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Food, the UK and the EU: Brexit or Bremain?

Tim Lang¹ and Victoria Schoen²

Summary

This Briefing Paper explores the food terrain exposed by the wider Brexit versus Bremain Referendum question to be decided by the voting UK public on June 23. It is written to raise issues; to invite academics and civil society working on food matters to consider how their work fits this momentous issue; and to aid informed decisions. The Paper follows from debates and concerns expressed at the 6th City Food Symposium on UK food and Brexit held on December 14, 2015.³

This Briefing Paper is in two parts. **Readers who are already conversant with UK and EU food policy history** and the reasons for the UK Referendum on June 23 might wish to skip or skim Part 1 where these issues are covered. This first section explains how the UK is where it is on this debate. Part 2 goes into some key issues at stake in the June 23 vote. This section is where we summarise some of the implications of leaving the EU, the so-called **Brexit option**. We also explain why we are in, and what voting to stay entails, the **Bremain option**.

The **analysis presented in this Briefing Paper** is as follows:

- **The UK is heavily dependent on other EU member states for food.** UK food production is below 60% of consumption and particularly reliant on imports for fruit and many vegetables. Supporters of Brexit have not once addressed the UK's dependency on EU producers and suppliers.
- **The UK suffers a huge food trade gap of £21bn.** Not only is the UK reliant on the rest of Europe for food but this imbalance is a drain on the national balance of payments.
- **The post-Brexit food world will be characterised by volatility, disruption and uncertainty.** Food import costs will rise if the price of sterling falls. UK exposure to world commodity prices and competition with large trade blocs would rise.
- **The Common Agricultural Policy (CAP) and the Common Fisheries Policy (CFP) are significant control mechanisms in food and both need further reform.** CAP has paid large sums to food and farm corporations and the CFP has produced waste and mismatch fishing. The CAP has pushed up land

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³ The 6th City Food Symposium 'UK, Food and Europe: implications of Brexit' was held on December 14, 2015 at City University London, organised with the Food Research Collaboration. For summaries, film and Powerpoints of the 14 talks, see: <http://foodresearch.org.uk/food-symposium-at-city-university-london/> The Centre for Food Policy and the Food Research Collaboration thank the Worshipful Company of Cooks and the Esmée Fairbairn Foundation for their financial support.

values while the CFP has put many fisherfolk out of work. But many failings have been addressed and there is a case for further improvement rather than abandonment.

- **The initial focus of the Brexit debate has been farming rather than food**, yet the UK food system employs more than six times more people outside farming. It is food that matters as well as farming.
- **The EU food system needs urgent reform and a change of direction**. If current change is too slow and vested interests are too powerful, Brexit merely adds new complications, risks and uncertainties.
- **The key questions facing the food system include sustainability, demographic change, changes in diet and supply chains and the shift to more healthy foods**. The UK and the EU food systems, whether the UK stays in or leaves, need to move rapidly in a more sustainable direction.
- **The UK, EU and global food systems face immense challenges and Brexit is a diversion**. With over 4 decades of involvement in the EU a Brexit will generate additional food system stress.
- **The case made for Brexit operates on false assumptions**. Those in favour of Brexit assume that markets and contracts, not relationships and mutual obligations, are the best way to resolve current problems. This is a false perspective. EU-wide and international collaboration is needed to improve the terms of trade.
- **Those favouring Brexit say that the EU is cumbersome and weakens political sovereignty. The case for Bremain is that the UK can put its huge negotiating weight behind promoting progressive change**.
- The **food case for Brexit** has largely been uncharted bar some thought by UKIP on farming. Politicians need to be pressed on what they would do, following Brexit. The **food case for Bremain** is that it retains existing moves to engage with the sustainability challenge with other EU Member States. Much could be also done by the UK Government on its own, such as reducing diet-related ill-health, rebuilding horticulture, and beginning to cut the diet-related carbon footprint.
- **Brexit would mean that a vast and complicated range of contracts, trade deals and systems of governance which underpin UK food would have to be renegotiated**. One possibility would be to leave the existing rules in place and then modify them slowly; but if so, why leave, when the EU is constantly a process of slow change in the first place?
- More attention is needed on how to manage the transition, should the public vote for Brexit; the **consequences of disruption** are potentially considerable.

The Briefing provides:

- a background to the Referendum and the **history of the Europeanisation of UK food policy**;
- a **summary of the food policies and processes** involved in UK membership;
- facts and figures on **where UK food comes from**, its dependencies and the large food trade gap;
- some **milestones in the UK's 43 years** of EU engagement;
- a list of UK **Government food responsibilities**;
- a list of **issues at stake** on June 24: security, governance processes, prices, health, environment, labour;
- **options for food life after Brexit**;
- encouragement to **academics and civil society** to research, question and debate this further.

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PART 1: BACKGROUND TO THE EU REFERENDUM ON THE EU

This Briefing Paper is in two parts. Readers who are already conversant with UK and EU food policy history and the reasons for the UK Referendum on June 23 might wish to skip or skim Part 1 where these issues are covered. **Part 1** explains how the UK is where it is on this debate. We summarise what the EU food system and policy is, why the UK joined and what this all means. We give the background to the Referendum and the so-called Brexit option. **Part 2** provides a list of issues at stake in the June 23 vote. This Briefing Paper follows from debates and concerns expressed at the 6th City Food Symposium on UK food and Brexit held on December 14, 2015.⁴ The Symposium raised many questions which this paper set out to address.⁵

1. Introduction

On Friday February 19, 2016, after two days of tense negotiations among the 28 European Union (EU) member states, the British Prime Minister agreed a deal on a reform package about Britain and the EU.[1] This concluded what had been a delicate, eight month British negotiation with the other 27 member states. It came as no surprise, however. It delivered on a decision taken by the British cabinet to try to chart a different course for the UK in the EU, promised in the Conservative Party election manifestos for both the 2014 European and 2015 UK elections.[2, 3] The Party has long held very strongly divergent views, but there was a consensus that this could be put to the people. The Conservative Government made it clear in its negotiations that, while it favoured staying in, it would only recommend this to voters if there was real change.

The wording of the supposedly ‘crunch’ issues of the British ‘Settlement’, as the February 19 European Council agreement is known, is important and will no doubt receive the attentions of policy and political scholars for some time. The terms and language subtly change according to location and audience. The February 2, 2016 letter from Donald Tusk, President of the European Council, to the 28 leaders of EU member states gives ‘four baskets of the proposal’ as concerning: (a) economic governance, (b) competitiveness, (c) sovereignty, and (d) social benefits and free movement.[4] For Prime Minister David Cameron, after the negotiations of February 18-19, these were made more explicit as: (a) financial protection (for the City, the pound, and to halt the domination of the Euro within EU policy), (b) European competitiveness (anti ‘red tape’), (c) restriction of access to UK welfare by intra-EU migrants, and (d) protection for the powers of the UK Parliament.[5] Although presentational emphases varied, the President and the Prime Minister said they were on the same policy ‘page’. The new Settlement was announced by the European Council as seven specific points: (a) the new Settlement itself; (b) specific issues on the banking union and further integration of the *euro*; (c) competitiveness; (d) a subsidiarity implementation mechanism and a burden reduction implementation mechanism; (e) indexation of child benefits exported to a Member State other than that where the worker resides; (f) a safeguard mechanism; (g) issues related to the abuse of the right of free movement of persons.

⁴ The 6th City Food Symposium ‘UK, Food and Europe: implications of Brexit’ was held on December 14, 2015 at City University London, organised with the Food Research Collaboration. For summaries, films and Powerpoints of the 14 talks, see: <http://foodresearch.org.uk/food-symposium-at-city-university-london/>. The Centre for Food Policy and the Food Research Collaboration thank the Worshipful Company of Cooks and the Esmée Fairbairn Foundation for their financial support.

⁵ The authors thank the academics and representatives of civil society organisations who wrote comments on earlier drafts of this paper. They include: Angela Blair, Prof Corinna Hawkes, Colin Hines, Prof Alan Matthews, Prof John Middleton, Prof Erik Millstone, Jonathon Porritt, Dr Geof Rayner, Ben Reynolds, Shaun Spiers, and some who choose to remain anonymous. We also thank the help from civil servants in Defra, ONS and other Departments for data. The content is the authors’ responsibility solely.

David Cameron concluded that the February 19 British Settlement gave sufficient change in the UK's position in the EU (requiring legal modification) for him to be able to recommend to the British people that they should vote to stay in the EU.[6] As is known, some Cabinet members and a sizeable slice of his Party's Members of Parliament chose to campaign to leave the EU, against the Prime Minister's pro-EU recommendation. On February 22, the date for the referendum was announced in Parliament as June 23 2016.

The background to this Party and Government commitment is well known and has long roots.[7] Political values within the governing Conservative Party – let alone across the country – have been severely divided for decades. In 1973 when Prime Minister Edward Heath, a Conservative, took the UK into the Common Market, the Conservative Party was mostly in favour of joining, whereas the Labour Party was not and was if anything more divided. Today, those positions are said by some commentators to be almost inverted. The split on the British Right became clear when Margaret Thatcher was Prime Minister. Known for her Eurosceptic views, it was she who actually sought and signed the 1986 Single European Act as good for business and heralding a new era of European 'harmonization'. She first appointed Lord (Arthur) Cockfield to open up Europe and then, already doubting what she had sought, seemingly punished him by withdrawing him from his Commissioner role after he had delivered.[8] Conservative Party tensions over Europe erupted fully in 1993 under Prime Minister John Major whose 7 year premiership was characterised by its EU strife.[9]

Over the years, the debate about Britain and the EU has ranged from the deeply ideological to the mundane, from the visceral to the cerebral, from Left to Right, from Atlanticist to Globalisers, from Localist to Globalist, from Nationalist to Continental, from pro-Business to pro-Consumer, and more. The UK 'In or Out' debate has been infused with many strands. What marks it out – and always has done – is the sensitivity of issues such as national identity, democracy, culture and trust. These issues are, incidentally, why the world of food becomes so important in the Brexit debate. For David Cameron, the Prime Minister, however, the immediate problem is his own Party's tension and riding out the consequences of his decision to settle the matter and the future of the UK via the Referendum. He has been quite clear about that in his statements, for example, that this is a 'once in a generation moment',[5] and that no second Referendum would be possible. This is the big movement, therefore. So how does this affect food? And how might food considerations affect it? To answer these questions, much in Part 2, we give some essential background.

2. The emergence of EU and UK food thinking

Agriculture and what is today termed 'food security' were founding planks of the European policy the UK is now to vote on. In 1957, after an experiment in 1951 with setting up a Steel and Coal Community, six countries - Germany, France, Italy, Belgium, Netherlands and Luxembourg - signed the Treaty of Rome which remains still the legal basis of what is now the EU but was then known as the Common Market.[10] Legal summaries of the terrain this Treaty has now spread into are provided by the European Commission.⁶ Back in the 1950s, food and farming were major concerns in mainstream politicians' minds. Europe had emerged from a devastating war, characterised by death and food disruption. Rationing had been common (based upon novel nutrition insights). In the UK, technically a victor, old Empire-based supply chains had been exposed as strategically vulnerable and failing to serve all its citizens well. Respected critics had prophesied that these weaknesses were already exposed in the 1930s.[11-13] Certainly, in World War 2, the UK learned fast that it needed to produce more food itself and ensure it was fairly distributed.[14, 15] It learned the cost of wasting food and taking the short-term view that cheapness is the only important goal in food policy. Security, quality, distribution and equality matter, too.[16, 17]

⁶ <http://eur-lex.europa.eu/browse/summaries.html?locale=en>

After the war, food concerns were a significant feature in planning the reconstruction: supporting farmers from booms and slumps, making more good food affordable for working people, creating new institutional structures at home, in Europe and globally, and setting up welfare systems to prevent 1930s-style hunger.[18, 19] Policy makers knew that the food system was not a hermetically sealed system; it both reflected and affected other elements in the political economy. Hunger in the 1930s had not been helped by the Wall Street Crash, the global recession and the unemployment that followed.[20, 21] In the UK, these considerations featured as it too reconstructed after the war. Enormous attention went into preventing what is now called ‘food insecurity’ globally and nationally.[21, 22] The welfare system was to provide a safety net which included the cost of a decent diet.[23] New schemes such as the NHS and school meals were developed.[24-26] Farm support and marketing schemes were expanded. The Agriculture Act 1947 was passed to give a policy infrastructure to prevent a 1930s style farm recession.[27] This, it was hoped, would prevent the UK food supply being exposed as it had been in the recent war.[28]

This kind of policy development was common across Europe and the Western world. It began to be prepared and planned even in the war.[29, 30] This is the context out of which the European Union emerged. The political intent was to put the centuries of European tension – economic, political, military – behind us. The UK was actively involved in creating this new Europe. Even then some of the tensions we see today were already apparent not just in the UK but across Europe: the politics of free trade versus managed markets, the Atlanticists versus nationalists or nascent Europeans.

