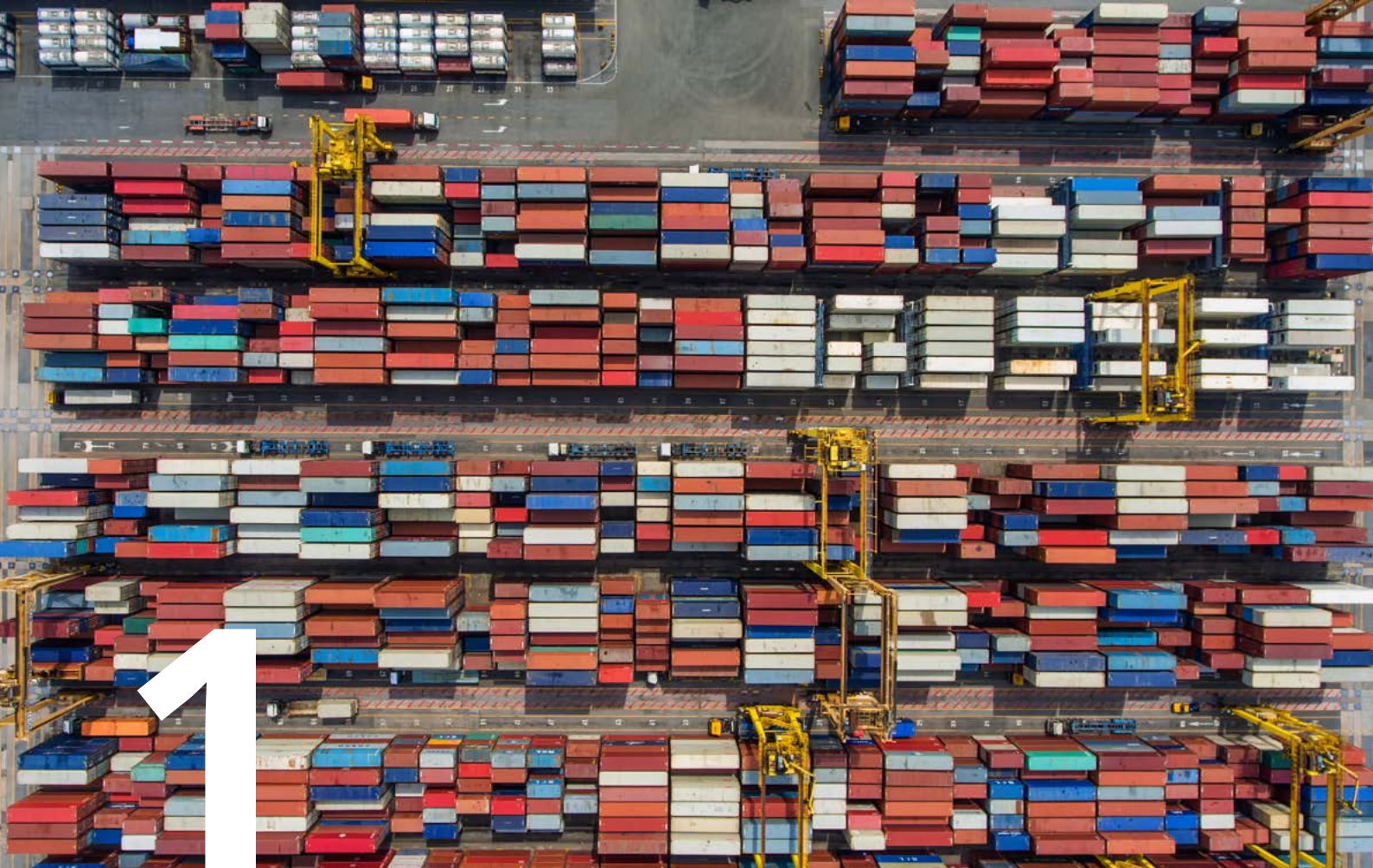
xi For instance, the 2021 UN Food Systems Summit devoted Action Track 5 to resilience, distinguishing five capacities of resilient food systems to deal with changes or shocks: to anticipate, to prevent, to absorb, to adapt to an evolving risk, and to transform in cases where the current food system is no longer sustainable. See UN Food Systems Summit. (2021). *Action Tracks*. Action Track 5: Build resilience to vulnerabilities, shocks and stress.

xii Reframing resilience as part of a “dynamic sustainabilities” approach takes account of complexity, uncertainty, different narratives, and power relationships, and seeks to avoid pathways that allow negative dynamics to persist, or go in undesirable directions. See Leach, M., Stirling, A. C., & Scoones, I. (2010). *Dynamic sustainabilities: technology, environment, social justice*.

xiii For example, ‘resilience’ should not be used in a way which places undue burdens on those facing the harsh end of disruptions that they themselves did not cause. See Moore, E. et al. (2022). *Food System Resilience: A Planning Guide for Local governments*. John Hopkins Center for a Livable future.

Although they are by no means exhaustive, these converging understandings and key attributes are taken forward and used in this paper as a broad set of benchmarks, as we examine relationships between food supply chains/markets, and food security and resilience. In Section 1, we look first at *corporate value chains*, scrutinizing how the long, highly concentrated, and corporate-controlled global supply chains that dominate today's global commodity trade affect the resilience of food systems. Subsequently, in Section 2, we explore a diversity of territorial

marketing forms and channels, and then in Section 3, we hold up 'territorial markets' against those same resilience criteria, referring to the vast majority of food marketing forms and channels that are to greater or lesser extents outside of corporate value chains. In Section 4, we consider the barriers to more resilient markets, supply chains and food systems, and finally, in Section 5, we identify a series of leverage points for strengthening territorial markets and reinforcing their role as the cornerstone of future food security and resilience.



HOW CORPORATE VALUE CHAINS UNDERMINE FOOD SECURITY AND RESILIENCE

In order to understand the different ways in which food reaches populations, and their differential implications for food security and resilience, the 'value chain' concept is a useful one. The term, emerging through well-established frameworks of *value chain analysis*, refers to the full range of activities that actors engage in to bring a product to market.³⁰ However, these frameworks are often weak on how power relations shape value chains.^{xiv} Building out this analysis, we focus here on *corporate value chains*, referring to the vast majority of global value chains that are based on broadly industrial production methods (or 'industrial

agriculture'), dominate food commodity trade/distribution, and are managed and controlled by large corporations. Although there are many grey areas and overlaps between different supply chains and markets, it is possible to identify a specific set of dynamics inherent to these chains – especially as key processes and power relationships are reinforced by the rapid integration of new technologies. In Section 1.1, we describe the key dynamics in corporate value chains, and then in Section 1.2 we consider how these chains perform vis-à-vis the resilience attributes listed above.

xiv There are some notable exceptions including: Ebata, A., MacGregor, H., Loevinsohn, M., Win, K. S., & Tucker, A. W. (2020). *Value chain governance, power and negative externalities: What influences efforts to control pig diseases in Myanmar?* The European Journal of Development Research, 32, 759-780.

1.1 WHAT ARE CORPORATE VALUE CHAINS AND HOW DO THEY OPERATE?

Activities within corporate value chains stretch from the production of agricultural inputs on one side of the planet (e.g., mining for fertilizer minerals), through to food production, trade, processing, distribution, sale, and disposal in many other locations. **In a corporate value chain, firms engage in hundreds, even thousands, of activities in the process of converting inputs to outputs.** Raw and partially finished materials cross borders many times as they move through the steps of preparation, processing, packaging, and delivery. For instance, approximately fifty ingredients are found in a standard North American cheeseburger, sourced from every continent except Antarctica.³¹

However, even those listed ingredients do not record the **extensive parallel coordination of “intermediate” goods necessary for growing and processing each of these ingredients** in an industrial food system – such as chemicals, enzymes, veterinary drugs, or specialized machinery. Keeping food fresh, preventing the growth of pathogens, and controlling for flavour all add to the need for complex refrigeration and preservative systems as well as reagents, machinery, and record-keeping for safety checks required for trade in food products.³² Even basic upstream activities like seed breeding can be split into geographically dispersed stages, bringing further trade linkages and sanitary considerations into play. For example, Dutch companies multiply vegetable breeder seeds in Tanzania in one season, then bag and ship them north to be planted in a different hemisphere later the same year.³³

While fragmented into multiple stages and world regions, these chains are also characterized by **standardization of what is produced and brought to market, and hyper-concentrated control and ownership.** Although corporate value chains extend around the world, network analysis has found that just eight countries overwhelmingly dominate the agrifood trade network (UK, US, China, Russia, Germany, Netherlands, Brazil, and Italy) – each trading with at least 77% of other countries.³⁴

Further, there is huge and growing market concentration at every node of the chain. By 2019, just seven grain traders controlled at least 50% of the global grain trade,³⁵ while six major corporations control 78% of the agrochemical market, and 58% of the commercial seed market.³⁶

At the same time, the top eight carriers of freight account for more than 80% of the market for ocean freight capacity.³⁷ Globally, 1% of the world’s largest farms control 70% of the world’s farmland.³⁸ And just three companies control the vast majority of poultry genetics, with two industrial breeders providing most of the genetic stock for the world’s chicken broiler industry.³⁹ In terms of fish, aquaculture now produces half of all seafood and is more highly concentrated than capture fisheries, with three countries producing 73% of farmed fish, crustaceans, and molluscs.^{xv}

Corporate value chains are also defined by their **increasing reliance on control, surveillance, and automation technologies.** From one end of the food chain to the other, agrifood industries are combining digital tools with new biotechnologies in what has been called a ‘biodigital’⁴⁰ vision for the food system. This includes extensive use of data-driven algorithmic technologies such as artificial intelligence (AI) and blockchain (distributed digital ledgers), combined with increased sensors, automation, robotics, and drone technology. For instance, the world’s commodity traders are restructuring the middle of global food chains around the Covantis blockchain while attempts are underway to implement end to end food chain blockchains, such as the TraceHarvest blockchain pioneered by Bayer, to maintain traceability from seed to stomach.⁴¹ Increasingly, corporate chains require inputs that depend on genetic and molecular redesign of seeds, biological sprays, environmental microbes, and food ingredients, including manufacture of so-called ‘alt proteins’ (engineered substitutes for animal source foods). Tyson Foods, Kraft Heinz, Nestlé, and Walmart are among the many companies already using or testing out blockchain technologies.⁴²

xv China 56%, India 10%, and Indonesia 6%. FAO. (2024). *Fishery and Aquaculture Statistics – Yearbook 2021*. FAO Yearbook of Fishery and Aquaculture Statistics.

1.2 CORPORATE VALUE CHAINS AND FOOD SYSTEM RESILIENCE

Through the evolving structure and operating principles of these chains, multinational agribusinesses and food corporations are offering their recipe for ‘resilience’ – one that requires major scrutiny in a context of cascading commodity trade disruptions, rising global hunger, and ratcheting pressures on food producers. Below, we consider the impacts of these chains on food security, sustainability, equity, and the various dimensions of food system resilience as outlined in the Introduction.

IMPLICATIONS FOR FOOD SECURITY

Access, equity

Despite claiming to deliver food security, **corporate value chains don’t ‘feed the world’, and generate major risks and vulnerabilities.** As alluded to above, corporate value chains are not fundamentally designed in order to nourish people, nor to ensure *access* to food. The global data bears out the relatively low contribution of these chains to world food security, despite the claims of leading corporations.^{xvi}

“**Corporate value chains are not fundamentally designed to nourish people, nor to ensure access to food**”

For instance, a huge share of the food produced in corporate value chains is diverted to bioenergy and animal feed,⁴³ or converted into energy-dense,

nutrient-poor foods – including, increasingly, ultra-processed foods. Some estimates put the contribution of these chains to food security as low as 30%, with the majority of people being fed by a range of other means (as explored in Sections 2 and 3), and many simply lacking in adequate nutrition.^{xvii}

Further, the World Trade Organization (WTO) estimates that a minority of people – 1 in 6 – depend almost entirely on global trade to be fed.⁴⁴ Yet, despite these generally lower levels of exposure to international food markets, network analysis shows that low-income and food insecure countries integrated into global value chains can be particularly badly hit by a food shock on the other side of the planet (in part because wealthier countries can hoard or buy reserves),⁴⁵ demonstrating negative impacts on *equity*.

Further implications of corporate value chains for food security are explored in the sections below, in relation to other resilience attributes, including livelihoods, ecological integrity and biodiversity, and weathering and adapting to shocks.

IMPLICATIONS FOR RESILIENT LIVELIHOODS, COMMUNITIES AND CULTURES

Autonomy and agency, diversity, equity and access

Corporate value chains are undermining equity and autonomy through the conditions they impose on food producers and workers. As described above, a handful of powerful agri-chemical and input firms dominate food systems.⁴⁶ These powerful commercial entities have captured controlling positions in corporate value chains with one or few sellers dominating supply (monopoly) and/or a handful of buyers dominating demand (monopsony).^{47,48,49} In particular, they are able to exercise outsize power over farmers’ production choices. For example, as explored in the recent IPES-Food report *Land Squeeze*, corporate land acquisition and land-grabbing for industrial

xvi For example, see the webpage “[Nourishing the World](#)” by Cargill, one of the ABCD companies dominating agrifood systems, in which they state “Cargill has a unique ability to improve food security and nutrition”; See Bayer’s “[How we can feed the world - and prevent food loss](#)” and their webpage “[The world is growing hungrier for solutions](#)” where they say they are working with smallholders to “feed an increasingly hungrier world”. This narrative is echoed by multilateral institutions, such as the OECD that stated “[m]uch of the food we eat each and every day arrives to our grocery stores, restaurants, refrigerators and plates thanks to trade.” on their webpage “[How we feed the world today](#)”.

xvii For an analysis of competing claims and the basis for this 30% estimate see: ETC Group. (2022). *Small-scale peasants still feed the world: explaining competing claims of 70% vs 30% and why it matters*.

production is rife, limiting land access for small-scale farmers.^{50,51}

Further, commodity traders and big industrial livestock firms behave as monopsonies at local levels, pushing down prices for small-scale operators and undermining their livelihoods, as well as driving them into unsustainable modes of production or poor animal welfare practices (see below).⁵² Modern slavery has been well documented in industrial-scale, long supply chain fishing, fish processing, and aquaculture, with examples from Asia related to debt bondage, isolation, forced labour, and child labour.⁵³

“**Modern slavery has been well documented in industrial fishing value chains**”

Consolidation and concentration also characterize the retail environment in a number of contexts.

Supermarkets and hypermarkets are spreading globally, and the dominant players are amplifying their reach by investing in food production and processing ('vertical integration'), and buying up smaller chains of shops ('horizontal integration').⁵⁴ In the United States, for example, Walmart's share of the grocery market has risen to 30%, with the top five companies taking nearly 65% of the food retail market.⁵⁵ IPES-Food's report on global concentration in the food system details both the negative livelihood impacts on producers and on the domestic and overseas workers supplying major supermarket chains.⁵⁶

As e-retail grows, there are new erosions of working conditions. For example, the food delivery market is dominated by big multinational players like Uber Eats and Bolt, with food delivery 'gig economy' workers^{xviii} generally being vulnerable to exploitation and lacking basic employment guarantees and social protections.⁵⁷

Autonomy and *equity* are also being threatened in a broader sense by a whole raft of **technologies that may undermine the ability to govern corporate value chains in an equitable and transparent way.**

For example, biotech 'solutions' depend on complex proprietary supply chains and built-in mechanisms of legal control and monopoly – as evidenced by challenges in the global effort to deploy COVID-19 vaccines.⁵⁸ Moreover, the biosafety and biosecurity challenges, as well as societal impacts arising from next generation biotech (such as CRISPR/Cas-9 genome editing and synthetic biology) are substantial, with governance frameworks failing to keep up.⁵⁹ Even more challenging are what are termed "Black Box" risks related to the increasing use of artificial intelligence, and the inability to track how machine-learning decisions are made.

IMPLICATIONS FOR RESILIENT ENVIRONMENTS

Ecological integrity, biodiversity

The extractive and intensive nature of corporate value chains has devastating effects for *ecological integrity and diversity*, with further impacts on *equity* and *adequacy of resourcing*, thereby undermining food system resilience in multiple powerful ways. Extractive practices are part and parcel of industrial agriculture and corporate value chains, which have spread around the world depending on where corporations have been able to find low wages, weak labour and environmental laws, access to land and raw materials, and tax breaks.⁶⁰ This global sourcing approach – which can involve sending raw ingredients out of the country (and world region) for processing, only to ship it back to the origin country for consumption – also drives up food miles, the majority of which occur during the transportation of raw ingredients and inputs.⁶¹

The practice of breaking down supply chains into many steps and parts is often framed as 'efficiencies' yet comes at high societal and environmental cost. Industrial livestock production – with crops separated from livestock, and genetically uniform animals 'factory farmed' in intensive conditions – is an integral part of hyper-specialized and geographically dispersed corporate chains.

xviii The gig economy refers to work performed on an on-demand basis, most often on behalf of intermediary digital platforms which connect individual workers with customers. The lack of a standardized definition reflects the contested status of its workers – as contractors, employees, entrepreneurs, etc. – and their associated rights and benefits. See ILO. (2021). *The role of digital labour platforms in transforming the world of work International Labour Office*. World Employment and Social Outlook 2021.

The confinement of large numbers of genetically-uniform animals, and the rapid turnover required by industrial livestock chains, create the conditions for diseases to spread between animals, and from animals to humans ('zoonotic spillover'), leading to outbreaks, epidemics, and pandemics.^{62,63}

Monocropping of feedstocks – accounting for one third of global crops – drives massive biodiversity and habitat loss.^{xix} The rise of food and feed monocultures, and the concomitant loss of diverse local crops, also exacerbates vulnerability to climate change,⁶⁴ as well as reducing the range of foods available to consumers.

New technologies are also compounding the resource usage and ecological footprint of corporate value chains, thereby amplifying their threat to food system resilience. Blockchains and AI in particular, which are presented as a means to better manage the food chain in face of crises,^{xx} depend on very large numbers of parallel computers, and require high amounts of uninterrupted energy use for data processing and computation, as well as huge amounts of water. By 2027, AI's global freshwater needs will be equivalent to 50% of total UK freshwater usage.^{xxi,65} These technologies may replace existing risks with new and additional ones, rather than advancing genuine remedies.

Further, **the erosion of biodiversity and agrobiodiversity is reshaping diets and critically undermining food cultures**. As described above, a handful of crops dominate global trade flows, structuring local diets and food market conditions.⁶⁶ Many populations still rely on local foods, yet the promotion of the 'global standard diet' is rapidly crowding out these diverse food cultures – with knock-on health and cultural impacts. Wheat, rice, and maize now make up an estimated nearly 50% of global calorie intake.⁶⁷ A wide range of agricultural, culinary, dietary, and cultural knowledge is being lost, and with it, key facets of resilience.

“ **By 2027, AI's global freshwater needs will be equivalent to 50% of total UK freshwater usage** ”

And while there is consensus that human and planetary health would be served by a dietary shift away from industrially produced meat and ultra-processed foods,⁶⁸ these items are instead heavily subsidized⁶⁹ and fiercely promoted.⁷⁰ Corporate interests are working hard to expand new, speculative markets for heavily processed, higher protein foods – securing subsidies and investments.⁷¹

IMPLICATIONS FOR WEATHERING AND ADAPTING TO SHOCKS

Flexibility/redundancy, managing connectivity, preparedness

Over recent decades, the expansion of industrial export agriculture and corporate chains has left countries reliant on a handful of countries, corporations, and crops for basic staple foods, and a handful of specialized links from one region to another – with high risks of bottlenecks and chokepoints.⁷² In this context, **a pandemic, hurricane, or political crisis in one place can delay or destroy the growing season or delivery of food elsewhere**.

During the 2008 food price crisis,⁷³ at the start of the COVID-19 pandemic,⁷⁴ and in response to food price spikes in 2022,^{75,76} dozens of countries banned food exports, with disastrous impacts for low-income, import-dependent countries.

xix Additionally, demand for soybean for livestock is a significant contributor to deforestation and rights abuses in the Brazilian Amazon and the Cerrado. See Heinrich Böll Stiftung, Friends of the Earth Europe & Bund für Umwelt und Naturschutz. (2021). *MEAT ATLAS: Facts and figures about the animals we eat*.

xx Further, blockchain is being widely hyped as the answer to issues of trustworthiness, traceability and food safety in long, corporate food chains. See following article highlighting related incentives, trust, community management, regulation and speculation challenges: Ashford, C. (2018, April 30). *Blockchain and sustainability – should you believe the hype?*. In Eco-Business. See following article on the commodification of trust that is built into corporate blockchain applications: Plüss, Sonja Muriel. (2022, September). *Trust the food chain, trust the blockchain*. In Allegra Lab.

xxi Crypto assets alone already use more electricity than large industrialized countries such as Australia and Argentina. See Ober, K. & Collins, C. (2023, March 16). *Where cryptocurrency, water and conflict collide*. In United States Institute of Peace.

BOX 2.

“JUST-IN-TIME” SUPPLY CHAINS

‘Just-in-time’ is a supply chain logistics strategy which prioritizes reducing inventory stockpiling and set-up times by relying on supply chain partners to provide materials right before they are needed, thereby reducing associated costs, such as storage.⁷⁷ In this model, wholesale and retail buyers depend on third-party logistics (3PL) providers for the consolidation and transportation of products across manufacturing, processing, and retail stages. This system emphasizes rapid and repeated inventory movement over maintaining large stock quantities.

