



Food, Farming & Countryside Commission

Growing a mandate for change



RSA
21st century enlightenment



Foreword by Sir Ian Cheshire

As the UK negotiates its future relationship with the European Union and the rest of the world, we face serious questions about the future of our food, farming and countryside. It is a once-in-a-generation opportunity to transform the way we eat and farm, and to regenerate our environment and countryside communities.

A wealth of experience and expertise is already being applied to this policy challenge, within government, industry, academia and civil society. We see broad agreement on some principles, for example high environmental and animal welfare standards, and that public money should deliver public benefits. Policy change in different areas must align to enable sustainable and more strategic use of precious land.

Yet there are also competing priorities and different views on how to make the best of our land, not least given the involvement of the devolved administrations in setting their policy. The countryside already faces some stubbornly difficult social, economic and environmental problems. Too many citizens, across diverse rural landscapes and in our cities, feel disconnected from policy questions and the debate can often happen in technical silos. We need to create a new space to have a new conversation, using a systems level view, acting as an honest broker to explore best practice and new thinking.

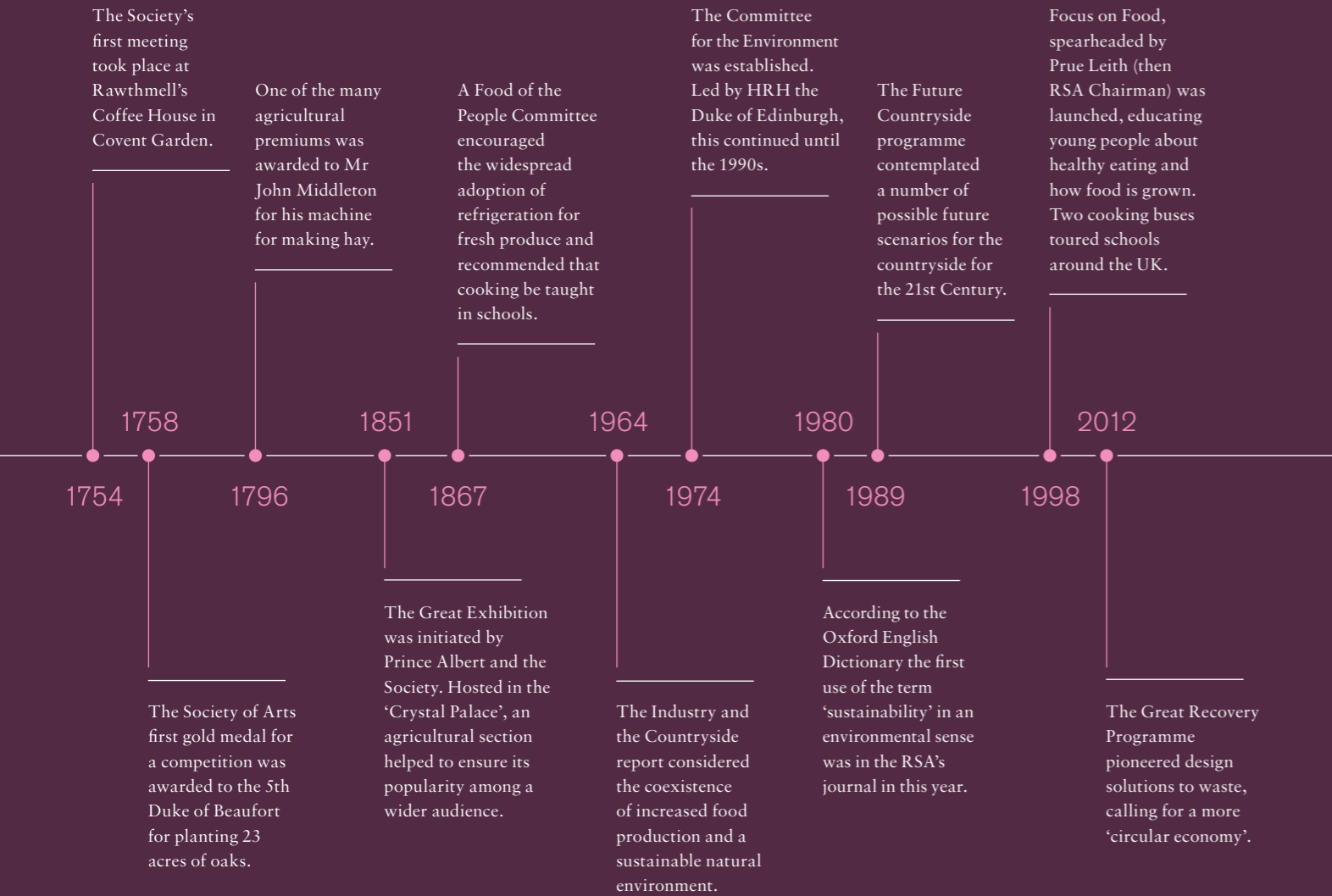
Our role on this Commission, generously funded by Esmée Fairbairn Foundation, is to host this new conversation in order to identify practical and radical solutions, ensuring future policy delivers what the nation needs from food, farming and the countryside.

To identify practical solutions that are fair and sustainable in the long-term, we need to listen to people outside our usual 'echo chamber'. We need to look beyond food, farming and rural policy for ideas, inspiration and innovation. The power to create new solutions is intimately connected to broader issues - like public health, technology, migration and the shape of our future economy.

Policy is important, but it isn't the only driver of change. We must recognise that this isn't about simply changing regulations or government subsidies. The choices made by citizens will shape the future. The work of this Commission will go to the heart of who we are and who we want to be: as individuals, households, and communities.

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The RSA has a long tradition of working on issues related to food, farming and the countryside.



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Introduction

Steering Group

Helen Ghosh
National Trust

Shirley Cramer
Royal Society for Public Health

Helen Browning
Soil Association

Kath Dalmeny
Sustain

George Dunn
Tenant Farmers Association

Andy Richardson
Volac

Sue Davies
Which?

Most importantly, we urgently need to ask ourselves: what kind of country do we want to be and what do we want from our food and farming systems?

Less than a fifth of us live in the countryside. Yet it is central to our lives and who we are as a country. We depend on it for our food, and for much we take for granted, such as clean air and water, beautiful historic landscapes, diverse wildlife, and opportunities for leisure and wellbeing.

In recent decades, the viability of these environmental benefits and the vitality of rural communities has been a serious concern. Addressing these challenges has been both enabled and constrained by our membership of the European Union.

European institutions have set standards in food regulation and environmental protection, the framework for farming subsidies through the Common Agricultural Policy, and the agreements that enable food imports and exports. 500,000 among the 4 million who currently work in the UK food system are EU-born. While today's safer food is a major historical achievement, the growing complexity of the food system makes the assurance of food safety more challenging.

