Food security - UK priorities, supporting domestic production and driving innovation
21\textsuperscript{st} September 2017

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About this Publication

This publication reflects proceedings at the Westminster Food & Nutrition Forum Keynote Seminar: Food security - UK priorities, supporting domestic production and driving innovation held on 21st September 2017. The views expressed in the articles are those of the named authors, not those of the Forum or the sponsors, apart from their own articles.

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Westminster Food & Nutrition Forum Keynote Seminar:
Food security - UK priorities, supporting domestic production and driving innovation

Timing: Morning, Thursday, 21 September 2017
Venue: The Caledonian Club, 9 Halkin Street, London SW1X 7DR

8.30 - 9.00 Registration and coffee

9.00 - 9.05 Session Chair’s opening remarks
Phil Bicknell, Market Intelligence Director, AHDB

9.05 - 9.20 Food security - the global context
Professor Charles Godfray, Hope Professor and Director, Oxford Martin Programme on the Future of Food, University of Oxford

9.20 - 10.00 The impact of Brexit - trade, standards and meeting global commitments
What should be the priorities for trade policy during and post-Brexit to support growth in the UK agri-food economy and provide consumers with access to quality and affordable produce from the international market? With regard to trading relationships with EU member states and in light of a reported UK agri-food trade gap of €35 billion in 2016, how will current commercial strategies need to adapt and where are the greatest trade opportunities internationally? What options may be available to Government to mitigate the potential impact of Brexit on the cost and availability of imported food products, particularly for lower-income families? What should be the UK’s future contribution to international food security as part of wider international development objectives?
Sian Edmunds, Partner, Burges Salmon
Pawel Swidlicki, Brexit Analyst, Edelman
Questions and comments from the floor with Professor Charles Godfray, Hope Professor and Director, Oxford Martin Programme on the Future of Food, University of Oxford

10.00 - 11.00 Supporting domestic food production and manufacturing - funding, ‘Green Brexit’ and sector priorities
With the Secretary of State setting out plans for a greater focus on environmental protection as part of a ‘Green Brexit’ - what more can be done to support domestic food protection, safeguard the environment and prepare industry for any changes to funding mechanisms in the future? What should the priorities be for policymakers in safeguarding sustainability and safety in food production in the face of pressures of negotiating new trade agreements, increasing growth and repositioning the UK food and drink brand? What are the most promising opportunities for the UK outside of the EU to review regulations governing food and the environment, in seeking new markets and increasing productivity levels?
Jayne Brookman, Head of Agrifood, Knowledge Transfer Network
Dr Helen Ferrier, Acting Head of Policy Services, NFU
Lucy Bjorck, Senior Policy Adviser, RSPB
Helen Munday, Chief Scientific Officer, Food and Drink Federation
Questions and comments from the floor

11.00 - 11.05 Session Chair’s closing remarks
Phil Bicknell, Market Intelligence Director, AHDB

11.05 - 11.30 Coffee

11.30 - 11.35 Session Chair’s opening remarks
Sian Edmunds, Partner, Burges Salmon

11.35 - 12.55 The way forward for UK agri-food policy - innovation, regulation and supporting sector growth
With Brexit offering an opportunity to review existing regulations on novel foods and processes, how well positioned is the UK to respond to any changes and drive innovation in agricultural processes and support food security? What issues might such changes raise for regulation, consumers and environmental protection, and how UK produce is seen internationally? With the security of EU funding only guaranteed for existing agri-food research projects, how should the UK Government approach funding support after the UK leaves the EU? How can the UK maintain its world-leading position in agri-food science and how might sector businesses, research institutions, technology providers and others need to develop their collaborative approach going forward? How can knowledge transfer be improved to advance the speed of implementing innovation? What opportunities does the UK now have in terms of improving evidence-based policy making for food production?
Phil Bicknell, Market Intelligence Director, AHDB
Allan Wilkinson, Head of Agrifoods, HSBC
Dr Yuelai Lu, Head of Secretariat, UK-China Sustainable Agriculture Innovation Network and Research Fellow, University of East Anglia
Rt Hon Sir Lockwood Smith, former New Zealand High Commissioner to the United Kingdom
Professor Gerry Boyle, Director, Teagasc
Mark Buckingham, Corporate Affairs Lead UK and Ireland, Monsanto
Questions and comments from the floor

12.55 - 13.00 Session Chair’s and Westminster Food & Nutrition Forum closing remarks
Sian Edmunds, Partner, Burges Salmon
Matthew Bradberry, Forum Lead, Westminster Food & Nutrition Forum
Westminster Food & Nutrition Forum opening remarks
Matthew Bradberry, Forum Lead, Westminster Food & Nutrition Forum

Good morning. Good morning everyone. Good morning.

I’m Matthew Bradberry, Forum Lead of the Westminster Food & Nutrition Forum and it’s a pleasure to welcome you all to today’s seminar.

Just a quick couple of housekeeping points from me before we get started. We are still waiting for quite a few late delegates to trickle in, so please do make room for them as arrive in your aisles.

There will be a number of opportunities throughout the day for questions and comments to be taken from the floor. If you would like to ask a question during one of these sessions we would ask that you catch the attention of our Chair by raising your hand, and if you could start by giving your name and organisation for the purposes of our transcript we would be very grateful.

We are tweeting today’s event as #WFNFEvents. There is wi-fi available here, details of which are on the slides.

If I could just ask everyone to turn their phones to silent to avoid disrupting proceedings, I will now pass you over to the Chair for our first session, Phil Bicknell.

Thank you.
Session Chair’s opening remarks
Phil Bicknell, Market Intelligence Director, AHDB

Thanks Matthew. Good morning.

I’m Phil Bicknell, I’m the Market Intelligence Director at the Agriculture and Horticulture Development Board. And today’s seminar on food security touches on so many themes and that was when you look through the agenda and the great list of speakers and topics that we are going to be hearing from today. Whether it’s the productivity challenge the agri-food sector faces, whether it’s the policy environment and that’s whether it’s from a trade perspective or from an agricultural and farm perspective, or whether it’s the regulatory framework that we all operate in, there’s some massive and important themes that we are going to be touching on today and I think probably each in their own right probably deserves a seminar, and that’s before you look at these issues in the context of Brexit.

Now we’re stating the obvious to say that Brexit is complex. At AHDB we’ve written tens of thousands of words about Brexit over the last year which have been published as part of our Horizon series, analysing some of the big issues that we think the agricultural industry faces.

And just for clarity, as a non-departmental public body, we are not pushing for certain policy measures, instead what we are trying to do is to help the industry to understand the challenges. Just be aware of the potential that Brexit does give us as a sector, but also be conscious of and mindful of, and aware of the pitfalls that could go along with it.

And what we found, as we dig into the big policy areas, that even the things that are most straightforward on the surface, when you start digging a little deeper they can prove to be pretty complicated when you’re immersed in the detail.

Now I’m looking forward to learning out from our speakers today a lot more about the detail behind some of the big issues.

That’s enough from me, just as opening words, I will introduce Charles Godfray. Charles is going to focus on food security from a global context. Last time I sat down with Charles would have been as part of a Defra working group looking at food security as part of a Government initiative several years ago. I recall lots of different conversations in the room and lots of different viewpoints Charles, so I am sure that will trigger quite a bit of discussion as well in the Q&A later on, but Charles I will hand over to you, the floor is yours.
Food security - the global context
Professor Charles Godfray, Hope Professor and Director, Oxford Martin Programme on the Future of Food, University of Oxford

Thanks very much Phil, it’s a great pleasure to be here and looking at the wealth of expertise and farming and the food system, I have to say that, as a benighted academic I feel rather nervous.

What I am going to do today is I am going to explore four questions, really relatively briefly, to try and hopefully frame some of the discussions that we will have for the rest of the day, and I’ve veered a little bit from thinking about food security solely in a global context to thinking about both the context in the UK and more broadly how it’s affected by what’s happening in the world. And I guess that a theme that will run through all my comments is I’m a natural scientist, my background is a biologist interested in pest management, but the more I get involved in food policy and the dynamics of the food system, the more I realise, and this is probably something that is very familiar to everyone in the room, just how important different narratives are in the way that policy happens and in the way that political decisions are made.

So the first question I want to ask is what do we actually mean by food security in both the global and in a UK context, and I guess here that where we talk about food security in the UK in forums such as this then there are two sort of different narratives that one might have, and these narratives have a sort of long history going back, I think all the way to the Second World War when the farming community essentially saved the country by providing food in the war time situation, and so there’s that one narrative on food security that still continues which might be called the existential narrative, how do we arrange our food system and our farming world such that we can provide the food for our population?

And then I think the second narrative places food security within a broader global context and that looks into the future. I was involved 5 or 6 years ago in the Foresight Programme on the Future of Food and Farming set up by the Government Office of Science, and that was concerned with food security, but it was concerned with global food security and it was asking what is the role of the UK in global food security, both how it is affected by food security and by contributing to food security globally.

Now I would argue that the existential food security narrative is really not relevant for today. It is true that one can conceive of political situations such that the UK would have to produce the far greater fraction of its food internally than it does today, so reduce food exports, but that would be almost going on to a war footing, and I think that the arguments that one has to prepare UK agriculture now to meet that eventuality is not really cogent because one would say well if on really cared about existential food security then one would need to spend the same amount of time caring about fertilisers and seed than one does about agriculture itself.

But I think there is a really strong food security argument, and this is the second narrative, how does the UK address what will, not for certain but is likely to happen, is that we are going to see an increasing pressure on food supplies as demand grows up from an increasing global population, and increasing richer global population, at a time when competition for land, water and climate change is going to affect our capacity to produce food, and there I think the interesting question is what is the role of the UK in that, and of course with that type of food security one will get food price signals saying that this is coming, and the workings of the agricultural market, to a certain extent, will automatically address this as food prices go up an efficient market sector will then produce more food.

And then I think the interesting policy questions are where are the market failures in that, and to me what we should be looking for is an agricultural system that can respond efficiently to price signals, and responds efficiently in two ways, one economically efficiently and the second environmentally efficiently, so that the way we respond to signals to produce more food doesn’t undermine our capacity to produce food in the future. And so I think from a policy point of view, it’s the market failures there, our capacity to respond
economically, our human capacity, our research capacity, and then secondly on the environmental side where many of the externalities, almost by definition, can result in market failures.

And of course this argument does countenance that one of the responses to food security will be increases in food prices, and in the UK where we spend 9% of our income on food, probably at no time since money was invented, has society such as ours and the rich will spend less on food, there’s still a large capacity to produce more in food and are there arguments that we undervalue food because it is too cheap, but then that doesn’t take in account of the tenth decile, the poorest decile in the UK where the capacity to buy food is still an issue. And this then goes into all the topics that we won’t have time to talk to today about inequality and safety nets.

So the second question I just wanted to explore briefly is what might the shape of the UK rural support be after CAP, and for the sake of argument I’m going to assume that Brexit goes ahead, and I’m going to assume that what happens post Brexit will be a settlement that gives us the capacity to reshape the CAP.

And again I think at the moment there are at least three narratives about what might happen, well there might be a fourth narrative, that the fourth narrative is the approximately £3 billion that we spend in the rural economy today through CAP just gets absorbed back into Treasury and goes into the NHS, and the dialogue we have seen over the last week or so about the vast amounts of money that leaving the EU will release is concerning, I think, for anyone who cares about both the environment and about the UK agricultural sector.

But putting that on one side then I think one narrative is that we will reinvent something that is like the CAP and that we will still have single farm payments, or something similar that direct transfers of resources to the farming community, and by this I mean at equilibrium, and it’s clear that there will be a transitional period, but I’m now looking ahead 4 or 5 years.

I think that there is another narrative which many of my colleagues in the environment, academic interests in the environment hold to, is that there is going to be a gigantic source of money that can be redeployed for explicitly environmental goals, and they talk very much along the mantra of public money for public goods, and then they define public goods quite narrowly as purely these environmental outcomes.

And then I think there’s a third narrative, which is almost a sort of third way between this, which actually maintains the narrative of public money for public good, but then asks what actually is the public good, and I worry that some of the conversation about what public good has taken a rather narrow economic focus where that economic focus may be traditional economics or it might be modern environmental economics around natural capital, and that sort of ignores what I think is the important political economy question of what do we actually want from our countryside, from our rural world, what exactly is the public goods that we want from our rural economies, and I think that will certainly be environmental benefits, but I think it will be more complex than that, I think it will involve landscapes, I think it will be preservation of aspects of the rural communities in which the farming community is absolutely essential.

And I see some enormous opportunities if we get this argument right. One the great opportunities I see that we have is the possibility for far greater granularity in our rural policies, it surely makes no sense to have a single one size fits all policy that currently has to work from the Peloponnese to Finland, to the West of Ireland, so we have the opportunities to do something far more granular that can benefit both the environment and food production and the industry.

But I do see that there is a real challenge here at the moment that we have these conflicting narratives and that it is going to be harder for politicians to choose between us, and I see it almost as a once in a generation opportunity to try and forge a new narrative between the agricultural industry, between people who care about the environment from all sorts of different perspectives, and for me the way to draw that narrative is through this political economy discussion of what we actually mean by public good, and I think that will be a hard and very contested argument, but if we can almost agree the ground rules, then there is a possibility that the consortium of people who care about the countryside, from farmers to environmentalists and everyone in
between, might be able to come up with a concerted plan that in the complexities that Brexit is going to throw up, that Ministers might just grab because it’s easy.

So I am running out of time as always, so I’m going to talk about the last two relatively briefly.

The first is the issue of productivity, so we know that UK productivity lags behind European productivity and we know that productivity in the ag sector is disproportionately bad on that.

Now of course when one measures productivity it really does depend what the denominator is, and some of the low productivity is because we are maintaining environmental goods and because we are maintaining employment in the countryside. So I think we need a more sophisticated way of looking at what we actually mean by productivity and having better measures that take into account some of these public goods, both natural capital and the social capital as well.

But one point I would make about productivity, and this is coming from the academic sector, I think the UK academic sector is absolutely fabulous about some of the research that we do that is relevant to farming, especially the more high tech end, I mean you can put John Innes up against any institution in the world, and it’s just wonderful. I think we have been traditionally much badder as the sort of more agronomy, the soil science, I’m an entomologist so I’d have to say entomology. I’m at Oxford, I spent most of my career at Imperial College, but I was an undergraduate at Oxford at when there was a Department of Agriculture, Soil Science, Forestry and Agricultural Economics, we’ve lost all that. And so I think to a certain extent we’ve failed, in my sector, the UK agricultural industry, but the excuse was during the Maggie Thatcher periods when we had wine lakes and grain mountains, it was pretty difficult.

And the final point I was going to make is on regulating technology and I think there is a capacity that we might be able to do that better when we are able to control things more within the UK, and again I think we are stuck with the two narratives here, the narratives about farming, which are the heroic profession that feeds the country, and that farmers are the despoilers of the countryside. So we have this sort of bipolar narrative here and I guess what I rather hope is that as we try and have a new narrative about what we want from our countryside, both the vibrant farming industry and an environmental friendly way of running out landscapes, then we might be able to break this narrative which, to my mind, undermines and politicises our capacity to regulate technology.

Thanks very much Phil.

Charles Godfray’s PowerPoint presentation can be downloaded from the following link:  
http://www.westminsterforumprojects.co.uk foraums/slides/Charles_Godfray.pdf

Phil Bicknell: Thank you Charles, a great scene setter to kick off with. We are going to move on and next up we are going to hear from Sian Edmunds. Sian heads up Burges Salmon’s food and drink team and she is going to just expand a little bit more in terms of some of the trade standards and issues that we face in terms of global future and requirements. Over to you Sian.
The impact of Brexit - trade, standards and meeting global commitments
Sian Edmunds, Partner, Burges Salmon

Thank you very much.

I’m a partner in a law firm, Burges Salmon. I head up our food and drink team, and my colleagues and I deal with food businesses, from primary producers, right through the processing, manufacturing stages, to retail outlet at the far end. So we are regularly advising businesses, of all sizes, in this sector, and I just wanted to touch on some of the things that I think are going to be important for them, going forward in a post-Brexit world.

So I just wanted to quickly gallop through some statistics, because I think this is important. The import and export of food and drink products is hugely important, for businesses in the UK, ultimately, for consumers. In 2016, UK food and drink exports exceeded £20 billion, and of that £12.1 billion were exports to the EU, whilst £8.1 billion went to the rest of the world. So over 60% of the UK’s food and drink exports go to the EU, at the moment.

Conversely, only 52% of food, by value, that’s supplied to UK consumers, is actually produced in the UK. 29% of our food is imported from the EU, and the remaining 19% is imported from the rest of the world. It’s clear that the UK is far from self-sufficient, when it comes to food. And it’s also clear to me that the EU plays a very important part, at the moment, in terms of where we get our food from.

What that means for consumers? Well, 10.5% of household income, across the board in the UK, is spent on food and drink, but in the lowest 20% of income households that goes up to 16%. So increases in food prices, results in a disproportionate effect on lower income families. It’s a no brainer, in the sense, it’s common sense, but I think it’s a stat worth dwelling on for a moment. What’s really important, therefore, is that, for consumers of all kinds, we need to think about how we’re going to ensure that we have a continued supply of quality and affordable food.

There may well be opportunities to trade with other countries, and to increase the levels of trade with other countries, but for the moment, we have to remember that 29% of our food comes from the EU, 60% of our food and drink exports go to the EU, and it’s a market that is going to continue to be very important to us. So I just wanted to gallop round some of the things I think are worth focusing on, when we’re talking about what happens post-Brexit.

For food businesses, understanding the EU regulatory regime around food and drink, is going to be increasingly important. At the moment, our regimes on food safety, food labelling, and so on, are intertwined with the EU but once we separate, there’s going to be an increasing level of divergence, I would suggest. So for businesses who are dealing with imports and exports from the EU, they’re going to need to understand both the UK regulatory regime, and get to grips with the EU one, as it starts to differ, to some degree, from our own.

To my mind, the key element to maintaining access to affordable food for consumers, is to ensure that we have suitable fit for purpose trading agreements. It’s not clear at the moment what our tariff regime is going to look like post-Brexit. As members of the WTO, we’re bound by the rules that govern that. And the UK’s position, in terms of exiting from the EU, is absolutely unprecedented, not just for the EU, but for the WTO and trading worldwide, so no one’s quite sure how this is going to work in practice.

The suggestion is that, we will take the tariff schedule that’s been agreed between the EU and the rest of the WTO members and sort of, cut and paste it into our own schedule, but actually legally, we ought to be getting sign off from other WTO members. We have no clear understanding of whether they are going to agree to that, and we have no understanding of whether the EU are going to agree to that either.
Current EU tariffs are particularly high for food and drink products. We’re looking at figures of 11% for imports on fish, food, and vegetables, 16% for cereals and animal products, and dairy products are an eye-watering 37%. So cutting and pasting those schedules without anything else, in terms of free trade agreements, is going to have the potential to impact hugely on the cost of food in the UK.

KPMG, recently carried out some analysis on the potential price increase to a standard basket of food products, to make up the Great British fry up, and came to the conclusion that it could result in an increase of 12.8% on the current cost. And the BRC report, published last week I think, was talking about rises of up to 30%. So it’s an important issue, and one that the Government is going to have to get to terms with.