3. What is the point of the EU: peace, progress and food security?

The British are right to ask: ‘what is the purpose of the EU?’ Whatever the views today, two original motives should be acknowledged: it was to build a peaceful Europe, and better mechanisms than war and economic dislocation in managing the political economy. Food was a key strand within these, fuelled by commitment to end the folly of hunger and distorted markets that had characterised the 1930s. Public health analysts had documented how poor health due was due to low income and unemployment.[31] They joined the calls to replace them through strategic and economic security, cross-border collaboration, solidarity, and the reframing of capitalism itself. The goal was peace through prosperity.

It is not sentimental to remind ourselves of these motives. The EU has been poor at rebutting anti-EU ribaldry. Its association with ‘bent bananas’, ‘food mountains’, ‘wine lakes’, etc., bring cynicism and forgetfulness. Sometimes the criticisms have been deserved: there was stupid over-production and surplus dumping in the 1980s, as Conservative MP Sir Richard Body (and others) pointed out.[32] It is no excuse to state that the EU was not alone in this practice; the USA dumped too.[33] Like any vast international engagement, the EU may lose its way at times – one can argue it currently suffers just such a loss of purpose – and it may irritate this or that faction. But we should not forget that the intent was to create peaceful collaboration rather than wars as a way of resolving conflicts over issues like food.

In some respects, the EU deserves credit for its food and farming policy; this has contributed to the food peace in the form of cheaper raw ingredients and security of supply for the urban majority. But it has also seeded great discontent such as over the dumping of surpluses in the developing world (now, if not halted, certainly notionally being addressed), the creation of cheap commodities for a food industry which over-produces possibly too cheaply,⁷ and nutritionally impoverished processed foods. It has also deliberately haemorrhaged farm employment. Dr Sicco Mansholt, architect of the CAP and its first Commissioner, understood the tendency to overproduction, and he introduced measures in the 1960s (watered down but agreed in 1972) to reduce the numbers of farmers.[34] His and the CAP’s goal was to maintain farmer incomes, not necessarily farmer numbers. This labour-shedding from the land has continued. In 2000-12, an estimated 4.8 million ‘agricultural

⁷ For food industries pursuing value-adding, such cheap commodities are a benefit, of course.

worker units' (i.e. full-time equivalents) disappeared in Europe.[35] Such policies have been created often in the name of the conventional economic goals of competitiveness and market efficiency. On the one hand, the EU has given an emphasis to consumer interests. On the other hand, it is frequently criticised as answering the needs of Big rather than Small food businesses. On one feature, there is agreement. The EU is a multi-state collaboration. Some like this. Others don't.

After the Common Market began in 1957 with its six founding member states, very quickly others wanted to join. In 1961, the UK, Denmark, Ireland and Norway requested to join what was essentially a customs union. The UK was rebuffed by France's President De Gaulle fearing that the UK would be an agent of US foreign policy interests (this was the Cold War and he wanted to preserve French military autonomy). Only when Georges Pompidou, like De Gaulle a Conservative, became French President did negotiations on the UK and others joining begin properly. The UK joined fully in 1973 and began to collaborate in the development of European food and farming policy.[36, 37] A UK election followed in 1974, won by Labour which had promised a Referendum, as the Conservatives had in 2015. This was held in 1975, with the vote to remain a resounding 67% in favour.

4. Food in EU Policy

Over the 43 years of membership, the panoply of EU policies (in which the UK has participated and which it has both helped create and implement) has become an increasingly broad framework for food. This now ranges beyond the farm gate and includes:

- The Common Fisheries Policy as well as the Common Agricultural Policy
- Intra-EU food trade regulations
- Competition policy
- Transport infrastructure support for roads, rail, waterways etc., plus regulations on issues such as wagon load capacity and driver working time
- Subsidy and common finance to fund not just farming but off-farm food activity and marketing
- Food standards on daily matters such as sizes, weights and composition
- Designation of food identification and locality
- Food safety regulations and infrastructure
- Consumer protection legislation such as food information and nutrition labelling
- Worker health and safety, and working time regulations to prevent worker exploitation
- Free movement of labour within the EU (to parallel the free movement of capital and commodities)
- Scientific and Technological Research and Development
- Rural development
- Rules for public procurement and local sourcing
- Public health advice and education
- Nutrition labelling and restrictions on health claims in food

- Environmental protection ranging from biodiversity to forestry and air quality
- Sustainable consumption and production policy development such as the recent Circular Economy communiqué
- Waste guidance and control
- Water and river quality control

Table 1 gives some key moments in the evolution of this broad conception of Food Policy at the European level. It is conventional for European histories to focus on agriculture and the CAP but this table broadens the policy net to include the large amount of work beyond the farm gate.

Table 1: Some moments in UK-EU food policy development

Date	Event	Significance
1951	European Coal & Steel arrangement	Signed in Paris by 6 founding countries. It began the process of collaboration which became forerunner of other commercial treaties, particularly the Treaty of Rome. ⁸
1957	Treaty of Rome	The founding agreement of what is now the EU. Signed by 6 countries: France, Germany, Italy and the Benelux three: Belgium, Netherlands, Luxembourg [10] Article 39 promised to “increase production by promoting technical progress.”
1958	Stresa Conference sets up the Common Agricultural Policy (CAP)	This conference explored the core thinking and mechanisms behind the CAP: security of supply, farm support, structural and price policies without distortions.[38]
1969	UK begins to join the EEC	After being rebuffed a few years earlier, the UK, Ireland and Denmark began the negotiation to join
1970	First rules for a Common Fisheries Policy (CFP)	This began to articulate fisheries policy within the CAP.
1973	UK joins the European Economic Community (EEC)	After ambivalence, the UK joins, led by PM Edward Heath.
1975	UK referendum	Promised by PM Harold Wilson. 67% of UK voters voted to stay in the EEC. ⁹
1986	Mrs Thatcher signs the Single Market legislation	The ‘1992’ process from 1987-92 created the Single Market which became operational in 1992.[39] The food industry was expected to be a major beneficiary.[40]
1992	Maastricht Treaty	This introduces the ‘subsidiarity’ principle, that decisions should be devolved to the appropriate level, a highpoint in the counter tension to perceived policy centralisation.
1992	McSharry CAP reform	This was a major reform package, ¹⁰ aiming to reduce price support. Compulsory set-aside introduced. Agri-environment support began (known as ‘Pillar 2’).
1993	Common Fisheries Policy becomes separate from CAP	The Financial Instrument for Fisheries was established as a separate EU fund.
1994	New General Agreement on Tariffs & Trade (GATT) signed at Marrakech	EU and Member States agree agriculture and food standards come under newly created World Trade Organisation and side agreements on food safety, ¹¹ plus agriculture. ¹²
1998	QUID labels	QUID = quantitative ingredient declaration. The result of

⁸ <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=URISERV:xy0022>

⁹ http://news.bbc.co.uk/onthisday/hi/dates/stories/june/6/newsid_2499000/2499297.stm

¹⁰ http://ec.europa.eu/agriculture/cap-history/1992-reform/index_en.htm

¹¹ https://www.wto.org/english/tratop_e/sps_e/spsagr_e.htm

¹² https://www.wto.org/english/docs_e/legal_e/14-ag_01_e.htm

		nearly 20 years of negotiation to provide consumers with more realistic food labels.
2000	EU Food Safety White Paper	The final response by the EU to the rolling food safety crisis in which the UK's contributions were plentiful: BSE (mad cow disease), pesticide scandals, hormone irregularities, salmonella. Introduces a risk-based management approach. Created the European Food Safety Authority to harmonise food safety.
2000	Agenda 2000	Created a comprehensive rural development package. ¹³ Rural Development is now an important part of EU/UK thinking about food infrastructure, marketing and employment.
2002	European Food Safety Authority created	Result of the realisation that, if food crosses borders, safety measures need to be improved. ¹⁴ Responsibility lies with each link in the food chain. Traceability becomes a key goal. This was useful in exposing the 2013 horsemeat fraud.[41]
2006	Regulation of Nutrition and Health Claims	This stopped misleading food claims and created a standard system of nutrient labelling, long sought by consumer and health professions and NGOs.[42]
2010	CAP Towards 2020	This document began the latest of many rounds of CAP reform. It committed the EU to move towards more sustainable but competitive agriculture. ¹⁵ The final agreement was in 2013.
2011	Roadmap to a resource-efficient Europe	Signals food as a key issue for both consumption and production which needs to have reduced impacts, notably on greenhouse gas and other environmental effects. ¹⁶
2014ff	TTIP negotiations	Present UK Government strongly supports EU preparing treaty with USA to liberalise and harmonise trade. Negotiations have been criticized as conducted largely in secret and are hotly questioned by European (including UK) and US civil society.
2015	Circular Economy package	This commits the EU to a range of improvements affecting food: waste reduction, water recycling, material and plastic reduction and reuse, marine litter reduction.[43]

Over the 43 years of membership, the panoply of EU policies (in which the UK has participated and which it has both helped create and implement) has become an increasingly broad framework for food. Critics in the Brexit debate see this development as nothing but the creation of a bloated bureaucracy, the triumph of 'Eurocrats'. In 2015, the EU population was 508 million people.¹⁷ The EU 28 member states combine as the largest economic area in the world, by value.¹⁸ In fact its bureaucracy is slight for such a vast population and economic might. The European Commission employed precisely 32,966 people in 2015.¹⁹ By comparison, the UK had 327,696 civil servants, over ten times more.[44]²⁰ Whereas Defra employs 7,600, the Directorate General (DG) Agriculture and Rural Development employs 1,000.²¹ So it is perhaps misleading to portray the Commission as a bloated bureaucracy.

Given this enormous presence of food in EU politics, as Table 1 showed, the

¹³ http://ec.europa.eu/agriculture/cap-history/agenda-2000/index_en.htm

¹⁴ <http://www.efsa.europa.eu/en/aboutefsa>

¹⁵ http://ec.europa.eu/agriculture/cap-history/post-2013/index_en.htm

¹⁶ http://ec.europa.eu/resource-efficient-europe/pdf/resource_efficient_europe_en.pdf

¹⁷ <http://ec.europa.eu/eurostat/tgm/table.do?tab=table&language=en&pcode=tps00001&tableSelection=1&footnotes=yes&labeling=labels&plugin=1>

¹⁸ See the EU statistics website: <http://ec.europa.eu/eurostat/en>

¹⁹ http://ec.europa.eu/civil_service/docs/hr_key_figures_2016.pdf

²⁰ ONS Civil Service statistics

<http://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/publicsectorpersonnel/bulletins/civilservicestatistics/2015-10-08>

²¹ http://ec.europa.eu/dgs/agriculture/index_en.htm

significance of the Brexit debate is self-evident. Strangely, in the run-up to the Cameron deal and announcement of the Referendum, there was an eerie silence about food, when the modern food system is not just a matter of farming. The UK was a cheer-leader for the Single Food Market. It has championed interests off the land more than farming. It has favoured the 'marketisation' of food policy – lowering social and public policy goals in favour of market rules – and the inclusion of big food businesses in many an EU Roundtable or policy development process. And the UK Food Manufacturing sector is largely pro the EU.²² Food Business has been guarded even since the Referendum 'gloves' came off, and many organisations are keeping neutral, arguing their membership covers a wide range of views.

The UK's own data shows how money flows through the food system. Figure 1 is from the annual Defra Agricultural statistics report which gives an overview of the UK food system using a combination of 2013 and 2014 data.[45] It shows a lengthy food supply chain with uneven distribution of work, gross value added (GVA), number of enterprises and share of where consumer expenditure goes, by sector.²³ In summary:

- 64 million consumers spent £198 bn on food in the year.
- £112 bn was in retail outlets and £86 bn in food service (i.e. eating outside the home).
- Catering is now fast catching the retail sector in gross value added (GVA). It had £26.9bn GVA in 2014 compared to retailing's £29.1bn.
- Farming's GVA was a comparatively small £9.9bn. Wholesaling had a higher GVA of £10.1 bn.
- Farming had 476,000 employees, compared to food manufacturing's 409,000, retailing's 1,184,000 and catering's 1,641,000.
- Britain, an island, employed just 6,000 employees in fishing with a GVA of just £574 m.²⁴ Most fish caught by British fishing is exported to the EU.