As the UK negotiates changes to international relationships, what direction should domestic policy take us? How can we assure public health and protect natural assets through the disruption? How can government, business and society collaborate to support our diverse farming sector while revitalising rural communities? Most importantly, we urgently need to ask ourselves: what kind of country do we want to be and what do we want from our food and farming systems?

Many different interests meet in this debate. This Commission was started by people from different stakeholder groups, who came together to find common ground. A Steering Group secured funding

from the Esmée Fairbairn Foundation, and engaged the RSA to establish the Commission, provide a secretariat, drawing on its distinctive track record of leading authoritative commissions, high impact research and creative citizen engagement.

In this prospectus, we outline the landscape in which the Commission aims to have influence, sketching some of the shared challenges that span food, farming and the countryside. Food poverty and diet-related illness are on the rise; and while farm incomes rely on public subsidies, the countryside's finite natural resources face pressure to provide economic, social and environmental value far beyond farming.

The first three sections describe change in our food, our farming, and our countryside since we joined the European Economic Community in 1973. Some of these changes have been driven by policy, in agriculture and beyond. Other changes have been in spite of it, or its unintended consequence. The fourth section looks beyond the UK and forward to 2060 – as close to today as 1973 is in our past. The last section outlines how this Commission will operate.



Changing food

The past 40 years have seen startling changes in how we eat, and where our food comes from.

When the UK joined the EU in 1973, McDonald's had yet to arrive. We now eat twice as much food out of the home. Coffee shops have boomed and supermarkets sell more processed and prepared food. Smartphones can request deliveries from major supermarket brands and many of the country's 65,000 takeaways. Today, we spend half the time cooking than we did in 1980.

Although surveys report that we consume fewer calories, diet-related ill health has risen. Diabetes is estimated to have doubled since 2000. The healthcare bill from an overweight and obese population is estimated as £16 billion, more than 10 per cent of UK NHS spending.

Our tentative progress towards 5-a-day, eating 50 per cent more fruit on average than in 1973, depends deeply on EU imports and EU-born workers on UK farms. In 1994 the UK produced 79 per cent of its own vegetables; today this is 55 per cent. Overall, 30 per cent of what we eat comes from the EU, and a further 18 per cent from the rest of the world.

Headline trends towards 'cheaper food' hide important differences in how we eat: across generations and in different communities and households. As a proportion of household income, the poorest spend twice as much on food at home as the richest, and an estimated 8.4 million British people are food insecure.

Meanwhile, of 42 million tons of food purchased, 10 million tonnes is wasted. Food and drink is the UK's largest manufacturing sector, measured by both economic output and employment. In total, the food system – from farmers and supermarket managers to catering staff – employs 1 in 8 of the UK workforce.

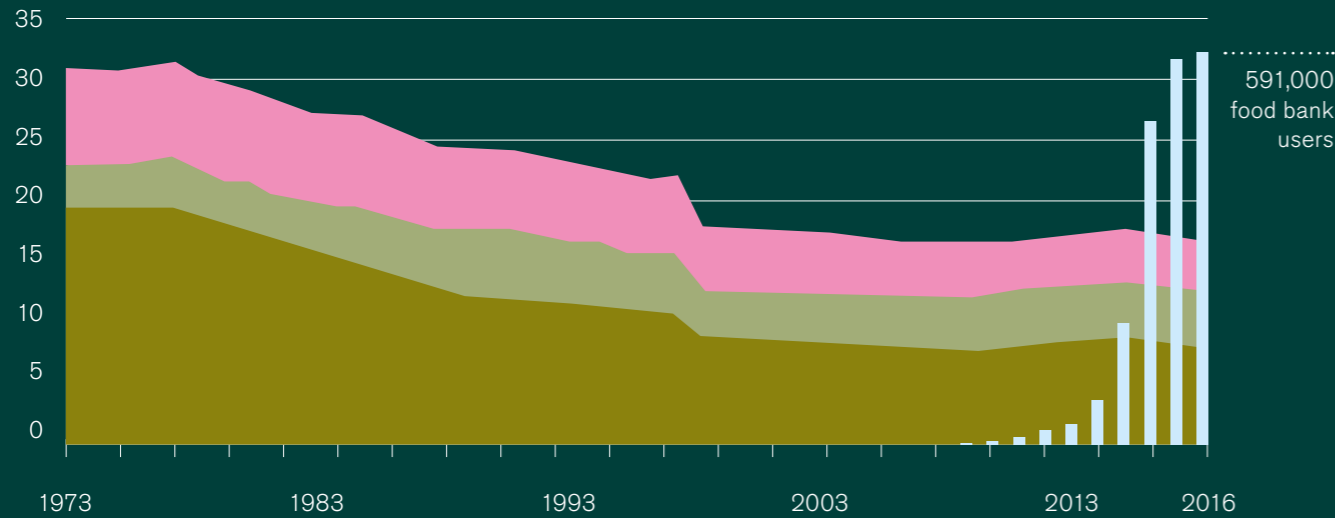
The economic structure of the food system continues to evolve. In 1973, independent grocers accounted for 30 per cent of sales, compared with 2 per cent in 2017. In the last two decades, job numbers have declined 15 per cent in food manufacturing, while rising 40 per cent in catering, cafes, pubs and restaurants. Part-time work and temporary contracts have become more common, and EU-born staff fill almost a third of food manufacturing jobs.

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Food has become an ever smaller part of household budgets, but it is still a big expense for poorer households. Food poverty, reflected most starkly in the rise of food banks, is on the rise.

Total household expenditure on food and drink per week



- Alcoholic drinks
- Food eaten out
- Household food
- Food bank

Taking into account household size, the lowest income households spend 25 per cent of income on food and drink, while the highest income spend 16 per cent.

Food bank usage has risen, with 591,000 people accessing food banks in 2016.

