FDSC
The Food and Drink Sector Council

Feeding the Future:
Working together to build the National Food Strategy

FSWG
Food Strategy Working Group

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Food Strategy Working Group

Contents

Foreword

From the co-chairs of the FDSC's Food Strategy working group, Stuart Roberts, vice-president of the NFU and Stefano Agostini, Chief Executive of Nestlé UK & Ireland

It has been a pleasure to work with so many people from across the food and drink supply chain in writing this report as part of our industry's contribution to the creation of a National Food Strategy. This work has been particularly timely, on the back of the Covid pandemic when industry has been tested like no other time in modern history, and has shown remarkable resilience and fortitude. The Food and Drink Sector Council believes that the food sector has a unique opportunity and responsibility through the development of a national food strategy to ensure that we address the present and future challenges that our sector, and the wider UK society, are facing – be they environmental, economic or social.

We believe this is a comprehensive, detailed analysis of where the industry is and what we need to do to achieve our vision of delivering a stronger industry and improved food culture in the UK by 2030. At its root, is the idea of a partnership between the sector, the government and ultimately consumers. It is vital that industry and government work together to address the immediate problems in the food supply chain, but also accelerate the transition to a more productive and sustainable food system for the future.

The footprint of the UK food sector is vast and interconnected, impacting the environment, the economy and every citizen. Events of the last 18 months has brought to life just how the entire nation has a vested interest in its future success. Now is the time that we all must step up to address these challenges. We each have a vital part to play, which is why we have set out a partnership approach so that together we can nurture and grow the value of our food and drink that we all enjoy and that makes us who we are.

We believe this notion of partnership is mirrored by our approach to chairing the FDSC Food Strategy working group.

Stefano is Italian by birth, living in London, running the British and Irish operations of Nestlé, a Swiss company that makes British brands as well-loved as Kit Kat, Buxton Water and Shreddies.

Stuart is currently Deputy President of the National Farmers Union. He is a third-generation family farmer from Hertfordshire. He grows cereals and raises cattle and sheep.

In some respects, Nestlé and Hammonds End Farm couldn't be more different. One is large, and one is small. One produces the raw ingredients, the other processes and packages product from around the world. One is part of a large multinational business. The other's direct sales are confined to local counties.

But what binds the businesses together and binds together the millions of people who work in our industry, is a passion for our work – producing the food and drink which is at the heart of the plates of tens of millions of people every day. At the root of it, food and drink are personal, and it is why we take the questions to surround it seriously, including bringing to bear our personal experiences to this report.

For Stefano, that means making sure people can have the time, space and means to enjoy food, no matter what else is going on in their life. The culture of food was important to him as a boy growing up in Italy, and he wants to impart that in his work.

For Stuart, it means learning the lessons from his own food journey, not punishing himself for being 'fat and happy' but focussing instead on enjoying what he ate and when he ate it, but in balance and positivity to form new and more healthy habits. This behavioural nudge was a more powerful motivation than guilt for wanting that pudding after Sunday lunch or enjoying a takeaway. For Stuart it is more than just about calories and fuelling our bodies. It's also about our food values, what we enjoy, what we care about and how we create a better future from our personal health to the health of our planet.

These ideas frame the report to have a stronger food culture, built on positivity and partnership, that leads to a more productive, sustainable food and drink sector, to the benefit of the 4.1 million who work in it and the 70 million people it feeds every day in Britain. It is a vision we, as the Food and Drink Sector Council, are proud of and which we look forward to working towards in partnership across our sector, with government and our customers.

Stefano Agostini
Chief Executive
Nestle UK & Ireland

Stuart Roberts
Deputy President
National Farmers' Union

Overview

2030 Vision

Our vision is a thriving UK farm-to-fork food sector that is innovative, collaborative and globally competitive. That provides fantastic, affordable food sustainably and to the highest standards. That supports healthier diets and encourages better choices. That offers exciting business and employment opportunities throughout the food chain. That reconnects people with the food they eat and the natural environment where it is grown. And that together this creates a distinctive and much-loved food culture in every part of the country.

PEOPLE · ECONOMY · ENVIRONMENT

RECOMMENDATIONS

Productivity & Skills	Innovation	Trade	Sustainability	Health	Government/industry collaboration
Great British Food and Drink Campaign	Boost capital investment needed for "Industry 4.0" transition	Maintain strong support for high food standards	Reduce emissions through new technologies and renewable energy	Ten year government strategy for obesity and balanced diets focusing on changing UK food culture	Partnership with and support for the sector to deliver short term economic recovery and long-term sustainable growth
A comprehensive skills levy	Ensure sector gets fair share of innovation funding	Engage with UK government to reduce frictions in UK-EU trade	Ensure agriculture support schemes deliver sustainable food production and net-zero	Partner with government and academics to innovate for health and environment	Explore the introduction of an Office for Regulatory Impact
Expand Lifetime Skills Guarantee	Streamlining and improving the accessibility of innovation	Improve SMEs ability to export	Introduce support and regulation to enable the sector to reach net-zero	Support local authorities to deliver targeted community programmes	Deliver FDSC recommendations on levelling up and net-zero, and support government's ambitions
Diversity and inclusion toolkit for SMEs	Establish "best practice" models for data sharing	Ensure UK government recognises the strategic importance of imports of GVA	Support measures to build a circular economy	Partner to incentivise and nudge consumers to healthier choices	Build the case for match funding by government for FDSC's work
Public/private investment to leverage digitalisation, efficiency and carbon reduction	Support industry gateways to access innovation expertise and funding	Create a 'Team UK' approach to trade priorities and promotion	Achieve sectoral emissions reductions target for 2030	Industry/brands amplification of government public health campaigns	A coherent approach and effective delivery of food policy
Increase food and drink GVA by a third	Promote a more innovative culture	Support the recommendations of the Trade and Agriculture Commission	Improve water use and soil health	Halve childhood obesity rates	Regular review of progress to targets and consider future intervention
Reverse decline in food industry apprenticeship starts	Double the R&D spend by 2027	Increase value of exports in line with global demand	Zero food waste sent to landfill	Reverse the rate of adult obesity	Continued commitment to work with FDSC to deliver food strategy outcomes
A flexible and responsive immigration system to ensure labour market needs are met.	Deploy digital technology in line with Made Smarter recommendations		Minimise packaging waste and maximise recycling	Remove the dependency on food banks	

Executive Summary

VISION

"Our vision is a thriving UK farm-to-fork food sector that is innovative, collaborative and globally competitive. That provides fantastic, affordable food sustainably and to the highest standards. That supports healthier diets and encourages better choices. That offers exciting business and employment opportunities throughout the food chain. That reconnects people with the food they eat and the natural environment where it is grown. And that together this creates a distinctive and much-loved food culture in every part of the country."

Introduction

The report sets out the food and drink industry's contribution to the UK Government's forthcoming National Food Strategy and demonstrates the Council's commitment to collaborate with stakeholders across the industry. Reflecting the analysis in this report, the Food and Drink Sector Council recommends an approach that puts consumers at the heart of the National Food Strategy. We must engage the public in the journey to a sustainable and healthier food system; and encourage and incentivise consumers to change their purchasing decisions and make healthier, sustainable choices over time. At the same time, and to really drive the change that is needed, industry must make the necessary investment, innovation, and product improvements to meet changing public demand and provide healthier, sustainable food and drink. Government policies, financial assistance, and practical interventions at national, regional and local levels will need to support this strategic approach. In any National Food Strategy, the food industry must be the solution, and not the problem, for the strategy to succeed.

To deliver a better food culture with a vibrant food and drink sector at its heart, the Food and Drink Sector Council seeks to build on the existing collaboration with UK Government and develop a strong partnership between our industry and the governments in London, Cardiff, Edinburgh, Belfast, and our industry to effectively deliver a coherent food policy across Whitehall departments and Devolved Administrations. The policy proposals recommended in this Report set out the way forward to deliver the FDSC's vision.

Success defined

By 2030 the UK will have a thriving, world-class food industry that:
- is productive, competitive and entrepreneurial
- is innovative, collaborative and connected
- deploys leading edge technologies and is home to internationally leading Research & Development
- operates highly efficient, resilient supply chains in the UK and internationally
- protects the natural environment and reduces all forms of waste in the agri-food chain

The industry will grow, produce and provide fantastic food and drink for consumers that:
- is affordable and available for all
- maintains high standards of quality, safety and integrity
- offers healthy and healthier choices, clearly communicated and responsibly marketed
- is sustainably grown, produced, packaged and distributed

It will create exciting opportunities throughout the agri-food chain that:
- attract investment, innovation and new business
- provide employment and training for a proud, skilled and engaged workforce
- contribute to thriving communities wherever food is grown, produced and sold
- reconnect people to the food they eat and the natural environment where it is grown

Roadmap to 2030
Summary of actions and recommendations

A more productive, highly skilled food and drink sector

Roadmap

- Developing and leading an industry campaign that champions 'Great British' Food and Drink careers.
- Replacing the current Apprenticeship Levy with a comprehensive skills levy
- Building on the Lifetime Skills Guarantee, alongside supporting the take up of T-Levels through industry placements and a greater focus on STEM subjects in the higher education system, including on food topics.
- Introducing diversity and inclusion toolkits that can be used by small and medium-sized enterprises (SMEs). This includes considering a 'charter' on best practice for the industry.
- Alongside enhancing skills, more support from the government for investment in plant and machinery, to leverage digitalisation to gain greater labour and resource efficiencies.

Industry and Government should strive to:

- Increase the Gross Value Added (GVA) generated by food and drink by a third by 2030
- Provide the resources to embed, attract and skill more people throughout the food and drink sector whilst providing additional resilience through a flexible and responsive immigration system that ensures vital labour markets needs can be met.
- Routinely offer the opportunity for everyone in the industry to gain a qualification by 2030 so the workforce and industry has the skills needed for digitalisation, decarbonisation, sustainability, and the circular economy.
- Reverse the trend of the decline of apprenticeship starts from almost 50,000 in 2015-16 to just over 30,000 in 2017-18.
- Reflect the diversity of the country, including at senior levels of management and in the board room in the food and drink sector.

A food and drink sector that is more innovative

Roadmap

- Boosting capital investment needed for the "Industry 4.0" transition (greater digitalisation and connectivity) of the UK food and drink sector. The government's super deduction policy should be extended beyond 2023 to lay the firm foundations of a decade of investment.
- Ensuring the sector gets its fair share of innovation funding from government by maximising the opportunities in the UK Government's Innovation Strategy, reflecting the importance of the sector and its centrality to public policy.
- Unlocking more private investment in R&D – including pro-investment tax and regulatory policies, such as changes to R&D tax credits and increased capital allowances.
- Streamlining and improving the accessibility of innovation, including through an innovation finance scheme modelled on export finance, a government-backed loan scheme for advanced hardware for smaller businesses and a strategy on supporting the development of alternative proteins.
- Following up with the government's National Data Strategy by establishing "best practice" models for data sharing.
- Supporting industry innovation gateways in agriculture (AHDB), manufacturing (FDF) and retail (BRC) to help SMEs access innovation expertise, unlock funding and de-risk investments through demonstrator hubs.
- Promoting a more innovative culture, including encouraging the establishment of people exchange and a secondment programme between industry and academia, and the creation of new food and drink innovation centres at universities, in partnership with industry.

Industry and Government should strive to:

- Double the industry's R&D spend by 2027.
- Increase the amount of R&D funding towards SMEs for agriculture and food and drink manufacturing.
- Increase consumer support for innovative food and drink products.
- Deploy digital technology as proposed by the government's Made Smarter review to create £55 bn of extra value for the sector cumulatively in the next decade.

Roadmap to 2030
Summary of actions and recommendations

A food and drink sector that trades with ease at home and abroad

Roadmap

- Maintaining strong support for high standards of food production in the UK and the integrity of raw material inputs.

- Engaging with the UK Government to explain and reduce frictions in UK-EU trade under the Trade and Cooperation Agreement (TCA) commensurate with our own trade or food values.

- Improving SMEs ability to export and to help them identify growth opportunities overseas.

- Ensuring the UK Government recognises the strategic importance of imports for GVA and to enable production for our key export markets (such as tea leaves for tea).

- Creating a 'Team UK' approach to trade priorities and promotion so governments in London, Edinburgh, Cardiff, and Belfast all pull together to support English, Scottish, Welsh and Northern Irish exporters.

- Continuing to support the other recommendations of the Trade and Agriculture Commission

Industry and Government should strive to:

- Increase the value of exports, including by at least matching the expected increase in global demand with UK supply, with global food production needing to increase by 35% by 2030 and double by 2050[1].

- Increase the proportion of food and drink businesses exporting from the current 17% level.

- Increase the proportion of SMEs exporting, from the current base of just 1% of exporting businesses account for 52.5% of the UK's total food and drink exports[2].

A sustainable food and drink sector for the future

Roadmap

- Reducing emissions from producing food and drink in the UK by adopting new techniques and technologies and using renewable energy.

- Ensuring agriculture support schemes like Environmental Land Management (ELM) link to and support sustainable food production and net-zero for agriculture. As recommended by the Henry Dimbleby report, the government should maintain the value of support payments to farmers through the whole decade.

- Introducing support mechanisms and regulatory changes to enable the sector to reach net-zero by 2040 and not be limited to fiscal measures such as taxation.

