



House of Commons
Environment, Food and Rural
Affairs Committee

**Brand Britain:
promoting British food
and drink**

Fifteenth Report of Session 2017–19

*Report, together with formal minutes relating
to the report*

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The Environment, Food and Rural Affairs Committee

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Summary

Food and drink manufacturing is the UK's largest manufacturing sector, contributing £28.2 billion to the economy annually. In 2018, food and drink exports were worth £22.6 billion. Trade is therefore vital for the food and farming industries. Our inquiry explored whether enough was being done to promote British food and drink, at home and abroad.

In the domestic market, research shows that origin is important to some British consumers, but purchasing behaviour is primarily driven by price. Food's origin can be found on the label, but less often for processed food. The Government should introduce requirements for the origin of characterising ingredients in processed foods to be specified on labels, for example, the origin of the poultry in a chicken curry. This would enable those consumers who prefer to buy British to make informed choices.

Awareness of British food and drink is low in international markets. This provides an opportunity for improvement, particularly if promotion is tailored to the values of each market, for example emphasising the safety of British food in China. However, more research is required to work out the best ways to promote British products overseas and increase exposure to British food. Recognising this gap, the Agriculture and Horticulture Development Board (AHDB) has made commendable efforts to provide international market intelligence. We also support the Food and Drink Federation (FDF) proposals for a market research unit, which ought to provide insights to enable the Government and exporting businesses to promote and market British products more effectively.

The AHDB currently conducts market research across both domestic and international markets. It is not clear if this dual responsibility is the most effective arrangement. The current review of the AHDB should consider whether the balance of funding between domestic and international market intelligence and promotion is fit for the future. AHDB should also assess if more needs to be done to promote to the domestic market. Furthermore, the Government should also consider the case for splitting responsibility for domestic and overseas promotion, so these two, different, important markets are not competing for resources from the same pot.

We heard concerns that not enough is being done to support companies that want to export. International trade shows are crucial to promoting British food and drink abroad. The Government's Tradeshow Access Programme (TAP), which provides support to business to attend trade shows abroad, is seen by industry as an important way for companies, particularly SMEs, to promote their businesses and break into new markets. We therefore welcome the increased focus on SME participation in TAP. However, TAP spend on food and drink has declined by 10 per cent since 2017/18, as part of an ongoing trend of decreased funding and the rules on accessing grants have become more restrictive. Given the Government's export ambitions, the Tradeshow Access Programme should be reviewed urgently, in consultation with industry and trade associations. Funding should be potentially increased as part of the upcoming Spending Review.

We were satisfied that the Government is on track to meet its modest target to increase food exports to £23 billion by 2020. The UK Food and Drink International Action

Plan (IAP) 2016–2020 should be reviewed and updated immediately, with a new plan published for 2021–2025. A key focus of the next IAP should be on improving export activities of SMEs. The next IAP should also be accompanied by a more ambitious target for the value of food exports.

While progress is being made in some areas, we are concerned that the Government is not being ambitious or strategic enough in its approach to marketing and export activities. The food and drink industry has recognised what needs to be done to increase export activities via its proposed Food and Drink Manufacturing Sector Deal. The Government should approve this Sector Deal immediately and confirm a timetable for its implementation. Market access and increasing exports do not happen overnight, and action must be taken urgently.

Introduction

1. The UK's food and farming industry generates over £110 billion a year and employs one in eight people in the UK.¹ Food and drink manufacturing is the UK's largest manufacturing sector, contributing £28.2 billion to the economy annually.² Around 96 per cent of businesses in food and drink manufacturing are small and medium enterprises (SMEs) and the sector is geographically widespread across the UK.³ As well as feeding the domestic market, the food industry also exports goods; in 2018, food and drink exports were worth £22.6 billion, even though only around 17 per cent of food and drink companies export.⁴ The European Union (EU) is the UK's single largest trading partner, accounting for £13.9 billion, or 61 per cent, of these exports.⁵ Trade is therefore economically vital for the food and farming industry.

2. We examined how Brexit might affect trade in our February 2018 report *Brexit: Trade in food*, which focused on trade under World Trade Organization (WTO) rules, in the event that the UK and EU did not reach a trade agreement.⁶ During that inquiry we heard that more resources should be invested in marketing the UK abroad.⁷ We decided to scrutinise this and related questions in more detail. Our inquiry into Brand Britain: Promoting and marketing British food and drink was therefore launched in May 2018.⁸ We received 49 written submissions and held four evidence sessions between January and March 2019, having been delayed by the necessity of scrutinising the Agriculture Bill, Fisheries Bill and draft Environment (Principles and Governance) Bill. We would like to thank everyone who contributed to our inquiry.

3. This Report is structured as follows: Chapter 1 considers the promotion and marketing of British food and drink in the UK. Chapter 2 examines promotion and marketing of British food and drink overseas. Chapter 3 focuses on export support and Chapter 4 on future strategy.

1 Environment, Food and Rural Affairs Committee, Third Report of Session 2017–19, [Brexit: Trade in food](#), HC 348, para 1

2 Food and Drink Federation, [THE FOOD AND DRINK INDUSTRY: Economic contribution and growth opportunities](#), July 2018, p 2

3 Food and Drink Federation, [THE FOOD AND DRINK INDUSTRY: Economic contribution and growth opportunities](#), July 2018, p 3

4 Food and Drink Federation, ['Exports snapshot Q4 2018'](#), accessed June 2019; [Q146](#) [Dominic Goudie]

5 Food and Drink Federation, ['Exports snapshot Q4 2018'](#), accessed June 2019

6 Environment, Food and Rural Affairs Committee, Third Report of Session 2017–19, [Brexit: Trade in food](#), HC 348

7 Environment, Food and Rural Affairs Committee, Third Report of Session 2017–19, [Brexit: Trade in food](#), HC 348, para 122

8 Environment, Food and Rural Affairs Committee, ['Brand Britain inquiry launched'](#), 14 May 2018

1 British consumers

Perceptions of British food and drink

4. Many surveys have been carried out to identify what appeals to British consumers when choosing food products. The Agriculture and Horticulture Development Board (AHDB) report in May 2018 “revealed that almost 70% of shoppers want to see more British food in stores and almost three in four would buy more British food if it demonstrated it was better value”.⁹ Research by the Institute of Grocery Distribution (IGD) has found that “just under a half of shoppers state that it has become more important to buy products that support local or British producers now the UK is leaving the EU”.¹⁰

5. However, when surveyed, although British shoppers demonstrated a preference for buying British, they were also very price-conscious.¹¹ The National Farmers’ Union (NFU) stated that “cost wins out over country of origin” and that “if the cost of British food increased [...] by 25%, six in ten (60%) would stop buying British and instead get the equivalent from abroad”.¹²

6. Furthermore, “British” may be “shorthand for other product/production attributes that shoppers value (e.g. local benefits, fresh, authentic, sustainable)”.¹³ In particular, “there is a strong association between ‘British’ and ‘quality’” and “58 per cent of shoppers agreed that British or local helps to identify products as higher quality” in the categories of fresh produce, fresh meat and fish, and dairy.¹⁴ Jim Moseley, CEO of Red Tractor Assurance, told us that:

If you ask shoppers the question, “What is important to you when you buy food?” the immediate answer will always be price and quality. [...] a lot of people will then go on to talk about how, by quality, they mean provenance, authenticity, safety and traceability.¹⁵

He added that “lots of people will say that British is great because it supports British farmers, it is probably fresher and it has done fewer road miles”.¹⁶ However, when it came to other markets, particularly English-speaking markets such as the USA or New Zealand, “if the price is right”, there is no barrier for consumers to buy products from those markets.¹⁷

7. Research shows that origin is important to some British consumers, but purchasing behaviour is primarily driven by price.

9 Agriculture and Horticulture Development Board ([BFD0013](#)), para 50; The AHDB is a levy-funded “independent go-to source of trustworthy information and evidence-based research” that aims to help “the industry understand and deliver what consumers will trust and buy”. AHDB levies are paid by farmers, growers and others in the supply chain, see AHDB, ‘[Levy information](#)’, accessed June 2019

10 AHDB, [Consumer insights](#), (May 2018), p 2

11 Agriculture and Horticulture Development Board ([BFD0013](#)), para 49

12 National Farmers’ Union ([BFD0016](#)), para 46

13 AHDB, [Consumer insights](#), (May 2018), p 2

14 AHDB, [Consumer insights](#), (May 2018), p 3

15 [Q97](#)

16 [Q98](#)

17 [Q99](#)

Country of origin labelling

8. The most direct method of informing consumers about the origin of their food in a retail context is the information provided on packaging and labels. While it is relatively straightforward to label “the origin of a cut of meat or a piece of fruit”, it is more complicated for “manufactured goods containing multiple ingredients”, as Dominic Goudie, Policy Manager for Exports at the Food and Drink Federation (FDF), explained:

when you have multi-ingredient products in small packaging, which already face so many demands around labelling of nutrition requirements, adding origin for each and every ingredient becomes very challenging. [...] some of these producers are changing sourcing throughout the year. Printing new labels each time you change the source becomes very difficult to do.¹⁸

Ruth Edge, Chief Food Chain Adviser at the NFU, argued that “the characterising ingredient is the most important part”.¹⁹ For example:

if you have a chicken curry, the NFU would like to see it being very clear where the chicken is from, especially if it is named on the label. We would not want to see every ingredient on a pizza, because that is ludicrous, but it would be good for consumers to be able to see the origin of those characterising ingredients.²⁰