▨ All other expenditure

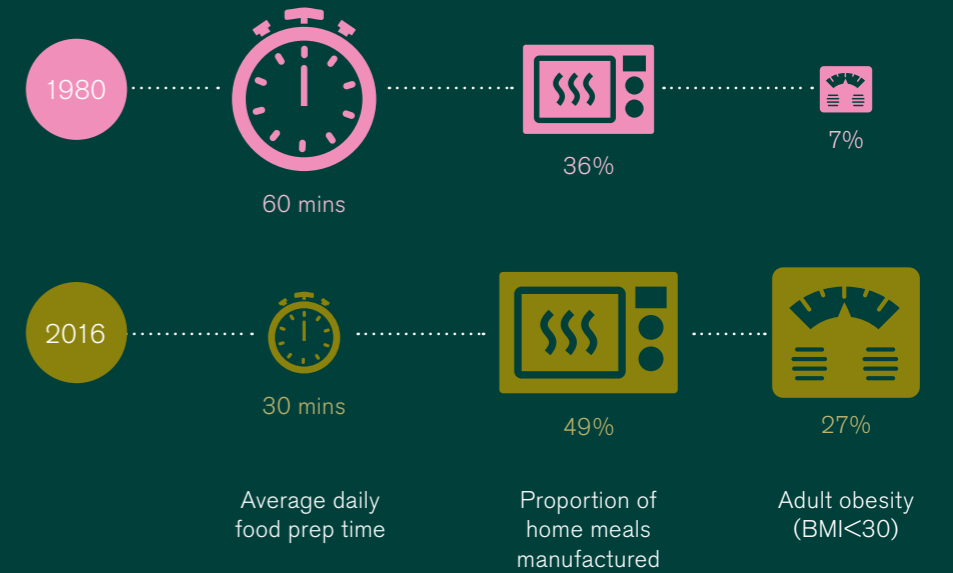
● Food, drink, eating out

Total household expenditure on food and drink (£ p/week)



One of the big shifts has been towards convenience, with people spending less time cooking and eating more processed foods.

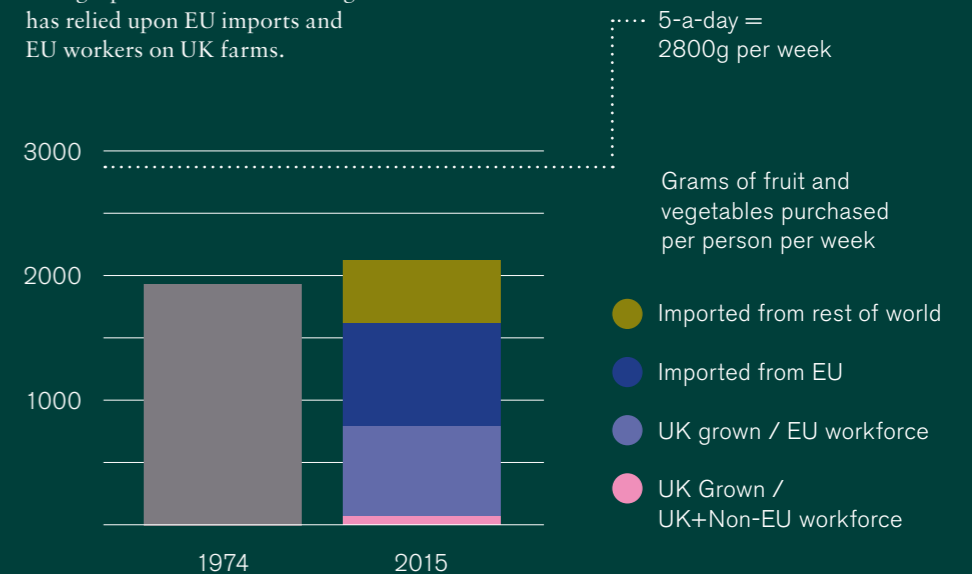
Over the same period, diet-related health has deteriorated and obesity has risen.



In total, the food system – from farmers and supermarket managers to catering staff – employs 1 in 8 of the UK workforce.



Our tentative progress towards eating 5 portions of fruit and veg has relied upon EU imports and EU workers on UK farms.





Changing farming

Agriculture accounts for 12 per cent of jobs in the UK's food system. But in covering 71 per cent of the UK's land, it is the main influence on our landscape, soils, wildlife and fresh water.

Over the long-term, farms have become larger and more specialised. The UK has lost 12 per cent of its farms in the last 10 years. Young farm holders are increasingly rare: 13 per cent are under 45, compared to 23 per cent in 2000. Barriers to starting a new farm business are high, which contributes to consolidation of farmland ownership. Although there are economies of scale in large farms, small farms can be as productive as big ones.

While farms have invested in increasingly specialist methods and equipment for cropping or animal husbandry, their businesses have diversified. Leisure and accommodation, environmental management and renewable energy production have grown. Diversified activity accounts for over a fifth of farm business income, and more than a third on small farms.

The value of farm output per hectare has risen in the last decade, after remaining flat in the previous decade. This has been achieved by additional inputs, such as animal feed and seeds, while slowing the long-term decline of labour, energy and fertiliser inputs. Yields in some priority crops, notably wheat, have plateaued, despite the UK's public investment of £300m annually in agricultural research and innovation.

The influence of the EU has been fundamental to UK farming. Not least, 17 per cent of the agricultural workforce is EU-born. Reforms to EU policy have shifted the crops grown, the methods used and whether land is in production at all. Of the £3.6bn income made by UK farm businesses in 2016, £3.1bn was derived from EU farm payments.

Public money has comprised at least half of UK farm income in each year since 2005, but fluctuating market prices and exchange rates undermine financial security. Although EU payments have aimed to achieve environmental benefits, wildlife, environmental quality and ecosystem services have not significantly recovered from major declines through the 20th Century.

Public attitudes to farming are nonetheless positive, if complex. People overestimate farmer earnings at almost twice the national average, whereas in fact they are lower. 89 per cent of the public say it is important to support British farmers, but only 38 per cent say they check to see where food is produced when buying.

