



Department
for Environment,
Food & Rural Affairs

Policy paper

Government food strategy

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Presented to Parliament by the Secretary of State for Environment, Food and Rural Affairs by Command of Her Majesty.

Foreword

The coronavirus (COVID-19) pandemic and current turbulence caused by the invasion of Ukraine are reminders of the crucial importance of UK food producers to our national resilience. During the first lockdown, the food supply chain responded to an unprecedented 50% surge in demand during an episode of panic buying, and they did not let us down. At every stage of the food system, from farming to manufacturing, distribution and retail, key workers in the food industry showed extraordinary commitment and ingenuity, delivering an incredible logistical feat.

International food security comes from a combination of dispersed food production around the globe and open markets. In the UK, international trade has always been an important dimension of our food security, however, successful domestic production is what gives us national resilience in an uncertain world. Those countries that are entirely dependent on imports for their food supplies tend to be characterised by less choice and higher prices.

The UK is largely self-sufficient in wheat, most meats, eggs, and some sectors of vegetable production. Sectors like soft fruit have seen a trend towards greater self-sufficiency in recent years with an extended UK season displacing imports. Overall, for the foods that we can produce in the UK, we produce around 75% of what we consume. That has been broadly stable for the past 20 years and in this food strategy we commit to keep it at broadly the same level in future.

With the cost of agricultural commodities linked to global gas prices, we recognise concerns about the cost of food. Through this strategy, we are setting out long-term measures to support a food system that offers access to healthy and sustainable food for all. It will complement the measures we have already taken to support those struggling to afford food and help them eat healthily – through the Healthy Start Scheme, breakfast clubs, and the Holiday Activities and Food Programme.

The food industry also has a central role to play in the government's levelling up agenda. It is present in every part of our country. It is the largest manufacturing sector in the UK, bigger than automotive and aerospace combined. It invests in local communities. Charitable foundations formed by industrialists like Cadbury, Rowntree and Weston, have made huge contributions to communities including to encourage healthy eating.

Today, food manufacturers provide employment opportunities in areas where there might otherwise be deprivation; they offer apprenticeships and opportunity; they invest in research and development, and they give local areas a sense of pride and identity. None of our food manufacturers could succeed without the farmers and fishermen who supply them with high quality produce.

There are new challenges to address that will require the characteristic ingenuity of our food industry. As Henry Dimbleby's Independent Review highlighted, poor diet has led to a growing problem of obesity, particularly among children. The human appetite evolved before the era of calorie-dense processed foods, and excess calorie intake is one of the drivers of obesity.

Good progress has been made on reformulation in some categories such as soft drinks, crisps, and some breakfasts cereals. Industry-backed initiatives like "Veg Power", which conceived the successful "Eat Them To Defeat Them" campaign, have shown the value of positive advertising to promote vegetable consumption among children. However, there is more that must be done in future with government and industry working in partnership on a shared endeavour to promote healthier diets.

The farming and food system also has a significant impact on the environment. Our future agriculture policy will seek to financially reward sustainable farming practices, make space for nature within the farmed landscape, and help farmers reduce their costs. From precision breeding techniques that reduce the need for pesticides, to tractors fuelled by methane captured from slurry stores, and new feed additives that can significantly reduce methane emissions from ruminants, technological solutions are developing at pace. Our future farming policy will support innovative solutions to the environmental challenges we face.

Rt Hon George Eustice MP

Secretary of State for Environment, Food and Rural Affairs

Executive summary

Introduction

1) The food and drink industry has an important role to play in the government's levelling up agenda. It is the UK's largest manufacturing industry, bigger than the aerospace and automotive industries combined. UK agri-food and seafood sectors create over £120 billion of value for the economy every year and employ over 4 million people. Working with government, they underpin our food security: demonstrating great resilience when dealing with disruption at national and international levels, particularly in the context of the COVID-19 pandemic and most recently through the conflict in Ukraine.

2) The agri-food sector is in every region of the nation, creating wealth and employment. Whether it's Scotch Whisky, the Cumberland sausage, Fenland Celery, Worcestershire sauce, the Melton Mowbray Pork Pie, Yorkshire Forced Rhubarb, countless cheeses, or Cornish Clotted Cream, every part of Britain has its local specialities and recipes which contribute to local identity and pride in place. Throughout history, the food and drink industry has invested in people and communities up and down the country.

3) In 2018, the UK government asked Henry Dimbleby, the co-founder of restaurant chain Leon and a non-executive director of Defra, to carry out a comprehensive review of our food system – 'the independent review.' He was asked to design recommendations so that our food system: "Delivers safe, healthy, affordable food; regardless of where (people) live or how much they earn" and "restores and enhances the natural environment for the next generation in this country." The scope focused on England but making consideration of our relationship with the devolved administrations (DAs), the European Union (EU) and other trading partners. The independent review was a powerful analysis of the challenges facing the food system, centred on two diagnoses – described as the 'Junk Food Cycle' and the 'Invisibility of Nature'. You can read the analysis and recommendations in detail in the [National food strategy for England](https://www.gov.uk/government/publications/national-food-strategy-for-england) (<https://www.gov.uk/government/publications/national-food-strategy-for-england>).

4) This strategy responds to the review, and includes policy initiatives to boost health, sustainability, accessibility of diets and to secure food supply, ensuring that domestic producers and the wider food and drink industry contributes to the levelling up agenda and makes the most of post-Brexit opportunities.

5) The strategy comes at a time of significant increases in food prices, largely because of energy prices and exacerbated by events in Ukraine, which is very challenging for people across the country. We are engaging closely with the food industry to understand price impacts and any mitigating measures, including through our Food Industry Resilience Forum and UK Agricultural Market Monitoring Group. We are also working closely with third sector organisations to understand challenges related to food access.

6) We know the cost of food has real consequences for people across the country. The broader affordability of food, and individuals' access to food, is a key element of the government's approach to tackling poverty as we learn to live with recent events and manage the impact of cost-of-living pressures. The Chancellor announced a £15 billion cost of living support package on 26 May 2022, including taking £400 off household energy bills and providing a £650 cost of living payment to the most vulnerable households; this was in addition to the previously announced £22 billion support (in total the package is now £37 billion). Other measures to help those in most need include: the reduction in the Universal Credit taper rate, raising the threshold for National Insurance, cutting fuel duty, and providing locally administered support to help with household essentials. The government is committed to a sustainable, long-term approach to tackling poverty and supporting people on lower incomes, helping them to enter and progress in work and lead fulfilled lives.

7) This food strategy focuses on longer-term measures to support a resilient, healthier, and more sustainable food system that is affordable to all. It is complementary to wider government work on cost of living, setting out measures which will ease supply chain bottlenecks and improve efficiency, therefore reducing pressures on the cost of food; it includes measures to support good quality jobs around the country; and it also sets out how we will continue to support children and families on low incomes to learn and eat healthily through various initiatives such as the Healthy Start Scheme, free school meals, breakfast clubs and the Holiday Activities and Food Programme (HAF). Whilst we strive to transform the food system in the long-term and unlock the benefits of healthier and more sustainable diets, we will, at all phases of policy development, champion consumer interests and seek to minimise food prices impacts.

