

Which?

Which? works for you

Consumer Report

April 2013



**The future
of food**
Giving consumers a say

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The recent horsemeat scandal has put the spotlight on how our food is produced, how much we pay for it and who ultimately controls what we eat. Although primarily an issue of fraud, it has raised much wider questions about the consequences of an ever-lengthening food supply chain and how government develops food policy.

The fiasco has reinforced that all those involved in production, retailing and food policy need to think very differently about the food supply chain. Greater consideration has to be given to the long-term costs of changes to how we produce food as well as the short-term impacts. There needs to be much greater transparency about how food is produced and what consumers are really paying for.

The lessons from the horsemeat affair are also pertinent to the wider challenges facing the supply chain. Global pressures such as the impact of climate change, increasing demand for basic food commodities and rising costs of energy and other inputs, require a re-examination of how food is produced.

But this can't be done in isolation from other priorities, such as helping people to eat healthily and reducing rates of obesity and diet-related disease. Food has to be the quality that people expect, respect wider social and

cultural aspects of what we eat and be affordable. The horsemeat scandal has also shown that people look to government for leadership and to ensure that people can have confidence in what they are eating.

A new approach to how food issues are handled within government is therefore needed that gives consumer interests much greater priority. This has to be based on:

- strong Government leadership and a clear food strategy
- effective consumer engagement on food issues
- a more consumer-focused Department for Environment, Food and Rural Affairs (Defra) and a stronger Food Standards Agency (FSA)
- a greater Government focus on clear pricing and long-term affordability
- enabling consumers to make healthy, sustainable and informed choices

The Which? **Future of Food Debate**

In late 2012 Which? held a national Future of Food Debate to better understand how people viewed the many competing pressures impacting on the food chain – and what they thought the priorities should be. The Debate included four two day in-depth citizens' juries held in Belfast, Cardiff, Glasgow and London. These were backed up by a survey, representative of the UK population, and a travelling video booth.

Our research highlighted that many people were unaware of the issues affecting food production and how serious the impact of the choices we make now will be for the choice and affordability of food in the future.

Price is dominating people's food choices with people changing their shopping and cooking habits, trading down and relying more on special offers. People in the juries were unaware of many of the issues presented in the research around food security and sustainability that will affect food prices in the longer-term. While there was awareness of nutrition and health issues, few people were aware of the environmental impacts of food, such as carbon emissions and water use.

Food quality and taste were important and the main basis for people's food choices, along with price, but most people in our survey wanted more information about the quality of ingredients. The origin of food and supporting local production were also important.

Overall, people wanted the Government to take a much stronger lead, developing a clear action plan to deal with the problems across the food chain. A mix of approaches to producing more

food in the UK was considered necessary. Some people were opposed to the use of genetic modification (GM) of crops and animals, but others didn't rule it out if there were clear benefits. They expected greater transparency about research and independent oversight.

At the end of the jury process, many people said that they would think differently about what they ate, but wanted more information from government and also the food industry, including clearer labelling. The food industry was also seen to have a crucial role in producing lower impact as well as healthier choices, helping people to choose them and making them affordable.

The impact of the horsemeat scandal

Since we conducted our research, the horsemeat scandal has put the spotlight on food production processes and the quality of food. A Which? survey in February found that 44 per cent of people trusted the food/ grocery sector to act in their best interests compared with 56 per cent in October last year.

Just 7 in 10 people have confidence in food safety when buying food in the supermarket, compared with 9 in 10 before the horsemeat scandal. This breakdown in trust is also affecting the types of products that people are buying, with 6 in 10 people saying that they have changed their shopping habits in some way because of the meat scandal. The issue has therefore highlighted the need to think differently about food supply chains and how they are regulated.

Giving greater priority to consumer interests

The Government has acknowledged the need to think differently about how we produce food so that more food is produced in a way that is sustainable. But current initiatives do not give enough priority to consumer interests. Action to address this is needed in the following five areas.

1 Strong Government leadership and a clear food strategy

Food issues are currently dealt with in a fragmented way with no clear sense of overall direction and priorities. But the issues that are facing the food supply chain require much stronger Government leadership. Some food policies and strategies do exist, but only in some parts of the UK and only addressing part of the picture. There is no food policy for England. There are also no formal co-ordination mechanisms in place to ensure that a consistent approach is adopted across different government departments and agencies.

A much clearer Government vision and strategy is needed for the types of food production that we should have in the UK to meet our needs and how to put this in place. Wider stakeholders need to input into this and will be largely responsible for putting any strategy into practice. But it is the responsibility of Government to set out the priorities and ensure action.

2 More effective consumer engagement on food issues

The horsemeat scandal has shown that the way that our food is produced can be very different in reality from what people expect. It is essential

that consumers are consulted on the different challenges facing the food supply chain and that their views are reflected in Government policy. The Which? research emphasised how there has been little wider public debate around the many issues facing food production, including the potential role of new technologies.

Public engagement is needed in order to ensure that consumers have a say in where the balance between the competing demands that need to be addressed across the food system should lie. This should feed into Government policy-making and decisions about the role of new foods and technologies need to take account of consumer attitudes.

The Which? Food Debate should be the starting point for a much broader-based public engagement initiative around the future of food. This needs to fully explore the questions raised and possible solutions, building on the deliberative research methods used by Which?. It must then feed into the Government strategy.

3 A more consumer-focused Defra and a strengthened Food Standards Agency

The responsibilities of the Government departments and agencies that deal with food are also important. Consumer interests have to be systematically taken into account by all Government departments that deal with food issues. They can no longer afford to be treated as an optional extra.

The FSA was created with an independent board and a clear responsibility to protect consumers. Changes in 2010 meant that many of the FSA's responsibilities were reduced. A new food agency will soon be set up in Scotland. At a time when food policy needs to be coherent and focused on the longer-term challenges as well as short term problems, a more fragmented approach is emerging.



Besides the structural changes, there has also been a change in emphasis. Reducing regulatory burdens and light touch enforcement, have become the dominant focus, particularly in England. The horsemeat contamination across the food industry has, however, shown just how short-sighted this approach has been, paving the way for fraud.

Consumer interests need to be given greater priority within Defra and nutrition, food labelling and standards policy need to be returned to the FSA in England and nutrition policy to the FSA in Wales. The new food agency to be established in Scotland must also be independent, open and transparent and have a clear remit to put the consumer first.

Regulation should not automatically be seen as a burden and the light touch approach to enforcement needs to end. Effective, targeted controls that are enforced across the supply chain benefit consumers and the food industry. Where voluntary action cannot achieve enough change by the food industry in key areas such as tackling obesity, regulation is needed.

4 A greater Government focus on clear pricing and long-term affordability

Food prices dominate people's choices and many are having to change how they shop for food because their budgets are squeezed. Our research has reinforced the need for much greater transparency about the price of food so that people understand what they are really paying for.

It also needs to be much easier for consumers to compare the price of different food products. Although unit pricing is required, Which? research has shown that this is not always presented prominently, clearly or consistently.

Price promotions can also be confusing and, in some cases, misleading. The longer-term costs of how food is produced also need to be more explicitly considered.

Food retailers need to improve unit pricing across the board to ensure that it is clearly legible and consistent so that consumers can easily compare prices and ensure special offers are genuine. Much of this can be achieved on a voluntary basis, but the Government should also revise the Price Marking Order to ensure that there are no barriers to use of consistent units. Revised guidance on special offers must be effectively implemented and monitored.

The Government food strategy needs to tackle the underlying causes of rising food prices and ensure consumers have access to healthy, affordable food in the longer-term. This needs to explicitly address the competing demands and trade-offs between price and issues, such as quality and consumer choice, as the horsemeat scandal has illustrated.

5 Enabling consumers to make healthy, sustainable and informed choices

It is essential that consumers have a meaningful choice over what they eat. The horsemeat scandal also highlighted the complexity of food production and supply chains with the ingredients used in food potentially coming from many different suppliers and countries.

The issues that will impact on consumers in the coming years also mean that the information people will need is changing. Our research showed that many people want to know where their food comes from and this is often because they want to support local

producers. But many foods and ingredients still do not have to label the country of origin.

There are many environmental and ethical labelling schemes on the market, but Which? research has shown that there is a low level of awareness of the schemes and confusion about what they mean. People are more aware of diet and health issues, but unhealthy choices are too often the easier choice.

Addressing the need to ensure enough food is likely to mean an increasing focus on the role of new technologies. But these can often be controversial as initial attempts to use GM ingredients in food products highlighted.

Improvements to labelling of food ingredients and origin are needed as well as clearer government advice and information on how to make choices that are both healthier and have a lower environmental impact. Labelling schemes relating to environmental and ethical issues need to focus on the impacts of most concern. Country of origin labelling needs to be extended to meat products and dairy products. Ingredients need to be clearly indicated and production methods that may raise concerns, clearly labelled.

More action is needed by the food industry and government to help consumers make healthier and more sustainable choices. This should build on initiatives such as salt reduction and traffic light labelling, tackling issues such as price and availability, including the balance of foods in promotions.

Labelling requirements also need to be robustly enforced so that consumers can have confidence in what they are buying and easily compare best value. This includes dropping current government proposals to relax labelling laws for meat products sold loose and to decriminalise failure to comply with labelling laws.

Challenges facing the food chain

The recent horsemeat scandal has put the spotlight on how our food is produced, how much we pay for it and who ultimately controls what we eat. Although primarily an issue of fraud, it has raised much wider questions about the consequences of an ever lengthening food supply chain and how government develops food policy.

The food supply chain is also facing many other challenges that will affect the types of food choices we can expect in the future. Increasing global demand for food, food supply shortages and the impact of climate change mean that the way that we produce food is under scrutiny as never before - and that food prices will continue to rise.

Many people's food budgets are already being squeezed and food prices are second only to energy and fuel prices in terms of economic issues that most worry people¹. Many people are changing the way that they shop for food as a result. Global trends in food supply and demand may seem far removed from the choices we make in the supermarket, but they are already having an impact and will increasingly do so.

‘Any one of these pressures would present substantial challenges to food security; together they constitute a major threat that requires a strategic reappraisal of how the world is fed’

At the same time, the balance of foods that we eat is contributing to the worst rates of obesity in Europe and diet-related diseases, such as cancers, heart disease and stroke, are the major killers in the UK. Far too many people still suffer from food poisoning and food fraud, as highlighted by the recent horsemeat scandal, is on the rise with wide-ranging consequences.

Which? held a national food debate at the end of 2012 to begin to understand how people around the UK prioritised these different challenges in order to inform the Government and food industry's approach going forward.

In January 2011, the Government's Foresight report on the future of food and farming² warned that the global food system would experience an unprecedented mix of pressures over the next forty years. Global population will increase from nearly seven billion to around nine billion by 2050 along with demand for food. Competition for land, water and energy will intensify while the effects of climate change will become increasingly clear:

"Any one of these pressures (drivers of change) would present substantial challenges to food security; together they constitute a major threat that requires a strategic reappraisal of how the world is fed."

Decisions on how we move forward and the food production methods that are used will have enormous implications for people's choice of food, as well as how much they pay for it. The main challenges are summarised below.

Volatile food prices

After many years of relative stability, the last few years have seen a great deal of food price volatility – and this is set to continue. Food prices have risen in real terms by 12 per cent over the last five years. Seventy eight per cent of people have seen their grocery bills increase and 39 per cent have seen them increase by a lot.³

The percentage of household income spent on food has been falling over the last few decades, but this is now changing. People on lower incomes have been hit

particularly hard as food accounts for around 15 per cent of their total expenditure compared with 8 per cent for the 10 per cent on the highest incomes.⁴

There are no easy solutions as the increase in food prices is down to a complex mix of factors. There is less food to meet demand which means that the global market price for key food commodities has increased. The Food and Agriculture Organisation (FAO) estimates that 70 per cent more food will need to be produced globally by 2050 if current patterns of consumption continue⁵. But extreme weather conditions as a result of climate change are affecting the availability of key crops. The type of food demanded is also changing with more meat and dairy products being eaten in evolving economies, increasing pressure for commodities such as soya and maize used in animal feed – and contributing to greenhouse gas emissions.