- Supporting measures to build a circular economy, including an independent review on water management framework.

Industry and Government should strive to:

- Achieve sectoral emissions reductions target for 2030 to indicate pathway to 2040 net-zero target.

- Improve our water use and improve soil health by 2030.

- As a priority, establish clear agreed definitions and measures on biodiversity, as the first step in a decade of progress to reverse biodiversity loss in the UK.

- Have zero food waste sent to landfill by 2030.

- Transform our performance on minimising waste in packaging and maximising recycling by 2030.

1 - Feeding 9 Billion | National Geographic
2 - DEFRA analysis of HMRC/ONS data

A food and drink sector that provides healthy and affordable food for all

Roadmap

- A ten-year government strategy encompassing obesity and balanced diets focusing on changing the food culture in the UK to improve diet/ nutrition based on insights of what we eat, why we eat it and how change can be delivered - which will give companies certainty and enable them to focus on delivery.

- Industry to partner with the government and academics looking to innovate across the food chain for health and environment, including through the UK Research and Innovation (UKRI) bids.

- The government supporting local authorities to deliver appropriate community programmes, alongside Henry Dimbleby's suggestion of a 'Eat and Learn' programme, with support from industry as appropriate. This will take learnings from Leeds and Amsterdam.[3]

- Industry and government partnering to incentivise and nudge consumers to healthier choices, including through store card schemes and the Government's health incentive programme, spearheaded by Sir Keith Mills.

- Companies using the power of their brands to amplify government public health campaigns. These will provide consumers with more, easy to understand "shortcuts" like "1 of 5 A Day" and propose more "simple swaps" for consumers to make. Consistent and clear labelling should support this.

- More reformulation and smaller portions, with a government-led 2030 Challenge recognising that to succeed it needs consumer assent, and this can take time.

Industry and Government should strive to:

- Halve childhood obesity rates.
- Reverse the rate of adult obesity.
- Remove the dependency on food banks by 2030.

A food and drink sector that works in partnership with government on the big issues

Roadmap

- UK Government to work in partnership with the sector to help deliver short-term economic recovery and long-term sustainable growth.

- UK Government to explore the introduction of an Office for Regulatory Impact alongside a regulatory initiatives grid, similar to the one produced by Her Majesty's Treasury (HMT), Bank of England (BoE) and Financial Conduct Authority (FCA) for the financial services industry.

- Industry to work with the UK Government on delivering the commitments set out in this report, as part of the forthcoming National Food Strategy.

- Industry and the UK Government to regularly review the progress towards meeting targets, including on obesity and net zero, and consider collective intervention if necessary, to reach them.

- Industry to deliver the FDSC recommendations on providing opportunities to level up and reach net-zero and demonstrate how the sector can support the government's ambition in this area.

- Industry and Government to build the case for match funding by government of the FDSC's work, including on building a digital infrastructure as seen in the Feed UK project.

Industry and Government should strive to:

- Create a structure for a coherent approach to and effective delivery of food policy across Whitehall departments and the Devolved Administrations.

- Continue its commitment to the work of the Food and Drink Sector Council to deliver the outcomes of the National Food Strategy.

3 - See pg 27 for details

Our vision for food and drink in 2030

As the voice of the food and drink sector, this paper sets out the Food and Drink Sector Council's (FDSC) vision for 2030 and the steps needed to achieve it.

At its core, our vision for 2030 is a stronger food culture: where the quality, provenance and sustainability of what we eat and drink is prized and contributes to our health and wellbeing; where young people at school learn more about food, develop a love of cooking and value food and drink and those who produce it more; where animal welfare, the safety of food and the use of technology are globally recognised as best-in-class; and where the people who work in food and drink, from hill farmers to technologists, are provided with rewarding employment across the whole of the UK, drawn from all the communities who make up our country and are able to contribute to the economy.

The FDSC has a clear, confident vision of where we want to be at the end of this decade: a sector that is more productive than it is today; ensures health and sustainability alongside delivering affordability, convenience, and choice; that supports a diverse workforce with better skills; that encourages innovation, and that sells more fantastic products abroad and at home.

To deliver a better food culture with a vibrant food and drink sector at its heart, we need a coherent food policy across Whitehall departments and Devolved Administrations, and a true partnership between our industry and the governments in London, Cardiff, Edinburgh and Belfast. We warmly welcome DEFRA's plan to produce a National Food Strategy for England as well as other steps being taken across the four nations. This strategy is our contribution to building that partnership and delivering effective change.

The food industry's role in the food system – a creator of solutions

The creation of a National Food Strategy offers a unique opportunity for everyone in the food chain to work together to build the food system of the future. The FDSC supports a holistic National Food Strategy that reflects the interdependencies between the social, economic and environmental dimensions of the food system. The strategy should recognise the vital role played by the farm-to-fork food industry at the heart of this complex system. It should recognise that policy changes in any part of the food system have impacts in all parts of the food system. And it should establish a joined-up and collaborative approach to the food system, and to the food industry, across the many Government Departments which make policy affecting it. These include No 10, Cabinet Office, DEFRA, BEIS, HMT, International Trade, Health & Social Care, Education, Transport and the Home Office.

In the UK, and in most of the global food system, the food industry is commercial, highly competitive and market based. A complex international network of farmers, producers, manufacturers, distributors, retailers, and hospitality businesses, and their many supplier industries, collaborate and compete to meet changing consumer demand. It is a highly decentralised and competitive market, driven not by central command and control, but by millions of individual purchasing decisions and commercial transactions every day. It is fast, efficient, and innovative in response to consumer demand. But changes in demand are necessary to drive significant changes in the outputs of the food system.
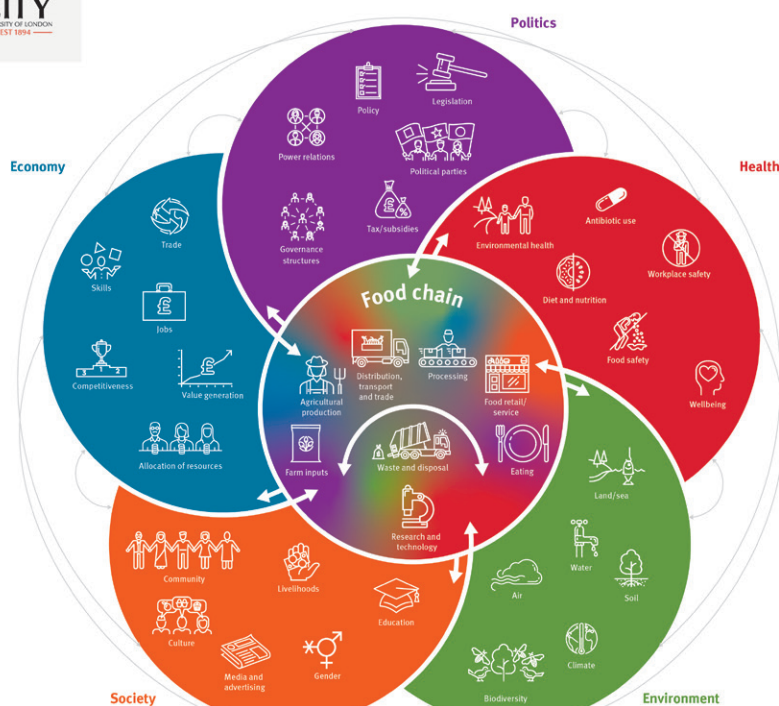
Our food system today has been built over the last 75 years to tackle the major food challenges since the Second World War. Throughout that time the farm-to-fork food industry has been outstandingly successful in meeting the British public's changing needs and solving the food system challenges behind them:

- In response to post-war food shortages and a rapidly growing population, farmers and suppliers massively increased agricultural and manufacturing productivity - and the availability of essential fresh produce and manufactured food and drink.

- As the post-war generation emerged from austerity and rationing, consumer demand grew for greater choice, wider availability, and the introduction of more indulgent and premium products, which the farm-to-fork food industry provided.

- Major social and economic changes saw far more of the population, primarily women, entering the workplace and looking for more convenient products to prepare or to be ready-to-eat. Over time, people also increasingly ate more out of home and on the move. The food industry responded to these changes with an evolving range of food and drink for the home and on the high street.

The food system

Centre for
Food Policy
Shaping an effective food system

Parsons K, Hawkes C, Wells R. Brief 2. What is the food system?
A food policy perspective. London: Centre for Food Policy; 2019.

The consistent public demand throughout this period has been for food and drink that is affordable, convenient, widely available and great tasting. The food system, and the industry at its heart, has therefore evolved to deliver these fundamental priorities.

The transformation of the food system over the last 75 years is a remarkable achievement to be proud of and to celebrate. The starting point for the National Food Strategy must recognise the food and drink sector's proven track record as a successful problem solver and provider for the British public. In any National Food Strategy, the food industry must be the solution, and not the problem, for the strategy to succeed.

The future food system – new solutions to emerging challenges

There is also a fundamental difference between the challenges of the post-war period and the emerging challenges for the future. Over recent years it has become increasingly clear that, while the food system has successfully provided greater choice, convenience and affordability, there have been long-term, unintended consequences for the environment, public health and other areas of the system.

For decades public demand, and the aims of successive Governments, have been aligned to create a food system which provides choice, convenience and affordability. This created the market for new food and drink products, and for the investment and innovation needed for the industry to meet those changing needs. When there is clear, strong public demand, supported by government policy, the market-based food industry is able to deliver major change, at scale and pace.

The environmental and health challenges now facing our food system are widely recognised by all stakeholders, including the general public. However, consumer and shopper demand for healthier, more sustainable products is still in an early phase.

Our vision for food and drink in 2030

Choice, convenience, taste and price remain the public's priorities when they make their purchasing decisions. And at a time when many communities and families are facing financial uncertainty and hardship, people are understandably reluctant to see the price of food and drink increase. So, while the British public, of course, supports healthier and more sustainable food and drink, there is not yet the clear and strong public demand needed for either government or the industry to deliver the changes in the food system that will be needed.

This challenge has fundamental implications for the National Food Strategy. As the farm-to-fork food industry, we are very clear that we should play a leadership role in the journey to a healthier, sustainable food system. But the National Food Strategy, and the food industry, must serve the needs of the British public. So, there must be a consumer-led transformation at the heart of the National Food Strategy, and the British public must be supported and enabled to choose and buy healthier and more sustainable food and drink within a balanced diet. As the British public increasingly values and demands healthier, sustainable food and drink, the food system, with the food industry at its heart, can and will provide the leadership to deliver it.

Opportunities and risks for the food industry

The UK food industry is world-leading in many areas of farming, manufacturing, retailing and hospitality, and it provides the British public with an outstanding choice of food and drink. The industry benefits from the UK's internationally renowned universities and research institutions. UK farming produces food of exceptional quality and provenance. Our food standards and safety are very high. The efficiency of the industry supply chain, from farming and processing through to retailing and hospitality, provides exceptional value for consumers. And the UK is building on its strong national and regional food traditions to develop a richer food culture.

So, the industry has great strengths on which to build, and many opportunities to leverage these advantages. However, the strengths of our food system, and the resilience of the farm-to-fork industry, should not be taken for granted. Feeding the nation is the most strategically important responsibility of

any government, and the food industry is the provider and deliverer. This shared responsibility was demonstrated most recently during the UK's exit from the EU, and the emergence of the Covid pandemic, when the UK Government and the food industry worked together brilliantly to keep the food supply chain working. The food chain is fragile, and the food industry is stretched from farm-to-fork. The potential for system failures in the food supply chain is real, and the social, economic and political costs would be severe.

Industry and the UK Government should continue to build on this successful collaboration and trust to develop a true partnership to tackle challenges but with a greater understanding of the pressures many businesses are facing and collectively decide where we can make the greatest impact. To support this, industry will need to face head-on the challenges of the future and work together across the supply chain to move the market collectively. However, the UK Government must find a coherent approach to develop and deliver food policy across Whitehall departments and Devolved Administrations, providing a clear structure for this partnership to thrive. For example, the UK Government has developed three separate strategies for the recovery of tourism, hospitality and high streets. In order to ensure that these strategies are joined up there needs to be a mechanism to connect Whitehall departments and Devolved Administrations as well as aligning them to the National Food Strategy and the work of the Food and Drink Sector Council. This structure will ensure that the strategies are mutually supportive and will help to strength the food supply chain as the economy recovers.

So, to fulfil its vital role, the industry requires support and collaboration with the UK Government across the food chain, from farming and manufacturing through to retail and hospitality. The National Food Strategy should support a strategically critical industry during a period of unprecedented volatility.
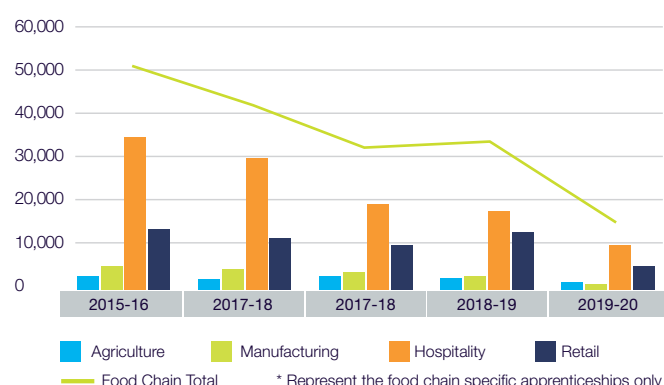
A more productive, highly skilled
food and drink sector

By 2030, the UK food and drink sector is a leading contributor of a more productive, levelled-up UK economy, with a food system where all stakeholders can thrive. Our industry will provide rewarding employment for a diverse workforce, across the whole country, equipped with the skills to harness the opportunities of digitalisation and a greener economy. In pure statistical terms, this means a higher Gross Value Added (GVA) contribution than today, driven by greater investment, more premiumisation and stronger exports; in human terms, this vision means an industry that is more attractive to draw in and retain talent by ensuring we all have the opportunity to develop further in their careers.

