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WHITE PAPER

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on short food supply
chains with a focus on
the Czech Republic

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On-Farm: Farming, Food Production and Food Processing with Added Value for Local
Small and Medium-Sized Farms

Short Food Supply Chains as Opportunity for Small and Family Farms?

Currently, large food supply chains manage the largest part of food sales. However, alternative systems of food production and distribution focus on locally produced and sold food that has gotten great attention in the last two decades, the short food supply chains (SFSCs). SFSCs do not have a single definition. Short supply chains are defined by the number of actors implied in the food chain rather than food miles. One definition given by the European Commission is “A supply chain involving a limited number of economic operators, committed to cooperation, local economic development, and close geographical and social relations between producers, processors and consumers”. The oldest system is still represented by local or proximity markets, but other means are also used such as direct sales stores, on-farm sales, consumer cooperatives, home deliveries, online sales. Platforms or websites are today the main response of the agricultural sector and food industries, generally of local nature and with artisanal productions, to bring their offer closer to consumers.

The challenges of those new systems represent tough market competitions, high distribution and logistics costs, small shipment sizes and so forth. Hence, the SFSCs requires corresponding solutions in food distribution that are aligned with the contemporary logistics trends, sustainability and aspects of the new digital era. Moreover, small and medium-sized farms depend on value creation on their farm and cannot benefit from economies of scale to the same extent as large farms.

The aim, its purpose and structure of the white paper

A white paper is a report and guide that informs readers concisely about short food supply chains as a complex issue and presents the On Farm’s philosophy on the matter. It combines expert knowledge and research into a document that argues for specific solutions or recommendations. The white paper allows the reader to understand the issue, to solve a problem and to make a decision.

The main objectives of this white paper are to analyze the actual situation of short food supply chains and farm-to-fork production strategies in agriculture in the partner countries. A particular focus is on

ONFARM “Farming, food production and food processing with added value for local small and medium-sized farmers” is an Erasmus+ project that aims to train farmers with skills and competences to start on-farm production processes, reach wider customer audience and create added value to their products. The project wants to support the development of short food supply chains and bring forward the European Farm to Fork Strategy, presented by the European Commission in 2020 as part of the EU Green Deal.

The project (2021-2023) is coordinated by the Association of Private farming of Czech Republic (ASZ) and implemented together with five partners: The European Council of Young Farmers (CEJA) based in Belgium, Confederazione Italiana Agricoltori Toscana (CIA) from Italy, Institut für Ländliche Strukturforschung from Germany (IfLS), On Projects Advising (OnP) from Spain, and Stichting Slow Food Youth Network (SFYN) from the Netherlands. In addition to this white paper, the partnership will develop case studies, a series of podcasts, and online training materials. These materials will be presented to farmers and relevant stakeholder in a series of events at European and national level. You can find all materials and further information at www.onfarm.eu

the respective legislation, government regulations and government support for producers. The document will inform about current challenges and needs to support on-farm processing and farm-to-fork strategies in Europe. The primary target groups are farmers and agricultural food producers. In addition, the white paper also informs the broader public, relevant stakeholders and policy makers.

The white paper is structured as follows: First, relevant EU policies are introduced like the EU Green Deal, Farm-to-Fork Strategy and Common Agricultural Policy and the importance and relevance of these EU policies discussed. This is followed by the country-specific chapter on the establishment and situation of short food supply chains and their local regulations. Then, considerations regarding the implementation of Short Food Supply Chains as well as supporting activities for this will be shown/discussed. Finally, a conclusion and outlook on the further ONFARM project results/outcomes are given.

EU Strategies for Short Food Supply Chains

The EU agricultural sector

In Europe there were 10.5 million farms in 2016. The vast majority of these (95.2 %) are classified as family farms. According to COPA COGECA the average size of a farm is 16 ha in Europe. The agricultural land cover represents 48 % of EU territory and family farms represent 67 % of these. A professional family farm is considered between 5 to 250 ha. Half of the economic resources generated by farms in Europe come from crops, 40 % from livestock and the rest from secondary activities. Farm productivity is constantly increasing (+109.5 % from 2005 to 2017). The value produced by farms in 2017 is € 427 billion, making Europe the world's largest agricultural power. Agricultural imports and exports alone account for 1/3 of the EU's trade with the world.

The agricultural sector is facing a series of problems. Firstly, a demographic crisis with only 5.6 % of young farmers (under 35 years old) against 31 % over 65 years old. In addition, serious environmental challenges are affecting the sector and farmers need to adapt to climate change.