Other factors, such as policies encouraging the use of land for biofuels rather than food crops, speculation on commodity markets, declines in global food stocks and the imposition of export bans and other trade disporting policies - such as tariffs - have exacerbated the problem. The contribution of these global factors, compared to specific UK supply chain issues, such as the rising cost of energy across the supply chain and currency fluctuations, is difficult to quantify. The farmers' share can also be a relatively small proportion of the final retail price. Defra estimates, for example, that the farmers' share of wheat used for white bread is around 11 per cent.⁶

Retailers point to price promotions as a way of keeping pricing low for consumers and around 40 per cent of foods are on promotion in supermarkets but Which? research suggests that this is having little impact. Seventy eight per cent of people think that supermarkets are often trying to mislead customers with special offers³ and our research has repeatedly found problems with offers that are not what they seem⁷. This is compounded by a lack of consistent, clear unit pricing. Office of Fair Trading (OFT) guidance on special offers has recently been revised⁸ and some supermarkets have committed to improve their unit pricing policies, but it remains to be seen if these changes will adequately deal with the problem.

The environmental impact of food

The impact of climate change is already having huge implications for the world's food supply. Extreme drought and flooding has, for example, led to harvest failures (eg the failure of the US corn crop in 2012) which are limiting global supplies and pushing up world food prices. But food in turn is an important contributor to greenhouse gas (GHG) emissions. The way that food is produced can, therefore, exacerbate food shortages and ultimately volatile food prices in the longer-term.

Food production is very resource intensive. Some foods have a greater environmental impact – and it is these foods that the expanding world population is eating more of. Meat and dairy production generally has a greater impact on the environment than plant-based products. Overall, food contributes around 20 per cent of total GHGs, but many of these are the more potent nitrous oxide and methane, rather than carbon dioxide⁹.

Besides GHGs, food production also impacts on the environment in other ways. This includes waste and pollution, but also biodiversity. Around half of global fish stocks are, for example, fully exploited and around 30 per cent are over-exploited according to the FAO¹⁰. Food production also involves large amounts of 'embedded' water that is not immediately obvious. WWF estimates that it takes around 200 litres of water to produce the sugar in a can of cola and between 10-20,000 litres of water to produce 1Kg of beef¹¹.

A lot of the food that is produced is wasted, along with the resources that went into it. The Waste Resources Action Programme (WRAP) estimates that there is around 7.2 million tonnes of household food and drink waste each year in the UK, of which around 4.4 million tonnes is avoidable¹². More food therefore needs to be produced in ways that minimise the environmental impact.

Diet and health

The choice of foods made can also be a major risk factor for diet-related diseases such as cancers and heart disease. Around a quarter of the UK population are obese and over 60 per cent are overweight or obese¹³. One in three children are now overweight or obese.

This is an economic and social burden as well as a health one. Excess weight costs the National Health Service (NHS) more than £5bn each year¹³. Poor diet is also a contributor to other diseases such as cancers, heart disease and stroke. It is estimated, for example, that around one in ten UK cancer cases is caused by unhealthy diet¹⁴.

Various government strategies have been developed over the last few years to try and tackle the problem. Attention has shifted away from merely educating people to changing the environment in which people make their choices, including the choice of products offered and the way they are promoted. But so far, there has been little sign of success as obesity rates are generally not falling or even levelling off¹⁵. This will have huge implications for people's quality of life and life expectancy with associated complications, such as diabetes, also on the increase.

The Government has well-established recommendations for the balance of foods and nutrients that make up a healthy diet. But as a population, we are failing to meet them - eating too much fat, sugar and salt and not enough fruit and vegetables. This is being exacerbated as food prices rise and people's budgets are squeezed¹⁶.

There are many reasons why it is difficult to eat a healthy diet. Most people say they try and eat a healthy diet, but struggle to put it into practice. Barriers include the perceived cost of healthier options, relative to unhealthy ones, 'hidden' levels of fat, sugar and salt in foods that may not always be obvious, relative convenience of unhealthy foods and irresponsible marketing practices.

A Which? survey in February 2012¹⁷ found that the actions people most wanted from the Government to help them eat healthily were reducing fat, sugar and salt levels in foods, more responsible food promotions to children, consistent labelling of nutrient levels in foods and more healthier choices included within food promotions. People's health requirements therefore have to be central to decisions about how food should be produced and supplied in the future.



The impact of climate change is already having huge implications for the world's food supply. Extreme drought and flooding has, for example, led to harvest failures which are limiting global supplies and pushing up world food prices

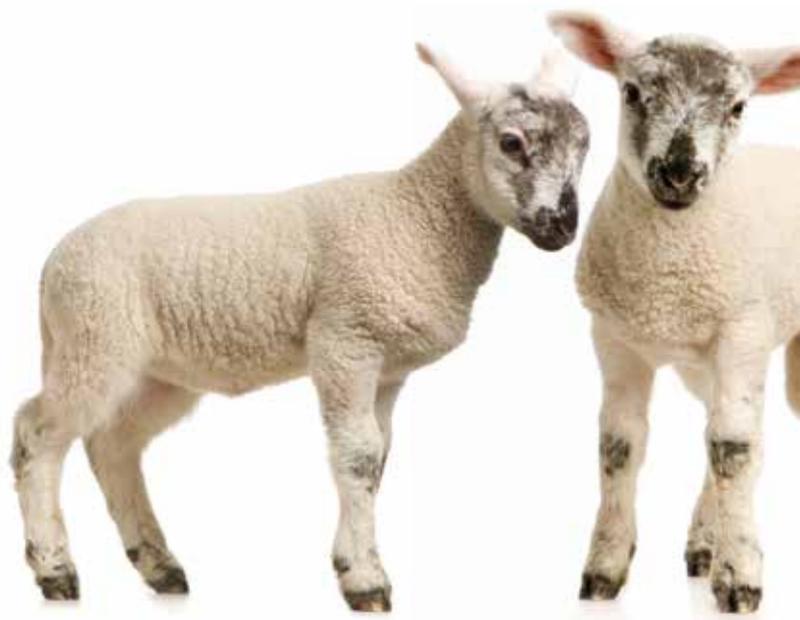
The safety of food

Many hazards exist across the food supply and production chain which can have devastating consequences if they are not anticipated and effectively controlled. As the horsemeat episode has shown, with food prices rising, the incentives for fraud and poor practices are even greater. There is also the potential for new food safety risks as a result of the changing climate, food shortages and efforts to reduce food waste.

The FSA estimates that there could be as many as a million cases of food poisoning in the UK each year with around 500 deaths¹⁸. The main type of food poisoning bacteria, *Campylobacter*, which is mainly linked to contaminated chicken, is still poorly understood and cases are rising. Viral food poisoning is also a major issue and other types of food poisoning, such as *E Coli* O157, can be less common, but more devastating.

The complex food supply chain can also present other risks, including chemical and radiological ones. The FSA investigated 1714 incidents in 2011, compared to 1505 in 2010 and 1208 in 2009¹⁹. Among these were the presence of carcinogenic dioxins in vegetable feed from Germany and the implications of the Japanese Tsunami and breakdown at the Fukushima-Daiichi nuclear power station for UK imports.

New issues and threats are constantly emerging and presenting new challenges for food safety. As the climate changes, new forms of pathogenic bacteria that pose a risk to humans are also likely to emerge. New technologies may be needed, but can raise potential risks. Issues such as GM and food irradiation have been controversial and have required specific regulatory frameworks and approval processes to be put in place at EU level to ensure their safety is assessed before products can be marketed. The use of animal cloning and nanotechnologies also raise concerns, but the regulations that should cover them are still under discussion. At an early stage in the development of a technology, it can be difficult to be clear about all of the potential risks as research may be limited and many uncertainties can exist. Wider social and ethical factors can also determine what level of risk people are prepared to accept.





The use of animal cloning and nanotechnologies also raise concerns, but the regulations that should cover them are still under discussion

The quality of food

The quality of food consistently come out as one of people's top priorities when choosing food in Which? surveys. While issues such as health, safety, price and the environmental impact are all important, food also has to taste good. It is important that people know the quality of the food that they are paying for and can have confidence that food is what they expect. The contamination of meat products with horsemeat has shown how important it is that consumers can have confidence in what they are buying - and the impact that failure to provide the quality of food that people can expect can have on consumer confidence in the food industry.

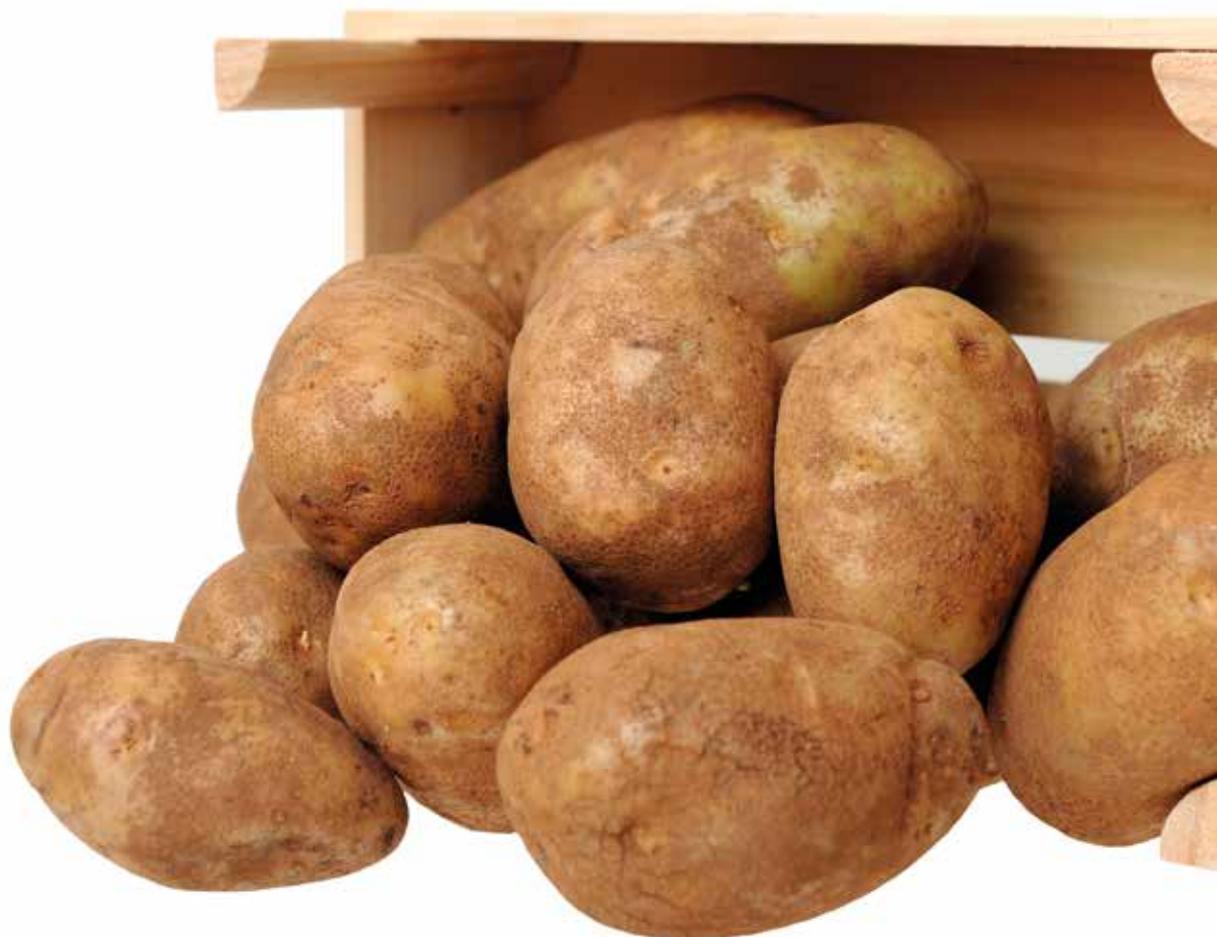
Food production has become ever more sophisticated, bringing a wider range of choice. But this also means that many ingredients can be used in food products when people would not necessarily expect them to be present. Prices may be kept low through the use of cheaper ingredients and bulking agents, including added proteins and water for example.

Some people may wish to avoid particular ingredients for religious or ethical reasons - or they may just prefer not to eat certain ingredients or ingredients produced using particular production methods. A whole range of labelling and assurance schemes are now applied to foods, from Fairtrade to free range, and it is important that they are meaningful and that people can have confidence in them.