Jim Moseley, Red Tractor, raised the potential for blockchain (a publicly-visible, decentralised electronic ledger²¹) to enable scanning of “the QR code or barcode and see absolutely where every ingredient has come from”, although he noted that “the technology is a little way off at the moment”.²²

9. We scrutinised country of origin labelling during our *Brexit: Trade in food* inquiry.²³ EU regulations on country of origin labelling “allow for meat products to be labelled with the country where the last significant change in production took place—and not necessarily where the animal had spent its entire life”.²⁴ We recommended that the Government improved country of origin labelling following the UK’s departure from the EU, so that consumers were informed about the food that they were eating.²⁵ During this inquiry, David Rutley MP, Parliamentary Under-Secretary of State for Food and Animal Welfare (hereafter referred to as the Food Minister) stated that “as we leave the EU, there will be opportunities in terms of food labelling and how we can help make that more transparent”.²⁶ He explained that “while we are in the EU, we do have state aid rules” which “make it more complicated about how we can promote product and produce by origin”.²⁷

18 [Q105](#)

19 [Q108](#)

20 [Q108](#)

21 Treasury Committee, Twenty-Second Report of Session 2017–19, [Crypto-assets](#), HC 910, para 4

22 [Q108](#)

23 Environment, Food and Rural Affairs Committee, Third Report of Session 2017–19, [Brexit: Trade in food](#), HC 348, paras 129–133

24 Environment, Food and Rural Affairs Committee, Third Report of Session 2017–19, [Brexit: Trade in food](#), HC 348, para 130

25 Environment, Food and Rural Affairs Committee, Third Report of Session 2017–19, [Brexit: Trade in food](#), HC 348, para 133

26 [Q262](#)

27 [Q262](#)

10. *The Government should introduce requirements for the origin of characterising ingredients in food products to be specified on labels. This would enable consumers to make informed choices.*

11. *The Government should explore the potential of blockchain and similar technology to increase transparency and traceability in the food supply chain. This could be useful for consumers when buying food and drink products with multiple ingredients and where ingredients may have crossed international borders during processing.*

Red Tractor assurance schemes

12. Food assurance schemes help to provide guarantees that food has been produced to particular standards.²⁸ In the UK, such schemes are run as product certification schemes accredited by the United Kingdom Accreditation Service (UKAS).²⁹ These schemes use regular independent inspections to check that members are meeting specific standards.³⁰ Producers meeting the standards are able to display a logo on their food products as a signal of quality to consumers.³¹ The Food Standards Agency (FSA) monitors whether communications and claims made by assurance schemes are accurate.³²

13. Red Tractor is, according to the Government, “the leading quality kitemark in the UK”.³³ The Red Tractor logo “can be found on over £13.5 [billion] worth of British food & drink products” and “the scheme spans every sector of agriculture except for eggs and fish”.³⁴ Red Tractor told the Committee that:

British consumers are concerned about the safety and traceability of their food and the way it has been produced. In an era of increasing labelling complexity and concerns over food produced to lower standards, they are looking for simple, independent signposts that they can trust.³⁵

Research it had commissioned found that “over two thirds (69%) of UK primary shoppers recognise the logo and around 58% state that the logo positively influences their food purchasing decisions”.³⁶

14. Red Tractor has specific standards for: chicken; pork; beef and lamb; dairy; and fresh produce and crops.³⁷ In relation to traceability, Red Tractor stipulates that all chickens, pigs, cattle and sheep “must be born, reared and slaughtered in the UK” for products to display the Red Tractor logo.³⁸ Other standards relate to animal welfare, use of antibiotics and environmental protection.³⁹ Red Tractor assurance that meat and poultry are British is not explicit at the point of purchase; only the logo usually appears on food products.

28 Food Standards Agency, ‘[Food certification and assurance schemes](#)’, accessed June 2019

29 Food Standards Agency, ‘[Food certification and assurance schemes](#)’, accessed June 2019

30 Food Standards Agency, ‘[Food certification and assurance schemes](#)’, accessed June 2019

31 Food Standards Agency, ‘[Food certification and assurance schemes](#)’, accessed June 2019

32 Food Standards Agency, ‘[Food certification and assurance schemes](#)’, accessed June 2019

33 Food Standards Agency, ‘[Food certification and assurance schemes](#)’, accessed June 2019

34 Red Tractor Assurance ([BFD0040](#)), executive summary

35 Red Tractor Assurance ([BFD0040](#)), executive summary

36 Red Tractor Assurance ([BFD0040](#)), para 9

37 Assured Food Standards, ‘[Standards chart](#)’, accessed June 2019

38 Assured Food Standards, ‘[Standards chart](#)’, accessed June 2019

39 Assured Food Standards, ‘[Standards chart](#)’, accessed June 2019

The NFU considered that although the majority of consumers recognised the logo, “the standards that sit behind this marque need to be explained to consumers”.⁴⁰ We asked Jim Moseley, CEO of Red Tractor Assurance, about this and he responded:

We started a campaign last September, which was spearheaded on national TV. [...] We have limited funds, so it was only on air for about five weeks, but we intend to continue it this year, probably with three bursts of activity and then a lot of activity on social and in print. All of it is designed to increase understanding among consumers of what it is that Red Tractor does and therefore what benefit it has for them.⁴¹

15. Jim Moseley told us that “post advertising, the awareness of Red Tractor is higher than Fairtrade” and that 61 per cent of main shoppers “say they are positively inclined to purchase” if they see the Red Tractor logo.⁴² He stated that “if you have a pork chop and a Red Tractor pork chop, we have clear evidence that people will trade to the Red Tractor product”.⁴³

16. The Food Minister told us that Red Tractor “has received some really outstanding international recognition for the work it does” and “stands high in international benchmarking and is setting world-leading standards”.⁴⁴

17. Red Tractor provides an assurance for British consumers about the traceability and British origin of meat and poultry. Some efforts have been made by Red Tractor to increase consumer awareness of the underlying standards and these promotional activities should continue. We suggest that Red Tractor should also assess the impact of its logo and further promotional activities on actual purchasing behaviour rather than just consumer surveys.

18. The potential role of Red Tractor and assurance schemes in international marketing is explored in the next chapter.

40 National Farmers’ Union ([BFD0016](#)), para 47

41 [Q104](#)

42 [Q111](#)

43 [Q111](#)

44 [Q284](#)

2 International markets

Consumer perceptions of British food and drink

19. The UK exports agricultural commodities, but the Food and Drink Federation's (FDF) export statistics show that in 2018, the top five UK food and drink products exported (by value) were whisky, chocolate, cheese, salmon and wine.⁴⁵ The FDF stated that “the quality, trust, heritage and innovation of our food and drink products are all major strengths, and resonate with middle class consumers in rapidly developing countries, where food and drink is typically the entry point for those seeking a more westernised lifestyle”.⁴⁶ However, “British origin products are still very niche”.⁴⁷ The AHDB reported that “general awareness of British food is fairly low” in overseas markets, highlighting “the necessity for exposure to products and clear branding to drive awareness and build brand reputation”.⁴⁸

20. The AHDB's April 2018 report on International Consumer Buying Behaviour stated that “we cannot simply rely on the Union flag and Big Ben to ‘sell’ British produce in a complex and fragmented series of consumer markets”.⁴⁹ AHDB consumer research in 2017 asked “what was most important to consumers when choosing the food they purchase” (see Figure 1).⁵⁰

Figure 1: The two most common priorities when choosing food⁵¹



45 Food and Drink Federation, ‘Exports snapshot Q4 2018’, accessed June 2019

46 Food and Drink Federation (BFD0021), para 12

47 National Farmers’ Union (BFD0016), para 16

48 Agriculture and Horticulture Development Board (BFD0013), para 9

49 AHDB, *International Consumer Buying Behaviour*, (March 2018), p 4

50 AHDB, *International Consumer Buying Behaviour*, (March 2018), p 5

51 AHDB, *International Consumer Buying Behaviour*, (March 2018), p 5

In seven out of the nine countries surveyed, “quality” was the most important factor, but for China and Japan, “food safety” was the first and second priority respectively.⁵² The AHDB attributed this to recent food safety scares in China and food contamination concerns following the Fukushima nuclear incident in Japan.⁵³ As with British consumers, there are differing views on what constitutes “quality”, and this also varies by food category.⁵⁴ For example, German consumers judge the quality of meat by appearance, taste and origin, whereas for Indian consumers, meat quality was judged by health benefit, food safety and expiration date.⁵⁵ The British Meat Processors Association (BMPA) stated that because quality means different things in different countries, “messaging needs to be tailored accordingly”.⁵⁶ The BMPA added that the British “have a reputation for stringent regulation and high standards and these may well be more effective attributes to promote in many markets”.⁵⁷ This is because “responsible food supply chains are highly valued overseas and very important to satisfy food safety concerns in countries such as China and Japan”.⁵⁸

21. The FDF has submitted a Sector Deal proposal to the Department for Business, Energy and Industrial Strategy (BEIS) for negotiation.⁵⁹ It proposed the establishment of a “Market Research Unit that produces market and sector intelligence reports [...] to support export prioritisation”.⁶⁰ The FDF stated that “there is market failure in the provision of market research to support export prioritisation” and that “large food and drink businesses gamble on new markets as it is cheaper to fail than to pay for research”.⁶¹ We asked Phil Hadley, International Market Development Director at the AHDB, whether the proposed market research unit suggested a failure in AHDB’s market intelligence efforts and he told us that AHDB’s “market intelligence work has been domestic focused” and that this had been successful in tracking UK consumer trends and buying patterns.⁶² He added that:

