Food Statistics Pocketbook 2012
Contents

National Statistics ................................................................. 6

Foreword ................................................................................. 7

Key Statistics ........................................................................... 10

Chapter 1: Food Chain
1.1: Economic summary of the UK food chain ............................. 13
1.2: Gross value added of the UK agri-food sector ......................... 15
1.3: UK consumer expenditure on food, drink and catering ............ 16
1.4: UK food chain employees, GB basis .................................... 17
1.5: Trends in total factor productivity of the UK food sector ........ 18
1.6: UK grocery market shares ................................................ 19
1.7: Public sector food procurement & sales of food and drink in the UK food service sector ......................................................... 20
1.8: UK food & drink manufacturing statistics by product type .... 21
1.9: UK & Germany shares of output in the EU food & drink manufacturing sector .............................................................. 22

Chapter 2: Prices and Expenditure
2.1: Trend in share of spend going on food & drinks in low income & all UK households ................................................................. 23
2.2: UK trend in food prices in real terms ...................................... 24
2.3: Income decline after housing costs, low income decile (UK) .... 25
2.4: UK retail price changes by food group .................................... 26
2.5: Percentage change in food purchases, low income decile (UK) 27
2.6: Percentage of food budget spent on Eatwell Plate categories, low income households (UK) ...................................................... 28
2.7: Factors influencing consumer product choice ....................... 29
2.8: UK trend in sales of ethical produce ...................................... 30
2.9: Consumer segmentation by attitudes & behaviours ................ 31
2.10: Food prices in the UK compared to France ......................... 32
## Contents

### Chapter 3: Global and UK Supply

- 3.1: Origins of food consumed in the UK
- 3.2: UK Food production to supply ratio
- 3.3: Trends in UK food production
- 3.4: UK trade in different food groups
- 3.5: Trend in exports of food, feed and drink
- 3.6: Trend in world food production per capita
- 3.7: World agricultural commodity prices
- 3.8: World grains stocks to consumption ratio
- 3.9: Average retailer warehouse stock levels

### Chapter 4: Environment

- 4.1: Greenhouse gas (GHG) emissions from the UK food chain
- 4.2: Energy use in UK food chain sectors
- 4.3: Trends in food related GHG emissions from UK households
- 4.4: Trends in CO$_2$e emissions from UK food and drink manufacturing
- 4.5: Trends in acid rain precursor emissions from UK food and drink manufacturing
- 4.6: Indicators of the external impact of food transport
- 4.7: Trend in water usage rates

### Chapter 5: Waste

- 5.1: UK food and drink waste through the food chain
- 5.2: UK percentage of edible food purchases that are wasted
- 5.3: Food and drink waste generated by businesses in England
- 5.4: UK food hospitality waste going to landfill
- 5.5: UK carbon footprint of household food and drink waste
- 5.6: UK recycling of separately collected food waste
- 5.7: UK food & drink packaging waste in the supply to households
- 5.8: Public attitudes & behaviours
Chapter 6: Dietary Health

6.1: The eatwell plate 57
6.2: Household purchases compared to the eatwell ideal 58
6.3: UK Trend in purchases of fruit & vegetables 59
6.4: Trend in the consumption of fruit & vegetables in men, women and children in England 60
6.5: Trends in intakes of fat, saturated fatty acids, non-milk extrinsic sugars & sodium 61
6.6: UK average micronutrient intakes 62
6.7: The UK household diet compared with the eating out diet 63
6.8: Trends in average energy intake from food & drink 64
6.9: UK dietary indicators by equivalised income 65
6.10: Levels of adult obesity in England 66
6.11: Barriers to a healthy balanced diet 67
6.12: UK Regional household consumption of fruit and vegetables 68
6.13: UK Trend in average alcohol intake 69

Chapter 7: Safety and Confidence

7.1: Trend in the estimated number of cases of foodborne illnesses 70
7.2: Inspections and enforcement actions of food businesses 71
7.3: Contamination incidents investigated in the UK by the FSA 72
7.4: Number of adverse samples found in imported food 73
7.5: Trend in the value of food with the Red Tractor Logo 74
7.6: Spontaneous understanding of the term ‘food security’ 75
7.7: Percentage of people concerned about certain food issues 76
7.8: Extent of concern across EU whether food production meets population needs 77
National Statistics

The following statistics are “National Statistics” (official statistics that comply with the national statistics code of practice).