Short food supply chains, small & family farms and alternative food networks in the EU

There is an increasing role of the alternatives food network to respond to the market demand. However, even if it is a growing system it remains marginal. On average, about 15 % of EU farms sell more than half of their production directly to consumers. However, these are mainly small farms, with only 3 % of the farms above 100 ESU selling more than half of their production directly to consumers (Short food supply chains and local food systems in the EU briefing of the Parliamentary Research Service). There is also great difference depending on the country. It is important to stress that short supply chain is not only present in rural area. Alternative food networks are also taking place in urban area with urban food production. Initiatives such as community gardens or rooftop production are also considered as short supply chain for urban area. The short supply chains are responding to the need of consumers to reconnect with their food. Food coming from these alternative systems is considered fresher, healthier, and more sustainable. Nevertheless, these common beliefs need to be taken with caution, as there is an academic debate to state what model is the most sustainable. Sustainability is context-specific and short supply chains can be the most sustainable system in some cases.

What are the current European policies in agriculture and how do they support short food supply chains, small & family farms and alternative food networks?

There is no policy, which specifically supports short supply chains. The policy, which shapes the rules of food production, is the Common Agricultural Policy (CAP). However, some measures of the CAP are considered discriminatory to small farmers and family farms, especially the hectare-based payments that supports the largest farmers. Nevertheless, with the new CAP (2023/2027) and the Farm to Fork Strategy, it seems like the Commission is trying to provide a toolbox that every farmer can benefit from. The Farm to Fork Strategy is the first attempt of the European Commission to look at the production at the food chain level (for more details check the zoom-in box below). Within this new CAP there are clear objectives in the regulation to strengthen small farmers production and short supply chains. To make direct payments fairer, the Commission has adopted redistribution schemes from large to small farmers. With the National Strategic Plans, currently under assessment, the Commission provides tools that State Members should use to meet the specific needs of their farmers.

On top of the direct payments, there are other concrete measures, which aim to support small and local markets under the second pillar of the CAP.

1. **Advisory services:** to support farmers in developing short supply chains;
2. **Operational groups:** to allow the sharing of good practices. One group has been dedicated to short supply chain at EU level, but there is the possibility to develop them at national, regional, local level;
3. Possibility for farmers to enter **quality schemes:** to support to farmers with their administrative procedure to access quality chains (e.g., label of origin);
4. **Support to cooperation:** this measure facilitates horizontal and vertical cooperation among supply chain actors and local markets;
5. **Investment funds:** via the second pillar there are targeted funds for farmers to transform the products on farm and sell at the local level. It is on farm transformation subvention.

Zoom-in: How the Farm to Fork Strategy can support short food supply chains and alternative food networks?

In the European Commission's Communication (May 2020) "A **Farm to Fork Strategy** for a fair, healthy and environmentally-friendly food system", at the heart of the European Green Deal, the European Commission mentions the need to enhance the resilience of local food systems and create shorter food supply chains.

By end of December 2023, the European Commission will present to the European Parliament and to the European Council 'The future framework law on sustainable food systems' - the horizontal initiative of the Farm to Fork. The aim of this new framework is to allow all the actors of the food chain to come together and contribute to the food system in a sustainable way, considering the social, economic, and environmental aspect of sustainability. The Commission aims to strengthen the local initiatives and have more of a bottom-up approach. The European Commission is exploring the possibility to strengthen **new mechanisms of food governance** at European, national, and local level. At the local level, they can take the shape of food councils gathering all actors of the food systems (including farmers, consumers), working together towards more sustainable food systems.

Moreover, the European Commission is revising the **procurement criteria for sourcing food in public spaces**, introducing more sustainable criteria. The legislative framework stemming from the Farm to Fork Strategy will incentivize sustainable public procurement and indirectly sourcing of food from short food supply. For the moment, these measures are voluntary but making them mandatory would strengthen short supply chains without distorting the common market. It is now up to the Member States to implement these measures.

Short Food Supply Chains in the Czech Republic

According to the research conducted in 2021 by the Nielsen Atmosphere, for approximately three-quarters of Czech citizens buying food in supermarkets is the most preferable way of buying food. Buying food in supermarkets is more preferred by the population living in bigger cities than in the countryside and the most important factor for deciding where to get groceries is the nearness of the shop (Nielsen Atmosphere 2021). Nevertheless, also one-third of the research's respondents declared that they were regularly buying food in the farmer's market and these respondents lived more often in the bigger cities than in the countryside (Nielsen Atmosphere 2021). Similar consumer behaviour showed results of a research conducted by the Public Opinion Research Centre in 2021 according to which nearly one-half of respondents declared buying food in a farmer's market on a regular or occasional basis (CVVM 2021b). But only 3 % of the respondents declared buying food directly from the farmers regularly and 30 % of the respondents were buying the groceries from the farmers irregularly (CVVM 2021b).