If the question is about whether it has failed in the international market, it is only in the last 12 or 18 months that we have begun to cast the net a little wider, recognising there are gaps on the international front that we could learn more about and, therefore, tailor our international work more effectively. [...] It is a new stream of work for us, so I do not think it is a failure, but we recognise it is a gap that was not being filled that we should.⁶³

22. We launched this inquiry to explore what work could be done to promote British products overseas, as well as to consolidate the domestic market. Quality Meat Scotland

52 AHDB, [International Consumer Buying Behaviour](#), (March 2018), p 5

53 AHDB, [International Consumer Buying Behaviour](#), (March 2018), p 5

54 AHDB, [International Consumer Buying Behaviour](#), (March 2018), p 5

55 AHDB, [International Consumer Buying Behaviour](#), (March 2018), p 14

56 British Meat Processors Association (BFD0035), p 1

57 British Meat Processors Association (BFD0035), p 1

58 British Meat Processors Association (BFD0035), p 1

59 Food and Drink Federation, [‘Food and Drink Manufacturing Sector Deal Proposal’](#), accessed June 2019; Sector Deals are partnerships between the government and industry on sector-specific issues that can “create significant opportunities to boost productivity, employment, innovation and skills”. There are currently nine sector deals (Life Sciences, Automotive, Creative Industries, Artificial Intelligence, Construction, Nuclear, Aerospace, Rail and Offshore Wind. See Department for Business, Energy and Industrial Strategy, [‘Introduction to Sector Deals’](#), accessed June 2019

60 Food and Drink Federation, [‘Food and Drink Manufacturing Sector Deal Proposal’](#), accessed June 2019

61 Food and Drink Federation ([BFD0021](#)), para 3

62 [Q208](#)

63 [Q208](#)

noted that “GB plc brand tends to be positively recognised in some former Empire/ Commonwealth nations but less in other countries”.⁶⁴ In the tourism sector, marketing has been developed in a manner that recognises national and regional identities under overarching British branding, through the tourism boards VisitBritain, VisitEngland, VisitScotland and Visit Wales.⁶⁵

23. Research suggests that awareness of British food and drink is low in international markets. This provides an opportunity for improvement, particularly if promotion is tailored to the values of each market, for example emphasising the safety of British food in China. More research should be done into some overseas markets to work out the best way to promote British products overseas and ensure greater exposure to British food.

24. International market research to support exports is lacking, and this has been recognised by the Agriculture and Horticulture Development Board (AHDB) and industry. We commend the efforts of the AHDB in increasing its focus on international market intelligence and support the Food and Drink Federation’s (FDF) proposed market research unit. Because the AHDB and FDF support different parts of the food and drink industry, these efforts should be complementary. However, this should not be taken as a given and it would be useful for businesses if market research was coordinated. The Government and AHDB must work closely with the FDF to develop and support the new market research unit. The market research unit ought to provide insights to enable the Government and exporting businesses to promote and market British products more effectively.

25. More should be done to increase overseas consumer exposure to British food and drink. We recognise that this needs to be done sensitively and in a way that enables nations of the UK to retain their separate identities - as has been done with the tourist boards, VisitBritain, VisitEngland, VisitScotland and Visit Wales.

Food is GREAT campaign

26. In October 2016, Defra published the UK Food and Drink - International Action Plan 2016–2020 (IAP).⁶⁶ The IAP detailed “the activities which both Government and industry are committed to delivering over the next five years in order to accelerate UK export growth and boost the confidence and ambition of those wishing to export”.⁶⁷ The Government’s ambition was to raise “the value of UK exports by an additional £2.9 billion” over the five years, from £20.1 billion in 2016 to £23 billion in 2020.⁶⁸ The nine priority markets were: Australia and New Zealand; Mexico and Latin America; France; Germany;

64 Quality Meat Scotland (QMS) ([BFD0036](#)), para 3

65 VisitBritain, ‘[Structure of tourism in Britain](#)’, accessed June 2019

66 Department of Business, Energy and Industrial Strategy, [UK Food and Drink - International Action Plan 2016–2020](#), (October 2016)

67 Department of Business, Energy and Industrial Strategy, [UK Food and Drink - International Action Plan 2016–2020](#), (October 2016), p 2

68 Department of Business, Energy and Industrial Strategy, [UK Food and Drink - International Action Plan 2016–2020](#), (October 2016), p 6; Government Communication Service, ‘[Congratulations to DEFRA for winning Campaign of the Month](#)’, August 2018

India; Japan; USA and Canada, China; and UAE and Gulf.⁶⁹ Despite these ambitions, the FDF told us that “only 50 per cent of active food and drink exporters were aware of this plan”.⁷⁰

27. In 2017, “Defra, working in collaboration with the Department for International Trade (DIT), VisitBritain and the Foreign and Commonwealth Office (FCO), developed the stand-alone Food is GREAT campaign to underpin the IAP and raise the profile of the UK’s excellent food and drink exports”.⁷¹ Defra explained that “the campaign had a budget of £1.25m in 2017/18, rising to £1.5m in 2018/9”.⁷² Focusing on China and the USA in its first year, the main objectives of the Food is GREAT Campaign were to:

- a) Build global demand for UK food and drink among international businesses in key markets;
- b) Build global awareness and demand for UK food and drink among international consumers in key markets; and
- c) Increase export ambition among UK food and drink businesses.⁷³

Activities included the development of a “Food is GREAT hospitality toolkit which is shared with the British embassy network worldwide”, working “with public and private stakeholders to promote UK produce overseas” and the use of “high-impact content and materials to promote UK food and drink internationally”, including films and infographics.⁷⁴

28. Dairy UK considered that “the Government needs to project a clear brand image of UK food and drink as a whole” and the GREAT campaign “provides a useful foundation from which companies can promote their own individual brands”.⁷⁵ Sandra Sullivan from the Food and Drink Exporters Association (FDEA) explained that its members “typically are companies that are exporting branded products” which “would be sold into multiple retailers in a high quality premium market”, making it “really important that there is promotion in those markets to raise awareness of Britain and to sell our qualities”.⁷⁶ She considered that “things like the GREAT campaign are very good at getting general awareness of Britain out there” but added that “what we have to do within the food industry is to make sure that we are really pushing the quality, the safety and the traceability of our food so that we become first choice for a lot of these markets as they become more affluent”.⁷⁷ The Provision Trade Federation, an industry body representing processors and traders in a range of staple dairy, meat and fishery products, stated that the campaign:

does provide an effective vehicle for promoting generic British foods and drink though it should only be utilised when it is appropriate to increase confidence in British produce. Generic marketing will never replace

69 Department of Business, Energy and Industrial Strategy, *UK Food and Drink - International Action Plan 2016–2020*, (October 2016), pp 6–8

70 Food and Drink Federation ([BFD0021](#)), para 6

71 Defra ([BFD0038](#)), para 1

72 Defra ([BFD0038](#)), para 1

73 Defra ([BFD0038](#)), para 1

74 Defra ([BFD0038](#)), para 2

75 DAIRY UK ([BFD0027](#)), para 5

76 [Q7](#)

77 [Q7](#)

targeted marketing, branding and advertising and as such this campaign will only ever raise general awareness rather than increase specific sales. The responsibility for this lies with commercial companies.⁷⁸

29. We asked Graham Stuart MP, Minister for Investment at the Department for International Trade (DIT), whether the Government would meet its ambitions to increase food exports by £2.9 billion by 2020, from £20.1 billion in 2016 to £23 billion 2020.⁷⁹ He stated that “we are at £22.5 billion, I think, in the latest numbers”.⁸⁰ He added that “food and drink is one of the areas where there is the greatest potential” but “it is fragmented and it is dominated by SMEs, which creates barriers”.⁸¹ Export support for SMEs is addressed in the next chapter.

30. We are satisfied that the Government is on track to meet its target to increase food exports to £23 billion by 2020. However, £23 billion was a modest target. *The UK Food and Drink International Action Plan (IAP) 2016–2020 should be reviewed and updated immediately, with a new plan published for 2021–2025. We consider that a key focus of the next IAP should be on improving export activities of SMEs. The next IAP should be accompanied by a more ambitious target for the value of food exports.*

Assurance schemes

31. We were interested in the role of assurance schemes, such as Red Tractor, in marketing and promoting British food abroad. Phil Hadley, International Market Development Director, AHDB, pointed out that Red Tractor “has been a domestic marketing tool”.⁸² It is therefore unsurprising that “foreign markets are unfamiliar with the Red Tractor as a brand and the concept of an assurance scheme is not widely understood”.⁸³ However, the NFU considered that “both organic dairy and Red Tractor dairy resonate with consumers in third countries” and that “Red Tractor independent assurance is a strong asset in China, for example, where there is big appetite for fresh dairy products”.⁸⁴ Dairy UK cautioned that “care has to be taken to ensure that Red Tractor standards are sufficiently high to be promoted in certain markets” that might have “comparable or even higher standards”.⁸⁵ Ray Smith, Agriculture, Food and Drink Counsellor, British Embassy Beijing, stated that:

There is definitely space for a standard that the Chinese would see as being a recognised standard for safety. Whether that is Red Tractor is a wider question. I do not think Red Tractor is currently known in China and you may be better off working with Chinese authorities to create a standard that fits with what China is looking for on food safety, and then bringing that in as a new standard, which is introduced with a logo that is recognised for China and resonates with China.⁸⁶

78 Provision Trade Federation ([BFD0043](#)), para 17

79 Government Communication Service, ‘[Congratulations to DEFRA for winning Campaign of the Month](#)’, August 2018

80 [Q307](#)

81 [Q308](#)