At its core, just-in-time represents the financialization of supply chains, prioritising economic efficiencies over risk mitigation. While this strategy can offer significant cost-savings in the short- and medium-term, it creates high exposure to supply chain disruptions and sudden spikes in demand.⁷⁸

The invasion of Ukraine by Russia demonstrates the impact of conflict on food flows, with disruption of exports exacerbated by grain hoarding and commodity speculation, and the impact felt most acutely by low-income, importing countries.⁷⁹ Indeed, a review of food systems shocks over 53 years found that **high dependence on some countries for food supplies “highlights future vulnerability”**, and identified geopolitical and climate-related risks as major and growing threats.⁸⁰

How *connectivity* is managed has major implications for the ability to weather shocks, and ultimately for food security. In a context of globally integrated food trade and high import dependencies, there is significant connectivity (between world regions, between potential buyers and sellers), but the events of recent years have shown that **this form of global connectivity cannot easily be buffered or managed, leaving small-scale food producers vulnerable to market volatility, as well as disrupting critical food flows.** Further, corporate chains undermine the kinds of beneficial local connectivity – within and between communities and regions, and among food producers and other people – that underpin resilience (see below).

Further, recent food shocks have shown that **corporate chains undermine resilience by eroding redundancy and flexibility through just-in-time sourcing approaches** (see Box 2). While this approach may create ‘flexibility’ for the corporate buyer, it exposes whole food provisioning systems to shocks and therefore reduces options – and undermines resilience – for the populations relying on those chains. As governments and populations discovered amidst the empty shelves of the COVID-19 lockdowns (see Box 3), it is challenging to maintain a just-in-time food supply when it depends on fractured and specialized sourcing across complex global supply chains.^{xxii} These risks are amplified as new technologies are further embedded into corporate value chains. Maintaining digital devices, components, telecommunications networks, satellites, and data server farms, as well as biotechnological facilities, all involve complex global infrastructures that dwarf existing agrifood value chains in their complexity, and may increase vulnerability to shocks and failure along the chain.^{xxiii,81} Though some digital tracking technologies are intended to minimize these risks, digital infrastructures are also vulnerable to more significant failures (see Box 4).

xxii In early 2020, with planes grounded, the Canadian government sweated over how to access the quarter of a million queen bees annually air-transported from Australia to ensure that fruit and canola could get pollinated in time. Bixby, M. E. F., Polinsky, M., Scarlett, R., Higo, H., Common, J., Hoover, S. E., Foster, L. J., Zayed, A., Cunningham, M., & Guarna, M. M. (2021). *Impacts of COVID-19 on Canadian Beekeeping: Survey Results and a Pro-Itability Analysis*. *Journal Of Economic Entomology*, 114(6), 2245-2254.

xxiii Additionally, concentration, extraction, and exploitation are widespread, both in terms of the sourcing of rare earth metals, copper, chemicals, and plastics, and in the control of production of chips and circuitry required for these technologies. See The Free Library. *Toxic technology: electronics and the Silicon Valley*. Retrieved April 28, 2023.

Further, as described in the analysis above, **corporate food chains critically undermine food system resilience in ways that create vulnerability to shocks, and ultimately undermine food security.**

Corporate value chains are sprawling, energy-intensive endeavours that can fall apart at multiple points under stress. These chains are fundamentally lacking in the resilience attributes that would make them more shock-resistant (*diversity, autonomy, preparedness, redundancy, and well-managed connectivity*), relying

instead on a handful of countries, corporations, and crops and a high-risk just-in-time sourcing approach.

Despite these risks and negative outcomes, **corporate value chains continue to grow, and in doing so they consolidate further power and resources in the hands of dominant actors**, threatening not only resilience but also democracy, and posing major challenges for government oversight of food systems.

BOX 3.

CORPORATE SUPPLY CHAIN BREAKDOWNS: EXAMPLES FROM THE COVID-19 PANDEMIC AND THE RUSSIAN INVASION OF UKRAINE

In **the US**, during the pandemic, supply chains struggled to adapt to changing circumstances. For instance, a sudden stop in dairy purchases by restaurants and schools forced farmers to dump up to 3.7 million gallons of milk a day, while in parallel, retailers faced supply shortages and had to limit consumer milk purchases.⁸²

The shutdown of meatpacking plants due to COVID-19 outbreaks created bottlenecks which rippled across supply chains. In **Germany**, a single plant closure impacted almost a fifth of the country's pigs,⁸³ while the closure of Tyson and JBS plants in the US forced farmers to cull an estimated 10 million pigs.⁸⁴

In early 2020, with planes grounded, the **Canadian government** faced significant delays and disruptions in accessing the quarter of a million queen bees annually air-transported from Australia to ensure that fruit and canola crops are pollinated in time.⁸⁵

COVID-19-related labour shortages and heavy rains in **Brazil**, which produces 34% of the world's soy, caused export delays. China, which receives 73% of Brazil's soybean exports,⁸⁶ requested grain traders and food processors to stockpile soy and other grains in anticipation of a possible second coronavirus wave.⁸⁷

Russia's invasion of Ukraine destabilized global supply chains for wheat, maize, and fertilizer, with knock-on effects in soy and rice markets. **Global food prices** in 2022 rose by 15% from the previous year.⁸⁸

BOX 4.

CYBER-ATTACKS AND SYSTEM FAILURES: RESILIENCE UNDER THREAT IN DIGITAL FOOD CHAINS

As corporations digitalize more and more of the global food system infrastructure, we can expect these data systems to be increasingly susceptible to significant failures, with the length and frequency of cloud and internet outages already rising.⁸⁹ Digital infrastructure is climate-vulnerable in terms of flood, drought, fire and extreme heat.^{90,91} The digitalization of global value chains also means that hackers, corporations, and nation states can now access and immobilise digital farm machinery remotely, and the FBI says cyberattacks on agricultural companies during critical planting and harvest times are surging.^{92,93}



WHAT ARE TERRITORIAL MARKETS?

For decades, dominant economic actors have argued that the spread of industrial agriculture and corporate value chains is inexorable, and represents the only answer to global food security challenges. The same actors have systematically sought to undermine markets outside of corporate chains, dismissing them as backward or unhygienic. For example, as initial evidence linked the emergence of Covid 19 to wet markets in Wuhan, China, harmful generalizations were made about the purported biosecurity risks of informal markets, leading to widespread shutdowns.^{94,95,96}

However, the **increasingly visible weaknesses in corporate chains are prompting a rethink**, calling the prevailing narratives and assumptions into question, and bringing renewed attention to other potentially more resilient ways of producing food and bringing it to market.

Clearly, **a very significant share of food production and provisioning – as much as 70%^{xxiv} – continues to take place largely or wholly outside of corporate chains**, in what can be understood as *territorial food systems and territorial markets*.

xxiv ETC Group. (2017). *Who Will Feed Us? The industrial food chain vs. the peasant food web. 3rd edition*. The peasant food webs in question include food produced by farmers and home gardeners, fished and harvested in rivers and oceans, gathered in forests and along the edges of fields, grown on rooftops and reclaimed lots, hunted on savannahs, raised in grasslands, foraged in jungles and on mountains and more. The 70% figure is contested. See ETC Group. (2022). *Small-scale peasants still feed the world: explaining competing claims of 70% vs 30% and why it matters*. and La Via Campesina. (2022). *We Feed the World!*.

BOX 5.

MARKETS AND CAPITALISM

Markets, where food and more are exchanged and traded, have existed for millennia. Farmers coming together 5,000 years ago along the banks of the Nile to sell their produce is commonly cited as the earliest known instance.⁹⁷ Farmers' and peasants' markets, souks, fairs, and bazaars serving local communities and emerging urban centres arose and flourished on every continent. High-value and luxury food products were exchanged and traded across long distances, including the spice routes linking East and West⁹⁸, the trans Saharan salt trade⁹⁹, and Mayan and Aztec cacao trading.¹⁰⁰

Yet, place-based markets were and remain central to how most of the world eats. In different times and across different urban and rural habitats, diverse economic, social, cultural, and political forces have shaped how these food markets operate. Individuals, communities, collectives, companies, and the state were and are some of the actors exercising power in these markets.

Currently, capitalism is the dominant economic paradigm, and private companies are amassing power.^{xxv} This tends to render socio-political relations between humans invisible, for instance by making inequality seem natural, and by masking the indispensable role of government support that must come in to fill crucial gaps. In this context, it is important to differentiate between markets and capitalism. The 20th century French thinker, Fernand Braudel, advances that 'the market' is characterised by common experience, openness, small profits, supply-and-demand determined pricing, controlled competition, involvement of ordinary people, and is a liberating force, whereas 'capitalism' is characterised by speculation, opacity, exceptional profit seeking, power determined pricing, elimination of competition, hegemonic power and monopoly-seeking. Capitalism is both anti-competitive and anti-market.¹⁰¹ Within Braudel's framework, modern corporate food value chains have characteristics which situate them within capitalism, while diverse, smaller, place-based market forms sit outside of it. For example, the urban territorial markets profiled by the Alliance for Food Sovereignty in Africa (AFSA) are characterised by a multitude of actors, making small livelihoods, and selling according to supply and demand.¹⁰²

Another characterization of non-capitalist markets is through the persistence or re-emergence of traditional market forms. For example, the Chalayplasa barter markets in the Peruvian Andes are restoring ancient, pre-capitalist exchange practices which embed social values including reciprocity, inclusivity and solidarity.¹⁰³ One way this is experienced in these Indigenous marketplaces is that quantities are adjusted when one party to the exchange is experiencing hardship.

Pathways away from capitalism have also been conceptualised by social scientists looking beyond economic analysis. Autonomy has been identified as both a key tool that creates pathways away from capitalistic and extractive market forms, and as an outcome of participation in diverse types.

Concretely, this autonomy can be expressed pre-market in control over land, inputs, and the ability to organize collectively, and at the market itself in terms of governance and price-setting. Cooperatives can be an expression of this. Dutch cooperative shops, for example, are organized to mobilise collective power, to exercise autonomy from credit and private profit-seeking, and in so doing to protect and prioritize their land and labour.¹⁰⁴

Patel and Moore's useful recent framework understands capitalism as a way of organising the relations between humans and the rest of nature. More than just an economic system, capitalism is a force which constantly seeks out new frontiers in the accumulation and concentration of wealth. The natural frontiers which capital breaks through include the life and wellbeing of humans, of biodiversity on land and sea, of climate limits, and now of technological and genetic limits.¹⁰⁵

xxv Raj Patel and Jason Moore posit that in the 21st century "it's easier for most people to imagine the end of the planet than to imagine the end of capitalism." Patel, R., & Moore, J.W. (2018). *A History of the World in Seven Cheap Things: A Guide to Capitalism, Nature and the Future of the Planet*. University of California Press.

In this section, we explore the territorial markets concept, and provide a general overview of the various territorial marketing channels. In Section 3, we consider how they contribute – individually and collectively – to food system resilience, food security, and beyond.

Although the conceptual boundaries of territorial food systems and territorial markets can be defined in a variety of ways by different actors (see Box 6), it is possible to identify common threads as a basis for analysing these systems collectively. Based on the emerging literature and insights from the IPES-Food dialogues, in this report territorial food systems and territorial markets are understood to refer broadly to:

- **‘Closer to home’** (local and regional) webs of food provisioning that are **largely or fully outside of corporate chains**, and characterized by shorter food chains¹⁰⁶ as a key mode of organization (although not necessarily limited to highly localized exchanges – see Box 6);
- **Spaces where relationships are built** (sometime called ‘relational proximity’)¹⁰⁷ among actors involved – particularly between food producers and consumers – enabling the development of trust, solidarity, and fairness;
- Markets/systems that involve **smallholders and other small-scale actors** (e.g., traders, transporters, processors) in **positions of significant autonomy**, and **characterized by diversity** (actors involved, seasonally/culturally/ecologically-specific kinds of foods sold, etc.);
- Markets/systems that are **multi-functional**, extending beyond economic exchange, and performing a range of additional functions (e.g., social, cultural, medicinal, spiritual, supporting Indigenous and traditional knowledge as well as community development) in their communities and territories;
- Food provisioning webs that cover a **spectrum from formal to informal**; where *territorial food systems* are concerned, the concept includes a whole range of market and non-market components.

“As much as 70% of food production & provisioning happens within ‘territorial food systems’ and ‘territorial markets’”

While there has been growing interest in food production paradigms that break with the industrial model (e.g. agroecology, regenerative agriculture), there has been relatively little mainstream policy attention to territorial markets, and the diversity of market forms, marketing channels, and supply chain arrangements outside of corporate chains.^{108,109} It is critical to understand these markets – and the opportunities and challenges they face – given their centrality in feeding people and supporting livelihoods, and especially in light of the growing question marks about the resilience of corporate supply chains.

The diversity of food provisioning webs around the world makes it **challenging to develop analysis that reflects the entirety of territorial markets**. Further, they are often defined in terms of what they deliver (e.g., ‘more remunerative for smallholders’) or by the way they are governed (see Box 6), creating additional challenges in terms of drawing boundaries, and distinguishing between *characteristics* and *impacts*.

In light of this, and the gaps in comparative and comprehensive data, we do not purport to deliver an exhaustive resilience analysis. Rather, using food system resilience attributes as a guide, we seek to paint as full a picture as possible of territorial markets, and in particular the benefits/value of territorial markets as understood by those participating in them. To construct this picture, we draw on literature on urban agriculture, agroecology, peasant and smallholder agriculture, local food systems, short supply chains, and value chain analysis, as well as emerging literature focused specifically on territorial markets and food systems – reflecting the diversity of entry points as to how actors in these markets identify and draw boundaries around their activities. Further, we emphasize participatory assessments, case studies, and lived experience, in particular the perspectives shared through three regional dialogues conducted by IPES-Food.

BOX 6.

TERRITORIALITY, TERRITORIAL FOOD SYSTEMS, AND TERRITORIAL MARKETS: FLUID DEFINITIONS

There are numerous conceptualizations for what ‘territory’ means with regards to food systems. Territorial boundaries can be determined by geographic considerations (e.g., an ecosystem, forest or watershed; or miles or kilometres from food source), cultural aspects (e.g., a common spoken language), or shared social struggles. Food system actors in some smaller countries, provinces, states, municipalities, and districts may use administrative borders. However, in many cases territorial food systems do not align with legal boundaries, and may in fact cross national borders.^{xxvi,110}

Food territories can also be described as ‘social constructs’,¹¹¹ or ‘functional landscapes’,¹¹² bringing together actors (e.g., social movements, coops, local government, producers, consumers) to build agency and initiatives around a common territory and the local knowledge, culture, resources, and relationships within it.^{113,114} In cases where communities are under threat or unsupported, the territory may also be a site of resistance and struggle for rights and survival.¹¹⁵ Importantly, food territories are also dynamic and fluid, as a result of seasonality and the migration of people and animals, with urbanization, climate change, and migration flows rapidly accelerating the pace of change.¹¹⁶

These fluid understandings of territoriality underpin emerging concepts of *territorial food systems* and *territorial markets*, as the terms gain momentum in civil society and policy discourse.^{xxvii} *Territorial food systems* include both market and non-market aspects, covering everything from short food supply chains, sustainable public procurement and civil food networks,¹¹⁷ to bartering and trading food within and between communities.^{118,119,120} Crucially, they also centre the concept of *entitlement*-based social policies¹²¹ where sufficient, healthy, and culturally-appropriate food for all is understood and advocated for as a human right.

In particular, there has been growing attention to territorial markets in civil society and academic inquiry, and in select policy spaces. Notable contributions to understanding and defining the term include a foundational 2016 report by the Civil Society and Indigenous Peoples Mechanism of the Committee on World Food Security (CSIPM), the FAO territorial markets initiative, ongoing research and analysis by the Alliance for Food Sovereignty in Africa (AFSA), and the work of the High-Level Panel of Experts on Food Security and Nutrition of the UN Committee on World Food Security (HLPE). Growing non-profit¹²² and academic literature has also contributed rich perspectives.^{123,124,125,126,127} While some use territorial markets to refer just to public markets,¹²⁸ others use the term to refer to a broader set of food marketing/provisioning channels – in some cases focusing specifically on markets that represent a clear counterpoint to corporate value chains.

As summarised above, definitions of territorial food systems / territorial markets converge on a number of common characteristics, including associations with short chains, multifunctionality and the diversity of market participants^{129,130,131,132}, which encompasses – as one African study notes – small-scale producers, fishers, pastoralists, cooperatives and farmers organisations, Indigenous people, transporters, bulk buyers/retailers/traders/vendors, consumers, processors, government, urban authorities, private sector, NGOs, and donors.¹³³

xxvi For example, the Kadutu farmers market, which links Democratic Republic of Congo, Rwanda, Burundi, and Uganda. See Alliance for Food Sovereignty in Africa. (2022, August). *African Territorial Markets: Characteristics, challenges, opportunities and recommendations*. Shared with IPES-Food by AFSA.

xxvii See the FAO's Territorial Markets Initiative; Fakhri, M. A. (2021). *Trade Agenda for the Right to Food* where the UN's Special Rapporteur on the Right to Food defends territorial markets at the UNFSS; One Planet's discussion of [territorial markets for a healthy diet](#); the Nyéléni network's recognition of resources on territorial markets; Committee on World Food Security. (2015). *Connecting smallholders to markets*. Policy recommendations; Civil Society and Indigenous Peoples' Mechanism for relations with the Committee on World Food Security. (2016). *Connecting smallholders to markets: an analytical guide*.

The following excerpts give further insights into the fluid ways in which territorial markets are conceptualized by different actors:

- **FAO 2023:** “Territorial markets are typical of short food supply chains, which are generally characterized by the involvement of few intermediaries, as well as by geographical and cultural proximity, trust and high social capital. They promote family farming, market inclusivity for small-scale entrepreneurs and producers, and a direct relationship between consumers and producers, as well as improved availability and accessibility for healthy and diversified diets at territorial level”.¹³⁴
- **State of Food and Nutrition in the World 2023:** “Territorial markets refer to markets that are directly linked to local, national and/or regional agrifood systems, and which are mostly organized horizontally among the various stakeholders. They have multiple functions (economic, social, cultural, etc.) in their respective territory beyond food supply, and are the most remunerative for smallholder farmers.”¹³⁵
- **CSIPM - Key features of territorial markets:**
 - “They are directly linked to local, national and/or regional food systems: the food concerned is produced, processed, sold or distributed and consumed within a given “territory”; the gap between producers and end users is narrowed; and the length of the distribution chain is significantly shortened or even direct.
 - They are inclusive and diversified with a wide variety of agricultural and local food products to the marketplace, reflecting the diversity of the food system(s) of the territory.
 - They perform multiple economic, social, cultural and ecological functions within their given territories - starting with but not limited to food provision.
 - They are the most remunerative for smallholders since they provide them with more control over conditions of access and prices than mainstream value chains and more autonomy in negotiating them.
 - They contribute to structuring the territorial economy since they enable a greater share of the wealth created to be retained, redistributed, and returned to farm level and local economies.
 - They may be informal, formal, or somewhere in between. To varying degrees, all have some links with the relevant public bodies and the state through tax collection or through public investments.
 - They include embedded governance systems meaning that they operate according to a set of commonly shared rules that are negotiated between producers, consumers and the local authorities of the territory concerned (local, departmental/provincial, national and regional).
 - In addition to serving as spaces in which supply and demand are matched up, they are places where political, social and cultural relations play out, and where all people involved interact according to varying degrees of interdependence and solidarity.”¹³⁶

Below, we identify a **spectrum of territorial market forms and marketing channels which embed smaller-scale, non-corporate food provisioning to a greater or lesser extent**. These forms and channels are grouped broadly into the following categories according to the key actors, interactions, and dynamics at play:

- Mass marketing spaces** that bring together large numbers of producers and consumers, including public/traditional markets, wet markets, and specialized/regional/temporal variants (e.g., agroecology markets, weekly markets, roadside markets), informal markets and street vendors, aspects of wholesale markets, and supermarket sales of local products;
- Direct to consumer** marketing channels beyond mass marketing spaces, including farmgate sales and farm shops, Community Supported Agriculture and artisanal fisheries, and some forms of digital sales that are based on relationships (and not controlled by corporate actors);
- Bulk community sales** to for-profit and non-profit procurers including food hubs, co-operatives and networked markets and local independent businesses;
- State food purchasing and marketing initiatives** including state distribution, market support and public procurement initiatives.

As will be explored below, these channels are highly varied, ranging from intentionally non-corporate, producer-and civil society-managed spaces to footholds for closer-to-home food provisioning in hybrid, state-led, and even corporate-dominated

channels. Further, there are considerable overlaps between these market forms – which are ultimately fluid and socially constructed – while many food providers use more than one form of marketing.

FIGURE 2.