On the other, nearly one-half of the respondents grew food in their garden, and also 46 % of the respondents without the possibility to grow their food receive some groceries from their relatives (CVVM 2021a). Self-supply with food is more common in Czechia than in other west European countries (Štifová 2021). Also, the median income of a household in Czechia was in the year 2020 lower than the median income in almost every country of the "old" member states of the EU (Eurostat 2022). According to Hruška et al. (2020), the facts of lower-income and common self-supply are the main reasons, why buying food directly from the consumers isn't as widespread as in Western Europe. According to the interviewed agricultural advisor in general higher demand for the products from farms is in the area near bigger cities and areas with a higher concentration of tourism, while especially in the borderland people are less willing to buy the food from farms.

The attitude of customers corresponds with the attitude of Czech farmers – for example in the Moravian-Salesian region in the year 2018 only 5 % of the organic farms from the region don't sell their products directly to the consumers (Hruška et al. 2020). However, the interviewed researcher mentioned that, in general, the on-farm sale on a rise since 2008, when legislation changed in favour of the on-farm sale. But the researcher also stated, that in the Czech Republic there isn't any official statistical evidence of the distribution of the on-farm sale and food finalization between Czech farmers.

On the other hand, according to the interviewed agricultural advisor, the consumers of on-farm products aren't always those with higher income, but sometimes the lower income customers are motivated to buy the usually more expensive farm products by the quality and also environmental impacts of the products. Also during the covid-19 pandemic, people began more buying food directly from the producers than before the covid-19 (Duží 2022). Covid pandemic also encouraged the interviewed farmer to create a farm shop on his farm, because the lockdowns caused a significant drop in the sale of their products from restaurants.

On average, Czech households spent 20 percent of their expenses on food and non-alcoholic beverages in the year 2020 (CZSO 2021). Thus the market with food and beverages has a significant role in the Czech economy, but in 2019 agriculture contributed to the total GDP of Czechia by less than 3 % (FAO 2021). According to the US Department of Agriculture (2021) in 2020, less than 10 percent of every dollar spent on food was made by the farmer's profit. One of the possibilities for farmers to increase her or their profit is to sell the farm's products directly to the consumer (US Department of Agriculture 2017) and with that become part of a short food supply chain. Increasing the profit would help with the

farmer's situation, whose average income didn't reach 50 % of the general average income in the EU 28 (Matthews 2021). The interviewed farmer saw the opportunity of the on-farm sale not only in the increasing his profit, but he saw on-farm sale also as a marketing instrument. According to the farmer, the customers of the farm shop gave the farm feedback, which was used by the farmer's family to improve the farm's offer.

Because of the above-mentioned factors, on-farm sale in Czechia doesn't have so strong a position, as in Western Europe. In my point of view improving the on-farm sale in our country would help if buying food from the farm would become more convenient, for example through increasing food prices in supermarkets. Also, the on-farm sale would help to increase marketing and advisory support from the state.

Support for Short Food Supply Chains in the Czech Republic

As mentioned in the paper above, the short food supply chain isn't well developed in Czechia. This is also because of quite strict legal regulations of the on-farm sale. Food processing and sale of processed food is regulated by Act no. 166/1999 Coll. (veterinary care) and Regulation no. 298/2007. According to these regulations, the products sold on farms have to be healthy and for the on-farm sale of small amounts of products, the farmers don't need special permission from the state. The importance of these legislative regulations for the on-farm sale was also mentioned by the interviewed agricultural advisor.