While successive initiatives - most recently, the new EU Provision of Food Information to Consumers Regulations²⁰ - have improved food labelling so that people have much clearer information about what is in their food, gaps still remain and our research²¹ shows that over half of people surveyed still want more information about the quality of ingredients used (61 per cent), food safety standards (58 per cent), where the food is produced (53 per cent) and the nutritional content (51 per cent).

But food may not always be what it seems. Food fraud is on the increase in the current economic climate. Cheaper ingredients may be added to foods to increase profits or products may be mis-described. The horsemeat scandal has highlighted how essential it is that there are effective controls and traceability in place across supply chains. People need to have confidence that foods are labelled clearly and they can make informed choices about the quality of food that they are buying.





Producing more food

An increasing global population will require a lot more food to be produced and distributed. The Foresight report emphasised the need for sustainable intensification: simultaneously raising yields, increasing the efficiency with which inputs are used and reducing the negative environmental impacts of food production. Determining how intensive and how sustainable UK food production should be is a difficult and potentially controversial area.

Recent Government announcements, for example, indicate strong support for the use of GM crops in England²², although other parts of the UK have policies against their use. Our research has shown that this is still a controversial issue for some consumers, although others may be willing to accept GM crops if there are clear consumer benefits.

Other technologies, such as the use of cloned animals for production or use of nanotechnologies also raise challenges - both in terms of how the risks are controlled as well as wider social and ethical issues. Our research shows that there are a spectrum of views. Some people take a principled approach against the use of some new technologies, whereas others are more willing to

consider them if they feel that there is a clear rationale for why they are necessary in the UK, compared to other options to improve efficiencies, and there is sufficient independent oversight.

While sales of organic products have been dropping as people have traded down in the current economic climate, it is important that this choice also remains available. Foresight also took the view that while organic production can not be the main strategy for addressing problems of food security, a flexible approach is needed that incorporates elements of organic agriculture, such as practices that improve soil quality or increase on-farm biodiversity.

Addressing competing pressures

Many of these challenges are difficult. A mix of approaches will be needed and different trade-offs will need to be resolved. Some ways of increasing food production and enhancing the contribution of farming or food manufacture to the economy may not fit with the desire to minimise the environmental impact of foods or help promote healthier choices. Improving the environmental credentials of food production will also require choices to

be made. What's good in terms of carbon may not always be good in terms of water usage, for example. Tomatoes from Spain may be better from a GHG perspective (rather than using energy to grow them in greenhouses in the UK) but could exacerbate Spain's water shortage.

Environmental or economic benefits may also contradict broader social or ethical considerations, such as animal welfare, or fail to fit with what people see as the traditional image of farming and its contribution to the landscape.

But there are also opportunities for positive developments on several fronts. There can be a lot of consistency between advice about which types of food or food production are beneficial for health and for the environment.

A coherent strategy is needed, along with much more joined up advice for consumers. Issues such as quality, health, availability, choice and affordability need to be tackled alongside efforts to increase food production and reduce its environmental impact.

The origin of food

Actions that are taken in the UK to produce food more sustainably, including reducing the environmental impact of food production, need to be seen in a global context. The food we choose now comes from a complex global supply chain.

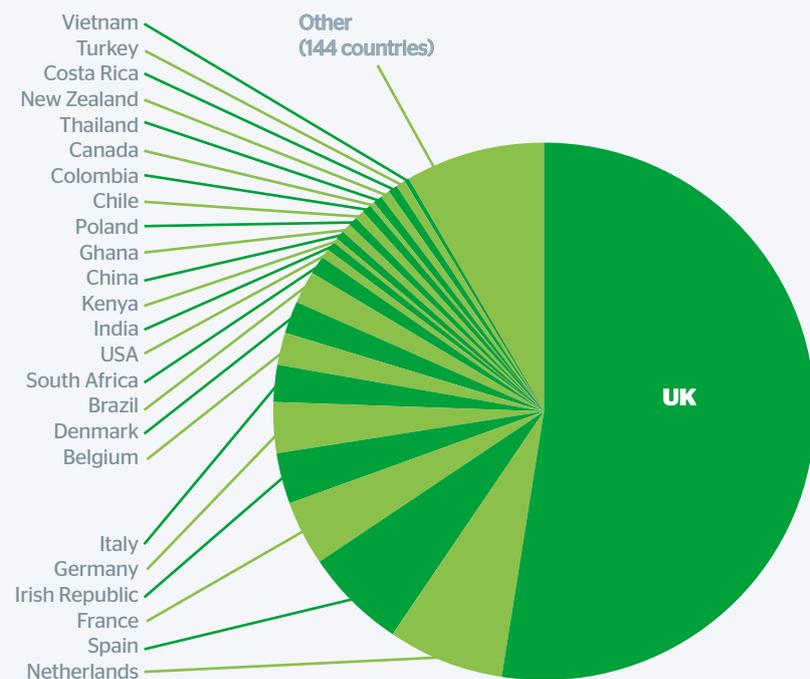
There are limitations to what can and should be produced in the UK and retailers are reliant on food from a wide range of sources in order to offer the choice of foods that we have come to expect all year around. Even if food is produced in the UK, the agricultural inputs, such as feed and fertilisers, or ingredients used during processing, may not be. The horsemeat contamination incident illustrated clearly how complex food supply chains can be, with many intermediaries involved - and how important it is to have effective traceability systems in place.

Which? research²¹ has shown that many people are interested in the origin of their food - particularly meat and dairy products. In most cases, this is because people want to support British producers. The extent to which food travels is an

important factor, but not always the most important consideration when determining the environmental impact of food products. While many people may think of buying local and in season as being an important part of action to reduce the environmental impact of what is eaten, the concept of food miles in reality is

no longer considered an indicator of the likely environmental impact of food production. The whole life cycle of a product from the source and production methods, inputs such as animal feed or pesticides have through to transport, preparation, consumption and ultimately waste have to be taken into account.

The origin of food consumed in the UK in 2011



Source: Defra²³

Consumer priorities

Consumer priorities

Which?'s research has shown that most people know little about the breadth of challenges that face food production and which are preoccupying policy makers.²⁴

In September 2012 Which? launched a wider food debate to understand what people thought about the issues affecting the food supply chain, the implications for food choices and what they considered to be the priorities

The Which? citizens' juries

The main part of our Future of Food research involved four citizens' juries held in Belfast, Cardiff, Glasgow and London. Twelve to 14 people met over two days in each location in September to consider the key challenges affecting the food chain.²⁶

Our researchers recruited people to be broadly representative of different groups of the population. Over the two days that they met, they were presented with evidence about four key challenges:

- volatile food prices;
- food security and the potential for food shortages;
- the environmental impact of food production; and
- diet and health issues.

Participants were asked to consider these issues against the backdrop of other factors that influence their food choices. This included issues such as quality, safety, cultural and wider social aspects. These factors were prompted by a pre-task where people were asked to record the reasons they chose particular products during their weekly shop and to discuss them with friends.

The process was facilitated by an external research agency, Community Research. The evidence shown to the jurors took several forms, including written materials, expert video evidence, television footage and an expert panel discussion which included representatives of food retailers, manufacturers, conventional farmers, organic farmers and an independent consultant with a background working for organisations with an interest in consumer, environmental and ethical aspects of food policy.

The process was over-seen by an advisory group that included a mix of interests and expertise to ensure the validity of the process and that the juries were run in an unbiased way.

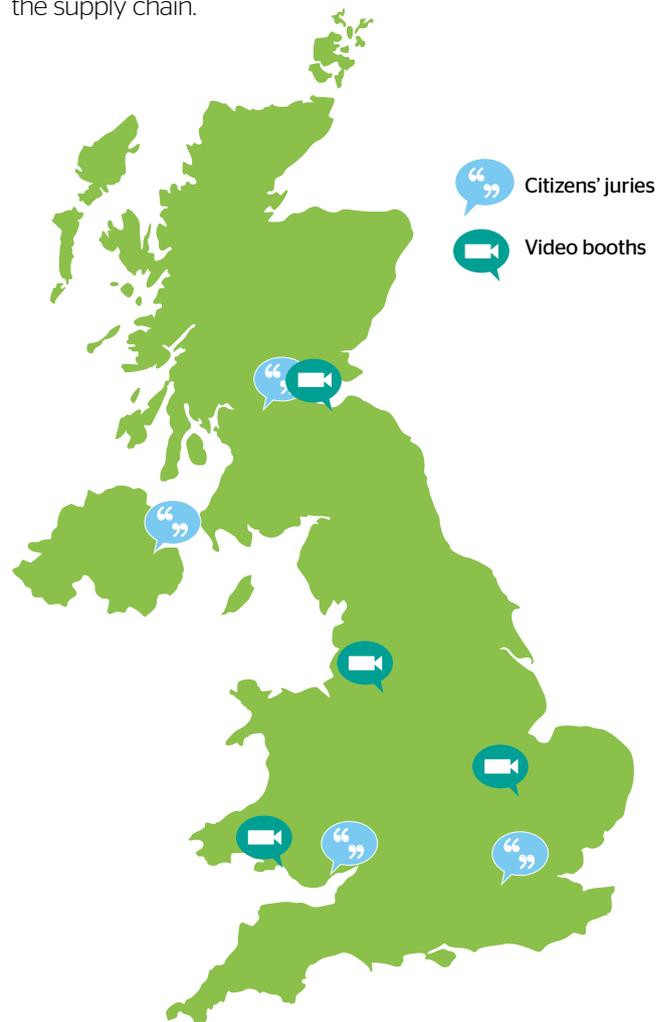
Wider research

Which? also organised travelling video booths around the country. These captured people's views in Edinburgh, Cambridge, Swansea and Manchester, providing a less deliberated perspective on people's priorities when choosing food.

We conducted a survey in October 2012²¹ which was representative of the UK population to gain a wider perspective on some of the key themes that had emerged during the citizens' juries and booths. This drew on previous research that we had conducted into some of the emerging issues, including food prices, healthy eating, food safety, information about sustainable food choices and attitudes towards new technologies.

Following the widescale contamination of meat products with horsemeat, Which? also conducted further research in February 2013²⁵ to see how this had impacted on consumer confidence in the food industry, food safety more widely and on people's shopping habits.

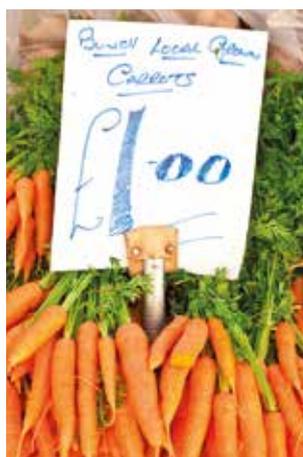
This mix of research provides a wide-ranging perspective on how people respond to some of the challenges facing the supply chain.



Main findings

Overall our research found, unsurprisingly, that the price of food was initially the dominant concern for most people. The people who took part in our citizens' juries and travelling video booths generally felt far removed from the way that their food was produced - although there were differences around the country with people in Cardiff and Belfast having a stronger sense of supporting local production.

While the people in our citizens' juries were very aware of food price issues and concerns about obesity and other diet-related diseases, they were generally unaware of the issues underpinning food price volatility. This included the different ways that food production impacts on the environment and contributes towards climate change and the way that global concerns about food security impact on the UK. By the end of the process, people across the juries were generally very engaged with the issues and surprised that they had not been made more aware of them, particularly around the environmental impact of food choices.



“Yeah, for me my priorities have changed because when I came, when I first started, my priority was price and... well, actually more quality than price...for me the environment has gone up and so has the future of food production” London

Several themes were consistent across the Which? food debate

■ More openness and clearer information:

People were oblivious to many of the issues, particularly around food security and sustainability, but became very engaged once they were explained and felt that others need to be better informed.

People felt they would change their habits as a result of the jury. But clearer advice as well as in-store information and labelling, was also wanted by many participants.

■ Government leadership:

The issues were considered to be of such importance that there needs to be a government strategy and coordination of the actions needed.

■ A shared responsibility:

There was a feeling that no one is taking responsibility at the moment. People thought that action was needed across the board and that they would only change to more sustainable choices if government and industry act.