TERRITORIAL MARKETS: A BROAD SPECTRUM OF CHANNELS FOR FOOD PROVISIONING



2.1 MASS MARKETING SPACES

PUBLIC/TRADITIONAL MARKETS. All over the world, food is marketed and sold in a range of formal and less formal retail food markets that are open to the public.^{xxviii} Sometimes simply referred to as ‘the market’, other names capture particular characteristics. For example, at ‘farmers’ markets’, ‘popular markets’, or ‘peasant markets’, producers are often selling directly to consumers, while ‘wet markets’ typically involve live animal sales. These markets are particularly important for fresh/perishable foods, centring fruit and vegetables, as well as meat, fish, and dairy.¹³⁷

Globally, these markets are often primary vehicles for small-scale producers to sell a diverse array of products, either directly or via intermediaries (such as traders, middlemen, cooperatives) to local populations.¹³⁸ However, these markets can also include a mix of trader, wholesale (see below), longer-distance, and corporate and non-corporate players and products.

In many parts of the world, particularly in the Global South, traditional public markets appear to be resurgent and are a crucial route for food access, despite the threats posed by the spread of supermarkets and corporate value chains. In a 2022 report on six major urban markets in Africa, with further evidence from 23 countries, the Alliance for Food Sovereignty in Africa (AFSA) highlighted that this market form is growing and gaining recognition from governments.¹³⁹ In Mexico, despite a continent-wide decline in traditional outlets,¹⁴⁰ open-air markets account for half of all fruit and vegetables that are sold through retail. In Kenya, Zambia, and Nicaragua, over 90% of all fruits and vegetables for household consumption are purchased in traditional rather than corporate retail outlets.¹⁴¹ In the Global North, ‘farmers’ markets’ appear to be thriving, with some 25 million Italians estimated to be buying food directly from farmers.¹⁴²

Farmers’ markets in the US have more than quadrupled in recent decades to over 8,600 currently registered in the USDA Farmers Market Directory.¹⁴³

Specialty markets, such as those featuring agroecological products, exist independently, within other traditional/public spaces, or alongside them.¹⁴⁴ In Thailand, movements around small-scale sustainable food production have led to farmer-organized ‘green farmers’ markets’, now present in almost every province, usually in space provided by the municipality.^{145,146} Some of the markets use Participatory Guarantee Systems to differentiate their higher-value products (see Box 9). Barter/exchange markets are another variant, playing a key role in Indigenous food systems and other settings (see Section 3).¹⁴⁷ In some cases, clear-cut ways to protect and promote market space for smaller-scale vendors have been established, for example by ensuring that only these farmers can set up or supply stalls,¹⁴⁸ or by setting aside clearly-indicated areas of the market for smaller-scale local farmers.

“ In Mexico, open-air markets account for 50% of all fruit & vegetables that are sold through retail ”

Overall, public markets vary greatly in the extent to which they serve corporate/territorial chains, and in many cases, there is potential for further delineation.

WHOLESALE MARKETS. Wholesale markets – often functioning as part of public markets, alongside direct-to-consumer sales – sit in the middle of the food chain, and play a critical role in regional distribution,^{xxix} and in moving fresh produce to urban populations.

xxviii The ownership and governance of these markets is highly varied including both public, private, and cooperative ownership and management. They may operate in the open-air, indoors, or in combination, and in facilities provided by the municipality or other public or private entities. Although the borders are fuzzy, “informal” markets are described below in a sub-category with street shops and vendors.

xxix Kadutu market in Bukavu City, Democratic Republic of the Congo (DRC), for example, is a hub for provincial and cross-border trade to other markets in eastern DRC and neighbouring Rwanda, Burundi, and Uganda. Alliance for Food Sovereignty in Africa. (2022, August). *African Territorial Markets: Characteristics, challenges, opportunities and recommendations*. Shared with IPES-Food by AFSA.

The World Union of Wholesale Markets estimates that 200 million tons of fresh produce passes through wholesale markets every day.¹⁴⁹ In Latin America and the Caribbean, for example, 70-80% of all fruits and vegetables pass through wholesale markets.¹⁵⁰ There is big variation in the terms of trade offered to producers, the length of the chain, the types of producers serviced, and the governance of these markets, but broadly speaking they are horizontal, multi-actor spaces that challenge corporate domination of the food chain.^{151,152} Usually public municipal infrastructure, or a public-private partnership, their viability is threatened by lack of investment and privatization along the food chain (see Section 4).

INFORMAL MARKETS AND STREET VENDORS.

Particularly across the Global South, the food environment in cities and towns includes a wide range of dynamic informal and semi-formal markets, and street shops and vendors. Since these informal food retailers are highly varied, and largely unregistered and unregulated (although not necessarily illegal), the sector is challenging to categorise and measure. There is certainly overlap between 'Public/traditional Markets' and 'Informal Markets', including in contexts where the latter are well-established and tolerated. Their wares include fresh produce, processed food sold in small quantities, and cooked food and meals. The provenance is varied – and thus territoriality is hard to estimate – with own produce, re-selling from public markets, wholesale and supermarkets, and local, national, cross-border, and international networks cited as sources for these sellers.^{153,154,155} Women predominate as vendors in many contexts, and the sector provides an important source of employment, although too often lacking in support, protection, and access to basic services like water and sanitation.¹⁵⁶ Globally, an estimated 2.5 billion people eat street foods every day.^{157,158}

“ In Latin America and the Caribbean, for example, 70-80% of all fruits & vegetables pass through wholesale markets ”

SUPERMARKET SALES. Supermarkets clearly do not display the characteristics of the close-to-home markets described above, and are closely connected to corporate value chains. However, they sometimes stock and brand “locally-sourced” foods and/or host periodic car-park “farmers’ markets”, providing sales channels for small-scale producers. For example, through the Landmarkt program in Germany, local producers in Hessen stock over 200 Rewe supermarkets, representing 5% of total sales. The producers establish prices and are responsible for the logistics until sale, as well as waste management, with the supermarket taking a flat fee of 20% of the retail price.^{159,160} See Box 7 for more discussion of “local food” and its appropriation by corporate players.

2.2 DIRECT TO CONSUMER MARKETING CHANNELS

FARMGATE SALES/ FARM SHOPS. In contrast to public markets, where producers take their food to consumers, a number of marketing channels exist whereby buyers come to the producers, including farm shops and farm-gate sales. Although there is scant data on these forms of marketing, they appear to have experienced growth in a number of contexts through the pandemic, with evidence primarily from high-income countries. In 2020, one third of all fruit and vegetable farms in Canada had an on-site stand, with half of these offering delivery service.¹⁶¹ In the US, local on-farm stores or stands are the most popular form of direct-to-consumer sale of local food, followed by farmers’ markets.¹⁶² Direct to consumer sales were USD 3.26 billion in 2022, although this represents a tiny fraction of the more than USD 850 billion in total sales by grocery retailers.^{163,164} Cooperation – among producers, among consumers, and between producers and consumers – is a hallmark of these marketing forms and often a key to their viability. For example, the Landwinkels Country Shops in the Netherlands, a self-financed co-operative of 89 farm shops that markets food from farms in the network, has grown steadily and flourished during the COVID-19 pandemic.¹⁶⁵

BOX 7.

DISTINGUISHING 'LOCAL' FROM 'TERRITORIAL'

While there is significant overlap between territorial markets and 'local' food, there are also important conceptual and real-world distinctions:

- As seen above, territorial food systems encompass local, regional and transborder food systems. Many territorial markets trade food from a wider geographical area than is commonly understood as 'local'.
- 'Local food' often connotes a geographical determination alone (e.g., the '100-mile diet'), missing the multi-functional richness of territoriality explored in this report. For example, food produced and marketed locally may be entirely embedded in corporate value chains.
- In many contexts 'local' branding is not regulated, leaving it vulnerable to being used to hike up prices and/or for green-washing purposes. In the US, for instance, so-called 'local' food may be sourced many hundreds of kilometres away, include non-local ingredients, or simply refer to where corporate headquarters are located. The Oakland branch of the Whole Foods supermarket chain labelled their cashew-based yoghurt substitute as "local" because the manufacturer is based in nearby San Francisco, although the nuts come from Vietnam or Ivory Coast.^{166,167}

COMMUNITY SUPPORTED AGRICULTURE. Community Supported Agriculture (CSA) is a longstanding and resurgent direct-to-consumer mechanism. Through CSAs, consumers – often organized in a form of cooperative – buy an advance share in the harvest, providing a guaranteed income to producers and sharing the risks. The Japanese *teikei* movement of the 1960s and 1970s is recognized as the origin of CSA,¹⁶⁸ and the format soon emerged in Europe. In the US in the 1960s, southern Black farmer Dr. Booker T. Whatley developed 'clientele membership clubs' which were the beginning of CSAs in North America.¹⁶⁹ There are now programs in every world region.^{170,171} More than 6,000 initiatives serving one million people are recorded in Europe alone.¹⁷²

DIGITAL SALES. The pandemic unleashed massive growth in global food and beverage e-commerce, increasing by 86% in dollar value from 2019 to 2021.¹⁷³ Expanding e-retail channels have been dominated by major corporate players, with Walmart accounting for over 25% of online grocery sales in the US.¹⁷⁴ Nonetheless, a diversity of online platforms are now directly connecting sellers with buyers, in some cases helping small-scale producers to sell directly or through cooperatives at prices they control.¹⁷⁵ In Pursat province in Cambodia, for instance, boat-dwelling women have formed the O Taprok Association to buy and process local fish into sauces and smoked and fermented products, extending the income earning potential of what is otherwise a seasonal harvest. The

association markets the products using WhatsApp, and receives electronic payments. Food is delivered to customers through a network of motorcycle taxis, buses, and inter-province taxis, where the deliverers get paid better than 'gig economy' workers. Middlemen are not needed, and the women have jointly created a savings group with their income.¹⁷⁶ Meanwhile, Indigenous producers in the US – 36% of whom were facing a loss in workforce and 53% either partial or full closure of their businesses – used the pandemic to shift market channels, including by strengthening their presence online. Tribal governments developed policies and programs to embed these initiatives in the social fabric, for instance the Native Foods Connection program, the "Made/Produced by American Indian" certification, and the Native Farm Bill coalition.¹⁷⁷

2.3 BULK COMMUNITY SALES

Though wholesale markets are the primary aggregator for territorial markets, other local bulk buyers and community networks, both for profit and non-profit, play important roles in 'close-to-home' food systems.

FOOD HUBS. Food hubs are generally understood as aggregators and distributors that centre locally-sourced food, usually with social and multifunctional intent. Their scale, though modest, enables them to

have storage and processing space that individual operators lack. They are garnering increasing attention in the Global North as a way to connect purchases to smaller-scale local food production. For instance, food hubs in the US are steadily growing in number with more than 400 in the USDA's registry. The majority are non-profit, and the remainder are usually socially-inclined businesses.¹⁷⁸ Now dominated by white actors, their roots are in the Black cooperatives, hubs, and food sheds in the Southern US.¹⁷⁹

COOPERATIVES AND NETWORKED MARKETS.

Territorial food distribution and marketing is sometimes organized through cooperatives and their dedicated infrastructures, allowing small-scale producers to aggregate their production across territories and beyond, and facilitating collective price-setting and supply management, as well as opening up multiple specialized and mainstream sales outlets.

In some cases, cooperative-led marketing is based on adherence to key values and principles (e.g., organic, agroecological). For example, in Argentina, the Unión de Trabajadores de la Tierra has created networks to directly supply consumers through more than 150 marketing "nodes" or distribution points, eight agroecological warehouses, several agroecological markets – and, during COVID-19, through 'sovereign' food canteens.¹⁸⁰ Resources are pooled to finance the cooperative and prices are decided collectively by Unión members. In other cases, cooperative structures are allowing small-scale organic/agroecological producers to aggregate their production across wider geographical scales. In Brazil, the O Circuito, Rede Ecovida de Agroecologia connects geographically spread-out peasant markets. Produce is moved between warehouse and market stations and substations, increasing the diversity and reliability of supply. Organized in local and regional nodes, this decentralised network links some 4,500 small-scale producer families, with representatives assigned to central decision-making bodies. Together, they certify agroecological produce and sell to 120 local markets, a regional supermarket, and local and regional school meal programs.^{181,182,183}

In the US, consumer-owned, worker-owned, and hybrid cooperatives in the food wholesale and retail sector are managing to compete with corporate chains at scale. For example, Minneapolis-St Paul hosts a cooperative wholesaler that sources from among local, smallholder, and organic growers and processors to supply the Twin Cities consumer cooperatives,^{xxx} as well as the headquarters of the National Cooperatives Grocers network whose members have 2.5 billion in sales.¹⁸⁴ In parts of Europe, co-ops enjoy significant grocery market share including the Netherlands (10%), Sweden (36%), and Finland (46%).¹⁸⁵ While cooperatives are generally more focused on close-to-home supply chains and are more likely to embrace fairer and healthier food system approaches, some are deeply embedded in the industrial food system.¹⁸⁶

INDEPENDENT LOCAL BUSINESSES AND COMMUNITY ORGANIZATIONS.

Local independent grocery stores are also key aggregators, and play a role in pushing back against corporate power in the marketplace.^{187,188} Again, there is huge diversity in this category, with some overlap with street vending as described above, and proxy data at best. In the US, independent "natural" retailers are falling behind compared to chain retailers, both in terms of general sales and for "natural and organic food",¹⁸⁹ in a broader context of continuing concentration in the retail sector.¹⁹⁰ Similarly, in Brazil only 7.1% of food is now retailed through small shops and other outlets, with supermarkets capturing 92.9% of total sales. This reflects the accelerated food supply chain concentration experienced across the Global South over the last decades, stifling retail diversity.¹⁹¹

Other local businesses, like hotels, caterers, company canteens, and restaurants buying from local producers are another territorial market channel. As with public procurement discussed below, there are efforts to support local sourcing by private businesses, in line with consumer preferences.¹⁹² Chefs have made a notable contribution by championing local produce and recipes and expanding the market in some territories, including through the Slow Food movement.^{xxxi,193}

xxx Co-op Partners Warehouse has been in business for 23 years, supplying over 400 customers in 7 states in the Upper Midwest of the United States, distributing to co-ops, natural grocers, restaurants, coffee shops, cafes, educational institutions, and buying clubs.

xxxi An example is the Nordic Cooperation In 2004 Nordic chefs launched a manifesto that championed local, seasonal and traditional Nordic food. Although initiated by elite chefs, the manifesto sparked a wave of regional and international chef-influenced innovation around local food, for example the Movimiento de Integración Gastronómica Alimentario Boliviano (MIGA).

Significant scope has also been identified in North America for bringing supply chains closer to home in the social economy sector and community-based organizations, e.g. community kitchens and food banks, with strong potential for alignment of values.¹⁹⁴

2.4 STATE FOOD PURCHASING AND MARKETING INITIATIVES

STATE-MANAGED MARKETS. Under the impetus of global market liberalization and free trade policies, state marketing boards and market management policies – previously a fixture of food systems in many parts of the world – have largely been dismantled. Nonetheless, in some contexts they remain active and continue to offer an avenue for small-scale producers and family farmers to sell at guaranteed prices. For instance, in India, Mandi markets are formal, state-supported markets where farmers sell to registered agents, established to expand local market access for producers. Combined with the government-set Minimum Support Price for some products, they aim to support farmer livelihoods through good prices and infrastructure for smallholders. An additional example is Canada’s supply management system for dairy, broiler chickens, laying hens, turkeys, and hatching eggs, where volume is regulated through managed production and stable pricing is maintained for producers and consumers.^{xxxii} While challenges remain in these markets, in both India and Canada farmers have mobilized to preserve the benefits they deliver and protect them against further liberalization.

PUBLIC DISTRIBUTION SYSTEMS. While operating primarily as a food security policy, public food distribution systems are another market mechanism with significant potential to support producer livelihoods, relocalize food provisioning, and provide alternatives to conventional corporate value chains. India’s Public Distribution System – the largest in the world, with over 800 million people participating – is operated by the Food Corporation of India and individual states, and is heavily focused on rice and wheat, with uneven sourcing around the country. Nonetheless, the program is taking steps

to decentralize production and diversify foods.¹⁹⁵ For instance, the government of the state of Odisha has innovated a new approach, procuring nutrient-rich millet for a growing number of tribal district Public Distribution Systems from a tribal cooperative, supported by decentralized millet processing units, which also facilitate local markets in associated millet products.¹⁹⁶

“*State marketing boards continue to offer an avenue for small-scale producers & family farmers to sell at guaranteed prices*”

PUBLIC PROCUREMENT. Institutional public procurement represents a marketing channel of unparalleled potential for supporting and anchoring territorial markets. Throughout the world, institutional public procurement – encompassing schools, universities, government canteens and catering, prisons, hospitals, and the military – is generally designed for large companies, and based on convenience, volume, and cost, rather than in support of food system resilience. Smaller scale food providers face operational (e.g., food safety guidelines) and organizational (e.g., minimum order size) barriers to entry. However, targeted public procurement schemes (e.g., school feeding programs that source from local smallholders) represent a major territorial market opportunity that is already being leveraged by a number of governments and local authorities, becoming crucial markets for producers and yielding a number of positive impacts.^{197,198} For instance, the Good Food Purchasing Program in the US, founded on five principles (local economies, environmental sustainability, valued workforce, animal welfare, and nutrition), has impacted USD 1.1 billion in food procurement in 71 cities, school districts, and institutions.¹⁹⁹

xxxii This protective measure was threatened, if largely unsuccessfully, by the United States when the NAFTA trade deal was re-negotiated as USMCA. See NFU. *Supply Management*. Accessed May 23, 2024.

In some cases such as Brazil, targeted territorial public procurement approaches are being combined with broader agriculture and food policy goals, including agroecological transition programmes (see Box 8).

Finally, it is worth noting that some large-scale state interventions in support of producers, or types of production, have a positive effect on territorial

marketing. For example, through the Andhra Pradesh Community-managed Natural Farming (APCNF) programme in India, marketing training is provided and connections to local market channels are being facilitated, including a procurement contract with Hindu temples (alongside online, door-to-door delivery, retail shops and stalls, and physical markets).^{200,201,202}

BOX 8.

PUBLIC PROCUREMENT IN BRAZIL: A CENTRE-POINT OF AMBITIOUS FOOD SECURITY AND NUTRITION STRATEGIES

In some countries, public procurement is part of integrated national policy, as a mainstay of rural development, inclusion, health, agricultural, social development, and food and nutrition security strategies. Brazil's strategies to eradicate hunger and guarantee food security and nutrition include two major public procurement programmes: the Public Food Purchase Programme and the National School Feeding programme. The school feeding program has more than 40 million student participants, and its procurement policies include a stipulation for purchasing a minimum of 30% from small farmers and rural entrepreneurs, with a priority on marginalized producers. Over USD 600 million per year is spent on local procurement through these programs – holding among many goals to 'promote and enhance biodiversity, organic and agroecological food production' (including through a 30% price premium for agroecological foods)²⁰³, and to 'stimulate the development of cooperatives and associations'. The two programs are designed specifically to support small farmers and entrepreneurs to access formal markets, and include insurance, loans, capacity building and extension services – and simplified procurement models to suit small suppliers. Most recently, it has been mandated that at least 30% of the public food procurement budget (e.g., for public hospitals, schools and the armed forces) must go to family farms.

Also of note is the Public Infrastructure for Food and Nutrition Security programme which funds municipalities to build, equip and manage popular restaurants providing free or subsidised meals, community kitchens, and public food banks. These facilities are designed to operate using predominantly local foods including traditional Brazilian foods, with fruit and vegetables sourced from smallholders through the Public Food Purchase Program. In 2020 there were 104 popular restaurants, 189 Community Kitchens and 87 public food banks in operation.²⁰⁴

Spillover effects for small-scale producers include increased demand for their products in marketplaces, as well as the creation of new farmers' markets selling products from programme-affiliated farmers, supported by word-of-mouth testimonials from programme participants.²⁰⁵

2.5 URBAN FOOD PRODUCTION AND EXCHANGE SYSTEMS

Although they cannot be considered as *marketing channels* per se, and do not fall into any of the categories above, urban and peri-urban agriculture and related exchange systems are key pieces of the puzzle in terms of understanding food production and provisioning beyond the corporate chain. The role of urban and peri-urban agriculture in food security is particularly important in a context of rising urbanization: over half the global population currently resides in urban areas, and this is expected to rise to 68% by 2050.^{xxxiii} In this context, urban and peri-urban agriculture^{xxxiv} is increasingly recognized as a core strategy for building the resilience of a city's food supply, through both marketing and community/household consumption. Although data is patchy, the FAO estimates that well over one billion urban residents are engaged in urban and peri-urban agriculture, including 50% of Latin American and 40% of African city dwellers²⁰⁶ – despite the cost of accessing land due to, among other obstacles, real estate, commercial and industrial development, zoning, and land speculation.

Although some urban and peri-urban food production is for subsistence purposes, much of it is marketed through public markets and other channels. A study of 11 African countries shows that home-grown food (and food gifted to households) represents less than 10% of total food consumption in urban contexts, and about one third in peri-urban areas.²⁰⁷ Remaining surpluses from urban food production reach additional populations through a range of channels. Direct sales has been identified as the main marketing form for small-scale, 'home gardening' urban and peri-urban surplus. For example, in one neighbourhood of Managua, Nicaragua, 17% of households sell produce to their neighbours directly or at local markets. Farmers operating at a larger scale, through community or market gardens, tend to sell through intermediaries or to institutions. For example, in West Africa, urban and peri-urban food producers sell to traders who come to their farmgate, as well as through local markets. Community Supported Agriculture is highly correlated with farms located in or close to cities. Urban farms are also combining growing and retail to attract urban consumers, and agritourism at peri-urban farms is another way to add value.²⁰⁸ Further, by enabling city dwellers to access diverse and Indigenous crops, urban and peri-urban agriculture is making important contributions to food security and resilience (see Section 3).