Chapter 1: Food Chain
1.1, 1.2, 1.3, 1.4, 1.5, 1.6, 1.8.

Chapter 2: Prices and Expenditure
2.1, 2.2, 2.4, 2.5, 2.6.

Chapter 3: Global and UK Supply

Chapter 4: Environment
4.5, 4.6.

Chapter 5: Waste

Chapter 6: Dietary Health
6.2, 6.3, 6.4 (HSE), 6.5, 6.6, 6.7, 6.8, 6.9, 6.10 (HSE), 6.12, 6.13.

Chapter 7: Safety and Confidence

Further information on National Statistics can be found on the UK Statistics Authority website.
Foreword

This publication provides a concise round-up of statistics on food covering the economic, social and environmental aspects of the food we eat (excluding agriculture).

It contains a mixture of National Statistics, official statistics and unofficial statistics. Unofficial statistics are used where there are gaps in the evidence base.

Although published in 2012 the pocketbook contains statistics for different time periods, but always using latest available data at the time of release.

Chapters are:

1. Food Chain (beyond agriculture)
2. Prices and Expenditure
3. Global and UK Supply
4. Environment
5. Waste
6. Dietary Health
7. Safety and Confidence

Economic Definition

The UK food sector is defined as food manufacturing, food wholesaling, food retailing and non-residential catering. In terms of the standard industrial classification (SIC 2007) it is defined as:

Food Manufacturing: 10 & 11
Food Wholesaling: 46.17 & 46.3 less 46.35
Food Retailing: 47.11 & 47.2 less 47.26 & 47.81
Non-residential Catering: 56

The deductions are to remove non-food items as far as possible.
The agri-food sector is the food sector plus agriculture and fishing. Agriculture and fishing are shown in several charts for comparison.

**Data sources**

Data comes from Government surveys run by the Office for National Statistics and Defra and from a wide range of other sources including Government agencies and commercial organisations. Further information on data sources, including webpage links, can be found at:

http://www.defra.gov.uk/statistics/foodfarm/food/pocketstats/

**Glossary**

**Net capital expenditure**

This is calculated by adding to the value of new building work, acquisitions less disposals of land and existing buildings, vehicles and plant and machinery.

**Gross Value Added (GVA)**

GVA is the difference between output and intermediate consumption for any given sector / industry. This is the difference between the value of goods and services produced and the cost of raw materials and other inputs which are used up in production.

**Total Factor Productivity (TFP)**

Productivity measures the efficiency at which inputs are converted into outputs. Total Factor Productivity provides a comprehensive picture of growth.
Food Security

Some indicators from the Food Security Assessment are covered in “Prices and Expenditure” (2.1, 2.2), “Global Supply and Prices” (3.1, 3.6, 3.7, 3.8) and “Safety and Confidence” (7.1, 7.2, 7.5).

Related Publications:

“Family Food 2010”
“Agricultural in the United Kingdom”
“Total Factor Productivity of the United Kingdom Food Chain”

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Key Statistics

Economy

- The agri-food sector contributed £89.1 billion or 7.0% to national Gross Value Added in 2010, and 3.7 million or 14% of national employment in Q1 2012. It was fuelled by £159 billion of consumers’ expenditure on food and drink plus exports less imports in 2011.

- Total Factor Productivity in the food chain (excluding agriculture) has been rising gradually since 2002 with food manufacture and food wholesale leading the growth.

- Food and drink sales in public sector organisations accounted for £2.1bn (6.5%) of total sales in the food service sector in 2011.

Food Supply & Prices

- Food prices have risen 12% in real terms over the last five years taking us back to 1997 in terms of cost of food relative to other goods.

- Median income after housing costs fell 12% between 2002-03 and 2010-11 for low income decile households while rising in all other income groups.

- Compared to the EU: Food prices rose 32% in the UK between 2007 and 2012 while rising only 13% in France and Germany.