■ Action has to be global:

Reducing the environmental impact of food production cannot be looked at in isolation so a global strategy is needed. The UK was seen to have an important role and the global nature of the issues should not be used as an excuse for inaction.

■ Price and availability:

People wanted retailers to take more responsibility and move beyond the constant focus on the cheapest products and also advertise products based on quality and sustainability. Price was seen as a key barrier to making healthier and ultimately more sustainable choices.

■ A mixed approach to food production methods:

People felt that the future was not about one particular approach or system of farming. Organic may have a role, but won't be enough and advantage needs to be taken of science and technology. They thought a clearer strategy for what can be grown most efficiently in different regions was needed. People also thought that

skills and best practice needed to be shared and farmers supported so that they can be more efficient.

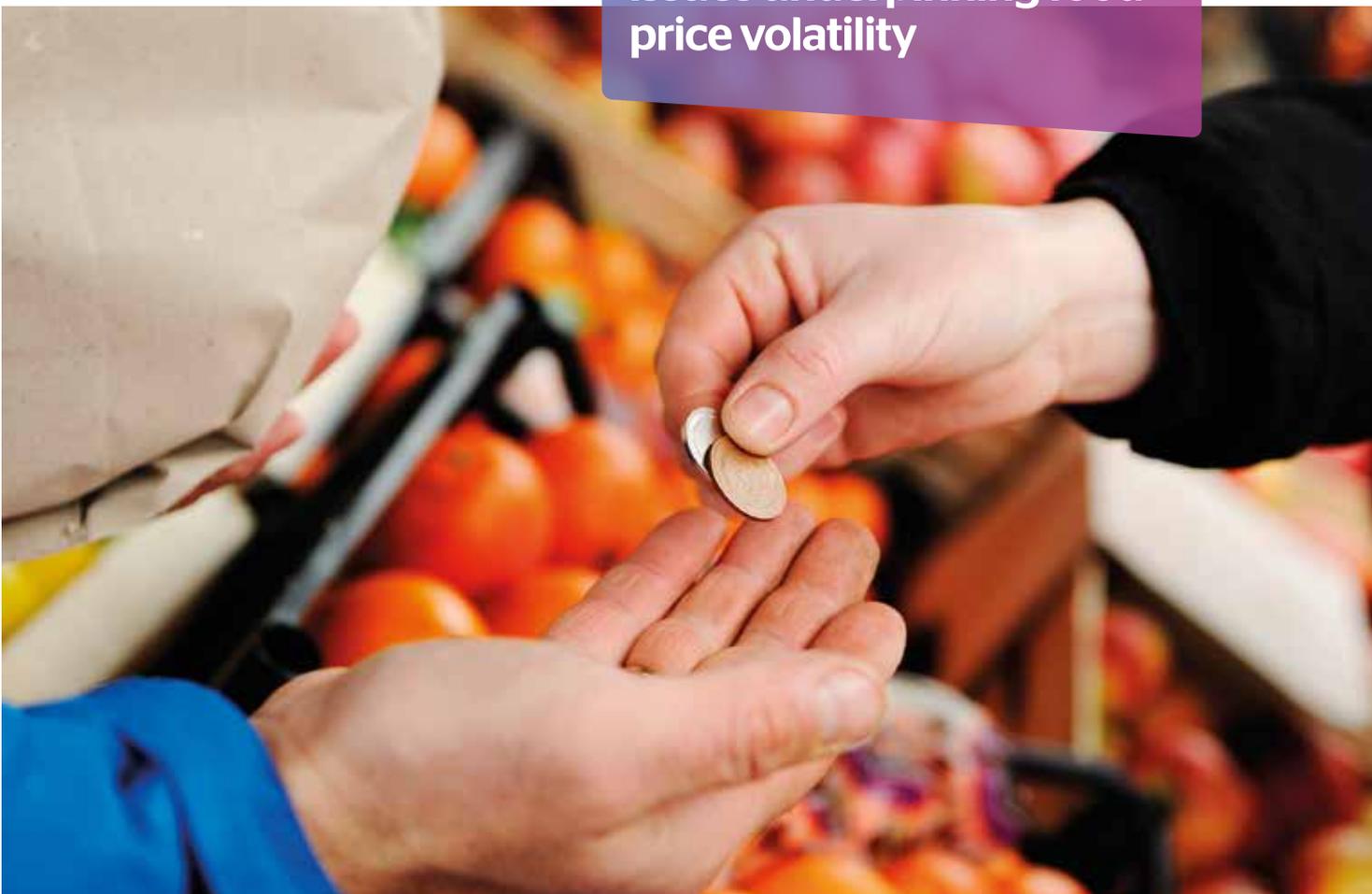
■ **Greater transparency about new technologies:**

People wanted more information about the tests carried out on genetically modified (GM) crops and expected effective, independent regulation of new technologies. Some do not like the idea of GM (largely on ethical grounds and because of concerns about longer-term unintended consequences), but if adequate checks are in place some are willing to see it as an option.

■ **Different choices:**

The groups recognised that although it might be difficult, consumers need to make different choices in the short term as choices will be limited in the long term if behaviour is not altered. The advice on which choices are healthy and sustainable was not thought to be clear enough. There was a feeling that we can't expect some foods all year round if it is damaging for the environment.

While the people in our citizens' juries were very aware of food price issues and concerns about obesity and other diet-related diseases, they were generally unaware of the issues underpinning food price volatility



Detailed findings

Overall priorities when buying food

People in the Which? juries initially highlighted price, quality and taste as the most important factors when choosing food.

After hearing about the different issues that will impact on food production in the coming years, price, taste, quality and health were still seen as important but environmental concerns and the origin of food had increased in importance for many people.

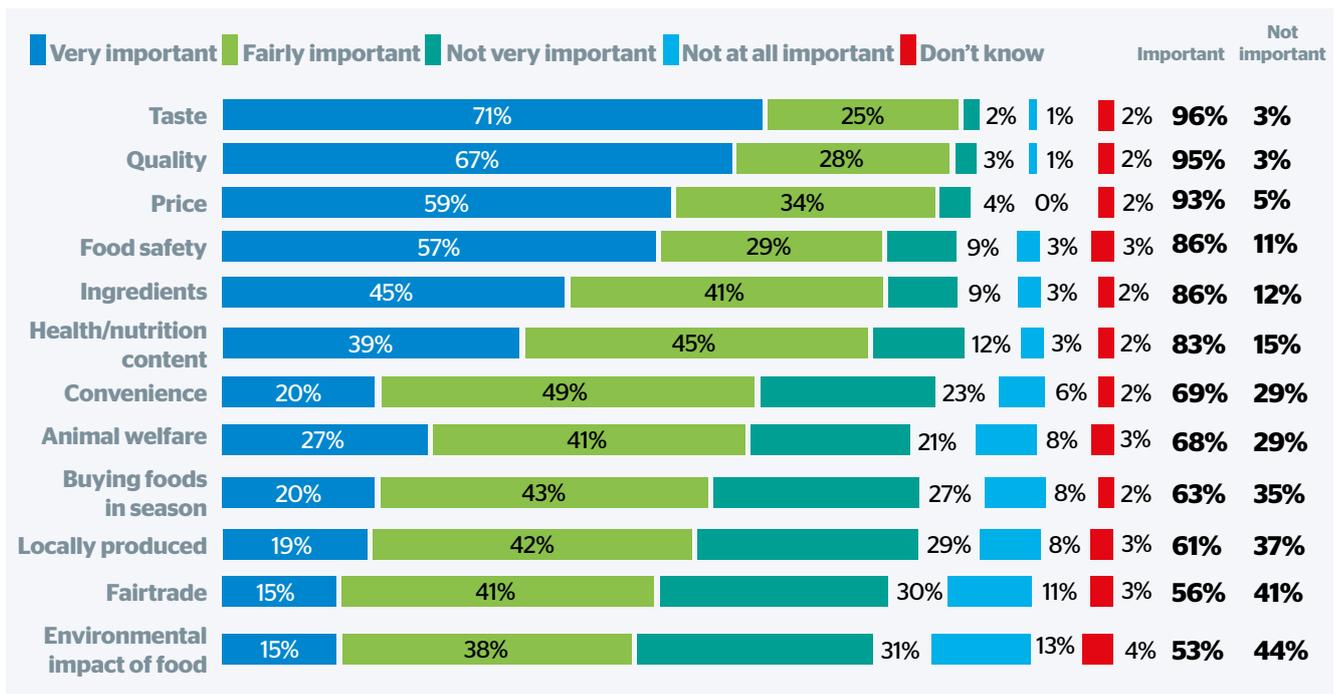
Our survey in October 2012²¹ found that 92 per cent of people were confident in the safety of the food they buy

in the supermarket, with 37 per cent saying that they were 'very confident' and 55 per cent 'fairly confident'. This compares to 79 per cent who were confident in the safety of food they buy when eating out, such as in restaurants and cafes. Fifteen per cent of these were 'very confident' and 64 per cent fairly confident.

Responses were, however, very different after the horsemeat scare, with those saying that they were confident in the safety of food in supermarkets dropping to 72 per cent and, in the case of food bought when eating out, to 66 per cent.

“ Many people I speak to feel that they would like to eat free range, organic, British etc, but the cost often means that they choose a cheaper alternative ” Cardiff

Importance of factors when shopping for food (October 2012)



The dominance of price concerns

Price was the overwhelming consideration throughout the jury deliberations. People are shopping around more, looking for bargains and eating out less. In some cases, they feel that they have to make real sacrifices because of the increased pressure on their household budgets.

People generally have limited understanding about why food prices are going up and feel disconnected from the complexity of food production. There was concern that while people on higher incomes could afford to make choices on other grounds, many people did not have this luxury.

As reflected in previous Which? research, many people had changed the way that they shopped for food in order to deal with rising food prices. This included shopping around more, doing more regular shops to keep track of spending and avoid waste and stocking up on products when they were on special offer. Some people, however, were suspicious of supermarket prices and price promotions and raised concerns about supermarket profit margins at a time when consumers and other players in the food chain were being squeezed.

The impact of the horsemeat scandal

- Confidence in food safety has taken a significant hit, dropping from 9 in 10 feeling confident when buying food in the supermarket in October 2012 to 7 in 10 in February 2013.
- There has also been a drop in consumers trusting the food/ grocery sector to act in their best interests (44 per cent in February compared to 58 per cent in January) and how protected they feel as a consumer (61 per cent in February compared to 74 per cent in January).
- Seven in 10 (68 per cent) think that the Government hasn't been giving enough attention to enforcing labelling laws.
- Six in 10 have changed their shopping habits in some way because of the horsemeat scandal.
- Four in 10 are now looking at ingredient labelling more on meat products, but half aren't confident that ingredient labelling (in general) is accurate.
- Thirty per cent are buying less processed meat and a fifth are buying fewer ready meals which have meat as an ingredient.
- A fifth of people say they are buying more meat from a butcher rather than a supermarket.

Issues that have become more or less important in the current economic climate



Consumer priorities

Limited awareness of the breadth of issues facing the supply chain

People in the Juries were generally surprised that experts felt that the food chain was reaching a critical point and had little awareness of the issues presented prior to the discussion, particularly in relation to concerns about the impact of climate change and increasing global demand on food choices and food prices.

People surveyed were most interested in the issues that impacted on them directly, rather than broader, less tangible, global issues. Ninety per cent of people were, for example, interested in the price of food increasing and 83 per cent in the impact of what they eat on their health. This dropped to 59 per cent who said they were interested in the amount of resources, such as land and water, that it takes to produce food; 58 per cent who were interested in the impact on the environment of the food they ate and 55 per cent who said they were interested in supporting farmers in developing countries.

While some people in the juries had been aware of climate change and food price changes, they had not linked these issues to a future food supply crisis. Many jurors were shocked at the information they heard and felt that it required immediate action.

“It’s a lot more urgent than you realise and we’re led to believe” Cardiff

People struggled to prioritise the issues, recognising that they were inter-dependant. Some felt that the environmental issues had to be given greatest priority as failure to do so would have severe consequences in the longer-term. Others felt that the scope for action in the UK was limited without action also being taken in other countries and the need for a co-ordinated approach was emphasised.

The jurors felt that the environmental impact of what we eat had not been given enough priority in the public consciousness and this needed to change.