“ 50% of Latin American & 40% of African city dwellers are involved in urban & peri-urban agriculture ”

xxxiii The impacts of climate change on this projection may be underestimated, as billions living in coastline and floodplain cities move to escape, or are moved by government policy. See C40 Cities. (2018). *Sea Level Rise and Coastal Flooding*.

xxxiv Data is lacking regarding what percentage of this production is within or outside of corporate value chains.



HOW TERRITORIAL MARKETS BUILD FOOD SECURITY AND RESILIENCE

In a context where territorial markets and food systems are systematically undervalued,^{209,210,211} it remains crucial to understand and communicate their contributions to food sovereignty, food security, and resilience.

Getting a full picture of territorial markets and food systems is highly complex. Data on the various market forms and marketing channels described above is uneven, and difficult to aggregate. The initiatives in question are operating on small scales and/or with conscious separation from the more data-driven conventional markets and supply chains. Even a comprehensive overview of the market forms and channels listed above would not provide a full picture of food provisioning outside of corporate chains, which comprises a whole range of additional non-market-based state, community, household, and individual-level approaches.

Notwithstanding these challenges, a wealth of insights can be found on these diverse, vibrant markets, and we bring them together below to illustrate key ways in which territorial markets contribute to resilience.

3.1 CONTRIBUTIONS TO FOOD SECURITY

Equity, access, diversity, biodiversity, weathering and adapting to shocks

Territorial markets make critical contributions to food security, in particular, through their primordial contributions to *equity* (including affordability and producer livelihoods) and *access to food* – and through their *adaptability* in the face of shocks (see Section 3.4).

While terminologies, parameters, and data points are often contested, the significance of territorial food systems to global food security is beyond question. Civil society assessments have estimated that **over 70% of the world's population is fed by small-scale food producers and workers in 'peasant food webs'**, despite them accounting for less than one third of agricultural land and resources.^{xxxv,212,213} In some regional contexts the figure may be higher still, with an FAO study noting that small-scale and family farmers produce 80% of the food supply in sub-Saharan Africa and Asia.²¹⁴ Although cross-border food trade does not automatically equate to corporate control of the value chain, it is significant that only a minority of the food consumed globally actually crosses international borders, despite increasing volumes of food commodity trade²¹⁵ and their heavy demands on land and resources.^{xxxvi} Some 80% of urban food demand is in fact supplied within a 500 km radius.^{xxxvii,216} And although a number of countries remain highly dependent on staple food imports,^{xxxviii, xxxix} global chains account for roughly 15-20% of total food consumption in Asia and sub-Saharan Africa,²¹⁷ with less than one quarter of the calories produced in the world crossing borders.²¹⁸ Even these figures overstate the contribution of global value chains to nutrition, given the low nutrient adequacy associated with food import dependency.^{xl}

Territorial markets play a crucial role in making food accessible and affordable to low-income populations, thereby making critical contributions to food security and resilience (notably the *equity* and

access to food dimensions). Like in all markets, some territorial marketing channels may price out low-income groups. However, there is extensive evidence demonstrating that territorial markets – and especially public/traditional markets in the Global South – are the most accessible of all food marketing options. AFSA's pan-African study reports that public market food pricing was affordable and negotiable, and cheaper than at supermarkets.²¹⁹ This is supported by further evidence from Africa noting the higher price of fruit and vegetables in supermarkets (up to 125% higher for the same foods),^{220,221} and evidence from lower-income neighbourhood markets in Asia and Latin America.²²² Research in Canada found that for 9 out of 10 foods, recent price inflation was higher in grocery stores than in farmers' markets.²²³

“Public market food pricing is often affordable and negotiable, and cheaper than at supermarkets”

Further, some territorial markets are working to enhance affordability through vouchers, nutrition coupons, healthy food prescriptions, and pricing schemes to further support equity and guarantee

xxxv The peasant food webs in question include food produced by farmers and home gardeners, fished and harvested in rivers and oceans, gathered in forests and along the edges of fields, grown on rooftops and reclaimed lots, hunted on savannahs, raised in grasslands, foraged in jungles and on mountains and more. The 70% figure is contested. See ETC Group. (2022). *Small-scale peasants still feed the world: explaining competing claims of 70% vs 30% and why it matters*.

xxxvi Study shows that by 2017 almost 100 million hectares of agricultural land had been bought by foreign investors and wealthy countries since the early 2000s. See Marselis, S.M., et al. (2017). *Agricultural land displacement and undernourishment*. Journal of Cleaner Production, vol.161, pp.619-628.

xxxvii Comparative data on the contributions of various kinds of agriculture is lacking.

xxxviii E.g., In Eastern Africa, as much as a third of average cereal consumption is from wheat/wheat products, 84% of which is imported, largely from Ukraine and Russia. See IPES-Food. (2022). *Another perfect storm? How the failure to reform food systems has allowed the war in Ukraine to spark a third global food price crisis in 15 years, and what can be done to prevent the next one*.

xxxix E.g., For sub-Saharan Africa, the average import share is only between 10 and 13%, but 60% of rice and most wheat is imported (although by tonnage they represent only 2.5% of all food consumption). See Liverpool-Tasie, L. S. O., Reardon, T., & Belton, B. (2021). *“Essential non-essentials”: COVID-19 policy missteps in Nigeria rooted in persistent myths about African food supply chains*. Applied Economic Perspectives and Policy, 43(1), 205-224.

xl Due to a reliance on imported cereals rather than more micro-nutrient rich foods. See Geyik, O., Hadjikakou, M., Karapinar, B., & Bryan, B. A. (2021). *Does global food trade close the dietary nutrient gap for the world's poorest nations?*. Global Food Security, 28, 100490.

access (supported by governments, charities, and consumer solidarity initiatives).^{xli} For example, the public markets in Rio Grande do Sul, Brazil, use a fixed price system set 20% below the prices of the same items at nearby grocery stores.²²⁴ Other markets forgo pricing and work through different forms of exchange. For instance, in Peru's Chalayplasa barter markets, the amounts traded can be informed by the participants' relative prosperity (see Section 3.2 for more on these markets).²²⁵ In France, a mobile "social grocery" shop was created by local organic farmers to democratize access to their produce. This initiative is part of a wider network of farmers and low-income groups partnering to meet the challenge of accessing, appreciating, and cooking local produce, without increasing household food budgets.^{226,227} In Brazil, the Movimento dos Trabalhadores Sem Teto (MTST, Homeless Workers Movement) responded to growing hunger through a network of Solidarity Kitchens, which have since been supported by the government, including through the public procurement program described in Box 8 above. Both MTST and the government frame this support within the realization of the right to food, rather than on the basis of charity.^{228,229} These initiatives demonstrate how, within territorial food systems and markets, democratizing access to food may include subsidized food for the poorest, while avoiding the corporate approach of cheap food at any cost to the wider food system (see Section 4).

In addition to being more affordable, **territorial markets tend to be better suited to the broader needs and preferences of low-income and marginalized populations, further enhancing equity and access.** These markets are accessible by virtue of allowing for the purchase of small and flexible quantities of food, price bargaining, informal credit arrangements between sellers and buyers, and being located in or near low-income neighbourhoods.^{230,231} Public markets are especially critical in urban settings in low- and middle-income countries, in terms of enabling access to reasonably priced fresh food on foot or by public transit, throughout neighbourhoods.

In Dhaka, Bangladesh, for example, over 400 markets feed more than 25 million people every day, and the FAO estimates that 95% of the city's urban poor purchase most of their food from these fresh food markets,^{232,233} illustrating how territorial markets meet the needs of lower-income populations at scale.

“Public markets are especially critical in getting food to low-income populations in urban areas”

Further, **small and informal food retail plays a key role in light of the specificities – often overlooked^{xlii} – of urban food environments in the Global South.**

In Africa, poor urban households buy most of their food from the street or other types of informal markets, and these sources have been shown to be vital in delivering a measure of food security to the most vulnerable populations, with similar findings for the urban poor in Asia, Latin America and the Caribbean.^{234,235} For example, slum dwellers in Nairobi and Kampala buy most of their food from traditional retail outlets such as local markets, small shops, and street kiosks, with supermarkets accounting for only 0.4-3% of all food expenditure.²³⁶ They are also essential for people who are unbanked. For instance, in Zimbabwe, the majority of consumers have no bank cards, and territorial markets and small shops enable cash purchases rather than the use of Point of Sale machines largely used in supermarkets.²³⁷ Further research from South Africa demonstrates that the more food insecure and low-income households are, the more likely they are to depend on the informal food sector.²³⁸

xli E.g., the Maine Farmshare for seniors programs; the nutrition coupons scheme in Canadian farmers' markets; the Supplemental Nutrition Assistance Program (SNAP) at farmers' markets in the US, and social prescribing of fruit and vegetables in the UK, Canada and the United States. See IPES-Food. (2023, March 1). Territorial Markets and Food System Transformation: Advancing Agroecology, Food Sovereignty, and Human Rights. *US, Canada and Indigenous Territories Dialogue*. ; A 2023 World Map of Social Prescribing includes case studies from 24 countries, although not all of them include food prescriptions. Khan, H., Giurca, B.C. et al. (2023). *Social Prescribing Around the World A World Map of Global Developments in Social Prescribing Across Different Health System Contexts*. National Academy for Social Prescribing, WHO & Global Social Prescribing Alliance.

xlii The food environments in cities specifically are highly variable, and categories and metrics developed in high-income countries that can be grounded in approaches such as static built environments are unsuitable for capturing the importance of the dynamic informal and semi-formal markets and street vendors that trade in cities across the Global South.

When considering food security in its multiple dimensions, the contribution of territorial markets is even more apparent. Protection from volatility in global market pricing is especially important for low-income urban consumers, for whom unexpected increases in food costs often result in poorer nutrition, if not hunger²³⁹ – and territorial markets have clear benefits in this regard. They are also associated with stronger nutrient protection for lower income groups, through access to fresh and diverse foods rich in micronutrients.²⁴⁰ Further, the *diversity* inherent in territorial markets, as outlined above, improves access to a variety of healthy foods, giving people real options at prices affordable to them.²⁴¹

Further, territorial initiatives are key to conserving the *biodiversity* that is integral to sustain food production and deliver food and nutrition security. For example, in Cusco, Peru, women in the Parque de la Papa have their own market, where they share regional products, and exchange and conserve about 2,000 varieties of potato seeds. In this process, dietary diversity and food cultures are supported, farmers are recovering ancestral knowledge, and ancestral potato seeds are conserved and reproduced.²⁴² (For more on territorial markets and biodiversity, see Section 3.3).

3.2 RESILIENT LIVELIHOODS, COMMUNITIES, AND CULTURES

Autonomy, agency, diversity, adequacy of resourcing, equity and access

Livelihood benefits for producers have been recognized as key characteristics of territorial markets, representing a major contribution to *equity* and thus to resilience. For instance, the CSIPM and the AFSA characterise public markets (which in these contexts they are calling ‘territorial markets’), as economically beneficial: they “provide income generating and livelihood improvement opportunities”,²⁴³ and are the “most remunerative for smallholders”.²⁴⁴ These benefits are generally achieved through increased producer *agency* and price control (see below on *autonomy*) and circumventing exploitative intermediaries.

“ **Thai producers are able to derive 60-80% of their income from green farmers’ markets** ”

Data suggests that these types of livelihood benefits are widespread across a range of territorial marketing channels. For example, IPES-Food Dialogue participants confirmed that producers selling in Thai ‘green’ farmers’ markets were able to derive some 60-80% of their income from them, with higher margins than when selling to big merchants. Meanwhile, a systematic review of the economic sustainability benefits of CSA farms found high economic viability, although comparative data is limited.²⁴⁵ With more than 90% of food hubs in the US breaking even or turning a profit in 2020,²⁴⁶ this marketing channel also appears to be an important and sustained income source for food producers. However, particularly strong financial health in that year may have been related to pandemic-related supports;²⁴⁷ 2021 US data shows that food hubs have struggled to offer competitive wages and benefits, with workers earning below average hourly wages.²⁴⁸

Buyer collectives and traders are also facilitating aggregation in a way that brings income benefits. For instance, through the *Chao Zhuang Shi Chang* platform in China, self-organized consumer groups in cities such as Beijing and Baoding use the internet, WeiXin (WeChat), and electronic payments to order monthly produce deliveries directly from groups of cooperating peasants in villages, allowing small-scale producers to secure good prices without intermediaries, and to benefit from advance payments.²⁴⁹ In African countries like Malawi, Tanzania, Uganda, Rwanda, Zambia, and Zimbabwe, traders pool together money and mobilize transport to aggregate and buy commodities from remote farming communities.²⁵⁰

State-led purchasing can also bring major livelihood benefits for farmers. Procurement programmes that are intentional about meeting broader social, economic, and environmental goals – including decent pricing – can help develop both stable and sometimes large markets for a diversity of small-scale food producers and processors.

These kinds of targeted procurement schemes have been further recognized as delivering local, diverse, nutritious, and culturally-appropriate food to institutions, as well as fostering economic inclusion, and advancing awareness and political consciousness regarding food production practices and choices.²⁵¹ For example, connecting formal procurement systems with grassroots food-producing communities in Africa has fostered economic justice, by encouraging farming cooperatives to formalize and register as suppliers – in contrast to more standard arrangements where middlemen with registered companies are the official suppliers.²⁵² State-governed ‘mandi’ markets in India can also bring bulk government purchasing to bear to support farmer livelihoods through good prices (including through minimum support prices) and infrastructure for smallholders, although their impact varies considerably among different states and products.^{xliii,253,254}

In territorial markets, food producers, transporters, processors, distributors, and vendors generally have significantly more agency and autonomy than when participating in corporate value chains. These attributes are key to delivering the livelihood benefits described above, as well as making crucial contributions towards food sovereignty. From planting decisions to harvesting timelines to price-setting, participants in territorial systems generally have power to act on their decisions, within contextual constraints. For example, in Zimbabwe, farmers, transporters, traders, and food vendors have developed their own ‘ring-fenced’ marketing models. Transporters take products to market without demanding upfront payment from farmers and deliver the products to a trader, who sells the products and pays back the transporter and then the farmer along the same route in reverse – with each actor taking his/her share or margin.²⁵⁵

Autonomy is one of the many positive outcomes associated with well-targeted, territorially-focused public procurement schemes. In Brazil’s school feeding programme and associated zero hunger policies, farmers have reported resilience-related benefits, including: autonomy from commodity

markets controlled by agribusiness, supporting food security and food sovereignty, reducing reliance on off-farm income, and enjoying fixed prices and reliable contracts.²⁵⁶ More broadly, food producers have established various practices and approaches – including agroecology – that facilitate autonomy from potentially high-impact forces over which they have no control, such as volatile input and commodity markets. Cooperation and collectivity (see below) are ways to build power and autonomy in the marketplace, and producers, intermediaries, and buyers are organizing accordingly.^{257,258}

The diversity of activities and marketing channels within territorial markets helps to mitigate risks and bolster livelihoods and communities. While corporate value chains tend to bind producers into singular arrangements, *diversity* is a hallmark of territorial markets, with a wide range of actors, types of food, provisioning mechanisms, marketing approaches, and governance initiatives involved. As seen above, small-scale producers use a range of direct sales strategies simultaneously, combining a mix of digital and in-person marketing approaches to maximize ways to reach buyers, thereby spreading out risk and strengthening livelihoods. For example, in Burkina Faso, Lôgôba Agriculture sells fresh organic produce and food products from mainly female producers with a hybrid model: a physical store, a web platform, and a sales app.²⁵⁹ In Lome, Togo, BIOLAMESSIN is both a weekly organic food market situated within the Dekawolossime market, and a digital platform. An initiative of the agroecology enterprise Experta Toga, it is a way for organic farmers in the countryside to connect with urban populations. BIOLAMESSIN’s success has been replicated in two other towns, and training for producers introduced.²⁶⁰

The diversity of marketing channels – including collective and cooperative approaches – has been demonstrated to be strong in agroecological initiatives. An FAO meta-review of 12 country case studies identified that only 15% of agroecological production was for barter/trade and self-provisioning, with the rest sold through 20 different market channels.^{xliv}

xliii Although highly diverse and contested in many dimensions, the farmers’ movement in India in 2020-21 struggled to save the minimum support pricing of the Mandi system against three farm laws which would have eventually dismantled it.

xliv The most important markets were direct sales and on-farm sales, farmers’ markets and eco fairs, and restaurants and hotels. See Loconto, A., Jimenez, A. & Vandecandelaere, E. (2018). *Constructing markets for agroecology – An analysis of diverse options for marketing products from agroecology*. FAO & INRA.

Some actors in territorial food systems are also able to diversify and strengthen livelihoods by combining monetary and non-monetary exchanges, sometimes within the same public market settings. For example, Vinculación y Desarrollo Agroecológico en Café, a Mexican peasant coffee producers association with a strong Indigenous identity and commitment to seed guardianship, agroecology, and food sovereignty, participates in markets encompassing both monetized and barter approaches.^{261,262}

“ Territorial market initiatives are often women-led, allowing for greater empowerment and autonomy in decision-making ”

The *equity* component of food system resilience also concerns gender, and there is ample evidence to suggest that **the participation of women is a key and distinctive part of territorial markets** – although income gaps and other forms of inequality also manifest in these markets. For example, a 3-country FAO study records a significant number – and often majority of – female retailers participating in local/regional public markets.²⁶³ AFSA's pan-African study confirms that women's participation in public markets is substantial but still segmented, with women predominant in trading smaller amounts of highly perishable foods for household consumption, while men lead in trading larger quantities of less perishable products.²⁶⁴ Participants in the IPES-Food Latin America dialogue also underlined that a key feature of their territorial market initiatives was that they were often led by women, and delivered a wide range of benefits to them, including greater empowerment and *autonomy* in decision-making, and the exercising of rights grounded in dialogue and encounters with other women in market settings.^{xlv}

Women's participation – as well as youth involvement – appears to be particularly strong in informal markets and street vending, as a result of low barriers to entry. A Latin American study showed that participation in informal markets gives women more control over household income,²⁶⁵ and another study reiterated these benefits – while highlighting that these markets tend to yield low returns in unregulated and precarious conditions.²⁶⁶ Indeed, as the various sources indicate, entrenched inequalities continue to undermine the benefits for women, even as they participate extensively in territorial markets (see discussion of these structural barriers below in Section 4).

Territorial food systems can also enhance equity and access, and bolster food system resilience, by increasing market share for marginalized communities. For instance, since 1967, the Federation of Southern Cooperatives in the southern United States has organized Black farmers, creating and supporting more than 200 cooperatives, facilitating more than USD 80 million in sales, and assisting more than 5,000 Black farmers in saving more than 175,000 acres of Black-owned land. The goal is to create local food economies that sustain communities.²⁶⁷ Territorial markets also support equity for Indigenous peoples and communities, as noted in examples below.

3.3 RESILIENT ENVIRONMENTS

Ecological integrity, biodiversity

Boosting biodiversity, enhancing climate-resilience, and maintaining and restoring the health of ecosystems is supported by territorial markets in numerous ways. Enhancing and protecting biodiversity is a central pillar of small-scale food production and Indigenous foodways. Urban agriculture also has documented benefits in terms of maintaining agro-biodiversity.²⁶⁸

xlv Reported benefits included: helping to reduce the gender equality gap (as, when women produce, market, process, and exchange food, they have access to land, water, and territory, encouraging a more equitable distribution of tasks); empowering women (as participation in these markets has a multiplier effect compared to conventional markets due to skill development such as price setting and negotiation skills); and - for women in the Continental Network of Indigenous Women - has led to greater political awareness, autonomy in decision-making, and the exercising of rights grounded in dialogue and encounters with other women in market settings. See IPES-Food. (2023, March 14). Mercados Territoriales y Transformación de los Sistemas Alimentarios: Avances en Agroecología, Soberanía Alimentaria y Derechos Humanos. *Diálogo Latinoamericano*.

For example, urban gardeners in Quito, Ecuador, grow on average 43 different horticultural species, including heirloom varieties.²⁶⁹ Migrants from other regions or countries maintain their traditional food cultures and nurture community through urban and peri-urban agriculture, and contribute more agrobiodiversity to city foodscapes. For instance, migrant urban farmers cultivate at least four Cape Verdean bean varieties in Lisbon, Portugal.²⁷⁰

“Enhancing and protecting biodiversity is a central pillar of small-scale food production and Indigenous foodways”

As described above and recognized through IPES-Food’s regional dialogues, territorial markets are closely associated with agroecology, and in many cases help to provide market outlets for farmers using natural fertilizers and pesticides that work with nature, rather than the fossil-fuel based synthetic inputs associated with corporate value chains. Local market opportunities can also encourage farmers to switch to more environmentally-friendly food production. For example, in Zimbabwe, strong sweet potato pricing in urban public markets swayed farmers away from chemically-intensive cotton farming. As a consequence, soil and water in the farming areas have become healthier, and bees are thriving and pollinating local crops, enabling the return of Indigenous pumpkin production.²⁷¹

There are also widespread environmental benefits associated with the diversity of foods available at territorial markets. FAO mapping of public markets in seven countries noted a range from 47 to over 100 kinds of unprocessed foods available per country across the surveyed markets.²⁷² Seasonal, cultural, ceremonial, and medicinal foods – and other highly localized fruits, vegetables, herbs, meat, fish, and dairy – are context-specific and often available only in traditional/public markets. This provides market outlets for products that are generally harvested sustainably, strengthening incentives for biodiversity protection/restoration. For example, in the Peruvian Andes, the

Chalayplasa barter markets are Indigenous spaces, predominantly operated by women. Traditional, highly diverse varieties – mainly fruits from the valleys, and grains and tubers from higher altitudes – are exchanged, helping to conserve agrobiodiversity.²⁷³

Territorial markets are also the main source for diverse Indigenous seeds, which are particularly essential in the face of droughts. Farmers who have lost their locally-adapted seed stock rely on seed keepers who sell in local markets, rather than corporate seed companies who tend to prioritize hybrids. This provides not only well-adapted seeds for local use, but ensures that rare and unique varieties do not go extinct.