- In 2011, 25 countries together accounted for 90% of UK food supply. Just over half of this (51.8%) was supplied domestically from within the UK.

- Exports have risen by almost 50% since 2005, measured in 2011 prices. Exports rose by 9% in 2011 on top of an 8% rise in 2010.
Key Statistics

Environment and Waste

- Around 195 million tonnes of CO\(_2\)e were emitted within the UK from domestic food chain activity in 2010.

- Emissions by UK households from food shopping, storage and preparation were the same in 2010 as in 2002 at 18.8mt CO\(_2\)e, having peaked in 2006 at 21.4mt CO\(_2\)e.

- Estimated total UK food and drink waste is around 15 million tonnes per year, with households generating 7.2mt/year of which 4.4 is avoidable.

- Overall 15% of edible food and drink purchases are wasted at a cost of £480 per year for an average household.

- Levels of food and drink waste by commercial and industrial businesses in the food sector were almost halved between 2002-03 and 2009, down 49%.

- In 2011, around 4 million UK households received a food waste collection service, twice as many as in 2010. This equates to nearly 16% of all households in the UK (in 2011).

Health & Food Safety

- Fruit and vegetable consumption is falling. The lowest 10% of households by income reduced purchases of fruit and vegetables by 20% between 2007 and 2010.

- In England in 2010 obesity rates increased in all age bands with adults aged 25-34 showing the largest rise at 36%. Overall, 26% were obese in 2010.

- Trends in foodborne illnesses are mixed, with salmonella, listeria and E.coli cases reducing while campylobacter cases increase.
The FSA dealt with seven high level incidents in 2011. These included the implications of the Fukushima nuclear emergency on UK imports and outbreaks of E.coli in Germany and France.

In May 2012 the main food issue of concern to respondents was food prices at 63%, an increase from 60% in November 2011.
Chapter 1: Food Chain

1.1: Economic summary of the UK food chain beyond agriculture

**UK Consumers**
- 63 million people

**Exports (a)**
- £18.1bn of which:
  - Highly processed – £10.3bn
  - Lightly processed – £6.2bn
  - Unprocessed – £1.6bn

**Total Consumers’ Expenditure (b)**
- on food, drink, and catering services – £179bn

**Caterers (restaurants, cafes, canteens)**
- Gross value added – £21.9bn (c)
- Employees – 1,534,000 (d)
- Enterprises – 112,769
- Catering Outlets – 420,034

**Household Expenditure (b)**
- on food and drink – £101bn

**Food and Drink Retailers**
- Gross value added – £26bn (c)
- Employees – 1,137,000 (d)
- Enterprises – 52,996
- Stores – 88,441

**Food and Drink Wholesalers**
- (includes agents)
  - Gross value added – £8.5bn (c)
  - Employees – 187,000 (d)
  - Enterprises – 15,172

**Food and Drink Manufacturing**
- Includes everything from primary processing (milling, malting, slaughtering) to complex prepared foods. Many products will go through several stages.
  - Gross value added – £25.2bn (c)
  - Employees – 392,000
  - Enterprises – 7,357
  - Manufacturing sites/factories – 9,215

**Imports (a)**
- £36.7bn of which:
  - Highly processed – £13.0bn
  - Lightly processed – £16.8bn
  - Unprocessed – £6.8bn
Food Chain

1.1: Economic summary of the UK food chain beyond agriculture¹

(a) Overseas trade data is final for full year 2011 from HM Revenue and Customs. (Data may not equal total due to rounding). Dashed lines indicate main trade flows.

(b) Consumers’ expenditure, properly known as household final consumption expenditure, is provisional from the Office for National Statistics for full year 2011 and is calculated at current prices. (Data may not equal total due to rounding).

(c) Gross value added (GVA) is the difference between the value of goods and services produced and the cost of raw materials and other inputs used up in production. GVA figures are from the Annual Business Survey and are finalised data for full year 2010, which is calculated at basic prices (market prices less taxes plus subsidies). **GVA for food and drink manufacturing is an estimate, as 2010 GVA data for beer manufacturing is unavailable.**

(d) Employee data for grocery retailers is for Great Britain only and is for Q1 2012 from the Office for National Statistics. Food and drink wholesaling includes an estimate of employment by food and drink wholesaling agents from the Annual Business Survey. (Employee data is rounded).