Table 1: Forms of support for Short Food Supply Chains in Czechia

Organization	Scale level	Basic description
State Agricultural Intervention Fund (SZIF)	European	Support for non-agricultural activities of the farmers including food processing, direct farm sale or agrotourism. This support is provided by the Rural Development Program 2014-2020
State Agricultural Intervention Fund (SZIF)	National	Special national subsidy program for food processing (No. 13).
Subsidiary and Guarantee Farm and Forestry Fund (PGRLF)	National	Support for commercial financial services for farmers, including loans for investments on farms
Districts of Czechia	Regional	In some districts there are special subsidy programs for small farmers. These finances can be used for agro-environmental measures but also for food processing and on farm sale
Local Action Groups (MAS)	Regional/local	Some of the LAG provide financial support for local food processing on farms

Source: SZIF (2022) and PGRLF (2022)

For improving the competitiveness of Czech farms and agricultural enterprises quite a few measures are supporting the on-farm processing and on-farm sale on a national, regional, and local level (Table 1). The main organization administering agricultural subsidies in Czechia is the State Agricultural Intervention Fund (SZIF), which administers European and national agricultural subsidies. Some of these subsidies can be used for food processing on farms and agricultural enterprises and therefore for shortening the food supply chain. The interview farmer stated that he thought about using a subsidy from the Rural Development Program to build a farm shop on the farm of his family, but because the specific conditions of the program weren't in favour of his business, the family finally decided not to use the support. The praxis of this type of support was also criticized by the interviewed agricultural advisor.

In the opinion of the interviewed agricultural advisor, the support for the on-farm sale in the Czech Republic at the national level should be extended and more money should be allocated for this purpose.

Besides the SZIF subsidies for on-farm sale and on-farm food processing is provided by local governments of districts and Local Action Groups (LAGs). For example, the Liberec district provides from 2022 program for funding farmers up to 150 hectares and through this program, it's also possible to use the money for facilities for food processing or on-farm sale (Liberecký Kraj 2022). The interviewed researcher emphasizes the role of LAGs in the support of the on-farm sale because on this scale have the administrators of support from the LAGs are more capable to know the needs of actors of local development.

Without a change in the legislation, it's quite complicated for Czech farmers to avoid the challenges in the case of on-farm sales. But in general, the best way to successfully process and sell their products directly to the consumers is their strong will. As was mentioned in the previous text, the willingness of Czech consumers to buy food directly from the producers is slowly increasing and, in many cases, demand for on-farm sold products exceeds the offer. Therefore, support instruments (Table 1) are mainly used to support the food processing itself and not the marketing of the products.

Although the Ministry of Agriculture of the Czech Republic organizes a lot of different seminars for farmers, in April 2022 none of these was oriented on the on-farm sale (MZe 2022). The seminars were mainly focused on the subsidies for an area or agro-environmental programs. Thus, the advisory support for farmers focused on the on-farm sale came more from agricultural NGOs like Agricultural Chamber (Agrární komora 2022), Agricultural Association of the Czech Republic (Zemědělský svaz ČR 2022) or the Association of the Private Farming of the Czech Republic (ASZ ČR 2022). All of these three Czech agricultural NGOs provide their members with webinars, seminars, or other advisory support, which is sometimes focused also on the on-farm sale.

The OnFarm expert interview on the implementation of Short Food Supply Chains

OnFarm: *"How can farmers proceed [from the legal frameworks like the Farm to Fork strategies] implementing Short Food Supply Chains?"*

Patrick Burgess: *"There is no general framework for this, and it depends largely on the situation, for example, farmer size, resources, time, market opportunity. The concept of "short food supply chain" also plays an important role: are we trying to create a more face-to-face construct with a direct interaction between a producer and consumer, or an extended situation where we try to provide embedded information about the origin, like a labelling scheme?"*

To proceed in a strategy, I would say two things are needed, first is a self-assessment of the company's/farms capabilities, products and service offerings. And a decision on what amount of products should be sold in the short food supply chain format.

Afterwards, a framework might be beneficial to the farmer, in seeing the steps to converting, and this could be generalised, or specific to the self-assessment. The framework should also include decision tools on which market to access at a local level and be specific to the supply chain structure that the producer would like to go for.

In addition to the two steps, a network might be formulated to support the transition. This would be a network of stakeholders, let's say both industry partners, other farmers and intermediary companies that are involved directly in the supply chain, and also technical or knowledge partners ranging from banks to universities. Lastly, it depends on the farmer. There has to be a drive for change, and if it is not there, regardless of motive, it will be difficult. "

Caio Dorigon: *"Farmers need support from the government to open new short food supply chains and to build a closer relationship with consumers. They need capacity building and incentives on these matters. Chefs could be a bridge to promote their products and consumers need to be educated about the importance of local consumption and the valorization of local products."*