At the moment, the UK Government, is merrily producing policy papers about how it sees trade going forwards. The problem with that is, that the EU is currently refusing to negotiate on these kind of post-Brexit issues, while we’re still working out the deal on the divorce settlement between us and the EU.

So for the moment, when we’re talking to our clients, we’re really saying, prepare for the worst-case scenario, assume that you are going to be facing increases on the prices of your imports to the extent that you’re importing from overseas, and factor that into your costings, in the short term at least, going forward. So prepare for the worst, and hope for the best, I think, is really the advice for the moment.

What’s really important, is that we all work together as a sector to urge the Government, to lobby the Government, to persuade the Government, to mitigate the cost, potential cost increases for food, and for the agri sector more widely. The Government’s just launched a consultation, the EFRA Committee, has launched a consultation on trade in the food and agri sectors, and my advice would be for all of you to have a look at it, to put some comments into that, so that we can persuade the Government to take a robust approach, when it comes to managing this potential problem.

Along with trade tariffs, there are going to be inevitable changes to the practical and administrative processes at the UK’s borders. And again, I think we need to work together, to urge the Government to come up with some policies that are going to enable those controls to be as relatively hassle free and speedy as possible. There’s going to need to be investment in infrastructure, in IT, and so on, to assist with all of this. If we get this wrong, this is going to have the potential to impact on the cost of food coming into our market as well.

Mutual recognition agreements have been bandied about, as a means of continuing to ensure that there is smooth trading between us and certain countries. At the moment, we have mutual recognition agreements with certain countries, but those have been signed up on the basis that we’re members of the EU. It’s not clear to me how we’re going to... the extent to which we’re going to be able to just, again, cut and paste those into our own systems going forward, so there’s some thinking to be done around that, I think. Authorised economic operators, it’s a system that already exists, and I’m starting to talk to my clients about making sure that they’re signed up to those, just to minimise the scope for hassle for them going forward.

So there are two issues here, and I think, and they’re potentially at odds with each other. One is the affordability of food, and the other is the issue of quality and integrity of supply, and I think they’re both really important issues for the sector. The UK has broadly taken a very positive sensible approach to issues of food quality, and security, and integrity, they take it seriously, as do consumers. Defra’s 2016 food stats, showed that the two single most important factors influencing consumer choice of products was price, and then quality.

This is where I think we’ve got some real opportunities with Brexit, to take steps to really think about and reshape the food and drink industry in the UK. We’re already known for our high standards of welfare and quality, and I think there’s an opportunity to think more widely about encouraging a focus on sustainability, integrity, and so on, of British products. It’s going to help consumers, it’s going to give them comfort, it’s also going to, potentially, add value for food businesses. I’d really like to see a Government backed system, some kind of regime that enables businesses to authenticate the origin of the products that go into their foods, to help increase, as I say, consumer confidence.
There are initiatives already in motion. Organisations are looking at using blockchain technology to enhance and use these sorts of systems to provide transparency, and promote integrity within the food businesses here in the UK. Enhanced schemes around the Red Tractor scheme, something of that nature, I think will be very hopeful. What’s really important, in conjunction with that, is for there to be some kind of centralised consumer information programme, so that consumers really understand what these systems mean, can rely on them, and make choices based from an informed basis.

So I’m urging the Government, and all of you, to work together to adopt a robust, and possibly even a radical approach, to this sector going forward. I think there’s a lot on the Government’s metaphorical Brexit plate, if you like, and they’ve clearly got a lot to think about, but I think the more vocal we can be about some of the issues collectively, the more chance we’ve got of a brighter future.

Thank you.

Phil Bicknell:

One of the things that just strikes me, as I talk about Brexit, is that for 25 years our food industry has been... when it comes to trade with the rest of Europe, it’s all been about removing barriers, and having frictionless trade. So one of the things you started to touch on there, Sian, was if we start to see border inspection posts, then that adds delays, and that adds costs, so it’s probably an area, hopefully, we’ll pick up a little bit more in terms of the questions.

We’ll move on. I’ll introduce Pawel Swidlicki, from Edelman. Pawel, reading Pawel’s bio, he’s got an awful lot of experience and insight to pack into the next ten minutes. So we’ll hear from Pawel, and then I’ll invite the three speakers we’ll have heard from so far, to join me on the panel, and we’ll have a bit of time for questions. Over to you, Pawel.
The impact of Brexit - trade, standards and meeting global commitments
Pawel Swidlicki, Brexit Analyst, Edelman

Thank you very much.

So as we’ve heard, over the 44 years of the UK’s EU membership, our agri-food system has become hugely intertwined with that of continental Europe, so it’s going to be a big challenge to unpick this. What I always say to people is that, you shouldn’t conceive of Brexit as a fixed event, it’s a process, with a huge number of variables, and a very wide range of potential outcomes, both for the UK and the EU in general, and for the agri-food sector specifically.

I’d like to touch on three key interlinked variables. The first is, the shape of any UK/EU deal, what that means, will we see a softer Brexit, or a harder Brexit, and I will explain what I mean by those terms. What the UK’s non-EU trading relationship will be, you know we hear a lot about this global Britain concept, will we be signing new and exciting trade deals with other countries, and what that means for the agri-food sector. And finally, about domestic policy. I don’t want to go too much into that, Professor Godfray already touched on those issues, but there are a few points I want to pick up on.

So beginning with the Brexit negotiations, and the UK/EU deal. As we know Theresa May, tomorrow, is giving a speech in Florence, where she hopes that she will be able to kick start the next stage of talks, so that we will be able to move onto the parallel track of discussing the new trade agreement. This is now where a lot of the debate is, within the Government, and within the broader political environment.

What actually... What kind of Brexit do we want, do we want to retain close trading links with Europe? And that will, to a large extent, entail, you know not fully maximising the opportunities of taking back control, as the Referendum slogan was. Will we still sacrifice a bit of control for a bit of access, and where exactly to draw that balance? And this is where it’s hugely relevant, the fact that Norway, which is probably the softest version of Brexit that you could conceive of is the Norway option, which is staying within the European Economic Area.

Even Norway does not have frictionless trade with the EU, when it comes to agricultural goods there are... it is relatively liberal, and there’s been another round of liberalisation recently, but even Norway faces barriers to... in terms of agricultural trade with the EU, that it doesn’t face in other sectors, where it is fully integrated into the single market.

My go to example is fish. Norway has a very low tariff on raw fish, but a higher tariff on processed fish. So the way that the Norwegian salmon producers get around that, is that they export their raw fish to countries like Poland where they've established their own smoke houses. And then once that product has been refined, it’s then re-exported within the EU, so that they don’t have to pay the additional tariff.

So that’s obviously something to think about for British producers that, even the most soft Brexit model, will still entail some disruption, relative to where we are now unless we can negotiate something very, very bespoke.

But it’s important to remember that trade with the EU isn’t just about tariffs, there’s a lot of other factors, regulation, standards, immigration, all these things also come under the EU and the single market, and these are all problems that will have to be grappled with by the Government. You know how do you address concerns about immigration, while also ensuring that the sector can have sufficient a supply of seasonable labour.

Now moving our focus away from the EU for a minute, to the wider world. One of the great opportunities of Brexit, that we hear so much about, is the opportunity for these new trade deals, and especially among the
more free market orientated Brexit supporters. This is one of the key wins, is the opportunity to negotiate these new trade agreements, which will bring down food prices, here in the UK.

The Economists for Britain Group, a pro-Brexit outfit during the Referendum campaign, calculated that food prices in the EU were 17% higher than in world markets. And they believe that striking these FTAs with the likes of the USA, Japan, but also India, China, Brazil, that will give the UK consumers access to new markets, which will bring down prices.

However, it’s not that simple, because if we want to maintain close ties with the EU, that will probably entail mirroring their legislation and their food safety standards as, for example, both Norway and Switzerland do. Now those countries are able to strike their own independent free trade agreements but because they have to adhere to EU standards on things like SPS, it does restrict the scope for what they can do.

And if you remember when Liam Fox was in the US recently, and he was being badgered a lot about chlorinated chicken, that’s, I think a good example, because the US food safety regime is noticeably different to the EU one. And for a country like Britain, it will face quite a radical choice, do we want to stay aligned with the EU model, or do we want to seize the opportunity of being able to negotiate our own free trade agreement with the US.

But if we go down that road, it’s very hard to see how we can avoid having to take on American standards. And that’s something that will be politically controversial, especially if, as Sian was saying, the idea is to present UK food as a hallmark of high quality food, rather than cheap food. So there is that trade-off, that can’t be completely dodged, between prioritising quality, and prioritising cost.

Moving on to the Irish border situation. This is something that’s incredibly politically sensitive, it’s not just a technical problem, it’s very much a political problem, because during the Referendum campaign, both sides said that no one wants to see a return to the borders of the past, but if you have two entities with different food safety standards, with different tariff regimes, it’s very hard to see how you can avoid that.

The UK Government’s position paper on the Customs Union, says that – and this is a direct quote – it says, ‘The extent and complexity of third country SPS and related checks, would clearly not be appropriate or consistent with the UK and the EU’s shared objectives to avoid a hard border to the movement of goods, and respecting the Good Friday Agreement.’

So again, we have a problem, whereby, one of the points of voting to leave the EU, was to take control of legislation, of food safety legislation, and our tariff schedule, but suddenly, it turns out that doing that, and actually changing it, has real life consequences for the Irish Border. So that issue is still deadlocked at the moment, both in Cabinet, where I think Philip Hammond, and other Ministers, are probably more risk averse in terms of the Irish Border. And people like Liam Fox, the International Trade Secretary, who wants to seize the opportunities of global free trade.

In terms of our tariffs, as Sian was saying, we are, at the moment, in the process of negotiating those at the WTO. And I’ve spoken to various people who... and I’ve had a range of views as to how easy this will be. Some people think it will be very easy, that it will be a relatively controversial cut and paste job, others think it will be more tricky, because it’s not just the EU that would have to agree, but all other WTO members will have to agree so in theory, if any one of them raises any objection, this could be a problem for us.

Now I’ve heard that they are trying to get around it, by working out the three-year average share of the UK’s imports, relative to other EU countries. For example, when it comes to New Zealand the idea is to work out how much lamb from New Zealand the UK imported over a three-year period, and subtract that, and put that into the new stand-alone UK schedule.
But the EU could make this process a lot easier, but for the moment, it’s decided it won’t engage in that side of things, or indeed in the potential grandfathering over of the trade agreements that we are party to, as a result of our EU membership, until we’ve made more progress on the EU’s immediate priorities.

Just very quickly moving onto the regulation side. It’s worth bearing in mind that 40% of all EU legislation concerns food in one way or another, so there is a huge body of law, that is currently in the process of being transposed onto the UK statute book via the EU Withdrawal Bill, formerly known as the Great Repeal Bill. And once this on the statute book, this covers everything from things like, use of pesticides, including neonicotinoids, this is quite a controversial topic where, the UK has long felt that the EU is too wedded to the precautionary principle and actually wants a more robust science based approach to things like pesticides.

So there’s a wide range of food related legislation that, once we leave the EU, and depending on the shape of any final UK/EU deal, could be up for grabs and could be revised.
The impact of Brexit - trade, standards and meeting global commitments
Questions and comments from the floor with Professor Charles Godfray,
Hope Professor and Director, Oxford Martin Programme on the Future of
Food, University of Oxford

Phil Bicknell: Thank you, Pawel. Yes, if I could invite Pavel, Sian, and Charles, to
join me at the front, and we’ll move on, and We’ve got about 15
minutes or so for questions from the floor. So if you’ve got a
question, put your hand up, we’ve got roving microphones. And just
to remind us, say who you are, and where you’re from.

Paul Gregory: From Food Solutions.
I’d just like to ask a question of the Professor, which is related to the
environmental issues. Now I understand we’re bound by the UN’s
Sustainable Development Goals, which are to put an end to hunger,
achieve food security, and improve nutrition, and promote
sustainable agriculture. Now this, apparently, overrides what the EU
has been doing in the past, and also its mechanisms. As far as, Sian
Edmund’s concern is, we were at a meeting at Digital Government
SANTE in Brussels, in June, and the Commission representatives said,
we will only deal with one body, we have five here, on foods…
Department of Health, Food Standards Agency, etc. And unless we
deal with one body, there will be no imports, and no exports. Now
that might well have been just a political statement made, I don’t
know the reality of it, but it does show some sorts of attitudes that
are there. And basically, obviously, all the food regulation labelling,
any exports to the EU must comply with EU labelling laws, and I can’t
see any change in the labelling at all, if we’re going to continue our
exports. Thank you very much.

Phil Bicknell: Charles, do you want to?

Professor Charles Godfray: What was your particular question? It was really fascinating, what
you were saying there, but your question was?

Paul Gregory: Does the UN Sustainable Development override the EU now because
we’re signed up to it?

Professor Charles Godfray: Well, I’m going to pass onto Sian, as a lawyer, but I don’t believe so.

Sian Edmunds: Yes. I can’t answer that question. I don’t believe so.

Pawel Swidlicki: I would just add that, the difference in the UN and the EU, is that the
EU has robust enforcement mechanisms, that it can actually enforce
its decisions on Member States, whereas the UN doesn’t have that.
So in practice, what happens is that the EU rules tend to win out.

Professor Charles Godfray: But it is interesting that the 17 SDGs, the Sustainable Development
Goals, explicitly include high income countries, as well as low income
countries, which I think is a very welcome rebalancing, because the
Millennium Development Goals were targeted largely on the
developing world.
Phil Bicknell: The question is one right at the back. In the meantime, just one from me. I suppose, how much of a challenge is it around... Charles, you were talking about the, kind of, resetting almost our view of public goods, but in terms of WTO, and some of the requirements there, and particularly on environmental issues, as I understand it, it’s all around income foregone. So does the WTO rules and requirements, kind of, hamper what we could do, from a farm policy perspective?

Professor Charles Godfray: I think the difficulty, we’re discussing this at the moment, and Sian, well, both Sian and Pawel, made the points very well, is that, until we know the post-Brexit settlement, which gives us, sort of, boundary conditions, it is difficult to have that discussion about what public goods are, what is going to be the latitude for the way we support our rural communities. I guess, my feeling at the moment is that, although it’s not worth getting into the details, until we know what those boundary conditions are, having greater discussions across sectors, by which I mean, all the people interested in the countryside and food production, so the agricultural industry, the many, many to her stakeholder groups; having that discussion, so that we’re in a better place to respond to the post-Brexit settlement is the priority, at the moment.

Phil Bicknell: So question right at the back.

Roger Trewhella: From Adela Booth Associates. First of all, a comment to Sian. When she talked about strengthening the Red Tractor, and looking to guard provenance, that sort of thing. That is possible, to some degree, at the moment, through the protected food name structure, which we’ve not been very enthusiastic about in the UK, which is fiendishly difficult to introduce in the first place, and there’s quite a cost afterwards, in ensuring that it’s enforced. So the detail required to negotiate these sorts of things is difficult, at whatever level it’s done. The question, to all the panel, picking up on Professor Godfray’s point about a granular structure, do they see any possibility, risk, that that could be achieved through the devolved Governments, and the political price may be that Northern Ireland or Scotland is allowed to retain certain standards, which England may not wish to adopt?

Phil Bicknell: Of course. I suppose, one thing to bear in mind, is that agriculture is a devolved responsibility, which creates some challenges. Pawel, do you want to take that one first, and then we’ll work back across?

Pawel Swidlicki: Yes. So this isn’t my area of expertise, as such, but from what I’ve heard, actually the Welsh and the Scottish Governments have already been much more forward thinking, and much more strategic, in terms of their agricultural policies. Whereas, in England they’ve just, sort of... no one really takes responsibility for it. I know it’s the role of Defra, but Defra hasn’t... they were supposed to issue a 25 year plan, and it got cancelled earlier this year pending probably what’s happening with Brexit. So I think, definitely, for the devolved administrations, there are some opportunities there. At the moment, because of the way the Repeal Bill is structured, with the, so-called, Henry VIII powers, there’s been almighty row between Cardiff,
Edinburgh, and Westminster about the power grab. The devolved administrations have accused the Government of essentially, rather than devolving more powers, post-Brexit, as was promised during the Referendum campaign, that they’re actually taking powers back. So at the moment, that’s a bit of a political bun fight.

Sian Edmunds: Yes. I would just add, I don’t think there’s an appetite, at an EU level, to enter into different, sort of, discussions, with different parts of the UK. I think that, my understanding is that, it’s very much a one size fits all approach is going to apply to us, and we’ve got to work out the issues, the internal issues, ourselves. And I think, already, that was being discussed this morning, in terms of Ireland and with the clear message that it’s up to us to come up with a solution to some of these problems.

Phil Bicknell: Yes, and I suppose, just from some of the experience where I’ve looked at rural development aspects, for instance, where you do see some differences, in different parts of the UK, I’m conscious that you can see common agricultural policy funds being used to, for instance, help the building of higher welfare poultry units, in some parts of the country, which aren’t eligible in other parts. Now what does that do? That skews where you see the investment, which, I think, there’s probably lessons we can learn from some of the regional approach that has been taken in the past, to informing where we want to be in future.

More questions. One in front here.

Dr Chris Bishop: From the University of Lincoln. And for some reason, I’m incognito, and not included on the list, so I’m your virtual guest. Really, I’m conscious of exports coming in, or food imports, from places like Pakistan, and Kenya. If we, after Brexit, have different food regulations, and diverge in our requirements, can you see any allowances being made for, sort of, developing countries, on a trade, not a, sort of, aid type policy being made in the future, or is that just something which is so distant, at present, that nobody is really considering that?

Sian Edmunds: Well, we’re bound by the… what the WTO says, because we’re signatories to it. So there are… we have to adopt an approach of the most favoured nation approach, which limits the ability for us to do some of these things, I would say.

Pawel Swidlicki: Yes, I think we could lower our tariffs, but we would have to lower them across the board, and that’s a bit problematic, if you’re trying to, for example, negotiate with the US, and you need leverage in those talks, and you say to them, well, we’ll lower our agricultural tariffs, if you lower yours, but if you’ve already lowered them for everyone, and that’s how the MFN principle works, then you’ve stripped yourself of that leverage.

Phil Bicknell: So, you know, that message is that inability to pick and choose effectively. Okay. More questions from the floor?

Lord Whitty: House of Lords.
I’m not on the list either. One time Defra Minister. Two things that I think have been missed, so far. One is, when we unravel the relationship with the EU, the EU has deals with many of those other countries, with whom we would wish to establish bilateral deals. And most of those deals, as far as commodities are concerned, also involve quotas. So there’s tariff quotas, and an assessment will have to be made, between the EU and the UK, as to how much of that quota remains with the 27, and how much remains with the UK. In the case of New Zealand of course, a big chunk of the stuff, in practice, comes to the UK. So that’s another complication. The other thing is that, we will have to have some equivalence of regulation with the EU, to continue to trade, it may not be absolute, but there is the question of enforcement. At the moment, much of the CAP is enforced by the Commission having infraction proceedings, and docking the single farm payment. We do not have the equivalent enforcement mechanism here, we would have to invent it, and probably have to invent it separately for each of the four nations. Now that... the method of enforcement, may not be the equivalent of the Commission’s. So equivalence of regulation is not only the substance, it’s also the degree to which the enforcement regime can also be seen as equivalent by the EU. They just complicate it with those considerations, but part of the deal will have to be addressing those.

Phil Bicknell: Thanks for that. I mean, Pawel, you touched on New Zealand and lamb, for instance.