82 [Q240](#) [Dr Phil Hadley]

83 DAIRY UK ([BFD0027](#)), para 26

84 National Farmers’ Union ([BFD0016](#)), para 18

85 DAIRY UK ([BFD0027](#)), para 27

86 [Q175](#)

32. Phil Hadley was concerned that “one single logo across the globe might not achieve maximum objectives in multiple individual countries” and suggested that “if the decision were made for Red Tractor to move towards more international markets, they would have to pick the markets in which they wanted to be present [and] road test some mock-ups of what a logo would look like to see if it had presence”.⁸⁷

33. Defra told us last year that it had “started exploring what a Gold Standard for food and farming quality might deliver, including how it could acknowledge the full range of assurance schemes available to producers and consumers to meet their needs”.⁸⁸ It added that “a key area of this work will be looking at how the standard can drive exports to new markets”.⁸⁹ The Food Minister explained that:

there are multiple layers in which people want to look at assurance and look at labelling. What we are doing is carrying out some work to try to create an architecture or a framework with common metrics, so that can then either provide focus for something that we take forward within Defra or, more likely, we can use working in collaboration with existing or new assurance schemes with other third parties and other stakeholders, to create a more joined-up landscape of assurance. This is a very important and in-depth piece of work about trying to get to grips with what those metrics should be.⁹⁰

34. The Food Minister praised Red Tractor for standing “high in international benchmarking and [...] setting world-leading standards” but was non-committal over Red Tractor’s potential role in the Government’s wider export strategy.⁹¹

35. Red Tractor appears to be working well as a domestic assurance scheme, but consideration needs to be given to whether this assurance scheme could be used to promote British products overseas. The Government should explore a variety of different options to effectively promote British food and drink overseas. A “one size fits all” approach will not work across different countries.

36. Defra told us a year ago that it was working on a “gold standard” for food and farming quality. Although Brexit preparations have understandably delayed much of Defra’s work, we are nonetheless disappointed that little progress appears to have been made on this, given the importance of increasing UK exports to the Government’s economic and trade strategy post-Brexit. *The current deadline for EU Exit is 31 October. By December 2019, Defra should provide us with a detailed update on the development of the “gold standard” including what metrics it would be based on. We would like to see greater collaboration between Defra, AHDB, Red Tractor, other assurance schemes and other food and drink organisations to promote British products overseas.*

Geographical Indications

37. Geographical Indications (GIs) are used to identify a product as originating in the territory of a particular country, region or locality where its quality, reputation or other

87 [Q243](#)

88 Defra ([BFD0038](#)), para 8

89 Defra ([BFD0038](#)), para 8

90 [Q283](#)

91 [Q284](#)

characteristic is linked to its geographical origin.⁹² The AHDB stated that “agricultural producers in the EU can use Geographical Indications (GIs) to try to differentiate their products in domestic and international markets to help improve their competitiveness and profitability” and that “once registered at European level, a named food or drink originating either from the EU or outside the EU will be given legal protection against imitation throughout the EU”.⁹³ The AHDB explained that the three protected schemes are:

- a) Protected Designation of Origin (PDO), which must be produced, processed and prepared in one defined area and have distinct characteristics from this area (for example, the distinctive taste of Stilton Cheese is attributed to the climatic and geographical conditions of a defined area in the East Midlands⁹⁴);
- b) Protected Geographical Indication (PGI), for example West Country Beef and West Country Lamb PGIs, which identifies a product originating in a specific place, region or country; and
- c) Traditional Speciality Guaranteed (TSG), for example Traditionally Farmed Gloucestershire Old Spot Pork TSG. TSG refers to a specific product or foodstuff that results from a mode of production, processing or composition corresponding to traditional practice.⁹⁵

The UK currently has over 80 registered products under the protected food name scheme.⁹⁶

38. The FDEA stated that “PGI’s and PDO’s are not well understood by the majority of UK consumers other than by a certain group of knowledgeable consumers where they are both understood and valued” but “they are recognised by many consumers in EU markets where the marks are much more widely used”.⁹⁷ The NFU agreed that “they are generally more prevalent and familiar to consumers overseas, especially in mainland Europe”.⁹⁸ Hybu Cig Cymru (Meat Promotion Wales) highlighted the price premium whereby “products carrying a Protected Food Name/ Geographical Indication designation were sold in the EU at a price 2.23 times higher than products not carrying such designations”.⁹⁹ In contrast, for UK consumers, “while some evidence suggests consumers consider origin labelling, other factors such as price and product quality are known to have a greater impact on consumer purchasing decisions” (see previous chapter for more).¹⁰⁰

39. Scotch whisky is the UK’s biggest export in the food and drink category.¹⁰¹ The Scotch Whisky Association considered it “vital that in time for the UK’s exit from the EU, a framework for GIs has been established”, adding “if the UK does not adopt a similar

92 The Scottish Parliament Information Centre, [Geographical Indications and Brexit](#), (August 2018), executive summary

93 Agriculture and Horticulture Development Board ([BFD0013](#)), paras 30–31

94 Department for Environment, Food and Rural Affairs, [PRODUCT SPECIFICATION: Stilton Cheese](#), accessed June 2019

95 Agriculture and Horticulture Development Board ([BFD0013](#)), para 32

96 Department for Environment, Food and Rural Affairs, [‘Protected food name scheme: UK registered products’](#), accessed June 2019

97 Food & Drink Exporters Association ([BFD0009](#)), para 6

98 National Farmers’ Union ([BFD0016](#)), para 32

99 Hybu Cig Cymru - Meat Promotion Wales ([BFD0025](#)), para 2.6

100 Defra ([BFD0038](#)), para 6

101 Food and Drink Federation, [‘Exports snapshot Q4 2018’](#), accessed June 2019

framework to that set out in EU law, Scotch Whisky, for example, would lose the very wide protection [...] which ensures that Scotch Whisky is protected from direct or indirect use that exploits its reputation”.¹⁰²

40. The National Pig Association (NPA) pointed out that “if the UK wants to register protected food names with the EU post-Brexit, it would first need to establish its own national approval scheme” which could then “be considered for approval under the EU protected food scheme”.¹⁰³ According to the AHDB, “these products would also be protected by countries which have a Free Trade Agreements (FTAs) or bilateral agreement with the EU”.¹⁰⁴ There are currently 23 EU GI product registrations from non-EU countries and 1544 GIs or equivalents (such as trademarks) from non-EU countries protected in the EU under bilateral agreements.¹⁰⁵

41. Defra stated that “GIs are included in many of the EU’s Free Trade Agreements and other sectoral agreements” and that “there is a cross-Government programme of work to transition these agreements in order to maintain continuity in existing trade arrangements”.¹⁰⁶ Defra intended to “use the EU (Withdrawal) Bill to incorporate relevant EU legislation into domestic law, providing the legal means to protect GIs in the UK after exit”.¹⁰⁷ The Withdrawal Agreement, which was rejected by the House, included “the protection of existing intellectual property rights including geographical indications”.¹⁰⁸

42. In the event of a no-deal Brexit, when the UK would leave the EU without a withdrawal agreement in place, the UK would “set up its own GI schemes” which would “mirror the EU schemes”.¹⁰⁹ All existing UK products registered under EU GI schemes would “automatically get UK GI status and will remain protected in the UK” and Defra would “publish guidance on how to apply to the UK GI schemes in October 2019”.¹¹⁰ We asked the Food Minister whether the EU would continue to protect UK GIs following a no-deal Brexit and he told us that his “understanding is that as far as the EU goes, for a period of time at least our GIs would be recognised by the EU”.¹¹¹ The Investment Minister was “fairly confident the mutual benefit on either side would mean we would see that maintenance”.¹¹²

43. Geographical Indications (GIs) provide legal protection against unlawful imitation of protected food and drink products. GIs confer a price premium on products and therefore they are economically important as well as being a recognised indicator of origin. Given the UK’s relative strength in high-value food and drink exports, maintaining the protections that GIs provide in major international markets is a priority for the Government. This is reflected by the inclusion of GIs in the Withdrawal Agreement negotiated with the EU.

102 The Scotch Whisky Association ([BFD0004](#)), para 11

103 National Pig Association ([BFD0023](#)), para 6

104 Agriculture and Horticulture Development Board ([BFD0013](#)), para 36

105 Agriculture and Horticulture Development Board ([BFD0013](#)), para 36; European Commission, [GIs from non-EU countries protected in the EU under bilateral agreements](#), (April 2019)

106 Defra ([BFD0038](#)), para 6

107 Defra ([BFD0038](#)), para 6

108 European Commission, ‘[Brexit Negotiations: What is in the Withdrawal Agreement](#)’, November 2018

109 Department for Environment, Food and Rural Affairs, [Protecting food and drink names if there’s no Brexit deal](#), (February 2019)

110 Department for Environment, Food and Rural Affairs, [Protecting food and drink names if there’s no Brexit deal](#), (February 2019)

111 [Q302](#)

112 [Q304](#)

44. **The Government is optimistic that the EU will continue to recognise UK GIs in the event of a no-deal Brexit, given the mutual benefit, but there is no guarantee. Therefore, there is no room for complacency. *Given the potential for the UK to leave the EU without a deal in October, the Government should ensure that the domestic GI system meets the criteria required for EU approval and is ready prior to exit, to minimise disruption to British exporters. It should prioritise seeking a reciprocal agreement with the EU on GIs if agreeing an overarching withdrawal agreement is not possible.***