8) This strategy will help ensure we deliver on this government's ambition for a prosperous agri-food sector, and that healthier and more sustainable diets can be achieved by all. It is not a comprehensive summary of

everything that government is doing to improve our food system, or the actions being taken by industry and other key actors. It instead articulates some of the key priorities for action within our food system; new opportunities available to us following Brexit; and opportunities to support levelling up.

9) Our objectives for this strategy are to deliver:

- a prosperous agri-food and seafood sector that ensures a secure food supply in an unpredictable world and contributes to the levelling up agenda through good quality jobs around the country
- a sustainable, nature positive, affordable food system that provides choice and access to high quality products that support healthier and home-grown diets for all
- trade that provides export opportunities and consumer choice through imports, without compromising our regulatory standards for food, whether produced domestically or imported

10) To achieve these objectives we will seek to:

- broadly maintain the current level of food we produce domestically, including sustainably boosting production in sectors where there are post-Brexit opportunities including horticulture and seafood
- ensure that by 2030, pay, employment and productivity, as well as completion of high-quality skills training will have risen in the agri-food industry in every area of the UK, to support our production and levelling up objectives
- halve childhood obesity by 2030, reducing the healthy life expectancy (HLE) gap between local areas where it is highest and lowest by 2030, adding 5 years to HLE by 2035 and reducing the proportion of the population living with diet-related illnesses; and to support this, increasing the proportion of healthier food sold
- reduce greenhouse gas (GHG) emissions and the environmental impacts of the food system, in line with our net zero commitments and biodiversity targets and preparing for the risks from a changing climate
- contribute to our export strategy goal to reach £1 trillion of exports annually by 2030 and supporting more UK food and drink businesses, particularly small and medium sized enterprises (SMEs), to take advantage of new market access and free trade agreements (FTAs) post-Brexit
- maintain high standards for food consumed in the UK, wherever it is produced

11) We will publish a report to monitor progress against the food strategy goals, listed in paragraph 10, alongside the next UK Food Security report and will continue to do so regularly at a frequency that allows trends to emerge, and dovetails with other relevant publications. This will draw on independent analysis from the Climate Change Committee (CCC), Food Standards Agency (FSA) and the Office for Environment Protection (OEP).

12) As with Henry Dimbleby's independent review, the scope of this strategy is for England, as food policy is devolved. The themes broadly overlap but we have gone further in places, for example, on levelling up and labour.

13) Defra is responsible for food policy. However, the policy levers that influence the food system are dispersed across government. To implement this strategy, we will:

- join-up within government to collectively drive progress
- work closely with the DAs, reflecting that the food system operates on a UK-wide basis
- champion a collaborative approach by working in partnership with industry and civil society

14) Our assessment is that we have existing powers in primary legislation to implement the measures in this strategy. However, we will seek primary or secondary legislation as required to achieve our objectives. Before doing so, we will consult fully on all policy changes in the usual way.

Summary of key measures

15) The key new measures and proposals in this strategy to deliver against our objectives are below.

16) Objective 1: To deliver a prosperous agri-food and seafood sector that ensures a secure food supply in an unpredictable world and contributes to the levelling up agenda through good quality jobs around the country.

- The continued production of healthier, high quality, tasty food and drink domestically remains of vital importance for our economy and food security. We will support farmers to broadly maintain levels of domestic

production through productivity gain and our new farming schemes. We will enable growth in key sectors, including horticulture and seafood, making the most of post-Brexit opportunities.

- Innovation will be a key component to sustainably boost production and profitability across the supply chain. We have committed to spend over £270 million through our Farming Innovation Programme and are supporting £120 million investment in research across the food system in partnership with UK Research and Innovation (UKRI) in addition to other funding packages. We will also develop a joint vision with industry for agri-food innovation, identifying shared priority areas for investment and coordination. Through funding and improving our regulatory frameworks post-Brexit we will support progress on a wide range of issues, including alternative proteins and gene editing, and we will launch a Call for Evidence of the use of feed additives to reduce methane emissions from livestock. We will also work with the agricultural sector to develop a What Works Centre to provide farmers with evidence that supports the adoption and on-farm take up of new innovations.
- It is essential that there is a sufficient, qualified, and well-paid workforce to support every food and drink business, dispersed around the whole country. To address near term need, the government will release the additional provision of 10,000 visas under the Seasonal Worker Visa Route, including 2,000 for the poultry sector. This means that in total 40,000 visas will be made available for seasonal workers in 2022, providing labour for food businesses across the UK. We will also work with industry to support the upcoming Migration Advisory Committee (MAC) review of the Shortage Occupation List. In addition, we will commission an independent review to assess and ensure the quantity and quality of the food sector workforce. The review will encompass the roles of automation, domestic employment and migration routes.
- Ensuring our agri-food industry workforce has the necessary skills to take advantage of new and emerging innovations will help drive greater efficiency and production. We will work with industry to review existing skills programmes, identify improvements, and tackle barriers that currently prevent uptake. This should help to drive up completion of skills training, pay and productivity in all areas of the UK to support levelling up.

17) Objective 2: To deliver a sustainable, nature positive, affordable food system that provides choice and access to high quality products that support healthier and home-grown diets for all.

- Our food system must not only feed our nation today but also protect it for tomorrow. We will use the Agriculture Act (2020), Fisheries Act (2020) and Environment Act (2021) as frameworks to incentivise farmers and food producers to adopt more sustainable practices.

- We will publish a land use framework in 2023 to ensure we meet our net zero and biodiversity targets, and help our farmers adapt to a changing climate, whilst continuing to produce high quality, affordable produce that supports a healthier diet.
- We will undertake a programme of randomised control trials to develop a suite of evidence based and value for money interventions to encourage and enable healthier and more sustainable diets. The findings will enable government to channel resources towards the most effective interventions as we work towards developing largescale and long-term policies to shift diets.
- As announced in the Levelling Up white paper, we want to spark a school food revolution. We will introduce a suite of measures to improve school food and build a strong food curriculum, including up to £5 million to deliver a school cooking revolution and a new pilot for local authorities to assure school compliance with school food standards. This will support every child leaving secondary school to achieve a healthier lifestyle and paves the way for a future generation to work in our food system.
- The strategy launches our Food Data Transparency Partnership. This provides a unique opportunity to leverage the collective energy and enthusiasm found across the food system and drive a real transformation in health, animal welfare and environmental outcomes through our food. We will consult on implementing mandatory public reporting against a set of health metrics and explore a similar approach to sustainability and animal welfare. We will also provide consumers with the information they need to make more sustainable, ethical, and healthier food choices and incentivise industry to produce healthier and more ethical and sustainable food. The partnership will ensure we have a robust framework for tackling some of the fundamental questions for our food system, raising transparency and responsibility.
- We will consult on Government Buying Standards for Food and Catering Services (GBSF). This consultation will include whether to widen the scope of GBSF mandatory organisations to cover the whole public sector and introducing an aspirational target that at least 50% of food spend must be on food produced locally or certified to higher environmental production standards, while maintaining value for money for taxpayers.

18) Objective 3: To deliver export opportunities and consumer choice through imports, without compromising our regulatory standards for food, whether produced domestically or imported.

Trade strengthens food security and enables the whole country to have access to food and drink that would be impossible or impractical to produce domestically. We will harness the benefits of new FTAs, made possible following Brexit, whilst maintaining our world-leading domestic standards by using a range of levers within our

bespoke trade agreements. We will shortly publish a statement on our independent animal health and production regime which will inform our negotiations. We will ensure British businesses are well placed to take advantage of the growing export opportunities available to them through these deals, including by placing agri-food attachés at our embassies in major trading partner countries. We will also continue to work internationally to create a more resilient, environmentally friendly and healthier global food system.