Where we are today

The food and drink sector has consistently had higher productivity gains than much of the economy since 2008[4]. The industry is full of people who are passionate about the work they do, as demonstrated recently by their commitment in feeding the nation through lockdown. However, like much of our economy, we know that there are productivity gains to be had. And with an ageing workforce, low levels of unemployment coupled with a reduction in free movement of people and unprecedented disruption of the Covid-19 pandemic, we are seeing chronic labour shortages across the whole supply chain. Ensuring the sector has access to a pipeline of talent at all skills levels is critical. We should invest more in technology which will in turn create higher skilled, better paid jobs, supporting our people to add more value by developing their skills to help with retention; and attract more graduates and apprentices with technical skills into the sector. Small and medium sized enterprises (SMEs) in particular will need to be supported in this endeavour.

The roadmap to 2030

The entire food and drink chain has the potential to transform its performance and contribute more to the economy through the fourth industrial revolution of AI, automation, drones, connectivity, and big data, collectively known as "Industry 4.0". ONS data suggests that between 2009 and 2019, GVA grew by 21% in agriculture, 23% in manufacturing and 33% in food and accommodation services, with an average growth rate of 28% for the whole sector[5]. Our ambition, as we go through "Industry 4.0", is to exceed that target by at least five percent.

Realising that potential will require more investment in kit – tech, machinery, and the underlying data systems – and more investment in the skills of those who work in the industry. This section deals with people, the next will look at capital and innovation.

On people and the transition to "Industry 4.0", the key is a combination of upskilling the existing workforce and recruiting new talent. We need an agile skills system to support upskilling. The existing Apprenticeship Levy in England isn't flexible enough, limiting what it can deliver. It should be replaced by a broader Skills Levy to cover all staff and support a broader range of training.

Food Chain apprenticeships starts*
(Standards and Frameworks)

Legend: Agriculture · Manufacturing · Hospitality · Retail
Food Chain Total · * Represent the food chain specific apprenticeships only

Predicted GVA increase by 2030

4 - Total Factor Productivity of the United Kingdom Food Chain 2018 – final release - GOV.UK (www.gov.uk)
5 - Source: ONS Gross Value Added (2019)

A more productive, highly skilled food and drink sector

The introduction of the Lifetime Skills Guarantee[6] in England is welcome. An estimated 11 million adults – including those working in the food and drink sector – can now gain free new qualifications. We need to build on these programmes, including sector-based approaches such as skills bootcamps and supporting the take up of relevant T-Levels.

There is huge potential for recruitment in this sector. Indeed, for agriculture, consumer insight studies from Agriculture and Horticulture Development Board (AHDB) have suggested that 66% of the population have a positive or very positive view of agriculture in 2020, up by 4% from 2019 before the pandemic, with only 4% having a contrary view. Those aged between 25-44 also have the highest interest in food production, suggesting a promising group of future employees and influencers.[7]

Yet across the sector the median age of the workforce is higher than the average for the economy. For instance, the median agricultural worker is aged 60[8]. The sector needs to recruit and retain a new generation of people by providing rewarding employment and career progression.

To help with this, we need more young people to learn about the importance of food as an industry. We therefore support the Institute for Food Science and Technology's[9] (IFST) campaign to introduce more food related topics into the school science curriculum, as well as the promotion of more STEM subjects at both the further and higher education level. Such steps can help raise the profile of the food and drink sector as a desirable industry to work in among school children whilst giving them an awareness of an interest in the skills, capabilities and behaviours needed to thrive in the sector. We also support the principles mentioned in Henry Dimbleby's report[10] of an 'Eat and Learn

programme' as well as the promotion of the 'NFU Education' toolkit[11] as ways to learn more about food.

Apprenticeships should play an important role in recruiting this new generation, but the uptake of apprenticeships in the food chain is declining. Apprenticeship participation fell from almost 50,000 in 2015-16 to just over 30,000 in 2017-18. This decline has continued during the Covid pandemic, with Apprenticeship starts falling by 45% during the first lockdown and remaining 28% lower than pre-pandemic levels[12]. 80% of apprentices also appear to be drawn from existing company employees.

The English Apprenticeship Levy scheme needs to be more adaptable, easier to implement and should be reformed to give employers more flexibility over how the scheme works. Companies in England above the £3m pay bill threshold currently pay into an Apprenticeship Levy fund, which expires after 24 months, or which is not directly credited to businesses in Scotland. We advocate extending this to 36 months, widening the criteria on how the levy could be spent - including on capital and backfilling costs, and increasing the 25% cap on companies being able to share this fund with other companies. Working in partnership with the education sector and industry, the Westminster government should stimulate and encourage SMEs to participate in Apprenticeships leading to increased productivity, social mobility and supporting the economic recovery.

According to the ONS, around one in ten of graduates enter the sector[13]. Going forward food and drink needs to continue to attract new graduates in increasing numbers with the skills needed to drive digitalisation, decarbonisation, sustainability, and the circular economy. This includes utilising the Degree

Case Study: Allied Bakery Graduate Scheme

ALLIED BAKERIES

In 2012, Allied Bakeries, part of ABF Grocery, started a new engineering graduate scheme to help nurture the next generation of engineers, by giving young people opportunities to gain diverse experience of working in fast-moving consumer goods (FMCG) through a three-year rotation scheme across Great Britain and Northern Ireland.

Each six-month placement includes hands-on craft work on the shop floor, maintenance planning, capital projects, front line production managements on-shift and new product development.

The scheme has grown by leaps and bounds and has become one of the premier graduate schemes in the sector and a leader in gender diversity and representation. Of the 10 graduates who have participated on the scheme, seven have been female and have gone on to have successful careers within the company.

Source: Allied Bakeries

6 - Adults to gain new skills on 400 free courses - GOV.UK (www.gov.uk)
7 - 3 AHDB – Consumer priorities when purchasing food report 2020
8 - FSS2013-labour-statsnotice-17jan19.pdf (publishing.service.gov.uk)
9 - IFST | Inspiring Excellence and Trust in Food
10 - The National Food Strategy - The Plan
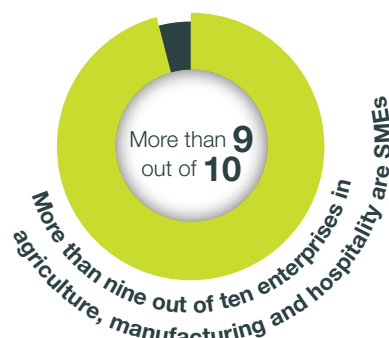11 - Home - NFU Education (nfuonline.com)
12 - Budget: 'Tackle the deeper problems with apprenticeships' (feweek.co.uk)
13 - ONS: Graduates in the UK Labour Market 2017.

Apprenticeship pathway. We also aspire to have even more graduate programmes in the sector represented in graduate employer rankings, with nine graduate management programmes featured in the Times 100 top graduate employers in 2020-21[14].

The fragmentation of the sector makes competing for talent challenging, especially if companies are based in the countryside, with 83% of the UK population living in urban areas[15]. More than nine out of ten enterprises in agriculture, manufacturing and hospitality are SMEs[16]. The sector should explore creating a scheme, endorsed by DEFRA, modelled around 'Teach First[17], or

More than 9 out of 10

More than nine out of ten enterprises in agriculture, manufacturing and hospitality are SMEs

'Police Now'[18] dedicated for the food and drink sector, providing the hiring infrastructure for smaller companies to coalesce around to compete nationally for talent. This could include a rotational scheme covering the whole of the food chain: agriculture, manufacturing, retail, and hospitality, alongside a formal management qualification. We should also tap into other work experience and youth development schemes, such as the National Citizenship Service[19], the Duke of Edinburgh Scheme[20] and the IGD Feeding Britain's Future[21] work programme to further increase visibility of the sector to young people. These recruitment programmes could be achieved under an agreed unifying theme, such as 'Great British Food and Drink,' to strongly

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Case Study: **The Institute for Agriculture and Horticulture**

The food and drink industry has come together to create The Institute for Agriculture and Horticulture (TIAH) as the primary organisation for information on skills in the agriculture/horticulture sector, TIAH will support all workers regardless of the size of business they work for.

The Food and Drink Sector Council (FDSC) Agricultural Productivity Working Group have adopted the recommendations of the Skills Senior Leadership Group to address the lack of high-level leadership and collaboration missing to instigate real change and impact and full support bringing the concept of TIAH to life.

TIAH is being established with support from both industry and DEFRA, with a vision to improve agriculture for the benefit of the public at large by the provision of education, training, advice, and information for people working in agriculture. It will inform, inspire and co-ordinate the industry's approach to skills where it will embed a culture of lifelong learning and continued professional development; drive greater uptake of training and promote agriculture as a progressive, professional, and exciting career choice.

Source: TIAH

Case Study: **Victoria Barella - From shopfloor to shop manager**

Victoria represents a wonderful case study of a fulfilling career in the food sector. She started as a patisserie assistant and was supported to complete a NVQ qualification in Retail Skills. Throughout this period, she expanded her networks and eventually moved into the hospitality sector, where she planned, supported, and catered for corporate events.

She then returned to retail, joining Sainsbury's, where she has since been promoted to store manager, taking on increasing responsibility. Victoria is excited to be a role model for other colleagues and is developing her skills to prepare for more senior roles and in time, to be ready for a regional manager position.

Victoria said, 'Having the food sector at the heart of my career has given me the opportunity to have a very varied and fulfilling career, allowing me to work with my strengths and passion so that I can deliver.'

Source: Sainsbury's

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14 - The Times Top 100 Graduate Employers 2020-2021
15 - AHDB – Consumer priorities when purchasing food report 2020
16 - Food and drink industry - Facts and stats | The Food & Drink
Federation (fdf.org.uk)
17 - Building a fair education for all | Teach First
18 - Police Jobs | Police Graduate Scheme | POLICE NOW
19 - NCS | No We Can | National Citizen Service (wearencs.com)
20 - DofE - The Duke of Edinburgh's Award
21 - Feeding Britain's Future - Volunteer in schools (igd.com)

A more productive, highly skilled food and drink sector

promote the sector, its opportunities, and value to UK society. Additionally, the Careers and Enterprise Company (CEC) – the national, government-backed body connecting businesses and education providers – already work closely with IGD and many food and drink businesses. The sector could make greater use of this existing infrastructure to leverage networks and communication channels.

The food and drink sector are determined to offer great career progression opportunities to all. Initiatives to support this include introducing accessible diversity and inclusion toolkits to provide best practice support to all companies, particularly for SMEs. Companies adopting these strategies should be formally recognised by the sector and the government as best practice leaders. Larger companies should also ensure there is strong female and ethnic minority representation in their businesses and on their boards. To provide cohesion through this approach, the sector will consider following the template of the BRC's Better Jobs Diversity and Inclusion Charter[22], which already has 60 retailers signed on, as well as the Tech Talent Charter[23], voluntary schemes backed by the UK Government, where signatories pledge to share data, best practice, and recognition on this agenda.

Historically some of the gaps in our workforce, especially seasonal and temporary work, have been filled by migrant workers, predominantly from the EU. The food and drink sector however recognises that access to migrant labour has now changed and its focus is to build a resilient UK skills pipeline and look to mechanisation and automation to end the reliance on low skilled labour. However, this is a transition that will take time and the UK continues to need to produce food. Chronic labour shortages as a result of an ageing workforce, low levels of unemployment, a reduction in free movement of people and unprecedented disruption of the Covid-19 pandemic are impacting the production, quality and just in time delivery of produce. These impacts are also rippling out across the supply chain and starting to impact consumers with reduced availability of products, potential food price inflation, concerns around animal welfare and longer-term environmental impacts. Ensuring the sector continues to have access to a pipeline of talent at all skills levels is critical. The immigration system therefore needs to allow for continued recruitment in the short term for specialist or seasonal roles, such as HGV drivers and butchers. This short-term response will enable the sector to work with Government over the medium term on a range of other measures around skills and employment to effectively recruit more locally.

We will achieve this vision by:

1. Developing and leading an industry campaign that champions 'Great British' Food and Drink careers, including exploring a graduate scheme to attract new entrants at a local level who are inspired by our vision that provides the country and the world with delicious, healthy, sustainable and affordable food.

2. Replacing the current Apprenticeship Levy with a comprehensive skills levy to provide the flexibility needed to enhance skills across the workforce from new entrants to those already employed.

3. Building on the Lifetime Skills Guarantee, alongside supporting the take up of T-Levels through industry placements and a greater focus on STEM subjects in the higher education system, including on food topics.