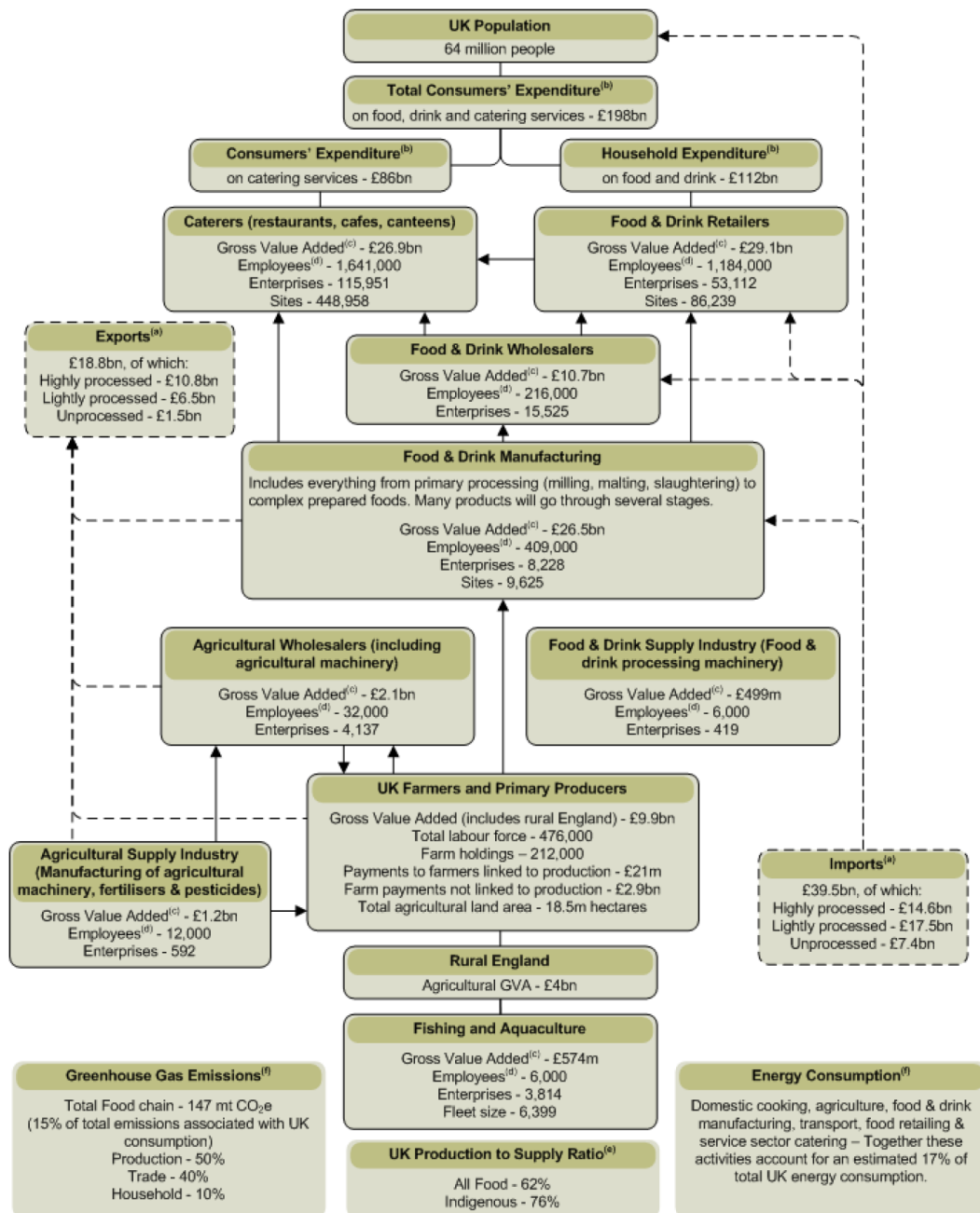
While farming still accounts for a large percentage of the EU budget, it is down from just over 70% in 1980 to 40% in 2013. The CAP budget has risen, measured at 2011 constant prices, from €20 bn in 1980 to around €55 bn by 2013 (see Figure 2) – mainly due to EU membership rising from 12 to 28 countries.[46] Agriculture actually accounts for only 1.4% of economic activity in the EU. The OECD Agricultural Monitoring and Evaluation Report confirms that EU farm support has been dramatically reduced between 1995-97 and 2012-14.[47] Only New Zealand has gone 'cold turkey'; it reduced its subsidies to nigh zero in one fell swoop in the early 1980s, winning praise from neo-liberals and mainstream economics for this dramatic ending of subsidies.[48]

²² To its credit, the Food and Drink Federation was one of the only food trade bodies which was prepared to engage in discussions about the food implications of Brexit long before Mr Cameron's British Settlement had been concluded. See speech by Ian Wright, DG of the FDG at the 6th City Food Symposium (footnote 1 earlier). The other was the National Farmers Union. <http://foodresearch.org.uk/food-symposium-at-city-university-london/>

²³ The food sector is not unusual in such uneven distribution of work, value and reward; it reflects a general shift towards development at the service 'end' of the system.

²⁴ The House of Commons Library estimate differs, stating 12,000 in employment. <http://researchbriefings.files.parliament.uk/documents/SN02788/SN02788.pdf> All agree the numbers and fish catch have dropped significantly since World War 2.

Figure 1: Economic Summary of the UK Food Chain, 2014



Source: Defra 2015 pg 91 [45]

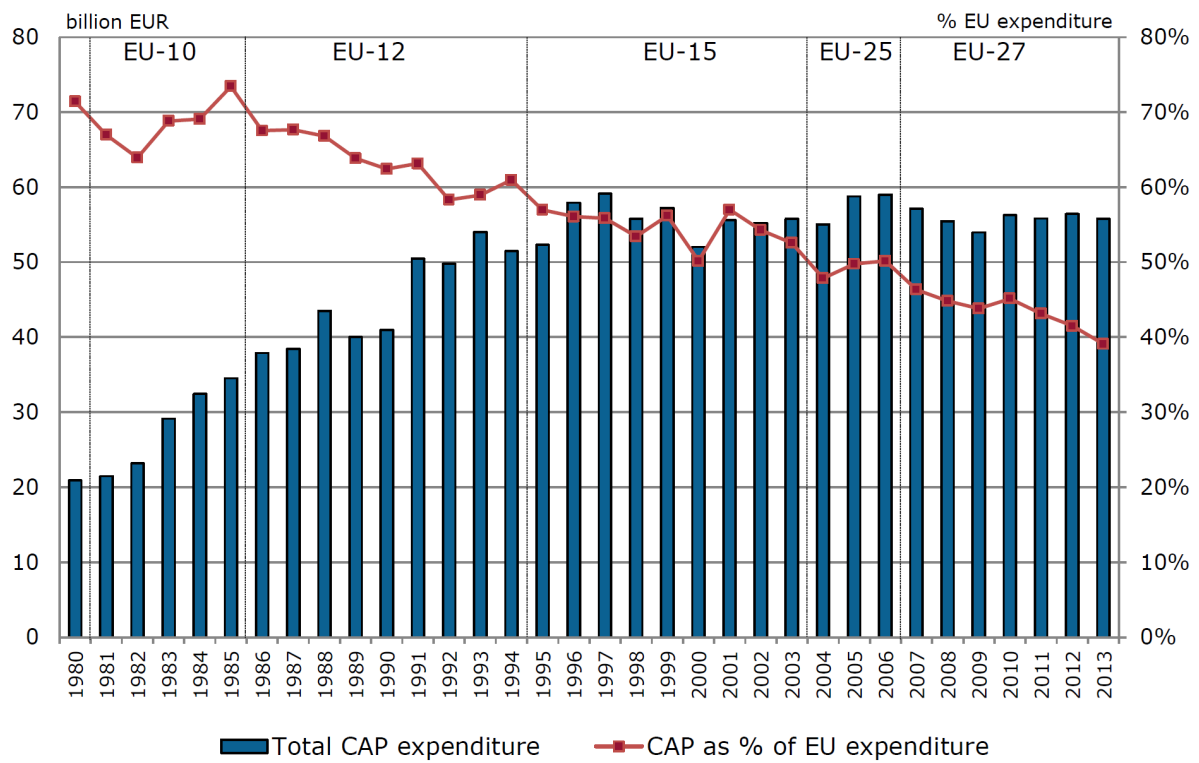
The founding European member states' goal was to prevent famines such as had disfigured the Netherlands in 1944 (which ironically created a 'natural experiment' of long-term effects on Dutch public health, still measured²⁵). It is not surprising that the Common Market founders set out to build farm support and to use land to feed people. In this it is not alone. The USA also has a long-term farm support system, the Farm Bill,²⁶ much fought over like the CAP. Today's EU has 40% of its land as agricultural. The UK has 71% of its land designated as agricultural land use but only a third of that is 'croppable'. [45] Only 164,000 hectares are used for horticulture (fruit and vegetables) out of 4,722,000 hectares down to crops. Half of

²⁵ <http://www.hongerwinter.nl/item.php?id=32&language=EN>

²⁶ <http://www.usda.gov/wps/portal/usda/usdahome?navid=farmbill>

that total cropping area grows cereals, about half of which are fed to animals – a land use now much criticised as fuelling farming’s high carbon emissions.[49] Animals are slow and poor energy converters (although they vary), and most academic thinking is that meat and dairy consumption ideally should come down, thereby giving a double ‘win’ to health and climate change targets.[50-52]

Figure 2: CAP expenditure in the EU budget (at 2011 constant prices)



Source: CAP Post 2013 (2015)

Although the drift of subsidies and benefits is downwards, the debates are by no means over. An interesting strand of work has been conducted over the last decade by independent researchers into which companies and private interests have actually benefited from EU subsidies. EU olive industry subsidies rose, for example, from €160m in 1975 to €2.3bn between 1998-2003.[53] Table 2 gives the cumulative EU subsidies received by the top 30 recipients across the period 1997-2012.²⁷ These are large sums going from consumers to and through corporate interests. In theory, all CAP market support has to be paid through processors, who then in principle pay this to their farmer suppliers. More independent research work is needed on how the money actually flows and where it ends. Defra’s system picture (Figure 1 above) suggests that, in the UK at least, powerful off-land sectors are doing rather well in this transfer. The work of the UK’s Grocery Code Adjudicator is proving useful in lifting the lid on intra-chain dynamics.[54] Our point here is that more open and accurate analyses are needed before accusing farmers of being ‘EU feather-bedded’. In reality, much money is made out of food, not much by farmers, many of whom are kept in existence by subsidies, but work long hours for low returns; they would not survive without the subsidy. The debate about what land is for ought to be central in national and international policy.²⁸ Meanwhile farm size has inexorably risen and the number of enterprises fallen across the world not just in the EU or UK. The ‘In or Out’ Referendum should be a moment when the UK debates who gets the money from the £198 bn consumers spend on food in a year, and what we want from the land.

²⁷ These are cumulative sums from 1997 to 2013, though not all entities received subsidies in all years. Some companies are listed twice, receiving subsidies in different locations. Details are viewable online, by clicking on each company name:

<http://farmsubsidy.openspending.org/EU/> [accessed March 3, 2016].

²⁸ See the Square Meal report: <http://foodresearch.org.uk/square-meal/>

If the June 23 referendum is to be a defining vote about the realities of the EU, food not just agriculture must be a debating hot-spot. The British people should not sleep-walk into something with potentially great effect on daily lives.

Table 2: EU subsidies, top 30 recipients (all countries, 1997 to 2013, in €)

	Name	Amount (all years)
1.	Varios Beneficiarios	€641,532,359
2.	Tate & Lyle Europe (031583)	€594,270,084
3.	Avebe B.A.	€433,774,989
4.	Tereos	€355,862,808
5.	Saint Louis Sucre	€287,490,301
6.	Campina Melkunie Veghel	€260,114,283
7.	Doux	€223,214,655
8.	SC Fondul De Garantare A Creditului Rural - IFN SA	€220,000,000
9.	Nestlé Nederland BV	€193,279,415
10.	Corman SA	€184,690,194
11.	Tate & Lyle Europe	€170,957,385
12.	Tiense Suikerraff. Raff. Tirlemontoise NV SA	€164,941,364
13.	Hoogwegt International BV	€161,601,809
14.	Navobi B.V.	€151,243,294
15.	Corman SA	€149,455,603
16.	Junta De Andalucia	€145,619,981
17.	Italia Zuccheri Spa	€139,754,719
18.	Krajowa Spółka Cukrowa Spółka Akcyjna	€138,806,128
19.	Tiense Suikerraff. Raff. Tirlemontoise NV SA	€137,647,553
20.	Hoogwegt International BV	€134,051,911
21.	Meadow Foods Ltd	€127,223,714
22.	Eridania Sadam Spa	€125,262,919
23.	Azucarera Ebro, S. L.	€119,445,484
24.	Nestlé Nederland BV	€118,548,842
25.	CSM Suiker B.V.	€118,406,046
26.	Cristal Union	€114,464,451
27.	Friesland Coberco Butter Products	€109,066,782
28.	F.In.A.F. First International Association Fruit Soc. Consortile A R.L.	€108,383,082
29.	Edia - Empresa De Desenvolvimento E Infra-Estruturas Do Alqueva S.A.	€103,095,249
30.	Landesumweltamt Brandenburg	€102,919,992

Source: farmsubsidy.org, 2014[55]

5. Which Ministries lead on food matters relevant to Brexit?

The Referendum is a policy action with serious consequences as well as purpose. At the time of writing, the debate has been mostly ideological, perhaps inevitably so. It deserves more detail, however. Specific questions might be posed to those responsible for different aspects of the food system which could be affected by the vote. Table 3 lists some leading Ministries / Departments of State, the name of the Cabinet member (and HM Opposition in brackets) with such responsibilities, and comments as to why this role matters for the food implications of Brexit or Bremain.

