

Brexit, food and farming – a submission to the House of Lords EU Energy and Environment Sub-Committee inquiry into the implications of Brexit for agriculture. Written evidence from the Food Research Collaboration (FRC)

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Introduction

The Food Research Collaboration (FRC) is the only initiative in the UK dedicated to bringing together academics and Civil Society Organisations (CSOs) working to improve the UK food system. It was established in February 2014 with funding from the Esmée Fairbairn Foundation and is based at the Centre for Food Policy (CFP) at City, University of London.

It operates by publishing academic and CSO co-produced briefing papers on topics of current interest related to farming and food with its views reflecting those of its wide membership of food-interested academics and individuals working for food-related CSOs. It also runs seminars and round table meetings to discuss matters of relevance as suggested by the membership with the objective of ultimately influencing UK food and farming policy.

The FRC was one of the first organisations to organize a work programme around Brexit. It published a briefing 'Food, the UK and the EU: Brexit or Bremain?' (Lang & Schoen, 2016) in March 2016 ahead of the Referendum and soon after the vote, in July 2016, it convened a meeting of 57 academics and civil society representatives to gather views on the future of food and farming post-Brexit (Food Research Collaboration, 2016). Since its March Brexit briefing paper, the FRC has also published briefings on the status of UK horticulture (Schoen and Lang, 2016), the future of the CAP (Bailey, et al., 2016) and the situation with regard to agricultural labour in the UK (Devlin, 2016). The following evidence draws on those resources and addresses some of the pressing issues facing UK food and farming policy once Article 50 is triggered and pending the outcome of negotiations.

The Submission makes recommendations for the Brexit process throughout.

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1. What academics and civil society want for food and farming policy from Brexit

Our members see a multitude of implications of a British exit from the European Union for food policy and the UK food system. There are many risks, including a deregulatory agenda, a loss of funds to the UK countryside as a result of changes to the CAP, higher food prices, a reduction in agri-food collaborative research with EU partners and issues with trading regulations. But they also see opportunities. Most importantly, that Brexit creates a space to “do food differently,” to create new policies and systems to address the failings of the current food system. They believe it is a chance to bring together food, health, livelihoods and the environment in a more coherent and structured way and an opportunity to review and reform the UK food system to better support healthy, sustainable diet objectives.

Whether good or bad policies and engagement emerge from the Brexit process remains to be seen. At the time of writing, there has been worryingly little on food and precious little even on farming from HM Government other than an announcement that farm subsidies will be maintained to 2020 – a few months beyond the expected Article 50 completion – and a hint that the Seasonal Agricultural Workers Scheme (SAWS) might be replaced or resurrected somehow. There has been no high level or detailed statement on food. This is the cause of deep concern to the food industries – manufacturing, retail and foodservice – let alone to academics, scientists and civil society.

The consuming public appears thus far only dimly aware of the implications of Brexit for its food supply and prices, although it was interesting to note the flurry of concern about disruptions to fresh produce supplies in early February from the unusually cold weather in Southern Europe which apparently spawned ‘rationing’ of sales in the UK, and more importantly, sudden intake of substitutes from the USA. The Food Research Collaboration had hoped to raise public discussion of the potential implications of Brexit for food before the June 23 2016 Referendum in a series of papers about the possible dislocation to existing farm supplies and particularly horticulture (Schoen & Lang, 2016; Bailey, Lang & Schoen, 2016). One possible future for fresh food sourcing after a ‘hard’ Brexit was opened by the Prime Minister’s apparent interest in reinvigorating the ‘special relationship’ with the incoming President of the United States. US iceberg lettuces were reported to be being flown in to the UK to replace EU ones. This could herald the shape of supply chains to come, if ‘hard’ Brexit occurs and the decades of access to fresh produce from warmer Mediterranean sources were to be squeezed by tariffs.

These speculations reinforce the FRC’s case that Brexit should not be a deviation from tackling the serious issues facing UK food supply and food security. We believe that Brexit raises:

- serious economic challenges due to the drop in the value of sterling. This is already leading to major intra-supply chain power battles over whether to absorb the costs or which sector bears the burden. This is particularly onerous on small businesses.