Further, evidence from East, West, and Southern Africa has underlined that **averting food loss and waste is another major environmental contribution of territorial markets.**²⁷⁴ Corporate value chain processing, and supermarket retailing, often prefer first grade commodities (e.g., grade A and B tomatoes), and territorial markets provide markets for grades C and lower. In addition, shorter food chains are a central mode of organization across various territorial market forms, with demonstrated environmental, social, and economic sustainability benefits, including the **reduction of food miles.**²⁷⁵

Public procurement can be a particularly powerful driver of environmental benefits: a meta review of more than 100 articles on public procurement and sustainability concludes that sourcing ‘local’ and ‘organic’ food delivers benefits in terms of three aspects of sustainability: economic, environmental, and social.²⁷⁶

Yet, in part due to the many pressures facing territorial market actors (see Section 4 for details), practices that undermine ecological integrity can also be found.

3.4 WEATHERING AND ADAPTING TO SHOCKS

Flexibility/redundancy, managing connectivity, preparedness

Territorial markets display a high ability to prevent, adapt to, and mitigate crises – in particular thanks to their flexibility and capacity to adapt and innovate. These attributes were repeatedly illustrated during the COVID-19 pandemic.

For many small-scale farmers, fishers, workers, and vendors, particularly in the Global South, pandemic impacts – including lockdowns, supply chains disruptions, market closures,^{xlvi} and the suppression of street vending – meant further stresses to already marginal livelihoods.^{xlvii,277} Yet, despite these challenges, various territorial marketing channels proved robust and provided a lifeline through the pandemic, showing generally high levels of resilience,^{278,279,280,281,282,283,284} and allowing many actors to sustain their livelihoods and continue supplying food to their communities. For example, in Lesotho, when borders closed, a group of agricultural graduates created Lecholi, a company to source, process and distribute sustainably produced local meat from smallholders for the domestic market, previously dominated by South African imports. In Kenya, the Fresh Produce Consortium worked with the government to issue nighttime travel passes for vans transporting produce and established new ad hoc sales points in residential areas. In Mutare, Zimbabwe, the central market was closed, and a network of neighbourhood markets established, which proved to be more convenient for both sellers and buyers.²⁸⁵

“ **Many territorial marketing channels proved robust & provided a lifeline through the COVID-19 pandemic** ”

This **flexibility and ability to rapidly innovate also extended to market governance** (e.g., in-situ community certification approaches), marketing modalities (e.g., moving between various marketing platforms – both physical and virtual), adaptation of

payment systems (e.g., flexible purchasing options for low-income buyers), and relationship-building. In Brazil, new territorial partnerships and networks were forged based on trust and solidarity between producers and consumers, including by leveraging new and old digital technologies (e.g., Whatsapp group chats). This not only kept small-scale producers afloat by ensuring access to markets, but it allowed vulnerable groups to receive food aid during the pandemic. In a national survey that mapped 157 emergency food supply initiatives, 45% declared they supplied food produced in the same locality, with over 85% being at least partly agroecological.²⁸⁶

Urban and peri-urban food production proved particularly valuable in supporting urban food security through the pandemic, sustaining access to fresh foods for urban residents at reasonable prices.²⁸⁷ Previous studies have also underlined the importance of grassroots urban food production in softening the impact of global food crises, including through social and psychological resilience.²⁸⁸

Critical pandemic responses also emerged when state authorities drew on pre-existing territorial market infrastructures, with local actors proving able to scale up and meet challenges. For example, in India – where a sudden lockdown sparked a worker exodus from big cities and widespread risks of food insecurity – the Kerala government set up 1,000 ‘Janakeeya Hotels’ run by the all-women network Kudumbashree, providing an average of 70,000 subsidized meals every day.²⁸⁹ Produce came from the Kudumbashree local production program, which also sells directly to consumers in monthly markets.²⁹⁰

xlvi For instance, in Colombia, specifically in the Amazon region, the MUTESA (Mujeres, Tejer y Saberes) initiative, led by women who were forcibly displaced due to armed conflict, created a market for Amazonian products, as well as a restaurant. This process was paralyzed during the pandemic. See IPES-Food. (2023, March 14). Mercados Territoriales y Transformación de los Sistemas Alimentarios: Avances en Agroecología, Soberanía Alimentaria y Derechos Humanos. *Diálogo Latinoamericano*.

xlvii Precipitated closures at the start of the pandemic were prompted in part by the association of food markets with the disease, since the earliest identified cluster of cases of COVID-19 was at a wet market (public market selling fresh produce, fish, meat, and sometimes wild species and on-site slaughter,) in Wuhan, China. While there are biosecurity and infrastructure challenges to be met, the very substantial biosecurity failures and pandemic risks in the corporate food chain (such as hyper-transmissible virulent zoonotic pathogens in overcrowded industrial feedlots) tend to be overlooked. See Guo, Y., Ryan, U., Feng, Y., & Xiao, L. (2022). *Association of common zoonotic pathogens with concentrated animal feeding operations*. *Frontiers in Microbiology*, 12, 810142.

BOX 9.

PARTICIPATORY GUARANTEE SYSTEMS: COLLECTIVE TRUST-BUILDING MECHANISMS OUTSIDE THE CORPORATE CHAIN

A notable innovation in support of territorial markets has been the development of trust-based community guarantee/assurance systems that provide zero/low-cost alternatives to often costly and time-consuming third-party certification schemes. Local food system actors (e.g. farmers, fishers, food buyers, retail and restaurant buyers) collaborate to guarantee aspects of production, such as whether they follow the principles of agroecology.^{xlviii,291,292}

Participatory Guarantee Systems (PGS) are the most widely used form of community assurance. They operate in more than 75 countries, with one global survey recording 332 schemes working with almost 1.5 million producers.^{293,294} Some schemes enjoy government recognition. Examples include:

- In 2007, **Brazil** amended its regulation of organic produce to officially recognise PGS certification.²⁹⁵
- In **Mali**, a PGS system for vegetable seeds developed by farmer cooperatives from the Safo Community working with government officials and the NGO SeedChange Canada is helping to improve national seed laws.^{xlix,296}
- **India** is a world leader in PGS approaches. By 2019, in the context of widespread government support, over 300,000 producers were involved in community certification.²⁹⁷ The process is regulated by an independent PGS Organic Council made up of various NGOs that aggregate small and marginalized organic farmers across all Indian states. The Council provides general certification guidelines that each group of farmers adapts to their local context and to specific products.²⁹⁸
- In **Yoro, Honduras**, seed committees use participatory research to ensure the production of diverse, locally-adapted varieties.^{299,300} They seek to strengthen farmers' rights and decision-making in the seed value chain through a local seed certification pilot, and policy advocacy through national farmers' associations.
- In **Mexico**, a Participative Organic Certification Committee was created,ⁱ involving agroecological producers, technicians and consumers, who through networks such as the Conscious Consumption Cooperative (Milpa),ⁱⁱ provide support to agroecological producers to become certified and access new, remunerative markets.

Other, less formal, community certification mechanisms are also in use. In Karnataka's 'Namdu' ("Ours" in the Kannada language) markets, people have the opportunity to assess how the produce is grown by visiting the farms. In Thailand's Green Farmers Markets, farmers set their production standards and answer questions about how the food is produced, promoting trust between producers and consumers. This form of certification is trusted more than organic supermarket produce because of personal connection.³⁰¹

xlviii However, community certification requires a level of capacity that not all communities may have, and, in the case of non-standard products, it may be beneficial to additionally consider the use of local norms (as opposed to set standards).

xlix Mali's 2010 Seed Law states all seeds for sale must be certified, which puts farmers at a disadvantage *vis-à-vis* enterprises given the high costs of certification. See Totin, E. (2016, July 4). *Seed certification and marketing governance in Mali: Do farmers actually benefit?*. ASSAR.

i Through the Law of Organic Products, that recognizes Participative Organic Certification. See: IPES-Food. (2023, March 14). Mercados Territoriales y Transformación de los Sistemas Alimentarios: Avances en Agroecología, Soberanía Alimentaria y Derechos Humanos. *Diálogo Latinoamericano*, and also Latinno. *Participatory Organic Certification*.

ii Milpa is a consumers and producers collective based in Western Mexico, and linked to other collectives across the country. They seek to guarantee access to food and other products at a fair price mediated by a "social currency". See Milpa's [website](#) (in Spanish).







As emphasized in food system resilience discourse, connectivity can have both positive and negative impacts – thus the emphasis on *managing connectivity*. In Section 1, for instance, we saw examples of the kinds of connectivity that undermines food system resilience (e.g., volatile commodity prices impacting local farmers). **Territorial markets are also built on connectivity, yet this kind, premised on collaboration and relationships, helps to weather shocks, generating multiple spin-off benefits for food security and resilience.** For example, direct sales enable connections and relationships between food producers and buyers. Similarly, collective and cooperative approaches are grounded in intentional and horizontal connectivity. Examples above from Argentina and Brazil show how scale can be built through networked horizontal connections, while the cooperative model in Europe and the US is also building substantial alternative retail ecosystems.

In India, women’s groups have been farming collectively – pooling labour, land and capital, and collectively setting prices – becoming increasingly visible and experienced in market settings.³⁰²

Some territorial markets have explicit identities that situate them in opposition to corporate value chains and/or highlight intentional social, environmental, and economic multifunctionalities.³⁰³ They seek to build connections, trust, and mutual understanding between food providers and purchasers – what is sometimes referred to as ‘social capital’ – as a counterpoint to the alienation and the lack of accountability found in industrial food systems.^{304,305,306} **Across the literature on territorial markets, relationships, connectivity, and collaboration emerge as key characteristics, building a strong basis for resilient food systems and delivering a number of other benefits** (see Box 10).

FIGURE 3.

IMPROVING FOOD SYSTEMS OUTCOMES BY BRINGING FOOD CLOSER TO HOME

| | CORPORATE SUPPLY CHAINS... | TERRITORIAL MARKETS... |
|---|--|---|
|  | FOOD SECURITY damage local economies & threaten food security by relying on a handful of commodities | play a crucial role in providing healthy, affordable food for all |
|  | HEALTH promote standardized diets & ultra-processed foods | promote dietary diversity and nutrient-rich foods |
|  | EQUITY exploit food & farm workers; exclude small-scale producers; control resources | allow producers & food workers to retain control over their livelihoods; provide steadier incomes |
|  | ADAPTABILITY are increasingly vulnerable to shocks due to lengthy & opaque supply chains | are highly responsive & adaptable in the face of shocks (despite adverse policies) |
|  | ENVIRONMENT destroy ecological integrity & diversity through high-input, energy-intensive production | foster low-input, biodiverse small-scale food production |
|  | COMMUNITY limit participation through top-down control; undermine cultural diversity through standardization | build trust & connection within communities & play a key role in sustaining food cultures |

BOX 10.

BUILDING TRUST, CONNECTIONS, AND COMMUNITY VALUE THROUGH TERRITORIAL MARKETS

Connectivity and collectivity through territorial markets can generate long-lasting benefits and spin-off effects. For instance, producer and consumer groups, associations, and cooperatives can realise benefits such as women's empowerment, higher net returns, stronger bargaining power, contiguous cultivation, collective input and machinery buying, access to labour, group branding (e.g., differentiating chemical-free foods), price-setting, and marketing.^{307,308,309,310,311}

Relational connectivity also facilitates innovative ways to start and sustain businesses, ensure economic viability, and retain value within territories. For example:

- In **Uganda**, Participatory Ecological Land Use Management (PELUM) is a network of 66 NGOs with a collective outreach of 3 million smallholder farmers in 122 districts. It is active in establishing agroecological markets, making connections and building value through education, training, farmers field schools, consumer promotion, Indigenous and wild food visibility and convening across the agricultural value chain.³¹² These kinds of local, relationship-based territorial marketing approaches – alongside procurement programs, cooperatives, convenings, business associations and accelerators/incubators – have been identified by a 19-country study in Africa as a key factor in nurturing agroecological entrepreneurs, i.e., key change agents in food system transformation.³¹³
- In the **Indian state of Karnataka**, farmers' movements and an agroecology school have come together to organize producers in cooperatives to market their agroecological produce in dedicated stores, at prices that reconcile production costs with what people can afford. Through this initiative, bonds have been strengthened between producers and consumers, transport costs reduced, value assured through community certification – and food sovereignty has been enhanced.^{314,315}
- In various parts of **Africa**, market actors work together to build and retain value within territories: farmers use inputs from local traders rather than from seed companies, and new vendors are advanced products by farmers and traders as a form of in-kind start-up loan, repaying their lenders as they grow.³¹⁶

Territorial markets sometimes have participatory governance systems that ensure that diverse actors can benefit from those markets, and enhance a sense of collective ownership and collaboration across food systems. For example:

- The 'mercados campesinos' in **Bogota, Colombia** are held every two weeks in 16 city locations by smallholders from the central region. They are supported by training and participatory governance mechanisms which involve peasant foundations, smallholder organisations, and municipalities. The markets have resulted in higher incomes and productivity for vendors.^{317,318}
- A number of public markets in **Uganda, Zimbabwe, and Rwanda** are administered by elected market committees that interface with local government authorities. Committee members are also traders, which means they juggle both entrepreneurship and managing the market as a collective public good.³¹⁹
- New collective governance mechanisms have also been set up to advance specific territorial food system goals. The **Territoires à Vocation Agricole Biologique** ("Organic Farming Territories") in **Madagascar** were established by the government to facilitate the development of organic farming territories – with government institutions, farmers' organisations, NGOs, and private-sector actors involved in local governance. Activities include the development of value chains and local certification schemes.³²⁰



BARRIERS TO BUILDING FOOD SECURITY AND RESILIENCE THROUGH TERRITORIAL MARKETS

Despite the diversity of market forms and regional realities outlined above, territorial markets are bound together by their status (largely) outside of corporate value chains and the common challenges they face. As seen throughout the report, there are numerous dynamics holding back territorial food systems and markets from enduring, expanding, and delivering the types of benefits described above. This mix of barriers, obstacles, limitations, and risks is often interconnected and overlapping – with some more locally-contextualized and others rooted in broader global systems and structures. The section below brings together these challenges into five broad and connected themes.

BARRIER 1. PERVASIVE INEQUALITIES, EXPLOITATION, AND DISCRIMINATION

Undermines *equity* and *access*, and all livelihood-related resilience attributes

As described above, ensuring decent livelihoods for smallholders, and access to fresh food for all, are critical contributions made by territorial markets. However, **pervasive inequalities in food systems, and across societies, present barriers to territorial markets and their ability to deliver benefits to all actors.**

Territorial markets are regularly subject to closures, eviction, and other forms of violent discrimination, reflecting the fact that they are crucial spaces for marginalized and persecuted groups, and underlining the precarity of market structures in a hostile context. In particular, the informal nature of street trading and many physical markets can leave them vulnerable to closure on the basis of official health and safety standards designed for corporate value chains. Relatedly, market closures – and the selective application of these hygiene standards – are sometimes driven by land development and real estate speculation. Informality can also leave food providers vulnerable to violence, and theft of food stocks and equipment.

“ **Pervasive inequalities in food systems & societies present barriers to territorial markets and their ability to deliver benefits to all actors** ”

In many African countries, investors claim the lands where markets are located as their own. This harms territorial market systems, and infringes on the rights of thousands of farmers and marketeers to these spaces. In some regions, the use of violence and criminalization by authoritarian governments tied to global capital has extensive impacts on small-scale food providers and territorial markets.^{321,322,323}

Markets can also be sites of social struggle, with violent clampdowns and the disruption and closure of markets by the state for political purposes. For instance, the Southern Peasants Federation of Thailand works with landless farmers to occupy and redistribute abandoned plantations. Surplus food was initially sold by the community at its own local street-side

market, at low prices, and with an assurance of good quality and chemical-free food products. This informal market was destroyed by the government – yet the federation demonstrated *flexibility*, pivoting to a system of door-to-door sales and supplying produce for school lunches.^{324,325}

Territorial markets can perpetuate or fail to overcome oppressive, class and/or other marginalizing dynamics. For example, **unequal power relations can relegate the interests of some groups and close off opportunities**. The IPES-Food dialogues drew attention to markets where ‘produce mafias’ control what gets sold, and by whom. Overall, middlemen can represent an important support to small-scale farmers and traders,³²⁶ and they often shoulder high costs due to lack of adequate infrastructure for transport, storage, and distribution. Yet, exploitation is an ongoing risk. Food providers may not be producing sufficient volumes to sell directly to consumers or buyers in wholesale markets, and may have to accept lower prices from traders, with these power imbalances exacerbated by asymmetric access to market information.³²⁷

Workers throughout territorial food systems can also be subject to discrimination and poor treatment that mirrors the industrial food chain.

For example, small farm workers in the US have been documented to experience minimum wage violations, verbal abuse, long hours, unsafe working conditions, and physical attacks.^{328,329} And, though territorial markets are often intentionally developed by local actors, in some cases they are the best available – or only – economic option for food producers, workers, and purchasers.

Meanwhile, reliance on external institutions and support structures can create vulnerabilities and undermine the equity benefits of territorial markets. For example, universities and researchers often play positive roles in setting up and supporting new physical marketplaces,^{lii} yet the IPES-Food dialogue in Latin America drew attention to how these actors can sometimes appropriate markets, instrumentalizing farmers, or relegating them to the background.

lii For instance, the Quilmes National University in Argentina developed the “socioeconomic food circuits” (circuitos socioeconómicos alimentarios) to incubate and support the development of territorial market initiatives. See IPES-Food. (2023, March 14). Mercados Territoriales y Transformación de los Sistemas Alimentarios: Avances en Agroecología, Soberanía Alimentaria y Derechos Humanos. *Diálogo Latinoamericano*. Universities have also been important players in support of small-scale producers, as purchasers, through establishing/support for in-situ markets, and more generally through action-research in their regions.

Further, although their participation is generally strong in territorial markets, **women face a specific set of barriers** to fully participating in and benefitting from them. As noted above, women's participation is sometimes constrained to informal markets and street vending, where barriers to entry are lower, conditions more precarious, and economic returns more limited.³³⁰ Further, as perspectives from Latin America have underlined, women bear an unequal burden of the unpaid care economy, limiting their ability to engage with remunerated territorial markets, and – even in enabling contexts – earning less than men, pointing to the pervasive impacts of entrenched inequality.^{liii,331} Relatedly, the IPES-Food dialogues identified significant reliance on volunteer labour to sustain territorial markets – often by women, alongside many other duties – as a major vulnerability of these markets.

“Access to territorial markets remains a challenge in some contexts, due to a broad lack of adequate social protection & entitlements”

In territorial markets, like in many other settings, persistent economic and social inequalities can also play out in terms of who is able to buy food, sometimes undermining the equity benefits of territorial markets. Despite public markets extensively reaching low- and middle-income populations in the Global South, **greater access remains a challenge in some contexts, due to a broad lack of adequate social protection and entitlements.** Although there are innovative approaches to strengthen access and solidarity in territorial markets such as healthy food prescriptions, vouchers, and community-funded CSA subscriptions, some forms of direct sales can be unaffordable to low-income populations,³³² while certified organic food can be prohibitively priced in some settings. (For more on

affordability and social protection, as well as examples of social solidarity and access initiatives in territorial markets, see Leverage Point 4).

The rise of **digital sales** may generate future opportunities for territorial market actors (see Section 2.2 and Section 5), but in many contexts it also risks exacerbating inequalities. For example, AFSA's pan-African study identifies risks of a deepening digital divide impacting women and rural areas, alongside other risks associated with loss of face-to-face connection, and the cooptation of successful start-ups.³³³

BARRIER 2. SCARCITY OF SCALE- APPROPRIATE INFRASTRUCTURE AND FINANCE

Undermines flexibility/redundancy, diversity, adequate resourcing, connectivity, preparedness

A key obstacle facing territorial markets the world over is a **lack of scale-appropriate physical infrastructure** of all kinds, reflecting a general policy bias towards central planning over territorial development, and corporate capture of key governance processes (see below: Systemic and cross-cutting biases). Gaps in scale-appropriate infrastructure include production, processing, storage, transport, road networks, refrigeration, marketing, and institutional kitchens.^{334,335,336,337,338} Informal markets and street vendors lack basic services like clean water, affordable energy, and sanitation facilities as well as appropriate storage for fresh foods.³³⁹

Sometimes termed the “missing” or “hidden middle” between food production and consumption,^{340,341} these gaps have extensive implications on the ground. For instance, **small-scale producers lacking food storage capacity may be forced to sell at low prices when there is a glut on the market**, rather than at higher prices later in the season.

liii Including unequal access to land and resources; and physical and nutritional insecurity within the household and in communities, in addition to uneven time spent on care responsibilities. IPES-Food. (2023, March 14). Dimensión de género: violencias e inequidades. Sección 4.2 in Mercados Territoriales y Transformación de los Sistemas Alimentarios: Avances en Agroecología, Soberanía Alimentaria y Derechos Humanos. *Diálogo Latinoamericano*. p.15.