1. Food security and sustainable production

1.1. Ensuring security and sustainability of food supply in an unpredictable world

1.1.1 In December 2021, the government published the UK Food Security report, the first comprehensive review of the UK's food security to be published since the UK Food Security Assessment (UKFSA) in 2009. The report found that we have a high degree of food security in the UK. Domestically we produce 60% by value of all the food we need, rising to 74% of food which we can grow or rear in the UK. We produce more lamb and liquid milk than we consume and, in recent years, our production in sectors like poultry and soft fruit has increased. This strong domestic production, balanced with international trade, contributes to a diverse and resilient UK food supply.

1.1.2. Self-sufficiency is not the same as food security. Being part of a global food system provides us with a diversity of supply sources and access to new products that cannot be produced domestically, contributing to our food security. However, exposure to international markets, in combination with global supply chain pressures and shocks, can also create price and supply impacts, such as those arising from the conflict in Ukraine. Over the last 2 years, our primary producers and the wider food and drink sector have shown remarkable resilience, working in partnership with government to maintain food supply despite global disruption and huge challenges to all elements of the supply chain during the COVID-19 pandemic.

1.1.3. To further build the UK's resilience to future crises and shocks, we continue to monitor and strengthen the resilience of our supply chains and support our domestic production. Following Russia's invasion of Ukraine, the government has set out measures to help farmers and food producers manage increased input costs, including a package on fertilisers. Going forward, we will engage with industry to understand and address barriers to uptake of risk management or other farming insurance products, recognising that effective business planning is a key enabler of resilience at the individual farm level. This will reduce volatility and help to maintain confidence levels among farmers. We have also helped businesses to manage vegetable oil substitution and access more diverse supply chains where there are shortages of ingredients. We will work with industry to develop plans to bolster resilience of critical inputs such as carbon dioxide (CO₂) and fertiliser. This will include a specific long-term plan on CO₂ in 2022 and a focus on pioneering more organic-based fertilisers, to ensure continued certainty and availability for all inputs which underpin our food production.

1.1.4. As well as strengthening the resilience of domestic supply chains, we will continue to work with international partners to support worldwide action to mitigate the impacts of food crises on the most vulnerable countries and people. Russia's invasion of Ukraine has escalated the global food security crisis, by pushing up wheat, maize and fertiliser prices. We produce 88% of the wheat that we need domestically, with the rest coming predominantly from Canada. However, we are working with like-minded countries around the world to ensure that we keep trade flowing and keep food prices down. And we are providing significant support to mitigate the impact of food prices on the countries and people most at risk through multilateral organisations. We are also working to increase global food security in the long term through increasing the sustainability and resilience of agriculture and other areas of the food system.

1.2. Driving more sustainable food production

1.2.1. The conflict in Ukraine has shown us that domestic food production is a vital contributor to national resilience and food security. Domestic food production can reduce the offshoring of food production to countries that do not meet our high environmental and animal welfare standards. It will also play a critical role in meeting government's carbon budgets and environmental targets, delivered through farmers and land managers. Through the net zero strategy, we are committed to reducing agricultural greenhouse gas emissions and mitigating climate change. Furthermore, Brexit has provided a once in a generation opportunity to reform our

farming policies so that we focus support on sustainable food production. Our Agriculture and Fisheries Acts do this by providing frameworks for the sustainable production of food, where within England we are maintaining funding available for farmers across this parliament but reforming it away from unfair and ineffective Direct Payments, to targeted offers to support farmers in building more resilient, sustainable, and diversified farm businesses. One of our key vehicles for this is the Sustainable Farming Incentive which will incentivise farmers to improve soil quality, invest in hedgerows, encourage optimal use of fertiliser and pesticides, and support regenerative practices such as agroforestry. Other schemes are designed to support farmers to reduce input costs, boost yields and increase profitability, and together will support our ambitious environment targets including to:

- halt species decline in England by 2030
- treble woodland creation rates by the end of this Parliament
- restore 280,000 hectares of peatland in England by 2050
- protect 30% of our land and sea by 2030
- improve soil health
- reduce climate emissions by at least 6Mt CO₂ equivalent per annum by 2035

1.2.2. The independent review refers to a “three compartment model” for land use change, reflecting the need for a combination of intensification, land sharing and land sparing to deliver government objectives and feed a growing population. There are 9.2 million hectares of farmland in England but there is no direct correlation between the UK land area farmed and agricultural output. We have some of the best performing farms in the world, with 57% of agricultural output coming from just 33% of the farmed land area. It follows from this that it is possible to target land-use change at the least productive land, to increase the environmental benefit from farming and to increase yields with minimal impact on food production.

1.2.3. Therefore, our aim is that farmers will broadly maintain domestic production at current levels as we deliver our climate and environmental goals. We are confident that our plans for the future of farming and the farm budget – as set out in the Agricultural Transition Plan, which focuses on support for productivity improvement, sustainable farming and land-use change – are consistent with this outcome. Our resilient food supply will therefore rely on a competitive and productive domestic sector, including increased output in sectors with sustainable growth opportunities such as horticulture and seafood, alongside continued, and in some cases

increasing, imports from a diverse range of countries. Our Environmental Land Management (ELM) offers will remain responsive to farmer demand through co-design whilst ensuring we remain on track to achieve our objectives for Net Zero, biodiversity, and animal health and welfare. In 2023, we will publish a land use framework that will reflect all our objectives for English Agriculture, the environment and net zero. It will also reflect and respond to the work of the House of Lords special inquiry committee into land use in England. This framework will inform incentives we build into our agri-environment schemes and should be a valuable resource for responsible authorities as they prepare their Local Nature Recovery Strategies.

1.2.4. To ensure the farming that underpins our resilient food production is sustainable, and maintains output, we plan to spend over £270 million across our farming innovation programmes to 2029 and have bolstered funding for farmers to invest in new equipment where there is scope to boost their productivity. This will also help farmers to identify and develop low carbon farming practices and carbon storage opportunities. Farmers and growers should be at the heart of innovation, with research driven by demand to boost production and profitability and reduce environmental harms. The Agriculture and Horticulture Development Board (AHDB) will play an important role in developing a What Works Centre to share best practice across the industry, which was recommended by Henry Dimbleby to improve the quality of advice on the practical implications for agriculture of goals such as net zero. This will be complemented by the new Institute for Agriculture and Horticulture (TIAH), due to launch in 2023, which will help farmers and growers to access the right skills to run professional, sustainable, and profitable businesses.

1.2.5. Another part of supporting a thriving farming sector is to ensure that the animals and crops we keep and grow are healthy and well-cared for, which also benefits the health and welfare of our own population. Our Animal Health and Welfare pathway will involve government funded vet visits and advice to farmers about measures to improve the health and welfare of their animals, with one of its objectives being to control endemic disease in farmed animals. We have already reduced consumption of antibiotics in animals by over 50% since 2014. The pathway will continue this progressive reduction in use of antibiotics.