- a need for a clear commitments from HM Government for a post-Brexit agricultural sector to differentiate itself by producing high quality products with higher – not lower – environmental, health and labour standards.
- the policy opportunity to create more diverse farming structures, positive changes in land use, and adaptation in associated supply chains.
- the need for immediate attention to reassure the public and industry about the loss of EU regulatory co-ordination on public-facing matters such as food (nutrition) labelling. Loss of participation and input to bodies such as the European Food Safety Authority, the European Environment Agency, and Health and Food Audits and Analysis (which absorbed the Eire-based Food and Veterinary Office).
- the case for careful (rather than rushed) consideration of UK bilateral trade agreements with other countries, if there is no successful agreement on EU customs union. In theory, there could be other, improved, free trade agreements (FTAs) but these almost certainly need detailed and time-consuming negotiation, and should not be accelerated through as the enormity of losing access to nearly a third of UK food supplies becomes clear to politicians and the public.
- the urgent need for improved trade negotiation capacities in Defra and other UK ministries which might affect security of food supplies. Defra continues to be cut, even though the case for reversing this is obvious. The FRC expressed concern about this in March 2016 (Lang & Schoen, 2016). The UK will no longer be part of a trade bloc sufficiently powerful to stand up to tough negotiators such as the USA. The UK will have lost both the legacy of Empire and bargaining strength from EU membership.
- particular delicacy with regard to intra-UK matters of devolution of powers. Scotland, Wales and Northern Ireland all have varying aspects of food decision-making, and they have a range of positions on severance from the EU. Food crosses internal borders, and in the case of Northern Ireland there are multiple crossings as food travels up the supply chain.
- a good opportunity for HM Government to engage with and devolve food powers to cities, regions and localities on food matters. The UK has a vibrant Sustainable Food Cities movement, and leading cities such as Bristol, London have well established food boards or councils advising their Mayors. This level of government has its policy ear to the ground about critical issues for post-Brexit food policy such as the problems of the urban food poor, the need to decarbonise the food system, and the key issue of food labour.

In sum, the FRC sees serious issues emerging for the UK food systems from Brexit. The evidence for a transition from the current state of affairs in UK food was already clear before the 2016 UK Referendum, and has been presented at international level in reports by the Chief Scientific Advisor to HM Government (eg Foresight, 2011). The case for decarbonising the food system and tackling its gross diet-related health inequalities must remain uppermost in policy-makers' minds – or else this will not be a 'people's Brexit'.

Having agreed to the UN's 2015 Sustainable Development Goals, the UK must show leadership in tackling the current unsustainable food system. Brexit could be a terrible deviation from that task, disrupting policy-makers and sapping State capacity. The FRC's science and civil society members are agreed that this should not happen - whether there is a 'hard' or 'soft' Brexit, or whether (as presently seems unlikely) the UK was to U-turn and stay in some kind of reformed EU that emerges from the Netherlands, French and German 2016 elections. The task that Defra and HM Government ought to have hard-wired into its negotiating position is how to deliver a commitment to sustainable diets from sustainable food systems (Mason & Lang 2017). This message is not currently apparent from the few signals of HM Government thinking on food and farming so far.

The rest of this Submission expands on some of the above issues with regard to shifting the UK food supply in a more sustainable direction, the problem of labour in the UK food chain, and what policy framework might replace the Common Agricultural Policy.

2. Sustainable consumption and production

The FRC seeks the wider adoption of healthy diets in the UK population that reflect sustainability in the use of resources, both economic and social as well as environmental. The government makes recommendations as to what a healthy diet should comprise, by way of its Eatwell Plate, and we assume that adoption of such a diet will lead to more healthy outcomes for a population that at present has a high incidence of overweight and obesity (61.7% of population aged 15 and over in 2014) (OECD Data, 2016). The latest iteration of Eatwell Plate added the long overdue advice to reduce consumption of red and processed meats. (Public Health England, 2016) This is an illustration of the kind of issue which must be addressed by Defra and the devolved administrations. How can the UK eat within planetary limits and grow food which meets the public health advice? This has immense implications for land use, for example (Garnett, 2016).