Pawel Swidlicki: Yes. So that’s one of the things that I’ve mentioned is in the process of being worked out. Except, the EU, at the moment, doesn’t want to engage. The minute that the EU says, okay, let’s do this together, and with third parties, like New Zealand or like South Korea, with which we currently have an FTA, via our EU Membership, that becomes a lot easier, but what I’ve heard from Government sources, is that the EU is sitting back, until it feels sufficient progress has been made on the immediate divorce priorities. And only then when we start moving on to discuss the broader trade relationship then depending essentially, to put it bluntly, depending on how constructive the EU wants to be, then I think we can make some progress on that.

Just also a really quick point on enforcement. The Government has actually been... has actually put forward a paper, which has suggested that post-Brexit, there could be an EFTA Court set up, which would, essentially, entail the UK mirroring EU legislation, and ECJ case law. And I think this is a point of contention within the Cabinet, and within the Government more broadly, because the Ministers who are in favour of a harder Brexit, or, as they would call it, a cleaner Brexit, they don’t want to be hampered by having to continue to adhere to EU law and ECJ case law, even if it’s done on the basis that it doesn’t have direct effect, but that we voluntarily continue to apply it, because that will restrict our scope for domestic policy making, and for regulatory alignment with third countries. So this is really where the debate is, and if you saw Boris Johnson’s intervention over the weekend, that was one of the issues he is reportedly concerned
about, and is unhappy about, that we’re not going to do enough to take control, as it were.

Phil Bicknell: Charles, you wanted to come in on this.

Professor Charles Godfray: I’m not sure if this was the precise aspect of enforcement that you were thinking of, but I think, one of the interesting possibilities, if the UK did move from a single farm payment type approach to supporting the rural economy, to moving more towards payment for results, is that many of the issues round enforcement would disappear. And as a previous Defra Minister, and certainly for everyone I talk to in Defra, whenever they hear payment by result, then they immediately say, well, how on earth can this be implemented in the way that’s resistant to judicial review? And I think that there are really interesting technological things coming into play, that may make that type of regime possible in the future, which hasn’t been in the past. And to give a very trivial example, so at the moment, farmers do various rules, which tends to reduce the amount of sediment going into rivers, which is a good thing. Well, it’s possible now that one can, using remote sensing, there’s satellites and on ground sensors, to actually model exactly where sediments come from and allocate that to individual farms. So that’s an example where one could deploy payment for results, which would give better results, and would reduce the costs of enforcement.

Phil Bicknell: Which is a great point. I suppose, it’s how does big data and technology start to move things forward. I suppose, what I would say, from almost a farming angle, I think, one of the points of view that informed maybe some farmer’s views on the Referendum, would be around inspections and rules and regulations, particularly from Europe. I suppose, one thing to remember, if we have a policy, policy will invariably mean rules, rules mean that there needs to be checks on those. So I think, it’s one of the areas where, perhaps, there is a... just a bit of a, maybe a reassessment of what’s coming down the track, in terms of that.

We’ve got time for one last question, before we move on. The lady over there.

Jenny Barnes: From the Department for International Trade, the Agri-Tech Team. I was really interested in the Norwegian fish story, as I can see that our targets have recently included outward investment, which would make a lot of sense if we will be doing the same sort of thing. I wonder whether the panel would like to comment further on that, because I can see that it would improve exports, and get round the tariff situation, if we can do the same as Norway are doing?

Phil Bicknell: Pawel.

Pawel Swidlicki: Yes, I think that is an established precedent now. You know Scotland for example, where there’s, obviously, a lot of fish production there as well, that might be a viable model. In general, it, you know it doesn’t just apply to agriculture, I think, a lot of sectors now UK businesses might need to... again, this really does depend on exactly what relationship we have post-Brexit, but quite a lot of businesses
might feel the need to establish a physical presence within the single market, and then we’ll see that investment flowing from the UK into, you know into the single market.

Phil Bicknell: Charles.

Professor Charles Godfray: I mean, just a brief comment. This is not specifically a food system comment, but the biggest trend in globalisation, and the, sort of, second wave of globalisation, has been the complication of trade, and the fact that a single product, especially a technological product, can cross borders so many times, the intermediary trade. And Pawel and Sian probably have the figures in their mind. And it just means that, unwinding our relationship is going to be hugely complex, and actually probably agriculture might be one of the simplest sectors in which that happens.

Phil Bicknell: You say that, but you don’t remember the information about how many times a pint of Guinness crosses the border? There was, you know there was a number of times...

Sian Edmunds: Well, I think a lot of dairy products in Ireland cross the border something like four times.

Pawel Swidlicki: Five times, I’ve heard as well, yes.

Professor Charles Godfray: Okay, I correct myself, agricultural is as hugely complicated as the others.

Sian Edmunds: And I suppose, my stance on it would be, I’d like to see the food supply chain simplified as much as possible, because I think the more complicated it becomes, the more scope there is for fraud, the less clear about the integrity of those food products. It becomes much murkier, and much easier for fraud, and lack of transparency and integrity, to get into the system. So I’m all for keeping it simple, really.

Professor Charles Godfray: But Sian, could I just challenge you on that, because you mentioned Blockchain, and aren’t there technological ways you can have your cake and eat it?

Sian Edmunds: Yes. Yes. Yes.

Phil Bicknell: Back to big data again.

Sian Edmunds: It’s not perfect, none of it is perfect, though.

Phil Bicknell: Okay.

Pawel Swidlicki: It’s still in development, I think.

Phil Bicknell: We are out of time, can you just thank the panel for me. We are going to have just a quick change around at the top table, so if I can invite Jayne Brookman, Helen Ferrier, Lucy Bjorck and Helen
Munday to join me at the front and we will move straight into the next session.

And I suppose when we start thinking about the future of agri-food, where our industry is going to be, we’ve talked already quite a bit around some of the policy issues, invariably we’ve touched on some of the complex areas around funding, what’s the challenge in terms of that, of course there’s best part of £3 billion that currently comes from Common Agricultural Policy, what could the funding look like in the long-term, how might it be allocated? What does it mean in terms of some of our environmental obligations, responsibilities and indeed priorities?

So we are going to delve into some of these issues now with the panel. First up I will introduce Jayne Brookman who is from the Knowledge Transfer Network, so Jayne you’re up.
Supporting domestic food production and manufacturing - funding, ‘Green Brexit’ and sector priorities
Jayne Brookman, Head of Agrifood, Knowledge Transfer Network

Good morning everyone, my name is Jayne Brookman as Phil has just told you, and I lead the Agri-Food team at the Knowledge Transfer Network, and I’m here to talk to you about innovation funding, both now and into this post-Brexit future that we’ve been discussing earlier on.

The KTN, the Knowledge Transfer Network is funded by Innovate UK, which is the UK’s innovation agency that comes out of the Department for Business, Energy and Industrial Strategy, and Innovate UK, together with the research councils, will be folded into a broad structure called UKRI next year.

The KTN’s business is to support innovative companies, enabling them to develop and grow to the benefit of the UK economy, and the way that we do this is by connecting people basically, as outlined here, and the view is that by pulling people together that we will enable them to connect to the right people within the science base that they may need to develop their ideas further, to funders, and also to policymakers and to the right people in Government.

So support for innovation for the business base is available at a number of different levels and if we think about this from a sort of sector and geographical basis, if you’re a company and you want help with developing an innovative product, you can perhaps at a regional level look for assistance from your Local Enterprise Partnership and you have particular sort of groupings of support around things such as the Eastern Agri-Tech Growth Initiative, but a lot of the support that you might find for industrial research is going to come at a national level and for companies this would be, Innovate UK as the main source for industrial support through programmes such as the Knowledge Transfers Partnerships and looking a bit earlier up in the supply chain in terms of the research, you would get research councils that are providing support for the academics that would give you underpinning science to support companies.

Within the European framework of support, both academics and businesses can continue to make applications and the UK Government has said that it will underpin any applications that are made before we actually exit the European Union. Quite what will happen after the European Union exit, Brexit, we are not really sure at this moment. And then there are particular sector specific initiatives every now and again that come along that can support particular companies.

So as I said before the Innovate UK provides the main source for industrial support and focuses on providing money for industrial applicants, but often in association and collaboration with either other companies or with the academic base, and the agri-food companies, so companies within our own particular sector, can benefit from a number of different funding streams, so the way that Innovate UK funding is split up is through particular sectors and the main area for agri-food is going to be through the health and life sciences competition, but the manufacturers can look in, the manufacturing and materials, you also have the general open programme, and particularly for people who may be engaged in the agri-tech area you can look at the emerging and enabling technologies theme.

And the reason that I’ve put the numbers in here is to give an indication of the size of support available, and also the frequency, so these calls take place twice a year and under these different headings, and this support is likely to continue in this or a similar fashion for the foreseeable future.

Further up the research pipeline I said to you that the research councils tend to support academics working with industry to provide the strategic underpinning research that’s necessary for exploitation of science and technology by the UK companies, and I just wanted to give you a couple of examples of the types of projects that research councils have been fundamental in delivering in relationship to industry clubs, for example, in sustainable agriculture, in diet and health, and in animal health and here what we have is as group of companies coming together with the academic base and support from the research funders, to take a portfolio
of projects forward in a closed club that is then benefits both the academics and the industrial members in a pre-competitive space, all of this is in a pre-competitive space, and similarly a cross-council initiative took place last year on trying to get some particular projects going for food manufacturing companies (Priming Food Partnerships).

The EPSRC, so the Engineering and Physical Science Research Council has centres for innovative manufacturing and the one in food is a collaboration between the Universities of Birmingham, Nottingham and Loughborough to work with the food manufacturing sector to again try and make sure that the research that they are doing fulfils the needs for underpinning research from the sector.

We also have the very longstanding LINK programme and I want to just give you an example of a recently announced project in this, and I just think it’s a really good example of how we should be looking at trying to marry the needs of industry and the research base together.

So the BBSRC provided LINK support to the Universities of Aberdeen and Glasgow in collaboration with the Scottish Aquaculture Innovation Centre, so funded by the Scottish Government with support from Scottish Enterprise and Highlands and Islands Enterprise, I believe, but working with 8 aquaculture companies in a pre-competitive way to address something that is of benefit to protecting the UK brand, so coming together and working together.

So that’s a sort of very quick view of where we are up to at the moment. More recently what’s happened with the Government announced the National Productivity Innovation Fund in the last Autumn Statement and part of that is the Industrial Strategy Challenge Fund which is a way of providing support to fund innovative businesses and the corresponding research base across all of the sectors. Now the first wave of that wasn’t particularly helpful or beneficial for the agri-food sector, but we have two proposals that have gone into the second wave which will be determined this autumn, and basically one of those is on agricultural productivity and the second one is on food and drink productivity through digitisation of manufacturing and these ways of supporting are aimed for spend in the next 3 years, but delivering impact over the medium term in the sort of by 2025 type of window.

So post-Brexit, we’ve already talked quite a lot within the earlier presentations on international trade and Helen, I know is going to talk, Helen Munday is going to talk about that in her presentation, and the way that Innovate UK is at the moment trying to support the policy around developing particular agreements is a way of looking at achieving early gains with compatible countries, in a way, in terms of the history and their current and future technology requirements. So looking for something that’s going to give you best fit and so this is an example given here. (Canada slide)

Finally I wanted to just reflect on the future of innovation for the UK food and drink and basically I think data is going to be very important, resilience and responsiveness, looking through the lens of a circular economy

I wanted you to consider that if you need any assistance to contact the KTN, and this slide just shows you an online tool that we’ve developed to help the agri-food businesses as an example.

Thank you very much for your attention.

**Jayne Brookman’s PowerPoint presentation can be downloaded from the following link:**
[http://www.westminsterforumprojects.co.uk/forums/slides/Jayne_Brookman.pdf](http://www.westminsterforumprojects.co.uk/forums/slides/Jayne_Brookman.pdf)

**Phil Bicknell:** Thank you Jayne. We will move straight on and our next speaker is Helen Ferrier from the National Farmers Union. Helen is currently heading up the Policy Services team at the NFU. Helen I should mention I’m an NFU member, by the way, just in case....

**Dr Helen Ferrier:** I know, you remind me of that frequently.

**Phil Bicknell:** Over to you Helen.
Supporting domestic food production and manufacturing - funding, ‘Green Brexit’ and sector priorities
Dr Helen Ferrier, Acting Head of Policy Services, NFU

Thank you very much.

Those of you who know me might have spotted that this isn’t my normal voice, so I hope that I will make it through to the end of my 10 minutes. I would also normally pace about, but I think I’d probably better stay behind the microphone on this occasion.

So, clearly we’re living in turbulent times. Some people would say interesting. Certainly, there’s a great deal of uncertainty, and not an insignificant amount of confusion, plenty of reports, plenty of groups being set up, plenty of opinions out there. And I think lots of divergent opinions, which when those are amongst members of the Cabinet, can cause some difficulties for keeping track.

I think in this presentation I’d like to go back to basics, just to remind us all what it is about agriculture that makes it so important for our country. I’d also like to talk a little bit about the NFU’s work. As a representative of around 55,000 businesses, we’ve got a massive stake in what happens with Brexit and on future policy, and we’ve got staff across our policy directorate who are doing a huge amount of analytical work and internal discussions and also discussions with our members, with Government and with other organisations to try and get our heads around what’s going on. And I’ll set out some of the challenges around productivity and competitiveness, and also our key asks of Government at this time. To make sure that we’ve got... the UK has got a thriving, vibrant, agri-food industry in the next 2 years, 5 years, 10 and 15 years ahead.

So, this is just a reminder of why farming's important to certainly the economy, to the environment and to wider society. It really talks about what farming is responsible for, and this is why it's in the country's interests to back British farming and actually this is why it's important that we look at productivity and we address concerns that we have about productivity. Without resilient, productive and profitable farm businesses, none of that is actually going to happen.

And this is the other thing that concerns us, and it concerns the Government too, and I'm sure everyone in this room is familiar with this chart, it's been used many times. It was a key challenge that was addressed by the Agri-Tech Strategy and it's really looking at total factor productivity. Which is a measure of how well any industry, this is obviously for agriculture, but how well industry turns inputs into outputs.

We're looking here at the rate of improvement in agriculture productivity in the UK. The problem is that it's at the bottom, compared to other key countries. And obviously for individual businesses, short term fluctuations in productivity, maybe due to weather, to pest and disease pressures, to exchange rates even can cause problems in the short term. But actually those kinds of issues around long term productivity are really critical to farm incomes and to competitiveness. That graph hides an awful lot of detail, obviously that's an average over all the sectors, all the different elements that go into productivity.

And actually, what's interesting is it's not just agriculture that's got a problem. There's... you know, green is good generally, isn't it? And red's bad. There's not that many areas and sectors that are above the line. I apologise that you can't actually see the words... all the different sectors, but you can easily find this data. It's ONS data and it's some CBI analysis of the data. So agriculture is here. So, financial services is struggling, pharmaceuticals is struggling, even the creative industries that the Government points to as something that's a real boon in the UK economy, they're all struggling. Some sectors around distribution administration that currently are doing rather well.

So, we'll move on from boring graphs to a beautiful photo of the farmed environment that we're actually talking about here. And the central business of farming is, as we can all understand, producing food, but actually the farming economy is very much more than that.
So, the farming economy is much wider than just producing food. 62% of farm businesses in England have some sort of diversified activity going on, and that’s generating an income of around £580 million a year. Renewable energy is a really vital part of the mix when it comes to farm businesses. Farmers own or host two thirds of the country’s solar power generation, and over half the anaerobic digestion capacity, the majority of wind power. So, really the management of the countryside and how natural capital can deliver the ecosystem services that we want to see is reliant upon the ability of businesses to be productive, and resilient, and profitable in the long term. Without that productivity and without fair returns from the market place, those environmental goods that we want can’t be delivered fully by farmers.

So, I’ll just tell people… some of you may have been keeping up with the NFU's various papers and so on, on Brexit. As all organisations, we're desperately trying to understand what's going on and to prepare for the future, and to think about what it is that we might want to see. So, over recent months we've been developing four key areas of the NFU's policy work, and some vision papers around these.

So, trade obviously very important and we've heard a lot about that this morning, free and frictionless trade with the EU, given that it's by far our largest trading partner. And those trade deals with the rest of the world have to be balanced and fair. Labour is absolutely key to British agriculture, both the seasonal workers that often get a lot of the press, but also permanent workers, particularly in horticulture and poultry.

Domestic agriculture policy I will come on to in a bit more detail. It's got to be designed well, for all of the reasons that I've already covered. And there are opportunities here to do domestic policy and legislation in a smarter way. And what we need from regulation is an enabling regulatory set up that's really got to be based on robust evidence. We've got the science base to deliver that. And that should help businesses to be competitive and to retain access to the markets that they need.

Around our domestic policy work, which is particularly something that the experts in my department are working on at the moment. What we're looking at are three interlocking cornerstones of domestic agriculture policy. It's absolutely vital for a successful Brexit, to be able to deliver future domestic agriculture policy and a regulatory framework that's based on sound science, and that encourages productive and sustainable farming.

The way our vision works is these three elements. The future policy has got to enhance productivity and the competitiveness of farm businesses. It’s also got to reward and recognise the environmental goods that farmers deliver. And it’s also got to deal with the volatility that farmers are exposed to. That area is the subject of a whole different conference. There's huge amounts of detail in there. We're doing a lot of analysis in that area, to really understand how, we can, in the future, mitigate that volatility where it impacts on business’ commercial viability.

So, it's clearly too much to fit into 10 minutes. A little plug: We really rely on our internet and social media channels to communicate with our members and to show them what we’re doing, to justify what they’re paying us to do. So, we have a channel on our NFU website, and right now we’re consulting on the detail behind each of those three cornerstones. We’re going out around the country and talking to our members about, what are the approaches? What are the asks that we should be taking to Government?

And actually nobody knows which way it's going to go. But it's absolutely clear that the diversity and the vibrancy of the British countryside relies on a really well thought out and a properly delivered Brexit, and a transition period that's set by Government now, to ensure that we have that continuity and certainty so that our British farming businesses can thrive.

Thank you.

Helen Ferrier’s PowerPoint presentation can be downloaded from the following link:
http://www.westminsterforumprojects.co.uk/forums/slides/Helen_Ferrier.pdf
Phil Bicknell: Thanks, Helen. For me though, kind of one of the reminders there is thinking about, from a volatility angle, actually we've gone through from a farming perspective, we've gone through some really massive challenges over the last decade. Volatility has been a big challenge for farmers anyway, and I suppose that just intensifies in a post-Brexit world.

We'll move on to hear from Lucy. Lucy's Senior Policy Advisor at RSPB. I know RSPB have got a kind of range of views in terms of where policy should be going, so looking forward to hearing from you, Lucy.
Supporting domestic food production and manufacturing – funding, ‘Green Brexit’ and sector priorities
Lucy Bjorck, Senior Policy Adviser, RSPB

Thank you, and thank you for inviting me to speak here today. We've talked at quite a high level and then gone into some quite specific details. To begin with I want to take us back up to the higher level and talk about why the RSPB are interested in this. For those of you who are not familiar with the RSPB, we are the UK’s biggest wildlife charity, we have 1.2 million members, I know there are some in the audience today, thank you for your support. And we care about food and food production because of its impact on wildlife in the UK and globally.