Fisherfolk and other providers of perishables may lack access to refrigeration or clean water – forcing quick sales at low prices to avoid spoiling or contamination. These problems reflect policy biases and underlying power imbalances, which are clearly visible in critical regional/urban planning processes. Generally, there is a lack of distinction between forms and scales of food businesses and the different interests they serve, with big players much more likely to participate in and influence planning consultations and decisions.^{342,343} As a result, land use planning and zoning in rural, urban, and peri-urban contexts can end up creating barriers to territorial market infrastructures, e.g., by limiting both food production possibilities, and the spaces within which markets can operate.

Infrastructure gaps manifest in specific ways across various territorial marketing channels, often presenting major roadblocks. In particular, **the potential to bring public procurement ‘closer to home’ is held back by a lack of on-site processing capacity**, limiting the ability of hospitals, prisons, schools, and other institutional purchasers to buy from smaller food providers and driving them to larger corporate vendors with pre-sale processing mechanisms.³⁴⁴ Urban and peri-urban agriculture offer another example: despite their many benefits, they remain significantly under-prioritized in infrastructure planning, urban land use, and mobility and transport policies.³⁴⁵ Specific supports required for urban food marketing have been identified, including: locally managed and scale-appropriate logistics mechanisms; business advice, especially for new entrants; processing hubs; and strategies for product differentiation and value-addition.³⁴⁶

These barriers are reinforced over time by a **lack of scale-appropriate training and support mechanisms** (e.g., support to train new small-scale food providers and processors; to manage farms; to develop skills in marketing, branding/labeling, short food chain logistics, business planning, pricing, accounting). Where they do exist, vocational, agricultural, and food training programs rarely focus on small-scale food provisioning. For instance, in France, butchers are no longer trained to source directly from farms.

“ **The potential to bring public procurement ‘closer to home’ is held back by a lack of infrastructure** ”

Another emerging and increasingly important gap is in information and communications technology (ICT) infrastructure. Already, there are significant barriers with regards to technology and information resources (e.g., poor internet service in rural areas, high cost of phones, data, and electricity),^{liv} and technologies suitable/affordable for smaller scales of production (e.g., equipment, traceability, food safety, packaging, nutritional analysis).^{347,348}

Productivist, trade-centric approaches to food security also permeate rural development, land use and urban planning policies in a way that ripple out widely – leading in particular to the infrastructure gaps described above. Generally, rural-urban transport infrastructure that connects villages, towns, and smaller cities is lacking and under-prioritized relative to city-to-city connections and port highways.^{349,350,351,352} Further, local housing and transport policies can reinforce urban density, and make people increasingly reliant on big retailers. For instance, in Cape Town, South Africa, large-scale supermarkets have had privileged access to the policymaking table, driving a transformation of the city's food distribution landscape. This has undermined food security, through the sidelining of small-scale and informal businesses that are often important sources of food for the most food insecure residents.³⁵³

Further, though territorial markets broadly performed well throughout the pandemic, deliberate and inclusive structures and methodologies to collectively plan for what can be called ‘predictable surprises’³⁵⁴ (e.g., pandemics, crop disease, conflict) that may impact food systems into the future, are lacking.

liv There is a growing literature studying the effects of information technology (namely cellphones, smartphones, and internet access) on territorial markets. See for instance: Baumüller, H. (2017). *The Little We Know: An Exploratory Literature Review on the Utility of Mobile Phone-Enabled Services for Smallholder Farmers*. Journal of International Development, vol.30:1, pp.134-154; and Wyche, S., Steinfeld, C. (2015). *Why Don't Farmers Use Cell Phones to Access Market Prices? Technology Affordances and Barriers to Market Information Services Adoption in Rural Kenya*. Information Technology for Development, vol.22:2, pp.320-333.

Territorial markets are underpinned by small-scale food producers, and over decades, their needs have also been systematically ignored. One study estimates that over 70% of smallholders' needs for financing go unmet,^{355,356} including over 90% of Sub-Saharan Africa's small farmers who have no access to formal credit.³⁵⁷ Limited loans and formal banking opportunities for marginalized/rural communities can lead to a variety of (often negative) outcomes, including a reliance on local savings groups, family, and friends for informal loans, predatory lending, and lending arrangements with higher interest rates (due to the perception of higher risk and lack of collateral).^{lv} Fluctuations in global interest rates can also rapidly bankrupt (and render landless) farmers who may be operating on slim margins and need to repay rising loans.³⁵⁸

“ 70% of smallholders' needs for financing go unmet ”

Lack of political and financial support for small-scale farmers compounds the difficulties they face in addressing persistent challenges regarding economic viability: producer confidence to invest in territorial markets can be undermined by unpredictable demand, the difficulty differentiating higher value products, and the time-consuming nature (and thus the opportunity costs) of selling directly to consumers.

Lack of appropriate finance manifests as a problem across a number of territorial marketing channels. For example, lack of investment is undermining the viability of wholesale markets and contributing to the infrastructure gaps described above. In a context of privatization along the food chain, these markets

(typically public municipal infrastructure or public-private partnerships) have generally been neglected by national policy-makers, and considered only at the municipal level – despite their importance for food security, particularly in Africa, where 80% of domestic food flows through wholesale markets.³⁵⁹ Where it exists, investment related to wholesale markets has been more focused on operations and efficiency, rather than systemic approaches to enhance their connections with smallholder farmers and artisanal fishers, and to contribute to delivering healthier and affordable diets.

BARRIER 3. UNFAVOURABLE RULES AND ENCROACHMENT OF CORPORATE NORMS

Undermines *autonomy, diversity, and ecological integrity*

Territorial markets are constrained not only by a lack of dedicated infrastructure and financial support, but also by unfavourable regulatory environments and the **ongoing pressure to conform to the norms and preferred modalities of corporate chains** – or be assimilated into them.

A common obstacle in many regions is that **health, hygiene, and certification standards are developed according to the norms of industrial food systems**, and these rules are often shaped by large corporations themselves.^{lvi,360} These rules are ill-suited for smaller producers, processors, and short supply chains, making it difficult for territorial market actors to sell to institutional or commercial buyers who have to follow state certification guidelines and regulations. For example, hospitals and healthcare facilities in Canada serving Indigenous populations that wish to procure wild game for their patients are blocked or impeded by regulation, including meat processing

lv For instance, a study on agroecological entrepreneurs in 19 African countries documented bank loan interest rates as high as 30%. See The Agroecology Fund & Alliance for Food Sovereignty in Africa. (2021). *Supporting African Agroecological entrepreneurs. Results of Phase One.* (download [PowerPoint presentation](#))

lvi There are longstanding concerns about how small-scale producers, processors, and retailers are excluded by privately-managed rather than publicly-regulated standards and certification that serve corporate interests. For example the GLOBAL G.A.P certification owned by a German corporation. See Challies, E. (2013). *The limits to voluntary private social standards in global agri-food system governance.* The International Journal of Sociology of Agriculture and Food, 20(2), 175-195.

standards designed for large-scale industrial abattoirs. In Labrador and Newfoundland, hard work over years was required by the Nourish Anchor partnership – Innu, Inuit, and Southern Inuit Indigenous groups, a regional health authority, a non-profit, and the provincial and local governments – to find pathways through complex regulatory barriers.³⁶¹

Markets for small-scale fisheries are also affected by unfavourable rules and the encroachment of corporate norms. Evidence from Africa shows that governance of fishing largely leads to constraints on small-scale fisheries while failing to constrain industrial operations, leading to “survival of the richest, not the fittest”.³⁶² Further, moratoria on some fisheries reinforces the status quo, leaving control in hands of big exporters.

Informal markets face specific challenges around health and hygiene – and pressures to conform to regulatory frameworks designed by and for corporate value chains. For example, following the outbreak of COVID-19, harmful generalizations circulated about the purported biosecurity risks of wet markets, leading to widespread shutdowns and calls for formalization and regulation of these markets.^{363,364,365} However, formalization can lead to loss of control by small-scale food providers, and/or loss of livelihoods. These challenges are just one dimension of bigger gaps in appropriate scale-specific governance, management, and investment approaches, as described above.

Further, **producers may be forced to sell into corporate value chains on unfavourable terms**,^{lvii} as these chains expand and encroach on other markets. The 2023 State of Food Security and Nutrition in the World report draws attention to the risk of supermarket expansion restricting access to other channels for smallholders.³⁶⁶ In a context of highly unequal power relations, corporate norms may erode the values, approaches, and territoriality of these production systems. This may include industry buyers pushing communities to override customary laws that

protect biodiversity and sustainable use of resources, and support local access to nutritious foods. For instance, in India, local populations (mostly Indigenous peoples) are facing pressures to move traditional mango harvesting dates forward, as commercial entities seek access to green mangoes for industrial pickle production.^{lviii}

“ Informal markets face specific challenges around health and hygiene, with harmful generalizations made about the purported biosecurity risks of wet markets in particular ”

BARRIER 4. CORPORATE COOPTATION

Undermines equity, autonomy, and ecological integrity

Co-optation by large corporate actors can be observed across a whole range of territorial marketing channels and in a variety of contexts, eroding the specificities of these markets and curtailing their contribution to food security and resilience.

In particular, there have been **systematic attempts by large corporations to appropriate terms like ‘local’³⁶⁷ or ‘family farmer’** and the positive qualities associated with them. Part of this is happening within corporate-controlled spaces. For instance, Walmart uses what has been termed an “industrial local” approach where it markets food grown within the

lvii For instance, Walmart, which sells one quarter of US groceries by value, leveraged its dominance during the COVID-19 pandemic to suddenly mandate a 98% completion rate for ‘on-time and in-full’ (OTIF) orders, up from the previous standard of 70%. This drastic increase was beyond the ability of many suppliers to meet, resulting in fines of 3% of their order value for non-compliance. Smaller producers, who often use ‘less than truckload’ (LTL) shipments managed by third parties, were particularly disadvantaged. Mitchell, S., & Knox, R. (n.d.). *Boxed-Out-Report-ILSR-2022.pdf*. Institute for Local Self-Reliance. Retrieved 20 May 2024; Souza, K. (2020, September 3). *Walmart demands all suppliers comply with 98% on-time in-full shipment rule*. *Talk Business & Politics*.

lviii In this case, territorial laws grounded in conservation and sustainability govern when wild foods can be harvested. Traditionally, mangoes can only be picked as of a certain date in May, when they are ripe, and the seed is mature enough for regeneration. See IPES-Food. (2023, March 16). *Territorial Markets and Food System Transformation: Advancing Agroecology, Food Sovereignty, and Human Rights*. *South and South East Asia Dialogue*.

state by very large companies as 'local' (see Box 7 for more on 'local').³⁶⁸ One particularly egregious US example has seen the marketing of products as 'family farmed' despite not only being produced in corporate chains, but relying on coercive prison labour.^{lix,369,370} Some quality certification schemes have also proven vulnerable to co-optation. For instance, in Mexico, denominations of origin for tequila and mezcal have been captured by economically dominant actors, failing small-scale producers and workers.³⁷¹

There have also been prominent attempts to co-opt 'resilience' itself. For instance, the newly signed Indo-Pacific Economic Framework for Prosperity Agreement Relating to Supply Chain Resilience embeds the prioritisation of global supply chains, to the detriment of more sustainable, shorter, territorial supply chains.^{372,373,374}

But co-optation is not confined to corporate-dominated spaces. For example, in some cases **public markets have been diluted or appropriated, allowing industrially-produced foods to be sold at so-called farmers' markets.**³⁷⁵ Meanwhile, online markets that present themselves as 'local' or 'territorial' may in fact carry a high risk of having been co-opted by powerful actors. And even spaces traditionally off limits for corporate actors are now being penetrated, with large multinationals recognizing the potential of the so-called 'bottom of the pyramid' and entering the informal sector – with dubious marketing practices.^{lx,376} These approaches are legitimized through misleading discourse, with 'local economic development' sometimes used to refer to corporate chains establishing themselves in poor communities.³⁷⁷

Nonetheless, there are also many grey areas and uncertain outcomes as new types of supply chain relationships are developed in close proximity to corporate chains. State-brokered partnerships between small-scale agroecological farmers and mega cooperatives in Andhra Pradesh is one such example, underscoring the contradictions in a context where India's agroecological supply chains are challenged by privatization and neoliberal forces.^{378,379,380,381}

SYSTEMIC AND CROSS-CUTTING BIASES

These barriers illustrate **widespread and systemic biases in favour of capitalist conceptualizations of food markets, industrial agriculture, corporate value chains, and export commodity trade.** They also reflect state antipathy towards local/informal food chains, particularly in urban contexts in the Global South. The existence of these underlying policy biases is particularly significant given that the state is a key actor in a number of territorial marketing channels, and a key determinant of whether or not those markets are able to thrive and deliver on their full potential for food security and resilience.

“**Global trade rules can obstruct governments wishing to purchase food from their farmers**”

Crucially, the prevailing bias towards industrial agriculture, championed by powerful agribusinesses, international financial lenders, and aid donors **pushes countries to participate in global agri-food value chains,**³⁸² and to sign up to **international trade agreements shaped around the needs of corporate global commodity chains.** The asymmetric subsidy regime embedded in the WTO's Agreement on Agriculture (AoA) allows wealthy countries to offer substantial domestic support to their producers, who dump agricultural products in the Global South, undermining the smallholder production that underpins territorial markets.³⁸³ These same subsidy rules are used, for example, to obstruct governments wishing to purchase food – including from local/territorial producers – and build food security reserves.³⁸⁴

lix Hickman's 'Family' Farms in Arizona demonstrates corporate appropriation of value-based branding: the supply chain was so reliant on prison labour that during the COVID-19 pandemic they relocated women prisoners to an onsite prison labour camp – a seemingly unprecedented example of prisoners being detained on-site at a US corporation, for the sole purpose of working for that corporation. Whitman, E. (2023, February 15). *How a Giant Egg Farm Made Money Off Women Prisoners in Dangerous Conditions*. Cosmopolitan.

lx Marketing practices include removing packaging, single-servings, bespoke last-mile distribution and selling smaller quantities using lower-quality ingredients. See Nordhagen, S. & Demmler, K.M. (2023). *How do food companies try to reach lower-income consumers, and do they succeed? Insights from a systematic review*. Global Food Security 37, 100699.

The WTO's rules on public food stockholding have been contested by net-food importing and Global South countries since the 2008 food price crisis, but negotiations that began more than a decade ago have yet to reach the mandated permanent resolution.³⁸⁵ Further, the latest bilateral and regional trade agreements are using 'resilience' as a pretext to extend liberalization into new frontiers, with potentially catastrophic impacts for smallholders and other territorial market actors (see Box 11).

The global trade bias generates harmful dynamics at multiple scales, heavily impacting access to land and resources for smallholders and other territorial food system actors.

Broadly, international trade and investment agreements favour big business, while finance, credit, and infrastructural support flows to export-driven large-scale monocrop production.³⁸⁶ The focus on industrial export monocultures and ultra-processed foods crowds out diversified food production in the Global South, as local processing and distribution of more healthy foods are starved of resources.³⁸⁷ Further, the trade bottlenecks described above allow corporations to monopolize key stages of food chains, and undermine decentralized and self-reliant systems.³⁸⁸ These dynamics further undermine the ability of communities and regions to nourish themselves during crises.

Intellectual property regimes and seed legislation also reflect the bias towards industrial agriculture and corporate commodity chains, and undermine the basis of peasant agriculture/small-scale agriculture. Through trade agreements, treaties, regulatory frameworks, and national seed legislation, small-scale and community seed breeding, saving, and exchange has been forbidden and even criminalized.^{389,390} Further, through the prioritization and promotion of input-reliant seed development, global players have driven up dependence on herbicides such as glyphosate fifteen-fold over a twenty year period, with concomitant restrictions on local availability of alternative seed stock.³⁹¹ In conjunction with the trade imperatives described above, these approaches undermine government research capacity, investment, and other mechanisms that could support more resilient smallholder-based markets.³⁹²

Through these and other favourable policies, **corporations have been able to increase their economic and political power – and progressively tighten their grip over food systems.** Corporate power and lobbying have a direct influence over state-level regulation, investment, credit, infrastructure, insurance, and other tools that prop up and perpetuate the domination of commodities and export sectors.^{lxi} In the US, for example, corporate power has been wielded to weaken organic standards despite mobilization by farmers.^{393,394,395}

BOX 11.

IPEF: TRADE LIBERALIZATION IN THE NAME OF 'RESILIENCE'

Using the pretext of building 'resilience', regional free trade deals are aggressively pursuing market liberalization and threatening national regulations that could provide critical support to small-scale producers and local markets. For example, commitments and provisions under the 14 nation Indo-Pacific Economic Framework (IPEF), and its Agreement Related to Supply Chain Resilience, advance the interests of corporate value chains, including: undermining the ability of governments to prohibit the import and sale of genetically modified (GM) seeds and products;³⁹⁶ and promoting 'climate smart agriculture' such that subsidies to local producers for necessary irrigation, electricity and fertilisers are impeded.³⁹⁷ The focus of the IPEF on promoting the free flow of digital technology will undermine the ability of governments to create vibrant domestic digital economies that can support territorial markets, and a variety of other spheres.^{398,399}

lxi Dumping happens when commodities produced in, generally wealthier countries (often through subsidies), are dumped into markets across the Global South, eroding possibilities for local production to compete with imports. See Murphy, S., & Hansen-Kuhn, K. (2020). *The true costs of US agricultural dumping*. *Renewable Agriculture and Food Systems*, 35(4), 376-390.

Their dominance also sees subsidies channelled to corporate value chains, masking the true costs of their production methods.⁴⁰⁰ Corporations' rising control over key nodes of the agri-food chain is becoming increasingly lucrative: in 2022, agribusinesses were able to hike fertilizer prices and secure profits 500% above 2020 levels, while farmers struggled to afford fertilizer, and Global South governments strained public finances to keep importing them.^{401,402}

“**As farmers struggled to afford fertilizer in 2022, leading firms' profits leapt 500% compared to 2020**”

Beyond classic lobbying for preferential policies, **the corporate sector has demonstrated its capacity to seize the opportunity of disruptions to expand its power** more broadly: arguably, the 2021 UNFSS is an example of elite actors using crises and the resilience imperative to rearrange food system governance to their advantage^{lxii,403,404} – and an illustration of the ‘shock doctrine’, whereby disruption is used to erode the status quo ante rather than building resistance, and more sustainable alternatives.^{405,406}

Powerful corporations are also able to dominate food system discourse in a way that reinforces their power and discredits territorial markets.

As noted above, territorial markets – particularly more informal channels – are often portrayed as niche, alternative, backwards, unhygienic, in need of modernization, and/or only appropriate for foods with short shelf lives, and hence not viable mainstream marketing systems for the future.⁴⁰⁷ These narratives are clearly related to assumptions about what markets are and how they should operate in a context of unfettered capitalism.

One IPES-Food dialogue participant described such assumptions as a “poverty of the imagination”. In Zambia, for instance, these preconceived ideas have had a direct impact on governance, with policymakers and funders promoting “more modern” retailing spaces while acting to remove/control informal markets and street vendors – without consideration of the implications for broader food systems or local food security.⁴⁰⁸

Narratives about ‘cheap food’ also continue to reinforce the status quo.⁴⁰⁹ Delivering relatively affordable food for low-income populations is in fact a hallmark of territorial markets (see Section 3). However, the growing perception that food should be ‘cheap’ ultimately strengthens corporate value chains and their highly damaging practices.^{lxiii} Over decades, the prioritization of large-scale industrial food production – via subsidies, research funding, and incentives for specialization – has been rationalized as the way to produce affordable food.⁴¹⁰ Yet these narratives mask the fact that mass production of food commodities has delivered neither food security nor adequate livelihoods for many producers.⁴¹¹

In some settings, small-scale producers and processors cannot support themselves from their farm incomes and must work off-farm for survival, undermining their ability to sustain and grow production.^{412,413} In turn, consumers living on low incomes are highly price sensitive. In other words, the ability of territorial market actors to sustain producer livelihoods and continue delivering affordable food for low-income populations is in fact undermined by narratives that obscure the realities of food production and marketing. Clearly these challenges extend beyond narratives, and require comprehensive actions to address poverty and improve access to food, including via social protection policies (see Section 5).