Whatever the positive health benefits of the Eatwell Plate, there is to date no extensive analysis or forecast as to the economic, social and environmental impact of a shift of population towards healthy diets. This is now compounded with Brexit which could potentially impact on supply sources for Eatwell Plate foods, for food prices and food availability. We thus call for a thorough examination of the potential impact of Brexit on the UK's ability to consume a healthy diet and identification of those areas that will most likely be negatively affected. Even though HM Government is starting to negotiate on Brexit, the FRC strongly urges it to reinforce the commitment to Sustainable Consumption and Production (SCP) thinking as a guiding principle for future food and farming policy. This should be non-negotiable in Brexit negotiations.

We now summarise the FRC's findings on three key areas that have an impact on the security of meeting healthy diets for the UK population.

2.1 Horticulture

Fruit and vegetables are fundamental to a healthy sustainable diet. The Eatwell Plate recommendation has been that 33% of

the diet is taken from fruit and vegetables but in 2013 actual intake reached only 24% for all households. Oyeboode et al (Oyeboode, et al. 2014) use data from the Health Survey for England (HSE) to show fruit and vegetable consumption significantly linked to reductions in cancer and cardiovascular disease (CVD) mortality, with increasing benefits being observed as consumption rises to, and beyond, 7 portions daily per person. In their modelling work, Scarborough and colleagues at Oxford show that around 33,000 deaths per annum would be avoided if UK dietary recommendations were met (Scarborough, et al, 2012; Scarborough, et al, 2014). Over 15,000 of these would be due to increased consumption of fruit and vegetables. But where are these fruit and vegetables to come from? And what if the current massive horticultural importation is hit by the drop in sterling?

At present, the UK does not consume sufficient fruit and vegetables to stay healthy. The population as a whole consumes too little, and within that there is a shocking socio-economic gradient. And now, with Brexit, supply of fruit and vegetables is up in the air. As the figures in Table 1 show, the area planted to fruit and vegetables in the UK had been slowly falling over time as had our self-sufficiency in horticultural production (see Table 2). It is to be hoped that the upturn in these figures in recent years continues.

Table 1: Area planted to fruit and vegetables (excluding potatoes) in the UK 1985-2014 ('000 hectares) (DEFRA. 2016a)

	1985	1990	1995	2000	2005	2010	2015 ³
Total vegetables	178	182	156	138	121	134	139
Total fruit	45	41	34	31	28	29	29
Total fruit and vegetables	222	224	190	168	149	163	168

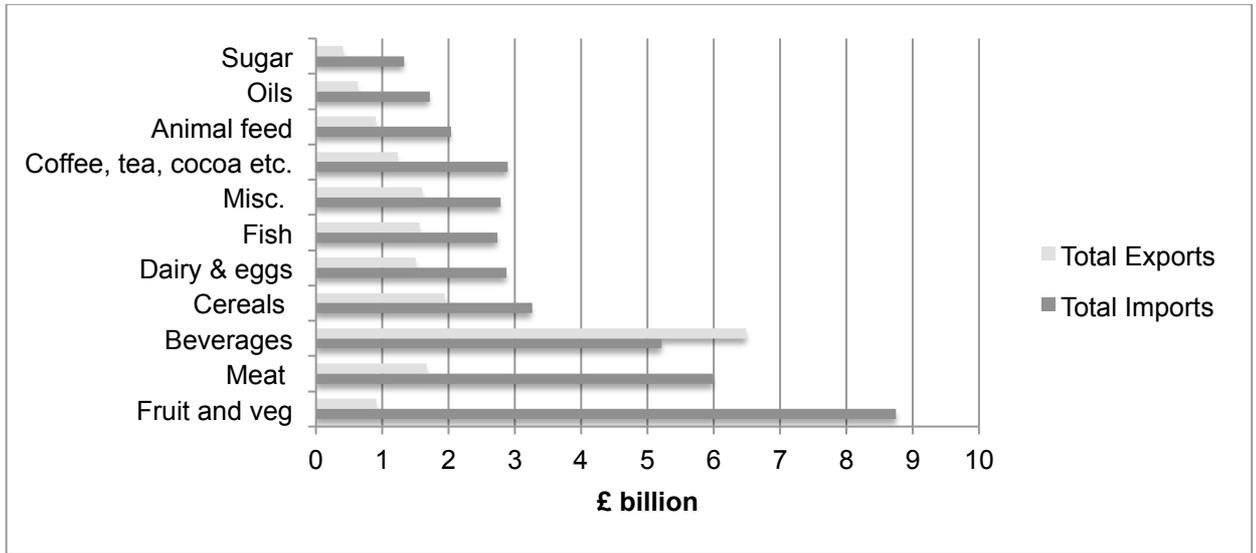
Table 2: Supply of fruit and vegetables in the UK 1995-2014 ('000 tonnes) (DEFRA, 2016a)