1.2.6. As the custodians of our natural environment and important contributors to our food security, farmers must be treated fairly. We have introduced powers to regulate commercial relationships between producers and processors where necessary and to prevent unfair trading practices; and consulted on contractual practice in the UK dairy sector. Subsequent regulations will build sustainable commercial relationships across the dairy supply chain that reflect an equitable share of risk between producers and processors. We will shortly consult on the need for similar action in the pig sector and have already begun engagement to identify key issues in the pork

supply chain. Any interventions will be designed to ensure farm businesses can engage in smart business planning and risk management, supporting a competitive and resilient sector that delivers benefits for producers, consumers, and taxpayers.

1.2.7. To support continued high-quality British food and drink production, we are committed to helping consumers better understand where the food they buy comes from and its production impacts. The Food Data Transparency Partnership outlined in section 2.3 will support this, along with improved procurement practice to encourage the use of locally produced food. We will continue to monitor the food supply to demand ratio through the UK Food Security Report which will be published at least once every three years. Furthermore, our new trade policy will harness opportunities to import and export food and drink in a way that does not undermine our aim that our farmers can broadly maintain domestic production, whilst allowing us to unlock the benefits and opportunities of a global food system, which domestic consumers and the most innovative and productive domestic food producers can benefit from.

1.3. Levelling up the food system by maximising growth opportunities

1.3.1. The UK agri-food and seafood sectors employ over 4 million people all over the country, making an important contribution to the government's vision to level up the UK. Government will work with these sectors to spread economic growth across the country in line with our levelling up missions on pay and productivity. We will do this by supporting new industries and boosting production in sectors where there are growth opportunities, recognising the advantages this can bring to less prosperous areas. Brexit also provides opportunities for these sectors which we outline in a later section.

1.3.2. Commercial horticulture uses a new generation of sustainable and efficient greenhouses and provides new opportunities to make UK producers more competitive. Growth in this sector would: boost home-grown fruit and vegetable production, help to future-proof the sector in a warming climate, and create new skilled job opportunities across the country. The UK currently produces only 23% of the cucumbers and 15% of the tomatoes supplied domestically. But with the right tools, vibrant, growing sectors like these can expand significantly. This could be achieved through an increase in industrial horticulture, which encompasses highly productive, high tech, controlled environment growing operations including multi-acre glasshouses and vertical

farms. To create a positive investment environment for the sector, we will include industrial horticulture alongside other manufacturing sectors in decisions on industrial energy policy and review the planning permission process to support new developments. We will also incentivise the sector to make use of surplus heat and CO2 from industrial processes, and renewable sources of energy. Our skilled worker visa route will allow skilled professionals from overseas to bring their expertise to the UK in developing this sector.

1.3.3. The government has already announced the expansion of the Seasonal Worker Visa Route to 2024. Taking advantage of this, we will work with growers to develop a world leading horticulture strategy for England. This will examine the diverse roles of small, large, and emerging growing models, and drive high tech, controlled environment horticulture to increase domestic production. We see an essential and increasing role for automation in horticulture and across the agri-food chain and will support growers through our Farming Innovation Programme. We will also lead and publish the government response to the automation in horticulture review that was co-chaired by Professor Simon Pearson.

1.3.4. The alternative protein sector provides another opportunity for growth, complementing traditional livestock sectors. The UK has been at the forefront of innovation in protein sources since the development of Quorn products in the 1980s, with a world-leading production facility in Billingham creating jobs and investment in North-East England. The government will keep the UK at the front of this growing and innovative sector by supporting alternative protein research and innovation, including as part of our partnership with UK Research and Innovation (UKRI) to invest over £120 million in research across the food system. British grown beans and pulses are another great example of low carbon sustainable proteins that contribute to healthy diets, contribute substantially to farming objectives; and are recognised as valuable break crops in arable cropping.

1.3.5. Sustainable sources of protein do not have to be new or novel or displace traditional sectors. Regenerative farming will also provide a more sustainable production of traditional protein sources. Using livestock to benefit the environment in balance with food production is already being championed by many small-scale farmers. Our Farming Futures research and development (R&D) Fund (part of our Farming Innovation Programme) will help the livestock and protein sectors embrace 'climate-smart farming' and innovative technologies. To support this, we will launch a Call for Evidence to better understand the challenges associated with the use of feed additives and materials that can reduce methane emissions from livestock. This will explore how we can work with farmers and agri-businesses to increase adoption of this technology to support more sustainable protein production. There are also proteins from non-traditional livestock sectors.

1.3.6. Seafood is another potentially lower-carbon and healthy source of protein which can grow sustainably to fulfil its potential within the food sector. We are investing £24 million to support seafood science and innovation as part of the £100 million UK Seafood Fund. This will include funding projects that develop innovation and technology in the seafood space. Innovations in aquaculture will also help us boost production in the seafood sector without adding to pressure on fish stocks. The Fund also includes at least £65 million for an infrastructure scheme, investing in ports, and aquaculture and processing facilities for the seafood industry, to help support coastal communities.

1.3.7 The seafood sector is an essential source of employment and part of the community in the Humber and has an important role to play in levelling-up. Grimsby is England's leading fish processing hub, accounting for around a third of all UK seafood processing jobs. It has a rich heritage in producing and processing high quality seafood that the nation loves, including Traditional Grimsby Smoked Fish. The Seafood Grimsby and Humber Alliance represents the region's seafood and trading processing cluster, which is composed of around 70 companies with more than 5,500 employees and that together support a further 10,000 jobs along the value chain. The Grimsby Cluster, working closely with government, will play an important role in ensuring the sector can take advantage of new trade deals, adapt to climate change, and increase uptake of skills training to ensure the cluster has the right people to continue to provide quality seafood to the UK and beyond.

1.4. Levelling up the food system through skills and innovation

1.4.1. Government will unlock the potential of the food and drink sector by boosting completion of high-quality skills training and driving investment and innovation throughout the supply chain. Food manufacturing is our biggest manufacturing sector with a business in every part of the UK. The sector provides employment opportunities and drives regional economic growth in areas such as the East Midlands and the East of England where we continue to see investment in food innovation from businesses of all sizes. As part of our levelling up missions on employment and skills, government will continue to work with the food manufacturing sector as well as other parts of the food chain to spread opportunities across the country and move towards a high wage, high skill economy.

1.4.2. Agri-food businesses currently face a range of workforce challenges despite the variety of roles and career pathways available. The government has already reformed our approach to skills and worked closely with industry to launch several schemes to provide high quality training and encourage new entrants into the workforce, including the introduction of T-levels. We will now work with industry to ensure that our offer is clear and coherent, to identify gaps and understand barriers to uptake, particularly amongst small and medium sized enterprises (SMEs). We will increase the focus on skills with respect to the food sector, including boosting their representation on expert skills groups and helping them articulate where there are gaps in existing provision and new skills requirements, including green skills. Local skills improvement plans will ensure that training provision is more responsive to employers' needs within a local area. This should drive improvements in pay and productivity in all regions of the UK as well as boosting completion of high-quality skills training in line with our levelling up missions.