Valentino Affinita: *"Farms should adopt an agroecological approach, through a transition that transforms the role of agriculture in society. Moving from industrial agriculture to an agroecological approach implies the effort to reform the food system as a whole: it means discouraging production based on monocultures and supporting family farming that reduces external inputs, respects seasonality, regenerates the soil, respects social rights and addresses the local market. This goal is achieved in the first place by moving public funds - for example those of the CAP - from the agro-industrial system to small and medium-scale production and by implementing forms of multifunctionality, both of an economic and social nature, in particular in urban and peri-urban contexts. For this, the goodwill of individual farmers is not enough, but a systemic process is needed that includes the training, support and empowerment of small farmers and young people who choose to undertake this work."*

OnFarm: *"What are supporting activities and the role of regional collaborations or alternative food networks?"*

Patrick Burgess: *"I think the examples given are very critical, as long as the networks are diverse in the supply chain, the network should consist also of potential market partners to increase sales at a local and regional level. There is also a role of the government to provide funding and initial support to the network in the start-up phase. You may also see that many of the short food supply chains are becoming less about face-to-face, so online digital platforms are increasingly popular, and this might be important for the success of these initiatives. There should also be a trust mechanism, whether this is a label or a technology, it is important to support trust in the farmer."*

Caio Dorigon: *"Capacity building to local producers and consumers about alternative food networks, as well as giving support to the local producers to individuate new local consumption channels and on how to open them. It's also important to educate consumers and promote the local products, their importance, how they can be used at home and so on."*

Vallentino Affinita: *“In an increasingly urbanized context in which food systems are unable to sustainably meet the growing demand for food in cities, it has become necessary to direct food and agricultural models towards a new paradigm. The role of public administrations is an important key to foster virtuous dynamics: from school canteens to hospital canteens, from local markets to food poverty support programs, from the fight against waste to the allocation of public land to young farmers, local authorities they can give a direction of sustainability to the production and distribution of food. Relocalization of food systems must be a priority for administrations at all levels, starting with those closest to the territory. Local authorities must equip themselves from today to face the influx of new mouths to feed and must do so with a sustainable food policy, which connects the city with its countryside and its farmers. An operation that must be built starting from the territory with its specific characteristics, in which very different combinations can be found between natural cycles and anthropic activities.*

For this reason, it is necessary to implement actions aimed at strengthening and supporting the small and medium-sized enterprises that populate the primary sector along all the steps of the supply chain, from production to marketing, up to the post-consumer phases. To ensure a healthy diet and access to quality food for all citizens, while taking care, at the same time, of the protection of natural resources, it is in fact necessary to support and enhance the good practices of the food supply chains, having in mind to strengthen the economic and social links with rural areas close to the metropolis. Young people looking for an outlet in agriculture must be guaranteed a whole series of additional support tools: technical advice, easier access to the means of production, training in agroecology.

From this point of view, it is necessary to innovate training in agriculture, a fundamental tool for expanding the number of people who can contribute to turnover in the sector. To technical teaching, it becomes urgent to approach paths marked by a non-sectoral but systemic approach. Not just future farmers need training in agroecology. Those who work in the media system or in national and local institutions should have access to dedicated paths, to update their knowledge and use their skills at the service of ecological transition. It is extremely important that these key sectors of the social body fully understand the causes and consequences of the ecological crisis, in order to activate information flows aimed at the general public or regulatory projects capable of reversing the trend.”

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Patrick Burgess, is a lecturer on Food Supply Chain Management and Logistics at the Aeres University of Applied Sciences in Almere, The Netherlands.

Caio Dorigon is the coordinator of the Latin America and the Caribbean network and project manager at Slow Food International in Bra, Italy.

Conclusion

The agricultural sector but especially small and family farms are under pressure. Market forces and environmental challenges on the one hand and changing social expectations towards the agricultural sector bring short food supply chains into the center of sustainable food production and consumption. This development is supported by a wide range of strategies and funding schemes. However, on the national level more communication and collaboration among ministries is needed, and a uniform approach is desirable. Likewise, better overall experience sharing and networking can be helpful. Better statistical coverage is also important, especially for better planning in consulting practice (Krauch 2022).

Nevertheless, farmers are in a unique situation with an increasing number of funding opportunities, changing consumer habits and the internet provides access to information and inspiration. The first step for a farmer is a thorough analysis of the farm's potential role in a short food supply chain. The second step is to develop a realistic farm and business concept. Using the existing support structures and online information materials can be helpful to develop an innovative approach. The third step is the implementation of the new approach. The goal of short food supply chains is to make food production more resilient. This benefits the farmer as well as customers and contributes to the sustainability of the farming sector.

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