Critically, as skewed economic incentives and biased policy frameworks combine with harmful narratives, **there is an erosion of the place-based food cultures that underpin some territorial markets.** It was repeatedly mentioned in the IPES-Food regional dialogues that food cultures are changing

lxii The president of the World Economic Forum, Borge Brende, identifies multistakeholderism as essential to resiliency. See WEF. (2019, July 2). *Why a multistakeholder approach is essential to our risk resiliency*. And action track 5 of the UNFSS focused on this.

lxiii The FAO estimates that the global hidden cost of agrifood systems in 2020 (including emissions, water-use, land use change, unhealthy diets, undernourishment, and poverty) was USD 12.7 trillion. *The State of Food and Agriculture 2023*. (2023). FAO. <https://doi.org/10.4060/cc7724en>.

and increasingly being undermined, with a loss of understanding of food, recipes, and food practices; a lack of connection to the land and sea and how food is grown, caught, harvested, and processed; a forgetting of wild foods within Indigenous communities; a failure to pass on traditional know-how between the generations as younger people leave family farming or food businesses; and a growing trend of youth being drawn to fast food.

“ The growing perception that food should be ‘cheap’ strengthens corporate value chains and their highly damaging practices ”

Urbanization is a key factor significantly re-shaping food cultures and diets, with widespread shifts from more diversified nutrient-rich diets to commodities such as rice and wheat.⁴¹⁴ At the same time, fast food chains and supermarkets are viewed as symbols of modernization, increasingly gaining market power on all continents.^{lxiv, lxxv, 415}

In sum, **a vicious cycle is allowing corporations to extract huge profits, control food system trajectories, and capture decision-making and regulatory processes** – paving the way for the continuation of extractive and resilience-eroding practices. By undermining producer livelihoods and degrading ecosystems, corporate value chains are crowding out non-corporate systems and making themselves increasingly central – in turn providing justification for propping them up in the name of ‘resilience’.

The fact that territorial markets have continued to exist and make critical contributions to resilience and food security in this adverse context indicates their unique relevance and strengths. In the next section, we identify levers that could be pulled to overcome the range of barriers described above, rebalance policies and economic incentives in favour of territorial markets, and strengthen territorial markets and the communities and cultures in which they are embedded.

lxiv Supermarkets and hypermarkets’ market value stands at over USD 3,7 billion in 2023 and is expected to grow to USD 4.3 billion until 2027 at a 6.5% Compound Annual Growth Rate (CGAR). See The Business Research Company. *Supermarket and Hypermarkets Global Market Report 2024*. This has been led by exponential regional growth over the last twenty years. For instance, from 2003 to 2017 modern food retail sales grew by 297% in Sub-Saharan Africa and 181% in the MENA region. See Bahn, R. A. & Abebe, G. K. (2019). *Food retail expansion patterns in sub-Saharan Africa and the Middle East and North Africa: institutional and regional perspectives*. Agribusiness. From 2001 to 2009 75% of modern retail sales in India arose in chains formed after 2006. See Reardon, T., Timmer, C. P. & Minten, B. (2012). *Supermarket revolution in Asia and emerging development strategies to include small farmers*. Proceedings of the national academy of sciences, 109(31), 12332-12337.

lxxv There are also positive shifts in food cultures in some places, especially in terms of gender discrimination, where women are challenging patriarchy in food systems, and organizing for better access to food. Herrmannsdörfer, A. N. (July 2020). *Cooking up political agendas: a feminist guide on the right to food and nutrition for women in rural areas*. FIAN International; Duncan, J. & Claeys, P. (October 2020). *Gender, COVID-19 and food systems: impacts, community responses and feminist policy demands*. Women’s Working Group of the Civil Society and Indigenous Peoples’ Mechanism (CSM) for relations with the UN’s Committee on World Food Security (CFS).



THE WAY FORWARD: HOW TO STRENGTHEN TERRITORIAL MARKETS AS CORNERSTONES OF FOOD SECURITY AND RESILIENCE

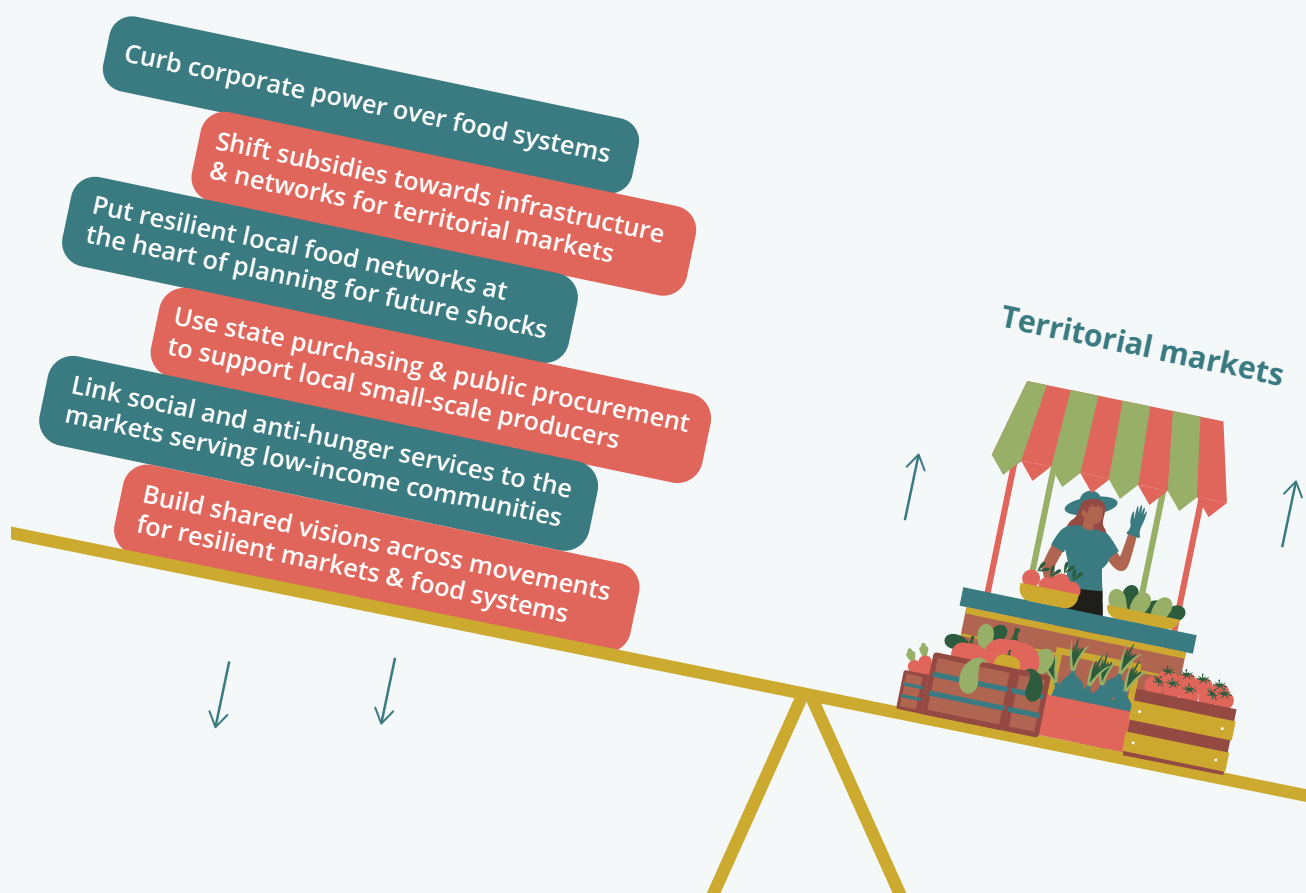
As seen through the many examples above, territorial markets can serve to push back against the social, cultural, spatial, ecological, and economic disintegrations of more extractive capitalist food systems. Although there are sometimes barriers to affordability as with other markets, there is clear evidence that territorial markets can provide equitable access to food. This is especially clear in lower- and middle-income countries, and particularly when targeted support is provided by states to enhance access to food. As widely documented in the literature and demonstrated through the IPES-Food dialogues, some territorial markets are also critical cultural and social spaces. Further, their cultural rootedness means

that these markets benefit from – sometimes hidden – forms of governance that allow them to function well. In other words, the resilience of territorial markets is symbiotic with the resilience of the community at large.

Since the pandemic, there has been growing appreciation of the wide-ranging value and purpose of territorial markets. However inadvertently, COVID-19 created an opportunity for experimentation in territorial forms of marketing, and generated innovations whose lifespan exceeds the pandemic. In some places they pushed back against corporate consolidation and recentered the availability of healthy and diverse local foods.

FIGURE 4.

LEVERAGE POINTS TO SUPPORT TERRITORIAL MARKETS



We must now learn those lessons and build on those precedents. Moving forward, **systemic and wide-ranging solutions are needed to transform our food systems**. In this section, we advance high-impact leverage points, focusing on targeted actions to address critical barriers faced by key forms and channels of territorial food marketing, and strengthen territorial food systems more broadly.

LEVERAGE POINT 1. MAKE 'TERRITORIAL MARKETS' INTO A CENTREPIECE OF FOOD SYSTEM ADVOCACY AND ACTION

Sitting alongside and overlapping with agroecology, 'territorial food systems and markets' provide a useful shorthand for resilience-building food provisioning webs outside of corporate chains.

To maximize benefits, much more can be done to position territoriality as a key feature of food system transformation, and build common cause between the dispersed actors of territorial systems and markets.

This leverage point advances priorities in the areas of data gaps and definitions, networking, narratives, and enhancing synergies between agroecology and territorial markets.

DATA GAPS AND DEFINITIONS

Much of the recent analysis undertaken by the FAO, social movements, non-profits, and researchers on territorial markets has drawn attention to smaller-scale food production and its critical role in healthy and diverse diets across global contexts.⁴¹⁶ Recent efforts have also pushed back against the false assumption that small-scale producers need assistance to be integrated with 'the market' (understood largely as the corporate agri-business value chain) – instead demonstrating that they are already well integrated into a diversity of (often more resilient and multifunctional) territorial markets.⁴¹⁷

It is key to step up efforts to **fill data gaps on territorial food systems and markets** – including their organization and scope, as well as contributions (actual and potential) to food system resilience, food sovereignty, and food security. **Advancing common understandings/definitions**, with clear demarcation from corporate chains, is also important.^{lxvi} Building on this report and other recent studies, comprehensive conceptions of food system resilience must be further advanced, grounded in the six dimensions of food security (see Introduction). Doing so would help move the definition of food system resilience closer to food sovereignty,⁴¹⁸ which emphasizes putting control into the hands of small-scale food producers and provisioners, and working with nature. The inclusion of these dimensions in future definitions would help reflect the centrality of ecological sustainability and power dynamics in food system resilience, as highlighted throughout this report.

In parallel, **it is essential to further scrutinize the non-resilience of industrial/corporate chains** and their emerging vulnerabilities. This can be achieved by advancing research, communications, and media initiatives that critique the corporate value chain's impact on resilience and debunk narratives about these chains 'feeding the world'. In parallel, it is important to continue telling stories from territorial markets, underlining their many benefits and centrality in food systems. Given the rapid growth of urban populations, and the importance of territorial markets for urban food security, specific research attention should be given to these sectors.

This research should be participatory and context specific.^{lxvii,419} For instance, participatory food web mapping is an approach where community members come together to make sense of their food basket (e.g., how much of each food is required for everyone to be food secure, what is produced locally, what comes from outside), identifying opportunities to build or strengthen local production, processing, and storage. This mapping can also yield social entrepreneurship or investment pathways for the community – for instance highlighting where surplus foods provide opportunities for value addition. Since these and other datasets can be monetized and appropriated for private benefit, safeguards should also be established – including, potentially, storing data within the territory, under local democratic data governance arrangements.

NETWORKING

To maximize benefits and share learnings, it will also be important to **strengthen networking and representation mechanisms for small-scale actors within territorial markets, and strengthen cross-movement bridge-building**, *inter alia* to build strategies and shared narratives about food security and resilience beyond corporate chains. The formation of new initiatives and marketing coalitions reflects growing momentum in this area (see Box 12). A high priority is capacity development for producers, workers, and trader associations, so they are better able to represent and defend their interests.

lxvi For example, informal markets and street vendors are often missed, including because categories and metrics developed in high-income countries that can be grounded in approaches such as static built environments are unsuitable for capturing the importance of the dynamic informal and semi-formal markets.

lxvii For instance, the *Llevo el campo Colombiana* campaign, in Colombia, led by RENAF (the national network of family farming), works to make farmers' markets visible and more viable through farmer-controlled participatory data collection about smallholder experience from field to market. The campaign, designed to transform power within territories, has helped marketing and distribution directly, as well as generated useful information for decision-making, supportive actions, and the recognition of markets as spaces for building social fabric. See RENAF. *Our Markets*. Accessed May 23, 2024.

BOX 12.

EMERGENT AND FLOURISHING NETWORKS

In the **Canadian province of Quebec**, the *Forum systèmes alimentaires territoriaux* (“Territorial food systems forum”), a collective voice building bridges between different stakeholders to strengthen the territories’ food systems, shares issues and success stories from 17 regions, and undertakes joint advocacy. Supporting the expansion of smallholder presence in markets is a key pillar of their organising.^{lxviii}

The **Market Cities Initiative** was inspired by Barcelona, with its thriving network of public markets in every neighbourhood. In 2023, at the 11th Market Cities conference in Toronto, an international network was launched to support public market stakeholders.⁴²⁰

Since 2021, markets and associations from 70 countries have come together with a common voice as the **World Farmers Market Coalition** to build and support farmers’ markets to serve as “interactive symbols of commerce and community” – and as a means to achieving SDG 2: Zero Hunger.⁴²¹

BOX 13.

CROSS MOVEMENT INITIATIVE: LOCAL CURRENCY-BASED EXCHANGE

Locally developed currencies are a way to enable food sales that circumvent and challenge corporate value chains, and show how territorial food markets can be part of a wider transformation, involving allies with multiple goals. For example, ‘Le Leman’ is a European/Swiss cross-border citizen’s currency with roots in the food system, highlighting the promotion of short supply chains grounded in small-scale food production. Farmers’ markets and other food marketing forms are important avenues for the use of locally developed currencies.^{422,423}

Nonetheless, in many contexts there is an ongoing erosion of civil and community space, undermined by forces like political clampdowns, and budgetary and time pressures faced by households. The kinds of collective social resources (e.g., community spaces, dialogue, media) that can foster cohesion, self-determination, and goal-setting are being undermined. **These collective resources are needed to help set the context for myriad market-related initiatives where people come together**, such as group food production and marketing, food policy councils, and food hubs.⁴²⁴

POSITIONING TERRITORIAL MARKETS AND AGROECOLOGY TOGETHER

As highlighted throughout this report, agroecology plays a key role in delivering food system resilience,^{425,426,427,428,429} and the synergy between territorial markets and agroecology is gaining attention. Agroecology is understood as having 13 principles,^{lxix} and Principle 11 is particularly relevant to the close-to-home, relationship-rich markets discussed throughout this report: “Connectivity – Ensure proximity and confidence between producers and consumers through promotion of fair and short distribution networks and by re-embedding food systems into local economies”.⁴³⁰

lxviii This new forum emerged in a province characterised by strong promotion of local produce, in a country with a network of municipal, community, provincial, and national food policy councils. See *ForumSAT* (accessed May 23, 2024) and Schiff, R., Levkoe, C.Z., & Wilkinson, A. (2022). *Food Policy Councils: A 20-Year Scoping Review (1999 – 2019)*. *Frontiers in Sustainable Food Systems*, 6, 868995.

lxix Recycling, input reduction, soil health, animal health, biodiversity, synergy, economic diversification, co-creation of knowledge, social values and diets, fairness, connectivity, land and natural resource governance, participation. See HLPE. (2019). *Agroecological and other innovative approaches for sustainable agriculture and food systems that enhance food security and nutrition*.

Further, reports by the FAO High Level Panel of Experts on Food Security and Nutrition have underlined that territorial markets and agroecology can support the six dimensions of food security.^{431,432,433} Recent dialogues on agroecology and territorial approaches co-hosted by the FAO, Biovision, and Food Policy Forum for Change⁴³⁴ also note that there is a broad range of areas where the two together address key challenges; that agroecological principles and practices (such as food and livelihood security and sustainable production) can help guide territorial development; and that territories offer an ideal scale to implement and maximize agroecological transition. They also highlight that the integration of agroecology and territorial approaches into a 'blended model' can help rebalance asymmetrical power relations in food systems, and empower small-scale producers, Indigenous Peoples, communities and vulnerable groups. Social enterprise grounded in these synergistic approaches is a particularly high-potential approach that can yield multiple social, ecological, livelihood, and food security impacts. As such, **opportunities to position territorial markets together with agroecology in policy and practice should be maximized wherever possible**, as well as exploring ways to apply agroecological principles all along the supply chain – including in processing and manufacturing.

LEVERAGE POINT 2. CHANNEL (NEW) FUNDING FLOWS TO TERRITORIAL MARKETS

It is clear that there are major gaps in funding for territorial food systems and markets (see Barrier 3). Meanwhile, the industrial food system is awash in hundreds of billions of dollars of damaging subsidies and other public supports.^{lxx} Without a more enabling policy environment, the ability of territorial markets to deliver benefits will be curtailed, and despite the staying power they have displayed, these markets may struggle to continue operating as the pressures on them ratchet up. **It is therefore essential to rebalance financing in support of territorial**

markets. This section identifies funding priorities and addresses where the money can be found.

FUNDING PRIORITIES

To a great extent, we know where the money should go to support territorial markets and enhance their resilience qualities. Drawing heavily on the insights and recommendations advanced by stakeholders during the IPES-Food territorial market dialogues, as well as the work of AFSA and others, below are key funding priorities:

- **Access to subsidies, credits, investment, and insurance** for territorial food systems actors to invest in land, operations, and equipment. With a focus on small-scale agroecological food providers, and in order to overturn systemic and intersectional barriers, it is important to prioritize well-planned preferential credit, policies, and programs to women, Indigenous Peoples, racialized groups, youth, and other marginalized peoples.
- **Funding for scale-appropriate infrastructure** throughout rural, urban and peri-urban shorter-supply chains and food webs (e.g., farm-level, storage, processing, transport, cold-chain, clean water, low-cost energy, sanitation, food safety), public or collective infrastructure (e.g., new retail, wholesale and wet markets spaces and in-situ upgrading of existing ones, warehouses, transport and logistics, food hubs, institutional kitchens), for all types of territorial markets.
- **Training programs for sustainable small-scale food provision, processing, transformation, and marketing**, as well as funding for research and development directed towards territorial markets and agroecology, including the diversification of species and crop breeding.
- **Developing and supporting rural infrastructure and programming** (e.g., hospitality infrastructure, school trips) that brings people to where the food comes from, building urban/rural connections, expanding livelihood options, and championing multifunctional agriculture.

lxx “[T]he Food and Agriculture Organisation (FAO), the UN Development Programme (UNDP) and the UN Environment Programme (UNEP) finds that 87% of current support to agricultural producers, approximately USD 540 billion per year, include measures that are often inefficient, inequitable, distort food prices, hurt people’s health, and degrade the environment”. See FAO, UNDP & UNEP. (2021). *A multi-billion-dollar opportunity – Repurposing agricultural support to transform food systems*.

BOX 14.

FUNDING PRIORITIES FOR SUPPORTING TERRITORIAL FOOD SYSTEMS AND MARKETS THROUGH DIGITAL ECONOMIES

- **Inclusively governed and publicly owned cellular data and internet infrastructure** in rural areas, optimized to enable improved communication access rather than data extraction and processing (including prohibitions on the locking of cell phones);
- **Digital literacy**, with a focus on the participation of women;
- **'Scaling out' pathways** for diverse, distributed and locally relevant 'wide tech' innovations (rather than 'scaling up' pathways for proprietary, hi-tech innovation);⁴³⁵
- **Farmer and citizen-led innovation** processes and zones such as makerspaces, 'Farm Hack groups'^{lxxi} and community-level collective construction workshops;
- The establishment of **digital information and marketing pathways without data surveillance**.

- **Supporting social infrastructure for inclusive governance**, for instance, community certification and Participatory Guarantee Schemes, and investments in collaborative market governance mechanisms that would enable food systems actors to collaborate on key issues such as the improvement of food safety in market settings.

Moving forward, further research is required to identify and quantify the highest impact investment areas.

WHERE TO FIND THE FUNDS

There are two complementary routes to rebalancing and extending financial flows:

1. Redirect existing funding sources

Global multilateral food and agriculture budgets, and climate mitigation funds, should be shifted away from corporate value chains and towards smaller-scale, locally-controlled, diverse food systems, especially those grounded in agroecology. States, in turn, should redirect commodity and export subsidies,^{lxxii} and other national and sub-national policy and programs, towards the priorities identified above.

2. New funding streams

Taxing corporations fairly, including windfall taxes, would generate bigger public revenue streams. Targeted junk food taxes, like soda or sugar taxes, have been introduced in some countries, sometimes ring-fenced for direction towards mitigating health impacts or bolstering healthy food.⁴³⁶ Additionally, both philanthropic food systems actors and financial actors are developing new funds and tools (e.g., community food bonds, loan stock for cooperative food enterprises, opportunities for investors to help de-risk infrastructure investment through loan guarantees) to support agroecology, food sovereignty, and other transformative food systems visions that are rooted to various degrees in territoriality.⁴³⁷

lxxi FarmHack is a worldwide community of farmers that build and modify their own tools. See their [website](#) and read about the movement's [history](#).

lxxii A pathway for shifting subsidies (approximately USD 720 billion producer subsidies are paid out annually, a remarkable share going to large sugar, tobacco, cotton, vegetable oil, and biofuel industries is laid out in IPES-Food & ETC Group. (2021). [A Long Food Movement: Transforming Food Systems by 2045](#).