¹ Excludes sectors downstream from food and drink manufacturing such as the food and drink supply industry (food processing machinery).
The agri-food sector contributed £89.1 billion or 7.0% to national Gross Value Added in 2010, up from 6.9% in 2009.

The food sector (excluding agriculture) is showing resilience to the economic downturn with an increase of 4.2% in GVA in 2010. There were rises of 3.1% in food manufacturing, 3.0% in food retailing and 8.9% in non-residential catering.

Longer term, the food sector (excluding agriculture) increased by 40% between 2000 and 2010 while the whole economy increased by 55%. The food sector has less scope for growth as there is a limit to consumer intake capacity and therefore it relies largely on quality improvements.

There was a net reduction in registered enterprises in the food sector of over 6,000 in 2010 following a net reduction of over 4,500 in 2009, with most changes in non-residential catering. Indications are better for 2011 with a rise in employment in non-residential catering, see Chart 1.4.

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Food Chain
1.3: UK Consumer expenditure on food\(^3\), drink and catering

![Chart showing consumer expenditure on food, drink and catering from 2005 to 2011.]

Source: Consumer Trends (ONS).

- Consumer expenditure on food, drink and catering has continued to rise despite the economic downturn. There was a rise of 3.5% in 2011 to £179 billion.

- In 2011 expenditure on alcoholic drinks showed the largest increase, up 9.1%, while spend on food increased 3.1%. Catering showed a slight decrease of 0.9%.

- Spend on food shopping has increased 14% since 2007 and accounted for more than half of spend in the sector in 2011.

- Spend on all alcoholic drinks fell 5.4% between 2007 and 2009. Yearly increases in off-licence spend were countered by a 10.5% fall in on-licence spend between 2007 and 2011.

- In 2012, market research\(^4\) suggests that consumers are eating out more often than in the previous two years but that spending across the sector has declined.

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\(^3\) ‘Food’ includes non-alcoholic drinks. ‘Drink’ is alcoholic drinks.

\(^4\) QuickBite survey, Horizons June 2012.
Food Chain

1.4: UK food chain employees, GB basis\(^5\), Q1 2012

- The food sector in GB employed 3.2 million people in Q1 of 2012 (3.7 million if agriculture and fishing are included along with self employed farmers).

- The food sector covered 12% of GB employment in Q1 2012 (14% if agriculture and fishing are included along with self employed farmers).

- Employment in the food sector rose by 208,000 between Q1 2011 and Q1 2012, an increase of 6.9% driven by non-residential catering.

- An increase of 152,000 employees in non-residential catering between Q1 2011 and Q1 2012 puts this sector at a new employment high, following drops in 2009 and 2010.

- Women accounted for 58% of employees in food retailing and 53% in non-residential catering in 2011. Men accounted for 69% of hours worked in food manufacturing. In 2011 50% of food sector jobs were part time.

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\(^5\) Data for the food sector is not available for Northern Ireland, but numbers are likely to be small.

\(^6\) Wholesaling, manufacturing and retailing include tobacco.
Food Chain

1.5: Trends in the total factor productivity (TFP) of the UK food sector

- Total factor productivity of the food chain excluding agriculture has been rising gradually since 2002 with food manufacture and food wholesale leading the growth.

- Comparing 2010 with 2009 all sectors of the food chain saw year on year increases resulting in a 1.5% rise in total factor productivity of the food chain.

- Benchmarking against a wider economy measure shows that the average annual growth in the food chain between 2000 and 2010 was 0.5% compared to 0.3% in the wider economy.

- The calculation is based on reliable data on business sales and costs, employment by industry, and on price indices, all collected by the Office for National Statistics.

- Non-residential catering suffered sustained drops in TFP between 2004 and 2009 in the face of reducing demand.

- TFP growth in food retailing has been slow, particularly when food prices rose substantially in 2007 and 2008, see Charts 2.2 and 2.4.

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7 Wholesaling includes tobacco (SIC 46.35).
The combined market share of food and non-alcoholic drinks of the largest four food and drink retailers has remained unchanged at 62% in 2010. Tesco commanded the largest market share at 23%, down from 25% in 2009.