So, I just want to start with a couple of figures. Just to really get us thinking in a really global context, on the impact on food production on agriculture. Two reports here, the first one is a WWF report, Living Planet which found that species are increasingly affected by the pressures of unsustainable agriculture and fisheries. Closer to home, the State of Nature report in 2016, highlighted the continuing declines in our home-grown wildlife. Farmland birds down 54% since 1970, and butterflies continuing to decline, 41% since 1976.

Now there is some good news. I don’t want to come on and be doom and gloom. Certainly the declines in the UK have slowed in recent years, and we work with some fantastic wildlife friendly farmers and it was brilliant to see some of the wildlife stats on Helen's slides.

We know what can be done, but nevertheless the declines are continuing, and so we need to do more and we need to do better. And globally the situation is really quite dire and I will come back to that later. So, there's no simple solution to any of this and as we've heard, it's uber-complex. We need action on multiple fronts, our land use policies, our food policies, our trade policies, and our environment policies. But if there is one good thing about Brexit, it's that it is giving us this opportunity to look at these policies in a more joined up way. And if we can get this right, the economic benefits could really flow from that, in terms of, better health, both for our wildlife and our populations, lower pollution, more resilient soils, and those thriving rural businesses that Helen referred to.

Key to success across the food sector is remembering that impact at a local and global scale, really thinking about the sustainability. Sustainability is the real key to food security. If we continue to produce in an unsustainable fashion then, long-term, things look pretty bad.

I'm going to talk a lot about sustainability and I'd like you to think really about the sort of values that have been touched on today about high-standards Britain, and how they should underpin both the policies and the business strategies, we all have a role to play in that.

So, a green Brexit, a more sustainable future, what does that mean? Well, the Government set out it's stall in terms of wanting to leave the environment in a better state than it's found it, and we really welcome some of the statements that the Secretary of State, Michael Gove’s made in recent days. He is keen to redesign our agriculture policies in a way that mean that they are more productive, but more sustainably so.

I think it’s worth bearing in mind that the vote for Brexit, which was a very close one, was a vote for bringing our decision-making closer to home. It wasn't a vote for lower standards, people have voted in good faith for a better quality of life, and we need to make sure that we deliver that.

I don’t think there can be any doubt that some EU legislation, such as the Birds and Habitats Directive which is obviously close to our hearts at RSPB, is a really important and effective bit of legislation. In fact it was under intense scrutiny recently as part of the refit process, which showed it to be some of the most effective nature conservation laws in the world. As we leave the EU we need to make sure we bring those really effective laws with us.
And equally I think we can all agree that although the CAP has had some improvements in recent years, it's been one of the most damaging EU policies for the environment. So, the opportunity to step away from that and do something better is really exciting.

So, what would RSPB like to see as part of a green Brexit? Well first of all. That clear direction to continue from Government, that this is about safeguarding the environment and not lowering our standards. A clear direction of travel, is really important.

Underpinning this we think we need to bring through those robust environmental baseline standards that currently exist, and make sure that we enshrine them in any new legislation. I think that's important, it can help avoid the shocks that Helen referred to there, a really strong environmental baseline. And of course we're going to need new institutions, as has already been touched on, to make sure that these baseline standards are effective.

I am going to touch on the mantra of public money for public goods, that Charles referred to earlier. We need a new land use policy which really rewards food producers for their environmental management, where there is market failure. And that can provide a foundation of really sustainable management in the long term. And I think that helps with some of the risk elements that Helen referred to. When I speak to groups of farmers, they don't actually seem that worried about new risk instruments. They say, we’re farmers, managing risk is what we do. And I think it's supporting them to be able to have diverse enterprises so that they’re not facing cliff edges when there are unfavourable conditions.

But I also want to not just focus on those agriculture policies and really go back to this theme of joining up policies across the piece, because from a global point of view, we're not going to tackle some of the pressures on wildlife through just smart policies, we need to tackle consumption as well. And we think there's a much bigger role that Government could be playing in tackling unsustainable consumption, promotion of sustainable and healthy diets, reducing waste. So, there's an opportunity there for the Government to step up and do more as we begin to reshape our own policies.

Back to that issue of high standards, both at home but also the trade discussions we had in the last session are really interesting. How do we make sure that the things that we are importing under these new trade deals are sustainable? We don't want to be exporting our environmental footprint overseas.

And fairness in the supply chain, I think, is also really important, and I’m going to come back to that slightly later. And of course to make sure that Brexit runs smoothly, we're going to need really good transition arrangements, and I think the innovation element that was referred to by the previous speaker is really important.

So, what should the priorities for policy makers be going forward? Certainly, for effective protection of the environment, it's important as we leave the EU, we have common UK standards as we’re discussing in the previous session. This’ll help avoid that race to the bottom. And equally we’re going to need new institutions to apply the appropriate governance and oversight once we’re outside the ECJ. Trade policy will play a major role in determining the macro-economic context in which the sector operates, and also the regulatory environment. It must be a priority to ensure those trade policies support the objectives of more sustainable land management and food production of putting high standards at its core. A changing trade environment can have really dramatic effects on the environment. If you think about it in terms of shifting to a particular commodity elsewhere could result in dramatic reductions in rainforest in that area if the safeguards aren't in place.

Another priority must be to secure adequate funding, which has already been touched on. So, we currently have a £3 billion budget for the CAP. We know from previous studies that meeting all our current environmental obligations, will cost us about £2 billion to meet our biodiversity objectives. So, we need to make sure that we do retain some of this budget and don't see it disappear all back into Treasury. To make
sure that we can meet those commitments, both the ones that we've set ourselves and the sustainable development goals that have already been referred to from the floor.

One of the things that farmers have had to deal with particularly in England, is some fairly poor systems recently, one of the priorities should be to really build on what we know works and improve the schemes that we currently have. So, we know our Agri Environment Schemes can be really effective and organic certification we know delivers real results for biodiversity. So let’s build on some of those and make sure that we learn from those. But in addition, look for those new approaches, innovation and payment for results.

So, where does that leave us in terms of opportunities? Well, going back to those alarming statistics that I quoted at the start, we have the opportunity to help reverse the impact of the food and farming sector on the environment, both through tackling sustainable consumption, requiring those high standards, implementing best practice.

On the arable farm that we own and manage in Cambridgeshire, we’ve shown that it’s possible to both remain profitable and reverse the wildlife decline. So, we’ve had a 200% increase in farmland birds and a 123% increase in butterflies since we took over management in 2000 and that's against the backdrop of national declines.

Brexit provides that opportunity to develop those integrated policies, which I referred to at the beginning. Building on the ambitions set out by the Secretary of State, we can position ourselves as a high standards economy, celebrating the best rather than getting ensnared in a race to the bottom, and develop a more integrated suite of policies. I think the discussions around the price of food, we shouldn't get hung up in trying to deliver or solve the problem of people not being able to afford to buy food solely through a food policy. There are clearly other social policies that we need to address those through. And we need to make sure that public money is really delivering for society. So, linking that clearly to the benefits that deliver for society. I’m all for having a broader debate on that as Charles referred to. There are publications coming from the environment sector, which include a whole list of NGOs, including people like CPRE who would broaden the debate from just pure wildlife.

I've had the red card so I'd better go. Thank you for your attention.

Lucy Bjork’s PowerPoint presentation can be downloaded from the following link: http://www.westminsterforumprojects.co.uk/forums/slides/Lucy_Bjork.pdf

Phil Bicknell: Thanks, Lucy. Some thought-provoking stuff packed into that ten minutes, and I know I've got a couple of questions that follow up in terms of the future policy too.

Just to finish off our speakers, I'd like to introduce Helen Munday. Helen, I know she spoken at Westminster Forum events before, and I know that herself and lots of her colleagues are involved in lots of discussions around Brexit as well, with a lot of my colleagues involved in that too. So, over to you.
Supporting domestic food production and manufacturing - funding, ‘Green Brexit’ and sector priorities
Helen Munday, Chief Scientific Officer, Food and Drink Federation

Thank you, and being here means that I'm not at our EU exit committee meeting today, so I might have had a bit more of an update had I been there, but here I am.

So, clearly this is a very hot topic for us and for our members. And it's one that we are looking all the time to update our position on, and make sure we understand what the issues are and for the wider interest group, to take that group with us. These are some of our members <on the screen>. We don't have 55,000 of them unfortunately. As many of you will realise there are a few very big companies, there are some medium sized companies and there are a whole lot of small companies.

This was Ian Wright, our Director General at the NFU conference earlier this year saying that ‘if you can't feed a country, then you haven't got a country’. And I think that really is the ultimate point on sustainability of our sector and the resilience of our sector. That it is a sector of national importance and it’s also one where clearly people are very emotional about the topic of food. Everyone can engage in that topic and many people will have an opinion on that topic. And it is of national significance and importance and sometimes that seems to get slightly lost in the dialogue on Brexit I think.

These are some of the key things that as the FDF and our members, we are putting at the forefront of our considerations and our points to get across to Government. We are also with the NFU at the party conferences over the next few weeks, having some discussion groups on these types of topics. And clearly these are not all topics that we can discuss today, but the access to workers is very critical both within manufacturing and in the supply chain as a whole. We've heard already a lot about the importance of future trade agreements with the EU. I've got one slide on that which I think almost is exactly the same as what Sian presented but in a slightly different format.

The regulation side of things is clearly of paramount importance, including the environmental regulations. And the piece about safety and quality standards for consumers. I mean, consumers are the ultimate end point and we mustn't lose at any point, considerations that the consumer is the ultimate purchaser of products from that supply chain as a whole, and we should maintain the levels of quality and safety that have been hard fought for over many, many years. I don't think there's anyone in any part of our sector that wants to take a ‘dive to the bottom’ or even just lower than we are right now, on either of those topics.

Ireland we see as a critical touch point. It brings to the surface many of the issues which will be common for all of the countries with which we trade, but really is epitomised in that one border. And we hear about transitional arrangements, whether there will be transitional arrangements, whether there won't be, but we are not far from the point of exit and we need to be understanding that very soon. And clearly whether you supported the idea or whether you didn't, we all have to see what the opportunities may be. There's potentially some pain along the way, but we have to try and find what those opportunities are, including to grow.

So, here's the numbers that are remarkably similar to Sian's because they come from the same source, of course. So, I won't repeat them, but clearly exports are incredibly important. We are not as self-sufficient as many might think we are, although actually this has been incredibly stable over years. The things we import may be different, but the amount and value of what we import is remarkably similar. And it's not just the amount, it's the way that we have to do that in a ‘just in time’ way. And maybe that hasn't been talked about much today, but it is said that we could have empty shelves in four days if the borders don't work well. And we know there's lots of things that impact imports including weather in other places. You know, who can forget the ‘Iceberg Lettuce crisis’ of earlier in the year. And if that was reproduced for every single fresh produce item that we brought into the country, then who knows what could be the result. But they are limited shelf life, factories don't have the storage space that they used to have. It comes in, it gets used, it gets
sent out, and that piece is incredibly important to our resilience as we go forward. And clearly the regulatory and non-regulatory factors, facilitate, or not, the movement of goods. And so it’s of vital importance.

In terms of the food safety and regulatory side of things, over 40 years in Europe has brought us to where we are today and we mustn’t forget that we were part of that. We didn’t sit, on the side-lines, watching someone else do this to us, we were part of the negotiations, we were part of bringing this into our statute books. And there will be many that will say that we did that in good faith and we did that for all the right reasons, and that we shouldn’t be prepared to let that go or indeed want to get that go. The notion that regulatory framework is not fit for purpose is not the correct one. It is fit for purpose, and it protects both consumers, and our businesses, and the supply chain as a whole, and the environment, in a way that if we were to remove regulation in a ‘willy nilly’ fashion you might say, would be very unfortunate.

The Government has committed to no reduction in food safety quality standards for consumers, or animal welfare, and that it certainly something that we would support. Key points I guess are continuity at the point of departure. I understand that there’s around 6,000 pages of food regulation that needs to be gone through, word by word and transposed. Success on day one, has to look like everything works the day before in the same way that it works the day after. I wouldn’t expect any massive change. The change, if it occurs, will occur afterwards, not on day one. And we should aim to get that continuity absolutely pitch perfect and if there is divergence afterwards, whether it's around devolved Governments, or otherwise, that should be managed extremely carefully, and with our eyes wide open.

There are some key things that we could debate today, or we will debate I'm sure over the next few months, as has been going on already. Key questions around things like, access to the European Food Safety Authority, who currently do much of the risk assessment that potentially, if we didn't have access to, we would have to bring that in-house. And certainly the Food Standards Agency, and it was mentioned at their board meeting yesterday, are clearly putting a lot of thought into how that could be done. Time and time again we see the importance of the rapid alert system, the RASFF system, and intelligence sharing, which works well across Europe. Okay, it might not be perfect, but it's a damn sight better than starting from scratch and not being able to do that.

We have phytosanitary rules as well as the very tight rules around meat etc. at borders. Any delay at borders, as I've said, will have a big impact upon the supply chain. And also there is a lot that goes on in third countries in terms of approval of meat plants etc., that is done on our behalf, by the EU, we pay for it, of course we pay for it, but would we have to set that up ourselves?

And in terms of EU operatives, it is not at all the case that all EU operatives in the UK food industry are working at very manual levels, they are skilled. We have factory managers, we have a large number of veterinarians working, in our industries, that are EU trained. Without those we wouldn't operate in the way that we do.

A huge discussion I think, although it's for the medium to long term, not the short term, about nutrition and health claims. And labelling, for example, if we were to do front of pack, that would mean two different sorts of labels if we wanted to export. And the protected geographical indicators, we all know that's important to us, our food culture, and we need to have that, a UK version of that, in place at point of exit.

I won’t go through these, but just to say that the environmental factor, the environmental legislation that regulates our industry and many others is extremely comprehensive and we are committed to operating under very, very similar regulation as we go forward, and the same goes for climate change and energy policy. I think this is often not discussed, but there is a huge amount of work that needs to be looked at by businesses to understand the continuity of these.

So, for us, we want to make sure we are connected and can do imports and exports, we want to be able to access high-quality ingredients and raw materials, we want to produce high quality, safe, sustainable, affordable food at all price points, we want the people to do the jobs, we want to operate and innovate
without undue regulatory burdens, but still for consumers to have confidence. And we certainly want to be connected to excellence in research and supported by accessible funding.

Thank you.

**Helen Munday's PowerPoint presentation can be downloaded from the following link:**
http://www.westminsterforumprojects.co.uk/forums/slides/Helen_Munday1.pdf

Phil Bicknell: Thanks Helen.
Supporting domestic food production and manufacturing - funding, ‘Green Brexit’ and sector priorities

Questions and comments from the floor

Phil Bicknell: A lot there from our four speakers. We’ve got a bit of time for questions so over to the floor. Put your hand up, and who you are and where you’re from again.

Dr David Hughes: I work for Syngenta in research and development, so I’m very interested in new technologies in agriculture. A number of the panellists mentioned standards and avoiding the race to the bottom, and I fully understand what they are talking about there, but my views I think diverge from that argument at some point and that is when those standards and those regulations can severely restrict or even ban new technologies which can actually improve the quality of food or reduce environmental impacts, I’m talking about things like genetic modification, for example, or neonicotinoid insecticides or what’s going on with glyphosate or the dithering around genome editing technologies which should be a complete no brainer. So some of these regulations are actually anchoring agriculture in Europe back in the 20th century and my view is that if we have access to these technologies we can do an awful lot better now in the 21st century, great thanks.

Phil Bicknell: Thoughts from the panel, Helen Ferrier do you want to take that one first?

Dr Helen Ferrier: Yes, obviously you will know this is a big area of interest and work for us as well and actually has been over many, many years, regardless of Brexit. And actually over that time the UK has been sometimes a lone voice, but a voice amongst probably quite a few within European institutions arguing for more science based and more robust decision making, and often while the actual legislation is okay, the way that it’s actually delivered by those EU institutions has been where the problem is. So obviously what we would like to see is that the UK Government, remembering how it felt when it was a member of the EU and was getting cross with those kinds of decision making processes, and actually use this opportunity to improve that as regulators on their own. But actually when you look into the details, and you will know this and other colleagues from those sectors, a lot of the issues that we’ve been dealing with have been about the UK’s implementation of EU regulations. So yes, we see there are opportunities here to make improvements if the UK is brave enough and stands by the approach that it took over many recent years.

Phil Bicknell: Lucy, what’s your take on that?

Lucy Bjorck: Well we would be in favour of some of the principles that have been established at the European level being brought back, and I’m aware that the UK Government may not be quite as enthusiastic on that, so on the precautionary principle because we do think it’s useful in making sure we have a robust assessment of environmental impacts. I do have some sympathy with the complexity that Europe has
provided in recent years with regard to making decisions, but I do think it’s really important that as we go forward what is in place is a really robust scientific testing regime that looks at new technologies in a broad sense, so to assess sustainability, if you like, in the round, to make sure that any new technologies that we do adopt don’t have detrimental effects to the environment and particularly biodiversity going forward. And my concern around that is that actually to do that properly and transparently is actually going to be quite expensive for us to do ourselves, so I hope the UK Government will be willing to find the appropriate funding so that we can do that and then that will allow us to make appropriate decisions for any new technologies coming forward.

Phil Bicknell:
Yes of course we are going to have to do impact assessments to the level that we maybe haven’t done before, and all that’s cost.

Jayne Brookman:
Can I just add on top of that, I mean I absolutely agree with Helen that we need evidence based decision making, but we also need to make sure that the implementation is clear and consistent and doesn’t end up in a situation where you’ve got two pieces of legislation that are giving the opposing viewpoint of what we should be doing.

Phil Bicknell:
Questions. Right at the back and then there’s one in the middle.

Brendan Bayley:
I work at the Treasury. We’ve heard some important points about productivity and the environment and I would just be interested in the panel’s views about whether direct payments help or hinder productivity improvements and whether they help or hinder the environment? Thank you.

Phil Bicknell:
I’m going to start with Helen again on the far side, and I’m glad I’m not sat on the panel.

Dr Helen Ferrier:
I mean it’s obviously a huge topic and the way that I set out those cornerstones of domestic agriculture policy really work through our thinking, certainly at the NFU, on this area. The volatility cornerstone, part of that is those direct payments and that actually recognises that the level of volatility that is suffered by farm businesses is really very extreme, and I think it’s something that just would not be possible to absorb in many, many other sectors. And certainly if you’re, which you will be Brendan, familiar with the total income from farming figures, you will be aware that for most sectors actually they are losing money on their agricultural production and the way that they are staying in semi-viable businesses is that support payment. Now this is not a comfortable position for the agriculture industry to be in and nobody wants to be in that position, but that’s the reality of it, based on, and I guess partly as a result of, many decades of agricultural policy. So that’s the reason we have those cornerstones, the volatility side of it is a big challenge, direct payments is one way of addressing that, and we are also talking about, which hopefully you will see when we make it public, we are also talking about a lot of other financial mechanisms that can help businesses deal with that
volatility. And then the reason they are overlapping is because if you’ve got good levels of productivity and you’ve also got some elements of capital grants and various other financial support mechanisms that encourage productivity, you are more able to ride out those huge levels of volatility. So they are very much interlocked.

Phil Bicknell:

But just think about it from... will the food industry have a perspective in terms of the productivity challenge that farmers face, because I suppose on the one hand you want to have really competitive suppliers into, as they have raw materials, but I guess there’s a risk if support is reduced, what happens to your supply base?