Table 3: UK Cabinet Ministries with a role on Food and Brexit

Ministry	UK Cabinet member [HM Opposition in brackets]	Relevance to Food and Brexit
Department for Environment, Food and Rural Affairs (Defra)	Liz Truss [Kerry McCarthy]	Defra has a key role in shaping policy on food and farming's production and environmental impacts. The key connection point to EU on CAP and policy developments such as Sustainable Consumption and Production (SCP), and a key delivery agency for the UK's agreement of the UN Sustainable Development Goals 2015-30.
Department of Health (DH)	Jeremy Hunt [Heidi Alexander]	DH seeks an improvement in national diet to reduce food's negative effects on public health and nutrition, and to reduce diet's burden on the NHS budget.
International Development (DfID)	Justine Greening [Diane Abbott]	DfID has a big budget and role in international policy and delivery of food aid; it is also a champion of food and nutrition security, through programmes such as Nutrition for Growth and Scaling up Nutrition. ²⁹
Energy and Climate Change (DECC)	Amber Rudd [Lisa Nandy]	DECC knows that food is a major source of climate change. The 20 th century's massive increase in food production was largely associated with oil (for fertilisers). N fertilizer is made mainly from natural gas. Consumer eating patterns are already being affected 'below the radar' by reformulation and carbon reduction but further big change is needed to meet UN and EU climate targets after the 2015 Paris Accord,[56] unless the UK tears up all such agreements following Brexit. The EU has committed to reduce GHGs by 40% on 1990 levels by 2030. This requires food change.
H M Treasury (HMT)	George Osborne [John McDonnell]	HMT is a long-term critic of CAP.[57] The long-term drop in food prices has been a key factor freeing domestic expenditure for other goods. HMT wants more cuts in CAP funding, and is concerned about world price volatility since the banking crisis of 2007-09. Yet Brexit could destabilize prices, already volatile at the international level.
Business, Innovation and Skills (BIS)	Sajid Javid [Angela Eagle]	BIS hosts the Chief Scientist and champions the science budget and R&D for which the UK is famous. UK Universities are big beneficiaries of EU R&D and science programmes. BIS also champions skills. The food sector is partly high and partly low skill. The UK food system employs 3.5 million people. Food manufacturing is now the largest manufacturing sector in the UK.[58]
Culture Media and Sport (DCMS)	John Whittingdale [Maria Eagle]	DCMS has been a key player in two hot issues in food policy: advertising and sponsorship, and physical activity.
Education (and Women) (DfE)	Nicky Morgan [Lucy Powell]	DfE has been a hot-spot of food policy activity over cooking skills and school food. In 2016, DfE ended its financial support of the School Food Plan, although it has a commitment to many aspects of delivery including Universal Infant Free School Meals.
Employment – part of the Department for Work and Pensions (DWP)	Priti Patel [Owen Smith]	DWP is responsible for employment, unemployment and youth employment. On food, it has taken a low key role. Its focus on lowering unemployment begs questions about wages: what is the balance of 'McJobs' (low pay, low skills) versus high status and well remunerated job growth? The Right wants to end the EU Working Time directive. The Living Wage Campaign wants to make every job sufficient to live sustainably.
Scotland	David Mundell [Ian Munday]	Since the Scottish Government was given more autonomy by the Labour Government, Scotland has pioneered its own policy and priorities in food policy, emphasizing sustainability.[59] Responsibility for this lies not with the Secretary of State, listed here, but the Scottish Minister, Richard Lochhead MSP. [60]
Wales	Stephen Crabb [Nia Griffiths]	Wales, like Scotland, has developed its own distinctive policy package, not least a rural and export focus.[61] It has a Welsh Food Strategy and Action Plan.[62] Like Scotland, the Welsh Government has a broadening interest in food policy.[63, 64] Rebecca Evans AM is Deputy Minister for Farming and Food.

Source: authors

²⁹ <https://www.gov.uk/government/news/nutrition-for-growth-2-years-on>

Particular attention in the mix above should surely be given to Defra. A new 25 Year Strategy has been in preparation at Defra since 2015 and is due for publication after this Briefing. Although the UK is now a devolved system of governance, the ‘English’ minister often has considerable overview, not least representation, at the EU level. Asked at the Oxford Farming Conference in January 2016 about her thoughts on the implications of a possible Brexit, Elizabeth Truss, Secretary of State at Defra said “it was not the case” that Defra officials were preparing alternatives, should the UK vote to leave the UK.[65] This was widely headlined in the press as ‘there is no Plan B’. But that official line cracked when Ms Truss’ junior Minister, George Eustice, stated on February 25 that such work is going on and that he favours a situation where “we took back control of agricultural policy”. [66]

If the people vote to leave, on June 24, what happens? We know that in some political circles, ‘planning’ is considered bad faith, yet this surely is an occasion when the British public might want its leaders to prepare for eventualities. If we vote to leave, 43 years of treaties, policy negotiations, shared frameworks, commercial ‘level playing fields’ and economic engagement will be thrown into question. If there is a Brexit, the retreat should at least be orderly. And what about the advance to replace it? Where would the UK food system be pointed?

This all matters because:

- the food system is now so finely attuned to ‘just-in-time’ systems that any disruptions could be serious. Resilience planning in the mid 2000s suggested the UK food system was food secure, if parts of it were ‘hit’.[67] But Brexit is the entire food system being affected not just one part or one Regional Distribution Centre or one company or one food line.
- UK food has become woven into intra-European food networks; we buy food produced, processed and distributed across Europe and shop in non UK-owned shops (e.g. Aldi, Lidl, Netto).
- European fresh food products now underpin UK access to fresh food; we import huge amounts of seasonal fruit and vegetables we don’t grow here. Some of these could be grown here. Why does the UK import apples or pears, for example, which could be grown sustainably here? Some fresh produce could not, e.g. pineapples or mangoes. There is a mix of changed consumer tastes but also of underinvestment and market and policy failure in UK horticulture.³⁰
- EU labour underpins much of the growth of both ‘on-farm’ as seasonal workers and ‘off-farm’ especially in food service.
- Democratic processes between EU member states have provided minimum safety standards for UK food supplies; if food crosses borders (and it has for centuries at scale), the EU provides a democratically accountable system of checks and balances to inspect and audit.
- UK food tastes have ‘europeanised’; we don’t just get fresh fruit from within Europe, our food culture has been altered, diversified and softened; we are now a café society; wine-drinking permeates all classes and most age groups; continental holidays and leisure are woven into ordinary life; celebrity chefs encourage us to drink and cook with olive oil.

To its credit, the farming sector was quick to explore the enormity of Brexit after the May 2015 election meant that a referendum was almost certain. Three Professors of Agricultural Economics, Alan Swinbank, Alan Matthews and most recently Allan Buckwell have explored possible implications.[68-70] Two papers have been written for farmer organisations, that by Prof Buckwell, and another compilation led by Prof Wyn Grant, a political scientist with a long record on the politics of CAP.[71] Both

³⁰ A paper on horticulture is to be published by the Food Research Collaboration which explores such issues.

have led to a process of rural and farmer meetings. There ought to be urban ones, too.

Work is in progress from within the environmental movement reviewing the EU's generally (though not entirely) positive role in environmental protection.[72] Environmentalists are aware that, for all its faults, the EU processes are at least fairly open, and amenable to public pressure,³¹ as happened when celebrity chef Hugh Fearnley-Whittingstall helped a pan EU civil society campaign to urge the European Commission to stop the practice of 'discarding' perfectly usable fish.[73] In three years, Common Fisheries Policy was changed.³² The Sea as both shared and national 'space' has been fiercely fought over commercially. The CFP has not been a huge success but is at last coming under some proper external scrutiny. The UK retains the second largest EU fleet. After gross overfishing for decades, there has been a long term drop in catch since the mid 20th century.[74] The UK is now a net importer of fish and has a fish trade gap of between 200,000 and 300,000 tonnes annually in recent years.[75]

The public health and civil society food movements have been somewhat slow to engage with the Referendum, partly concerned about whether the new legal constraints on lobbying might be invoked; but this is a Referendum not an election.³³ Many commercial sectors, spokespeople and pundits have also been reluctant to speak about Food and Brexit. It was partly to explore this anticipated gap that the Food Research Collaboration and the Centre for Food Policy hosted the 6th City Food Symposium in December 2015.³⁴ This Briefing Paper takes that process a stage further.

6. The current food policy challenge: sustainability or bust?

One of the unintended but positive outcomes of the banking and commodity crisis of 2007-08 was that the rich developed world had to face the fragility of its – not just the developing world's – food systems. Palpable concern spread through governmental circles used to seeing Africa or Asia as having the food problems. Rocketing oil and commodity prices generated attention on food matters not seen since the 1970s oil and famine crises. Then, as now, the reflex was to address the Malthusian conceptualisation of under-consumption, hunger and population by the simple solution of aiming to produce more food. Produce more – unleashing science and technology, coupled with more efficient market mechanisms – and problems will be resolved. This time in the 2000s, that policy formula (elsewhere termed the 'Productionist Paradigm') was clearly not adequate, although it has not stopped some from espousing it.[76]

Since the 1970s a mountain of evidence has accumulated that the food system is centrally involved in reshaping the planet, public health and how people live. Western Governments, shocked into seeing their own exposure when world food prices doubled in the banking crisis 2007-09, received a mini-avalanche of official reviews of the situation. These came from the World Bank, the UN, and individual governments.[77-81] They all summarised data on the mismatch of current food supply with demand. They did not, however, retreat simply to the old policy recipe of 'produce more'; that might be necessary but only if accompanied by radical shifts to sustainability to prevent the impact of current food trends on the economy, health, environment and social justice.[82-84] Academics and scientists point to a situation never experienced in human history. This 'new complexity' analysis is that food is associated with or a cause of or at risk from:

³¹ e.g. Friends of the Earth: <https://www.foe.co.uk/page/eu-referendum-reports>

³² <http://www.fishfight.net/story.html>

³³ A health portal has been launched: <http://healthierin.eu/>

³⁴ The 2015 City Food Symposium on UK, Food and Europe: implications of Brexit (held on December 14, 2015; see presentations: <http://foodresearch.org.uk/food-symposium-at-city-university-london/>)

- climate change and pressures on land use, in which dietary change means higher carbon diets.[52, 85]
- pressure on planetary boundaries and self-regulatory ecosystems such as the nitrogen cycle.[86, 87]
- Significant effects on ecosystems services, the ‘infrastructure’ of life itself, loss of biodiversity, rising use and misuse of potable water.[88-90]
- Massive public health problems associated with mal-consumption and excess availability of ultra-processed foods;[91, 92]
- Persistent hunger and mal-distribution, not helped by failures to invest in food infrastructure.[93]
- Mass scale use of grains for meat and dairy production on an industrial scale with health and environmental consequences.[94, 95]
- The creation of a food culture of plenty, whose expectations of untrammelled choice shape new demands, fuelled by unprecedented marketing and cultural investment; these distort children’s eating patterns.[96, 97]
- A global nutrition transition creating new patterns of disease and costs to healthcare.[98, 99]

Governments and commerce have found this new complex analysis hard to address. It means questioning the productionist paradigm. It requires inter-agency, international action. It suggests the need for multi-level food system recalibration which ought to be led by intergovernmental action. This is why one now sees conservation organisations troubled by diet – because biodiversity is being destroyed by food production.[100] And why health analysts see the urgent case for protecting ecosystems – because trends damaging health also affect the capacity of earth systems to operate within safe boundaries.[89] And why so much of the food industry is now concerned about climate change. It needs a new level playing field.

The EU has begun to engage with some of this, sometimes falteringly, held back by reluctance to intervene firmly, and by conventional belief in minimal government. This hesitancy was exhibited when a long negotiated and anticipated Sustainable Food Communiqué awaiting formal acceptance was dropped by the incoming Commission in summer 2014 – in the name of jobs and growth, as though those are unconnected with sustainability and health! Yet the EU’s own Joint Research Centre (JRC) has been a source of clear evidence suggesting the need for major dietary change, with estimates that food accounts for around a third of the average European’s impact on climate change.[101, 102] UK governments, too, have long received strong recommendations from its own advisors to begin to shift the food system, and not just appeal to consumers to ‘do the right thing’.[103, 104]

This is the ‘big picture’ that the UK, like all rich societies, needs to address. The 2015 Paris Climate Change Accord and the signing of the UN Sustainable Development Goals both suggest that the present Government is aware of how pressing this is. Food sits at the centre of this case for change. This is what our politicians and policy makers ought to focus on. This is what the EU vote and its ramifications on policy mechanism will shape.

7. Conclusions to Part 1

1. EU role in food has been developing since 1957 with the UK joining in 1973. 43 years of interaction and working together on food matters is at stake if the UK votes to leave.
2. The UK Food System is more than just farming; it is now a highly complex off-farm system which is closely woven into continental (and therefore EU) structures. Most money, employment and value adding occurs off the land.
3. The pressing food policy agenda is how to make the entire Food System more sustainable, and to begin that process rapidly. Whether in or out, we need to shift the UK towards dietary health, to reduce the UK food system's carbon footprint, and to prevent the massive externalised health costs associated with poor diet. Food can and should be a positive feature of UK culture not a major source of damage to eco-systems, lives and health.
4. Unless the UK chose an autarkic policy position – feeding itself solely from within its own borders – some inter-governmental and inter-corporate food relations and structures are inevitable. This is what the EU has developed.
5. If the UK votes for Brexit, urgent thought needs to be given to the question: replaced by what? How? By and with whom?