Broad awareness of diet and health issues

One challenge that many people across the board were very aware of was the need to tackle obesity and diet-related disease. This reflects the extent of public debate around this issue in recent years.

Although people were generally aware of what they needed to eat to be healthy, some people struggled to put this into practice. Some of the main barriers to healthy eating that were highlighted were price, convenience and lack of information. People felt that less healthy options were generally far more ubiquitous, cheap and convenient than healthier choices which made self-control more difficult.

“You go to an end of an aisle and you see on offer - four doughnuts for a pound or four cakes for a pound - and like you say, ‘look at that’. You don’t see at the end of the aisle a display four apples for a pound or four bananas for a pound” Cardiff

“ A lot of the kind of information people got (about the environmental impact of food), they felt they hadn't heard before, it was news to them. We thought it should be more in the public domain ” Glasgow

Limited understanding of environmental impacts

Prior to the sessions, the people taking part had limited understanding of the way that food can impact on the environment and how climate change in turn is likely to affect the availability and price of food.

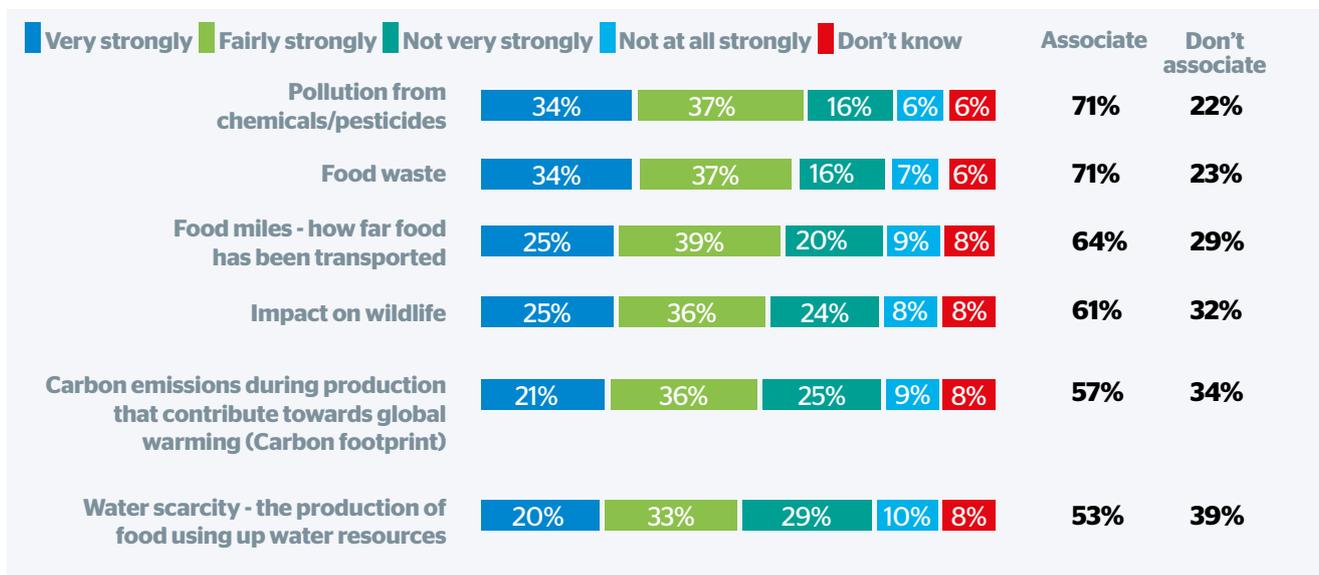
Environmental impacts were initially thought about in terms of issues such as food packaging, transport and recycling. There was very little awareness of the way that food production itself can impact on the environment. This was also reinforced by our survey, which found that most people were likely to associate the environmental impact with pollution and waste rather than water scarcity and food production using up resources.

Issues associated with the environmental impact of food

People in the juries were surprised by the significance of the contribution of food production to greenhouse gas emissions and few had ever considered the issue of embedded water. Once they had heard the information about different impacts, many people were very interested and felt that they would now think about this much more.

The need for much clearer information from the Government was highlighted. People were surprised that this was not talked about more. They wanted simple, straightforward information to help them make more informed choices on this basis.

Issues associated with the environmental impact of food



Improving consumer information

People felt that there was an urgent need for clearer, actionable information as most had been unaware of the issues discussed before the jury. People asked for information to be improved in a range of ways, potentially including:

- information through schools;
- a government information campaign;
- provision of information around supermarkets;
- television programmes on the issue;
- involvement of TV chefs and other celebrities to highlight the issues; and
- use of online tools and mobile phone apps.

Overall, however, people wanted much clearer information about the types of choices that they should be making and stressed the importance of labelling as the most immediate way people receive information about different food choices. Seventy one per cent of people in the survey said that products should be labelled more clearly to show their environmental impact.

“There should be universal labelling in supermarkets so thing.” Glasgow

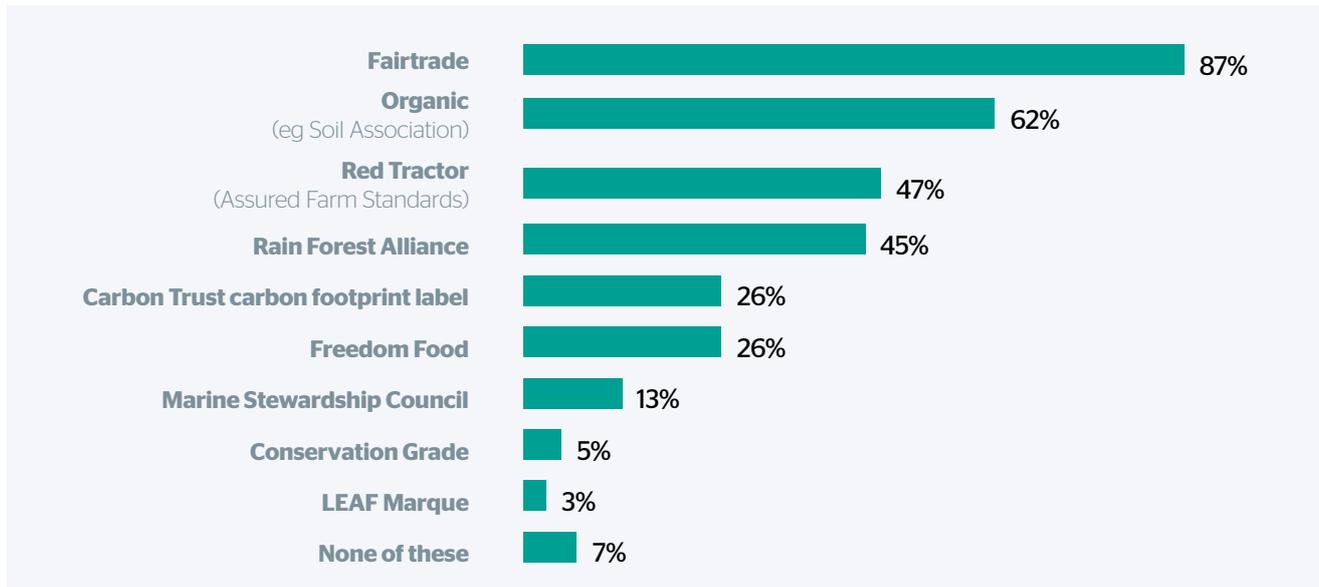
The potential for information overload was highlighted by several people in the Juries. Our survey found that there was limited awareness of some of the labelling schemes already on the market. This included some schemes that had been in use for a while such as the Marine Stewardship Council logo. In contrast, 87 per cent of people were aware of the Fairtrade logo on products.

There had, however, been an increase in awareness of some schemes from previous research Which? conducted in 2010²⁷. Although the methodology was different (a face-to-face survey in 2010 and an online survey in 2012), the research indicated that awareness of Fairtrade had increased from 82 per cent to 87 per cent; Organic from 54 per cent to 62 per cent; Red Tractor from 20 per cent to 47 per cent; Rainforest Alliance from 33 per cent to 45 per cent; Carbon Trust Carbon Footprint label from 21 per cent to 26 per cent; Freedom Food from 20 per cent to 26 per cent; and Marine Stewardship Council from 6 per cent to 13 per cent. The findings for the LEAF scheme were consistent with two years ago (3 per cent aware) and Conservation Grade had increased very slightly from 4 per cent to 5 per cent.

“There’s nothing to tell us how much of a carbon footprint one thing has over the other, all you have is the price and the country of origin but, as we’ve learned, that doesn’t necessarily mean it’s more or less damaging to the environment”  Cardiff



Awareness of existing environmental and ethical labelling schemes



Our latest survey also found that there are several areas where people feel that they need more information.

Areas where people think they need more information:

The quality of ingredients used	61%
Food safety standards	58%
Where the food is produced	53%
Nutritional content	51%
The method used to produce the food	50%
Animal welfare standards	50%

But just 38 per cent said they needed more information about the environmental impact of food. This shows the different way that people respond when provided with more detailed information, as in the juries.

Information needs to be simple, clear and easy to understand. The traffic light labelling scheme for the nutritional content of food was highlighted as an example of the type of approach that was needed.

“With regards to the environment stuff, you know with health and diet, they started putting on the traffic lights. And even if you didn’t know what the traffic lights meant, because you saw it on everything most people just thought ‘okay’ and then you asked questions and that’s sometimes how you’re educated.” London



Approaches to producing more food

The need to produce more food sustainably and the different approaches that could be adopted were considered by the juries, helped by expert evidence. They considered issues such as the extent to which the yields of crops could be improved, existing knowledge better shared, waste reduced and whether there was a need for new approaches and innovation. The latter including the role of new technologies, such as genetic modification of crops to enhance yields or grow crops in places where this is currently not possible.

The most acceptable approaches were generally solutions that were focused around reducing waste, increasing productivity by sharing best practice based on existing production methods and knowledge and consuming less resource intensive foods.

“It’s like what we say about waste, we’re all saying that we’re not making enough food, that there’s not going to be enough food, but there’s so much about waste coming up.” Belfast

There was a divergence of views over the role of innovation. Some people thought that the application of science and technology was fundamental and part of progress.

“We’re going to have to take a calculated risk to do something about this problem and then hopefully, as nearly always, science will have to work harder to come up with solutions for any problems that arise.” Cardiff

Others disagreed and were concerned that some technologies would be unnatural, unethical and were therefore too risky as there could be no going back once they were adopted.

“We don’t know with this genetically modifying or cloning things, where that’s going to lead. In thirty years’ time it might mean that we’ve altered the whole face of the planet with insect life and soil structure.... I don’t think we should be mucking about with nature.”
Glasgow

Two thirds (65 per cent) of people in our survey were concerned about the long-term safety consequences of new technologies. However, 46 per cent agreed with the statement “I am generally happy about the use of new technologies to produce food.” Overall, people thought that a mix of approaches was needed and that it was important to exploit existing knowledge and skills as well as carry out new research.

“Taking the bits and bobs and different things as well and using the most effective and efficient ways from... tried and tested methods from all these different ways.”

Cardiff

There was also strong support for British farming in the juries and concern about the potential impact on farmers’ livelihoods. This was particularly the case in the Belfast and Glasgow juries where jurors expressed concern about the impact of any scaling back of livestock farming.



Acceptability of new technologies

Some people in the juries did not rule out the use of new technologies, including GM, completely but their acceptability depended on several conditions being met. These included:

- that risks are fully and independently researched and understood;
- that the potential to enhance more traditional approaches is fully explored as the first option, for example in order to address yield gaps;
- there is much greater transparency about the potential risks as well as about regulatory oversight;
- a clearer understanding of the relative risks and benefits - some highlighted the need to balance short term risks with longer-term risks of food availability;
- there is not over-reliance on one particular approach or solution - a range of solutions are needed;
- the commercial interests of large multi-nationals should not be the main driver of innovation and developments need to be controlled by government to ensure that they are focused on the public interest; and
- avoiding false promises - new technologies proposed need to be realistic and offer real benefits for UK consumers.

Greater transparency was a key theme - and also emphasised in the survey. Fifty five per cent of people agreed that if they were informed about the processes involved (eg. how they are produced and safety tests), they would be more accepting of new technologies.