3 Export support

45. There was a widely held view that the UK does not fully develop export opportunities. The AHDB stated that UK Government investment was “not of the scale of countries such as the USA and Ireland who deliver coordinated marketing activities funded by Government to develop export and international opportunities”.¹¹³ The NFU stated that “it’s widely accepted that the UK is typically behind the curve in exploring and developing export potential, for instance when compared to Ireland”.¹¹⁴ Jeff Grant, Red Meat Sector Representative, Beef and Lamb New Zealand and New Zealand Meat Industry Association, explained that:

in New Zealand, we have shifted over the last 30 years to outcome-based proposals. Whereas, before, it would have been a directive from the Government on expenditure or direction, it is now a partnership between the industry and the Government in what we do. [...] The marketing area, for example, is driven by the private sector, so the exporting companies do that.¹¹⁵

46. The FDF highlighted that “more than half of the total value of UK food and drink exports is produced by just 1 per cent of exporting companies, while SMEs currently make up 37 per cent of the total value of UK food and drink exports”.¹¹⁶ It considered that “significant value growth in our sector’s exports can be delivered by enabling more SME businesses to begin exporting and by helping existing exporters to expand”.¹¹⁷ Exports “currently account for a small percentage of companies’ overall UK turnover at under 10 per cent” and “ONS data shows that fewer than one in five UK food and drink manufacturers actively export, just half that of the Republic of Ireland (40 per cent) and Spain (38 per cent)”.¹¹⁸

47. In 2017, Defra identified “perceived barriers to exporting for food and drink SMEs”, such as:

- a) Little intelligence on foreign markets;
- b) Anxieties about engaging with multiple regulatory frameworks;
- c) Language barriers;
- d) Capacity and finance/resource constraints;
- e) Apprehensions about the post-EU exit environment; and
- f) Access to joined-up exporting advice.¹¹⁹

113 Agriculture and Horticulture Development Board ([BFD0013](#)), para 6

114 National Farmers’ Union ([BFD0016](#)), para 9

115 [Q213](#)

116 Food and Drink Federation ([BFD0021](#)), para 13

117 Food and Drink Federation ([BFD0021](#)), para 16

118 Food and Drink Federation ([BFD0021](#)), para 13

119 Defra ([BFD0038](#)), para 3

The Provision Trade Federation highlighted that “small and medium companies tend to concentrate on value-added, high quality end products” and “these companies are the ones that often require most support and guidance because they do not have access the global export resources that larger companies do”.¹²⁰ The FDEA stated that:

Many of the top UK food producers have long standing relationships with the UK retailers. They have dedicated factories, product development teams, integrated IT systems and distribution channels to deliver ‘just in time’. It is very difficult to persuade these companies to take the step into the unknown, and difficult for their management teams to convince investors to risk their cash.¹²¹

48. Disparities in regional support across England were highlighted by Sandra Sullivan from the FDEA, who explained that “there is a lot of advice and knowledge that needs to get out to these companies to give them the confidence to be able to export” and argued that:

Scotland, Wales and Northern Ireland all have very strong national promotional events and plans around food and drink. England is dependent on which region you happen to be in. Some of those have ERDF [European Regional Development Fund] funding. The south-west at the moment, for example, has ERDF funding [...]. Therefore, the companies in those regions are getting more financial support in terms of getting them export ready. Having something that is more of a level playing field across the country would be a good starting point.¹²²

49. Sandra Sullivan considered that, post Brexit, there should be a national scheme across England, rather than the current “postcode lottery”.¹²³ The Food and Drink Federation (FDF) agreed that “provision of specialist food and drink export support is highly fragmented” and added that “Scottish companies informed us that they typically receive additional support in the form of funding, networking opportunities and meet the buyer events as a result of the priority given to food and drink by the Scottish Government, which provides strong backing to Scotland Food & Drink”.¹²⁴ The FDF has, through its proposed Sector Deal, suggested creating a “Food and Drink Export Portal” website to:

- a) signpost existing Government and private sector export information and support;
- b) promote DIT export opportunities;
- c) highlight Government and private sector missions/events;
- d) promote sector-specific guidance; and
- e) build a directory of exporters to inform export support and priorities.¹²⁵

120 Provision Trade Federation ([BFD0043](#)), para 12

121 Food & Drink Exporters Association ([BFD0009](#)), para 3

122 [Q19](#)

123 [Q21](#)

124 Food and Drink Federation ([BFD0021](#)), para 20

125 Food and Drink Federation ([BFD0021](#)), para 26

50. Between 2014–2018, 47 per cent of ERDF funding went towards enhancing the competitiveness of SMEs, equating to £655 million.¹²⁶ The Government is expected to publish a consultation on the UK Shared Prosperity Fund, which would replace EU structural funding (including the ERDF) after Brexit.¹²⁷ The Government has stated that “final decisions on UK Shared Prosperity Fund will be made during Spending Review”, due in autumn 2019.¹²⁸ Defra’s March 2019 guidance on *European Regional Development Funding (ERDF) in a ‘no deal’ Brexit* stated that “the draft Withdrawal Agreement [...] would mean that the UK would continue to participate in the European Regional Development programmes until programmes end in 2023”.¹²⁹ In the event of a no-deal Brexit, the Government would “guarantee certain EU projects agreed before we leave the EU”, including ERDF projects and all projects “that would have been funded by the EU under the 2014–2020 programme period”.¹³⁰ The Investment Minister told us that “DIT is planning that from 2020, [...] ERDF co-investment funding for high-growth SMEs will be provided through an internationalisation fund”.¹³¹

51. Improving export support for businesses is vital for improving the marketing and promotion of British food and drink more widely. The current postcode lottery of regional support for companies in England that wish to start or increase exporting is undesirable. We commend the initiative shown by the industry to improve this through the proposed Food and Drink Manufacturing Sector Deal proposal. This must, however, be underpinned by Government strategy. *The Government should publish its consultation on the Shared Prosperity Fund. The consultation should include proposals on enhancing the competitiveness of SMEs, with a sectoral breakdown, including the food and drink manufacturing sector. In designing new support for English companies, the UK Government should examine what it can learn from the support provided by the Devolved Governments to SMEs in their nations.*

Tradeshaw Access Programme

52. The Government’s Tradeshaw Access Programme (TAP) provides grant funding for eligible UK businesses towards the costs of exhibiting at overseas trade shows.¹³² Each year, the Department for International Trade (DIT), with the relevant TAP trade challenge partners (for example, the FDEA), agrees which overseas trade shows they will support UK businesses to attend.¹³³ Individual organisations may receive a maximum of six grants in total.¹³⁴ Grant levels are between £500 and £2500 and “must not exceed the business’s own expenditure on direct exhibiting costs”.¹³⁵ The eligibility criteria changed from April 2019, so that in order to qualify for a grant, an organisation must be either:

126 *The UK Shared Prosperity Fund*, [Briefing paper 08527](#), House of Commons Library, May 2019, p 6

127 *The UK Shared Prosperity Fund*, [Briefing paper 08527](#), House of Commons Library, May 2019, p 6

128 [PQ 214087](#) [on UK Shared Prosperity Fund], 29 January 2019

129 Department for Business, Energy and Industrial Strategy, ‘[European Regional Development Funding if there’s no Brexit deal](#)’, accessed June 2019

130 Department for Environment, Food and Rural Affairs, ‘[European Regional Development Funding \(ERDF\) in a ‘no deal’ Brexit](#)’, March 2019

131 [Q334](#)

132 Department for International Trade, ‘[Tradeshaw Access Programme \(TAP\)](#)’, May 2019

133 Department for International Trade, ‘[Tradeshaw Access Programme \(TAP\)](#)’, May 2019

134 Department for International Trade, ‘[Tradeshaw Access Programme \(TAP\)](#)’, May 2019

135 Department for International Trade, ‘[Tradeshaw Access Programme \(TAP\)](#)’, May 2019

- a) a small or medium-sized enterprise (SME) which is defined as an entity engaged in economic activity with less than 250 employees, and an annual turnover not exceeding €50 million or an annual balance sheet total not exceeding €43 million; or
- b) a business or organisation with less than 250 employees and an annual turnover of between £83,000 and £5 million (the Government aims to have at 75–85% of participants in this category across the 2019 to 2020 programme of TAP-supported events); or
- c) a UK university, UK government funded centre of higher or further learning or UK government funded research organisation.¹³⁶

53. The National Pig Association stated that the TAP was “the single most successful scheme for small and medium scale enterprises to break into new markets” and recommended that “support for this scheme should be increased and the rules on the number of shows that companies can attend should be reviewed”.¹³⁷ We asked Sandra Sullivan, FDEA, whether the TAP provided enough funding and attendance opportunities for businesses and she responded “no is the simple answer”.¹³⁸ She highlighted that:

the TAP scheme years ago was more generous [...] In 2002, as far back as my records go, I think the TAP budget was £21 million. [...]. It is now more restrictive. You used to be able to get six supported participations at European shows and then six in developing markets. That has been taken away and I think that has had a very negative effect on getting people out to these markets where the new growth opportunities are. They are using up their lifelines quite quickly at the major European shows and then do not really have that incentive to go out and take a look at some of the new markets.¹³⁹

54. We asked the Investment Minister whether funding for the TAP scheme had declined. He told us the Government had tried to “make sure it is as focused as possible on its primary purpose, which is to get people going into it” and that “what we did not want to do is find we were funding the same people who managed to tap into it”.¹⁴⁰ He acknowledged that restrictions had “upset some people” but considered that “we have to strike a balance and [...] most people seem to be supportive”.¹⁴¹ He added that “the 2018–19 total TAP programme is forecast to support 317 events and provide 3,338 grants to SME businesses”.¹⁴² Figures subsequently shared with us by the Government showed that the budget for the TAP scheme has significantly reduced since 2014 and has been underspent every year:

136 Department for International Trade, ‘[Tradeshaw Access Programme \(TAP\)](#)’, May 2019

137 National Pig Association ([BFD0023](#)), para 4

138 [Q58](#)

139 [Q58](#)

140 [Q336](#)

141 [Q336](#)

142 [Q337](#)

Table 1: Tradeshow Access Programme (TAP) funding between 2014–2019¹⁴³

Year	TAP Budget £m	TAP spend £m	Food & Drink TAP spend £k
2014–15	11.3	11	546
2015–16	10	9	472
2016–17	8.1	7.7	399
2017–18	7.5	6.5	311
2018–19	6.5	6.4	277
2019–20	6.5	-	-

The Government explained that “the core programme is agreed in consultation with stakeholders and ensures the right mix of events and attendees is selected to deliver the best value for UK business and the taxpayer and aligns with the Department’s objectives”.¹⁴⁴

55. Getting out to international trade shows is crucial to promoting British food and drink abroad. The Tradeshow Access Programme (TAP) is seen by industry as an important way for companies, particularly SMEs, to promote their businesses and break into new markets. We accept that there may have been satisfactory reasons for the budget to have declined slightly until 2016. However, following the EU referendum, the Government should have anticipated the increased necessity for British businesses to access and promote themselves to new markets. Instead, TAP spend on food and drink has declined by 10 per cent since 2017/18, as part of an ongoing trend of decreased funding. Opportunities for companies to access grants have become more restrictive, although we welcome the increased focus on SME participation.

56. Given the Government’s export ambitions, the Tradeshow Access Programme should be reviewed urgently, in consultation with industry and trade associations. Funding should be reviewed and potentially increased as part of the upcoming Spending Review.

57. In its response to our Report, the Government should explain why the TAP budget has been underspent every year since 2014/15, particularly when the number of grants available per company have also decreased.

In-market specialist support

58. In January 2015, the Government appointed Karen Morgan as the UK’s first Agriculture and Food Counsellor in China to “help increase our growing food and drink exports to the country”.¹⁴⁵ The role was designed to “help British firms tap into China’s growing interest in speciality foods - a market expected to be worth a potential £39 billion [in 2015]”.¹⁴⁶ Karen Morgan has since been replaced by Ray Smith.

143 David Rutley and Graham Stuart ([BFD0049](#)), para 3

144 David Rutley and Graham Stuart ([BFD0049](#)), para 3

145 Department of Environment, Food and Rural Affairs and Agriculture and Horticulture Development Board, ‘[UK appoints first Agriculture and Food Counsellor in China](#)’, January 2015

146 Department of Environment, Food and Rural Affairs and Agriculture and Horticulture Development Board, ‘[UK appoints first Agriculture and Food Counsellor in China](#)’, January 2015

59. We found widespread support for the Agriculture and Food Counsellor, which was described as “an excellent example of how it is a positive, helpful thing to have somebody on the ground”.¹⁴⁷ Katie Doherty, Policy Director of the International Meat Trade Association, gave examples of impact:

when there have been media stories in the UK that might say something about UK food and it has not necessarily been true, then she has been able to go in and talk to officials and say what the facts are, to make sure that the UK brand is not hit by that. [...] Where there might be certain import conditions, she would be able to go in and talk to the authorities over there to understand better. She plays a role in facilitating some of the inward inspections that China has over in the UK, so it is a conduit and facilitation role and that is very beneficial.¹⁴⁸

60. The food and drink industry was keen to see the numbers of such specialists increased. The Food and Drink Manufacturing Sector Deal proposed “actions that would work together to enhance export volumes and values for business of all sizes” including “Market Access Assistance to put in place food and drink sector specialists in markets that offer the greatest opportunity for growth but are difficult markets for businesses to access”.¹⁴⁹ The FDF suggested that “initial priority markets would be China, India, Japan, USA and UAE and could be based on a similar model to the existing [Defra and AHDB] one in China”.¹⁵⁰

61. Ray Smith explained that Karen Morgan’s initial task “was to set up a team and start the process of market access” and that her job was “to carry on the good work that she has been doing and to grow the Chinese understanding of the UK offer and the different products that we would like to export to China”.¹⁵¹ She confirmed that “AHDB funds 90% of [her] posting”.¹⁵² When we asked whether the Government should increase the number of agriculture, food and drink counsellors overseas, she replied that:

Every country is different. China is a very complicated regulatory framework and there is a lot of merit in having a UK diplomat to open the door. I have a very capable, locally engaged Chinese team, which does most of the work, but when it comes to getting in at a high enough level I need to be present in the room. That may not necessarily be the case in other countries, so you may not need someone from the UK to be the representative for agriculture, food and drink. While you may need a named person, they do not necessarily need to be a UK diplomat.¹⁵³

62. Phil Hadley, AHDB, agreed that the role “would be tailored to suit the individual countries, because of the complexities and challenges that each country offers”.¹⁵⁴ He stated that AHDB broadly supported “the countries that have been identified for ag counsellors”

147 [Q16](#) [Katie Doherty]

148 [Qq27-28](#)

149 Food and Drink Federation, ‘[Food and Drink Manufacturing Sector Deal Proposal](#)’, accessed June 2019

150 Food and Drink Federation, ‘[Food and Drink Manufacturing Sector Deal Proposal](#)’, accessed June 2019

151 [Q168](#)

152 [Q180](#)

153 [Q177](#)

154 [Q207](#)

by the FDF but added that “the FDF proposal is broader, so we have to recognise that some of those positions are in markets that might have a great opportunity for UK plc, but not necessarily for our raw agricultural commodities”.¹⁵⁵

63. Ray Smith highlighted that “AHDB members know that we exist” because she worked “closely with AHDB at trade conferences, and we keep each other apprised of what is going on in the Chinese market”.¹⁵⁶ However, she explained that there was a wider lack of awareness of her role:

The problem is not with the exporters of commodities like pork; it is more with the SMEs that are new to exporting and do not know where to go for support and help. Often those companies are surprised when we come to a trade show and say, “Did you know you can come to us for this advice and that advice?” They have no idea that a team in the embassy exists to support them and give them that advice. [...] Most people think embassies are just about visas.¹⁵⁷

64. We asked the Government whether it would accept the proposed Sector Deal, which suggested increasing the number of food and drink specialists in key markets. The Investment Minister stated that Government was “supportive of it” and “want to see it happen”.¹⁵⁸ The Food Minister was unable to specify a timescale, stating that “the negotiations are ongoing but they have been slowed because the focus in the industry and across Departments has been on EU exit”.¹⁵⁹ The Investment Minister explained that “we are not waiting for the sector deal to get on with certain other things” and that:

We are seeking to improve in-market support in other regions. The Government are boosting our overseas network of posts focusing on agriculture, environment, fisheries and trade negotiations, with four posts spread across Canberra, Ottawa, Wellington and Tokyo. As a result of ongoing support from DIT and Defra working together, DIT Dubai will access regional FCO funding to recruit an agriculture, food and drink counsellor for the Gulf region.¹⁶⁰

65. Having a dedicated food and agriculture specialist on the ground in China has proved to be helpful for market access and maintaining ongoing dialogue about British food and drink. Diplomatic and trade relationships are built over time and we therefore expect this presence in China to continue. We are satisfied that the Government is taking action to increase the numbers of such specialists in other key markets.

66. Currently, the AHDB funds 90 per cent of the Food and Agriculture Counsellor in China. This has led to useful synergies, but, as the AHDB is a levy-funded organisation, this means the role is essentially funded by British food and farming businesses with a focus on raw agricultural commodities. However, the UK’s strengths also lie in

155 [Qq205–206](#)

156 [Q180](#)

157 [Q180](#)

158 [Q316](#)

159 [Q316](#)

160 [Q319](#)

exporting value-added and branded products. *Although the AHDB should continue to provide some funding, we recommend that Food and Agriculture Counsellors in other markets are co-funded by the Government and the wider food and drink industry.*

67. Unfortunately, too few British exporters know about the work of the Food and Agriculture Counsellor in China, aside from AHDB members. *As well as increasing the numbers of counsellors, the Government should ensure that their existence is better communicated, particularly to SMEs. As a minimum, the counsellors should be identified on each embassy's website and the new export portal proposed under the Sector Deal. They should also regularly participate in UK food and drink industry events and conferences.*

4 Future strategy

68. In autumn 2018, Defra began a review of the AHDB, seeking views on the “continuing need for AHDB and the statutory levy, and what the levy board should deliver”.¹⁶¹ AHDB “raises about £60 million per year in statutory levies, and levy raised from one sector can only be spent for the benefit of that sector”.¹⁶² The sectors that contribute the highest amount to the levy are beef and lamb in England¹⁶³ (£16.7 million) and cereals and oilseeds in the UK (£12.7 million).¹⁶⁴ The consultation for the AHDB review closed in November 2018 and a summary of responses was expected in early 2019.¹⁶⁵ Phil Hadley, AHDB, considered that “the focus is on Brexit discussions and, as a result, it has been delayed”.¹⁶⁶ When we asked the Food Minister about the review, he stated that his “understanding is that there is more work to be done”.¹⁶⁷ **The AHDB conducts market research and promotes British food and its efforts are split across domestic and international markets. This is welcome, but also ambitious. *The current review of the AHDB should consider whether the balance of funding between domestic and international market intelligence and promotion is fit for the future and meets the needs of levy payers. AHDB should assess if more needs to be done to promote to the domestic market. Furthermore, the Government should also consider the case for splitting responsibility for promoting to the domestic market from that for the overseas market, so these two, different, important markets are not competing for resources from the same pot.***

69. The proposed Food and Drink Manufacturing Sector Deal would address many of the concerns raised during our inquiry, and the proposed actions to improve exports (a food and drink export portal, market research unit and in-market specialists) were supported by the evidence we received.¹⁶⁸ **Brexit makes it important for the UK to access new markets for food and drink as well as maintain trade with existing countries and the EU. While progress is being made in some areas, we are concerned that the Government is not being ambitious or strategic enough in its approach to marketing and export activities. Market access and increasing exports do not happen overnight, and more action must be taken urgently. The food and drink industry has recognised what needs to be done to increase export activities. *The Government should approve the Food and Drink Manufacturing Sector Deal immediately and confirm a timetable for its implementation.***

161 Department for Environment, Food and Rural Affairs, [‘Request for Views on the Agriculture and Horticulture Development Board’](#), accessed June 2019

162 Department for Environment, Food and Rural Affairs, [Request for Views on the Agriculture and Horticulture Development Board](#), (August 2018), p 5; the AHDB also receives an additional £10 million from EU grants, fees for services and from its commercial subsidiary, Meat and Livestock Commercial Services Ltd.