It is to the latter questions we now turn.

8. What happens on June 24?

This section now considers some features of the food policy landscape which are at stake in the Referendum. When UK citizens vote on 23 June for Britain to remain in the EU (Bremain) or to leave (Brexit), the food policy direction will be determined.

8.1 At stake 1: A framework of policies and processes

Simply put, since 1973, and particularly since the Single Market and '1992' process introduced under Mrs Thatcher, the UK's food system has become inextricably entwined with other EU member states. To unravel this would be complex and take time. Article 50 of the Treaty on the European Union would have to be invoked; this is the agreed formal process.[105] Current prognoses suggest this process would take at the minimum two years but probably, in the case of food, far longer. The modern world of food is not just a matter of formal legal standards and regulations but of a vast parallel system of commercial ones. This dual system of food governance – much analysed by academics[106] – would be changed by the significant alterations and uncertainties for the formal legal system that would follow from a governmental withdrawal from the EU.

Membership of the EU has meant participation in the development of what is now a complex web of processes of decision-making. The style is of compromise, which is why the EU was given the Nobel Peace Prize in 2012 for "the advancement of *peace* and reconciliation, democracy and human rights in Europe".[107] Behind and before every high profile, late night ministerial meeting, is an often long slog of consultation and preparation involving civil servants, policy-makers, industry, consumers and evidence providers. A vast array of agreements, policies and standards now underpin UK food. Labels are in EU formats. This did not just happen. It was negotiated. Nutrition labelling didn't just spontaneously appear; it took the consumer and public health movements nearly 20 years of lobbying, researching, trialling and educating to achieve what we now have; and it is constantly tussled over. This vast array of agreements is hard for UK or any voters to see. It's the reality we accept as, well, 'reality'! In formal EU language, this is known as the *acquis communautaire*. This is what any new applicant to the EU has to negotiate and re-engineer into its food and wider political economy. This is what Brexit would leave.

The *acquis* is the compilation or accumulation over time of legislation and court decisions which make up the body of European Union law.[108] Table 4 gives the chapter headings of the current *acquis*. This is what any state accedes to when joining the EU, and what the UK leaves if it votes Brexit. One way forward would be to retain the *acquis* and whittle away what was not desired over time.³⁵ This sounds attractive but the problem is that at the same time, on the wider scale, a process of negotiation would begin affecting the parallel system of commercial governance. It would be necessary to differentiate between laws setting the relationship between member states, such as free movement and public procurement, and EU directives that have been transposed into UK law, such as most of the environmental, consumer protection and health regulations in chapters 27 and 28 (see Table 4). Whether the UK chooses to keep, for example the Special Protection Areas or regulations on water quality, could be up to the Government. This anticipates a huge amount of time and energy given to such discussions. It means revisiting 43 years of what has already been decided in a kind of food policy groundhog day. This negotiation and sifting would have to reshape or reaffirm the legal basis of internal, trade and external frameworks.

³⁵ At the June 2014 AGM of the Campaign to Protect Rural England, Nigel Farage MEP, leader of the UK Independence Party, was asked what would happen if the UK left the EU. His answer was to leave it all in place and then over time decide what to keep, what to enhance and what to dump.

Chapters 11, 12 and 13 are most obviously those of concern to food policy, but so is Energy, chapter 15, and Enterprise and Industry, chapter 20, and Competition policy, chapter 8, and then one realises that most concern food, not just 11-13, not least the first two. If there wasn't freedom of movement for workers, there would be far fewer pickers of fresh fruit and vegetables on British farms, or workers in the cafés and hotels where employment has rocketed and now underpins the massive food service economy, noted in the discussion of Figure 1, above. Some food sectors are critically exposed with regard to labour, such as fresh food and vegetables, but also catering and food manufacturing (to which we return below). Partly these sectors have come to rely on intra-EU labour and partly, this pattern is being undermined by cheaper labour from outside EU. This is the basis for critics of the EU arguing that restrictions on migrant labour, wherever it comes from, would lead to more employment of UK labourers and their room to demand higher wages. This in turn might have knock-on effects on higher food prices for consumers. All this warrants calculation and exploration. Our point here, however, is that the apparently simple matter of leaving the *acquis* – whether in a 'big bang' after the two years insisted by Article 50 or slowly (the Farage option?) – is not that simple. The food system would unsurprisingly be affected by the systemic nature of the change!

Table 4: 2013 EU *acquis* (body of law) which the UK applies

Chapter 1:	Free movement of goods
Chapter 2:	Freedom of movement for workers
Chapter 3:	Right of establishment and freedom to provide services
Chapter 4:	Free movement of capital
Chapter 5:	Public procurement
Chapter 6:	Company law
Chapter 7:	Intellectual property law
Chapter 8:	Competition policy
Chapter 9:	Financial services
Chapter 10:	Information society and media
Chapter 11:	Agriculture and rural development
Chapter 12:	Food safety, veterinary and phytosanitary policy
Chapter 13:	Fisheries
Chapter 14:	Transport policy
Chapter 15:	Energy
Chapter 16:	Taxation
Chapter 17:	Economic and monetary policy
Chapter 18:	Statistics
Chapter 19:	Social policy and employment
Chapter 20:	Enterprise and industrial policy
Chapter 21:	Trans-European networks
Chapter 22:	Regional policy and coordination of structural instruments
Chapter 23:	Judiciary and fundamental rights
Chapter 24:	Justice, freedom and security
Chapter 25:	Science and research
Chapter 26:	Education and culture
Chapter 27:	Environment
Chapter 28:	Consumer and health protection
Chapter 29:	Customs union
Chapter 30:	External relations
Chapter 31:	Foreign, security and defence policy
Chapter 32:	Financial control
Chapter 33:	Financial and budgetary provisions
Chapter 34:	Institutions
Chapter 35:	Other issues

Source: European Commission[108]

8.2 At stake 2: Options for the relationship on June 24 after the vote

One irony, given that part of the Brexit rhetoric concerns a perceived excessive Eurocracy (a myth questioned above), is that Brexit would actually require a huge new civil service input or, if not civil servants, it would require expensive consultants operating as quasi civil servants, promising rich pickings for consultancy businesses.³⁶

The UK would have to renegotiate an estimated 12,295 EU regulations which have direct effect across the economy, some of which concern the food system.³⁷ Residency agreements for the 3 million EU citizens currently in the UK would be needed, and security for the 1.8 British passport holders living or working across the other 27 EU Member States would need to be established. Deals with about 50 countries would have to be renegotiated. The UK has not negotiated its own trade deals since beginning to join the EU back in 1969. Outstanding debts or promises would have to be paid such as the 2017-20 budget contribution of around £26bn.

This process would not be quick, unless the Government chose to do a dramatic 'Big Bang' with the threats and dislocation that would follow. This would be administratively uncharted waters, and as Lord Turnbull, former head of the UK Civil Service, has said would be "absolutely all consuming" and a job which would be "vast". [109] This is a British understatement.

Which model of 'out' would the UK adopt? A number have been proposed by analysts so far. Table 5 gives some options. Breain is in the Table for comparative purposes. These draw on the few documents in the public arena so far, advice from interviews, and the two recent HM Government papers from the Cabinet Office and the Foreign & Commonwealth office.[68-71, 110]

One option is a customs union. The UK withdraws from the EU, but remains within the customs union. Goods from within the customs union can move freely, including British farm exports, as can those from outside once a Common External Tariff (CET) has been paid. However, it does not differ much from EU membership and might be unacceptable to opponents of membership. It might, indeed, be unacceptable to the EU. Some early warnings have already been expressed, but such statements may just be part of the 'smoke and mirrors' of politics.[111]

The 'Norwegian' solution would be one in which the UK joined the European Economic Area (EEA).³⁸ This is the formal structure which unites the EU with three small countries – Iceland, Liechtenstein and Norway - outside in what is left of the European Free Trade Area (EFTA) that had grown when the EU was taking shape in the 1960s. The CAP regime as such is not included in the EEA, so there would be scope for a domestic policy. However, more generally, it involves accepting EU regulations while having little or no influence on them. Norway has independence but has to abide by decisions, either with it silent in the policy room or left outside when matters become delicate.

The 'Switzerland' option would be to be in European Free Trade Area (EFTA) but not the EEA. It has a series of bilateral treaties with the EU negotiated on a case-by-case basis. The difficulty as with the Norwegian solution is that a considerable body of EU law has to be accepted without the ability to shape it.

A simple free trade agreement (FTA) with the EU, another option, might be the UK's preferred route. How difficult it would be to achieve remains to be seen; both sides

³⁶ Former civil servants 'let go' in the shrinking of the State since 2010 already sense some opportunities whether in the state or within consultancies.

³⁷ Many of these regulations are already 'nationalised' i.e. they have been put into UK law. So in fact, much Parliamentary time might have to be spent on 'de-nationalising' EU-derived laws in order to create new national ones. This is where the relationship with Wales and Scotland might become of some significance.

³⁸ For the formal structures, see: <http://www.efta.int/eea>

would clearly be interested. But would it cover services as well as goods? It might be difficult to negotiate if either side starts to lay down red lines. Would the EU try to limit market access for the City, for example? If an agreement cannot be reached on a FTA, then the default option is for the UK and EU to trade with each other within the WTO system. This 'going global solo' might be damaging to UK farmers in terms of tariff barriers in Europe and free access of imports. This gets to the heart of the matter. Given that the UK imports twice as much food as it exports (see below), the Brexit argument that the UK would not face tariff barriers would be quickly tested. Here is also where corporate supply chains and contracts might be affected. In all sorts of ways, UK food trade might be disadvantaged. This might, of course, be an incentive for the UK to invest massively in rebuilding key sectors for health such as horticulture. But there is little sign of that to date.

If the UK votes to stay in, this would not be a recipe for stasis but for continued participation in the evolution of EU policies and processes. As was summarised at the end of Part 1 of this paper, most academics and scientists working on food matters are concerned about the urgent need to tackle major challenges facing the food system at local, national, EU and global levels. These issues are, in some respects, already emerging onto the EU agenda – climate change, energy, obesity, social dislocation, sustainability - but at a frustratingly slow pace. The risk in leaving is that these issues can then only be tackled at the local or national level with the global arena left to the same frustratingly slow pace of change – or worse, delays and lack of leverage.

Table 5: Options for framework of relationship with the EU post Brexit

Model		What it means	Comment
BREXIT: LEAVE EU	Do a 'Norway'	Be a member of the European Economic Area, countries outside the EU but almost entirely working to the 'rules' of the EU	This is virtual EU membership without the participation. Norway controls its own farming and fishing sectors. It can negotiate trade deals but only subject to what doesn't affect its EU trade
	Do a 'Switzerland'	Have a formally negotiated bilateral agreement with the EU	This model is already in difficulty. It might be hard to sell to the British business but the public might like UK courts having primacy
	Customs Union	Emulate Turkey, with full access for goods but not agricultural products or services	Turkey very much wants to join the EU. It currently has tariff free access to EU for goods but not for agriculture, services and public procurement
	WTO only	Trade only on a basis set by the World Trade Organisation	This is the ultimate big trade club but meanwhile most of the world is moving towards either blocs like the EU or bilateral bloc agreements. This would be doing a 'New Zealand', low tariffs generally but not for agriculture. It would be a 'going global but solo' approach.
	Free Trade Area with EU	Create a new customized, pick'n' mix combination of features of the above, perhaps as Canada is doing	Uncharted territory, this would take a lot of negotiation, and with 27 member states unhappy about the UK's departure might be protracted, and is also TTIP-sensitive.
BREMAIN: STAY IN		Continue to negotiate and participate in EU processes	This is the status quo, but it is not static. The EU and its approach to food has changed dramatically over time. Involvement means a role in shaping that rather than standing on the sidelines.

Sources: authors, using Swinbank, Matthews, Buckwell, Grant et al.[68-71, 110]

8.3 At stake 3: Food supply and where UK food comes from

Food supply and self-sufficiency levels have varied, in line with UK domestic and foreign policy (see Table 6). The UK entered World War 2 producing about 30% of its

food needs. It ended producing about 60%. The lesson learned was a bitter one, and had been anticipated before and from World War 1. [15, 112, 113] Food production had been allowed to decline since the Repeal of the Corn Laws in 1846. This was the policy point at which the UK decided to pursue a 'cheap food' policy, sourcing food from anywhere in the Empire.[114] This, like the EU Brexit debate today, was a significant moment in food policy, and hotly debated throughout the 1820s-50s. It set a tone of thinking in Whitehall and Westminster, with political strands such as free trade, mercantilism, market liberalism, visible today.[115] World War 1 shook that policy framework, and exposed the UK's food dependency on its colonies. But it took a combination of 1930s recession and World War 2 to bury the policy. The Labour Government elected in 1945 quickly charted a different course, as any government would have. The 1947 Agriculture Act set out to rebuild national supply, setting up a system of market support and subsidies.[27] This was broadly in line with political and economic thinking across Europe and North America. The format countries took varied but there was consensus that the state should encourage production, and help even out the booms and slumps of trade cycles. The UK's entry to the Common Market meant a shift in modes of support but not that there should be no support.