	1995	2000	2005	2010	2014
Vegetables					
Production	2,823	2,923	2,738	2,784	2,781
Total supply	3,873	4,097	4,610	4,572	4,887
Self-sufficiency %	73	71	59	61	57
Fruit					
Production	403	309	364	555	777
Total supply	2,730	2,984	3,543	3,653	4,358
Self sufficiency %	15	10	10	15	18

³ All 2015 data is provisional.

Meanwhile, the UK trade gap for fruit and vegetables is huge at about £8 billion (see Figure 1). This is a major contribution to the UK's high £21 billion total food trade gap.

Figure 1: UK trade gap for food groups 2014 (DEFRA, 2016b)



And the UK is heavily reliant on the EU for imports of fruit and vegetables (36% and 40% respectively), as well as for other food items (see Table 3). FRC members would request that the Inquiry gives full consideration to how the UK will source a demand for fruit and vegetables post-Brexit and whether it would be right to seek to reverse the decline in UK production areas or to continue to rely heavily on EU member states to meet the needs of our domestic markets.

Whether the UK could and should produce more good food for a sustainable diet is to be debated, as is whether the country should reorient its food supply to meet sustainable dietary guidelines (Garnett, 2014; Macdiarmid, et al, 2015; Lang, 2016). It may, for example, be profitable for land to grow cereals to be fed to animals, which are inefficient energy converters, but it makes little ecological economic sense to do so. It would be better, surely, if food-producing land was in future judged not by profitability or subsidy level alone but by how many people are fed per hectare (Cassidy, et al., 2013). There is a need to make the UK food system more sustainable - healthier, lower carbon, more resource efficient and yet still affordable.

Table 3: Reliance on the EU as supplier and buyer of UK food

2015 provisional data ('000 tonnes)	Cereals	Refined sugar	Fresh veg	Fresh fruit	Beef and veal	Pigmeat	Mutton and lamb	Poultry meat
Production ('000 tonnes unless otherwise)	24,613	978	2,780	575	875	859	307	1,694

specified)								
Imports from the EU	2,844	537	2,032	1,493	309	739	12	511
Total imports	3,876	1,083	2,421	3,701	341	740	124	540
EU imports as % of total imports	73.37%	49.58%	83.93%	40.34%	90.62%	99.86%	9.68%	94.63%
Exports to the EU	2,812	250	133	128	120	160	86	233
Total exports	3,835	325	174	130	129	217	90	292
EU exports as % of total exports	73.32%	76.92%	76.44%	98.46%	93.02%	73.73%	95.56%	79.79%
Total supply	24,655	1,736	5,027	4,147	1,087	1,382	332	1,942
EU imports as % of total supply	11.54%	30.93%	40.42%	36.00%	28.43%	53.47%	3.61%	26.31%

Source: Defra 2016 (DEFRA, 2016c)

2.2 Labour supply

Availability of labour, particularly seasonal labour for harvesting, is a key issue to examine in Britain's exit from the EU. As Table 4 shows, 15% of farm labour in England is casual labour. 35% of these casual labourers are employed on horticultural farms and 40% of horticultural farm labour is employed on a casual basis.

Table 4: Labour use on farms in England (DEFRA, 2016d)

	Farmers, partners, directors and spouses full-time	Farmers, partners, directors and spouses part-time	Managers	Regular workers full-time	Regular workers part-time	Casual workers	Total workers
2015							
England (total farm labour)	89,954	84,009	10,943	47,023	27,928	44,939	304,796
Horticulture	4,050	3,449	1,828	10,318	3,561	15,586	38,792
Horticultural workforce as % of England total	4.50%	4.11%	16.70%	21.94%	12.75%	34.68%	12.73%

Many of the casual labour jobs are filled by EU migrants: this is similar throughout the food industry as Table 5 shows. Food manufacturing, and food service are high users of EU labour. 27% of the UK workforce in the manufacture of food products comes from across the EU and 17% of the UK workforce in accommodation (hotels etc). Manufacture of food products has the highest proportion of EU employees of all 87

sectors listed in this source, with accommodation the third highest. Food and beverage service activities is the ninth largest user of EU employees out of the 87 listed sectors. Brexit would almost certainly disrupt this state of affairs. This might have more direct and immediate effects on more of the population than farm labour, perhaps.