Internet food shopping increased to a new high of 3.1% of sales of food and non-alcoholic drinks in 2010, from 2.5% in 2009.

Data comes from the Living Costs and Food Survey which is fully representative of UK household food shopping.

Alternative market share estimates for 2012 from the Kantar Worldpanel are more up to date although not restricted to foods and not as representative. In 2012 compared to 2011 (based on 12 weeks ending 10 June) Kantar Worldpanel indicates little overall change in the market shares. Tesco, Morrisons and the Co-op each reduced their share by 0.4%; Aldi increased its share by 0.5% whilst Asda and Sainsbury remained unchanged.

Source: Living Costs and Food Survey (LCFS) 2010, (Defra/ONS).

Kantar Worldpanel is a market research company, providing up to date statistics on sales by the grocery sector. Market shares also include sales of non-food.
Food Chain

1.7: Public sector food procurement and sales of food and drink in the UK food service sector, 2011

- Food and drink sales in public sector organisations accounted for £2.1bn (6.5%) of total sales in the food service sector in 2011. Much is in the form of complete meals, with the public sector accounting for 2.4bn (30%) of food service meals. Education, healthcare and services are the major public sector contributors.

- In 2011 the introduction of Government Buying Standards (GBS) for food and catering services introduces a suite of criteria covering three areas of sustainable procurement:
  - foods produced to higher sustainability standards,
  - foods procured and served to higher nutritional standards, and
  - procurement of catering operations to higher sustainability standards.

Source: Horizons for Success (2011)*.

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* Horizons for Success is a commercial data source using a wide variety of data sources. It is not possible to put a precise figure on the accuracy of the data.

There were about 2,270 small and medium sized enterprises (SMEs) in the food and drink sector with turnover of £19 billion and 107,000 employees at the start of 2011. In the food sector (excluding beverages) SMEs accounted for 27% of employment and 25% of turnover. Of the 2,270 SMEs 720 or 32% are in the manufacture of bakery and farinaceous products. Beverages is the largest manufacturing group with a gross value added (GVA) of £5.8 billion in 2010, covering 23% of the food and drink sector. Alcoholic beverages had a GVA of £4.8 billion in 2010, a rise of 19% on 2009.

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For disclosure reasons some small contributions (less than 4% overall) to food and drink manufacturing GVA have been treated as zeros.
The UK accounted for 11% of EU food and drink manufacturing in 2007, with higher rates in beverages at 16%, fruit and vegetables at 12% and other food products at 12%.

Germany commanded 17% of EU food and drink manufacturing in 2007 with higher rates of 21% for dairy, 19% for meat processing and 19% for other food products.

The UK covered 16% of EU output of beverages in 2007 and made a larger contribution than Germany.

The UK accounted for 16% of EU gross value added in food and drink manufacturing and 9.4% of employment in the sector (including working proprietors).

Labour productivity in food and drink manufacturing, as measured by gross value added per person employed, is higher in the UK than in France but lower than in the Netherlands.
Chapter 2: Prices & Expenditure

2.1: Trend in share of spend going on food and drink\(^1\) in low income and all UK households, 2003-04 to 2010

![Graph showing trend in share of spend going on food and drink](image)

Source: Living Costs and Food Survey, Family Spending table 3.2e, ONS.

- The relative affordability of food is a leading indicator of household food security. It is measured by the share of total consumer spending that goes on purchases of food and non-alcoholic drink for household supplies.

- When food prices rose in real terms in 2007 and 2008 food became relatively more expensive. Low income households were affected disproportionately with a rise of 1.6 percentage points to 16.8% of all spend.

- Households saved an average of 4% between 2007 and 2010 by trading down to cheaper products.

- The lowest income decile (bottom 10%) on average bought less food rather than trading down. Energy content of their household food fell 8.7% between 2007 and 2010, as they cut back on bread, cereals, biscuits, cake, beef, fruit and vegetables.

- The share of spend on food by all households rose more gradually from 10.5% in 2007 to 11.2% in 2010, suggesting they are less reactive to food price changes.