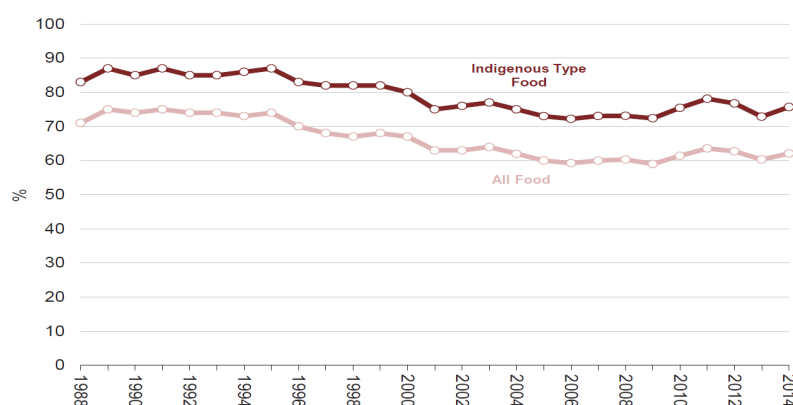
Table 6: UK all food self-sufficiency ratios over the last three centuries

Period	Estimated self-sufficiency
pre – 1750	around 100% (in temperate produce)
1750 – 1830s	around 90-100% except for poor harvests
1870s	around 60%
1914	around 40%
1930s	30 - 40%
1950s	40 - 50%
1980s	60 – 70%
2000s	Around 60%

Source: Defra 2006[116]

Figure 3 provides Defra's picture of what in everyday English is self-sufficiency but is formally termed the Food Production to Supply Ratio (FPSR).[117] This gives data from 1998 to 2014. This FPSR is calculated as the farm-gate value of raw food production (including for export) divided by the value of raw food for human consumption. Figure 3 shows a gentle decline since the high point of EU subsidies in the early 1980s. The all-food index is distinguished from 'indigenous' foods which the UK could grow itself. The UK imports apples, for instance, which could perfectly well be grown here, were economic and policy conditions right. This is a point championed by Brexiters concerned to cast off the shackles of Brussels.

Figure 3 UK food production to supply ratio, 1998-2014 (by value)



Source: Defra 2015[117]

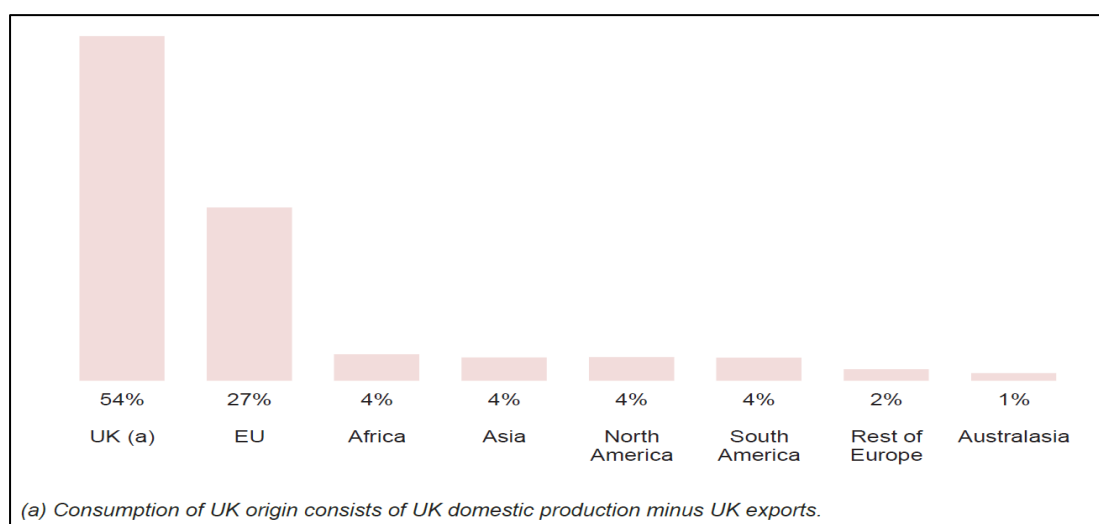
Before joining the Common Market in 1973, the UK sourced large quantities of food from its former Empire. It was long-distance food, mainly reliant on shipping, as Lord Woolton discovered to his horror when charged with food security in 1940.[28] It may have been 'cheap' to source food from far off where land and labour were cheap, but it had become a strategic weakness when circumstances changed.

Part of the politics tapped into by those favouring Brexit today is that somehow the past was rosier. Actually, the food supply since the UK joined the EU has been richer, more diverse and more regional (See Figure 4). This is particularly true for fresh produce (see Figure 5).

54% of food consumed in the UK now comes from home production, and 27% from the EU. Table 7 gives more specific data on UK reliance on EU foodstuffs. Imports of pigmeat is by far the greatest, and then fresh fruit and vegetables. More pork could be produced in the UK, but there are important ethical and sustainability questions raised about supposedly 'efficient' intensive pig production systems, wherever they are located. This is a sensitive issue within the EU on food. UK NGOs led the EU-wide campaign to improve animal welfare standards for pigs and poultry in particular.[118] But some British farmers resented this, and blame welfare standards for squeezing them out of production. This situation is cited by those favouring Brexit as a reason to leave. In fact, such standards are a real UK contribution to improved quality of production.

The big picture on UK food imports and exports was presented earlier in this Briefing in Figure 1. The UK exports £18.8 bn of food, of which £17.3 bn is processed. The UK imports £39.5 bn, of which £32.1bn is processed. **The Food Trade Gap is thus in £20.6bn deficit.** Figure 5 gives the figures for imports and exports, by produce. The Food Trade Gap has been rising slowly for years, with a slight drop in the last year, and is the rationale for the current Government's focus on exports, British branding and marketing.[119, 120] The forthcoming Defra *Food Nation* policy document sets out the 25 year strategy.[121]³⁹

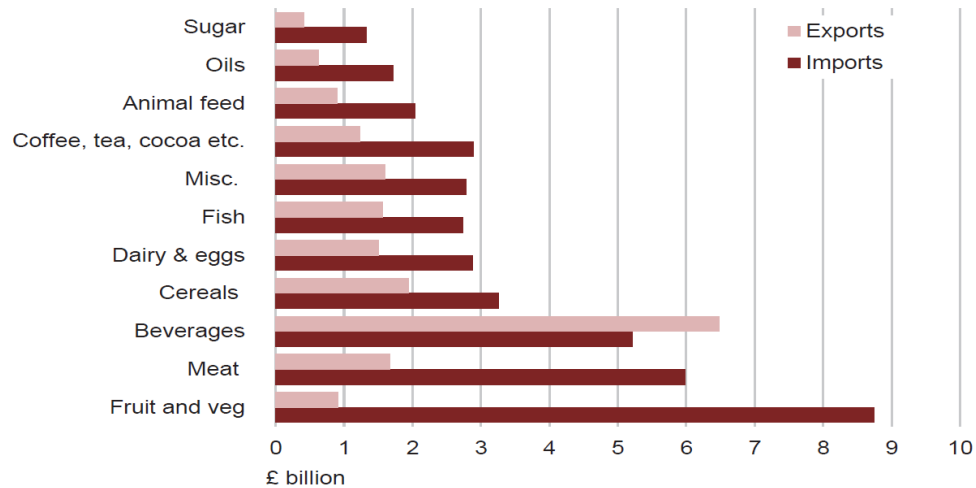
Figure 4: Origins of food consumed in the UK 2014, by value



Source: Defra 2015[117]

³⁹ Due at time of writing this Briefing Paper, this is set to focus on growing the market, encouraging competitiveness, develop resilience and maintain confidence in UK food.

Figure 5: The food trade gap, by food product, by £ bn



Source: Defra 2015 [117]

Table 7: Reliance on the EU as supplier and buyer of UK food

2014 provisional data '000 tonnes	Cereals	Refined sugar	Fresh veg	Fresh fruit	Beef and veal	Pigmeat	Mutton and lamb	Poultry meat
Production ('000 tonnes unless otherwise specified)	24,468	1,446	2,796	427	871	820	307	1,648
Imports from the EU	2,645	476	1,925	1,452	237	726	17	465
Total imports	4,018	1,175	2,179	3,614	324	737	112	495
EU imports as % of total imports	65.83%	40.51%	88.34%	40.18%	73.15%	98.51%	15.18%	93.94%
Exports to the EU	1,795	232	103	97	125	157	116	237
Total exports	2,471	326	118	99	134	219	117	331
EU exports as % of total exports	72.64%	71.17%	87.29%	97.98%	93.28%	71.69%	99.15%	71.60%
Total supply	26,016	2,295	4,857	3,942	1,061	1,338	302	1,812
EU imports as % of total supply	10.17%	20.74%	39.63%	36.83%	22.34%	54.26%	5.63%	25.66%

Source: Defra 2015 [45]

Whether the UK could and should produce more good food for a sustainable diet is to be debated, as is whether the country should reorient its food supply to meet sustainable dietary guidelines.[85, 92, 122] Neo-liberals reject unnecessary focus on home production, preferring the metrics of economic efficiency, free trade and markets. From a public health or environmental perspective, however, such metrics can be part of the problem – leading to damaging intensification.[100] Debates about what new goals and metrics are needed for a more sustainable food system are underway. It may, for example, be profitable for land to grow cereals to be fed to animals, which are inefficient energy converters, but it makes little ecological economic sense to do so. It would be better, surely, if food-producing land was in

future judged not by profitability or subsidy level alone but by how many people are fed per hectare.[123] These are the kinds of goals which a shift from the CAP to a Common Sustainable Food Policy or post-Brexit food system ought to espouse. Whether 'In or Out' post June 24, policy makers will have to address the need to make the UK food system more sustainable – healthier, lower carbon, more resource efficient and yet still affordable.

8.4 At stake 4: Ensuring the UK population is well fed

The FAO food security indicators (based on national figures) show the UK has a more than ample 'average dietary energy supply adequacy' (the indicator). This rose from 132% in 1994-95 to 137% in 2001-03 and has been there ever since.[124] Can the UK Government therefore relax about Brexit, confident that we have too much food? Perhaps not. Diet now has overtaken tobacco as the largest source of ill-health in England.⁴⁰ The most recent estimate is that diet now accounts for 10.8% of total disease burden and tobacco 10.7%. All studies show that the UK suffers an unsatisfactory diet-related health profile. Incidence of diet-related non-communicable disease has been high, but has been coming down due to more focussed intervention, NHS care and some public awareness. Few people suffer rank starvation in the UK but inequalities of income have dramatic effects on life expectancy and the quality of what different British consumers eat.[125, 126]

Increased food and its relative drop in household expenditure in the post war period has contributed to improved longevity. According to Public Health England and ONS data, life expectancy has risen by 6.4 years in the period 1990-2013, but the burden of disability i.e. living with ill-health, has not declined.[127] Indeed, part of the current reason for heated arguments over sugar is that the burden of disease is shifting, with people surviving but having long-term costly treatment while doing so. For instance, people survive with diabetes for longer than in the past but they endure a longer poor quality of life, and medical treatment costs rise.

The 2014 National Diet and Nutrition Survey showed that, as a population, the UK consumes too much salt, sugar and fat and not enough fruit and vegetables. Only 30% of adults aged 19-64 years and 10% of boys and 7% of girls aged 11-18 years meet the 5-a-day fruit and vegetable recommendation.[128] We are eating too much food, too much which is over-processed and not enough of the good stuff. Consumers then waste a considerable amount of purchased food, as if to add insult to injury (we return to this below). The EU is now engaging with this via the Circular Economy policy package.

The diet-health connection is complex and is one which the EU has side-stepped in CAP. Another reason is that Member State Governments fiercely protect healthcare as a matter for national competence. This is an example of the subsidiarity principle at work, introduced in 1992, and outlined in Article 5 of the Treaty on European Union.⁴¹ This principle is one which the UK ought to relish. It is the principle that "the EU does not take action (except in the areas that fall within its exclusive competence), unless it is more effective than action taken at national, regional or local level".[129]

The EU's role in diet and health has been limited to general health promotion, with a tiny fraction of funds allocated to fruit and vegetable marketing. Probably the most important EU health role has been the CAP, set up as we noted earlier, partly for food security reasons. Today, besides CAP, the EU has a significant health role in supporting new technology, funding R&D, and regulating labelling for consumers.[130] Achieving better nutrition labelling has been a long-term struggle within the EU. Consumer and health advocates pushed for decades to get information improved, meeting resistance far too often.[131-133] But gains have been made. Nutrition labelling came in on the back of acceptance, even by elements of the food industry, that too many 'dodgy' health claims were being made by

⁴⁰ Data are collated separately for Scotland, Wales and N Ireland.