4. Introducing diversity and inclusion toolkits that can be used by SMEs. This includes considering a 'charter' on best practice for the industry, alongside a focus on ensuring large companies have strong female and ethnic minority representation in their businesses and on their boards.

For this vision to be achieved, industry and government should strive to:

- Increase the GVA generated by food and drink by a third by 2030, which is more than the average 28% growth rate in the past decade.

- Provide the resources to embed, attract and skill more people throughout the food and drink sector whilst providing additional resilience through a flexible and responsive immigration system that ensures vital labour markets needs can be met.

- Routinely offer the opportunity for everyone in the industry to gain a qualification by 2030 so the workforce and industry has the skills needed for digitalisation, decarbonisation, sustainability, and the circular economy.

- Reverse the trend of the decline of apprenticeship starts from almost 50,000 in 2015-16 to just over 30,000 in 2017-18.

- Reflect the diversity of the country, including at senior levels of management and in the board room in the food and drink sector.

22 - Diversity & Inclusion Charter (brc.org.uk)
23 - HOME - Tech Talent Charter

Case Study: **Sue Freestone –** a 'covid hero' awarded an MBE from the Queen's Birthday Honours List

Sue Freestone was recognised by HM Queen for her selfless work ethic in keeping the nation fed and baking amidst the pandemic. Sue worked for Allinson's Flour Mill, the UK's largest supplier of packed flour into the retail market.

As well as being PA to the Management Team, Sue was the 'go to' person for the site, from HR support to finance, the true glue that helped keep the Mill going.

The lockdown caused a huge surge in home baking, with demand for flour in supermarkets practically doubling overnight.

Due to retire in May after 31 years of dedicated service, Sue made the brave and selfless decision to stay on at the Stortford site to support the flour mill and her colleagues during such a busy time. She also supported colleagues who were forced off site, including those shielding, helping them stay in touch.

Sue finally earned her retirement in December 2020, with her work earning her an MBE in the Queen's Birthday honest list in 2021 for services to the food supply chain.

The Team at Allinson's, and the wider Silver Spoon company (of which Allinson's is part) are extraordinarily proud of Sue, where she exemplified the hard work of so many in the industry to keep the nation fed during a time of crisis.

Source: Associated British Food

Case Study: **Saputo Dairy - Abigail Matthews** – Dairy Technologist

Abigail is part of the Eden Dairy Trainee Scheme, which provides talented young people a training programme in the food and drink industry, including academic learning for a Foundation Degree in Food Studies and hands on practice on site. After the programme, trainees receive opportunities to go straight into industry, including in management, research and development, engineering, and sales.

Asked about what advice Abigail would give to those interested in a career in this sector, she said 'Do it, it opens so many doors and you learn things you never thought you would. Just do what you love!'

Source: Tasty Careers

Case Study: **Tech Talent**

The Tech Talent Charter (TTC) is an industry-led body backed by the Department for Digital, Culture, Media and Sport (DCMS). TTC asked relevant companies within the UK technology sector to sign up to their charter, which includes commitments to push for diversity and inclusion in their companies, provide anonymised information on their recruitment practices, including their gender recruitment pipeline and to share best practice. TTC also provides diversity and inclusion training, hosts thought leadership events, hiring toolkits, and an annual evidence report. Since the launch in 2017, they have secured 418 companies, covering over 160,000 people, about 14% of the tech workforce. 82% of charter members have gender as one of their top priorities in recruitment.

Source: Tech Talent Charter

A food and drink sector that is more innovative

By 2030, the sector will be more productive, as it unlocks the potential of "Industry 4.0", and be more innovative, enabling it to generate more value for what it produces. This is important economically for businesses, but also reduces the environmental footprint of food, providing a wider good to society. Private and public sector R&D will have increased. Obstacles for innovation will have been tackled, in particular for SMEs within the sector. Effective collaboration and knowledge transfer between the sector and academic institutions will be commonplace.

Where we are today

Reaching this vision requires learning from the best of what is happening already and spreading that best practice widely across the whole of the food and drink industry. It will include embracing the rise of e-commerce for groceries and meal delivery, and innovations in food science, like alternative proteins and gene-editing that increase resilience in livestock and crops. To deliver this requires us to do three things. The first is to tackle the challenge of under-investment in R&D in certain parts of the sector. The second is to ensure the research coming out of our brilliant universities can be swiftly commercialised. The third is to ensure that businesses of all shapes and sizes are able to access innovative technologies. To provide insight, measure and drive better productivity, we need a more joined-up approach on how we obtain, process and use data.

The roadmap to 2030

Technology is opening new possibilities for the food and drink sector. The government's Made Smarter Review points to a potential, cumulative, £55.8bn of additional value to the food and drink manufacturing sector through the adoption of known digital technology between 2017 and 2027[24]. Innocent Drinks have shown one approach, with their commitment to developing advanced carbon neutral production facilities.

Similarly, in the hospitality sector, food apps are transforming how we buy prepared meals, with investment in these apps doubling between 2018 and 2019[25]. The pace of change has only quickened during lockdown. Retailers have also adopted new e-commerce platforms to enable the sale of produce and social media marketing has created new sales channels.

In the agricultural sector, tech is providing new tools for driving resource efficiency and production of consistently high-quality, high yielding crops. The food manufacturing sector is the UK's second biggest investor in robotics. The vertical farming sector, with produce grown in optimised environments, could be worth £9bn by the middle of the decade[26].

The UK is developing expertise in alternative proteins but will need to scale up in an increasingly competitive global sector. Therefore, we should have a concerted strategy to establish the UK as a key location for developers and producers of alternative proteins for food and animal feed, including government support to explore the development of a commercial cluster.

The UK Chancellor's introduction of the investment super-deduction[27] is very welcome, but its impact will be more transformative if it is extended beyond 2023. Alongside this, there is a strong case for a food and drink sector "Build for the Future" scheme. One of the scheme's objectives should be to support greater mechanisation in the parts of the supply chain that have been reliant on low skilled migrant labour. There may also be a case for including a UK government-backed technology-loaning scheme from suppliers to help de-risk expensive hardware investments and promote novel solutions, especially for smaller companies, and a scrappage scheme to incentivise the replacement of older technology. Investors should also be encouraged into the sector, building on the existing Seed Enterprise Investment Scheme or Enterprise Investment Scheme.

The sector needs to tap into the government's investment pledges on innovation, with research and development (R&D) spending set to grow to 2.4% of GDP by 2027, which should see an increase in annual R&D spending from just over £10bn in 2021 to £22bn by 2027[28]. The sector also welcomes DEFRA's agricultural R&D Roadmap[29] and the new Advanced Research & Invention Agency (ARIA)[30].

At present, the UK food and drink sector is not getting its share of government R&D spending. The 3% of total R&D spending going into food and drink is misaligned with the sector's

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24 - Made Smarter Review 2017
25 - https://research.agfunder.com/2020/2020-european-agri-foodtech-investment-report.pdf
26 - Vertical Farming Market by Component, Structure and Growth Mechanism: Global Opportunity Analysis and Industry Forecast, 2019-2026
27 - Super_deduction_factsheet.pdf (publishing.service.gov.uk)

28 - Post-pandemic economic growth: Industrial policy in the UK - Business, Energy and Industrial Strategy Committee - House of Commons (parliament.uk)
29 - Government unveils path to sustainable farming from 2021 - GOV.UK (www.gov.uk)
30 - Advanced Research and Invention Agency (ARIA): policy statement - GOV.UK (www.gov.uk)

significant contribution to the economy. We are therefore missing the opportunity to further add economic value and contribute to public policy goals on health, sustainability, and levelling up economic opportunities. The UK Government should rethink its approach, while the sector itself needs to get better at making its case to key stakeholders and increase the number of champions it has to ensure its voice is represented in decision-making. This includes maximising the opportunities in the UK Government's Innovation Strategy, having more advocates in funding committees and having a strong voice for the sector in UKRI, Innovate UK and on the research councils. We also support UKRI introducing a £1 bn 'Better Food Challenge Fund', as proposed by Henry Dimbleby's report. The sector needs to become more competitive in accessing these public sector R&D bids by encouraging the formation of more consortiums and encouraging data sharing among partners.

To become more competitive in obtaining R&D funding, we need more data to work with. The sector needs to engage with the UK Government's National Data Strategy[31] with the aim of better utilising data to improve decision making and unlocking productivity gains. Better access and use of data can be a powerful tool for companies in making good business decisions. We would also encourage further support for the Feed UK pilot project, which is developing a 'live' digital twin of the UK food and drink system. This programme should ideally be overseen by an overarching body, such as the UK Statistics Authority or the ONS, given the interrelated nature of the food system.

In that same spirit, we welcome Henry Dimbleby's report recommendation of a 'National Food System Data programme'

to identify data gaps and collect and share data into useable information dashboards to inform businesses on planning and government on policy.

To further encourage innovation, we need to improve on the existing patchwork of UK government support schemes to create a truly supportive investment, tax, and regulatory environment. The sector has also faced rapid regulatory change due to the pandemic. As we move to the next phase of the recovery, the government should be careful not to overly burden the sector with red tape, and therefore we support the concept of a 'one in, two out' regulation rule, where for every additional regulation, two need to be removed. This approach should be sector specific, truly embedded and properly enforced to deliver a business environment that encourages greater investment and uptake in innovation. In other sectors, such as in fin-tech, they are making good use of business accelerators and incubators with regulatory 'sandboxes'[32]. These allow for quick testing of novel regulations to encourage innovation for both product and policy. Government should look at applying this approach to the food and drink sector. We welcome for instance the open approach in the consultation in relation to gene editing, which could result in healthier or more resilient crops and ultimately greater consumer choice.

Reducing red tape to encourage innovation is important, however, as we produce more innovative food, we will also need to consider the needs of consumers. Therefore, any approach on innovative food, including on gene edited products or alternative proteins, demands rigorous standards, transparency and a clear product advantage to earn the trust of consumers.

Case Study: Innocent Drinks

Innocent Drinks, the company famous for its smoothies, are developing a carbon neutral integrated blending and filling facility, called 'The Blender' in the port of Rotterdam. In partnership with BFP Ltd, they are creating a juice factory with sustainability at the heart of its design, including a focus on reducing energy consumption, modern building techniques, high integration of technology to enable automation and the minimisation of waste materials. It aims to be the most technologically advanced facility of its kind and not only will it be sustainable, but there is also the added benefit of having a very efficient operating cost.

Source: Innocent Drinks

31 - National Data Strategy - GOV.UK (www.gov.uk)
32 - FCA and City of London Corporation pilot digital sandbox (finextra.com)

A food and drink sector that is more innovative

Global Leaders in Biotechnology

Biotechnology can be a powerful force in helping us develop a more sustainable food chain and bring global recognition for our scientific expertise. To fully exploit our potential, we need a range of regulatory frameworks that support and encourage emerging technologies, whilst maintaining food safety and consumer confidence. Reducing unnecessary regulatory barriers can help ensure smaller companies can also thrive and compete against larger organisations.

As an example, gene editing techniques can bring many benefits to the global agri-food system. Gene editing techniques can be part of the solution to help create a more sustainable food system in the UK, helping to ensure food security for the future with the possibility of improving crop yields and preventing crop failures. Through the food chain, they can also help reduce food waste by reducing degradation and browning of foods, increasing the shelf life and longevity of products and reducing food waste. They could also be used to improve the nutritional profile and flavour of food.

DEFRA has recently consulted on the most appropriate regulatory framework for gene editing, to ensure food safety while at the same time, not blocking innovation.

To unlock more private sector R&D, both from domestic companies and prospective inward investors, we should explore ways to make it easier to apply for research and tax credits. For instance, to support innovation in the food and drink sector, the definitions and categories of valid R&D expenditure should be reviewed to make them more accessible.

Funding is a barrier to innovation in food and drink, especially for a fragmented sector with many companies working to low margins. To help food and drink companies make progress on innovative products, the government should consider having an 'Export Finance' model for innovation. This could be for key 'bottleneck' phases of research, to ensure small-scale, proven innovations are not lost due to a lack of finance. This could include greater collaboration between the sector and the British Business Bank to support SMEs in the sector in receiving financing, when commercial lending is not a valid option.

We need to continue to support the valuable work that organisations such as AHDB, BRC and FDF are playing as they introduce 'one stop shop' gateways for SMEs in agriculture and manufacturing aimed at helping companies navigate the complex world of innovation funding. These can demonstrate the possibilities to SMEs and showcase new technologies and methods to boost competitiveness. Another potential role for the gateways is catalysing collaboration between SMEs, for instance by promoting 'research clubs' to bring together groups of businesses to bid together for funding.

Building on the productivity and skills chapter, an innovative culture cannot happen without motivated people. We need to create opportunities for people to learn from the sector. At the entry level, the sector should provide more content for institutions as part of the education process: this include partnering with computer science programmes to organise 'Agri-Tech hackathons' focused on agricultural themes. This could involve setting a task (for example, creating an app solution to monitor plant growth), inviting talented people to work or 'hack' a solution, then pitching after a day or two, before offering recognition, awards and funding for winners to iterate further with the solution.

This could also be expanded to leasing 'demo farms' to experiment new farming methods or provide seeds and tools to institutions to test and sponsor new concepts such as vertical farming. We should also look at more informal measures, such as ensuring food and drink representation for coding bootcamps, such as General Assembly, Makers Academy and Flat Iron, which train coders from scratch within three months, and then place them into jobs.