163 Outside England, the development, promotion and marketing of red meat is the responsibility of Quality Meat Scotland (QMS), Hybu Cig Cymru/Meat Promotion Wales (HCC) and the Livestock and Meat Commission for Northern Ireland (LMC).

164 Department for Environment, Food and Rural Affairs, [Request for Views on the Agriculture and Horticulture Development Board](#), (August 2018), p 6

165 Department for Environment, Food and Rural Affairs, [‘Request for Views on the Agriculture and Horticulture Development Board’](#), accessed June 2019

166 [Q192](#)

167 [Q329](#)

168 Food and Drink Federation, [‘Food and Drink Manufacturing Sector Deal Proposal’](#), accessed June 2019

Conclusions and recommendations

British consumers

1. Research shows that origin is important to some British consumers, but purchasing behaviour is primarily driven by price. (Paragraph 7)
2. *The Government should introduce requirements for the origin of characterising ingredients in food products to be specified on labels. This would enable consumers to make informed choices.* (Paragraph 10)
3. *The Government should explore the potential of blockchain and similar technology to increase transparency and traceability in the food supply chain. This could be useful for consumers when buying food and drink products with multiple ingredients and where ingredients may have crossed international borders during processing.* (Paragraph 11)
4. Red Tractor provides an assurance for British consumers about the traceability and British origin of meat and poultry. *Some efforts have been made by Red Tractor to increase consumer awareness of the underlying standards and these promotional activities should continue. We suggest that Red Tractor should also assess the impact of its logo and further promotional activities on actual purchasing behaviour rather than just consumer surveys.* (Paragraph 17)

International markets

5. Research suggests that awareness of British food and drink is low in international markets. This provides an opportunity for improvement, particularly if promotion is tailored to the values of each market, for example emphasising the safety of British food in China. *More research should be done into some overseas markets to work out the best way to promote British products overseas and ensure greater exposure to British food.* (Paragraph 23)
6. International market research to support exports is lacking, and this has been recognised by the Agriculture and Horticulture Development Board (AHDB) and industry. We commend the efforts of the AHDB in increasing its focus on international market intelligence and support the Food and Drink Federation's (FDF) proposed market research unit. Because the AHDB and FDF support different parts of the food and drink industry, these efforts should be complementary. However, this should not be taken as a given and it would be useful for businesses if market research was coordinated. *The Government and AHDB must work closely with the FDF to develop and support the new market research unit. The market research unit ought to provide insights to enable the Government and exporting businesses to promote and market British products more effectively.* (Paragraph 24)
7. More should be done to increase overseas consumer exposure to British food and drink. We recognise that this needs to be done sensitively and in a way that enables nations of the UK to retain their separate identities - as has been done with the tourist boards, VisitBritain, VisitEngland, VisitScotland and Visit Wales. (Paragraph 25)

8. We are satisfied that the Government is on track to meet its target to increase food exports to £23 billion by 2020. However, £23 billion was a modest target. *The UK Food and Drink International Action Plan (IAP) 2016–2020 should be reviewed and updated immediately, with a new plan published for 2021–2025. We consider that a key focus of the next IAP should be on improving export activities of SMEs. The next IAP should be accompanied by a more ambitious target for the value of food exports.* (Paragraph 30)
9. Red Tractor appears to be working well as a domestic assurance scheme, but consideration needs to be given to whether this assurance scheme could be used to promote British products overseas. The Government should explore a variety of different options to effectively promote British food and drink overseas. A “one size fits all” approach will not work across different countries. (Paragraph 35)
10. Defra told us a year ago that it was working on a “gold standard” for food and farming quality. Although Brexit preparations have understandably delayed much of Defra’s work, we are nonetheless disappointed that little progress appears to have been made on this, given the importance of increasing UK exports to the Government’s economic and trade strategy post-Brexit. *The current deadline for EU Exit is 31 October. By December 2019, Defra should provide us with a detailed update on the development of the “gold standard” including what metrics it would be based on. We would like to see greater collaboration between Defra, AHDB, Red Tractor, other assurance schemes and other food and drink organisations to promote British products overseas.* (Paragraph 36)
11. Geographical Indications (GIs) provide legal protection against unlawful imitation of protected food and drink products. GIs confer a price premium on products and therefore they are economically important as well as being a recognised indicator of origin. Given the UK’s relative strength in high-value food and drink exports, maintaining the protections that GIs provide in major international markets is a priority for the Government. This is reflected by the inclusion of GIs in the Withdrawal Agreement negotiated with the EU. (Paragraph 43)
12. The Government is optimistic that the EU will continue to recognise UK GIs in the event of a no-deal Brexit, given the mutual benefit, but there is no guarantee. Therefore, there is no room for complacency. *Given the potential for the UK to leave the EU without a deal in October, the Government should ensure that the domestic GI system meets the criteria required for EU approval and is ready prior to exit, to minimise disruption to British exporters. It should prioritise seeking a reciprocal agreement with the EU on GIs if agreeing an overarching withdrawal agreement is not possible.* (Paragraph 44)

Export support

13. Improving export support for businesses is vital for improving the marketing and promotion of British food and drink more widely. The current postcode lottery of regional support for companies in England that wish to start or increase exporting is undesirable. We commend the initiative shown by the industry to improve this through the proposed Food and Drink Manufacturing Sector Deal proposal. This must, however, be underpinned by Government strategy. *The Government*

should publish its consultation on the Shared Prosperity Fund. The consultation should include proposals on enhancing the competitiveness of SMEs, with a sectoral breakdown, including the food and drink manufacturing sector. In designing new support for English companies, the UK Government should examine what it can learn from the support provided by the Devolved Governments to SMEs in their nations. (Paragraph 51)

14. Getting out to international trade shows is crucial to promoting British food and drink abroad. The Tradeshow Access Programme (TAP) is seen by industry as an important way for companies, particularly SMEs, to promote their businesses and break into new markets. We accept that there may have been satisfactory reasons for the budget to have declined slightly until 2016. However, following the EU referendum, the Government should have anticipated the increased necessity for British businesses to access and promote themselves to new markets. Instead, TAP spend on food and drink has declined by 10 per cent since 2017/18, as part of an ongoing trend of decreased funding. Opportunities for companies to access grants have become more restrictive, although we welcome the increased focus on SME participation. (Paragraph 55)
15. *Given the Government's export ambitions, the Tradeshow Access Programme should be reviewed urgently, in consultation with industry and trade associations. Funding should be reviewed and potentially increased as part of the upcoming Spending Review.* (Paragraph 56)
16. *In its response to our Report, the Government should explain why the TAP budget has been underspent every year since 2014/15, particularly when the number of grants available per company have also decreased.* (Paragraph 57)
17. Having a dedicated food and agriculture specialist on the ground in China has proved to be helpful for market access and maintaining ongoing dialogue about British food and drink. Diplomatic and trade relationships are built over time and we therefore expect this presence in China to continue. We are satisfied that the Government is taking action to increase the numbers of such specialists in other key markets. (Paragraph 65)
18. Currently, the AHDB funds 90 per cent of the Food and Agriculture Counsellor in China. This has led to useful synergies, but, as the AHDB is a levy-funded organisation, this means the role is essentially funded by British food and farming businesses with a focus on raw agricultural commodities. However, the UK's strengths also lie in exporting value-added and branded products. *Although the AHDB should continue to provide some funding, we recommend that Food and Agriculture Counsellors in other markets are co-funded by the Government and the wider food and drink industry.* (Paragraph 66)
19. Unfortunately, too few British exporters know about the work of the Food and Agriculture Counsellor in China, aside from AHDB members. *As well as increasing the numbers of counsellors, the Government should ensure that their existence is better communicated, particularly to SMEs. As a minimum, the counsellors should*

be identified on each embassy's website and the new export portal proposed under the Sector Deal. They should also regularly participate in UK food and drink industry events and conferences. (Paragraph 67)

Future strategy

20. The AHDB conducts market research and promotes British food and its efforts are split across domestic and international markets. This is welcome, but also ambitious. *The current review of the AHDB should consider whether the balance of funding between domestic and international market intelligence and promotion is fit for the future and meets the needs of levy payers. AHDB should assess if more needs to be done to promote to the domestic market. Furthermore, the Government should also consider the case for splitting responsibility for promoting to the domestic market from that for the overseas market, so these two, different, important markets are not competing for resources from the same pot. (Paragraph 68)*
21. Brexit makes it important for the UK to access new markets for food and drink as well as maintain trade with existing countries and the EU. While progress is being made in some areas, we are concerned that the Government is not being ambitious or strategic enough in its approach to marketing and export activities. Market access and increasing exports do not happen overnight, and more action must be taken urgently. The food and drink industry has recognised what needs to be done to increase export activities. *The Government should approve the Food and Drink Manufacturing Sector Deal immediately and confirm a timetable for its implementation. (Paragraph 69)*

Formal minutes

Wednesday 19 June 2019

Members present:

Neil Parish, in the Chair

Mrs Sheryll Murray David Simpson

The following declarations of interest relating to the inquiry were made:

9 January 2019

David Simpson declared his family's interest in the beef, pork, lamb and chicken industry.