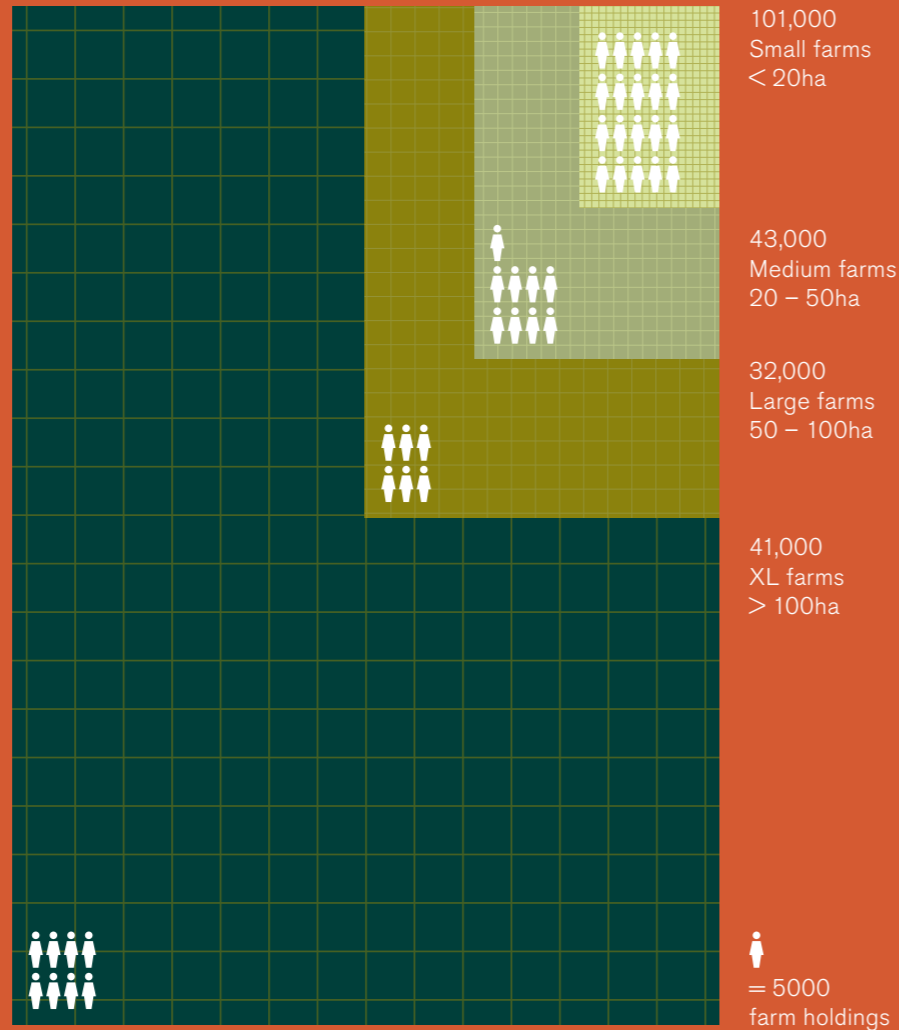
Diversified activity accounts for over a fifth of farm business income, and more than a third on small farms.



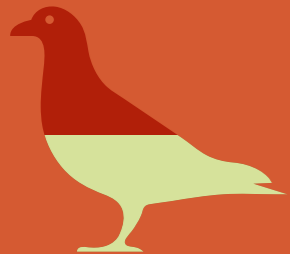
Fewer, bigger farms account for the majority of farmland and food production, but farms at all scales can be productive and profitable.

The smallest farms average 7ha and represent 46 per cent of holdings; 4 per cent of the land in farm holdings.

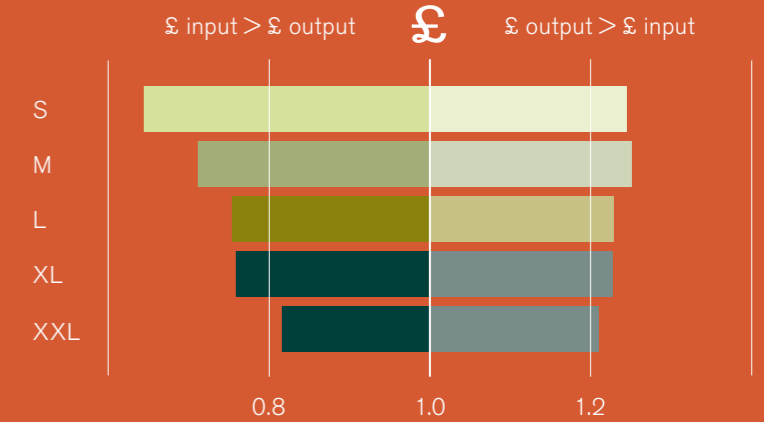
The largest farms average 314ha each and represent 19 per cent of holdings; 74 per cent of the land in farm holdings.



The number of farmland birds has declined 51% since 1973.



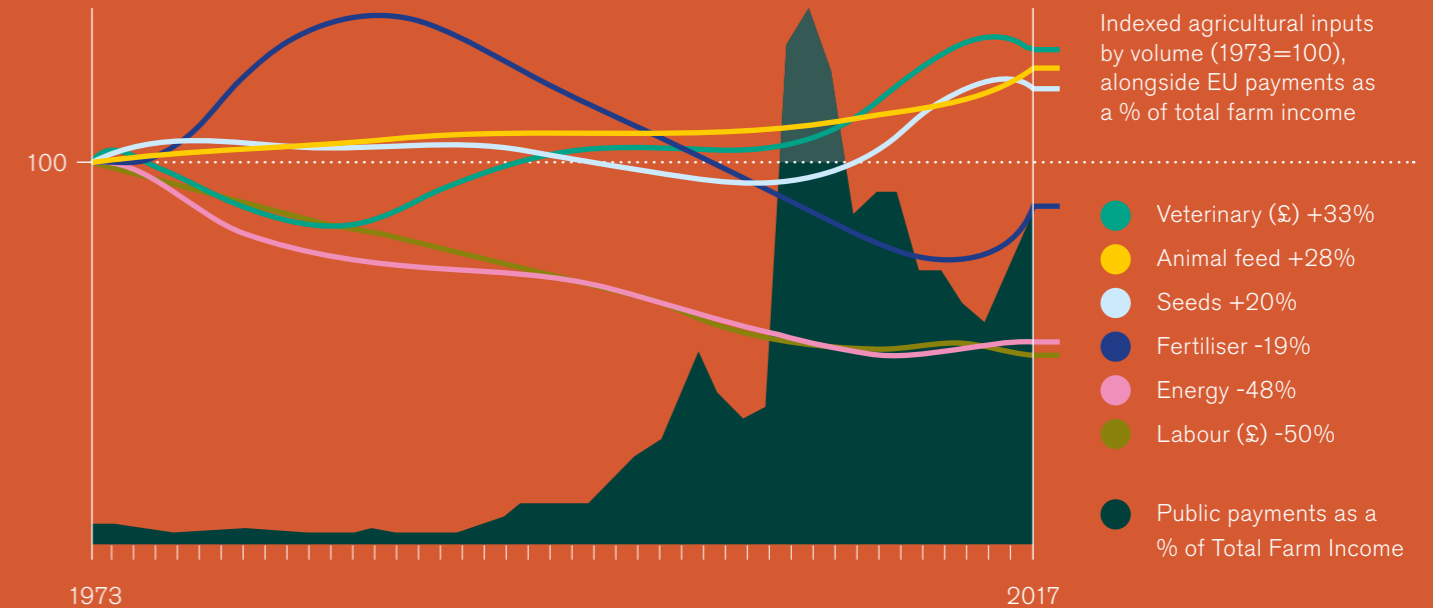
Productivity ratio (£ input : £ output) of highest performing farms (right) and lowest performing farms (left) by farm size (England; 2015/16)



Comparing the value of outputs and the cost of inputs at current prices, the best performing small farms are more productive, £ for £, than the best performing large farms. However, the largest farms are on average the most productive.