Helen Munday:

Yes, I mean continuity of supply is always incredibly important and there are lots of things that can interrupt that. Certainly a lot of companies will be looking right now at can they get a supply chain within the UK rather than Europe, but a lot of the things that have traditionally come from overseas have come from overseas for a very, very long time. So, yes, I mean that’s much more a consideration from the NFU side of things. In terms of productivity for us, I mean it is something around things like the Industrial Challenge Fund that we would look to get some Government support on. The view has traditionally been these are businesses, they need to invest to improve, and actually our figures on food and drink are amongst the best improvement, it’s not a sector that has lagged behind and most of that has come from investment from within those businesses. But clearly especially with some of the challenges around workforce, if there are opportunities to do things in a more robotic or digitised or whatever ways, those are things we are interested in looking at, but that will have a workforce impact too.

Phil Bicknell:

Lucy, direct payments, help or hindrance.

Lucy Bjorck:

I think that we do need to transition away from them and have those payments linked much more clearly to public goods. I think that way that producers and land managers can have certainty around what they are producing and actually that can help with the volatility because they know that they’ve got a guaranteed payment coming in, regardless of how their other businesses do.

But a couple of other points I also wanted to make, we mentioned total factor productivity in a couple of the talks today and I believe there is an OECD measure that looks at an environmentally adjusted TFP which would speak to Charles’ point about we need to be looking at the non-market products that these businesses are producing and make sure that we are looking at really in the round.

And also I would just like to mention, because I ran out of time in my talk around fairness in the supply chain, so making sure that the producers are getting a fair share of the food products to give them a more stable business and the Government has an opportunity now to extend the remit of the Groceries Code Adjudicator and to help remove some of those abuses that we are still seeing in the supply chain and give those businesses a stronger footing.
Phil Bicknell: I don’t… Brendan…

Jayne Brookman: I was going to say, I guess the other thing just to add on the innovation piece is that wouldn’t it be nice if part of that payment was given to farmers for adopting the best practice and actually getting the best practice out there more broadly, because we’re all clear that if we can get the poorest performers up to the medium, then we will solve a lot of these productivity problems.

Helen Munday: It’s in our paper.

Jayne Brookman: Thank you.

Phil Bicknell: And related to that, AHDB have got some… we’ve done some modelling work, it’s been commissioned, results of that will be coming out in mid-October and one of the scenarios that we look at is what is the impact of direct payments on farm profitability? So there is a bit of a challenge and it really kind of hits home about the impact that you would see if you were to remove levels of support overnight in 2019 and looking ahead. So that’s one to keep an eye out for, or better still go to our website, AHDB.org.uk/Brexit, and sign up and you will get it, that’s a plug from me. We had a question from the lady in the white.

Kate Lovegreen: I’m a University Student at Edinburgh. So a lot of the talks obviously mentioned the food production and manufacturers but in my research I’ve actually found very little mention of the in between people, so like auction houses, that sort of thing, I was wondering if the panel would comment on how they think that Brexit might impact these auction houses and whether they are going to have to make different amendments and stuff to what they’re doing to deal with it?

Phil Bicknell: I suppose it’s… I’m looking at Helen and Helen’s looking back at me, but I suppose from a farming perspective it’s about, what about the supply base that supplies into farmers and the whole service economy around the farming aspect.

Dr Helen Ferrier: Yes, I think this goes back to the point about it’s not just farm businesses and it’s not just producing food, that actually the farming economy is much wider than that. And all of those associated industries that feed into farming, the stuff that farmers buy, whether that’s actual inputs or whether that’s advice, or whether that’s services, the state of the farming economy will affect those associated businesses and the rural communities and families around those businesses. So it’s, you know, this is I guess why we are so interested in this area and it’s so great to be within this sector because actually it’s very real to everybody, certainly everybody that eats, which I think is probably most people. Anybody that drives along the motorway or sits on a train and looks out at the view, there’s that connection and certainly anybody that operates and lives within those rural communities will have associations with those businesses that you describe.
Phil Bicknell: I’m conscious that it’s probably something we don’t necessarily have a handle on one of the farmer board members of AHDB pulled together everybody, he wrote a cheque for over £200, invited them along for a photo, and it’s the accountant, it’s not just the free company, it’s the local garage, it’s not just the farm merchants it’s a whole range of businesses that are around in that.

Jayne Brookman: I think the other point is, is around data as well and about how that will link all the supply chain and how that maybe will help to get a fairer distribution of money across the supply chain. But I heard a statistic yesterday which is that 40% of the UK’s lorry transport is carrying food at any one time. So yes of course we are not just thinking about the farmers and the food manufacturers, but the supply chain in general.

Helen Munday: And the academic and research institutions as well, I mean I went back to my first university for an anniversary a few years back to discover my old department was gone, which was the agricultural bit and there was now molecular biology which may indicate to you where the money had come from. But, you know, if the need to improve productivity to do more research and innovation is there, perhaps that will come back.

Phil Bicknell: Well I’m an agricultural economist and there’s not too many places do agricultural economics degrees any more.
Session Chair’s closing remarks

Phil Bicknell, Market Intelligence Director, AHDB

We are pretty much out of time. It does fall to me though to just sum up with a few closing thoughts, but how do you sum up seven speakers that have covered a diversity of topics without eating too much into the coffee break?

So I thought what I would do is just share some of my take home messages and the things that I will be reflecting on, on my journey back to Warwickshire later on today.

Really triggered around kind of broadening our view of public goods, because I suppose maybe public goods we do think about it from an environmental aspect but how do we take a broader aspect of that? And I spotted something on Farmers Weekly website, Johann Tasker is sat in the front row, that talked about tree felling and a farmer being fined for loss of amenity value, the interesting aspect is how do you value amenity, but that’s the kind of discussion maybe we should be having to look at how we can take a broader scope towards public goods.

I’m conscious from some of the stuff that we heard about from Jayne that actually there’s quite a lot of support and help and advice and things that we can tap into to help us prepare for the future. The one bit at the back of my mind is maybe, are we as joined up as we can be in terms of accessing some of those areas, and have we got the laser light focus that we probably need as an industry to focus in and make a success of Brexit.

Really quite apparent to me again and again that the food chain operates across borders, not just in the UK but across wider Europe and some of our big multinational companies will be treating UK manufacturing plants as part of their European supply base. I’m not sure that is something that has been fully grasped by policymakers in terms of some of the challenges that we face.

The other aspect is that uncertainty kills investment and there’s a lot of uncertainty out there right now, and it’s not just about businesses or in the supply chain, but I suppose it also impacts on the environmental aspect, so I’m quite conscious from a farming angle, if you’re investing on farm in terms of new technology or buildings, the chances are it’s going to also deliver from the environment as well, I think there’s a win-win aspect to things like new buildings that are more efficient that have rainwater harvesting. So anything that delays investment I think is a bit of a challenge.

I think what has become apparent for me from the speakers actually this morning is that there’s a lot of different views, but also there’s an awful lot of expertise and we’ve got that scope to join up some of the policies, and probably the hard thinking now is vital to delivering some successful policy frameworks for the future.

I suppose a final point was around food prices and I think it’s the issue that probably we’ll get asked about again and again and I’m conscious I’ve left the AHDB crystal ball back in Stoneleigh so I’m not going to tell you necessarily what it will end up, but we heard some of the figures from KPMG around potential rises in food and I suppose the thing that we just need to take a bit of a reality check on is when we start to see some changes in terms of our trade policy, our agricultural policy, all of that is going to impact on costs of production, to what extent that starts to filter through to retail prices, well that’s as point for discussion because I know full well that what happens at a farm gate level isn’t necessarily reflected at what happens at that retail level.

And I’ve got one statistic that I’m going to take home, and just reminds me of the size of the challenge that lies ahead, is around regulation and legislation and 40% of it related to food. That’s a phenomenal amount of work that we all need to try and get through as an industry and part of the task that faces Government.

Just finally again, could you thank the guests and speakers for the morning’s session. Coffee break downstairs and we will see you back up here around 11.30.

Thank you all.
Session Chair’s opening remarks
Sian Edmunds, Partner, Burges Salmon

Right hello... oh gosh sorry, a bit loud. Welcome back everybody, hopefully you are all caffeine’d up and raring to go for the second part of our session.

You’ve got me in a different guise as Chair this time.

For this section we are going to be looking at the way forward for UK agri-food policy, looking at innovation, regulation and supporting sector growth, and in a strange role reversal, first up is Phil Bicknell from AHDB who is going to be talking to you in a more long and meaningful way, so I will hand over to Phil.
The way forward for UK agri-food policy - innovation, regulation and supporting sector growth
Phil Bicknell, Market Intelligence Director, AHDB

It’s stating the obvious to say Brexit is complex. At AHDB, we’ve written tens of thousands of words about Brexit over the last year that we’ve published as part of our Horizon series. Just for clarity, as a non-departmental public body, we’re not pushing for certain policy measures. Rather we’re trying to help the industry understand the challenges, be aware of our potential and understand the pitfalls. And what we’ve found as you dig into big policy areas is that even the most straightforward of things, on the surface, can prove to be pretty complicated when you’re immersed in the detail.

Brexit gives us an opportunity. An opportunity to develop a policy framework that fits UK needs, that moves on from a one size fits all approach, and ultimately helps our industry thrive. An opportunity to develop more diversity with our agri-food trade. And an opportunity to have a regulatory environment that’s appropriate. But I want to spend these few minutes sharing my own thoughts on some of the rocks that we need to overcome on the road to Brexit. I haven’t got the answers, but they’re areas we need to grasp, consider carefully, and even reset our expectations.

When I was out talking to farmers before the referendum, regulation was one of the key discussion points. There was a feeling that EU regulations were excessive. From farmers, I heard lots about science-based decision making. Neonics, pesticides, even hedge trimming windows were quoted as examples. I agree – policy should be based on evidence and not emotion.

But where does that leave us with something like hormone beef from the US, where the WTO has concluded that there isn’t the evidence to exclude hormone-treated beef from the EU? What will our approach be to that? It’s something we flagged up in our report on the WTO earlier in the summer.

Related to this, I think it’s important that regulation avoids focusing on a single issue. That can be difficult, given the loud voices and passionate influencers who are incredibly active. But as I see it there are several moving parts for regulation to get right.

Talking of regulation, the lift and shift approach that we’ll take to legislation is a clear signal of how government will deal with the rafts of European legislation in the withdrawal bill. Parts of legislation that farmers don’t like will not disappear en masse in April 2019. In the long run, it does give potential to amend and abolish regulation in some areas, and I know many farmers that will help compile a list. But it’s not a blank sheet of paper and I suspect that seeing progress in these areas could take some time.

One of the benefits of the lift and shift approach is that it could make it more straightforward to get a framework in place that facilitates trade with the EU. On Day 1, our regulatory framework will be comparable to the EUs. But over time, what happens? And I’m thinking of areas like the Veterinary Medicinal Products Directive, which is in the process of being updated. The current expected timeframe for its adoption is likely to be after the UK leaves the EU, which means the new rules will not automatically apply to the UK. The full impact of this is not fully quantifiable as the Directive is still being agreed, but it does mean that the UK will be operating under a different set of rules (the old directive) when the new Directive is adopted by the remaining EU countries. Could the UK quickly drift away from the EU in terms of equivalence on rules concerning medicine products, which could impact on our ability to trade.

Our next piece of work is on different Brexit scenarios. Without jumping the gun, it does underline the potential importance of farming policy and support to different sectors. I think our domestic agricultural policy will be a balancing act. We probably want policy to be a safety net but not to be a disincentive to the productivity challenge that I think we face. As anyone who has looked at the figures will know, we’ve seen productivity growth fall behind that of agriculture in other countries.
AHDB have obviously got a key role in closing this gap – we launched our knowledge exchange framework earlier this year. We are the major funder of applied agricultural and horticultural research and knowledge exchange (KE) in the UK and we invest about 50% of the levy we collect in this area. Whether it’s farmer to farmer learning or using a digital platform, providing the information and support to help farmers make better decisions is vital. This doesn’t apply just to technical issues, it’s also about business skills – I’m sure Allan might comment more on this later.

I’m looking forward to hearing from the other speakers and their thoughts on plotting the way forward. But the policy debate shouldn’t detract from the need for farmers to get fit for the future. We’ll get a policy and regulatory framework that we have to operate within, but that doesn’t stop us from understanding our business performance, considering different Brexit scenarios and their impact; starting to think now how to exploit the opportunities and how to address the challenges.

Thank you.

Sian Edmunds: Thanks very much Phil. Now I would like to call up Allan Wilkinson, Head of Agrifoods at HSBC.
The way forward for UK agri-food policy - innovation, regulation and supporting sector growth
Allan Wilkinson, Head of Agrifoods, HSBC

Good morning ladies and gentlemen, it’s an absolute privilege to be here and honour, and certainly a very interesting topic.

I got a text this morning from my 19 year old daughter studying Chemistry and Mandarin in Edinburgh University and she said, dad would you please tell everybody that this a moment in history and you will be judged by it, not just me, I mean probably everybody in the room. We have a number of things to look at and face and listening to the speeches that I heard this morning, I’m sorry I couldn’t join the very first ones, I stand here reflecting on what our customers are saying and what our customers are thinking about, and what commercial reality is thinking and feeling at the moment as far I see, I certainly don’t see all of the things that are going along, but certainly the whole topic of Brexit has caused, whether you are optimistic or less than optimistic about where it’s going, it has caused a degree of uncertainty, and I think for the audience that is one of the things that is probably making businesses think very carefully about what they do, how they do it and when they do it.

And I want to talk about how businesses are thinking, not just at a farm level, but also right through the food chain, and as many businesses have said to us when we sit and talk to them on a one to one basis about what they are doing, how they’re performing and what their plans are, actually reducing that uncertainty with strategic direction and dare I say strong leadership from the whole sector, not just the policymakers, is something that most businesses really do cry for at the moment.

Whether businesses are positive about being outside of Europe or not, there is no doubt about it most businesses see the change, certainly as a challenge but also as an opportunity and I want to dwell on two aspects of that.

Of course, as you’ve already heard this morning, we have the international aspect, and I just want to draw on a couple of points just to bring home the relevance of that now. One or two of you might be trying to guess how old I am, well I will tell you I’m over 50, and apparently during my time on this planet the population has doubled, some of you will know more about this than I do. In that time, not only have we had the same resources, but we’ve had to produce three times as much food to cope with the protein demand that a rise in affluence globally has demanded.

Now as we have already heard, when you start and bring into the thoughts about what’s happening globally with regard to rising population and affluence, whether you believe those forecasts or not, one stark statistic which I am often reminded about, particularly when I do travel to the Far East is that circa 60% of the population live in South East Asia at the moment and if water supply is a critical function of local food production, that geography that I’ve just described only has one third of the world’s fresh water.

So global trade of food is going to rise, it’s estimated at the moment that we only trade about 9% of food produced, forecasts suggest that will be 90% of the additional 70% of the food that we need to produce to feed the affluent demands of the rising 30% in population, mostly in those places.

So UK agriculture and food policy needs to be set so that we can harness and capture some of those opportunities that will come about. I say that because when I go and see food companies and food producers, we are highly regarded around the world and we must look after and treasure and harness some of those brands and innovations that we have. It’s often said to me that we innovate more new products annually on the supermarket shelf than the French and German equivalent industries added together.

But of course, ladies and gentlemen, as we heard earlier this morning, our exports are rising, but with a falling currency since the Referendum the cost of imports has risen, and I think one of the things we must determine
as the four points of trade, labour supply, regulation and farm support are identified and determined as we go forward, by the way ladies and gentlemen they are all linked, we must also determine how much self-sufficiency we want, and many companies are thinking, particularly in the food industry, how they source and where they source, what standards they will need to meet those requirements, and Phil has touched on that, what cost efficiencies they will have to bring about, I’m going to make some more comments on that in a minute, and therefore ladies and gentlemen, as one food company said to me yesterday, Brexit is not a cheap food policy, I really did want to say that today, it’s about making sure that we can continue to evolve what is the UK’s biggest manufacturing sector, and it’s a sector that this bank is particularly keen, not only to remain and do the same in, but actually do more in, not just for the UK domestic position, but also the increasing international trade which I’ve just mentioned.

Now what are companies doing at the moment ladies and gentlemen? As they try and prepare in this period of uncertainty, there’s no doubt about it, as we heard earlier, they are looking at how they can deliver sustainable food chains and also deliver efficiency. One or two will have heard me speak before, and there’s no doubt about it that in times of uncertainty and of also volatility, best in class mantras about delivery that is not about reducing cost at all cost, it’s about making sure that productivity is balanced with cost base; thinking about how businesses operate, thinking like an international exporter even if you have no intentions of exporting, simply because the UK market, given the amount that we import, and the demand for sophisticated food standards and products, is probably the single biggest market that most farmers and most food producers will seek to meet going forward.

We should also not be afraid of adopting best in class. I notice we have a few members on this panel from other parts of Europe and also I’m looking forward what Lockwood says about New Zealand, this is the time when we seize what is best and make the most of it.

And please, I repeat from a commercial point of view, let’s try and make sure that we reduce the level of uncertainty, at least for the short-term, because as many are starting to realise the opportunity long-term for the UK food industry is a strong and positive one.

So thank you for listening, I hope I’ve brought some commercial thoughts to your deliberations today, and I look forward to facing a few questions. The one that I fear most is the text from my daughter afterwards.

Thank you very much.

Sian Edmunds: Thanks very much Allan and now we have Dr Yuelai Lu who is Head of Secretariat, UK-China Sustainable Agriculture Innovation Network and Research Fellow at the University of East Anglia.
The way forward for UK agri-food policy - innovation, regulation and supporting sector growth
Dr Yuelai Lu, Head of Secretariat, UK-China Sustainable Agriculture Innovation Network and Research Fellow, University of East Anglia

Thank you.

Good morning, it’s a great pleasure, honour to be here to talk about UK-China co-operation on agriculture innovation and food security.

Within 10 minutes I will talk three things, one is China’s transition in agriculture and food security, and the second is the UK-China co-operation in the agri-food sector where I will briefly overview and then how can we do it better.

Before I start just a few words about this UK-China Sustainable Agriculture Innovation Network, SAIN, which was founded in 2008 by UK Government, Defra, and the Chinese Ministry of Agriculture, as a mechanism to support the collaborations between the two Ministries.

So let’s start with China’s agriculture transition and food security. This chart which I showed in several other occasions as well, gave an overview about last four decades China’s agriculture production change. So good news, agriculture production in China in last four decades increased so quickly and it’s enabled China to feed its 1.4 billion people, make China as one of the most food secure country nowadays, compared with a few decades ago. But also it’s an indicator that some products grow quicker than others, driven by income growth, urbanisation and diet change. For example, vegetable production grew much quicker than other products, as well as fruit, also increased quicker than others.

But that success was achieved with a high cost. One of the driving factors behind agriculture production in China is high input. This shows the fertiliser, of pesticides, irrigation water and plastic film for mulching influenced the increase to a great extent. That’s caused a lot of environmental problems nowadays which now become constraints to the further development of China’s agriculture. I will come back later on that.

Another point I wanted to point out and also we heard a trade just now, is that since 2004 China’s agriculture product imports surpassed the export, make China become a net import country, and so the gap between import and export continues to increase.

