

National Food Strategy



Introduction

Henry Dimbleby published Part 2 of his National Food Strategy in July 2021 (see our previous [Briefing Note](#)), and government promised a response within six months. A response was finally leaked on Friday 10 June 2022 and the final [Strategy](#) formally published on 13 June. It is likely the impact of the Ukraine conflict on food and energy prices led to some delay in the government shaping its response to Mr Dimbleby's detailed recommendations for transforming England's food system. Media and industry response has been severely critical of the policy paper, particularly in terms of the failure to propose measures to tackle the cost of living crisis, but for farming there are some points of interest.

The Government's Food Strategy

Tackling the food system is a hugely complex issue. Not only are multiple bodies within government responsible for various policy levers influencing the production and consumption of food, food policy is also a devolved matter, leading to piecemeal strategy on how responses are formed. This policy paper is aimed at England only, but with commitments to work across the Devolved Administrations and through government to seek to drive progress. It also covers both agricultural produce and seafood; this briefing note covers the key points of interest for UK farmers and growers.

Broad objectives

The Strategy sets out three broad objectives for the UK's food system:

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

Specific recommendations

Each objective contains several specific policy recommendations and announcements, which can be grouped together under general themes.

Levelling Up: In terms of broader political agendas, much is made in the policy response of the economic focus of the 'levelling up' agenda. The UK agri-food sector employs over four million people and food is the biggest manufacturing sector with the additional feature of being broadly distributed throughout the country. The Food Strategy acknowledges the various skills and labour issues facing the sector, announcing an extension of the Seasonal Worker Visa Route to include poultry, as well as repeating announcements on the new Institute for Agriculture and Horticulture (TIAH) and knowledge exchange through the Agriculture and Horticulture Development Board (AHDB). Commitments on school food and education are to be welcomed but are likely to be felt to not go far enough. The whole section on encouraging healthier and more sustainable dietary choices is light on content. Consumer trends, inequalities in health outcomes, and enabling better eating behaviours are proposed to be covered in a new health disparities white paper from the Department for Health and Social Care, together with a commitment to study this area further.

Horticulture: Various policies are proposed to improve the UK's self-sufficiency in key fresh produce categories, largely through new industrial growing systems. Whilst we are 60% self-sufficient by value (and 74% self-sufficient in domestic food), the UK is only 23% self-sufficient in cucumbers and 13% in tomatoes. The Strategy promises that industrial energy policy will now include industrial horticulture, and planning policy will be reviewed to support new industrial horticultural developments. Innovation and automation will be driven by the Farming Innovation Programme, reducing dependency on labour. Of wider interest is a commitment to 'broadly maintain' the current level of food that we produce domestically – although it is not clear if this is by value or volume, and whether this allows for decline in some sectors provided others increase.

Protein: The government says it will support both the alternative protein sector through UKRI research grants, and the traditional livestock sector through further research into feed additives to reduce methane emissions. Eye-catching proposals to promote the consumption of wild venison, which appeared in the leaked version of the Strategy, do not appear to have made it through to the published version.

Land use: Henry Dimbleby's plan included a recommendation for a 'three compartment model' for land, to include intensively farmed, extensively farmed and land managed for the environment. Whilst the commitment to broadly maintain the current level of food production will be welcome, land use change is still part of the government's plan – the Strategy notes that 57% of agricultural output comes from just 33% of the farmed land area, leaving scope for the 67% less productive land to deliver something else. This doesn't take account of the footprint of the 33% more intensive systems, which frequently rely on bought in inputs (for feed for example) and exporting waste. The leaked version of the Strategy stated that the budget to be allocated to Landscape Recovery had been dramatically slashed, a story which was picked up in many newspapers over the weekend. This budget statement is not in the published version, but statements from the Secretary of State have made it clear that the overall Environmental Land Management (ELM) programme is to be 'demand-led' and skewed towards the Sustainable Farming Incentive.

In order to balance all of the competing demands that land is facing in achieving environmental targets, net zero and agriculture, government has committed to publishing a land use framework in 2023. The framework is intended to guide the incentives written into ELMs and assist Local Authorities in developing Local Nature Recovery Strategies. A framework will be welcome to manage the competition for limited resources, but the approach of the current government suggests it is unlikely to be too prescriptive. It remains to be seen whether it will be of any value.

Internal markets: In general, the Strategy proposes little concrete action in the way of consumer intervention on price or quality of food, whilst acknowledging that these issues are the core challenges of the overall problem. In terms of farmgate pricing, the 'fair dealing' elements of the Agriculture Act do not yet look promising for farming, with a commitment only to extend the work that has been ongoing on dairy supply contracts to the pig sector. A new Food Data Transparency Partnership will be created to ensure that consumers better understand the origin and method of production of their food choices. This will be a wide participatory body to look at the creation of "consistent and defined metrics to objectively measure the health, environmental sustainability, and animal welfare impacts of food". Whilst such systems have limited impact on time-pressured shoppers, it might help standardise supply chain efforts to understand and improve environmental impact at farm level (see our latest [Spotlight on Agri-Food Sustainability](#)). A mandatory method to underwrite 'eco-labels' to ensure consistency will be welcome. Government intends that by the end of 2023 in England all industry reporting on the production and sale of food and drink will be streamlined, with a consultation launched on mandatory public reporting on health metrics, sustainability and animal welfare. Government procurement will also target improved outcomes. We can expect a new consultation on an ambition for 50% of public sector expenditure on food procurement to be on food either produced locally or to higher standards, such as LEAF Marque. This type of procurement bias was not possible under EU rules.

Trade: More ambitious policy is set out on global trade in food. The need to keep trade flowing is critical, as shown by the situation in Ukraine, but the government is advocating for all countries to avoid trade-restrictive measures. The current government remains keen to conclude free-trade agreements and to support farmers and agri-businesses to sustainably increase production to take advantage of them. The competitive pressure on UK farming remains a concern. The Strategy commits government to publish a statement setting out requirements for those wishing to access the UK market to objectively demonstrate they deliver an equivalent level of health protection to our high domestic standards, but this has only indirect impact on the environmental and animal welfare standards of overseas producers. The Strategy accepts there is the possibility for imports to increase in the future and sets out the government's objectives to pursue a 'nature-positive global food system' through specific chapters of free-trade agreements and in general through the WTO. These vague commitments will be of scant reassurance to producers in vulnerable sectors.

Conclusion

The original National Food Strategy review was ambitious in proposing systemic solutions to the diverse problems that we see in England's food system, from waste to ill health. What the government's policy response fails to do is to propose systemic solutions, and instead promotes the same methods (free trade, consumer choice and farm subsidy) to achieve a better outcome. Confusion will reign as a result of the leaked version of the strategy, which was itself criticised for being 'flat' but in fact contained more colour than in the eventually published version. This is not the revolution that many have called for. We can for the time being expect business as usual, with some new consultations to come. However, that is not to say that Mr Dimbleby's efforts have been wasted. Despite the complexity of the food system and the solutions it demands, we are in a better place for developing mechanisms that improve public and environmental health than we were before, and future governments will have a good evidence base for deeper reform of the food-health nexus when they need it.

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