\(^1\) Excludes alcoholic drinks.
Food prices have risen in real terms by 12% over the last five years, following a long period in which they fell.

The last five years has taken us back to 1997 in terms of the cost of food relative to other goods.

Three successive spikes in the price of agricultural commodities since 2007 have led to higher retail food prices. They have not returned to low price levels of pre-2007.

Oil prices also rose over this period, and inflation was higher than historically, but food prices have risen above inflation.

Those on lower incomes tend to buy different food items to those on average or high incomes but food prices for these different shopping baskets have risen at about the same rate.

A rise in food prices is more difficult for low income households to cope with because those on low incomes spend a greater proportion of their income on food - a rise in food prices has a disproportionately large impact on money available to spend elsewhere.

\(^2\) Excludes alcoholic drinks and catering.
Median income after housing costs fell 12% between 2002-03 and 2010-11 for low income decile households while rising in all other income groups.

Falling income (after housing costs) and rising food prices produced a double effect, reducing food affordability by over 20% for lowest income decile households.

The most commonly used threshold of poverty in the UK is having an income which is less than 60% of the median. In 2010-11 poverty levels measured this way fell by 1%. The reduction was driven primarily by incomes at the lower end of the income distribution falling less than incomes around the median.
Prices & Expenditure

2.4: UK retail price changes by food group, 2007 to 2012

Source: Consumer Price Indices (ONS).

- All foods have risen in price since 2007, with rises ranging from 17% to 36%.

- Processed foods have risen the most since June 2007, with a 15% rise in the year to June 2012.

- Fruit prices have risen the second most, by 34% since June 2007, rising steadily each year.

- The price rises initially affected milk, cheese, eggs, oils and fats in 2007, then moved on to bakery, cereals, meat, fruit and vegetables in 2008. In 2009, sugar, confectionery and coffee prices rose and in 2010, prices of fish and soft drinks caught up.

- Food price rises had a strong effect on food shopping for low income households:
  - becoming sensitive to price rises in alcoholic drinks,
  - becoming sensitive to price rises in meat,
  - cutting back on fruit and vegetables (less so if they traded down to cheaper foods).
The main response to higher food prices by low income households has been to buy less. The calorie content of their food purchases (excluding alcoholic drinks) dropped by 9% (quantity in grams by 11%) between 2007 and 2010.

Between 2007 and 2010 low income households bought:
- 26% less carcase meat,
- 25% less fruit and
- 15% less vegetables.

Low income households bought more alcoholic drinks despite food price rises, possibly because prices for alcoholic drinks rose less than prices of food.

While trading down to cheaper products has helped many people offset some of the food price rises, low income households have not managed to trade down, possibly as they were already buying cheaper products.

The lowest 10% of earners slightly reduced the proportion of their total expenditure that was spent on recreation, health and transport and increased the proportion spent on food, energy and education.

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The eatwell plate shows the types and proportions of foods that should be eaten to make a well-balanced, healthy diet (See Chart 6.1 and Chart 6.2 for more detail).

Low income households spent the largest chunk of their food budget, 32% or £5.25 per person per week, on meat, fish, eggs, beans and other non-dairy sources of protein. The Eatwell Plate requires only 12% of the plate for these foods.

Low income households spent 16% of their food budget, or £2.57 per person per week, on fruit and vegetables. The Eatwell Plate requires 33% of the plate for these foods.

Total spend per person/week on foods within the Eatwell categories is £16.49. Based on actual spend, an overall shift to an Eatwell balanced diet would not cost low income households significantly more, at £16.70. This could be achieved by spending:

- £2.77 less on foods high in fat and/or sugar,
- £1.88 more on bread, rice, pasta and starchy foods,
- a little less on meat and dairy foods and
- £2.22 more on fruit and vegetables.

Source: Family Food in 2010, Defra.
2.7: Factors influencing consumer product choice

- Price is increasingly important in driving product choice, with 41% of shoppers naming it as the most important factor and 90% listing it within their top five influences.

- Promotions are highly influential with 70% listing it in the top 5 factors.

- Less importance is placed on healthy options, with only 8% of shoppers naming it as the most important influence and only 47% listing it within the top five.

- More shoppers placed familiarity and taste/smell within their top five factors than healthy options.