“There needs to be research and it needs to be transparent research and it needs to be honest research ... it needs to be honest and everything put in the public domain.” Belfast

The perceived risks relative to potential benefits is also a key consideration. Fifty four per cent of survey respondents said they would be more accepting of the technology if there were clear consumer benefits. Half of people (49 per cent) said that they would accept the use of a new technology if food was cheaper because of its introduction. Who was in charge of the research and oversight of the technology was also important for the jury participants.



“ We’re from a farming nation and very proud of it. And if we’re saying that we eat a lot less of that, then we’re going to have to give our farmers something else to do. We can’t just say “that’s it, the industry’s gone”, we need to think about it ” Belfast

The role of government

Across the juries, people looked to the Government for leadership in tackling these issues. People felt that the Government needed to be much more open about the way that these issues were coming to a head. Most wanted the Government to intervene more in order to ensure the necessary action was taken across the supply chain.

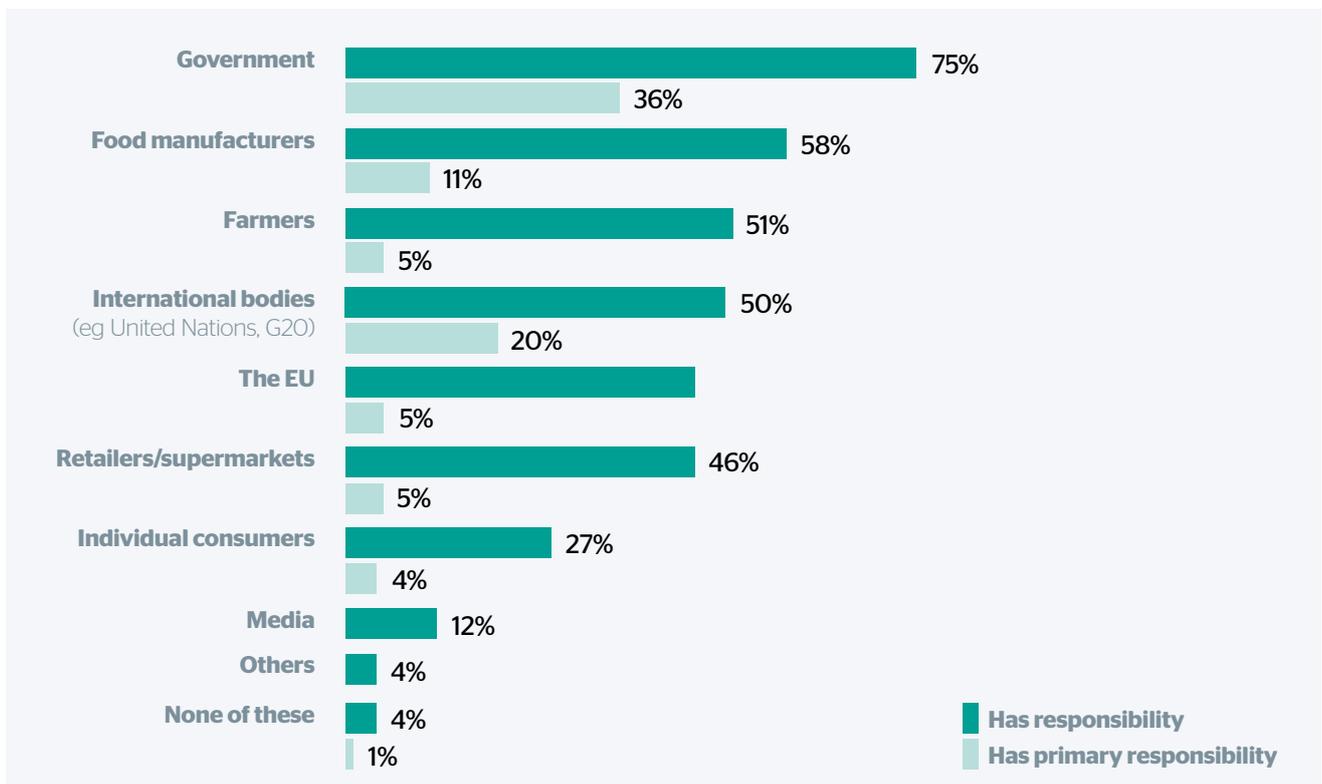
When asked about different influencers, three quarters (75 per cent) of people in our survey thought that the Government should be responsible for how enough

food will be produced in the future and 58 per cent thought that manufacturers should be responsible.

The main actions that people across the four juries wanted from the Government are summarised below. Top of the list was the need to develop a clear strategy or action plan and be much more open with the public about the issues that need to be addressed. Eighty per cent of people surveyed also wanted there to be a clear food strategy from the Government on what should be done.

“You really need someone in Parliament, one individual or a department, focusing on this, don't you? Focusing on this issue and having a plan and a strategy” 

Views on primary responsibility for ensuring food security



ACTIONS RECOMMENDED IN THE CITIZENS' JURIES FOR THE GOVERNMENT

- To develop a clear action plan.
- To be honest and open about the issues.
- To co-ordinate and invest in research for improvements to existing production methods as well as new methods in a way that is transparent.
- To ensure that there is sufficient independent and regulatory oversight for new technologies and innovation.
- To ensure that the public is consulted on the introduction of innovations that have the potential to be contentious.
- To initiate a comprehensive information campaign.
- To improve education about these issues in schools.
- To curb irresponsible speculation on commodity markets which some see as exacerbating food prices.
- Ensure transfer of knowledge within the UK as well as overseas.
- To provide information and support for farmers to learn new skills.
- To work with other countries to develop a global production and consumption strategy.
- To sponsor community initiatives, eg. grow your own.
- To consider ways of helping keep the cost of healthier/ more sustainable choices lower, eg. fruit and vegetable vouchers.
- To review product labelling.



There was a strong sense, however, that the UK could not act alone and that all countries had to recognise the need to act. Eighty six per cent of people in the survey thought that all countries should act, not just the UK.

The role of the food industry

There was some suspicion among jurors about the motives of supermarkets and food manufacturers, but overall, they were seen as having a key role. Supermarkets were seen as powerful players in influencing both the supply and demand for food. Confidence in the grocery sector has, however, fallen since the horsemeat saga.

People felt that everyone needed to make some changes, but too much emphasis should not be put on consumers, relative to the changes that farmers, retailers and manufacturers also needed to take. There were mixed views on the role that price can play as a way of changing people's food choices - with scepticism about how foods could be priced differently to take account of their health or environmental impacts by some, as well as concern about too much intervention by government.

Price was, however, recognised as the main mechanism by which food choices can be influenced. Other forms of 'choice editing,' where retailers or manufacturers change foods to improve their environmental or health credentials 'behind the scenes,' received a mixed response. While some were comfortable with the idea that some choices may need to be restricted if they were ultimately unsustainable, others were less comfortable with this idea. They questioned who would make these decisions and on what basis.

Across the juries, parallels were drawn with issues such as recycling and smoking, where societal norms had shifted considerably in recent years. The need for collective action led by the Government was therefore emphasised.

The main actions people in the juries wanted from supermarkets, food manufacturers and producers are summarised on page 31. This includes reducing waste, but also looking at issues such as pricing policies, formulation of products and consumer information.

“ Supermarkets basically hold all the aces at the moment and unless they're persuaded to change how they deal with our food consumption nothing much is going to change ” Cardiff



The need for information was emphasised, including the importance of simplifying and consolidating labelling schemes. But it was acknowledged that information alone was not enough. A longer-term change to the way that we value food and its short and long-term costs would be required

ACTIONS RECOMMENDED IN THE CITIZENS' JURIES FOR THE FOOD INDUSTRY

Supermarkets:

- To reduce waste.
- To have fewer special offers and promotions on unhealthy/ unsustainable foods and focus them more on healthier and more sustainable products.
- To support local producers.
- To pay a fair price to producers and be more transparent about food pricing.
- To provide in-store information.
- To make imperfect foods available, acceptable and cheaper.
- To reduce the number and range of products on offer where they are unnecessary.
- To act with integrity to help tackle the problems even if this means reduced profits.

Food manufacturers/ producers:

- To reformulate products to reduce salt, fat and sugar and produce more sustainable products.
- To provide consumer information.
- To reduce waste and packaging.
- To be considerate to animal welfare.
- To be more cautious about the use of pesticides and other chemicals.
- To use the most efficient techniques and build up their skills to maximise production.

ACTIONS RECOMMENDED IN THE CITIZENS' JURIES FOR CONSUMERS TO TAKE

- Reduce household waste.
- Change food choices to more sustainable ones.
- Educate the next generation.
- Have one meat/ dairy free day per week.
- Be more aware of your carbon footprint.
- Eat more foods in season.
- Buy more locally produced foods.
- Consider re-balancing diets.

Changes to personal food choices

People who took part in the juries felt that they had been changed by the experience. By the end of the second day, the large majority of people across all four juries felt that they were definitely going to make some changes to the food they buy and eat.

"I just think people will have to accept that you've got to change, it's as simple as that...Looking at that information from yesterday, it's a bad situation and I think accepting that you just have tomatoes in the summer is an easier option than thinking there's going to be nothing left." London

The most common changes mentioned were thinking more about where their food has come from and how it has been produced, considering changing the balance of what they eat (eg. less meat or dairy or more fruit when it is in season) and reducing how much food they waste. People recognised how ingrained food purchasing behaviour can be and how much it is influenced by cultural and societal norms and habits and how good intentions may not always follow through in the supermarket.

"I will buy less. I don't need half of what I buy but because it's on special I do.. and waste it." Glasgow

"I feel as though I will change, but will not know until I'm in the shop purchasing my food." London

Many felt that they knew what they should be eating to be healthy, but still struggled to put this into practice. Income constraints also meant that for some people price would always outweigh health, environmental or other factors.

The need for information was emphasised, including the importance of simplifying and consolidating labelling schemes. But it was acknowledged that information alone was not enough. A longer-term change to the way that we value food and its short and long-term costs would be required.

"I don't think that we're saying that we don't want choice, we're saying that we probably don't need as much choice." Glasgow

Conclusions and implications for policy

Since we conducted our research, food issues have dominated the headlines. The contamination of meat products with horsemeat brought some of the challenges facing how we produce foods starkly into the spotlight. Many lessons need to be learned from the scare, including the importance of consumer acceptability of food production processes, the cultural aspects of what we eat and the need for robust, effectively enforced food labelling rules and standards so that people know what they are eating.

The horsemeat fiasco has also reinforced that we need to think very differently about the food supply chain. Greater consideration has to be given to the long-term costs of changes to how we produce food as well as those in the short term. There needs to be much more transparency about how food is produced and what consumers are really getting for their money.

The more specific regulatory issues that need to be addressed are shown on page 45, but the widespread, illegal contamination has also highlighted the need for a much more joined up approach to food policy in general. Although it is the responsibility of food businesses to produce safe food and ensure the integrity of their supply chains, the scandal has also shown that people look to the Government for leadership and to ensure that people can have confidence in what they are eating.

Food has to become a greater political priority and consumer interests need to be given much greater prominence. The way that food issues are handled within government also needs to be reformed to ensure that there is a much more joined up approach and that consumer interests are at the heart of decision-making.

The lessons from the horsemeat affair are, therefore, also pertinent to the wider challenges facing the supply chain. Global pressures such as the impact of climate change, increasing demand for core food commodities and rising costs, require a re-examination of how food is produced. More food has to be produced in a way that minimises the environmental impact. But this can't be done in isolation from other priorities, such as helping people to eat healthily and reducing rates of obesity and diet-related disease, ensuring food is the quality that people expect, respecting wider social and cultural aspects of what we eat – and ultimately ensuring that food is affordable.

Giving greater priority to consumer interests

The Government has acknowledged the need to think differently about how we produce food. The Foresight report on the Future of Food and Farming² set out the need to think radically about how we produce food in the future. But consumer interests are not being given enough priority by decision-makers. There is a lack of consumer focus in the way that policy is developed, the way that responsibilities are split across government and a more general failure to listen and respond to consumer views about the different issues that need to be addressed.

The Which? food debate found that many people are unaware of the wide range of issues that could impact on the types of foods that will be available in the future. People were surprised that they had not been told about issues such as the impact of climate change and felt that there needed to be much more openness about the potential role that new technologies could play.