Table 5: Numbers employed in the UK by origin 2014 (ONS, 2016)

	From the UK		From the rest of the EU	
	Number	% of total	Number	% of total
Crop, animal production, hunting	299,165	90.1%	21,101	6.4%
Manufacture of food products	224,396	63.3%	95,351	26.9%
Manufacture of beverages	58,122	94.4%	1,675	2.7%
Accommodation	266,075	72.7%	62,004	16.9%
Food and beverage service activities	880,125	71.7%	138,140	11.3%
Total employed in UK	25,560,030	84.6%	1,833,655	6.1%

A full-blown employee crisis would only arise in extreme circumstances such as if rights of workers were revoked; more likely is a slow strangulation of the food labour market creating a difficulty for replacing workers over time. These scenarios deserve more research.

2.3 Replacing the CAP

The FRC believed that leaving the EU creates scope for doing policy differently on agriculture. We have looked at various options in our briefing paper, “Does the CAP Still Fit?” but refer to one (the preferred) option here, that the CAP becomes a Common Sustainable Food Policy or Common Food Policy.

There are already pressures building for such a policy and voices in support (EPHA & EEB, 2016; De Schutter et al, 2016). The costs of healthcare from poor diet and mal-consumption (e.g. from sweet, fatty, salty ‘ultra-processed’ foods) are already immense and likely to increase with rising rates of obesity and overweight. The environmental costs of intensive farming add to the burden. Rising social inequalities from unemployment and the squeeze on labour rates are likely to maintain pressure, too.

Rather than restrict and whittle away at the current CAP, the Common Sustainable Food Policy option proposes a policy fit for climate change adaptation, alive to urbanisation, achieving better returns to primary producers of dietary ingredients necessary for health, cutting back on the massive levels of food waste, and maintenance of cultural heritage. These concerns are by no means restricted to science or NGOs. The EU itself, having first rejected this direction by abandoning the Sustainable Food Communiqué in July 2014, then adopted the ‘circular economy’ approach, partly to keep the food industry on board but partly to enable the pursuit of sustainability to meet its proclaimed ‘efficiency’ and growth goals (European Commission, 2016). The EU has long supported the Sustainable Consumption and Production (SCP) policy approach, taking the lead on this in food (and other economic sectors) following the UN’s Conference on Environment and



Development in 1992 (the 'Rio' conference). Food was signalled as a key sector for the 2011 Roadmap for a 'resource-efficient' Europe (European Commission, 2011). The problem has been that CAP has been to some extent immune from - or resistant to - these wider policy shifts. The goal of a Common Sustainable Food Policy could be to become an umbrella sheltering many diverse strands of existing and emerging policy formulation.

There has been a hint from HM Government that CAP's Pillar 1 support (which accounts for 80%) will be cut after the Brexit process, leaving room for new policy deliberations over what the current Pillar 2 payments might be for. We note that Horticulture is currently barely supported under CAP. Yet this is the single sector which urgently needs expansion if the UK is to use its land to meet public health guidelines. The FRC, like other bodies, would welcome greater public and expert debate about the implications of UK severance from the CAP:

- What is support for? If there is to be support, which sectors need most support?
- How much resource will actually be available to provide support to these sectors?
- What policy instruments will deliver that support most efficiently?
- If direct aid payments are needed - what is their purpose and function, and how (therefore) should they be allocated?
- How can other food considerations be given a stronger voice in agricultural negotiations?

The FRC believes that there is scope for clearer policy direction on all the above.

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Food Research Collaboration

The **Food Research Collaboration** is a project, funded by Esmée Fairbairn Foundation, to facilitate joint working by academics and civil society organisations to improve the UK food system.

Food Research Collaboration Briefing Papers present reviews of evidence on key food issues identified by and relevant to the FRC membership of academics and CSOs.

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