Since we joined the EU in 1973, public payments as a proportion of total farm income has become hugely important, but key indicators of ecosystem decline have not recovered.

In this era, farms have used steadily less energy and labour, but more seed and animal feed. Fertiliser use has fluctuated. The volume of pesticides used - not shown below - is up 491%.





Changing countryside

The towns and cities that are home to over 80 per cent of the UK population are built on 10 per cent of our land. The rest is countryside. While farms and woodland cover most of it, they are now a smaller part of the rural economy.

Agriculture, fishing and forestry account for three per cent of rural economic activity and eight per cent of rural employment – roughly half the proportion than in 1973.

The countryside looms large in our national identities at home and around the world. The countryside and rural scenery is the number one attribute that people in England say makes them proud of their country. Scotland's strong exports have gone hand in hand with its international brand as 'land of food and drink'.

Yet the quality of this rural environment is under huge pressure. The past 40 years have seen farmland bird numbers halve and butterflies fall by 40 per cent. To conserve important habitats, more than a quarter of UK land is protected by national and international legislation. Nevertheless, 1,057 species in the UK are estimated to be threatened with extinction. The case for protecting and restoring ecosystems acknowledges the essential services these provide to us all, not only in the countryside but in cities.

In addition to growing food, fuel and livestock, these include providing clean water, flood protection, insects pollinating crops, and removing greenhouse gases from the air.

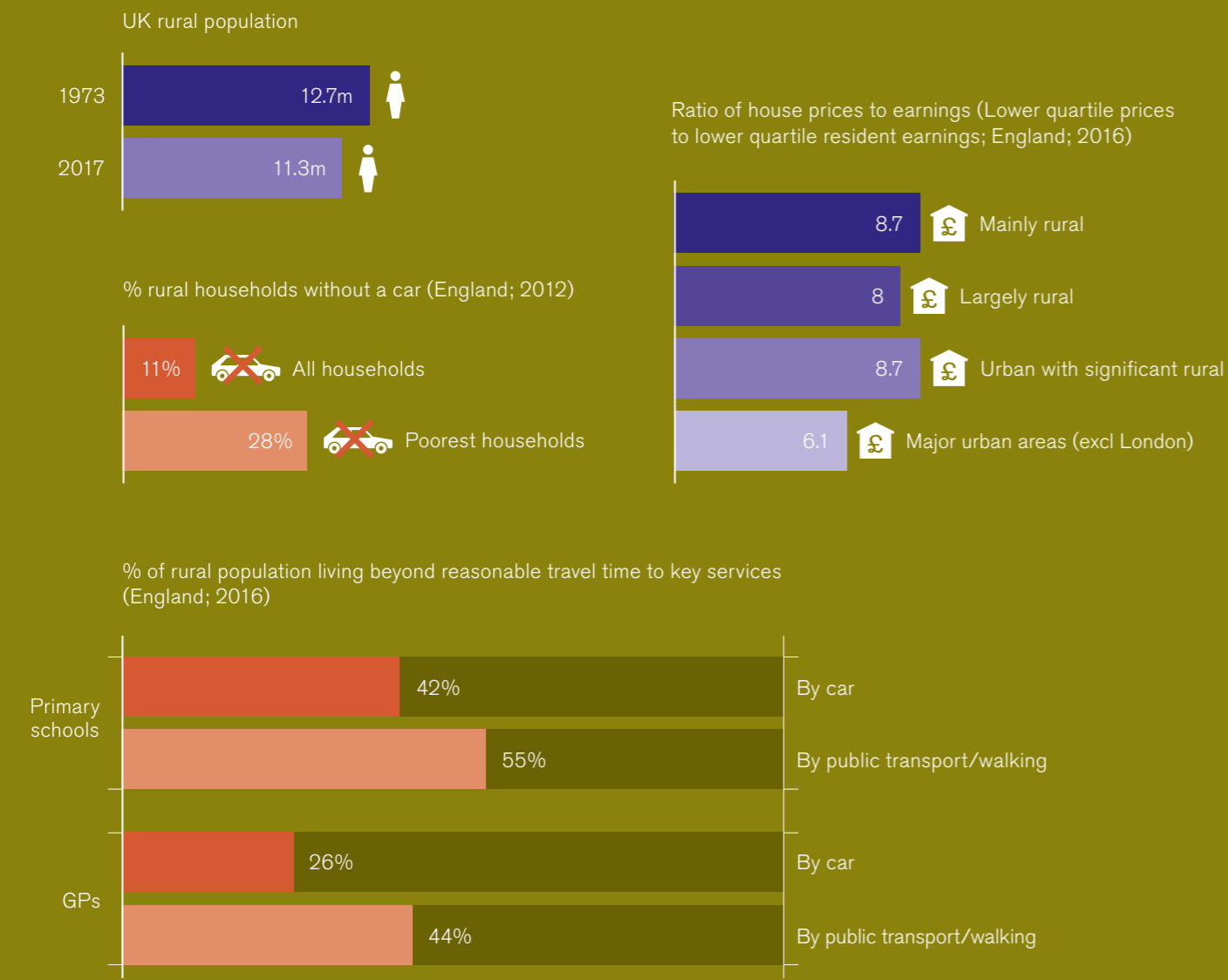
Wildlife and scenic beauty have an economic value, because leisure and tourism depend on them. In some cases, this recreational value of land is greater than its 'primary' value producing timber or food. The economics are only part of the picture; for many people, nature has intrinsic value beyond what it provides for us.

Alongside environmental degradation, rural communities face pronounced social challenges. Delivering health care, education and other public services at a comparable cost and quality to urban settings is difficult. Average earnings are lower for rural jobs, yet housing is on average less affordable than urban areas outside London. Ongoing challenges include ensuring that improving digital connectivity benefits businesses and quality of life in rural communities, building resilience to climate change, which will increasingly shape the rural environment, and ensuring ecosystems flourish for future generations.