At the advanced end, we need to encourage more collaboration and sharing knowledge between academia and practitioners from the whole food chain. This includes encouraging the establishment of food and drink centres at leading universities and building on existing post-doctoral placement programmes seen in some sectors and to scale this up, building more partnerships, and increasing the feedback loop between research and the private sector. This could also involve encouraging UKRI to invest in more workplace research fellowships to drive capability and support innovation.

So we will achieve this vision by:

1. Boosting capital investment needed for the "Industry 4.0" transition (greater digitalisation and connectivity) of the UK food and drink sector. The government's super deduction policy should be extended beyond 2023 to lay the firm foundations of a decade of investment. Alongside this, a "Build for the Future" support programme from the government should be implemented to ensure greater investment in plant and machinery, de-risking investment decisions particularly for smaller businesses, maximising the opportunities of digitalisation and spread mechanisation, particularly where there has been an historic reliance on migrant labour.

2. Ensuring the sector gets its fair share of innovation funding from government by maximising the opportunities in the UK Government's Innovation Strategy, reflecting the importance of the sector and its centrality to public policy - including by ensuring food and drink sector representation on funding committees.

3. Unlocking more private investment in R&D – including pro-investment tax and regulatory policies, such as changes to R&D tax credits and increased capital allowances.

4. Streamlining and improving the accessibility of innovation, including through an innovation finance scheme modelled on export finance, a government-backed loan scheme for advanced hardware for smaller businesses and a strategy on supporting the development of alternative proteins.

5. Following up with the government's National Data Strategy by establishing "best practice" models for data sharing, which the government and the sector can use to identify drags on productivity and inform evidence-based policymaking, ideally through an overarching body such as the UK Statistics Authority or the ONS.

6. Supporting industry innovation gateways in agriculture (AHDB), manufacturing (FDF) and retail (BRC) to help SMEs access innovation expertise, unlock funding and de-risk investments through demonstrator hubs, with a particular emphasis on improving resource use efficiency, reducing waste, and improving digital connectivity.

7. Promoting a more innovative culture, including encouraging the establishment of people exchange and a secondment programme between industry and academia, and the creation of new food and drink innovation centres at universities, in partnership with industry.

For this vision to be achieved, industry and government should strive to:

- Double the industry's R&D spend by 2027.
- Increase the amount of R&D funding towards SMEs for agriculture and food and drink manufacturing.
- Increase consumer support for innovative food and drink products.
- Deploy digital technology as proposed by the government's Made Smarter review to create £55 bn of extra value for the sector cumulatively in the next decade.

A food and drink sector that trades with ease at home and abroad

In 2030, more food and drink will be exported, and at home, more demand will be met. For exporters, access to new markets will have improved, with frictions with the EU under the Trade and Cooperation Agreement (TCA) more streamlined and a revamped, well-invested, cross-UK trade promotion strategy for companies to make use of. SMEs in particular will find it much easier to export, and strong, diversified trade links will ensure resilient supply to consumers in the UK.

Where we are today

Food and drink exports from the UK have many success stories. Our produce is some of the finest in the world and valued as far apart as Beijing and Berlin. Being a global trade and logistics hub, the UK has significant strengths as a location for producing food and drink. However, the value of our food and drink exports, with the exception of whisky, is relatively small compared to many other countries. Food and drink companies that export are a small minority of the total and have the potential to produce and sell more abroad and at home.

Roadmap to 2030

Industry-government partnerships are key to boosting the food and drink trade. Across the globe, we need proactive commercial diplomacy that is informed by and supported by industry.

We should be ambitious to export more. UK food and drink are valued and prized around the world. It is produced to high standards rather than as an industrial commodity. But the farmers and SMEs producing it often struggle to overcome the obstacles to export. A large number of SMEs that make up our farming and producing sector are unfamiliar with the complex checks and formalities required to make a success of exporting. Similarly, the opportunity cost of seeking out speculative new markets, combined with the economic risk it represents to a business operating on small margins, means exporting is effectively left to a few large companies with the capacity to minimise the risk of it going wrong.

The UK needs to prioritise removing those obstacles and back exporters and potential exporters. The sector needs support from the government: to increase access to markets by reducing the red tape required to access them, to help them navigate the remaining checks and procedures to export, and to promote British products – building on our existing brand strength.

Industry members of the Food and Drink Sector Council spearheaded proposals on trade exports, which has since been backed by the Trade and Agriculture Commission report[33], forming the backbone of how the UK government can do this, with three recommendations highlighted here:

The first is the creation of an agri-food export body for England, which would then work alongside a new food and drink export council, the chairmanship of which would rotate between England, Scotland, Wales, and Northern Ireland. This body would foster a close partnership between industry and government, delivering a truly joined-up and collaborative approach across all four nations, provide better value for money for investments in export promotion and inform trade negotiations, making sure we reduce the knowledge gap that exists due to only recently having full control of trade policy following the UK's departure from the European Union.

The second is using the UK's formidable diplomatic network to pursue a global approach to higher standards in food production, covering sustainability, safety, animal welfare, labour rights and the use of pesticides and fertilisers. These would form the basis of an offer to countries with which we seek FTAs: where equivalence is demonstrated for these standards; there would be zero tariffs and zero quotas in return. A level playing field in terms of standards is vital to assure UK consumers of the high-quality nature of the foods they are buying wherever they are sourced from in the world.

The third recommendation is the development of an agri-food trade strategy aligned with the National Food Strategy. At the centre of this is a belief that liberalised trade, underpinned by high standards, will provide consumers with the best outcomes from the UK's new trade policy. The strategy should include ways to improve the competitiveness of agri-food exporters, which will in turn also increase investment and develop high skilled jobs, taking full advantage of the UK's world leading export and logistics hub. The strategy should also set out a clear plan as to how the UK Government and industry will work

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33 - Trade and Agriculture Commission (TAC) - GOV.UK (www.gov.uk)

together to ensure producers and consumers derive the full benefits of preferential trade agreements.

These recommendations apply to trade with all our partners, whether or not an FTA is already in place, so this approach is as much about reducing frictions in trade with the EU under the TCA as it is about opening up new markets with the United States, New Zealand or the wider membership of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP).

The benefit of this approach is not just confined to exports. Reduced frictions for importers into the UK benefit British consumers and businesses in the food and drink sector. For example, chocolate, one of our top export products, is wholly reliant on imported cocoa, and everyone's favourite cup of tea is drawn from imported tea leaves. Additionally, the FDSC recently published a report[34] that identified the need for a review to analyse imports to identify any opportunities to substitute them with domestic production or onshoring opportunities work that is now underway. Greater choice for consumers is a good in and of itself if supported by a baseline of high standards, but it also means our sector is more resilient in the event of crop failures (such as 2020's poor wheat harvest[35]), or rapid changes in demand, as seen when the pandemic struck. Having a diverse range of suppliers, both domestic and foreign, helps maintain the resilience of our food supply lines – with a degree of re-shoring production and import substitution potentially playing a resilience-boosting role where the market incentives are in place.

The UK food and drink sector are determined to grasp the opportunities of more open trade. It wants to seek out new export markets, build its share of the home market and welcomes consumers having the greater choice that can come from trade. It will require work and understanding between industry and the UK Government to do so.

So we will achieve this vision by:

1. Maintaining strong support for high standards of food production in the UK and the integrity of raw material inputs.

2. Engaging with the UK Government to explain and reduce frictions in UK-EU trade under the TCA commensurate with our own trade or food values.

3. Improving SME's ability to export and to help them identify growth opportunities overseas.

4. Ensuring the UK Government recognises the strategic importance of imports for GVA and to enable production for our key export markets (such as tea leaves for tea).

5. Creating a 'Team UK' approach to trade priorities and promotion so governments in London, Edinburgh, Cardiff, and Belfast all pull together to support English, Scottish, Welsh and Northern Irish exporters.

6. Continuing to support the other recommendations of the Trade and Agriculture Commission.

For this vision to be achieved, industry and government should strive to:

- Increase the value of exports, including by at least matching the expected increase in global demand with UK supply, with global food production needing to increase by 35% by 2030 and double by 2050[36].

- Increase the proportion of food and drink businesses exporting from the current 17% level.

- Increase the proportion of SMEs exporting, from the current base of just 1% of exporting businesses account for 52.5% of the UK's total food and drink exports[37].

34 - FDSC Transition Working Group 'Building a Thriving Food and Drink Sector', July 2021
35 - Worst UK wheat harvest in 40 years prompts flour price hike fears | UK News | Sky News
36 - Feeding 9 Billion | National Geographic
37 - DEFRA analysis of HMRC/ONS data

A sustainable food and drink sector for the future

In 2030, the UK's food and drink sector will be synonymous with sustainability and decarbonisation, from soil health to reducing packaging use and progress to net-zero. Soil, water and climate are elemental materials for food and drink. Their sustainability is in everyone's self-interest, as well as what is increasingly expected by consumers and investors.

Where we are today

Sustainability is increasingly woven into the fabric of how our sector produces, but we recognise more needs to be done: further reducing food and packaging waste, cutting emissions, maintaining and improving soil quality, and using water efficiently.

The roadmap to 2030

The importance of biodiversity is central to the health and strength of the natural environment in which we grow and raise our food. The sector supports the government's aspiration agreed at the G7 by the world's biggest economies to reverse biodiversity loss by 2030[38]. To help with this goal, clear agreed definitions and measures on biodiversity need to be set within the industry to reverse biodiversity loss in the UK. The Environmental Land Management (ELM) scheme should also be a central policy for driving improvements in this regard.

With the UN calculating that one third of food produced for human consumption is going to waste[39], we need to go further on reducing food waste and fostering resource efficiency for a truly circular economy which limits our impact on the natural environment. Each part of the complex supply chain has a role to play.

Manufacturers and retailers have already responded to consumer demand by reducing plastic packaging, preventing millions of tonnes of packaging from entering circulation. They continue to make progress, and the UK government has a role to play in incentivising deposit return schemes, recycling, and reducing contributions to landfill. We also recognise the government is reforming the packaging waste framework through the Extended Producer Responsibility (EPR) system. Any future scheme must be well designed and cost-efficient to act as an enabler for increased investment in recycling infrastructure and avoid inflationary costs for businesses or consumers.

On food waste, we should target sending zero waste to landfill. Energy generation via biogas from waste should be incentivised. Striking the right balance between waste-minimising packaging and reduced plastic use will ensure good intentions do not create unintended consequences for food waste. Labelling policy – including the use of best-before dates – needs to be considered as part of this, given the burden it is expected to carry in pursuing the policy goals of improving nutrition, denoting origin, marking the method of production and conveying important safety information. We also expect greater use of labelling in the coming decade, including via digital means to inform consumers on how environmentally sustainable the product is. Critical to this are the development of metrics specifically around greenhouse gas emissions (GHG) emissions that can be accessed through the National Food System Data programme as proposed in the National Food Strategy. Data

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Case Study: **Food and Drink Federation –** Food Waste Case Study

fdf passionate about food & drink

On food waste, the sector has already made encouraging progress, with the Food and Drink Federation (FDF) members reducing food waste by over 30% on a per capita basis since 2011. In one year alone, between 2018 and 2019, 180,000 tons of food was saved from becoming waste in the food and drink manufacturing sector.

A key approach is through setting food waste production targets in individual operations and reporting it on an annual basis. Members have also been engaging with their suppliers through their 'Target, Measure and Act' initiative to tackle food surplus and waste. Companies and their suppliers have the space to act on issues that are relevant and proportionate to their businesses, rather than being forced into very narrow prescribed methods which may not work for their businesses. FDF and its members have a goal of reducing UK food waste by a further 20% by 2025 per capita against a 2015 baseline.

Source: FDF

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38 - UK secures historic G7 commitments to tackle climate change and halt biodiversity loss by 2030 - G7 UK Presidency 2021
39 - Food Loss and Food Waste | FAO | Food and Agriculture Organization of the United Nations

consistency alongside an alignment on methodologies will be essential for consumers to make like for like comparisons, as well as for demonstrating progress on reducing carbon footprints.

On reforming water management, including resource recovery by promoting grey water use, there is an opportunity to both reduce flooding and improve resilience. Three quarters of fruits and vegetables, which possess a high-water content, are derived from countries with water scarcity, while in the UK, horticulture accounts for just 2% of water supply[40]. More investment via agricultural support schemes such as ELMs needs to flow to help the domestic horticultural sector, where margins are slim, to acquire the hardware needed for irrigation technology, water collection systems, poly tunnels and farm reservoirs to make the most of this opportunity.

We therefore call for an independent review of the existing regulatory framework to look at water availability and quality. Ultimately the review should ask whether the framework is fit for purpose and whether it is enforceable.

Better water management will also improve soil health. 95% of food is directly or indirectly produced on soil[41] and reversing the trend of soil degradation will boost our productivity and environmental sustainability. Limiting runoff of water from fields into waterways protects nutrients in soil as well as preserving the health of our rivers. Measuring this is essential and we therefore support the Environment Agency and the Soil Association's efforts to align on one source of truth on soil metrics. This should form part of an approach for more support, research and advocacy for regenerative farming strategies and techniques.