1.4.3. Despite these initiatives and the great strides industry is making to adapt to the new points-based immigration system, we saw in 2021 how this essential supply chain continues to be heavily reliant on seasonal migrant labour. Under the Seasonal Worker Visa Route, 30,000 visas were initially made available in 2022 for seasonal workers in horticulture, with provision for an extra 10,000 if there was evidence of need. To address near term need, those extra 10,000 visas will be made available to businesses. Noting the particular shortage of seasonal workers in the turkey processing industry, the government will extend 2,000 visas from the newly released 10,000 visas for the Seasonal Worker Visa Route to include poultry, building on the success of our approach in 2021. This is in addition to several poultry, and wider agri-food roles already being eligible under the Skilled Worker route since December 2020. We will work with industry to articulate key food industry shortages to inform the Migration Advisory Committee (MAC) upcoming review of the Shortage Occupation List. Recognising that the sector cannot sustainably rely on migrant labour, especially in light of global pressures elsewhere, the government will also in the coming weeks commission an independent review to tackle labour shortages in the food supply chain. This will consider the roles of automation, domestic labour, and migration in the labour market, the last of these with reference to the wider work by the MAC, to ensure UK businesses can access the labour they require.

1.4.4. In late 2021, we introduced various temporary visa schemes to address acute shortages of pig butchers, poultry workers and HGV drivers. Work coordinated by the Cabinet Office and led by Sir Dave Lewis last year on supply chains across the whole economy recognised that the food and drink industry has shown remarkable resilience. However, it concluded that there are particular vulnerabilities, including an overreliance on

transporting food by trucks. We will work with industry to increase use of other transport options where possible to reduce reliance on HGV drivers and improve food security.

1.4.5. We have set out above the funding for innovation in farming and agriculture. As well as looking at innovative ways to improve our supply chains, we want to promote innovative practices and technologies across the entire agri-food sector, working with industry on research and innovation in support of net zero across agriculture, soils and peat, waste, and land use. Partnering with research councils, universities and industry can unlock greater investment in innovation. We will work with UKRI, industry and consumer groups to develop joint priority areas for funding, including regional priorities, and proposals to access this, for example on industry automation and alternative proteins. We are also working with UKRI to maximise the reach of industry-led collaborative R&D to SMEs across the UK. This will drive development and uptake of innovation across the entire agri-food chain.

1.4.6. To ensure food manufacturers have access to government support for innovation, we will work with industry to drive greater confidence, uptake and investment in new technologies. We will build on existing work with geographically diverse academic institutions and innovation providers to connect industry with innovation expertise, show-case companies leading the way in adoption of new technologies, and host R&D collaborations. This will allow companies to work together with researchers to solve common problems and ensure new technologies work for the sector.

1.4.7. We recognise that SMEs often require more tailored support to take up new innovations and growth opportunities. We will continue to offer specialised regional support and engagement with food and drink SMEs, building on the success of the Regional Food and Drink Summit earlier this year.

1.5. Reducing barriers and bureaucracy following Brexit

1.5.1. Following our departure from the EU, we will review our rules and regulations to ensure they are proportionate and based on the best available science, enabling quick and effective deployment of new technologies at the highest consumer standards. We will drive innovation in genetic technologies step-by-step. We have already acted by removing burdens from field trials and, through the Genetic Technology (Precision

Breeding) Bill, we will create a new simpler regulatory regime to allow researchers and breeders to unlock the benefits of technologies such as gene editing. We will also work with the FSA to develop dedicated guidance materials for approval of new alternative protein products while reviewing our novel food regulations. This will ensure they are transparent for innovators and investors, whilst maintaining world-leading consumer safety standards. Reforming EU regulations on wine will also allow us to support our businesses, whilst we will make things easier for consumers by reviewing regulations around low and no alcohol products.

1.5.2. Furthermore, we will remove any bureaucracy that stems from old EU rules and currently holds back our agri-food and fishing industries. We are working closely with farmers and growers to ensure regulation is outcome-focused, proportionate, and clear, whilst encouraging greater responsibility across the agri-food supply chain. Examples here include on-farm and remote interventions to deliver improved water quality and livestock traceability. Where regulations are in place, we will ensure these are consistently and proportionately enforced to protect a level playing field for farmers who do the right thing and take pride in the quality of their local environment.

1.5.3. We are taking the opportunity to move away from the rigid EU framework of 'standard' check levels. Instead, border checks will be used only when necessary to protect our biosecurity. We are reviewing legislation to enable a more flexible and dynamic approach to our border that is targeted according to risk. Going beyond the digitisation of current requirements, we will make the best use of data and technology to reduce the burden on businesses and improve the flow of goods.

1.6. Reducing waste in the food system

1.6.1. Waste is harmful for the environment, bad for business, and damaging for society. The UK is an international leader on tackling food waste, and we are fully committed to meeting the UN Sustainable Development Goal to halve global food waste by 2030. We are therefore consulting on improved food waste reporting for large food businesses. To help consumers, we are continuing to work with the Waste and Resources Action Programme (WRAP) to help households waste less food. On top of this, the Environment Act introduces a requirement for all local authorities in England to arrange for the separate collection of food waste for recycling or composting. Our net zero strategy announced £295 million of capital funding which will allow

local authorities in England to prepare to implement free weekly separate food waste collections for all households from 2025. We will also tackle other forms of waste in the food system through Extended Producer Responsibility for packaging, which will hold food producers to account for the packaging they produce. The Deposit Return Scheme will deter littering of in-scope containers and improve recycling, helping to restore pride in our local communities as we level up the country.

2. Healthier and sustainable eating

2.1. Trends in diet and obesity

2.1.1. The independent review highlighted the growing problem of obesity in the UK. Over the past four decades, the proportion of adults in England living with obesity has increased significantly. Latest data shows that around 64% of adults and 40% of children in England are overweight or living with obesity, which has been compounded by the pandemic.

2.1.2. The drivers of people eating more calories than their bodies need, causing excess weight gain, are numerous and complex. On average adults are consuming 200-300 more calories each day than needed. In children who are overweight or living with obesity, daily excess calories can be as high as 500, depending on age and gender. Excess weight and poor diet are drivers of other health conditions including cardiovascular disease, diabetes, 13 types of cancer and muscular conditions, and taken together cost the NHS £6.1 billion every year.

2.1.3 The independent review points to what Henry Dimbleby termed “the Junk Food Cycle” as a key driver. It argues that human diets evolved to consume natural foods, but the advent of calorie-dense foods means that there has been a tendency to consume more without satisfying the appetite in the same way. This leads to excess calorie intake. The independent review also argued such foods were then more responsive to marketing

and promotion and that industry was therefore commercially compelled to place more emphasis on promoting them.

2.1.4. Eating habits have and continue to change. Portion size in some categories has grown, and indications are that households are spending less on ingredients for home cooking and more on processed foods which require little preparation and can be high in fat, salt and sugar. We also do not eat enough seafood - a healthy and potentially sustainable source of protein, vitamins and minerals; oily fish is also rich in long chain omega-3 fatty acids.

2.1.5. Over consumption of calories can be seen across all income groups. However, we know that obesity and dietary-related ill-health is more pronounced in the most deprived groups. Today, 69% of those in the most deprived groups are overweight or obese and many are eating insufficient fruit and vegetables, fibre and oily fish. The disparity in the prevalence of people who are overweight or living with obesity between ethnic groups starts at a young age. There are also regional differences in obesity trends, which need to change.

2.1.6. The link between deprivation and dietary outcomes is not only about the cost of healthier food. It is also about having the equipment, cooking skills, and time to prepare and cook healthier food than more convenient alternatives, which can be high in fat, salt and sugar, and may not be as readily available to those on low incomes. In section 2.2, we explore measures that seek to reduce these barriers, many of which may be compounded by the stress and pressures associated with poverty that makes it harder to prioritise health. During COVID-19, there has also been an exponential growth in the takeaway sector, with online aggregators and delivery companies providing easier access for all population demographics to typically more calorie-dense food. This has been driven by more people using takeaways.