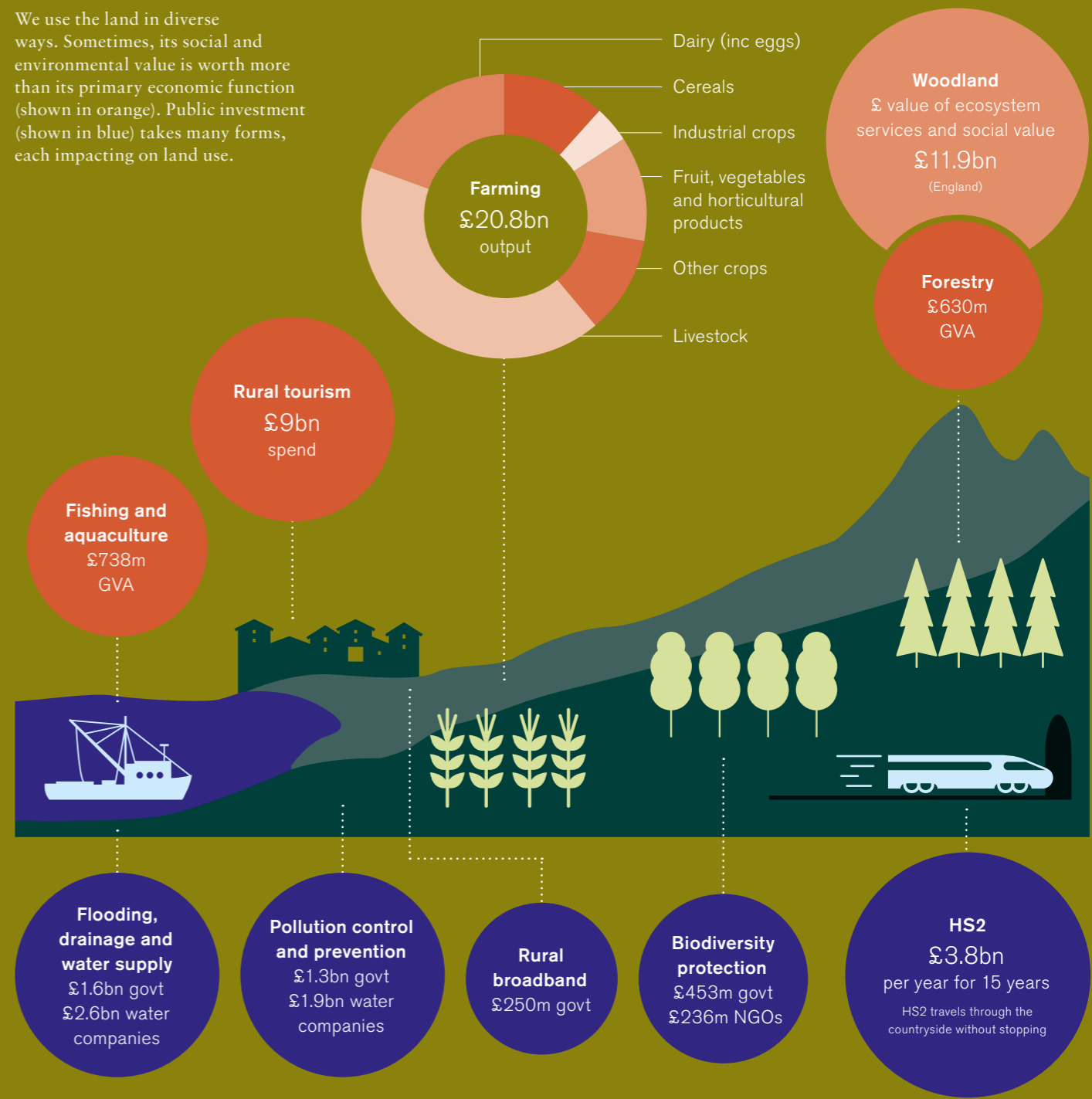
To conserve important habitats, more than a quarter of UK land is protected by national and international legislation. Nevertheless, 1,057 species in the UK are estimated to be threatened with extinction.



The challenges to maintain and enhance living standards in the countryside include housing affordability, public transport and managing public services for a changing population.



We use the land in diverse ways. Sometimes, its social and environmental value is worth more than its primary economic function (shown in orange). Public investment (shown in blue) takes many forms, each impacting on land use.





Changing world

Addressing the future challenges for food, farming and the UK countryside requires an approach which recognises the shared opportunities and mutual benefits.

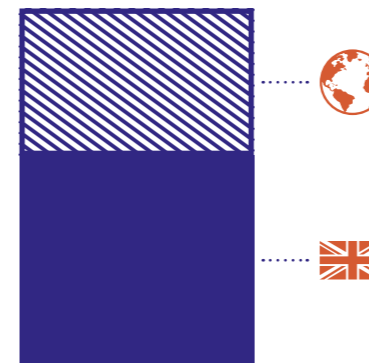
How could systemic investment in ecosystem services boost the rural economy, and relieve the cost and income pressures on farmers? How could initiatives within local communities or river catchments provide more affordable housing or better flood protection? How can land use practices combine farming and forestry, or recreation and carbon sequestration in the same field?

Limitations are also evident. While our fruit and veg consumption is vulnerable to leaving the Single Market, farming and trade policy is only one tool to address public health concerns. The interdependencies with other areas of public policy extend to labour markets, migration, international trade and development, infrastructure, transport and climate change.

Globally, farming practices are not only threatening our planetary support systems, food security is also affected by their failure. Farming accounts for 30 per cent of total greenhouse gas emissions and 70 per cent of fresh water use. Almost a third of the world's arable soils have been lost to erosion and pollution over the last 40 years. Half of antibiotics are used on animals and, amid the crisis of antibiotic resistance facing human medicine, efforts are mounting to cut their routine use.

The four nations of the UK have different rural environments, and different national priorities for social and economic development over coming decades. The health of our communities, farming and environment rely on each other. We need balanced solutions that serve them all, not trade one off against another.

For every 100 hectares of UK farmland, another 70 hectares globally is devoted to meeting UK consumption.