At the root of our commitment to sustainability is a belief that the increase in global temperatures needs to be limited to 1.5 degrees above pre-industrial levels, if we are to protect future generations from the worst consequences of climate change. The food and drink industry fully acknowledge its responsibility to make significant progress towards net-zero in the decade ahead, whether by reducing emissions in agriculture and land use, or decarbonising manufacturing, distribution, retail and hospitality. This includes solutions that cut across the food chain, such as decarbonising heat by achieving better energy efficiency and using more renewable energy. The industry will also take an interest in the UK Government's upcoming hydrogen strategy as one path towards natural gas replacement as a source of electricity.

Decarbonisation is not without its challenges. But the UK's success since 1990 in cutting emissions by 38% offers[42] an approach that can be adopted as we look to the 2040 target. It is a model that uses a range of policy tools: from incentivising the use of low carbon technologies (such as contracts for difference in power renewable power generation); regulation and standard setting (such as ending the use of coal in power generation and setting an end date for the sale of internal combustion engine cars); changing consumer use (such as smart meters and home energy efficiency measures); and the use of carbon pricing via the UK's Emissions Trading Scheme to encourage big businesses in highly emitting sectors to decarbonise.

Polling shows strong opposition to the introduction of carbon meat taxes and the UK should avoid taking any unilateral measures that would hike UK costs and drive food production

Case Study: **NFU –** Making the Case for an integrated water management strategy

The NFU have been making the case on how water management needs to be managed holistically. This means improving the monitoring and measuring of water and promoting innovative techniques to reduce demand and reuse 'grey' water, both at a farm and catchment scale.
The NFU wants an integrated water management strategy to deliver optimal use of water across the agricultural sector, including the capture and storage of abstracted water when it is in surplus following flooding and wet weather events. Water stored in this way can then be used in agricultural production during times of hot and dry weather.
The NFU are therefore encouraging the formation of 'water management' or abstractor groups to coordinate the way water is managed in local catchments, develop alternative water supplies if necessary and drive down water waste at a local level. This includes inviting other sectors to work with groups of farmers and growers. It should create opportunities to promote multi-sector schemes where farmers, water companies, energy companies and others can share the benefits of new and improved facilities.

Source: NFU

40 - https://www.nfuonline.com/nfu-online/news/nfu-reports/integrated-water-management/
41 - Soil - Sustainable Food Trust - Sustainable Food Trust
42 - Analysis: Why the UK's CO2 emissions have fallen 38% since 1990 | Carbon Brief

A sustainable food and drink sector for the future

offshore to less sustainable, higher carbon emitting producers. Instead, the UK approach should combine support and incentives to farmers to reduce the carbon impact of farming and extend their role in providing carbon offsets. The key policy tool for this should be an ELM scheme with sustainable farming embedded in its design and a clear commitment by the government to sustain the level of support. Long term stability and predictability in the economic outlook is key to business and investor confidence, so we support Henry Dimbleby's recommendation to guarantee the budget for agricultural support payments to at least 2029.

This will provide a pathway for farmers and horticulturalists to plan with confidence and move towards less carbon-intensive forms of feed, better use of fertilisers, development of bio-energy systems, and greater use of precision farming and energy saving mechanisms. The UK should also continue to develop its biotechnology research capabilities, ensuring that new breeding technologies like gene editing are embraced to help deliver low carbon quality crops and livestock.

This should be part of a wider strategy that looks at all the measures available to reduce the sector's emissions, in the form of a food and drink decarbonisation strategy (similar to the decarbonisation strategies for heat and buildings and for industry). The wider food chain under the auspices of the FDSC Net Zero working group will draw upon the NFU, FDF and BRC Net-Zero roadmaps[43][44] as a starting point. It is also incumbent on the government and industry to follow through on its commitments on skills and innovations (elsewhere in this paper) to achieve the goal of decarbonising by 2040, with sufficient progress made by 2030.

So we will achieve this vision by:

1. Reducing emissions from producing food and drink in the UK by adopting new techniques and technologies and using renewable energy.

2. Ensuring agriculture support schemes like ELM link to and support sustainable food production and net-zero for agriculture. As recommended by the Henry Dimbleby report, the government should maintain the value of support payments to farmers through the whole decade.

3. Introducing support mechanisms and regulatory changes to enable the sector to reach net-zero by 2040 and not be limited to fiscal measures such as taxation.

4. Supporting measures to build a circular economy, including an independent review on water management framework.

For this vision to be achieved, industry and government should strive to:

- Achieve sectoral emissions reductions target for 2030 to indicate pathway to 2040 net-zero target.
- Improve our water use and improve soil health by 2030.
- As a priority, establish clear agreed definitions and measures on biodiversity, as the first step in a decade of progress to reverse biodiversity loss in the UK.
- Have zero food waste sent to landfill by 2030.
- Transform our performance on minimising waste in packaging and maximising recycling by 2030.

43 - Climate Roadmap (brc.org.uk) 44 - 'Achieving Net Zero: Farming's 2040 Goal, NFU

Case Study: **Morrisons –** Greener Farming Case Study

Morrisons plans to be the first supermarket to be supplied directly by all net-zero UK farms by 2030. Morrisons expects to have the first net-zero carbon eggs in store in 2022, followed by fruit, vegetables, pork, and beef by 2025.

Morrisons will achieve this by using low food-mile and low carbon footprint feed, rearing different animal breeds, using renewable energy and low emission housing and using water and fertilisers more efficiently. Farms supplying Morrisons will also offset carbon emissions by planting grasslands and trees, restoring peatland and seeding hedgerows.

The work with farmer suppliers' forms part of Morrisons overall commitment to the environment. In its own Scope 1 and 2 emissions, Morrisons has already reduced carbon production by 28% in 2019 alone and is on target to further reduce its emissions by 33% in 2025 and 53% by 2030. Morrisons' wider business plan is to become net-zero for carbon emissions by 2040.

Source: Morrisons

A food and drink sector that provides healthy and affordable food for all

By 2030 we will have a food culture that fosters enjoyable, nutritious and healthier eating. The stronger food culture starts at school, where we learn more about food and nutrition, how and where food is produced and the skills to cook. As consumers, we are empowered to make good choices, with affordable, healthier choices available to all. Digital food information is personalised for consumers to help them make informed healthier choices to suit their lifestyles and preferences. What makes for good eating - as demonstrated by the Eatwell Guide - is common knowledge and reflected in the average shopping basket. Even more healthier choices will be available through reformulation, smaller portions sizes, clearer labelling and information for consumers, and new product development to help reduce excess intakes of sugars, fat and salt, and increase fibre, fruits and vegetables, and micronutrients. We will have helped turn the tide on obesity, while continuing to ensure that good, delicious food is affordable for everyone in the UK, and recognising that nutritional needs vary as people age. Our food safety standards will continue to be world class.

Where we are today

The UK has some of the most affordable food prices in Europe. There are more choices available than ever before. In an age of busy lives, food is widely available and convenient. Food safety, and trust in it, is high in the UK.

The food system has successfully responded to the major food challenges of the last 70 years to feed a fast-growing global population. Throughout this period, consumer demand and government policy have prioritised food and drink that is highly affordable, widely available and great tasting. The post-war food industry has been built in response to these priorities and market signals.

However, while the food system, and the food industry, have successfully provided affordable and desirable food, obesity has emerged as a serious issue. Today, obesity affects millions of people in the UK, bringing damaging consequences for health and the quality of life for the obese, along with increasing demands on the NHS. The industry has responded, with increasingly healthier options for consumers and is supportive of evidence based and proportionate policies where the UK Government and industry can work in collaboration. Nevertheless, tackling obesity remains a priority for the decade ahead.

The starting point is that most of us primarily want the food that we consume to taste great. The challenge is combining the great taste we want with the healthier eating we need. AHDB consumer research shows that taste is the largest driver of consumption, although there is also emerging willingness to seek food with strong credentials across health, environment, and welfare. And while consumer research, by the IGD, YouGov and others, suggests some willingness to change, most believe that broadly our existing diet and consumption are healthy[45] and sustainable.

The roadmap to 2030

The UK needs a holistic strategy to improve nutrition and food choices. Over the last 20 years, expert studies have defined obesity as a complex, systemic challenge requiring systemic solutions. Tackling obesity requires joined-up changes at multiple levels: personal, family, community and national. It also requires a partnership between government, science, business and civil society. The complex and interconnected causes of obesity make it very difficult to reduce obesity rates in practice. There has been a range of government initiatives across different areas recently, however, more could be done to ensure a truly holistic strategy.

The UK's goal should be to help people make better choices and making better choices available to them. It needs to be pursued consistently and coherently over the decade ahead, rather than episodically and in a piecemeal fashion. It should be informed by the best possible knowledge, evidence and understanding of *what* we eat, *why* we eat it and *how* change can be delivered – information the food sector is well-placed to provide. Finally, it must be rooted in a national consensus and engagement by all stakeholders.

The existing national health, diet and nutrition surveys all measure the content and the outcomes of diets but provide us with only a limited picture of what is inside the head of the consumer. At the same time, consumer research offers important insights into what consumers want from food,

45 - British people think they are healthy eaters, but their shopping baskets say differently | YouGov

A food and drink sector that provides healthy and affordable food for all

shedding light on the drivers behind food perceptions and decision making to provide solutions that influence consumers without having to preach. We want to work with the UK Government to explore data sharing to help inform public policymaking, but to help us all make better choices, insight on consumers' needs to play a more prominent role in this process.

Obesity is a societal problem, and we should aspire to turn the tide of this in the next decade. As a society, we need to ensure that the research developed from our best minds fully transmits to impacting the food system and the development of new solutions. To that end, the forthcoming UKRI research into transforming UK food systems for health and environment will be instrumental and our industry should partner with Government and academics to deliver this.

Proposals are being made, including by Henry Dimbleby, to introduce food taxes as the primary policy tool for tackling obesity. Our view is that this would be a very blunt instrument which would be unlikely to achieve the desired outcomes of incentivising innovation and changing consumer attitudes and behaviour. Instead, it risks disengaging consumers by stigmatising their choices and increasing prices. And while soft drinks subject to the Soft Drinks Industry Levy have seen successful reformulation, we have seen comparative progress in milk-based drinks with no such levy applied. For many products, such as cakes or biscuit, reformulation and innovation takes time and a tax will not incentivise this complex technical challenge. Our conclusion is that the case has not yet been made that a widespread use of levies and taxes would lead to reformulation, rather than higher prices, often for those least able to afford them.

Locally targeted and collaborative initiatives alongside national and industry action, provide an alternative avenue forward without making food unaffordable.

The Henry programme in Leeds, involving a partnership with the local council to provide intensive support with parents and children, and Amsterdam's multifaceted approach, are trailblazers for regional strategies and should become commonplace across the UK in the decade ahead.

We also should take food education seriously in our schools. Henry Dimbleby's "Eat & Learn" proposals set out a great route forward. This is a crucial foundation of better food culture.

We should build on the use of clear and easy to understand nutrition labelling with digital information. This should enable personalised information for consumers to help them make informed healthier choices to suit their lifestyles and preferences. Knowledge of what makes for healthier eating – as demonstrated by the Eatwell Guide – should be common knowledge. This requires a common effort across governments, the food and drink sector, education, the media and more. And we need to be offering better choices.

The HENRY Programme

The HENRY programme is an education scheme which focusses on parents and carers of the youngest children and poorest families. The programme was developed in Leeds, which has seen 6.4% decline in rates of obesity in reception children over the last 4 years.

The programme takes a holistic approach to health including supporting breast feeding, improving nutrition, emotional well-being, parenting skills, healthy nutrition, oral health and physical activity. It recognises that one size does not fit all – practitioners work in partnership with parents to identify what they are already doing well and the things they would like to change, helping them to develop their own strategies to achieve their goals.
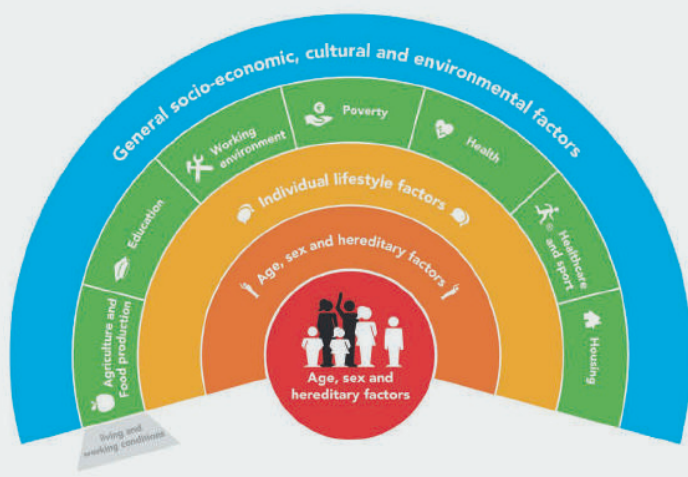
The HENRY approach involves evidence-based interventions, practitioner training and community volunteer initiatives to support families to adopt healthier lifestyles. Family support services include:

- Programmes – healthy pregnancy, healthy start, obesity prevention, weight management, cooking skills
- Workshops – subject specific workshops on a range of topics e.g. breast feeding, weaning, oral health, emotional wellbeing etc.
- Drop in sessions
- Resources – handbooks, story books, DVDs etc.
- Online support

Outcomes from family support services reported on the website include:

- 92% of families are leading healthy or very healthy lifestyles by the end of the Healthy Families programme compared to just 17% at the start
- 75% of families continue to lead healthier lives after HENRY support has finished
- 45% of children are eating 5-a-day by the end of the programme compared with a national average of 19.5%
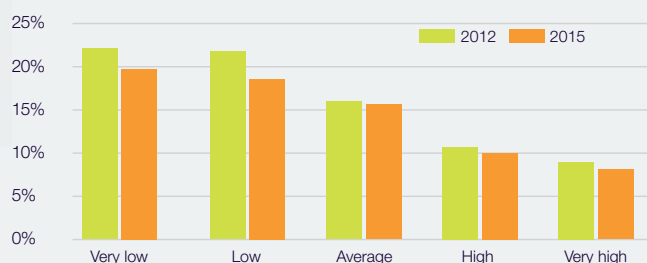
Case Study: Amsterdam

Amsterdam is an example on how public – private partnerships could tackle childhood obesity.