2.1.7. Overall, choosing the healthier option is often much more challenging, with the range of healthier choices often declining the poorer you are with additional barriers such as convenience and access hindering those on lower incomes from consuming a healthier diet.

2.1.8. The government's voluntary sugar reduction programme set an ambition for all sectors in the food industry to voluntarily reduce sugar by 20% by 2020 in the food categories that contribute most to the intakes of children aged up to 18 years. To date, this has resulted in mixed progress by category, business, and sector, though retailers and manufacturers have reduced the amount of sugar in breakfast cereals and yoghurts by around 13%. At the other end of the spectrum, government intervention can cause unintended consequences. A drive to

reduce portion size of chocolate bars has led to an increase in the sale and promotion of “multi-packs”. We must ensure that we learn from previous models, such as the responsibility deal, to create the right incentives for change. This includes a role for government in creating a level playing field through regulation. Some progress has been made. For example, in response to sharp rises in soft drink consumption, the government introduced the Soft Drinks Industry Levy. This fiscal incentive has been hugely successful, with industry reducing the total amount of sugar in the drinks within the Levy’s scope by around 44%.

2.1.9. There is a shared responsibility to identify the solution to obesity; industry has a role to play through its responsibility for promoting and supplying healthier foods, government has a role in making targeted regulatory interventions to support change, and individual consumers, empowered with better information about healthier choices, can stimulate demand for healthier foods. Creating a healthier food environment could mean encouraging reformulation to reduce calories, reducing portion sizes, innovating and investing in new technologies, and coupling any changes with individuals making healthier lifestyle choices. In any case, government needs to set the right expectations of industry, provide the right regulatory interventions, and support the necessary innovation to drive a healthier food environment.

2.1.10. There is also a role for government to address health inequalities more generally, and government and industry must work together to better enable individuals to make healthier choices. This is a major focus of the government’s levelling up agenda. The Department for Health and Social Care (DHSC)’s forthcoming health disparities white paper will also set out further measures to reduce obesity by setting out our approach to working with the food industry to create a healthier food environment for all and investing in innovative approaches to address weight and diet related ill health.

2.1.11. Nutrition and sustainability are interrelated – we should not tackle either in isolation. The measures we now set out are aimed at supporting better informed food choices with the dual objective of shifting consumers towards healthier and more sustainable choices and prompting a supply response from the food industry, where food production and consumption become healthier and more sustainable.

2.2. Encouraging healthier and more sustainable dietary choices

2.2.1. The independent review highlighted that ultra-processed foods could be an important contributor to over consumption of higher calorie foods. However, to determine their exact role in driving obesity, further research is needed. A new £11 million UKRI-BBSRC (Biotechnology and Biological Sciences Research Council) initiative, the Diet & Health Open Innovation Research Club, will help address this gap. It will support new research across businesses and academics to drive improvements in understanding the relationship between food and health, how we can improve the nutritional value of the food we eat and explore what underpins food choices.

2.2.2. Over the next three years, we will undertake a programme of randomised control trials of interventions in the food system to encourage and enable healthier and more sustainable diets for all. This programme will build a suite of evidence based and value for money interventions that can be developed into largescale and long-term policy. The findings will enable government to channel resources towards the most effective interventions. As announced in the levelling up white paper, we will invest in enabling primary care to undertake a pilot programme to improve diets through the Community Eatwell programme. This will build on the growth of social prescribing within primary care networks, the additional roles available via the Additional Roles Reimbursement Scheme and consider the role of those staff in primary care who have completed the Healthy Weight Coaches training. Further details will be published in the health disparities white paper.

2.2.3. Local Food Partnerships have already brought together councils and partners from the public sector, voluntary and community groups, and businesses to reduce diet-related ill health and inequality, while supporting a prosperous local food economy. We will learn from their approaches and work to understand and identify best practice in addressing food affordability and accessibility to healthy food. As part of our levelling up mission to narrow the gap in healthy life expectancy, government will identify the areas most in need of this insight, and Defra will work with local authorities and food charities in these priority areas.

2.2.4. It is important that individuals build a better understanding of their food choices from a young age as early childhood experiences have far-reaching implications for later in life. There are already several initiatives in schools which promote and provide children with high quality, nutritious, tasty food and drink. We want to help schools take this further and spark a school food revolution. As recently announced in our levelling up white paper, we will promote a 'whole school' approach to food, with governors, teachers and caterers committed and empowered to work together towards a healthier food culture. School leaders and governors will be required to publish a school food vision on their websites and schools will have greater support in procuring high quality and value for money food, through the 'Get Help Buying for Schools' service. Government will also review the current policy and delivery method of the School Fruit and Vegetable Scheme. The recent launch of the joint Department

for Education (DfE) and Food Standards Agency (FSA) pilot for local authorities to assure and support compliance with the school food standards will help ensure progress is aligned with our ambition.

2.2.5. Food is already a topic within the curriculum, beginning with early years, with students receiving high quality teaching on the importance of healthy eating and nutrition. Building on this, we have recently announced up to £5 million to deliver a school cooking revolution with an ambition that children leaving secondary school know at least 6 healthy recipes. This includes developing brand new materials for the curriculum and finding opportunities for children and young people to better understand sustainable food and its connection to nature. We will support teachers and school leadership, recognising their crucial role in teaching the value of healthy and sustainable diets, and we will consider insights from Ofsted's forthcoming research review into design and technology to support the teaching of cooking and nutrition.

2.2.6. The pandemic highlighted the importance of school provision of healthy and nutritious food; an invaluable lifeline to many children and families, especially those on low incomes. We have made it easier for families to apply for and use the Healthy Start Scheme through digitisation and continue the provision of Universal Infant Free School Meals (UIFSM) to all infants in England's state funded schools, as well as continuing the National School Breakfast Programme (NSBP) for schools in disadvantaged areas. We have permanently extended entitlement of free school meals to 'No Recourse to Public Funds (NRPF)' families and will continue to keep free school meal eligibility under review, to ensure that these meals are supporting those who most need them. We have already committed to continue funding the Holiday Activities and Food (HAF) Programme with a £600 million investment over a 3-year period.

2.3. Creating a more transparent food system

2.3.1. People want better information about the food they eat, including on health, sustainability and animal welfare. Where that better information is available, the food industry responds by providing healthier, higher welfare and more sustainable food. For example, many retailers promoted free-range eggs and amended their sourcing policies following increased consumer awareness of hen welfare and the introduction of mandatory egg labelling. Similar changes have been seen in the seafood sector, where increased information and consumer

demand for sustainably sourced seafood has prompted some retailers to attach responsible sourcing requirements to seafood from their suppliers.

2.3.2. To drive positive change through better information, transparency, and accountability, we are launching a transformational Food Data Transparency Partnership. The partnership will champion consumer interests, providing people with the information they need to make more sustainable, ethical, and healthier food choices, and incentivise industry to produce healthier and more ethical and sustainable food.