So recognise the constraints of environments and resource limitations and also change the diets of demands to fit this huge population, in 2015 China Government released a National Sustainable Agriculture Development Plan which aimed to transfer China’s agriculture to a high productivity, high efficiency and environmental friendly system. So to achieve that goal China needs to make progress in technology, needed to change the agriculture operation system from a very smallholder, household system to a reasonably large family farm. Also needed to increase water use efficiency and resource efficiency, particularly the fertiliser and the pesticides which caused the environmental problems a lot, so China’s target is by 2020 to realise the zero growth in fertiliser use and pesticide use.

China also released its new Food Security Strategy, the new Strategy has three key elements. The first one is to absolutely secure the food grains, that’s rice and wheat, that must be secured at the highest level. Secondly is to encourage moderated imports, it’s important in terms of trading, which includes more actively use international food markets and international agriculture resources, and also establish a global agri-food supply network. And the third component in the new Strategy is to improve land quality, it’s called storage food inland. And also improved technology which I mentioned earlier, of storage food in technology progress.

So that’s the situation of China’s the future of agriculture production and the transition in agriculture and food security.
So this transition in China’s agriculture and the Food Security Strategy which provides the opportunities really for UK and China to collaborate. But this is the current situation of the UK-China collaboration in agriculture and the food sectors. So in the last 10 years the collaboration between the two countries become more diverse and strength. In 2008, as I mentioned just earlier, Defra and Chinese Minister of Agriculture have signed an MOU to promote sustainable agriculture co-operation and SAIN network was set up as a mechanism to implement the collaboration. And just 2 years ago in January 2015 a new MOU was signed between the two Ministries to further stress the collaboration; the Newton Fund which has big pots of money allocates over £30 million to support UK-China collaboration research on agri-tech, nitrogen management and other programmes; China now is the third largest the UK food export market, just after the EU and the USA and the size of the trading is continuous growth, and we know that in 2015 the UK’s first Agriculture Consular was appointed and supported by AHDB, I believe, located in British Embassy in Beijing.

So the collaboration between the two countries really are diverse. This is just a few examples of what kind of a collaboration between the two countries, I’m not going into details of each of the categories.

With such a diverse and strong collaboration between the two countries, so the science and technical evidence really involved the world leading scientists in the two countries to challenge the wide topic of technologies, or science and technology in agriculture, but at the same time there are some weakness, I have to say, which with such diverse activities going on, there are some duplications between the initiatives and also there is inadequate involvements of the social scientists, the policymakers to translate research into policy actions and also limited enrolment in commercial sectors and we now need a proper framework really to make sure that all the initiatives can be communicated better and coordinated better.

With this background, supported by FCO Prosperity Fund and at Defra, SAIN Network are developing a UK-China knowledge sharing and a mutual learning platform to support the implementations of all the collaborating initiatives, also promote the cross discipline collaborations between all different sectors and enhance the communication and engagement among existing initiatives and the stakeholders and those will foster the new relationships, partnerships.

As a part of this platform we developed this website, we hope that this website will be a one stop shop service to provide all the information about UK-China collaborations in agricultural sector, agriculture and food sector, and in this website there is a resource centre which lists the documents, publications, project directory, organisation directory, expert directory, which will encourage those countries potential interest people to fund partnership and to promote new collaborations.

So here is the website, two websites, you can look at one, it’s the SAIN Network website, another is knowledge sharing website which provides information about the network itself and about the UK-China collaboration in agriculture.

Thank you.

Yuelai Lu’s PowerPoint presentation can be downloaded from the following link: http://www.westminsterforumprojects.co.uk/forums/slides/Yuelai_Lu1.pdf

Sian Edmunds: Thank you Dr Lu. Thanks very much for that and now we have the Rt Hon Sir Lockwood Smith, former New Zealand High Commissioner to the United Kingdom among many other things, I think.
The way forward for UK agri-food policy - innovation, regulation and supporting sector growth
Rt Hon Sir Lockwood Smith, former New Zealand High Commissioner to the United Kingdom

Sian, thank you very much.

Ladies and Gentleman, probably some of you wonder what the hell a former High Commissioner might know about agriculture and productivity, and food security. Let me just say this that my original training was as an Agricultural Scientist. Then, after you joined the EEC in 1973, I spent some years opening new markets for dairy products around Southern and Eastern Asia, and during a 29-year parliamentary career I was both Minister of Agriculture and Minister for International Trade. Through all of those years I’ve continued to be a practising beef farmer in New Zealand. And I was on the farm just three of four days ago in Northland in New Zealand.

My focus today is particularly on the issue of productivity and food security, and the environment. I’m not going to pretend to tell you what you should do, because there’s no way I should coming from New Zealand, but I want to share with you some of the experiences that we’ve had. And I’ll start with a paper I did a couple of years ago for the British Society of Animal Science that looked at the uptake of technology by farmers. The paper was about the interaction between policy, politics and science.

I broke New Zealand’s agricultural story down into four phases. Because we don’t have a natural agricultural industry, we stole it all from you and it’s pretty recent. The early establishment phase was from 1880 to 1940; then the post-Second World War phase until you joined the EEC, 1945-1970s. Then there was the Government’s subsidy period from 1970s to the mid 1980s after you joined the EEC. We thought we had to subsidise our farmers because we couldn’t expand our business up here once you had joined the EEC, and couldn’t get into other high value markets because of tariffs up to 300%. Someone talked today about 30% tariffs being high, try having a look at what the beef tariffs are trying to get into the EU. And then there was the post-reform period from the mid 1980s to today.

And what was particularly interesting were the factors that appeared to influence the uptake of technology by farmers. In that first establishment period the two key factors were problem-solving as a result of necessity, which makes sense when you’re establishing a new industry, and also political leaders with the relevant knowledge. We had two successive Prime Ministers who were livestock farmers and were heavily involved in the establishment of major research organisations in New Zealand, including our first agricultural universities. Those farmers who were Prime Ministers of New Zealand had huge influence on that.

During the second period that from the end of the Second World War through to when you joined the EEC, pursuit of economic gain was a clear factor involved in the uptake of technology. Farmers were picking up new technologies because they could get the economic gain in their pockets from doing that. And also the power of leading scientific personalities. There were some scientists that just had a profound impact in New Zealand. People like Campbell McMeekan an extraordinarily powerful personality. You know he established the Number 4 Dairy Research Unit at Ruakura in New Zealand, and had the whole thing built before he got the consents for it. I don’t think you could do it today, but that’s how effective some of these people were and they had a huge impact.

But the most powerful factor that influenced the uptake of technology by farmers in New Zealand was during the period from 1973, or the early 1970s when you joined the EEC through to 1985 when New Zealand agriculture became heavily subsidised. Those subsidies distorted the linkage between scientific developments and economic gain and I can’t overemphasise that, that any subsidies or protections break that linkage between that obvious linkage. Someone earlier today, I think it was Charles, talked about price signals being able to flow through for businesses to change to be able to respond to economic environments. During that period of subsidy in New Zealand, our productivity improvement was almost nil.
So the subsidies in New Zealand, and I’m not recommending you should do this not for one moment, were wiped just in one year in 1985. In the dairy industry this is what’s happened since. This is from 1993 to 2016, productivity in the dairy industry in New Zealand, and it’s measured in terms of kilograms of milk solids per effective hectare being farmed, has increased 62% since 1993. A lot of that is improvement in the genetic value of dairy cattle being farmed in New Zealand. Some of it is also improvement in pasture management and all that type of thing.

But look at this one, this one is quite fascinating. The sheep industry was the most heavily subsidised. That black line is our sheep numbers in New Zealand from the mid-1980s through to today. We had 70 million sheep in the days of subsidies. Today we’ve got less than 30 million. And yet the sheep meat being exported is the red line, and it’s fluctuated a bit as we get good years and bad years, but it’s remained remarkably level. This is the outcome in terms of productivity, in terms of sheep meat exported per sheep farmed in New Zealand, and the improvement since 1993 has been 161%. 161% improvement in the amount of sheep meat exported measured against the number of sheep being farmed in New Zealand. So in terms of productivity, which is one of the issues you’re looking at as you look to the future, it’s dead simple. If you want to improve productivity in agriculture in this country you’ve got to deal with the subsidies and protectionism. Otherwise you can put all the money you like into research around technological changes, but over time you’ve got to get rid of the barriers to the economic signals coming through to farmers so that they can respond to the marketplace. And protectionism and subsidies will kill that. That lesson is so obvious in New Zealand, it’s so obvious what happened during the period of protectionism.

Now, if we look at the food security angle, this is your data from Defra and the figures are consistent I think with yours Sian, this morning. Of the total food consumed in the UK, you produced 52% of it locally, and almost 30% of it, 29% of it comes from the EU. Interestingly, those of you who think you’re being swamped by New Zealand food product, 1% of the food consumed in the UK comes from New Zealand and Australia. So clearly you are not going to be self-sufficient in food, that’s obvious, and what’s more, that pattern of food supply leaves you a little bit vulnerable where well over half of the food you don’t produce yourself comes from the EU.

And this was what Defra said a few years ago itself in 2010, sourcing food from a diverse range of stable regions in addition to domestically produced food enhances food security. That message is absolutely correct today too. If you want food security, having open markets where food chains come from a whole range of stable regions of the world gives you the greatest food security, there is absolutely no question about that.

Now, some of you might say, but hang on if we open our markets, and I’ve heard it talked about today, I’ve heard people say, ah we’ve got to be careful to avoid that race to the bottom, we’ve got to make sure that we don’t see standards being compromised. I’ve heard people say the EU has the highest standards in the world. I’m not sure about that, I’m not sure chilled EU lamb could arrive in New Zealand and still have a shelf life to enable it to be marketed in New Zealand. Chilled New Zealand lamb can come all the way up here and still have a shelf life because actually our sanitary standards are higher.

Anyhow, if you look at an industry in New Zealand that was really protected back in the days of subsidies and protectionism, the wine industry is a classic story. Protected by a 40% tariff in New Zealand in the mid-1980s, that tariff was wiped in 1985 and the wine industry opened up to global competition, we get wine from all over the world. And have we seen a race to the bottom? Interestingly, no, the New Zealand wine industry from when it was protected was producing battery acid. You couldn’t export the stuff because no self-respecting person would drink it.

Today, wine is our second biggest export to the EU, our third biggest export to Australia, not a bad wine producer, and here in London we command the highest average price of any country in the world on your wine market. That’s what opening up to competition can do. In a developed country you don’t make a living out of producing cheap, low quality stuff. The effect of opening markets and competition is actually to raise
standards. And the New Zealand wine industry standards have been raised extraordinarily, I mean obviously to have the highest average price for any country in the world, here in the UK is not bad.

What about the environment, though, does the environment get damaged if you open up markets? Well, it’s really interesting. The most heavily protected and subsidised sector of New Zealand agriculture in the days of subsidies and protectionism was the sheep industry, 90% subsidies.

And I’ll just finish with this last bit. Today where we produce a similar amount of lamb from less than half the number of sheep, it’s done with 23% less land being used for sheep farming. We’ve had a million acres returned back, a million hectares forgive me, returned back to trees and some has gone back into native bush, some into forestry plantation. Another million hectares has gone into other forms of farming.

Our greenhouse gas emissions in the sheep industry have reduced 19%, 19% reduction in greenhouse gas emissions. And from turning frozen carcasses of sheep meat into fertiliser 30 years ago, today a lamb carcass is cut into 42 different major products, plus numerous bi-products, and that carcass could be marketed in over 100 countries around the world.

So that’s what opening up markets can do for the environment, all those millions of hectares gone back into growing trees and things for the environment.

So ladies and gentlemen, I just share with you that experience for what it’s worth. But I think the key thing is what someone said, again I think Charles said it this morning, that you’ve got to decide what you want. There’s no way in the world would I suggest you should do what New Zealand did. That’s just what happened when we did what we did and it is an interesting story. And as you said, Allan, a moment ago, repeating what your daughter said to you, whatever you do right at this moment don’t waste it, don’t waste it. When you joined the EEC in 1973, New Zealand had the opportunity to do things better, and we made some dumb decisions. We wasted that moment when you joined the EEC. It took us 12 years to come to our senses and make some right decisions. Don’t waste the special moment you people have.

Thanks for the chance to share some experiences with you.

Sian Edmunds:

Thank you very much for that. Now we have Professor Gerry Boyle from Ireland’s Agricultural and Food Development Authority.
The way forward for UK agri-food policy - innovation, regulation and supporting sector growth
Professor Gerry Boyle, Director, Teagasc

Thank you Chairperson.

Actually I represent an organisation called Teagasc, which is the Irish agriculture and food development authority, and is responsible for agriculture and food research extension and vocational education, but we also have a large cohort of bright young PhD students that really are the future of our industry and we work and collaborate with colleagues from all over the world.

I was really delighted to hear some of the remarks, although I disagree with a good few of them, of our previous speaker. McMeekan’s influence has stretched, as you probably know, right across the world, indeed our foremost research institute in Ireland, Moorepark Dairy Research Centre, is modelled on Ruakura and we visit there and have collaborations there quite often.

Where I would disagree, and I think it’s important, countries can grow even with a subsidy regime because it does depend on how subsidies are designed, and just to give you an example. Probably the biggest obstacle to innovation in Europe, and the dairy sector has certainly been the milk quota but happily that’s abandoned. In Ireland we plan to grow, for example, production of milk by 35% between 2015 and 2020, and that’s happening right now on our farms, and it’s happening despite, you might argue, the existence of the subsidy regime.

I would like to thank the organisers very much for having the opportunity to speak here today, I’ve attended many of these sessions and they really are an excellent vehicle and platform for policy debate, not just in the UK, but in Europe as well.

As difficult, I would argue, the impact of Brexit will be for you in the United Kingdom, I think you should spare a thought for Ireland, because the consensus in Ireland would be that we are likely to be far more severely affected if the worst case scenario emerges, than your farmers will be.

I was at the National Ploughing Championships in Ireland for the last couple of days, maybe some of you attended that event, over 300,000 farming folk will have attended by the end of today. On everyone’s lips, in every discussion I have had, and a lot of TV interviews and media interviews over the last 2 days, Brexit was the main topic of conversation. This is a real problem and I think that was mentioned earlier, this is a real issue for Irish farmers and Irish processors. Someone said the uncertainty issue is probably the biggest source of concern. We are paralysed, all of us, I’m sure it’s the same with the UK, in terms of our inability to do serious analysis because the scenarios haven’t been scoped out to any degree of certainty at this stage.

So I want to make a few remarks really on the critical importance of innovation, I think it’s the silver lining in the Brexit cloud, I think we are all forced to look more closely again at the importance of innovation in terms of driving productivity. As far as I am concerned productivity and competitiveness in the long run are one and the same thing.

I will just make a few remarks as well about institutional structures, because I do think institutions matter, particularly at a crisis time, a change in paradigm such as we are talking about.

I won’t say much about regulation, Irish farmers, I can assure you, are equally critical of the regulatory environment, but of course they do forget that most of the regulations are attached to the receipt of subsidies, they certainly like the subsidies, more of them, but the regulations that have to go hand in hand, they are less enamoured of.
Just to go back to my main point, because I do think it’s important that I underline this for an audience such as this. There would be a potentially devastating impact on the Irish agri-food sector exports if the worse possible case, the so-called hard Brexit, were to materialise, simply because of the dominance of UK trade in our exports. We are an export nation, like New Zealand, very similar in many respects, last year we exported a total value of 12 billion Euro of exports, 37% of those exports were destined for the United Kingdom in value terms, 32% for continental Europe and 31% for other countries. But when we drill down in the data in relation to exports to the UK, the situation is even more stark. About half of our beef exports by volume are destined for this market, so I’m assuming the UK consumers like Irish beef, and this is the conundrum for us, you also like Irish cheddar, 67% of our cheddar exports go to the UK. Unfortunately we, like you, love cheddar but our continental neighbours don’t like it so much, and hence we are trying to come to terms with what we are now calling the cheddar conundrum.

But there are other sectors that are so important to us as well, 70%, for example, of our forestry, our timber exports go to the UK, our horticultural exports, particularly mushrooms are hugely dependent on UK consumers, and all of the analysis that we’ve done to date, and as previous speakers have said we have done a lot, notwithstanding the uncertainty of the scenarios, and we focus on the worst possible outcome WTO tariffs and on an assumed reduction in the Common Agricultural Policy. We have concluded that the impact on our dairy and beef sectors, on our farms on the ground, would be devastating, of the order of 40% reduction in income, and that’s a permanent reduction if the worst case scenario were to materialise. Hence you can understand why all of us involved in the sector and policymakers alike, are hoping that the minimal outcome might be some form of a customs union, that those of course embrace agricultural goods.

What are the coping strategies? I won’t talk about the short-term because clearly we’ve experienced the harsh winds of Brexit so far, maybe at the category 1 level, you might say, of the storm in the form of substantial depreciation on sterling, which has been devastating to low margin exporters. But in the medium term, and this is where I would like to think there is some hope for positivism, and that’s around the importance of us, and I think we are at one with you in this respect, seeing far greater investment around productivity driven innovation, because there is really no other option, really, to combat the competitiveness shock for our agricultural sectors because of Brexit. And of course the whole point, very simple here is to enable our exporters to diversify to other markets, especially Asia.

If we are to innovate as we need to innovate, it’s going to require investment in agriculture and processing technologies, in the food sector, for example, new processing technologies will have to be brought on stream, and new product development, and one point I do want to underline here, because sometimes it’s missed in discussing this potential of innovation to offset the competition and the shock, is that it will take time to be realised. Opening up new markets as I engage regularly with processing companies, takes several years in terms of building the relationships and so on, but when you are going into new markets that demand different types of food to what we are used to, and I cite the cheddar example, I’m sure Dr Lu will verify this, it’s a big challenge selling cheese to the Chinese, but that’s what we have to think about, and we have to innovate around.

I might just briefly mention a foresight exercise that Teagasc undertook in the last year or so, and this was focused on the technologies that are going to be needed to help us innovate for the agriculture and food sector. We brought together about 200 scientists, many from the United Kingdom, from the continent, and we said look, can we form a consensus about the areas of science that we need to develop capability in, over the next number of years, and they came back amazingly, I suppose they weren’t economists, they came back with a consensus around 5 areas.

Firstly, and someone mentioned it already, the critical role of genomics and particularly gene editing in driving productivity in agriculture and food sector. The previous speaker mentioned the importance of genomics to New Zealand dairy farming, Ireland is the very same, we were the second country in the world to introduce genomic selection for dairy cows. It’s repaid 8 to 1 in terms of the investment.

The other area, and again I think many speakers referred to this, is the digital technology.
A third area that was identified in the Foresight exercise was the importance of understanding the micro
biome as it affects the human, plant and animal, and also the soil.

There is a revolution taking place in processing technologies, especially in the dairy sector, because of the
demand of consumers in sophisticated markets for technologies that are not that invasive.

And finally, and someone did also allude to this, we will experience transformations in the food value chain.

The point I want to make here is that if we wanted to build capability across this areas it will be disruptive of
the traditional profile of the sciences in the agri-food domain, so to speak, and I for one certainly hope that we
will be able to continue the scientific collaboration that has been hugely important across Europe and between
ourselves and the United Kingdom post-Brexit.