The city authorities provided a framework, with financial support and multi-year targets to empower companies and charities to give services such as welfare, youth care and sports sessions. Interventions include school farms, healthier canteen food, training for new parents, community managers, changes to the food environment, specialist health provision and nutrition learning programmes.

Overweight and obesity amongst children in Amsterdam by socio-economic status

Source: City of Amsterdam

Case Study: Salt Reformulation

The salt reduction programme is widely considered world leading and has delivered great results in reducing salt intakes[1].
The industry has been reducing salt in products for many years, with the Government programme beginning in 2006, and five subsequent revisions to the targets. Within this time there have been substantial reductions to salt in products, coupled with raised consumer awareness of the link between salt intakes and high blood pressure, which has successfully reduced salt intakes by 11% in the last decade[2], although they have remained static since 2014.

It is worth noting that consumer concern regarding levels of salt in food has declined slightly since May 2017[3], with rising concerns around sugar. This highlights the importance of continued government public awareness campaigns, and that holistic messaging on healthy diets, rather than single nutrients, may be more helpful in maintaining dietary changes long term.

[1] Effects of product reformulation on sugar intake and health—a systematic review and meta-analysis
[2] National Diet and Nutrition Survey Assessment of salt intake from urinary sodium in adults (aged 19 to 64 years) in England, 2018 to 2019
[3] FSA Consumer Attitudes tracker

Consumers can strongly value effective signalling "shortcuts" - like "1 of 5 A Day[46 76]" and "high fibre" - we need to devise more of them. Alongside shortcuts, we praise retailers who enable "simple swaps" for healthier alternatives when shopping online and encourage this to be standard practice across the industry. The language we use should be positive, informative and making an appealing offer to the consumer.

Incentives clearly need to play a bigger role in the future in the good choices offered. For example, store cards can be used to nudge people into making healthier choices. The work

being done for the government by the Nectar and Air Miles inventor, Keith Mills[48], is an exciting initiative. With the right focus and investment and embedded in joined up policy, it has the potential to be a game-changer.

The food industry itself recognises the need for change and its responsibility to help deliver this. Over the last ten years and more, it has made a significant investment to reformulate products, improve nutritional labelling, reduce portion sizes and bring to the market new healthier innovations. Progress has been made; as we see with salt. However, we recognise that

46 - Fruits and vegetables, 5+ a day: are we getting the message across? - PubMed (nih.gov)
47 - Is 'five-a-day' an effective way of increasing fruit and vegetable intakes? - PubMed (nih.gov)

48 - New specialised support to help those living with obesity to lose weight - GOV.UK (www.gov.uk)

A food and drink sector that provides healthy and affordable food for all

these are the first steps, and more needs to be done.

Further effort on reformulation will be important. But to be successful, it needs to take a long view. Previous efforts at reformulation and efforts at resizing portions or developing alternatives have consistently demonstrated that they need to work for consumers or risk creating a backlash. The evidence is clear that consumers don't want taste compromised by reformulation and that portion size is an emotive issue with majorities supporting gradual reduction over time of around 5-10%.

Public policy also needs to acknowledge that if a company will invest in years of research and development into reformulation and innovative healthier products, it needs to know it can market them and persuade people to move away from products that are more familiar to them.

We all, ultimately, have a complex relationship with food: tied up with physical need, emotional attachment, community and place, social life, means and memory. To get better eating to be commonplace, we need a response that reflects this and ensures that policies are appropriate across all life stages from infants and early years through to frail elderly adults. The change we need will not come by punishing certain choices or judging people based on what they eat. Instead, it is more likely to come about from valuing food more and giving people the means to enjoy it – from knowing more about what constitutes a good diet and by making great choices being widely available.

Getting food on the table

Central to a better food culture is understanding more clearly where our food comes from, how it is produced, and its nutritional value. While there is a broad understanding of how food is grown, and nutritional labelling has increased understanding of its nutritional value, food processing is less well-understood.

Ultimately, food processing turns raw ingredients into things that can be eaten – whether that is as simple as slicing carrots or boiling peas or more complex like baking a cake. Most of the products on our shelves have been processed in some way unless they are raw fruit or vegetables.

Processing food is central to making sure what is sold in our shops and restaurants is safe to eat and that it has a shelf-life long enough that it does not quickly go off and have to be thrown away. Without food processing, we would not be able to ensure food can preserve the vitamins and minerals our bodies need.

The concept that processed food is inherently bad for an individual does not accord with what we know about nutrition and is rejected as such by the British Dietetic Association, among others. Furthermore, the categorisation of food in this way does not align with global dietary advice, which focuses on the nutritional content of food and drinks and achieving a balance of food groups across the week.

Processed foods (e.g., fortified dairy alternatives) may play a vital role in achieving a balanced diet and achieving nutrient intakes for those aiming to reduce their meat or dairy consumption for ethical or environmental sustainability purposes. Therefore, this may have an even greater role to play in the years to come on our journey to Net-Zero.

Case Study: **One Pot Wonder Pilot**

In February 2021, General Mills, inspired by their involvement in Marcus Rashford's Child Food Poverty Task Force in 2020, launched its 'One Pot Wonder' pilot with celebrity chef Tom Kerridge and Greggs Foundation. The campaign provided slow cookers (and food boxes) to families during the February half-term holiday.

Michelin-starred chef, Tom Kerridge, developed a series of six healthy and easy-to-make recipes to accompany the slow cookers and help families prepare tasty meals. The recipe book includes delicious staples such as bean chili and winter warmers like stews. The pilot is aimed at helping reduce child food poverty in the UK and will act as an extension of General Mill's partnership with Gregg's Foundation through their Breakfast Club programme who, during term time, provide nutritious breakfasts to schoolchildren across the country.

Source: General Mills

The food and drink sector helps deliver in the UK both high quality and some of the most affordable food in the world, with average households in the late 1970s spending more than a quarter of their total household expenditure on food and drink, compared to just 11% in 2019. But, despite this some struggle to have the income to afford basics, food included. The poorest fifth of the population spends more proportionally on food[49][50].

Low incomes and poverty are primarily one for the government and for all of us as citizens who elect those governments. However, the rise in the use of food banks in recent years has put a spotlight on the struggle facing some on low incomes or beginning to claim social security benefits. As a sector, we have a record of concrete support of food banks, but ultimately, it would be better if no one had to rely on them to feed themselves and their families. We must also appreciate, as detailed in the FDF report on household budgets[51], that margins in the food industry are thin, and there will be continued pressure for increased food prices due to operational costs to meet government policies.

So, we should use the coming decade to support the government in building a holistic approach to welfare that eliminates the need for food banks.

So we will achieve this vision by:

1. A ten-year government strategy encompassing obesity and balanced diets focussing on changing the food culture in the UK to improve diet/nutrition based on insights of *what* we eat, *why* we eat it and *how* it can be delivered, which will give companies certainty and enable them to focus on delivery.

2. Industry to partner with the government and academics looking to innovate across the food chain for health and environment, including through the UKRI bids.

3. The government supporting local authorities to deliver appropriate community programmes, alongside Henry Dimbleby's suggestion of a 'Eat and Learn' programme, with support from industry as appropriate. This will take learnings from Leeds and Amsterdam.

4. Industry and government partnering to incentivise and nudge consumers to healthier choices, including through store card schemes and the governments health incentive programme, spearheaded by Sir Keith Mills.

5. Companies using the power of their brands to amplify government public health campaigns. These will provide consumers with more, easy to understand "shortcuts" like "1 of 5 A Day" and propose more "simple swaps" for consumers to make. Consistent and clear labelling should support this.

6. More reformulation and smaller portions, with a government led 2030 Challenge recognising that to succeed it needs consumer assent, and this can take time.

For this vision to be achieved, industry and government should strive to:

- Halve childhood obesity rates.
- Reverse the rate of adult obesity rates.
- Remove the dependency of foodbanks by 2030.

Case Study: **Danish Wholegrain Partnership**

A notable example of how the industry can work with the UK government to promote positive nutrients is The Danish Whole Grain Partnership. This is an example of a public-private partnership that has significantly increased whole-grain intakes. One of the biggest motivators for manufacturers to reformulate and include more whole grains in their products was to be able to bear the whole grain logo, which is well-promoted and well-recognised by consumers. Key impacts and outcomes from the Danish Whole Grain Partnership include:

- The average intake of whole-grain has increased from 36g to 82g/day in the past 15 years.
- Great consumer awareness of the initiative, in 2018, a survey showed 7 in 10 Danes recognise the logo, and 53% actively look for the logo when buying products.
- In 2009 there were 150 products with the logo. This increased to 1,097 products in 2019.
- The Partnership was awarded the EU Best Case certificate for achieving extraordinary results in the last ten years.

49, 50 - eating-into-household-budgets-report.pdf (fdf.org.uk)
51 - Eating into household budgets: the Government's recipe for food price inflation | The Food & Drink Federation (fdf.org.uk)

A food and drink sector that works in partnership with government on the big issues

By 2030, we believe the food and drink sector's relationship with the government will be a model for how the industry can work with the public sector to achieve policy goals. The sector will be a credible partner to the government and respected for its contribution to the UK's economic strength, the jobs it creates and the positive impact it has on the quality of life in the UK. It will be deeply engaged on future regulation and well-prepared for any future shocks, having built back better after Covid.

Where we are today

The model for this partnership is to be found in how the sector and the government worked together during the pandemic, ensuring that food supply was maintained despite the urgent lockdown required to protect the NHS and save lives - and which led to significant scarring throughout the sector as a consequence of the closure of hospitality businesses.

Roadmap to 2030

The sector's ability to step up and feed the nation during the pandemic highlights its resilience. The sector has benefited from collaborating with both the UK government and devolved administrations to quickly respond to supply chain issues and the consequences of retail and hospitality closures. In particular, the fast feedback loop established between the industry and the government has enabled effective and informed policy to be crafted to address urgent issues.

The vital collaboration between the government and the industry must build on this successful collaboration and trust to develop a true partnership to tackle challenges but with a greater understanding of the pressures many businesses are facing and collectively decide where we can make the greatest impact. To support this, industry will need to face head-on the challenges of the future and work together across the supply chain to move the market collectively. Industry and government should regularly review the progress towards meeting targets including on obesity and net zero, and consider collective intervention if necessary, to reach them. However, the UK Government must find a coherent approach to develop and deliver food policy across Whitehall departments and Devolved Administrations, providing a clear structure for this partnership to thrive. For example, the UK Government has developed three separate strategies for the recovery of tourism, hospitality and high streets. In order to ensure that these strategies are joined up there needs to be a mechanism to connect Whitehall departments and Devolved Administrations as well as aligning them to the National Food Strategy and the work of the Food and Drink Sector Council. This structure will ensure that the

strategies are mutually supportive and will help to strength the food supply chain as the economy recovers.

As the Food and Drink Sector Council works with its stakeholders to push for a more productive, innovative and sustainable food and drink sector, we ask the UK Government to actively engage with and support the industry throughout the process. The Council will continue to do its part to deliver on the important tasks of delivering opportunities to level up economic opportunities and reaching net-zero.

The Food and Drink Sector Council will also encourage coordination between the Devolved Administrations and the Westminster government to minimise the cost of diverging regulations for companies working cross borders within the UK, which will also help with global trade promotion.

Covid has demonstrated the benefit of the industry and the government of all stripes working closely together, and this work will need to continue. The impact of Covid will be felt for many years to come, with notable pressures on the hospitality sector, which has knock-on impacts on the entire supply chain. As importantly, there is the risk of damaging the cultural aspect of food and drink. Many restaurants and cafes might have no choice but to close due to the pandemic, many of which are valued locally and regarded as focal points for people to meet and socialise. To help prevent this, regional administrations and the UK Government need to continue to support the industry throughout the medium term, including through a re-capitalisation strategy for the sector.

During our engagements with the government over Covid, we saw the value of embedding knowledge and memory within Whitehall. The Food and Drink Sector Council would support exploring the co-design of a secondment programme between the central government and the food and drink sector to embed knowledge and memory within Whitehall.

Over the next few years, the food and drink sector will have a huge amount of change to manage, from agricultural reform, policies relating to public health and sustainability to delivering net-zero ambitions. Where regulation is necessary, it should be well-targeted, effective, and command the confidence of businesses that must operate under its parameters.