2.3.3. Improving food system data and information is a shared challenge. The partnership will therefore provide a framework with the ambition to bring together government departments and agencies in England and the DAs, including DHSC, the FSA and Food Standards Scotland (FSS), with representatives from across the whole food supply chain and civil society, to at first look at the development of consistent and defined metrics to objectively measure the health, environmental sustainability, and animal welfare impacts of food. These metrics will provide the foundation upon which the partnership's activities and any future interventions will be built, seeking to minimise burdens on businesses and considering the effects of policy choices across the UK. We will consider the most appropriate mechanisms to both monitor the programme and provide assurance on any outcomes or requirements that it produces.

2.3.4. By the end of 2023, in England, we will streamline for industry all reporting requirements relating to the production and sale of food and drink. We will consult on implementing mandatory public reporting against a set of health metrics and explore a similar approach to sustainability and animal welfare. These will initially be targeted at large companies across retail, manufacturing, out of home, food to go and online delivery businesses, and we will consult fully on changes prior to implementation. In most cases large food businesses already collect information on health, sustainability and animal welfare, but it is not captured consistently or transparently. We will work with industry to minimise costs by using existing data and reporting systems as far as possible. Large companies are already required to report on scope 1 and 2 GHG emissions, which are their direct emissions (scope 1) and indirect emissions associated with their activities such as the electricity bought to heat buildings (scope 2). We will explore how to extend this to capture the scope 3 emissions, which are all emissions across a company's supply chain including those associated with supplier products. Reporting will allow for better comparability and scrutiny across the sector, allowing government to regularly report on the impacts of the food system – the independent review made the strong case for a more transparent system being fundamental to stimulating positive change. We will also look to adopt similar reporting requirements for seafood and managing the marine environment.

2.3.5. The partnership will also consider consumer information across the range of metrics for both retail and the out of home sectors. Clear information can help consumers make choices that reflect their values while enabling producers who meet high, accredited standards to market their products accordingly. In England, we will ensure that food information (such as labels, online information, QR codes) is optimised and based upon a set of established overarching principles which will be defined by government, working with industry and other key actors in partnership. These principles will include ensuring that information is consistent, accessible, easy to understand and does not mislead. We will build on what we have learnt from existing methods of consumer information and work closely with the DAs to minimise divergence across the UK. More specifically, in England:

- On sustainability: we will develop a mandatory methodology that must be used by those who want to produce eco labels or make claims about the sustainability of their products. This will drive integrity in the food system by preventing ‘green washing’ claims whilst we work with industry to improve environmental information for consumers. Working with the sector and existing assurance schemes, we will consider the role of Earned Recognition to acknowledge environmentally sustainable farming and look at how sustainable practices can be communicated to consumers.
- On health: we will build upon learnings from existing methods of consumer information, such as front of pack traffic light nutrition labelling, and will consider how the current regime could be strengthened to support consumers to make informed and healthier choices. The government will set out further detail in the health disparities white paper.
- On animal welfare: in 2023, we will consult on proposals to improve and expand current mandatory labelling requirements, and to introduce equivalent measures in the foodservice sector. Building on responses to government’s recent call for evidence on food labelling for animal welfare, proposals will cover domestic and imported products, considering our international trade obligations, and will help consumers identify when products meet or exceed our high UK animal welfare standards. Any changes will work in conjunction with existing assurance schemes, account for the specific circumstances of each sector, and draw upon any pre-existing standards as well as the set of standards and metrics developed in the first phase with industry. In the poultry sector, for example, there is already an agreed set of differentiated welfare standards that labelling could build on.
- On country-of-origin: we will explore whether existing country-of-origin rules can be strengthened by mandating how and where origin information is displayed, for example, on the front of packs.

2.3.6. This partnership will join up with existing work across government to promote healthier food choices, so that government can speak with one voice to industry. It will also support further measures to strengthen incentives to reformulate food, promote healthier food and turn the trend on the overconsumption of calories to tackle obesity. More detail will be considered by DHSC and will be set out in its health disparities white paper.

2.4. Public procurement leading by example

2.4.1. Our vision is that public sector food and catering is an exemplar for wider society, delivering positive health, animal welfare, environmental and socio-economic impacts. Public sector food should be healthier, more sustainable and provided by a diverse range of local suppliers. Locally produced food with reduced distance between farm and fork can provide societal benefits, such as creating personal connection between producers and consumers, supporting local food cultures and local economic growth, and improving traceability of food through shorter supply chains.

2.4.2 To deliver this vision, we are consulting on public sector food and catering policy, including the Government Buying Standards for Food and Catering Services (GBSF). We will consider widening the scope of the policy to be mandatory across the whole public sector. Within the consultation we will propose that the public sector reports on progress towards an aspiration that 50% of its food expenditure is on food produced locally or to higher environmental production standards such as organic, Linking Environment and Farming (LEAF) Marque or equivalent, while maintaining value for money for taxpayers. We will also support the sector to work with more small and local suppliers, implement new policy measures, and explore using an assurance scheme to drive continuous improvement on a local level and recognise high performing institutions. To improve accountability and inform future policy changes, we will require public organisations to report on the food they buy, serve and waste in a similar way as we will expect large companies to report on food sales under the Food Data Transparency Partnership.

3. The UK as part of a global food system

3.1. Strengthening global food security

3.1.1. We will continue to work with international partners to support worldwide action to mitigate the impact of rising global food prices and any future crises on the most vulnerable countries and people. Global food prices have risen sharply in the last 2 years leading to a global food security crisis. Almost 1 billion people in 92 countries do not have enough food to eat and 55 countries, mostly in Africa and Asia, are already in acute hunger crises, emergency, or famine conditions. Russia's invasion of Ukraine has escalated this global crisis, by causing turbulence in international agricultural commodity markets and pushing up wheat, maize, and fertiliser prices. This impacts the nutritional status of vulnerable people around the world, puts more people at risk of famine, and threatens the political and economic stability in many developing countries.

3.1.2. We know from previous food price crises that the best way to keep food prices down is to keep food trade flowing. Therefore, we are advocating for all countries, including in the World Trade Organisation (WTO), to keep food trade flowing and avoid trade-restrictive measures. We are providing significant support to mitigate the impact of high food prices on the countries and people most at risk through multilateral organisations, such as the World Bank and the UN food and agriculture agencies. Through UK-funded programmes such as the Global Agriculture and Food Security Programme and the African Food Trade and Resilience programme, we are supporting governments, regional trade organisations and companies to promote more open and predictable food trade, sustainable food production, and resilient supply chains. Around a quarter of the UK's humanitarian aid is spent on providing food and nutrition assistance each year and the UK has committed to spending £1.5 billion on nutrition outcomes by 2030.

3.1.3. We are also working to increase the sustainability of agriculture internationally to help build a resilient and secure global food system whilst supporting people, climate and nature. For example, as COP26 presidents we are taking forward the Agriculture Breakthrough to make sustainable agriculture the most attractive and widely adopted option for farmers by 2030, as well as the sustainable agriculture Policy Dialogue, which is raising international ambition to transform our agriculture and food systems.

3.2. Maximising the benefits of new trade agreements post-Brexit

3.2.1. International trade offers UK consumers great opportunities to buy and eat exciting new products that cannot be produced domestically. Being part of a globalised food system also contributes to our food security through a combination of strong and consistent domestic production of food as well as a diversity of supply sources through trade. We must strike a balance between supporting domestic production and the high standards we rightly set for it, and imports which improve consumer choice and can encourage competition and innovation. Some of the changes that we have seen since the late twentieth century have been down to changing consumer trends. For example, rice consumption in the UK has increased fivefold since the early 1970s, and since we cannot grow it ourselves, it is not surprising that it has contributed to an increase in imports. This has led to the growth of British manufacturing industries, such as the milling industry which provides employment in deprived areas of the UK.