The final comment I want to make relates to the importance of the institutional structures that are in place to
guide us through Brexit. For a long time I think it is sometimes the idea of Government getting involved and
supporting industry through by way of providing a platform for dialogue has been decried to some extent.
Personally, and I would argue based on our experience in Ireland, this has been really successful actually.
When I was talking about old style planning or anything like that or target setting, we are talking about
allowing all of those involved in the industry to come together and agree a consensus on the priorities.

There will be need to identify new technologies that break into new markets, we’re, for example, looking at
what we call smart ingredient strategies around infant formula and ingredient cheese. As I said earlier we
have established, as a tier programme, Cheese for China, we’ve set up a lab in a Chinese University actually to
support Irish companies exporting into China.

But finally would say Government has a role to play and I would strongly advocate you to look at one example
of what we are doing in Ireland, we now have a group, Chaired by the Minister, who meets every 6 weeks to
discuss the innovation challenges for all of the sector, and that at least provides a focus for all of the sector to
really tackle what is, as has been said earlier, this is one of the great challenges of our age, for both our
countries and for the entire set of countries in Europe.

Thank you.

Sian Edmunds: Thank you very much Professor Boyle and now our final speaker is
Mark Buckingham, Corporate Affairs Lead at Monsanto for the UK
and Ireland.
The way forward for UK agri-food policy - innovation, regulation and supporting sector growth
Mark Buckingham, Corporate Affairs Lead UK and Ireland, Monsanto

Thank you very much. And thank you very much indeed for the opportunity to speak today.

As we’ve already heard, contemplating Brexit, the UK has an opportunity to update regulatory policy for agriculture to better support a productive, competitive and environmentally sustainable farming industry, but there is a lot to do, the policy settings we currently have for regulated technology, like crop protection chemicals and biotechnology, are not moving us in this direction.

In the six years to 2016 the number of field trials of GM crops across the EU’s 28 Member States declined by 90% to less than the number being conducted in Kenya and Uganda, Europe is making a clear choice not to lead. Globally the crop protection industry spends about four billion her per year on R&D, but the share of this investment focused on Europe has declined from 33% in the 1990s to 7% today. These changes are a direct consequence of overly precautionary regulation in a system that places hazard, rather than risk, at the centre of its decision-making and then creates uncertainty by allowing political considerations to circumvent scientific evidence.

For example, animal feeding studies of a GM trait should only be required where there is a scientific hypothesis justifying further study of that particular trait. EU rules currently require them by default and our experience has shown that that doesn’t add anything to the risk assessment of biotech products. So the EU is more determined to make it difficult to advance biotech products on the market here than it is to meet its commitment to reducing unnecessary animal experiments.

Another area is the information provided and assessed for biotech products should be proportionate to the scope of the application. At the moment the EU is expanding their quantity of agronomic and phenotypic data it requires with applications for import approval, if the crop isn’t going to be grown in Europe that information isn’t relevant for that application, so it adds cost and it adds time for the assessors at EFSA to consider it.

A fundamental problem with EU regulation is the distinction between hazard, something with the intrinsic properties to cause harm and risk, the actual probability of harm occurring. If everything was regulated according to hazard we would live without not just knives and cars, but also alcohol, detergent and electricity, life would be very different. The real world is risk-based and practical regulations should reflect this.

Some argue that we should develop regulation of agricultural products to be more like pharmaceuticals, with greater post-market monitoring. The challenge is that unlike pharmaceuticals not all agricultural interventions are regulated, expanding the scrutiny of already regulated products because that’s where the levers are may miss other farming actions like soil cultivations or crop rotation choice, which could have a greater environmental impact.

Perhaps the Agrimetric Centre set up by the Government as part of its agri-tech strategy could help in developing a framework for assessing what the real risks associated with different agricultural practices are.

So what should the UK’s priorities be? Develop and approach to regulation that protects human health and the environment while incentivising innovation, number one.

Develop an emphasis on risk rather than hazard in regulation.

A focus on a recognition of the importance of creating and supporting a commercial environment for products that ensures businesses continue to invest in research, development and manufacture, and bring R&D and products to the UK.
It’s difficult given the issues we’ve heard today, but try and achieve a stable policy environment. Agriculture is a long term business as we’ve already heard.

The UK clearly has a competitive advantage in science, combine this with an appropriate regulatory environment and the UK could be an R&D leader for global agriculture. Not so much a bread basket for the world, but a research laboratory and greenhouse for farmers in the UK and globally. Already there are examples of this model in action with many successful global partnerships between UK scientists and global farming interests.

One, for example, includes potato traits developed at the John Innes Centre being part of a collaboration with Simplot, one of the largest potato companies in North America. I’m not familiar with the details, but if that is successful there will be a flow of royalties coming back from Idaho to Norwich, which is a strong business opportunity.

And that leads me from R&D to trade. We need appropriate rules for trade even if we don’t deploy technology in the UK, our farmers can still benefit from access to that technology through trade. For example, the successful UK poultry and pig sectors underpinned by access to world markets for livestock feed. The UK imports about 2.8 million tonnes of soybean or soybean products every year with a value of about £800 million annually. Most of this soy is grown in the Americas with the benefit of GM traits that are not approved for cultivation in Europe. But without access to these feed markets our pig and poultry sectors would not be competitive.

I’ve talked about examples from pesticides in GM. However, the pace of change in technology means a post-Brexit UK does not have to grapple with these issues first. The EU is taking a long time to come to a view on how it plans to regulate novel plant breeding techniques other than GM, these deliberations to date haven’t addressed gene editing, for example. With a goal of being an R&D greenhouse to the world, the UK could take a lead in developing a proportionate, predictable and science-driven regulatory framework for gene edited crops and animals and in so doing, begin to make the UK an attractive place to conduct this research. If we move quickly we may be able to catch our commonwealth colleagues in Kenya and Uganda in numbers of field trails.

The world is very hungry for agricultural innovation, Brexit presents the UK with a clear opportunity to reform regulation on practical scientific lines and encourage investment in agricultural R&D without compromise to standards of human or environmental safety.

Thank you.

Sian Edmunds: Thank you very much.
The way forward for UK agri-food policy - innovation, regulation and supporting sector growth

Questions and comments from the floor

Sian Edmunds: There’s not enough room at the table so I’m going to stand over here and invite our speakers to come up and sit on the panel and we’ll take some questions. Thank you very much everyone for that. Do we have any questions from the floor? A gentleman there.

Dr Owen Doyle: I’m President of the Chartered Institute of Horticultural, which represents professional horticulturists and the islands of Great Britain and Ireland, so we’re at the coalface of the impact of Brexit even though it hasn’t even happened. Five companies in the Irish mushroom industry have gone out of business and Sutton Salads in Kent has also gone out of business with the loss of 260 jobs, so that’s the reality of the impact of the dramatic change in the value of sterling. The question I’d like to ask the panel is, we’ve heard words like disruption, uncertainty, higher food prices, Brexit is not a cheap food policy, a switch to environmental focus and I ask the question, is food not a public good? But the question I’d like to ask the panel is, is Brexit the latest manifestation of the shock doctrine philosophy, in other words have we created a crisis and from a capitalistic point of view, should we not miss that opportunity? So my concern is, or the question is, is Brexit the latest manifestation of the shock doctrine philosophy?

Sian Edmunds: Any takers for that one first off? Let’s have the New Zealand perspective on it.

Rt Hon Sir Lockwood Smith: As an outside observer who was here for the vote and set my alarm clock every two hours during that night to watch the result of the vote, and somebody who has been around politics a long time, I would say no it wasn’t, it’s not some great, you know, scheme to impose shock on this part of the world at all. I mean it was caused by many different reasons for many different people. But the issue for the UK now is, do you want to stay, given that the vote has been made, do you want to stay where your future is largely determined by a part of the world that’s no longer the centre of gravity of economic growth, or do you want to embrace the full world for your future? Britain has a heritage of being a major global player, that is your heritage. For the last 40 years when it comes to the critically important area of global trade strategy, which is critically important for global prosperity, the UK has been a lost voice, a lost voice. As the New Zealand Trade Minister I missed your voice in arguments at Seattle. At the battle for Seattle, I Chaired one of the main working groups there and the UK wasn’t there. And this is your opportunity to step up again and if you make the wrong decisions now and stay tied to the comfort of the customs union you won’t play that role. When I said before a lamb carcass is now cut into 42 different major cuts and marketed in over 100 countries around the world, not one of them do we have a customs union with, not even with Australia, we don’t have a customs union. There are ways today of dealing with
borders, dealing with friction in the flow of goods and services and that’s the future, that is the great prize from Brexit.

Sian Edmunds:

Professor Boyle maybe you have a different perspective on it?

Professor Gerry Boyle:

Well I’m not sure about the shock doctrine, it certainly has been a shock there’s no question about that to industry in Ireland. And again, New Zealand is a particular case, I mean I think as far as I’m concerned I can’t see how for instance, a customs union outcome would not be a very desirable strategy for the UK. I mean it seems to me it makes huge sense to try and retain as much as possible of the free trading arrangements that the UK already enjoys. From our point of view as a I said, the customs union involving agriculture and that’s a point that is often missed in the deliberations, many of the customs unions that worked actually don’t involve agriculture for, I assume, because of the complexities involved in regulation and so on.

Sian Edmunds:

Any other takers for?

Rt Hon Sir Lockwood Smith:

Look it’s really important that it’s understood you cannot have a customs union and your own global trade strategy. That is not possible under WTO rules. Neither is it possible to have a partial customs union. Under WTO rules a custom union must cover substantially all of your export products, substantially all of your export products is the language of the rules. And so while in some of these things it might be nice to have a halfway house, under international rules you can’t do that. With the WTO, and the UK has not been involved directly at the World Trade Organisation for some years, the EU has handled that stuff for you, you must get on top of these issues because in negotiating with the EU you’re negotiating with 27 other members. At the WTO, if you get it wrong, you’re negotiating with 164 members. Remember it took China 10 years to get there. I know because I was the first Trade Minister in the world so sign them up to the WTO. These issues are critically important for you, don’t screw them up.

Phil Bicknell:

It’s a complex area as well and you know we’ve looked at WTO and the implications quite a bit, but it’s really difficult to get that message through to the farming industry as well. And I think you know that that headline message of you can’t pick and choose when it comes to international trade is one to filter through. I mean the other thing that I suppose I concern myself, or concerned about from that farming angle is that you know I speak to farmers who think that Brexit is going to be a tremendous challenge for them, some think it’s going to be a great opportunity, some that think it’s going to be no change. And I think you know we’re naive to think that when we’re talking about farm policy, when we’re talking about trade policy, when we’re talking about some pretty global dynamics that there’s going to be no change. And I suppose the example I tend to cite will be what happened in Russia and the knock on impact when you see market access to different parts of market has a knock on impact, it triggered you know a downturn in terms of dairy from a European perspective. So hence, that kind of message about thinking through the implications and work through the scenarios, that’s important.
Sian Edmunds: Thank you. Any other questions? Lady here.

Tracy Worcester: From Farms not Factories. It seems to me that there is sort of two sides of the people who voted for Brexit due to the dissatisfaction of remain and that is the increased global, less regulation as we’ve heard much of today. And the other one that’s not heard of very much today is the local and how people actually wanted to have more control locally, so that we’d have less transport, so there would be less options of moving milk from over the Irish border five times, we’d have better human health, in other words in the area that I work, which is pigs, you wouldn’t have so many antibiotics given to the pigs and you certainly wouldn’t be having the pig industry here and having the antibiotic resistance effect here and the waste while the meat goes to China. You would have healthier soil, apparently we’ve got 60 more years of fertile soil in this country. The UN says that small scale farming is better for productivity, not global and the huge monocultures. We’d have money staying in the local communities and you’d have much more farm food diversity, so it would take the shocks of a global environment that we’re in at the moment. So let’s look at re-localising, how about that everybody on the table, are you all men too, wow, well?

Sian Edmunds: One woman.

Tracy Worcester: Yes, but you’re in the Chair.

Sian Edmunds: Alan, do you want to tackle that one?

Allan Wilkinson: Certainly when we talk to our customers and you know the interest in food in the UK sourcing local having a short supply chain, not only in terms of the number of players, but you know physically as well, you know that is creating great interest and great innovation and great opportunity, not only for the organisations and businesses involved, but also for the consumers. You know, we are a nation of foodies and you know I can’t see that going away. The comments I made about food trade and that, you know, they do bring some challenges and test some of the resilience. And I make them because water is not in the places where people will want the food, you know, historically so far you know even if we’ve had a number of people that have been short of food and apparently it’s still, you know, close to one billion even though the population has risen, then, you know, food trade internationally has not been so big. But I have to say that, you know, unless certain regions of the world can do things that we haven’t yet worked on and I’m thinking of science and innovation as well as clean water standards and everything else, then, you know, I’m sorry I can see a world that will need more traded product going forward, simply because we’ve got some really big populations that will need that food and they’ll want the type of food that rightly or wrongly we’ve got accustomed to. So, you know, I think both will happily and have to exist and as you know, certainly the businesses I deal with the opportunity for local food is considerable.
Sian Edmunds: Yes.

Professor Gerry Boyle: Just very briefly, I think a small enterprise can also be actively engaged in trade. I don’t think this equation between large enterprises and trade is a misconception. If I again might give Ireland as an example, we export nine-tenths of what we produce. Our farms are family run, they’re relatively small farms by world standards. I mean our average dairy farm at the moment is 76 cows, 56 hectares, that’s not a you know a multinational corporate entity. On the beef side, our average farms size is 22 cows. So we can have trade, but I think it goes back to the fundamental, why are so many of us supportive of free trade, because it’s economically efficient across the world. The freer the trade systems are, the less the barriers are, the more efficient, but also the more I would argue, the more environmentally efficient as well.

Sian Edmunds: Thank you.

Allan Wilkinson: If you don’t mind I’d just like to go back to the point about small business, some of the small businesses that we deal with are incredibly efficient. And watching small businesses evolve these days does, you know, go something like this that they start up, they get going, they start trading locally and then because they have a website the first thing and the next thing they do is trade globally. And the hardest thing they do is then trade nationally, that’s the hardest thing they do. So I just thought I would bring that in because some of the small businesses are doing some quite fantastic things from a trade point of view.

Sian Edmunds: Thank you. Any other questions? Yes, one here.

Lucy Bjorck: From RSPB.
I spoke this morning. I’m interested in the impact of free trade, you said in New Zealand it has been great for the environment, brilliant if land has been freed up, but you’ve also had terrible problems of nitrogen pollution. So environmental regulations underpinning production, wherever it takes places is so important, it’s really interesting to hear from China that you’re really starting to tackle the unsustainability problems where you’ve expanded rapidly. So free trade all very well, but we need to make sure that wherever it happens it’s done in a sustainable way. I’m interested in the discussion around WTO which seems a bit out of date perhaps. Surely WTO should be the vehicle by which as a planet we look to, to help more sustainable production systems and facilitate the trade of that. So my question to the panel is, what are the opportunities to unpick WTO rules and improve them for a more sustainable future?

Sian Edmunds: You seem to be the expert.

Rt Hon Sir Lockwood Smith: Obviously the WTO is a big organisation and therefore change is difficult. We’ve seen that since the Uruguay round of trade liberalisation, the WTO has failed to, the DOHA around has gone nowhere. I was involved in the Battle for Seattle when we tried to launch it there. But please don’t think the WTO is a past organisation
that doesn’t deliver excellent value to the world. The dispute resolution system at the WTO works brilliantly well. Someone mentioned already today that for example, the hormone treated beef issue was dealt with by the WTO and the US is compensated by the EU for the fact that there’s no scientific basis underpinning the EU’s refusal to accept growth promoting treated beef. We don’t happen to use growth promotants in New Zealand, but it’s not for scientific reasons, it’s for marketing reasons. And so that dispute resolution system is really, really important globally, as is the Sanitary and Phytosanitary Agreement, which is the agreement that sets the standards for food and for animal and plant products to be traded internationally. It’s critically important. And the WTO is still making progress, the abolition of export subsidies for agricultural products was agreed in the last couple of years, then there was the big Trade Facilitation Agreement a couple of years ago, so it’s still doing good work. And please understand that modern trade agreements invariably include, almost invariably include chapters on labour standards, environmental standards, so it’s not as if, you know it’s not as if it’s just all about the cheapest product flowing around. I agree totally with what my colleague here said that the freest possible trade does produce all sorts of benefits in terms of prosperity. But you know the WTO is not just about cutting everything, there’s serious work done on environmental standards, on labour standards that sort of thing.

Lucy Bjorck: It needs to improve on environmental standards.

Rt Hon Sir Lockwood Smith: It needs to do better, you’re absolutely right, the WTO needs to do better.

Sian Edmunds: Mark, what’s your take on it?

Mark Buckingham: I think one of the strengths of the WTO is its focus on science-based rule-making and evidence-based rules and that’s something we should expand, if anything, to better understand what are the impacts on the environment of agricultural interventions. We’ve had in Europe back to Professor Godfrey’s comments at the beginning about this competing narratives, I think part of the challenge in Europe is the politicisation of regulation of agricultural technology has been driven by which bits are regulated, which bits are in the public domain and we’ve lost sight of some of the evidence around that. If you look at neonicotinoid insecticides and the debate there, a decision was made to remove them from the market to ban them in Europe, that caused a drop in the area of oil seed rape of 10%-15% across the region. It caused much greater use of pyrethroid insecticides in August and September for winter sown oil seed rape. Those consequences of how farmers reacted to that change of a ban on neonics were not measured as part of the process and they should be, they’re almost certainly a far bigger impact on non-target insects than the neonics themselves. So out of the WTO, out of other science-driven initiatives I hope we can provide some evidence to bring some of these competing narratives closer together and maybe get some better outcomes.
Sian Edmunds: Thank you. I’m conscious we’ve only got four minutes I think before we have to wrap up, so I think we’ll call it a day there, but thank you once again to all the members of the panel for that really interesting discussion. Thank you.
Session Chair’s closing remarks
Sian Edmunds, Partner, Burges Salmon

I just have been asked to say a few words to wrap things up, so thank you all for coming along, I hope you found something useful in the discussions this morning.

We’ve heard a lot about productivity, innovation and improvements as a key feature to trying to move things forward. We’ve had some mildly heated debate about whether or not subsidies are a good thing. I will leave it to you to decide, but clearly there are opportunities that can come from removal of subsidies, whether that’s going to happen with the UK still remains to be seen.

We’ve heard about the Irish cheddar conundrum, so a different perspective on that and there are clearly concerns around the potential down sides of Brexit.

Much to dwell on and I hope you have had plenty of food for thought in the conversations today, so thanks once again.
Westminster Food & Nutrition Forum closing remarks
Matthew Bradberry, Forum Lead, Westminster Food & Nutrition Forum

Many thanks Chair. I won’t keep you all long.

Just to let you know that the transcript for today’s event, along with speaker presentations, will go out to you all within the next 10 working days. There are details in your delegate packs as to how you can have articles included in the transcript, we would ask for them to be no longer than 600 words and to be sent over in the next couple of days.

The transcript will go to everyone here today as well as a wider range of policymakers, officials and Parliamentarians with an interest in the subject matter. If you could drop your badges and any completed feedback forms on the front desk on the way out, we would be very grateful.

And finally just to echo the words of our Chair and on behalf of all of us at the Westminster Food & Nutrition Forum, including my colleague, Cerys who helped produce today’s seminar, I would like to thank all of our speakers and our Chairs today and hope you will join me in showing your appreciation.