David Simpson repeated this declaration of interest on 23 January 2019.

13 February 2019

Julian Sturdy declared his interest as a barley grower for the domestic market.

6 March 2019

Dr Caroline Johnson declared her interest as the Parliamentary Private Secretary to Graham Stuart MP, Minister for Investment, Department for International Trade.

Draft Report (*Brand Britain: promoting British food and drink*) proposed by the Chair, brought up and read.

Ordered, That the draft Report be read a second time, paragraph by paragraph.

Paragraphs 1 to 69 read and agreed to.

Figure 1 agreed to.

Table 1 agreed to.

Summary agreed to.

Resolved, That the Report be the Fifteenth Report of the Committee to the House.

Ordered, That the Chair make the Report to the House.

Ordered, That embargoed copies of the Report be made available, in accordance with the provisions of Standing Order No. 134.

[Adjourned till Wednesday 26 June at 2.30 p.m.]

Witnesses

The following witnesses gave evidence. Transcripts can be viewed on the [inquiry publications page](#) of the Committee's website.

Wednesday 9 January 2019

Dagmar Droogsma, Director of Industry, Scotch Whisky Association, **Katie Doherty**, Policy Director, International Meat Trade Association, **Sandra Sullivan MBE**, Food and Drink Exporters Association, and **Lee Holdstock**, Trade Relations Manager, Soil Association

[Q1–95](#)

Wednesday 23 January 2019

Jim Moseley, Chief Executive Officer, Assured Foods/ Red Tractor, **Ruth Edge**, National Farmers Union, and **Dominic Goudie**, Policy Manager for Exports, Food and Drink Federation

[Q96–160](#)

Wednesday 13 February 2019

Ray Smith, Agriculture, Food and Drink Counsellor, British Embassy Beijing (via video link)

[Q161–185](#)

Dr Phil Hadley, International Market Development Director, Agriculture and Horticulture Development Board, **Jeff Grant**, Red Meat Sector Representative, Beef and Lamb New Zealand and New Zealand Meat Industry Association

[Q186–259](#)

Wednesday 6 March 2019

David Rutley MP, Parliamentary Under-Secretary of State for Food and Animal Welfare, and **Graham Stuart MP**, Parliamentary Under-Secretary of State (Department for International Trade)

[Q260–346](#)

Published written evidence

The following written evidence was received and can be viewed on the [inquiry publications page](#) of the Committee's website.

BFD numbers are generated by the evidence processing system and so may not be complete

- 1 Agriculture & Horticulture Development Board ([BFD0047](#))
- 2 Agriculture and Horticulture Development Board ([BFD0013](#))
- 3 Aldi UK ([BFD0031](#))
- 4 Arla Foods UK ([BFD0008](#))
- 5 British Beer and Pub Association ([BFD0030](#))
- 6 British Egg Industry Council ([BFD0022](#))
- 7 British Meat Processors Association ([BFD0035](#))
- 8 British Poultry Council ([BFD0034](#))
- 9 British Sugar ([BFD0041](#))
- 10 British Veterinary Association ([BFD0029](#))
- 11 Chartered Institute of Marketing ([BFD0024](#))
- 12 DAIRY UK ([BFD0027](#))
- 13 David Rutley and Graham Stuart ([BFD0049](#))
- 14 Defra ([BFD0038](#))
- 15 Department for Environment, Food and Rural Affairs ([BFD0048](#))
- 16 Dr Graham Birch ([BFD0005](#))
- 17 Dr. Nathan Abrams, Professor in Film, Bangor University ([BFD0039](#))
- 18 Export Certification Ltd - UEKCP ([BFD0032](#))
- 19 Farmwel ([BFD0001](#))
- 20 Food & Drink Exporters Association ([BFD0009](#))
- 21 Food and Drink Federation ([BFD0021](#))
- 22 Hybu Cig Cymru - Meat Promotion Wales ([BFD0025](#))
- 23 Invest Northern Ireland ([BFD0045](#))
- 24 Jos Haynes ([BFD0006](#))
- 25 Keep Scotland the Brand ([BFD0010](#))
- 26 Love British Food ([BFD0042](#))
- 27 Mr David Whannel ([BFD0012](#))
- 28 Mrs Evelyn Bell ([BFD0011](#))
- 29 Mrs Marion Mullan ([BFD0014](#))
- 30 Ms Fay Francis ([BFD0015](#))
- 31 National Beef Association ([BFD0026](#))
- 32 National Farmers' Union ([BFD0016](#))
- 33 National Pig Association ([BFD0023](#))

- 34 NFU Scotland ([BFD0017](#))
- 35 Peter Dunford ([BFD0033](#))
- 36 Provision Trade Federation ([BFD0043](#))
- 37 Quality Meat Scotland (QMS) ([BFD0036](#))
- 38 Rare Breeds Survival Trust ([BFD0020](#))
- 39 Red Tractor Assurance ([BFD0040](#))
- 40 Soil Association ([BFD0002](#))
- 41 The International Meat Trade Association ([BFD0003](#))
- 42 The Rookery ([BFD0018](#))
- 43 The Scotch Whisky Association ([BFD0004](#))
- 44 Thomas Jardine & Co ([BFD0007](#))
- 45 Traidcraft Exchange ([BFD0019](#))
- 46 Waitrose & Partners ([BFD0044](#))
- 47 Welsh Government ([BFD0046](#))
- 48 Wine & Spirit Trade Association ([BFD0028](#)).

List of Reports from the Committee during the current Parliament

All publications from the Committee are available on the [publications page](#) of the Committee's website. The reference number of the Government's response to each Report is printed in brackets after the HC printing number.

Session 2017–19

First Report	2 Sisters and Standards in Poultry Processing	HC 490
Second Report	Pre-Legislative Scrutiny of the draft Animal Welfare (Sentencing and Recognition of Sentience) Bill 2017	HC 709
Third Report	Brexit: Trade in Food	HC 348
Fourth Report	Improving air quality	HC 433
Fifth Report	Performance of the Rural Payments Agency	HC 887
Sixth Report	The future for food, farming and the environment	HC 870
Seventh Report	Fur trade in the UK	HC 823
Eighth Report	Regulation of the water industry	HC 1041
Ninth Report	Controlling dangerous dogs	HC 1040
Tenth Report	Scrutiny of the Agriculture Bill	HC 1591
Eleventh Report	Beyond the Common Fisheries Policy: Scrutiny of the Fisheries Bill	HC 1722
Twelfth Report	Pre-appointment hearing with the Government's preferred candidate for Chair of Natural England	HC 1979
Thirteenth Report	Draft National Policy Statement for Water Resources Infrastructure	HC 1978
Fourteenth Report	Pre-legislative scrutiny of the Draft Environment (Principles and Governance) Bill	HC 1893
First Special Report	Food waste in England: Government Response to the Committee's Eighth Report of Session 2016–17	HC 444
Second Special Report	Forestry in England: Seeing the wood for the trees: Government Response to the Committee's Fifth Report of Session 2016–17	HC 445
Third Special Report	Feeding the nation: labour constraints: Government Response to the Committee's Seventh Report of Session 2016–17	HC 446
Fourth Special Report	Post-legislative scrutiny: Flood and Water Management Act 2010: Government Response to the Committee's Sixth Report of Session 2016–17	HC 447
Fifth Special Report	2 Sisters and Standards in Poultry Processing: Government Response to the Committee's First Report	HC 772
Sixth Special Report	2 Sisters and Standards in Poultry Processing: Food Standards Agency Response to the Committee's First Report	HC 861

Seventh Special Report	Pre-Legislative Scrutiny of the draft Animal Welfare (Sentencing and Recognition of Sentience) Bill 2017: Government Response to the Committee's Second Report	HC 984
Eighth Special Report	Brexit: Trade in Food: Government Response to the Committee's Third Report	HC 1021
Ninth Special Report	2 Sisters and Standards in Poultry Processing: Food Standards Agency Response to the Committee's First Report	HC 1070
Tenth Special Report	Improving air quality: Government Response to the Committee's Fourth Report	HC 1149
Eleventh Special Report	Performance of the Rural Payments Agency: Government Response to the Committee's Fifth Report	HC 1448
Twelfth Special Report	The future for food, farming and the environment: Government Response to the Committee's Sixth Report	HC 1598
Thirteenth Special Report	Fur trade in the UK: Government Response to the Committee's Seventh Report	HC 1675
Fourteenth Special Report	Regulation of the water industry: Government and Ofwat Responses to the Committee's Eighth Report	HC 1856
Fifteenth Special Report	Controlling dangerous dogs: Government Response to the Committee's Ninth Report	HC 1892
Sixteenth Special Report	Pre-appointment hearing with the Government's preferred candidate for Chair of Natural England: Government Response to the Committee's Twelfth Report	HC 2096