⁴¹ See the definition of subsidiarity and accompanying Protocols: <http://eur-lex.europa.eu/summary/glossary/subsidiarity.html>

manufacturers. A standard nutrition label format was introduced in 2007 to fill that gap, and is under review.⁴²

Where might Brexit affect food and health? Modern food supply chains are managed through just-in-time logistics. Concerns about their disruption in the mid-2000s led Defra to contract a study from Cranfield University. This concluded that terrorist or other disruption inside the UK could be contained by switching supplies and logistics / routes.[67] Resilience was assured, it concluded. This analysis, however, did not envisage the entire food system having to be restructured, a systemic not just internal disruption. Yet, as has emerged, thousands of regulations and millions of contracts and supply routes would need to be reviewed following Brexit. Those favouring this course need to be clear how they would manage this.

From a public health perspective, Brexit raises both challenges and opportunities. The challenge would be to put in place a Plan B for quick implementation. The UK is not self-sufficient. Supplies would be disrupted. The public is used to full supermarket shelves. The pound sterling is widely expected to drop, so imports would be more expensive, and reliance on world markets could raise prices, but could also incentive new sources at home and abroad. One key sensitivity would be fruit and vegetables. The UK is 40% reliant on EU imports for fruit and vegetables. The population ought to be eating far more horticultural produce, but even at current consumption levels, the capacity for disruption would be considerable for both UK and EU. Defra ought to consider this a priority for its Plan B. This warrants further research from academics, too.⁴³

Food safety is an issue which would obviously be paramount. Since the food scandals about food poisoning, BSE ('mad cow disease') and adulteration in the 1980s and 1990s, most EU member states and many beyond have created food agencies and worked together to create better but appropriate food safety regulation and inspection.[134] The European Food Safety Authority was created in 2002 to help harmonise such policy development, to ensure that internal and external trade was within high standards. The horsemeat scandal of 2012-13 showed room for improvement but it also showed that traceability systems could be effective.[41] With Brexit, would pan-EU and external food safety governance continue or go into suspended animation, pending a new régime?

8.5 At stake 5: Food prices – can we afford all this?

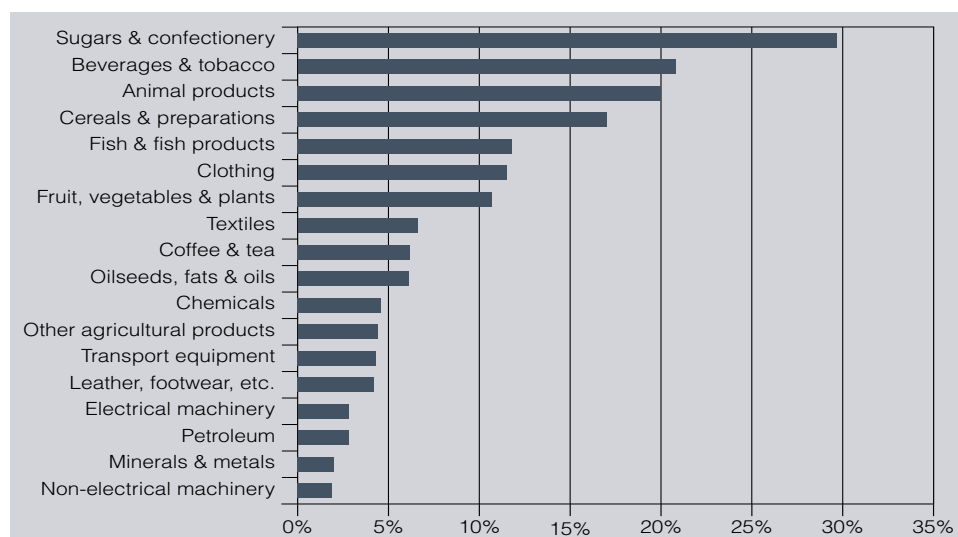
Like all affluent societies, the UK has experienced a slow but dramatic change in food prices since World War 2. The average household expenditure on food has dropped from around 25% of disposable income to under 10% today (more if eating out is included). The 20% lowest income households spend proportionately more, around 16%.[117] In 2014, the Food Research Collaboration published an assessment of UK food prices. In that, we presented government data suggesting that UK food prices were 14th equal in Europe, i.e. exactly in the mid-point of cheapness/expensiveness.[135] However, tariffs on imports if the UK was outside the EU might affect this situation.

Figure 6 gives the tariff rates that the Government suggests could be applied to UK goods entering the EU in the event of a Brexit. These are significant compared with the current zero tariff allowances.[105] It is not clear what the effects on UK food prices would be from Brexit. Remaining in the EU, there is at least a larger buffer and a close source of supply. Prices are fairly likely to rise following Brexit, due to disruption and sterling volatility. Studies are needed on whether this is the case and whether effects would be short or long term.

⁴² http://ec.europa.eu/food/safety/labelling_nutrition/claims/index_en.htm

⁴³ See the forthcoming Food Research Collaboration briefing on the state of UK horticulture.

Figure 6: Tariff rates applied by the EU, by broad category of goods



Source: HM Government 2016 [105]

Table 8: Expenditure on the CAP by member states

Member state	2014 financial year (€ million)		
	European Agricultural Guarantee Fund (EAGF) - Pillar 1	European Agricultural Fund for Rural Development (EAFRD) - Pillar 2	TOTAL
Malta	6	11	17
Luxembourg	34	1	35
Cyprus	57	23	80
Croatia	96	0	96
Estonia	100	62	162
Latvia	148	59	207
Slovenia	147	118	265
Slovakia	381	148	529
Finland	525	81	605
Lithuania	384	232	617
Belgium	612	17	629
Sweden	694	221	915
Netherlands	852	111	963
Bulgaria	602	394	996
Austria	721	284	1,005
Denmark	937	90	1,027
Czech Republic	894	283	1,177
Ireland	1,235	0	1,235
Portugal	736	737	1,473
Hungary	1,337	550	1,887
Romania	1,335	823	2,157
Greece	2,293	549	2,842
UK	3,242	691	3,933
Poland	3,215	1,787	5,002
Italy	4,516	1,204	5,720
Germany	5,197	933	6,131
Spain	5,583	964	6,547
France	8,370	798	9,168
TOTAL EU 28	44,248	11,172	55,420

Source: Bollen, 2015⁴⁴

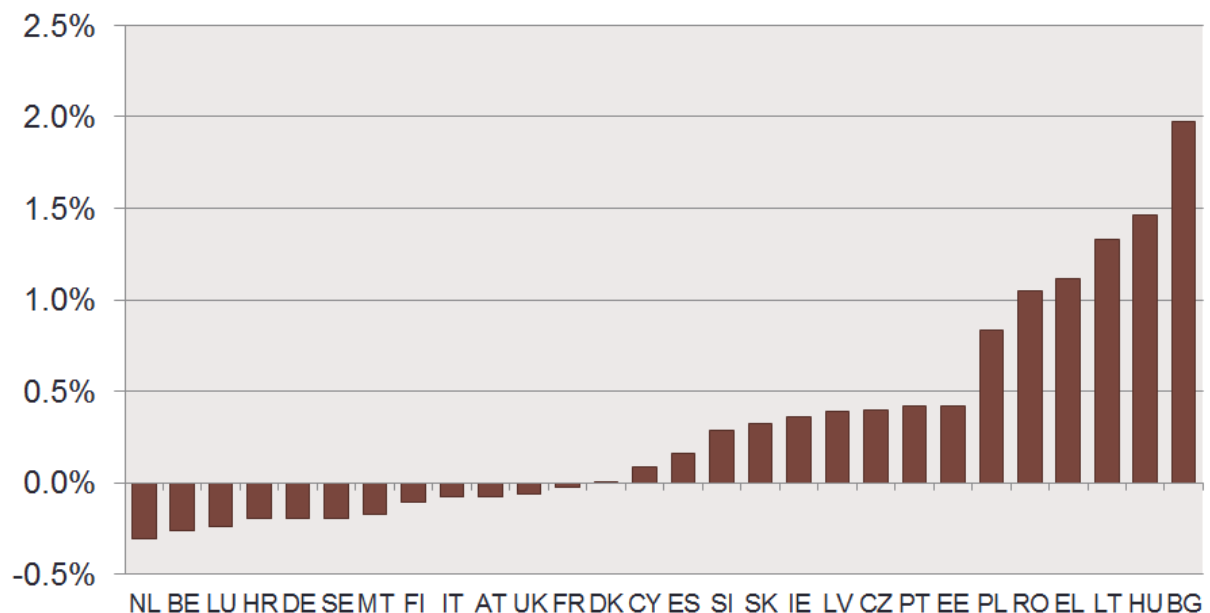
⁴⁴ Frank Bollen, personal communication (European Commission DG Agriculture Unit R1 Budget Management, Brussels), January 26 2016

One possible benefit, post Brexit, mooted by its supporters is that the UK would no longer contribute to the CAP. All those sums could be retained in the UK. Table 8 gives the expenditure on CAP by EU member states. The UK's obligations till 2020 would remain but thereafter the UK could be a net beneficiary. UK farmers receive nearly £4 bn in subsidies split between pillar 1 (production support) and pillar 2 (rural development and environment), but the UK taxpayer contributes far more to the EU as a whole.

This total, it should be noted, is a tiny proportion of the overall expenditure £198 bn UK consumers spend each year on food. Evidence from the OECD (which is hawkish on subsidies) now shows the EU as a whole spending much less than 1% of GDP on total subsidies, a bit more than the USA but a dramatic drop since the mid 1990s.[136] The UK's 'national contribution' excludes tariff revenue collected on imports into the UK and handed over to the EU. While EU-philes see tariff revenue as an EU resource, Eurosceptics argue differently. In economic terms tariff revenue is a transfer from the UK to the EU.

Prof Allan Matthews of Trinity College Dublin has calculated the net contributions that each Member State makes to the CAP budget, i.e. net inflow less each member state's contribution to the CAP budget.[137] Much of what each Member State contributes to the CAP it gets back as CAP expenditure so that the total amount redistributed between countries is relatively small (€13.6 bn in 2014 out of a CAP budget of €54 bn). 43% of this €13.6 bn was paid by Germany in 2014 with the UK making a much smaller contribution.⁴⁵ When this contribution is related to the size of the member state's gross national income (GNI), the UK is seen to be an even smaller net contributor with ten other EU states contributing a larger share of their GNI than the UK (see Figure 7).

Figure 7: Net gainers and losers from CAP expenditure, 2014 (% GNI)



Source: Mathews 2015[137]

⁴⁵ We are most grateful to Prof Alan Matthews for these calculations.

8.6 At stake 6: Food and the Environment

The EU's role in environmental policy has been considerable.[138] Arguably, this has been one of the EU's most positive roles in general and it has had definite and mostly positive effects in the food sphere. A review by IEEP of the policy and environmental implications of Brexit is due to be published after this Briefing Paper.[72] Pending that, the general view of environmental policy analysts is that the EU has generally been a good thing for environmental protection. A comprehensive framework of thinking and directives has emerged over four decades, and the EU has been a champion of cross-border compliance. If anything shows the value of thinking beyond national borders, it is the environment. Air, water, sea, food, wildlife, all cross national boundaries, even when the nations are islands such as Ireland or the UK. The EU has been a useful forum for international collaboration in this respect.

Major improvements have been achieved, for example, in water quality where its actions have constrained pollution and improved removal of agrichemical residues. It introduced energy labelling for white goods – but shamefully excluded food from such labelling.⁴⁶ The EU has also been a strong promoter of greenhouse gas emission reduction, and took a leading role at the Paris Climate Change talks in 2015.[56] It has also addressed everyday behaviour such as food waste, recycling and waste management. Led by the UK, which championed food waste reduction from the mid 2000s, the EU has calculated that around 100 million tonnes of food are wasted annually in the EU and could rise to over 120 million tonnes by 2020, unless policy changes.⁴⁷ Food waste is a key element in the rationale for the European Commission's circular economy policy package launched in December 2015.[43] Whether in or out of the EU, food waste is a major challenge. Despite interventions said to have prevented 1.9 million tonnes of waste a year, in 2015 WRAP still estimates UK food waste at 15 million tonnes (mt) out of 41 mt purchased. This is worth over £19 billion a year, emitting 20 mt of greenhouse gas (GHG).[139] 75% is avoidable. 7 mt are wasted by households, 3.9 mt by food manufacturing, 0.25 mt by retailing and wholesaling, 0.9mt by hospitality, and 3mt in out-of-home litter. Thus two thirds of the waste is consumer-linked.

The EU has had a less favourable profile over the Common Fisheries Policy. The UK is a significant net importer of fish, and the catch rose from 553,000 tonnes in 1887 to over 1 million tonnes at the start of the 20th century, and is now down to around 400,000 tonnes.[74] The Common Fisheries Policy has been almost as contentious as the CAP.[140-143] NGOs, chefs and academics, let alone fisherfolk, have expressed deep concern about the mode of fishing controls, threats to marine life and the institutionalisation of waste through the 'discards' system.[144] Bending to pressure, the CFP is now (at last) steering in a better direction. Brexit could undermine this recent progress. Although it has radically changed EU food markets, the Single Market policy in this respect can operate as a useful cross-border policy framework. Environmental externalities become transparent.