BOX 15.

EXAMPLES OF PUBLIC SECTOR FINANCING FOR TERRITORIAL MARKETS

- **Barcelona, Spain** has 39 public food markets spread across the city, serving every neighbourhood. The city is the main funder, with some further resources from the market operators. In its 2020-2023 budget, the municipal government invested EUR 96 million in physical and digital infrastructure for its market system. 66% of city dwellers shop at the food markets.^{438,439}
- Agroecology in and around **Rosario, Argentina** has benefited from consistent financial and other forms of support from municipal, provincial, and national governments, supporting territorial food systems and markets. The national ProHuerta program fostered urban and peri-urban agriculture with seeds and other supports since the 1990s. In 2002, after the Argentine financial crisis, the city began its Urban Agriculture Program (PAU), providing vacant and flood-prone city land for agroecological cultivation, including new 'garden-parks', and resourcing municipal markets. Rosario also grants tax exemptions to landowners who permit low-income urban farmers to use vacant private land. Since 2011, the municipal/provincial Greenbelt program has championed an economically productive peri-urban agroecological corridor, ensuring land access, collective branding, and additional public markets supplied from the greenbelt.^{440,441}

LEVERAGE POINT 3. MAXIMIZE THE OPPORTUNITY OF PHYSICAL MARKETS AS CRITICAL NON-CORPORATE SPACES, BUILD PARTICIPATORY MARKET AND FOOD SYSTEM GOVERNANCE

Public/traditional markets are critical spaces that feed billions of people. Special attention is needed to bolster the specific identities and contributions of these markets, to safeguard against corporate encroachment and cooptation, and to enhance their orientation towards agroecological production. Although they are subject to varying ownership, governance, and degrees of integration with corporate chains, wholesale markets also represent a breeding ground for further inclusivity and collaboration as horizontal, multi-actor spaces that challenge vertical corporate domination of the food chain. With major infrastructure for moving fresh food, there are significant opportunities to increase connection between smallholders and local buyers through wholesale markets – bringing them closer to home, and reorienting them towards sustainability, equity, and resilience goals (with many 'food hubs' already embodying this orientation). There is also significant scope to strengthen participatory governance approaches in markets, and to maximize collaboration and connectivity throughout food webs.

This leverage point identifies measures related to legal and definitional frameworks, governance arrangements, and associated ways to strengthen collaboration and connection among and between producers, buyers, and consumers.

LEGAL AND DEFINITIONAL FRAMEWORKS

Key opportunities include the following:

- **Developing legal frameworks and clear definitions to protect the authenticity of farmers' markets and other specific markets/segments.** For example, in Italy a 2001 law enshrined criteria for farmers' markets and who could sell at them, and recognized the multifunctionality of agriculture – enabling farmers to diversify their activities, and helping to create the legal ecosystem within which farmers' markets and agritourism have flourished.^{442,443} In Portugal, 'family farming' is supported through clear definitions and new, dedicated funding.^{444,445} And in British Columbia, Canada, the BC Farmers' Markets society has established eligibility criteria that defines and protects 'local farmers'.⁴⁴⁶
- **Establishing dedicated spaces and differentiated markets for higher value markets (e.g., agroecological),** and supporting ways to ensure remunerative market outlets (including through Participatory Guarantee System approaches). For instance, Nadia Haat, in West Bengal, India is an organic market established next to a periodic market, with space provided by a local temple. To avoid contamination, farmers select adjacent fields for

organic production and take turns bringing produce to market. Consumers welcome the healthy, trusted produce which is priced comparably to the non-organic food available at the adjacent periodic market.⁴⁴⁷

STRENGTHENING COLLABORATION AND CONNECTION

Territorial food systems are built on and nurture cooperation and connectivity. Cooperative-based growing and marketing, networked markets, Participatory Guarantee Systems, and other myriad forms of producer-to-producer, producer-to-consumer, and consumer-to-consumer cooperation are particularly significant in terms of overcoming dispersion, achieving economies of (appropriate) scale, providing self-managed infrastructures (in lieu of often lacking state support), allowing producers to interact with – often large – buyers on fairer terms, and facilitating aggregation.

Key opportunities to enhance connectivity include:

- **Harnessing opportunities to connect producers to their nearest wholesale markets/food hubs**, and to use their infrastructures to host additional farmers' markets and other hybrids.
- Supporting grassroots-led social innovation, such as the formation and maintenance of **non-profit food hubs** that aggregate and supply publicly-funded and non-profit institutions with fresh, healthy, culturally-appropriate foods from the territory.^{lxxiii}
- Providing much greater support to **collective food production, distribution, and provisioning approaches** – from states, local governments, civil society, and communities.
- **Further using public markets as sites for solidarity-building and information exchange**,

supporting engagement and activism towards food system transformation.

IMPROVED GOVERNANCE

A very broad array of formal and informal governance arrangements oversee physical territorial markets, with varying implications for resilience. Physical public marketplaces can serve as fertile ground for new forms of inclusive governance, paving the way for effective and context-specific improvements to markets, for instance with regards to food safety and hygiene approaches. One-size-fits-all measures to address informality in physical markets can undermine resilience by failing to account for the multiple roles and cultural specificities of markets.^{lxxiv,448,449} To be transformative, **inclusive market-level governance must be accompanied by broader steps** to radically re-localize food system governance, resources, and economic activity – advancing the development of locally-controlled markets.⁴⁵⁰ Key opportunities include:

- **Supporting adequately funded local governance and management of physical territorial markets**, committed to democratically-run, safe, inclusive, spaces. States, local governments, civil society, and food system funders can all contribute to this.
- **Paying specific attention to the role of women, smallholders, and other distinct populations** and stakeholders in the governance of physical marketplaces, in order to realize safe, inclusive spaces through their leadership and participation. Indigenous and other communities may require autonomy and distinct spaces in the context of physical markets.
- **Developing food policy processes such as inclusive territorial and national food policy councils**, and participatory approaches such as **deliberative dialogues^{lxxv} and citizens juries** on key food

lxxiii For instance, see: LeBlanc, J. R., et al. (2014). *Building Resilience in Nonprofit Food Hubs*. Journal of Agriculture, Food Systems, and Community Development, 4(3), 121–135. A study of 50 metropolitan food hubs in the U.S. shows “80 percent of our Food Hubs offer at least some option of improving the convenience of accessing fresh, locally produced food through farmers’ markets, online sales, or community-supported agriculture (CSA)”. The same study shows how all hubs aggregate deliveries from various local farms and then distribute it either for-profit (supermarkets) or not-for-profit venues (schools, NGOs). See: Shariatmadary, H., et al. (2023). *Are Food Hubs Sustainable? An Analysis of Social and Environmental Objectives of U.S. Food Hubs*. Sustainability, vol.15:3, 2308.

lxxiv A One Health approach, meaning interdisciplinary and intersectoral collaboration that works to sustainably balance and optimise human, animal, and ecosystem health, is being trialled in Asia to manage risk in poultry from production to market, including wet markets. See One Health Poultry Hub. (2019). *COVID-19: Impact and options for strengthening poultry sector resilience and rebuilding consumer confidence*.

lxxv Rather than one-sided presentations or debates, deliberative dialogues allow different perspectives to make their case and then respond to audience questions, either in a single meeting or in a series of meetings. IPES-Food and ETC Group, 2021. *A long Food Movement: Transforming Food Systems by 2045*.

systems issues – strengthening the participation of farmers, food workers, social movements, Indigenous peoples, people with lived experience of food insecurity, and NGOs in food system governance.^{451,452} Broadening out dialogues beyond food systems to include intersections with public health, labour, and environmental issues would support the democratic identification of needs and priorities, and inform collective policy orientations.

- **Ensuring that more empowered local governments provide supportive frameworks for advancing food-related territoriality**, for example, in terms of providing sufficient policies, programs, and funding for urban and peri-urban agriculture to thrive (see Box 15). Territorial development policies can also be used as a vehicle for advancing 'territorial equity' within and between territories and their markets (different regions, urban, rural).⁴⁵³
- **States, local governments, civil society, and communities should work to establish and strengthen collective social resources** to build initiatives, community consensus and trust on ways forward, and to bring together food providers and purchasers.

LEVERAGE POINT 4. TURN STATE PURCHASING AND FOOD SECURITY POLICIES INTO TOOLS FOR RESILIENCE

As our analysis shows, territorial markets are how most of the world is fed, and these markets are a lifeline for smallholders and low-income populations. Territorial markets are clearly best adapted to serving the needs of the poorest. With more than 3 billion people unable to afford a healthy diet,⁴⁵⁴ urgent steps are needed to reinforce territorial markets.

Although producers, workers, and civil society actors are the lifeblood of territorial markets, the state has a critical role to play in helping these markets to flourish – a role that should be enhanced through more systematic use of a range of public policy

levers to prioritize food security, resilience, and multifunctionality. As seen in Section 3, the extent to which this involvement is geared towards supporting small-scale actors and short chains is a key determinant of whether or not territorial markets can thrive and deliver widespread, durable benefits. State market management policies (public procurement, marketing boards, etc.) remain critical and under-leveraged tools – in many cases representing a missed opportunity to support multifunctionality and resilience. It is no coincidence that most of the positive innovation and experimentation in support of territorial markets is taking place at sub-national levels, where a territorial logic can be more easily embedded across governance, and where the grip of industrial food system actors may be weaker.

State-level social protection policies are also critically required, to address rising poverty and food insecurity, and ensure that people have access to these markets. Further, there is huge scope to link public food security/anti-hunger/anti-poverty programs to territorial markets. This represents a low-cost, high-impact pathway to address poverty and food security, and build food system resilience.

SOCIAL PROTECTION

- **Robust social protection tools are needed to underpin the realisation of the right to food.** These include health and childcare, unemployment insurance, disability benefits, tax breaks, unconditional cash transfers, and mandated liveable minimum wages. While beyond the scope of this paper, universal anti-poverty measures provide the foundation for enhanced access to food for all, including via territorial markets, which are well-suited to meeting the needs of the poorest.
- **Market-level food access initiatives** developed by local actors (e.g., local government, producer/buyer groups, civil society) should be supported and mainstreamed, in a way that complements social safety nets. See Box 17 for examples.

BOX 16.

EXAMPLES OF TERRITORIAL MARKET INITIATIVES TO INCREASE ACCESS TO FOOD

- Urban Tilth in **Richmond, California**, brings together an agroecological school, community gardens, urban farms, and local small farmers, sustaining two CSA programs. Paid Farm to Table baskets supply 200 families, while free, charitably-financed Food for All baskets go to a further 200 families. This CSA is part of the “Seed Power, Grow Justice” program, a multifunctional community development initiative with explicit food justice and sovereignty goals.⁴⁵⁵
- Social innovation at public markets: as mentioned above, vouchers, healthy food prescriptions, and differentially priced food are increasing affordability, paid for by governments, charities and consumer solidarity, especially in **North America** where farmers’ markets have been associated with privilege. Examples include the Maine Farmshare for seniors programs, the coupon scheme at British Columbia’s farmers’ markets, the Supplemental Nutrition Assistance Program (SNAP) and Double Up Food Bucks at farmers’ markets in the US, and social prescribing of fruit and vegetables in the UK, Canada, and the United States.^{lxxvi,456,457}

BOX 17.

PUBLIC PROCUREMENT, STATE PURCHASING, AND INTERNATIONAL TRADE AGREEMENTS

The CSIPM has noted some governments’ caution about using public procurement to support small-scale production, concerned that this may be in contravention of the WTO’s Government Procurement Agreement (GPA).⁴⁵⁸ Yet, it has been noted that this is a misperception, as the agreement contains built-in flexibility to include approaches that advance sustainable development and the right to food, providing protection to public procurement favouring small-scale producers.⁴⁵⁹ As well, with regards to both the GPA and other free trade agreements, smaller procurement contracts are generally below set thresholds.

However, there continues to be division at the WTO between developing countries seeking to lift limitations on government’s domestic procurement and purchasing of food in the interests of food security, and developed countries.

Trade-related measures which would undermine the inclusion of small-scale production in public procurement and purchasing are consistently opposed by civil society groups working to protect food sovereignty and the right to food.^{460,461}

lxxvi A 2023 World Map of Social Prescribing includes case studies from 24 countries, although not all of them include food prescriptions. Khan, H., Giurca, B.C. et al. (2023). *Social Prescribing Around the World A World Map of Global Developments in Social Prescribing Across Different Health System Contexts*. National Academy for Social Prescribing, WHO & Global Social Prescribing Alliance.

USING PUBLIC PROCUREMENT, STATE PURCHASING, AND SUPPLY MANAGEMENT TOOLS FOR FOOD SECURITY

- **Public procurement for institutions.** Prioritize and mandate local/regional procurement for and by government institutions anchored in small-scale sustainable food production – in combination with upstream supports and adequate infrastructure to ensure consistent supply – to help advance territorial markets. This would also deliver many other benefits, including increased market stability for producers, strengthened rural economic development, environmental and biodiversity protection, increased access to healthy and fresh food, and decreased food waste.^{462,463,464}

A specific equity-based focus on small-farmers and marginalized groups, and on agroecology, such as in Brazil, would further advance the positive benefits of territorial food procurement, helping to achieve the Sustainable Development Goals. Procurement by institutions would also encourage leaning in to other dimensions of place-based food systems, including food production on lands they own, through food systems education, and via investment in territorial supply chains.

- **State purchasing, supply management, marketing boards, and public stockholding.** Reorient supply management, food security stockholding, and marketing boards to prioritize purchasing from small-scale producers, and to ensure that prices cover the costs of production – providing fair remuneration throughout the food web.⁴⁶⁵ This can be facilitated by legislation. For instance, Spain's interpretation of the EU Unfair Trading Practice (UTP) directive ensures by law that each link of the food chain cannot sell to the next link below cost, starting with producers.⁴⁶⁶ This is a promising area that requires further research to flesh out the most high-impact approaches.

PREPAREDNESS FOR SHOCKS AND CRISES

In times of crisis, it is important for states and communities to be able to **act at national and local levels to ensure that food security is placed above other commercial or policy considerations.**

This can be done, for instance, through the development of emergency protocols such as 'Emergency Food Security Laws' that can protect and promote territorial systems and markets, taking steps such as suspending trade and intellectual property protocols; cracking down on corporate concentration and land grabbing; evaluating the impact of new technologies; and promoting agroecology. It is key to ensure that crisis-response initiatives are inclusively designed in the public interest, with the involvement of civil society, rather than, for instance, an agenda where food sovereignty is used as a pretext for further militarization.⁴⁶⁷

In parallel, grounded in lessons learned from the pandemic response and to be ready to mobilize in the face of future crises, states, local governments, civil society, and food system funders should **support movements to develop skills and methodologies to be able to react to 'predictable surprises'** in ways that will support small-scale agroecological food providers and territorial food systems.^{lxxvii} Building bridges between food movements and other social movements is also critical for future preparedness.

INTEGRATED TERRITORIAL FOOD SYSTEMS POLICIES

There are **untapped opportunities for states to bring together social protection, health, environmental and economic development, fair labour, food security, food sovereignty, and racial and social justice goals through integrated territorial food systems policies.** For example, a number of North American cities have food plans that incorporate territorial markets into a suite of policies for territorial food systems. The city of Seattle has a Food Action Plan developed through extensive community engagement, with particular attention given to the participation of marginalized constituencies. The Plan combines a number of initiatives, including public health-related restrictions on corporations (soda tax), support for food security and nutrition ("Fresh bucks"), Farm to School programs, and urban farming (the P-Patch program).⁴⁶⁸

lxxvii Purchase for Progress (P4P) programme, WFP – which itself has pledged to source 10% of its food purchases from smallholder farmers – encourages national governments and the private sector to buy food in ways that benefit smallholders. See WFP. [Purchase for Progress](#).

LEVERAGE POINT 5. CURB THE ABILITY OF CORPORATIONS TO SHAPE FOOD SYSTEMS AND DIETS

Corporate power in food systems is clearly a huge source of inequity and a threat to food system resilience. Steps to rein in corporate concentration and break up harmful monopolies along the food chain are therefore urgent, and momentum is growing globally. Further, there is a growing backlash against ultra-processed foods, which are spreading hand in hand with unchecked corporate influence. Steps to rein in corporate power would reverberate through food systems, with indirect but important effects on territorial markets.

Key opportunities include the following:

- **Leveraging antitrust/competition policy.** Scrutinize mergers and break up monopolies through robust application of antitrust/competition policies (supported by enhanced participation of civil society working together across jurisdictions).
- **Applying conflict of interest rules.** Address conflicts of interest in food system governance and adopt a robust UN-wide corporate accountability framework. (For more detail, see the recent IPES report, *Tipping the Scales*).⁴⁶⁹
- **Curbing ultra-processed foods.** Build public awareness campaigns on the perils of ultra-processed foods, while enhancing efforts to revalue territorial markets as a cornerstone of healthy, affordable foods and dietary diversity, and as a buffer against ultra-processed foods (especially in countries being targeted for their expansion).
- **Building out producer-led and territorially-rooted e-retail.** Harness the opportunities of genuinely producer-led and territorially-rooted e-retail – while guarding against the risks of corporate capture/loss of autonomy, and pushing back against a top-down digitalization agenda for food systems.

- **Flagging and fighting co-optation.** Regulation and verification are needed on where specifically value-branded (e.g., ‘local’, ‘family farmer’) food comes from, its authenticity, and the actors involved in getting the food to market – particularly in corporate and mixed retail settings.⁴⁷⁰ In non-corporate markets, community guarantee systems are important mechanisms to support.

- **Building policy space into trade and investment agreements.** At the global level it will be necessary for bilateral, international, and multilateral trade and investment agreements to ensure policy space for states to support diverse territorial food systems and markets. Building in the participation of small-scale food producers, workers and vendors, researchers, and civil society in shaping and implementing related regulation is key.

It is also important to recognize and take advantage of flexibilities which are available under current rules to support territorial markets and their stakeholders.^{lxviii} Additionally, governments have generally been robust in protecting food stockholding and price support programs from trade interference, and should be encouraged to continue to stand up to foreign and corporate encroachment.⁴⁷¹ Further, the instrumentalization of ‘resilience’ to maintain industrial agriculture subsidies and expand trade liberalization requires ongoing vigilance and countering.

Finally, growing calls are being made for rethinking agricultural trade – and the role of the WTO in it – more profoundly.⁴⁷² Re-orienting international trade negotiations around fundamental questions of principle, for example, envisioning a trade agenda with the right to food at its core, focusing on territorial markets, and negotiating new types of treaties (e.g., “International Food Agreements”) are potentially transformative paths forward.⁴⁷³

lxviii For example, although larger scale domestic procurement is included in some WTO and FTA liberalization provisions, contracts with local producers will usually be small enough to be unaffected. Similarly, most government infrastructure provision for territorial markets would not run afoul of WTO rules. Supports which directly impact on prices are more tightly controlled, although even here exemptions for low income or resource poor producers offer flexibility.



CONCLUSION

We have seen that **a diverse web of closer-to-home supply chains and markets is feeding most of the world, reaching low-income populations, sustaining the livelihoods of farmers and communities, nurturing biodiversity – and providing a lifeline to millions of producers and consumers in times of crisis.** Crucially, closer-to-home chains are bringing food to market at prices that are accessible to low-income groups *and* remunerative for producers, i.e., the fair prices that corporate chains have systematically failed to deliver.

And yet, we have also seen that their ability to continue to play these roles into the future is under perpetual strain. Corporate chains have few solutions to offer, yet they are gradually displacing and/or assimilating other modes of provisioning. This is happening in a context of deteriorating food and nutritional security, the rise of diet-related disease, sustained food price inflation, and supply shocks – where people need healthy, diverse, and accessible food provisioning options more than ever.

To meet the needs of today and be more prepared for the inevitable crises on the horizon, **it is critical that diverse resilience-building food systems, supply chains, and markets be better understood and recognized for the many benefits they deliver.** These markets can weather shocks and deliver resilience because they are rooted in communities, landscapes, and cultures, and because they empower diverse networks of people to deliver food sovereignty and food security.

Going forward, we have everything to gain by advancing the leverage points outlined above in support of territorial markets. Providing appropriate support for these systems would allow them to deliver further benefits for food security, equity, and ecological health – reinforcing their role as the cornerstone of food security and climate resilience for years to come.

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ABOUT IPES-FOOD

The International Panel of Experts on Sustainable Food Systems (IPES-Food) is a global think tank and expert group guiding action for sustainable food systems around the world. Bringing together 25 groundbreaking thinkers and practitioners from diverse fields and world regions, we conduct research, provide policy recommendations, and advocate for sustainable, equitable, and healthy food systems worldwide. Rooted in science, and grounded in the realities of those on the front lines of hunger and climate crises, IPES-Food has since 2015 been a leading voice advancing policy solutions and bringing together alliances to address the most pressing questions for food and farming. The panel is co-chaired by Olivier De Schutter, UN Special Rapporteur on extreme poverty and human rights, and Lim Li Ching, Senior Researcher at Third World Network.



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