Conclusions and implications for policy

The main initiative to respond to the challenges facing food supply and demand is Defra's Green Food Project²⁸. This is focusing on what food production should look like in the future, but has so far been focused primarily on producer interests and environmental impacts. Consumer interests are now being looked at, but as more of an "add on", rather than as integral to the way food is produced. Other areas of food policy that impact on consumers such as nutritional quality, food safety and quality are not being considered as part of this Project - although it is currently the only Government initiative aimed at developing some form of action plan for food production.

At all levels, producer interests are generally dealt with in isolation from consumer interests despite various attempts over the years to try and ensure that the food chain and policy making is more integrated and market focused.

Consumer interests have also been down-graded in the way that food issues are handled within more specific government policy areas and departments. The Food Standards Agency which was set up after the Bovine Spongiform Encephalopathy (BSE) crisis to put consumer interests first²⁹ has been stripped of many of its responsibilities.

A more general government focus on prioritising economic interests and reducing regulatory burdens has also lost sight of the negative effects a poorly regulated food chain can have for the food industry as well as consumers. Initiatives such as the 'one in; two out' approach to regulation has resulted in an approach where regulation is largely seen as negative. This focus on light touch regulation, combined with an emphasis on reducing the burden of enforcement, is undermining consumer protection - as the horsemeat saga has shown so clearly.

The cost of losing consumer confidence

Failure to respond to consumer interests is not only damaging for consumers themselves, but will also be expensive for the food industry, wider economy and the Government. The horsemeat scandal has shaken consumer confidence in the food industry and in food safety.

A recent Which? survey found that 44 per cent of people trusted the food/ grocery sector to act in their best interests in February, compared with 56 per cent in October last year. Just 7 in 10 people have confidence in food safety when buying food in the supermarket, compared with 9 in 10 before the horsemeat scandal.

This break down in trust is also affecting the types of products that people are buying with 6 in 10 people saying that they have changed their shopping habits in some way because of the meat scandal. A fifth are buying less processed meat; a fifth are buying fewer ready meals which have meat as an ingredient and a fifth say that they are buying more meat from a butcher than a supermarket.

Consumer interests therefore need to be central to decisions about how food is produced and how the food supply chain is governed. Action to address this is needed in the following five areas.

1 Strong Government leadership and a clear food strategy

Food issues are currently dealt with in a fragmented way with no clear sense of overall direction and priorities. Responsibility for food issues is spread around several government departments and Ministers. Much of the responsibility falls to Defra in England, but the Department of Health also has a role - and so does the Department for Business Innovation and Skills. More specific regulatory and policy issues fall to the Food Standards Agency.

The issues that are facing the food supply chain require much stronger Government leadership. The Which? consumer research, shows that people will ultimately always look to government for direction in this complex and interconnected set of issues. Tough decisions need to be made about how we produce food in the coming years. Global food shortages, exacerbated by food's contribution to climate change and increased demand in countries with emerging economies, means that more food has to be produced with fewer resources

The issues that are facing the food supply chain require much stronger Government leadership. The Which? consumer research shows that people will ultimately always look to government for direction in this complex and interconnected set of issues



Conclusions and implications for policy

At the same time, food has to be affordable, healthy and safe - as well as meeting our wider cultural and social expectations as the horsemeat incident starkly demonstrated.

A cross-cutting approach is needed to tackle these many challenges that will impact on consumers in the coming years. A much clearer vision and strategy is needed for the types of production that we should have in the UK to meet our needs and how to put this in place. Wider stakeholders need to input into this and will be largely responsible for putting any strategy into practice. But it is the responsibility of Government to set out the priorities and ensure action.

Existing policies

Some food policies and strategies do exist, but only in some parts of the UK and only addressing part of the picture. Scotland has a "Recipe for Success" food policy³⁰. Wales has a "Food for Wales, Food from Wales" strategy³¹. Northern Ireland has a food policy which is under review, but is currently narrowly focused on promoting the food industry³².

England has no food policy at all. Defra oversees the Green Food Project, but this does not address aspects of food policy, such as nutritional need and affordability, and does not include other government departments that deal with them. A separate Department of Health Public Health Responsibility Deal³³ is taking forward actions around diet and health, following on from the Government's Public Health White Paper³⁴ and Call to Action on Obesity³⁵. But so far the Pledges that have been agreed as part of this are quite narrowly focused and Which? has called for broader action and a more ambitious approach³⁶.

There are also no co-ordination mechanisms in place to try and ensure that a consistent approach is adopted across these different government departments and agencies. A Cabinet Sub-Committee on food in England and a task force made up of senior civil servants across government departments were in place, but have both been disbanded.

A much clearer vision and strategy is needed for the types of production that we should have in the UK



Wider fragmentation

There is similar fragmentation of food issues at EU and wider international level. The Common Agriculture Policy (CAP) takes up around a third of the total EU budget. It is currently under-going another stage of reform that began with the stated aim of “greening” the CAP³⁷, but it is unlikely to make any fundamental changes. Besides the CAP, there is no wider EU food policy, although the European Commission is scheduled to consult on a possible Communication on Sustainable Food in 2013³⁸. At international level, food policy also cuts across different United Nations bodies: the Food and Agriculture Organisation, World Health Organisation, their joint food standards body the Codex Alimentarius Commission and the United Nations Environment Project for example. But again, there is no unifying framework.

ACTIONS NEEDED

- **The Government needs to show much greater leadership on food issues, developing a much clearer government vision for what the food system should look like in the coming years. Consumer interests have to be central to this.**
- **An over-arching food strategy needs to be developed for England which sets out the main objectives of food policy and production. Issues relating to food production and consumption need to be brought together to ensure that the food system is able to respond to consumer needs and takes account of what people find acceptable to eat.**
- **Policies already exist in other parts of the UK, but these also need to be reviewed and followed up with clearer action plans for how to address the challenges that are facing the supply chain and address potentially conflicting priorities.**
- **More formalised co-ordination mechanisms need to be put in place across government departments with food responsibilities to ensure that this strategic approach can be delivered.**

2 More effective consumer engagement on food issues.

The horsemeat scandal has shown, once again, that the way that our food is produced can be very different to what we expect. It is therefore essential that consumers are consulted on the different challenges facing the food supply chain and that their views are reflected in Government policy.

The Which? research emphasised how there has been little, wider public debate around the many issues facing food production. Consequently, there was little public awareness of many of the issues presented in the Which? citizens’ juries. But once the issues were explained, people became engaged, expected action and thought that other people needed to know about them too.

Limited consultation

Some public engagement activities have been initiated into issues around sustainable food production in order to feed into research priorities. For example, the Government’s Global Food Security research programme has conducted research to understand consumer perspectives³⁹. Some Government research has been conducted to better understand consumer behaviour in relation to more sustainable choices and in relation to specific new technologies⁴⁰. A public debate around genetic modification was held back in 2003, but it was narrowly focused and a lot has changed since then⁴¹.

Defra’s Green Food Project looks at how more food can be produced sustainably. The next phase of this Project includes a work strand around facilitating a wider, more sophisticated debate across the whole food chain about the role that diet and consumption play in the sustainability of the food system. But the approach to this is still being developed.

Meaningful engagement

Behavioural change is an important aspect of public engagement. Foresight for example recognised that while a lot can be achieved by focusing on production, consumers can also bring about change through the food choices they make. But public engagement is also needed in order to ensure that consumers have a say in where the balance between the competing demands that need to be addressed across the food system should lie – and therefore to enable a meaningful choice. The horsemeat incident has for example highlighted how the drive to cut costs can have negative consequences, making food

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supply chains convoluted and more open to fraud. It is therefore important that public consultation and engagement activities feed into Government policy making, including decisions about the role of new foods and technologies.

ACTIONS NEEDED

- The Which? Food Debate should be the starting point for a much broader based public engagement initiative around the future of food. This needs to take the challenges facing the food supply chain beyond limited or single-issue policy discussions in order to fully explore the questions raised and the possible solutions. This should feed into the Government strategy that needs to be developed and should build on the deliberative research methods used by Which?.
- As part of this, there needs to be a much more transparent and open exploration of the role of new technologies compared to other options for UK food production going forward. This includes addressing research needs and ensuring consumer choice.

3 A more consumer-focused Defra and a strengthened Food Standards Agency.

A coherent and joined up approach to how food issues are dealt with across government that recognises the need to prioritise consumer interests is essential. But the responsibilities of the Government departments and agencies that deal with food are also important. Consumer interests have to be systematically taken into account by all government departments that deal with food issues. They can no longer afford to be treated as an optional extra. The full ramifications of the horsemeat scandal have still to be seen. But the lessons learned are very similar to those that were highlighted by the BSE crisis and led to the creation of the FSA.

The FSA was created with an independent board and a clear responsibility to protect consumers. It was required to be independent, to be evidence-based and to operate openly and transparently. It had responsibility for food safety, food labelling and standards and nutrition issues. There was also a focus on ensuring that food issues were joined up across the supply chain – a plough to plate approach.

The FSA was set up to be at arms' length from government, but still part of government. The BSE crisis had highlighted the risk of having food safety and standards issues dealt with by a government department (the Ministry of Agriculture, Fisheries and Food which was replaced by Defra) that had dual responsibility for protecting consumers and promoting the food and farming industries. Consumers need to have confidence that at a time of crisis – whether the discovery of BSE, illegal horsemeat or whatever the next food scare will be – action to protect consumers will not be delayed because of fear of damaging the food industry in a time of economic crisis.

Government restructuring

Machinery of government changes in 2010 meant that many of the FSA's responsibilities were reduced. Food labelling and standards policy for England is now once again with Defra. Nutrition policy for England has moved to the Department of Health.

A complicated picture also emerges across the UK as a whole. The FSA in Scotland still covers food labelling, standards and nutrition issues for the moment – but this will change when a new Scottish food agency, which has been announced by Scottish Ministers, is up and running. The FSA also has responsibility for all three areas in Northern Ireland and has responsibility for labelling and standards, along with food safety, in Wales.

The FSA retains responsibility for enforcement aspects of food labelling and standards, as well as food safety, even where it does not have policy responsibility. This is delivered on the ground through local authority trading standards and environmental health departments and port health authorities. The FSA also has responsibility for the Meat Hygiene Service which is responsible for enforcement in meat plants.

At a time when food policy needs to be coherent and focused on the longer-term challenges as well as short term problems, a more fragmented approach is therefore emerging.

The Which? Food Debate should be the starting point for a much broader-based public engagement initiative around the future of food



ACTIONS NEEDED

- Consumer interests need to be given greater priority across all Government departments. Defra needs to more explicitly recognise its responsibility to consumers as well as to producers.
- A review of food policy responsibilities is needed so that the institutions and structures dealing with food issues are fit to deal with the challenges over the long-term, co-ordinated and ensure that consumer interests are prioritised.
- Nutrition, food labelling and standards policy need to be returned to the FSA in England and nutrition policy to the FSA in Wales.
- The new food agency to be established in Scotland must be independent, open, transparent, put the consumer first and have effective ways of co-ordinating work, expertise and intelligence with other parts of the UK.
- Regulation should not automatically be seen as a burden and a light touch approach to enforcement needs to end. Effective, targeted controls across the supply chain benefit consumers and the food industry. They must be effectively implemented and enforced so that there are much stronger deterrents for failure to comply with legislation and deliberate fraud.
- The review of key pieces of legislation at EU level during 2013, should be used as an opportunity to strengthen, not weaken consumer protection. The EU review of hygiene legislation should ensure that adequate controls are in place, including in slaughterhouses and the EU novel foods regulation and proposed legislation on cloning should ensure there are robust safety assessment and approval systems in place that also respect wider consumer concerns and demands for choice.
- Obesity and diet-related disease is such a major public health issue that the Government should regulate to achieve food industry change where insufficient action is taken voluntarily.

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Approach to regulation

Besides the structural changes, there has also been a change in emphasis. Reducing regulatory burdens and light touch enforcement, have become the dominant focus. A lot of trust has been put in food industry controls. Implementation of new EU food labelling rules, for example, look set to relax what is considered a criminal offence under the law. Based on Defra's consultation on how it intends to implement new EU labelling rules⁴², only failure to label food allergens will be an offence in England, not wider misleading labelling practices. In contrast, the status quo will be maintained in Scotland⁴³. The horsemeat contamination across the food industry has shown just how short-sighted this approach has been, paving the way for fraud where there is an opportunity to make money and few sanctions to prevent it.