Although the EU has generally had a positive role on consumer labelling, environmental information has been excluded, despite a groundswell of pressure to do so. Ever since it took the lead on Sustainable Consumption and Production (SCP) work following the 1992 Rio conference, the EU has been a melting pot for experimentation and policy development on whether and how to dovetail public and environmental health through food.[145-148] Sweden has played an honourable role here, having offered to take the EU lead following the Rio Conference. Scandinavia, e.g. through the Nordic Council, can be a force for EU environmental (and food safety) innovation and leadership.[149] The UK ought to be helping. Yet, after years of diplomacy within and between the food industry,

⁴⁶ Stanley (later Lord) Clinton-Davies, when Commissioner for the Environment (appointed by Prime Minister Mrs Margaret Thatcher) informed TL, newly appointed as an advisor on food policy in the late 1980s, that this exclusion troubled him and that food ought to be included in such legislation. He was and remains correct that this anomaly ought to be rectified.

⁴⁷ http://ec.europa.eu/food/safety/food_waste/index_en.htm

consumers and environmental movements which had generated high level consensus that sustainable diets could be an important goal for lower carbon food systems,[150] in 2014 the newly constituted Commission led by President Juncker dropped the much anticipated Sustainable Food Communiqué. This was widely received outside as a retrograde step and mistake but done in the name of the Treaty of Lisbon agenda (now Europe 2020) of growth, jobs and a reduced regulatory role.⁴⁸

But the EU is not the only governance system to fear or to back away from promoting sustainable diets. When reviewing national dietary guidelines, expert committees have quickly concluded that these ought to include an environmental 'dimension'. Eating food is both a nutritional and environmental act. And consumers want full information. Yet too often this seemingly simple goal of providing population advice on how to juggle health, environmental and cost details has been lobbied against or rejected. Sweden first produced such advice in 2009,[151] but withdrew it after complaints to EFSA, almost certainly indirectly from the US meat industry, that the advice encouraged consumers to eat locally and seasonally. Sweden, a good EU member state, withdrew the advice albeit reluctantly, but has now launched less specific advice in the same vein.[152] In Australia, the nutrition guidelines review was considering sustainability advice and it too was forced to backtrack following fierce lobbying by the meat industry.[153, 154] In the UK, moves to create Integrated Advice for Consumers following the Cabinet Office Food Matters strategic review, were stopped when the Coalition Government was elected.[122] Most recently, the weighty 571 page evidence-based advice of the Dietary Guidelines for Americans scientific committee, which recommended new environmentally sensitive advice,[155] was also squashed by the agricultural lobby opposed to that direction. No such advice was included in what was published in January 2016 after a delay.[156] So far, only Qatar has managed to agree sustainable dietary advice.[157, 158] One might have expected that the other governments (of diverse political hue, it should be noted) could have accepted that consumers deserved such advice. This would be in accordance with the market logic they profess to favour!

8.7 At stake 7: Food Labour

The UK's history of food work is not a happy one. The lot of the British farm labourer since the UK industrialised was proverbially poor – bad conditions, poor quality tied houses and low wages.[159] Farm labour quickly migrated to the towns even before the Repeal of the Corn Laws, and in droves when farming went into decline by the end of the 19th century. In the 20th century there was a shift in the labour process not far short of a revolution. Today, while there are less than half a million jobs on or near the land, and about the same in food manufacturing. The labour force in food service is now enormous, with food retailing not far behind. Food is the UK's largest manufacturing sector.[58] For this vast combined sector, Brexit is a perceived threat after years of cross-border activity, lobbying, and defence. British consumers say they want fresh local foods, yet most picking of fresh fruit and vegetables has relied for years on migrant labour from within the EU. In 2008, the UK altered its Seasonal Agricultural Worker Scheme (SAWS).[160] And in 2013, the Coalition Government abolished the Agricultural Wages Board (AWB), despite protestations in Parliament led by Baroness Trumpington, a former Conservative Minister. The AWB had set 'fair' wages for this industrially weak labour force.⁴⁹ Its main protector is now the EU Working Time Directive (2003/88/EC),[161] and the UK minimum wage created by the Labour Government which took effect in 1999. Even that minimum wage was not in fact new, and was first introduced in 1909 and then replaced by Wages Boards. A new variant – dubbed a National Living Wage by the Conservative Chancellor George Osborne – was announced in 2015.⁵⁰ This raises

⁴⁸ http://ec.europa.eu/europe2020/index_en.htm

⁴⁹ The abolition of the Agricultural Wages Board was supported by the National Farmers Union and the Country Land & Business Association saying it was no longer needed. This means the EU legislation has become even more important in protecting farm workers.

⁵⁰ <http://www.bbc.co.uk/news/uk-politics-33437115>

the current minimum of £6.50 to £7.20 and rises to £9.00 by 2020. So policy has turned full circle.

Some caution is in order. This coincides with cuts elsewhere in national budgets to welfare support, so its advance is yet to be worked through. The cost of food (see previous section) is an integral part of living wage demands. What is the point of higher or lower wages if food prices rise or lower in tandem? What matters is relative cost, and whether the cost of the diet purchased with wages is good for health and sustainable i.e. whether wages can purchase a sustainable diet. [122, 162] Nevertheless, the commitment reflected the strong pressure and effective campaigning for a real living wage by Citizens UK, a community movement.

More broadly, the Referendum debate is heavily imbued with concerns about migration, with appeals to regain control over borders having a strong popular, not to say populist, appeal. The UK is not, it should be remembered, a signatory to the Schengen agreement.[163] While there is general freedom of movement within the EU, as per the Treaty of Rome, the UK retains border controls. In the food sector, there has been particular use of intra-EU labour on farms. There has also been a worrying minority use of forced labour, particularly of illegal labour.[164] This came to public attention with the shocking deaths of 23 Chinese cockle pickers on Morecambe Bay in 2004. Such labour is too often characterised by low wages (below the Minimum Wage), excessive hours, debt bondage, gang-masters brutality, and sub-standard housing. The UK took its own legal stance on stamping such practices out, and created the Gangmasters Licensing Authority.[165] The EU's role here has been to set pan-European standards for the length of time people work per day, the Working Time Directive. This has irritated employers but been a support for employees. It remains a key social element of the EU policy package.

Table 9 gives the number of people employed in the food sectors by origin. Food manufacturing, and food service are high users of EU labour. 27% of the UK workforce in the manufacture of food products comes from across the EU and 17% of the UK workforce in accommodation (hotels etc.). Manufacture of food products has the highest proportion of EU employees of all 87 sectors listed in this source, with accommodation the third highest. Food and beverage service activities is the ninth largest user of EU employees out of the 87 listed sectors. Brexit would almost certainly disrupt this state of affairs. This might have more direct and immediate effects on more of the population than farm labour, perhaps. A full-blown employee crisis would only arise in extreme circumstances such as if rights of workers were revoked; more likely is a slow strangulation of the food labour market creating a difficulty for replacing workers over time. These scenarios deserve more research.

Table 9 Numbers employed in the UK by origin 2014

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

Source: ONS personal communication, 2016 [166]

8.8 At stake 8: Food culture, the hearts and minds issue

This list of issues potentially at stake concludes with the matter of food culture. This deserves serious consideration in the Brexit debate, something it has not so far received. Food is about identity. And British culinary identity – long troubled and often criticised for being unimaginative^[167, 168] – actually has rich roots, altered by industrialisation two centuries ago and the battle for ‘cheap food’ won by industrial interests with the Repeal of the Corn Laws in 1846.^[169] Early food campaigners in the post World War 2 period such as Raymond Postgate, founder of the *Good Food Guide*, and Elizabeth David, doyenne of food writers, and Derek Cooper, presenter of BBC Radio 4’s *Food Programme*, worked tirelessly for the rebirth of good food for all. Decent food, a good range of choice, the capacity to be able to cook with confidence, a fair degree of knowledge about food quality, these are the hallmarks of a confident food culture. Above all, a good food culture is about a decent level for all – hence the importance of modern campaigns about the impact of low incomes on food intake.^[170-172]

When the UK joined the Common Market in 1973, four decades of food cultural exchange and change began. Airline routes opened up. Holidays became easier. Passport controls altered. Exchange of healthcare, if taken ill on holiday, followed. Southern European foods – olive oils, peaches, fresh horticultural produce – entered UK supermarkets. British holidays opened us to culinary options never known except by many ordinary British except through military service, perhaps. The British became wine drinkers on a scale never known before, except possibly by an affluent élite. The British took to European cuisines. They became interested in food! British cooking and food tastes have been transformed. The old jokes about lousy British food have been rendered obsolete. Cities and towns have become proud of good restaurants and the rebirth of regional culinary culture. TV chefs became celebrities. Eating out has been normalised. Pizza is now children’s favourite food; many think pasta ‘British’. This is cultural exchange on a massive scale.

This Europeanisation of UK food culture is surely to be acknowledged, indeed treasured. It is not directly caused by the EU. Drivers are increased wealth, travel, education and generational shift. But membership of the EU has been part of that, too, easing flow of food. Culturally, the significance is perhaps on a par with the saying that people who eat together are less likely to fight each other - although normal family life can sometimes suggest otherwise! There are counter trends, too, and many examples of deracinated foods. Cheddar cheese is made everywhere as though it is not named after one place in Somerset, south west England! Critics worry about mock ‘local’ foods.⁵¹ Consumer aspirations for the local are subverted. Cafés are likely to be chains rather than small scale family enterprises. Some of this process is the result of commercialisation, supermarketisation and corporate concentration rather europeanisation. And there are reactions to that. The rebuilding of the British cheese sector is often cited as one example.⁵² So is the renaissance of real bakeries, and the celebration of artisanal production and local foods. The growth of new patterns of diversity is a testament to the liquidity of the European project as transformed by ordinary people. This is people voting with their weekly shopping and lifestyles, learning and experimenting with their foods. This is not to be ignored, surely, in the Brexit debate. Will the British have the confidence to move forward and accept this remarkable post-war culinary learning?

⁵¹ See the complexity identified in the EU 7th Framework GLAMUR project: <http://glamur.eu/>

⁵² There are an estimated 100 more UK artisanal cheeses now than in France according to the British Cheese Awards.

CONCLUSIONS

The Brexit/Bremain debate is of considerable significance for food in the UK. Many complex issues have been raised in this Briefing Paper.

In our view, the real agenda facing the UK food system and food systems at all levels - local, national, regional, European and global – is the need to move rapidly to a more sustainable basis. The food systems built by the rich world are now widely agreed to be unsustainable. Ecosystems are under threat from food. Our food systems are too carbon intensive, and waste water, land and material resources. They play major roles in threatening the future. The health externalities, too, are immense. Diet is the greatest contributor to the burden of disease. Food is systemically wasted. The UK and EU have to address this challenge whether together or separately. We detect some reluctance to accept this in the Referendum debate so far.

Faced with such challenges, one can legitimately argue, as we have above, that the Brexit debate is at worst a side issue or deviation, and at best a serious distraction. Yet it is now serious politics. Like many academics we are deeply concerned about the Referendum disrupting policy energies and capacities which ought to be working together. The vote is already in danger of dividing political parties, the country and the EU which is, despite imperfections, one important mechanism for facing the complex food challenges ahead.

The British people will decide on June 23. Making individual decisions should not blind us to the urgent need to work collaboratively with other countries to move towards food sustainability. This Briefing Paper has suggested both positive and negative aspects of current policy at the EU level. While academics and civil society organisations have been loud but reasoned critics of the food policy status quo, the verdict on the EU cannot be simply put in black and white. The EU has been progressive on some food fronts such as the environment, food safety, water quality, but has hindered progress on other fronts. It has been a bulwark against powerful forces, but it also is subverted by them. It has built post World War 2 food security but it also is now currently undermining moves to create a level playing field for more sustainable diets.

As a governance system, the EU can be criticised for being too slow, too cumbersome, too timid – sometimes all of these. The Commission is certainly currently in ‘minimalist’ ‘don’t dare to do too much’ mode. Brexiters, however, are seemingly unconcerned by the threat to food from a drop (or volatility) in the value of sterling. And precisely how will the UK sever food ties with its main source of food imports? The Brexit option exposes the current dire state of UK food dependency on non UK food sources. This is the result of 170 years of policy pursuit of cheap food sourced from wherever and suggests a misuse of the UK’s ample and well-watered land with food growing potential.

This Briefing Paper concludes that the UK should wake up to the enormity of unravelling 43 years of co-negotiated food legislation and exchange. There is a worrying lack of clarity as to what would be sought on June 24 by the Government should the people vote to Brexit. This is food politics at a high level, with splits in the Conservative Right so far setting the tone and direction of the debate. In the run up to the vote, Brexiters should be asked what they would do about food planning. And Bremainers should be pressed to redouble efforts to get the UK food system onto a more sustainable footing.

Hopefully, this Briefing Paper has offered some clarity about the significance and importance of food when perusing the Referendum options. Whether the people vote to Bremain or Brexit, the sustainability challenges must be engaged with by academics, civil society organisations and the people. They must be addressed with renewed vigour. We must not lose sight of the real food challenges. They remain urgent whatever the vote.

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