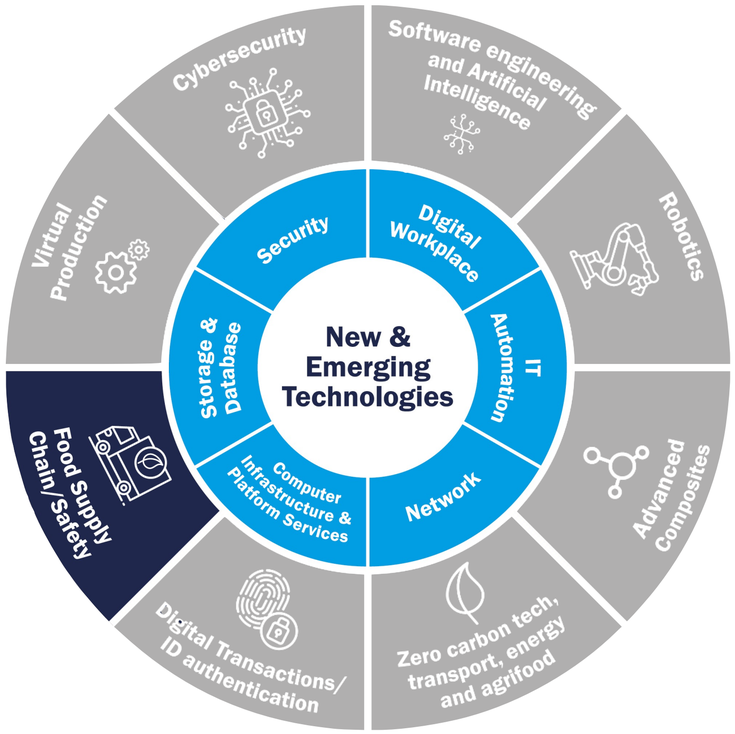

Sources	University of Oxford
Date	December 2020

Potential scale of impact	Certainty of outcome	Impact horizon
★★★★	★☆☆☆	H1 H2 H3

UKRI's Mapping the UK Food System report explores the multiple challenges facing the UK food system. Diets too rich in fat, sugar, and meat and too low in fruit and vegetables are contributing to obesity and related health problems, especially in deprived households. Unsustainable production methods are driving biodiversity loss, soil degradation, pollution, water scarcity and climate change in both the UK and overseas. Poor working conditions persist, especially for low-skilled labour.

Some of the major findings in this report include:

- **Concentration in the UK economy has increased with time**. There are ten large food retailers. The top five food manufacturers have a £30 bn turnover. There are two main UK players in contract catering. US multinationals dominate fast food alongside SMEs.
- **While the food sector is the biggest employer in the UK, 30% of food manufacturing employees are from the EU** (63% of which are in meat processing plants). Other food sectors have low wages, and lack of appropriate workplace skills is a growing problem.
- **The UK has the third highest volume sales of ultra-processed foods per capita** out of 80 high- and middle-income countries, and the most processed diet of countries in Europe. This contributes to the 63% of UK adults being obese or overweight.
- **Land use is dominated by animal and cereal production** (e.g. 52% of croppable area in the UK is covered with cereals).
- **The UK heavily relies on external food sources**. 53% of food consumed in the UK in 2018 was produced domestically, followed by 23% sourced from the EU. There are financial deficits in all food categories, except for drink (due to whisky exports). The UK is importing food that can be grown here, albeit often dictated by seasonality.

The report adopts a food systems approach, exploring multiple perspectives, addressing differing objectives, analysing trade-offs and exploring complexity. It helps to identify the motives of different food system actors and the range of policy, market, social, technological, and biophysical environmental drivers that influence their activities. An interactive tool allows users to explore how the system works.

The report notes that transformational change in the food system is needed.

MAPPING THE UK FOOD SYSTEM

Transformational change needed