There is a large body of food legislation in place, which is mainly decided at European level. Following the BSE crisis, safety controls were enhanced, traceability was made a legal requirement and the precautionary principle was enshrined in legislation⁴⁴. But the horsemeat saga has highlighted that weaknesses remain and that as the food chain becomes ever more complicated, regulations need to be adapted. In this case, more specific rules covering traceability are needed, backed up by wider company testing to verify the authenticity and safety of ingredients.

Important EU legislation is under review in 2013 and so the UK needs to ensure that the outcome is consumer-focused. EU hygiene legislation will be reviewed during 2013, including controls over meat inspection in slaughterhouses. This provides an opportunity to ensure a risk based approach while maintaining sufficient government controls to ensure that people are adequately protected.

The Government is placing greater emphasis on the role of new technologies to help ensure that there is enough food in the future. But the regulations covering new technologies are incomplete. While GM foods are subject to pre-market assessment and approval before they go on the market, there is not the same requirement for foods and ingredients from cloned animals or produced using nanotechnologies. EU framework legislation for food law, recognises that legislation should be science based and EU-wide safety assessments are now largely conducted by the European Food Safety Authority. But it also recognises the importance of taking into account other legitimate factors, such as social and ethical concerns.

The Government's main approach to tackling obesity and diet-related disease is the Responsibility Deal,



based on voluntary company pledges in areas such as reducing salt, calories and giving calorie information in restaurants. There are currently no sanctions for companies that do not commit to act.

Legislation also needs to be implemented. But resources for food law enforcement are also being depleted at the same time that food fraud incidents are on the increase. The contamination of beef products was initially picked up by the Food Safety Authority of Ireland, which reinforces the importance of pro-active surveillance.

4 A greater Government focus on clear pricing and long-term affordability.

The Which? research showed that many people are concerned about rising food prices. This is dominating many people's choices and many people are having to change how they shop for food because their budgets are squeezed. People on lower incomes, who spend a larger proportion of their income on food, are being hit particularly hard.

Other issues are also important, such as food quality and taste and people want to know that they are getting value for money, but overall the research showed that many people were having to trade down. They are doing this by changing where they shop for food as well as the types of products that they are buying.

After hearing about some of the pressures facing the food chain, people recognised that some of the longer-



term costs of the food choices we make, such as the health and environmental impacts were not always obvious. Many people said that they would try and make more sustainable choices when they shopped for food, but this was difficult when faced with the choices available in the supermarket, including the many products on promotion.

The Which? research conducted following the horsemeat scandal²⁵ has also shown that many people are thinking again about whether it is really worth buying cheaper meat products if you can not be sure what they contain. Many people say they are buying less processed meat products as a result.

Greater transparency

Our research has reinforced the need for much greater transparency about the price of food so that people understand what they are really paying for. There needs to be greater transparency about how prices are spread across complex supply chains and how products compare so that it is easy to see what is really best value for money.

It also needs to be much easier for consumers to compare the price of different food products. Although unit pricing is required, Which? research has shown that this is not always presented prominently, clearly or consistently.

Price promotions can also be confusing regardless of whether the unit price is shown⁷. Pricing legislation and retailer best practice therefore needs to be improved so that it is simple and straightforward to work out which products are the cheapest. The Office of Fair Trading has

recently updated guidance on special offers⁹. This needs to be effectively implemented and monitored to ensure that special offers on food in supermarkets offer consumers genuine savings.

Longer-term costs

The longer-term costs of how food is produced also need to be more explicitly considered. The wider public debate that is needed should, for example, address some of the choices that we are making and how price should be balanced against other factors, such as food quality, supporting local producers, food safety, health and environmental consequences. The impact of food prices on the types of choices that people are making, for example, switching to less healthy choices and greater reliance on food banks for some people, also needs to be considered.

Many of the factors that are driving food prices, such as the changes to global demand, supply shortages and the impact of climate change are difficult to solve. Factors that are exacerbating them such as speculation on commodity markets and biofuel policies can be more easily addressed through government policies, but also require action at a global level. Ultimately, the joined up food strategy,

ACTIONS NEEDED

- Food retailers need to improve unit pricing across the board to ensure that it is clearly legible and consistent so that consumers can easily compare prices. Much of this can be achieved on a voluntary basis, but the Government should also revise the Price Marking Order to ensure that there are no barriers to use of consistent units.
- The Office of Fair Trading's guidance on special offers must be effectively implemented and monitored to ensure that supermarket special offers are genuine.
- The Government should work with the food industry to improve the transparency of how prices are transmitted across different supply chains so that it is ensured that consumers are paying a fair price for food.
- A Government food strategy is needed to help tackle the underlying causes of rising food prices and ensure consumers have access to healthy, affordable food in the longer-term.

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along with much stronger government leadership, should give a greater focus to tackling the need to increase food production, reduce waste and mitigate the environmental impact of production, while also respecting other issues that influence food acceptability.

5 Enabling consumers to make healthy, sustainable and informed choices.

It is essential that consumers have a meaningful choice over what they eat. Consumers need to be effectively involved in decisions about the future of food and how it is produced. They also need to have clear, reliable information about what is in food, where it comes from and be able to compare prices and value.

The Which? research showed that many people are unaware of the mix of issues affecting how we produce food, their urgency and how to act on them. The horsemeat scandal also highlighted the complexity of food production and supply chains with the ingredients used in food potentially coming from many different suppliers and countries. The ingredients themselves may not always be what consumers expect. Apart from the substitution of horse for beef in many products in order to cut costs, the scandal has also highlighted how meat itself may not be what consumers expect and that the origin is not always clear enough.

The horsemeat scandal has also demonstrated that it is essential that there is effective traceability of ingredients in food. There are EU requirements in place for traceability⁴⁴, but these are limited to a 'one up, one down' approach, requiring knowledge of who is supplying you and who you are then passing the product on to. It is essential that food manufacturers know the origin of their ingredients across the breadth of their supply chains so that they can assure consumers of the quality and choice of food that they expect. The scandal has also highlighted that testing of food to ensure its authenticity is needed to supplement traceability systems and help guarantee what is in food products.

Addressing the gaps

The last few years have seen a lot of focus on improving food labelling. The EU food information regulations were adopted in 2011 and will come into effect in 2014²⁰. These clarify how information is presented to ensure that it is more legible, as well as extending rules on origin, ingredient and nutrition labelling.

The horsemeat scandal, however, illustrated that adopting laws alone is not enough, it is essential that there is effective implementation and that local authorities have the resources to carry out effective enforcement. This includes ensuring that there is pro-active surveillance so that food fraud is picked up and dealt with.

The issues that will impact on consumers in the coming years, also mean that the information people will need is changing. Origin is, and will remain, an important issue for consumers. Our research showed that many people want to know where their food comes from and this is often because they want to support local producers. But despite the recent changes, many foods and ingredients still do not have to label the country of origin. All meat will have to give the origin, but not the meat in meat products, for example, which remains voluntary.

Ingredients labelling has been expanded, but laws about how food is described can still be confusing. Although there is a general requirement that food information should not mislead as to the nature, quality or substance of what we eat – this is open to interpretation. Meat labelling rules have been strengthened over the years – but meat can still be different from what is expected. This can be a particular issue for products sold out of home, such as in catering outlets, where information about added water, for example, does not have to be passed on to the customer.



Price is such an important issue to many people when they are choosing food, but the way that supermarkets price food is not always clear and transparent

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Enabling healthy and sustainable choices

There are many environmental and ethical labelling schemes on the market, including organic, Freedom Food and Fairtrade. The Which? research showed that there is generally low level of awareness about many of these schemes and confusion about what they mean. In particular, it can be difficult for people to make informed choices about the environmental impact of their food choices, although this will become an increasing focus in the coming years.

The schemes that are on the market tend to cover different environmental impacts, rather than taking a more holistic approach. Where information has been provided, the context has sometimes been lacking. Some food products have, for example, carried a carbon footprint label, but without any understanding of the significance of the value shown, its usefulness has been questioned. There is therefore a real opportunity to develop a more user-friendly and consistent approach to labelling. Work is under way at European level to develop environmental footprinting. There has also been a lot of debate around potential 'eco-labels' that could be applied to food, but there are no clear proposals. A Communication on Sustainable Food is however due to be published in 2014, with an initial public consultation in 2013.

The results of our Debate highlight that this is an area that people are interested in, but only if labels mean something and are easy to use. This was reinforced in previous Which? research²⁷ and in both cases, the Fairtrade label has stood out as being much more widely recognised and understood. There, therefore, needs to be much clearer information and advice from the Government on how people can make choices that are both healthier and have a lower environmental impact.

Advice around what to eat to be healthy has existed for some time. The Government's 'Eat Well' plate⁴⁵ sets out the balance of different types of foods that people should eat in order to maintain health. The advice around what to eat in order to have a lower impact is, however, less well developed. Several expert groups have stressed the need for clearer and more joined up advice, particularly as there can be a lot of synergy between what to eat to be healthy and to have a lower environmental impact. But this is a controversial area, particularly in relation to advice around meat and dairy consumption.

Our research showed that people were more aware of diet and health issues, but felt that unhealthy choices were too often the easier choice. The food industry was seen as having an important role in making it easier to eat healthily as well as more sustainably. This includes steps such as further reduction of fat, sugar and salt levels in foods, use of

traffic light labelling to indicate the level of nutrients across the board and more responsible promotions - including price promotions. People in the Which? juries also wanted help from the Government and food companies to make more sustainable choices. Lessons should therefore be learned from action to help people make healthier choices.

New technologies

Addressing the need to ensure enough food in the coming years, may also mean an increasing focus on the role of new technologies. It is therefore essential that consumers have a choice through clear labelling and the continuing availability of meaningful alternatives. With ever lengthening supply chains and different regulatory regimes in countries outside the EU, which do not always recognise the need to treat these technologies differently and give consumers a choice, it is essential that there are effective traceability systems in place and monitoring of their longer-term consequences.

ACTIONS NEEDED

- Recent revisions to food labelling legislation need to be effectively implemented, including provisions around improved labelling clarity and extension of ingredients and origin labelling.
- Country of origin labelling needs to be extended to a wider range of foods and all production methods that may be of interest to consumers, eg. use of animal cloning, must be clearly indicated.
- There needs to be much clearer, joined up advice to consumers about how to eat healthily and more sustainably. This should form the basis of more user-friendly labelling schemes. The Government's Eat Well plate needs to be reviewed by an independent expert group in order to give people advice about what to eat in order to be sustainable and healthy.
- More action is needed by the food industry and government to help consumers make healthier and more sustainable choices, building on initiatives such as salt reduction and traffic light labelling and tackling issues such as price and availability, including the balance of foods included in promotions.



HORSEMEAT - LESSONS TO BE LEARNED

■ **More surveillance that's better coordinated:** With food fraud surveillance work suffering from cuts in the UK, there needs to be more intelligence-led and speculative surveillance where there's a potential for cheaper ingredients to be substituted. The Government must set out how the Department for Environment, Food and Rural Affairs (Defra) will improve coordination with the Food Standards Agency (FSA) and local authorities.

■ **Tougher enforcement:** There needs to be clear disincentives for illegal practices with tough penalties for those prosecuted. The Government should immediately scrap their proposals to decriminalise failure to comply with food labelling legislation.

■ **Tighter legislation:** The food industry needs to improve traceability and regularly test its products. The Government should extend the FSA's powers to require testing when necessary, publish testing results, and allow its officers access to food premises for the purpose of investigations.

■ **Improved food labelling:** Consumers should be able to find out what's in their food and where it's from. The Government should push for the EU-wide country of origin labelling to cover processed meat used in meat products, like ready meals. It should also scrap its plans to drop national rules requiring clear ingredient labels for meat sold loose, such as in a delicatessen.

■ **Return food labelling policy to the FSA:** The FSA deals with enforcement, but in England responsibility for all food standards and labelling issues has moved to Defra. The scandal shows this split causes unnecessary confusion and complication. The Government should now move responsibility for labelling and standards responsibilities back to the FSA.



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