3.2.2. Brexit allows us to strike ambitious Free Trade Agreements (FTAs). By continuing to support our farmers and agri-businesses to sustainably increase production and export capability, we will support growth in the food and drink sector to take advantage of trade liberalisation under these agreements.

3.2.3. We will access new markets and increase our global competitiveness. For example, we are seeking increased access with countries that provide substantial opportunities for UK producers, such as India, where there is high demand for our whisky, salmon, and cheese. We aim to conclude the majority of negotiations for a UK-India FTA in October 2022. Whilst increasing access, we will safeguard our most sensitive agricultural and seafood sectors during a period of significant change. We will do this by securing protection for our Geographical Indications, ensuring fair competition, and removing trade barriers in a controlled way. For example, the recent deals with Australia and New Zealand are designed to offer protection for the farming sector through and beyond the agricultural transition, so that farmers can evolve their business models and compete at home and abroad. At the same time, we will increase consumer access to safe, good quality, good value foods, and we will promote our values and approach to production on the international stage.

3.3. Harnessing export opportunities and supporting our agri-food industry

3.3.1. We recognise that this is a period of major change in the UK agri-food sector both domestically, through the agricultural transition, and internationally, due to our FTA programme. Government will support farmers to adapt to those changes by taking a targeted and phased approach to liberalising markets, whilst retaining tariffs and deploying safeguards where that is necessary for the most sensitive sectors. In England, this approach is particularly crucial over the next six years while the Common Agricultural Policy is phased out and Environmental Land Management brought in. We will be mindful of the potential impact on Scotland and Wales, given the proportionately larger size of sensitive primary agriculture in their communities compared to England.

3.3.2. There are great opportunities for UK agriculture in many Asian markets including China, India, and Japan, as well as opportunities for UK dairy in Canada and the United States (US), and opportunities for the sheep sectors in both the US and Middle East. We have announced an export package to boost export capability, create greater opportunities for producers and manufacturers, and support food and drink small and medium sized enterprises (SMEs) to work towards exporting. We will deliver on the growing demand for our high-quality UK produce across the world and broaden the range and scale of exports.

3.3.3. This includes appointing 10 agri-food attachés across the world to support UK food and drink exporters to break into and flourish in key growth markets. We are also establishing a new Export Council that brings industry and government together to boost exports. We will continue to work with the Agriculture and Horticulture Development Board (AHDB) on opening access to these markets. To support our seafood industry, we recently dedicated £1 million of the UK Seafood Fund to boosting UK seafood exports, through buyer networking, increased presence at international expos and in-market specialists.

3.3.4. We are working with industry to develop a risk based global regime for imports and to remove unnecessary burdens for exports as we continue to trade with the EU and to simplify the process for trading within Northern Ireland. This includes enhanced digitisation with an extensive e-Trade programme and a Single Trade Window data platform to reduce costs and administrative burden. The Movement Assistance Scheme will provide financial support to traders who meet the certification requirements of the Northern Ireland Protocol.

3.4. Maintaining our world-leading food and animal welfare standards

3.4.1. This government was elected on a manifesto commitment that ‘in all of our trade negotiations, we will not compromise on our high environmental protection, animal welfare and food standards.’ During the passage of both the Agriculture and Trade Acts, we saw how much the British public care about the standards of food on offer, no matter its origin.

3.4.2. We will always ensure that FTAs protect domestic standards in all these areas and our existing related controls on imports, including our Sanitary and Phytosanitary (SPS) regime. We will shortly be publishing a statement on our independent animal health and production regime to provide more detail. This will set out our requirement that those wishing to access the UK market must objectively demonstrate their approach continues to deliver an equivalent level of health protection to our domestic standards. It will also describe how our SPS regime will evolve based on evidence to face the modern global challenges of antimicrobial resistance and zoonotic diseases. This will include considering how animals are managed to prevent disease outbreaks, alongside a holistic consideration of the related matters of antimicrobial resistance, animal welfare and environmental protection. Through promoting this world-leading approach, we will help guide the international trading system to better respond to current and future challenges.

3.4.3. We will take a balanced approach to tariff negotiations that considers the interests of consumers and existing producers. We will use the full range of levers at our disposal – including tariffs, quotas and safeguards. Decisions on the liberalisation of products through FTAs will consider factors such as climate change, animal welfare and the environment alongside the broader economic and strategic benefits of our trading relationships. For example, in our FTAs with Australia and New Zealand we have eliminated tariffs on a range of environmentally friendly goods including wind turbine parts and electric vehicles. In the Australia FTA we excluded pig meat, chicken and eggs from tariff preferences, reflecting concerns about animal welfare and the low volumes of trade between Australia and the UK on these products. As we negotiate more FTAs, we will continue to use levers inside and outside trade negotiations to demonstrate the importance of these issues to the UK and promote better practices around the world.

3.4.4. Trade policy and the UK's international development work provide a wider opportunity to influence and improve global standards in food production. For example, our recent FTAs with Australia and New Zealand both contain provisions supporting co-operation in the fight against antimicrobial resistance, which we will seek to include where possible in all our FTAs. They also contain standalone chapters on animal welfare and the environment. These include non-regression commitments for animal welfare, commitments to cooperate on improving standards, and commitments to work together on important environmental issues including delivery of targets set out by the Paris agreement. We are also promoting sustainable trade through WTO Committees and discussions.

3.4.5. Our trade policy sits alongside our international development work: to build a coalition of support for enhancing environment and animal welfare standards globally; and to support food producers in developing countries to achieve progressively higher standards.

3.5. Championing a nature-positive global food system

3.5.1. The international development strategy, published in May 2022, affirms our commitment to promote climate-resilient, sustainable food systems globally, whilst accelerating green growth, trade and economic opportunities, especially for women, in agriculture and food. We will continue to lead on promoting sustainable food supply chains and working in partnership to deliver on our international commitments.

3.5.2. Furthermore, through the Environment Act, we will implement due diligence legislation to tackle illegal deforestation in UK supply chains. We will also continue to measure the global environmental impact through our recently published indicator, including tropical deforestation risk of UK consumption of key commodities.

3.5.3. The UK is also acting globally to combat illegal, unreported and unregulated (IUU) fishing. Brexit provides the opportunity to strengthen the UK's IUU fishing policy beyond the EU approach. This will be set out in the UK IUU fishing strategy later this year

3.5.4. We will consider options to address risks of carbon leakage (displacement of production and emissions due to unequal pricing/ regulation across jurisdictions) within the food system. Our reporting on the

environmental and health impacts of the food system will include an assessment of our global environmental impact.

4. Conclusion

4.1. This food strategy sets out government ambitions and priorities to create a more prosperous agri-food sector that delivers healthier, more home-grown and affordable diets for all, regardless of where people live or their income. The strategy identifies a number of measures to achieve this (summarised in the Executive Summary), targeting a variety of actors across the entirety of the food supply chain.

4.2. This strategy is the beginning of this conversation, building upon the independent review, existing work across government and the actions already being taken forward by industry and other key actors.