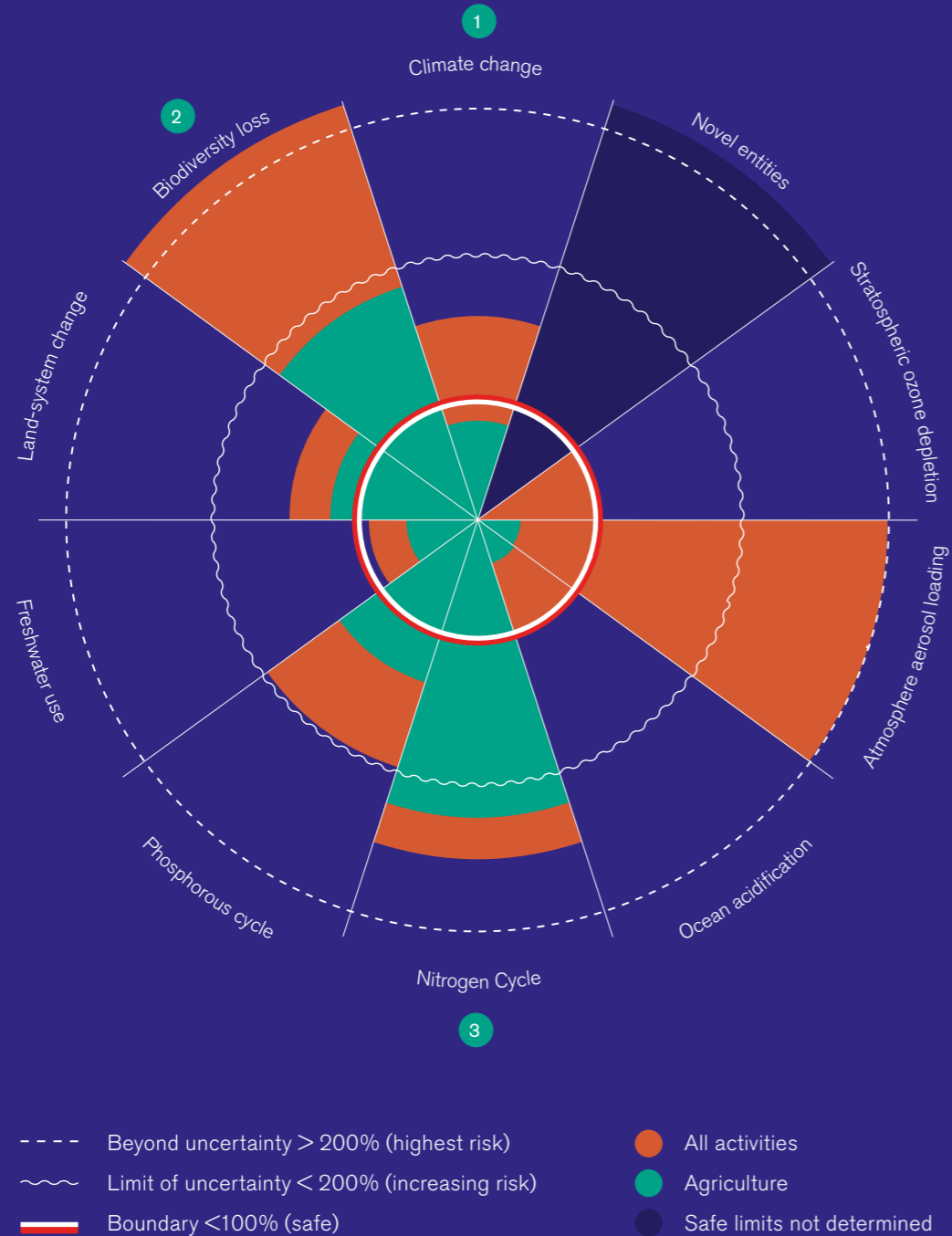
The policy context for the Commission must be broad, and extends globally. On climate change, for example, we need to consider how cutting greenhouse gas emissions at home affects the consumption footprint of our food imports. Not only are reductions in UK agricultural emissions lagging behind other industries; our demand for food and energy has led us to 'offshore' our impacts. For every 100 hectares of UK farmland, another 70 hectares globally is devoted to meeting UK consumption.

Human impact on the planet's natural systems

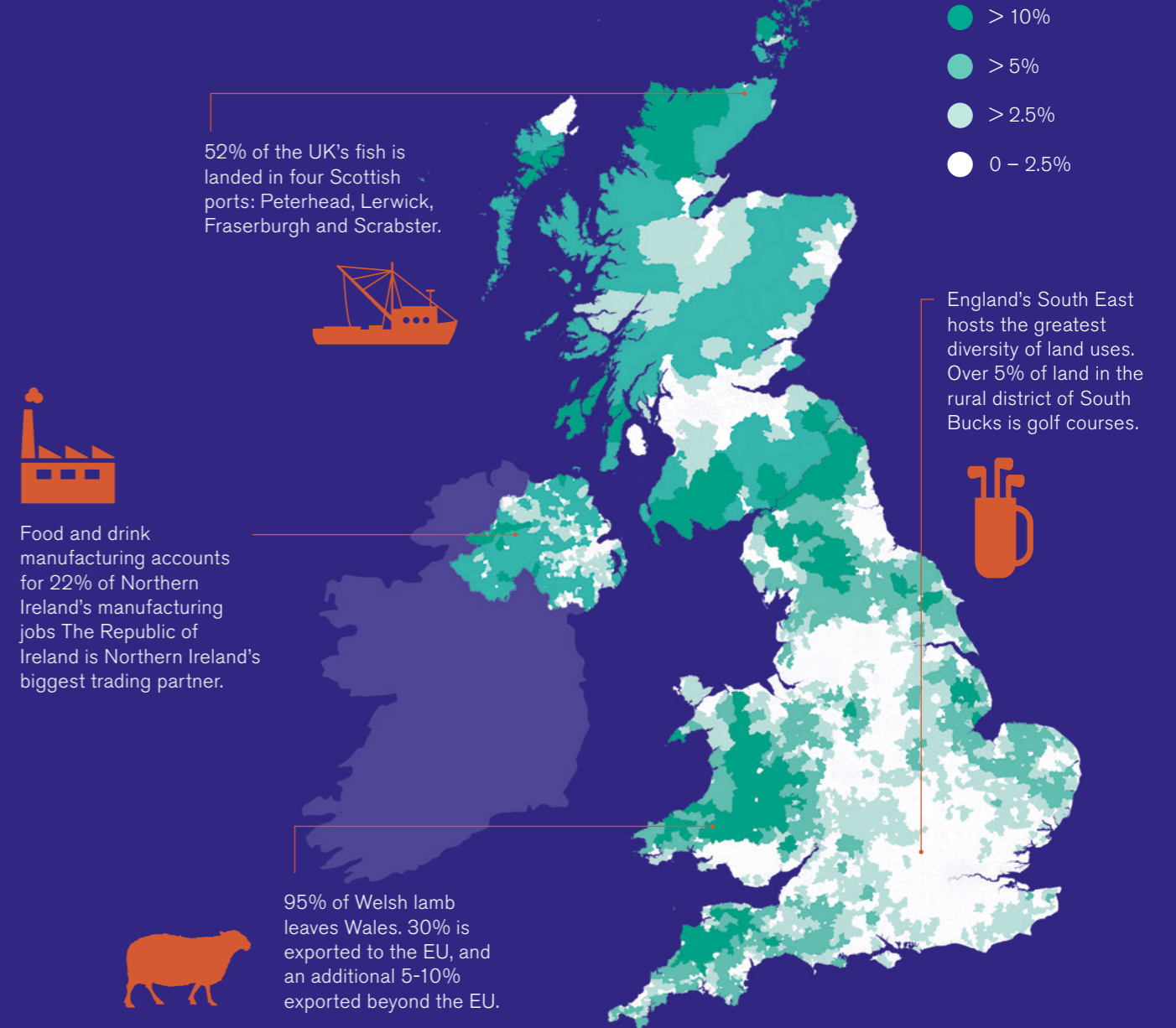
1 Climate Change
The Climate Change Act 2008 commits UK government to reduce net greenhouse gas emissions 80% by 2050 (compared to 1990 levels). Subsequently, the Paris Agreement sets a stronger ambition for emissions reductions.