Thank you very much.
**Comments**

**Paul Gregory**  
**Policy Advisory, All-Party Parliamentary Small Business Group**  
**Food Solutions**

**What has to be changed in Post Brexit Food Regulation?**  
In general, the good risk-based food and hygiene regulations are working well and need no change. Definitions such as PDO should be retained, as with labelling.

Items of importance arose at the meeting June 15 2017 in Brussels, attended by 5 representatives of DG SANTÉ, 1 each of EFSA, CAN, ECSLA, and Areté Consulting, and 10 Member State representatives of the UEAPME Food Forum[^1] – including the UK member, Food Solutions.

Signor Andrea Gavinelli and two colleagues from DG SANTÉ covered the new Official Controls Regulation – EU 2017/625 to be in force 14 December 2019.

**ONE BODY – OR ELSE!**  
Signor Gavinelli made it clear that the Officials Controls Regulation is complete from soil/plant to fork. The EC would only deal with one body in each MS or nation, otherwise there would be no imports, no exports with that country. Whether this is set in stone or negotiable is open to question, but the consequences of getting it wrong are immense and damaging.

This is a fundamental problem, as UK has DEFRA, Department of Health, Food Safety Scotland, Food Standards Agency and Trading Standards involved.

FSS and FSA do not have a common approach to inspection – FSS has pass or fail, FSA has the Food Hygiene Rating Scheme (FHRS) which has some consistency problems. Defra and the FSA have issued mutually contradicting guidance on allergens.

In brief, one body to regulate plant/soil to fork should result in less duplication and cost, and would be in a much better position to oversee food businesses. It should also be under ministerial control.

Obviously it is a political decision on how it is to be applied and re-organised, but all in food production and sales should be aware of the future issues, and exert pressure for the UK to comply.

(Sep 26 update – EC proposes that all Member States appoint one official to be in charge of food safety)

**CHARGES FOR INSPECTION AND REGISTRATION**  
Signor Gavinelli makes it clear that it was up to Member States to finance official controls (full or partial cost recovery, or completely paid for from central taxation) who themselves would decide the method and how much to charge.

However, he confirms fees may be reduced for low throughput enterprises, those with a good record of risk control, traditional methods or in remote locations.

Regulation EU 2017/625 Art 86 spells out what should be charged –costs of salaries of staff directly involved including administrative support, their social security costs, facilities and equipment, maintenance, consumables, training, travel and subsistence, sampling and laboratory.

Food Solutions carried out a survey on these costs above finalised in March 2017[^2] which shows 98.7% of Micro and Small Medium Enterprises (MSMEs) are opposed to charges for inspection, though only half were against registration charges. Their statements are very firm that rates and taxes are already paid.
The FSA also conducted a survey of Local Authorities (120 responses from 780 surveys sent). These were divided, and excluding responses on meat and border controls, with 52% saying there should be no exemption from inspection charges (comment from one – ‘We want the money’). 48% say there should be some exemption or no charges - and 21% of LAs are against charging at all, as charging would not work and that costs should be covered by central taxation.

The impact of charging on MSMEs would be devastating, particularly as our colleagues in Germany, Greece and Holland confirm that no charges for routine inspections are made. Clearly it is anti-competitive for the UK to impose charges already being made in some areas, and respondents say that charging will result in low-level corruption.

References

Phil Bicknell
Market Intelligence Director
AHDB

Economic impact of Brexit on farm businesses to be revealed
Detailed modelling of how farm incomes will be impacted by changes to the labour force, agricultural policy, regulation and the potential shape of future trade will be published by the Agriculture and Horticulture Development Board (AHDB) on 11 October.

The new Horizon report, Brexit scenarios: An impact assessment, reveals the potentially severe impact on the bottom line of different policy scenarios for some farming sectors.

It is the most in-depth analysis done anywhere to date on the direct effect of leaving the EU on the economic viability of individual farm businesses by agricultural sector. Examining the effects of three scenarios, from hard Brexit (World Trade Organisation (WTO) tariffs and reduced subsidies) to a softer Brexit (comprehensive Free Trade Agreement with the EU), the report covers beef, sheep, pigs, dairy, cereals, potatoes and horticulture.

Among its key findings is that changes in agricultural support will be the biggest factor in determining the viability of farm enterprises in the short- to medium-term.

It also shows how devastating WTO tariffs and reduced subsidies would be on the entire sheep sector and upland beef farmers, as well as difficulties that could be experienced in the cereals sector.

But the analysis concludes that the top 25% high-performing farms are likely to be able to weather any negative impacts of Brexit.

As a result, AHDB is challenging farmers to do more now to improve output and contain costs to get fit for the future, providing them with the tools and knowledge to achieve this.

The report will be available to download from www.ahdb.org.uk/brexit on Wednesday, 11 October. All of AHDB’s Horizon reports can be found here, providing independent evidence-based information about the impacts on agriculture and horticulture of leaving the EU, including in-depth analysis of trade prospects for agricultural commodities, farm policy in other parts of the world, availability of migrant labour, plant protection product regulation and the implication of the UK’s membership of the WTO.

AHDB is a statutory levy board, funded by farmers, growers and others in the supply chain. Its purpose is to inspire farmers, growers and industry to succeed in a rapidly-changing world. It equips the industry with easy to use, practical know-how which can be applied straight away to make better decisions and improve their performance. Established in 2008 and classified as a Non-Departmental Public Body, it supports the following industries: meat and livestock (cattle, sheep and pigs) in England; horticulture, milk and potatoes in Great Britain; and cereals and oilseeds in the UK. AHDB’s remit covers 72 per cent of total UK agricultural output.
Professor Lorna Dawson  
Sector Lead for Environment  
JHI/SEFARI

SEFARI² is carrying out work on food and drink and the Environment, particularly relevant to the current debates and conversations around Food Security. Research on ways of reducing the environmental impact of production from livestock and crops, reducing crop losses to disease, enhancing animal welfare for better on-farm performance and reduced emissions, examining the GHGe impact of diets, food waste reduction and health, crop breeding for health, reformulating food for health, food safety, examining individual access, affordability and human behaviour/food choice, are all fundamental to an evidence based understanding of Global Food Security.

New precision agriculture approaches and food technologies for improved food and animal feeds are being developed to minimise losses and improve nutrient use efficiencies. Integration of such issues as social demographics, diet and nutrition, trade, technology, conservation and climate change along with crop choice and the increasing pressures on resources such as soil and water to develop strategies to help contribute to policy and legislation development on food production and the supply chain are important to the debate. By developing ways of improving livestock health, welfare and production efficiencies, providing solutions to control infectious disease and improving food and drink through research and innovation into, for example, sources of natural products and reformulated foods, analysis of supply and demand, use of molecular level detection and diagnosis of harmful bacteria, evaluating Anti-Microbial Resistance (AMR) in the food chain and ways to mitigate risk of food-borne illness and disease. Local food is being considered from the perspective of understanding structure and effectiveness of short supply chain networks, which connect manufacturers and consumers. The sustainability of diets is important in the context of GHGe and the food and drink supply chain: by developing ways to measure and communicate healthy sustainable diets to consumers the outcome will be improved. Evidence is delivering research underpinning and unpacking the importance of healthy diets, from conditions before birth to diet across all life stages.

Through our better understanding of ways to prevent food waste, examination of supply chains, examining waste mitigation measures, and innovation in food waste while understanding household attitudes and behaviour and provide added value opportunities for waste in food and also non-food application. Food trade and consumption is helping to understand consumer attitudes and preferences regarding authenticity and origin, and assessing how consumers consider, balance and trade off different preference criteria when purchasing different food. Results have shown that there is growing preference for healthy, sustainably grown food, both by consumers and shops.

In the context of the UK, over the next 5-10 years, the areas of greatest importance for Food Security are: protection and restoration of the nation’s soils, and re-establishing the carbon, microbial biodiversity of the soils and improvements to soil structure, the delivery of clean water in aquifers and rivers resulting from farming; the delivery of clean air, including the reduction of nitrous oxide emissions from applied nitrates and the measurable reduction in carbon dioxide from mechanised and intensive systems; re-establishing the diversity and volume of biodiversity and ecosystems that make up healthy environments that are resilient; catchment management building resilience by adjusting farming systems to hold water back from flooding settlements; support and funding for research into natural systems aligned with sustainable food production and research investment into a major reduction in food waste and a new focus on diet for the health of the nation – to drive agricultural production.

These priorities cannot be seen in isolation from each other, with actions in one area possibly impacting on another. There is a real need to understand the underpinning systems and any trade-offs associated with any land management change. Landscape scale policies and practices need to be designed and implemented accordingly, to help provide the associated many public benefits, while helping achieve Food Security.
SEFARI (Scottish Environment, Food and Agriculture Research Institutes) is the collective of Moredun Research Institute, Scotland’s Rural College (SRUC), the Rowett Institute, Biomathematics and Statistics Scotland, Royal Botanic Garden Edinburgh (RBGE) and the James Hutton Institute. Much of the research carried out in these six internationally recognised organisations is funded by the Scottish Government.

Biography
Professor Lorna Dawson, BSc, PhD, is Sector Lead for Environment, SEFARI Gateway. She is a principal soil scientist at the James Hutton Institute, a Chartered Scientist and has carried out research into soil plant interactions for over 30 years and worked at the science policy interface for over 10 years.
### List of Delegates Registered for Seminar

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<td>Sian Rowlands</td>
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Contributor Biographies

Phil Bicknell, Market Intelligence Director, AHDB
Phil joined AHDB in January 2017 to head up its 50-strong team of market and data specialists providing high quality, independent analysis and insight. Phil joined from the National Farmers Union (NFU), where he was Head of Food and Farming, and formerly the NFU Chief Economist. Growing up on the family livestock farm, Phil is an agricultural economics graduate from the University of Reading and has worked in agri-economic/food roles for the British Potato Council, the US Department of Agriculture and Bidwells.

Professor Gerry Boyle, Director, Teagasc
Professor Gerry Boyle has been Director of Teagasc - Ireland’s Agriculture and Food Development Authority - with responsibility for agriculture and food research, extension and farmer education for 10 years. Teagasc’s annual budget is €180 m and it has a staff of 1200 plus 240 students undertaking doctoral research. Prior to becoming CEO of Teagasc, Professor Boyle was Head of the Economics Department at the National University of Ireland, Maynooth and during the mid 1990s he was Economic Adviser to the Irish Prime Minister. He has also served as a senior consultant with the World Bank in Eastern Europe and Central Asia. Professor Boyle is a member of the Royal Irish Academy and a recipient of the Chevalier Des Palmes Academiques from the Government of France.

Jayne Brookman, Head of AgriFood, Knowledge Transfer Network
Jayne Brookman leads the AgriFood team at the Knowledge Transfer Network, InnovateUK’s network partner, and has a broad knowledge of the AgriFood industries within the UK. Prior to joining KTN, Jayne lectured in Biotechnology at the University of Manchester before developing a number of start-ups in agriculture and life sciences. She enjoys working between the research base, government and industry to maximise the effectiveness of innovation support into the sector.

Lucy Bjorck, Senior Policy Adviser, RSPB
Lucy is a Senior Policy Officer in the RSPB’s active and wide ranging Land Use Policy Team. She leads their programme of work on Food and Farming which aims to secure a sustainable food and farming system which is good for people and good for nature. Lucy’s background is in environmental biology, she studied at Liverpool University. She has worked for the RSPB since 2001, during that time she has held various roles including Regional Policy Advocate in the north of England but is now based at RSPB HQ in Sandy. She leads on issues relating to food security and food policy seeking to ensure that the importance of nature is recognised in the development of more sustainable land use policies.

Mark Buckingham, Corporate Affairs Lead UK and Ireland, Monsanto
Mark Buckingham is a director of Monsanto’s UK business, responsible for Corporate Affairs and External Engagement for Monsanto in the UK and Ireland. Mark joined Monsanto in 1999 in the UK and later worked in a variety of corporate affairs roles at Monsanto’s Headquarters in St Louis, USA and Monsanto’s Australian business in Melbourne before returning to Europe to work in Brussels and then for our vegetable seed business in The Netherlands. Mark has a BSc in Agriculture from Reading University UK and is a 1996 Nuffield Farming Scholar. Monsanto is one of many groups with ambitious goals, helping farmers to grow enough food for a growing population, using resources more sustainably and overcoming farming challenges while delivering a return for shareowners and rewarding jobs for over 20,000 employees. We know it’s a tall order, which is why we work with farmers, consumers, universities, government agencies and nonprofit organizations around the world. Monsanto believes that bringing diverse perspectives to the table is the most effective way to develop creative and sustainable solutions to the food and farming challenges we face.

Sian Edmunds, Partner, Burges Salmon
Sian is a leading food, drink and agriculture specialist. She heads Burges Salmon’s food and drink team and provides regulatory and dispute resolution advice to all areas of the food supply chain. Her clients include food and drink manufacturers and processors, food business operatives and service providers, distributors and retailers, primary producers and co-operatives. Typical issues Sian deals with include food safety and labelling advice, food contamination, product liability and product recall, supply agreement issues and contractual
disputes, regulatory enforcement proceedings and advice on the Groceries Code. The food and drink team at Burges Salmon provides specialist advice to clients across the full range of legal services. The team provides practical, commercial advice based on their expert knowledge of food and drink law, married with a deep understanding of the dynamics of the sector. As specialists in the sector the team has a genuine appreciation of how relationships work within the industry and sector-specific trading practices. The team also understand the strengths and vulnerabilities of the supply chain and works closely with clients to advise them on regulatory and brand protection concerns.

Dr Helen Ferrier, Acting Head of Policy Services, NFU
Dr Helen Ferrier is currently acting as the NFU’s Head of Policy Services. She is responsible for a department of cross-sector policy experts who work on behalf of the NFU’s 55,000 members. Her department includes expert teams on science, regulatory affairs, environment, economics, legal affairs, climate change & renewable energy, land management and tax. In her permanent role as Chief Science and Regulatory Affairs Adviser, she leads the organisation’s policy work on agricultural science and research, and biotechnology, covering all sectors of farming. Based at NFU HQ in Warwickshire, she leads a team of policy advisers covering plant health and pesticides, farm safety, skills and training, transport, employment and better regulation. Helen is a director of the Rothamsted Research Association Board and is a member of the Institute of Food Science and Technology. Before joining the NFU in 2004, Helen was a research scientist at Imperial College London, working on probabilistic modelling of dietary exposure to pesticides. She has a background in environmental science and technology.

Professor Charles Godfray, Hope Professor and Director, Oxford Martin Programme on the Future of Food, University of Oxford
Sir Charles Godfray FRS is a population biologist with broad interests in science and the interplay of science and policy. He has spent his career at Oxford University and Imperial College and is currently Hope Professor of Entomology and Director of the Oxford Martin Programme on the Future of Food at Oxford. His research involves experimental and theoretical studies in population and community ecology, epidemiology and evolutionary biology. He is particularly interested in food security and chaired the Lead Expert Group of the UK Government Office of Science’s Foresight project on the Future of Food and Farming and is currently chair of Defra’s Science Advisory Council.

Dr Yuelai Lu, Head of Secretariat, UK-China Sustainable Agriculture Innovation Network and Research Fellow, University of East Anglia
Dr Yuelai Lu is the Head of the Secretariat of UK-China Sustainable Agriculture Innovation Network (SAIN) and a Research Fellow at University of East Anglia, UK. He is specialized in sustainable agriculture and rural development in China. He received BSc and MSc of soil conservation from Beijing Forestry University in 1982 and 1985, PhD of natural resource development from University of East Anglia in 1998. Dr Lu was a lecturer at Northwest Forestry College of China between 1985 and 1996; Research Officer at the UK Institute of Development Studies (IDS) from 1998 to 2001; Research Fellow at University of East Anglia since 2001. He has been consultant to ADB, FAO, World Bank, EU, DFID, BIS, and FCO on various projects related to sustainable agriculture and rural development in China and Africa.

Helen Munday, Chief Scientific Officer, Food and Drink Federation
Helen Munday re-joined the FDF in 2016 as Chief Scientific Officer (CSO) having worked for the trade association as Director of Food Safety and Science earlier in her career. In her role as CSO, Helen is accountable for the sustainability and the diverse food safety and science policy briefs at FDF, and also contributes to health and wellbeing policy. Helen has a wealth of experience of the food and drink industry, having previously held senior global roles in companies such as Mars and Coca-Cola. Helen has also worked as Lead Technologist in AgriFood at Innovate UK. Helen has a high level of expertise in R&D, Scientific and Regulatory Affairs as well as Product Development and Innovation across the AgriFood chain.
Rt Hon Sir Lockwood Smith, former New Zealand High Commissioner to the United Kingdom

Sir Lockwood completed his M Agr Sc (Hons) at Massey University in New Zealand, lectured there in ruminant nutrition before winning a Commonwealth Scholarship to study for his Ph.D. in animal science at the Waite Agricultural Research Institute, University of Adelaide. In the early 1980s he managed part of the then New Zealand Dairy Board’s marketing activities around southern and eastern Asia. Elected to the New Zealand Parliament in 1984, during a 29 year Parliamentary career, Sir Lockwood held the ministerial portfolios of education, tourism, deputy finance, forestry, agriculture and international trade. He was elected Speaker of New Zealand Parliament in 2008 before taking up the role of High Commissioner to the United Kingdom and Ambassador to Ireland in 2013, retiring earlier this year. He has a lifetime of farming experience and, since 1987, has continued to run his 900 acre beef farming operation in Northland, New Zealand.

Pawel Swidlicki, Brexit Analyst, Edelman

Pawel Swidlicki is a policy analyst specialising in Brexit and wider EU politics at Edelman UK. He is an expert in UK-EU relations as well as UK, German and Polish domestic politics. Previously, Pawel was at the Open Europe think tank for five years where he wrote policy papers on issues including trade, immigration, agriculture and life sciences. Pawel also contributed to Open Europe’s detailed cost/benefit analysis of the alternatives to full EU membership and how they might be achieved. Prior to joining Open Europe, Pawel worked in the client services division of Citi Private Bank in London, as well as in the House of Commons. Pawel has a Masters degree in International Relations from the University of Nottingham and a Batchelors degree in History from the University of Leicester.

Allan Wilkinson, Head of Agrifoods, HSBC

Allan, a dairy farmer’s son, was born and raised in the North East of England and has been involved with farming and the food industry throughout his career. A graduate in Agriculture from Aberystwyth University in 1985, he spent 3 years in the MMB (Milk Marketing Board) as a Farm Management Consultant before joining Midland Bank in 1988 as a Regional Agriculture Manager. Allan has held a number of roles around the UK in HSBC, including a 7 year period as Area Director and Regional Commercial Director, prior to taking up the role of Head of Agriculture in 2010. In early 2015, he was appointed Head of Agrifoods, with specific reference to lead HSBC’s sector specialism for the whole food chain in the UK and increasingly beyond. Allan is a Liveryman in the Worshipful Company of Farmers and was awarded an Associateship of the Royal Agricultural Societies in early 2013. He has been appointed as a Trustee of The Prince’s Countryside Fund, where he also chairs the industry steering group for The Prince’s Farm Resilience Programme, launched in July 2016. He is involved in a number of other initiatives, more latterly the AHDB’s Volatility Forum and as a member of the Steering Board of Farming Futures, a national group of research and education establishments linked to the food and farming industries. Allan is married to Michelle, they have two children who are in full time undergraduate education, and lives near York.

All biographies provided by speakers