Case Study: The Food Resilience Industry Forum

The Food Resilience Industry Forum (FRIF), led by DEFRA and chaired by former Nestlé Supply Chain Senior VP Chris Tyas, conducted more than 100 meetings between senior retail, wholesale and supply chain figures and government officials during the height of the pandemic.

Established in March 2020, the Forum was tasked with joining up UK government and industry thinking, triaging, and unblocking immediate issues on the UK food and drink supply chain as the country went into its first lockdown. This included maintaining food supplies and essentials in shops, advocating for support for stores that were abruptly shut down and scanning for further pinch points during the months ahead. At times, the Forum facilitated daily morning phone calls between industry and senior public policymakers and supporting public briefings and presentations to inform businesses. Attendees found these sessions invaluable, providing Defra with crucial insight to quickly resolve complex issues. In particular, the Forum took a whole sector-based approach, ensuring interdependencies were better understood.

The hope is that this Forum will be a template for continued close engagement between the industry and the government as the country rebuilds post Covid.

While the Food Standards Agency (FSA[52]) is a key regulator, there are many other regulatory strands that sit across multiple bodies due to the nature of the complicated food and drink supply chain. A more coherent approach may provide more holistic and objective evidence gathering and impact assessment calculations to avoid unintended policy consequences. One approach would be to introduce an independent Office of Regulatory Impact, inspired by the Office for Budget Responsibility, to deliver an independent oversight within the food and drink sector by modelling policy impacts on key sectors of the economy.

To inform policymaking to support this and as mentioned previously in this paper, the industry should establish "best practice" models for data sharing that the government and the sector can use to identify drags on productivity and test the impact of policy decisions ahead of full implementation. These models could include 'digital twins', and all would be able to benefit from open-source, real-time data on the demand and supply of key 'food basket' items from the whole food chain. This would help fill data gaps and provide objective information to inform nutrition, food poverty and trade policy for the industry and policymakers.

This data infrastructure could be a vehicle to enable the government to gamify or set regionally and financially incentivised challenges to resolve specific issues, such as encouraging the purchase of healthier options in 'food deserts', which are parts of the country where there are fewer options on food. It could also cover aggregate data to cover big-ticket carbon items. This platform should have application programming interface (APIs) to enable smaller innovators and start-ups to tap into this hub of information and encourage an entrepreneurial ecosystem to create products out of it that may have a wide range of applications.

For this data infrastructure to be a true digital twin of the food and drink system, it will need comprehensive buy in from the entire food sector, including agreeing data standards, and be independently regulated to ensure it acts as an industry good, rather than unbalancing the playing field between companies.

Trust will be important in the success of this work, with all participants in the scheme comfortable that it does not erode commercial competition and conforms to the highest standards of data use. We would encourage building on the pilot work of Feed UK as a starting point.

So we will achieve this vision by:

1. UK Government to work in partnership with the sector to help it deliver short term economic recovery and long-term sustainable growth.
2. UK Government to explore the introduction of an Office for Regulatory Impact alongside a regulatory initiatives grid, similar to the one produced by HMT, BoE and FCA for the financial services industry.
3. Industry to work with the UK Government on delivering the commitments set out in this report, as part of the forthcoming National Food Strategy.
4. Industry and the UK Government to regularly review the progress towards meeting targets, including on obesity and net zero, and consider collective intervention if necessary, to reach them.
5. Industry to deliver the FDSC recommendations on providing opportunities to level up and reach net-zero, and demonstrate how the sector can support the government's ambition in this area.
6. Industry and Government to build the case for match funding by government of the FDSC's work, including on building a digital infrastructure as seen in the Feed UK project.

For this vision to be achieved, UK government should strive to:

- Create a structure for a coherent approach to and effective delivery of food policy across Whitehall departments and the Devolved Administrations.
- Continue its commitment to the work of the Food and Drink Sector Council to deliver the outcomes of the National Food Strategy.

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Glossary

I. General

Agriculture and Horticulture Development Board (AHDB) - The levy board which represents farmers, growers and others in the supply chain.

Bank of England (BoE) – The UK's central bank

British Retail Consortium (BRC) – The trade association for all UK retailers

Department of Business, Energy and Industrial Strategy (BEIS) – the ministerial department that is building a stronger, greener future by fighting coronavirus, tacking climate change, unleashing innovation and making the UK a great place to work and do business.

Department of Culture, Media and Sport (DCMS) – the ministerial department that helps to drive growth, enrich lives and promote Britain abroad.

Financial Conduct Authority (FCA) – The conduct regulator for 58,000 financial services firms and financial markets in the UK and the prudential supervisor for 49,000 firms, setting specific standards for around 18,000 firms.

Food and Drink Federation (FDF) – The FDF is the membership body for the food and drink manufacturing sector.

Food and drink supply chain ("the sector")

a. Agriculture and horticulture

An agriculture supply chain system comprises organisations/cooperatives that are responsible for the production and distribution of vegetable/fruits/cereals/pulses or animal-based products. Horticulture has been defined as the culture of plants, mainly for food materials, comfort and beauty.

b. Food and drink manufacturing

Food and drink manufacturing takes places in factories ranging from small units with few workers to large factories.

c. Food and drink wholesale

Wholesaling or distributing is the sale of food and drink-related goods or merchandise to retailers; to industrial, commercial, institutional, or other professional business users; or to other wholesalers.

d. Food and drink retail

Retail is the process of selling consumers food and drink-related goods or services through multiple channels of distribution to earn a profit.

e. Food and drink hospitality service

The hospitality sector is a category of fields within the service industry that includes food and drink service

f. Food and drink logistics

Logistics is the management of the flow of goods between the point of origin and the point of consumption in order to meet requirements of customers and corporations.

Food Standards Agency (FSA) – the independent government department working to protect public health and consumers' wider interests in relation to food in England, Wales and Northern Ireland.

Her Majesty's Treasury (HMT) – the ministerial department that sets the direction of the UK's economic policy and works to achieve strong and sustainable economic growth.

Industry 4.0 – refers to the Fourth Industrial Revolution, the current and developing environment in which disruptive technologies and trends such as the Internet of Things (IoT), robotics, virtual reality (VR) and artificial intelligence (AI) are being integrated into manufacturing practices.

Institute of Grocery Distribution (IGD) – an organisation of two vital and interconnected communities, Commercial Insight and Social Impact. Together, they work to drive change that makes a tangible difference for Society, Business and the Individual.

National Farmers' Union (NFU) – the largest organisation in England and Wales representing farmers and growers.

Office of National Statistics (ONS) – the UK's largest independent producer of official statistics and recognised national statistical institute of the UK.

Public Health England (PHE) – an executive agency, sponsored by the Department of Health and Social Care, which exists to protect and improve the nation's health and wellbeing, and reduce health inequalities.

UK Research and Innovation (UKRI) – a non-departmental public body sponsored by the Department for Business, Energy and Industrial Strategy (BEIS) which convenes, catalyses and invests in close collaboration with others to build a thriving, inclusive research and innovation system.

II. Skills Chapter

Apprenticeship Levy - a levy on UK employers (which came into effect on or after 6 April 2017) to fund new apprenticeships. In England, control of apprenticeship funding will be put in the hands of employers through the Digital Apprenticeships Service. The levy will be charged at a rate of 0.5% of an employer's pay bill above £3m a year. Each employer will receive an allowance of £15,000 to offset against their levy payment.

Careers and Enterprise Company (CEC) - focuses on young people aged 12 to 18, helping them access the best advice and inspiration about the world of work by encouraging greater collaboration between schools, colleges and employers.

Digitalisation - the incorporation of digital technologies into business/social processes, with the goal of improving them.

Gross Value Added (GVA) – defined as the output (at basic prices) minus intermediate consumption (at purchaser prices); it is the balancing item of the national accounts' production account.

Heavy Goods vehicle (HGV) - A large goods vehicle (LGV) or heavy goods vehicle (HGV) in the European Union, is any truck with a gross combination mass (GCM) of over 3,500 kg.

Lifetime Skills Guarantee - A Government initiative announced in 2020, designed to support the economy and help adults develop their job prospects by gaining in-demand skills. The initiative includes full funding for almost 400 level 3 qualifications. Any adult aged 19 and over, who doesn't already hold a full level 3 qualification (A Level or equivalent) can access the funding.

STEM - Stands for Science, Technology, Engineering and Mathematics. STEM education is the emphasis of collaboration, communication, research, problem solving, critical thinking and creativity skills that students needs to be successful in today's world regardless of specific interests or career goals.

T Levels - new courses which follow GCSEs and are equivalent to 3 A Levels. The courses offer students a mixture of classroom learning and 'on-the-job' experience during an industry placement of at least 315 hours (approx. 45 days).

Tech Talent Charter (TTC) - The Tech Talent Charter (TTC) is a non-profit organisation leading a movement to address inequality in the UK tech sector and drive inclusion and diversity in technology roles.

III. Innovation

Demonstrator hubs - a site that offers demonstrations of late-stage innovation technologies.

FeedUK - a proposal led by the FDSC Innovation Working Group, to set up a digital infrastructure within the National Data Strategy to drive technology adoption and make the UK Food and Drink system the most robust and innovative globally.

IV. Trade

Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) –   a free trade agreement between 11 countries around the Pacific Rim, including: Canada, Mexico, Peru, Chile, New Zealand, Australia, Brunei, Singapore, Malaysia, Vietnam and Japan. The UK has submitted a formal application to join the CPTPP.

EU-UK Trade and Cooperation Agreement (TCA) - a Free Trade Agreement, with ambitious cooperation on economic, social, environmental and fisheries issues. It includes a close

Free Trade Agreement (FTA) - FTAs are treaties between two or more countries designed to reduce or eliminate certain barriers to trade and investment, and to facilitate stronger trade and commercial ties between participating countries.

Trade and Agriculture Commission (TAC) - an independent advisory board set up to advise and inform the government's trade policies. The Commission published its final report in March 2021.

V. Sustainability

Circular economy – an alternative to a traditional linear economy in which we keep resources in use for as long as possible, extract maximum value from them while in use, then recover and regenerate products and materials at the end of each service life.

Decarbonisation – the process of removing or reducing the carbon dioxide (CO_2) output of a country's economy.

Environmental Land Management Schemes (ELM) – to be introduced in late 2021, it will focus on improving the environment by paying farmers for certain environmental benefits, instead of offering payments based on the amount of land farmed. The ELM includes three schemes: Sustainable Farming Incentive, Local Nature Recovery and Landscape Recovery

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Extended Producer Responsibility (EPR) – a policy approach under which producers are given a significant responsibility – financial and/or physical – for the treatment or disposal of post-consumer products.

National Data Strategy (NDS) – an ambitious, pro-growth strategy that drives the UK in building a world-leading data economy while ensuring public trust in data use.

Net Zero – the balance between the amount of greenhouse gas produced and the amount removed from the atmosphere.

Sustainability – the integration of environmental health, social equity and economic vitality in order to create thriving, healthy, diverse and resilient communities for this generation and generations to come. The practice of sustainability recognises how these issues are interconnected and requires a system approach and an acknowledgement of complexity.

VI. Health and Nutrition

British Dietetic Association (BDA) – The professional association and trade union for UK dietitians.

Eatwell Guide – a Public Health England guide that shows how much of what we eat overall should come from each food group to achieve a healthy balanced diet.

Reforumlation – Food reformulation is the reduction of salt and calories from sugar and saturated fat in processed foods.

Soft Drinks Industry Levy – In April 2018 this Levy came into effect for producers and importers of soft drinks with added sugar. Companies must pay a levy of 18p per litre for soft drinks containing 5-8g of sugar per 100mg, and 24p per litre for drinks containing more than 8g per litre.

VII. Industry / Government Partnership

Office for Budget Responsibility – Created in 2010 to provide independent and authoritative analysis of the UK's public finances.

Report Authors and Industry Engagement

The Food and Drink Sector Council (FDSC) brings together representatives from across the agri-food chain, including the devolved nations, to work with government. Its primary focus is on food chain issues that are strategic and affect the whole food and drink supply chain.

Its working groups do not duplicate work already going on within industry sectors or sub-sectors.

The Food Strategy Working Group was established in October 2019. It has been chaired on behalf of the FDSC by Stefano Agostini (CEO, Nestlé UK&I) and Stuart Roberts (Deputy President, NFU) with participation from food industry trade associations (AHDB, FDF, NFU and UKHospitality) and individual companies (Associated British Foods plc, McCain Foods, Sainsbury's) and supported by the FDSC Secretariat.

This report was produced by the FDSC Food Strategy Working Group with support from Global Counsel. As part of the development of industry positions for the report, Global Counsel held a series of workshops during 2021 on the priority policy areas. Experts from across the sector were invited to join these discussions. The food industry trade associations regularly engaged with their members and stakeholders as industry positions were developed. For example, this included engagement with the Food and Drink Industry Roundtable, a group of around 50 UK representative organisations from across the food and drink sector.

Members of the Food and Drink Sector Council have endorsed this report:

Terry Jones
Industry Co-Chair
Director General
National Farmers' Union

Ian Wright
Industry Co-Chair
Chief Executive
Food and Drink Federation

Judith Batchelar
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James Bielby
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Food and Drink Sector Council:
Food Strategy Industry Report

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