2 Sustainable Development Goal 15
To protect, restore and promote the sustainable use of ecosystems, stopping land degradation by 2030 and halting biodiversity loss in the longer term.

3 Nitrate Vulnerable Zones
58% of England's land is covered by laws limiting nitrogen use on farmland – typically fertiliser and manure. Current proposals in Wales would triple the extent of NVZs, and recent changes have expanded NVZs in Scotland.



Within the UK, England, Scotland, Wales and Northern Ireland face different but connected versions of the same challenges in food, farming and the countryside.



What we will do

The Commission's task, agreed with our funders, is three-fold. We will:

1. Inspire and develop a widely-shared mandate for change.
2. Set out a vision that is fairer, can stand the test of time, and aligns more closely with public expectations and values.
3. Propose solutions to achieve that vision, identifying where communities and business can take a lead, and where national policy is essential.

These are no small tasks – and we will build on the wealth of experience and activity that is already being applied to them.

Food, farming and the countryside make up a deeply connected and interdependent system in which we all have a stake. We will draw on the RSA's record of combining cutting edge research and critical enquiry, with rigorous and creative citizen and community engagement.

People with different perspectives will be able to work together to find common ground and innovative solutions, including those not typically heard from in these discussions.

We will publish our interim report in Autumn 2018 and our final report in Spring 2019, sharing our findings over the following six months.

There are seven strands of work intertwined through the programme. The Commission will:



Take evidence in a series of meetings around the country, hearing from recognised experts and from people with experience of the issues where they live.



Involve citizens and communities through innovative face to face and digital engagement, growing public awareness of these critical issues and inspiring changes in choices and behaviours.



Work closely with three regions, the North West, the South West and the East of England, in deep 'action and research projects' to explore practical policy proposals, test their impacts, illuminate and amplify innovative practices, and leave a long term legacy.



Convene inquiries in Wales, Scotland and Northern Ireland, recognising their unique circumstances.



Coordinate targeted research from academic partners



Draw on the RSA's 29,000 Fellows to extend opportunities for public involvement.



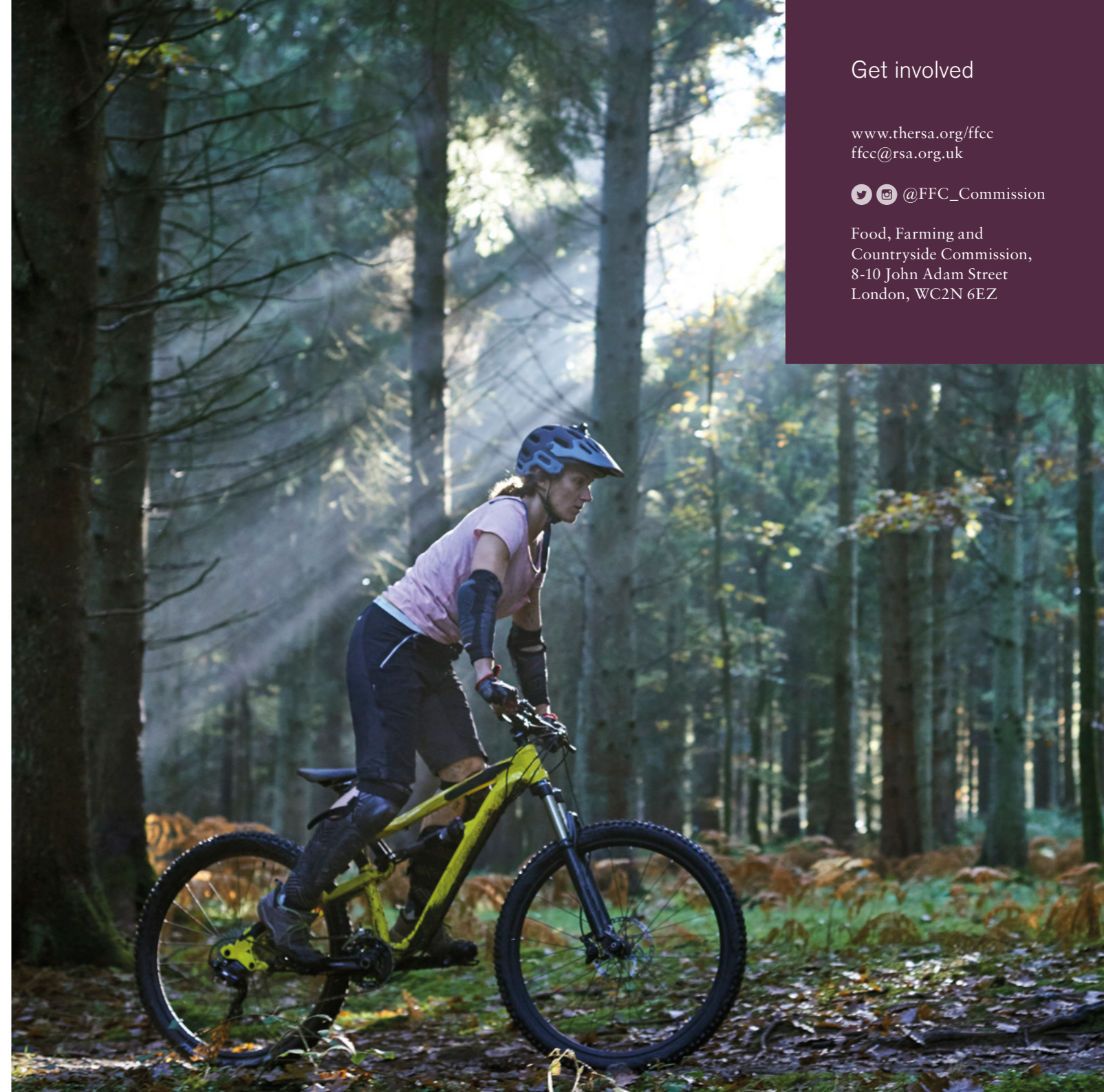
Share and review emerging findings with stakeholders, to test and develop the policy proposals as they become clearer.

Get involved

www.thersa.org/ffcc
ffcc@rsa.org.uk

  @FFC_Commission

Food, Farming and
Countryside Commission,
8-10 John Adam Street
London, WC2N 6EZ



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8-10 John Adam Street
London, WC2N 6EZ
+44 (0)207 930 5115

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