- Brand names still have a sway in many purchase decisions, with 33% of shoppers naming in their top 5 influences and 2% as the most important.

- Ethically produced products were considered least important with 16% of shoppers naming it in their top 5 influences.

Source: IGD ShopperVista 2012.

Note: IGD ShopperVista 2012, base: sample of 1000 main shoppers, fieldwork July 2012. Sample is managed to be representative of main grocery shoppers but may contain unquantifiable biases.
Sales in “ethical” food and drink, including organic, fair-trade, free range and freedom foods accounted for £5.5 billion in 2010, 6.5% of all household food sales. Growth in sales of ethical produce slowed in 2009, with higher food prices, but still rose by 5% in 2010, and has increased 53% since 2006.

Sales of Fairtrade products rose by 36% in 2010 to £1 billion.

Sales of organic food and drink, which account for around one third of the ethical food sector, dropped 10% in 2010.

Sales of Rainforest Alliance products account for 21% of total ethical food sales at £1,198 million, an increase of 11% on 2009.

‘Others’ include free range eggs and poultry, freedom foods and sustainable fish. Sales of sustainable fish rose by 16% in 2010 to £0.2 billion.

Figures are determined by the Ethical Consumerism Report by The Co-operative Bank based on administrative data held by ethical labelling organisations and trade associations.

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Excludes food and drink boycotts.
Prices & Expenditure

2.9: Consumer segmentation into types of shopper for free-range chicken and eggs

- Price is a major barrier for free range chicken and eggs with 21% of households classed as Budget Watchers. Although sympathetic to animal welfare they purchased relatively few free range eggs, lower than any other group.

- Budget Watchers and Habit Buyers, making 36% of the population, have good awareness and understanding of animal welfare but have barriers to purchasing free range.

- Full Supporters and Independent Supporters could be viewed as being engaged with the issues giving an estimated 33% of the population as engaged.

- An estimated 25% of the population, classed as Indifferent Shoppers, are not engaged with the issues of animal welfare.

- Of those classed as Full Supporters, 85% purchased free-range eggs at least half the time.

- Defra’s study was based on a survey of 3,000 households in Kantar’s Household World Panel in 2010.

Source: Attitudes and behaviours around sustainable food purchasing, Defra 2011.
Based on purchasing power parities, food and non-alcoholic drinks were 4.4% cheaper in the UK than in France in 2011.

Alcoholic beverages were 35% more expensive in the UK than in France, with prices in the UK highest in the EU apart from Ireland and the Scandinavian countries.

Fish was particularly cheap in the UK in 2011 compared to other countries, and 25% cheaper than in France.

Fruit and vegetables including potatoes were 22% more expensive in the UK than the EU average and 5.8% more than France.

Within the EU, only Germany, Ireland, Austria and Sweden were more expensive than the UK for fruit and vegetables.

Norway and Switzerland were more expensive for fruit and vegetables than any EU countries.

Food prices rose 32% in the UK between 2007 and 2012 while rising only 13% in France and Germany.

Source: Eurostat.

7 Purchasing power parities compare prices in different countries after removing the effects of exchange rate differences.
Chapter 3: Global & UK Supply

3.1: Origins of food consumed in the UK, 2011

Source: Defra.

- Sourcing food from a diverse range of stable countries, in addition to domestically, enhances food security\(^1\).

- Based on the farm-gate value of unprocessed food;
  - Twenty five countries accounted for 90% of UK food supply in 2011. The UK supplied over half (51.8%). The leading foreign suppliers were the Netherlands (5.9%), Spain (5.1%), France (3.3%), Irish Republic (3.2%) and Germany (2.6%).
  - Three countries accounted for 90% of dairy product and bird’s egg supply (UK supplied 83%).
  - Four countries accounted for 90% of meat and meat preparation supply (UK supplied 82%).
  - Nine countries accounted for 90% of supply of cereals and cereal preparations (including rice). The UK supplied 62%.
  - Twenty five countries accounted for 90% of fruit and vegetable supply (UK supplied 23%).

\(^1\) UK Food Security Assessment, January 2010 (Defra).
**Global & UK Supply**

### 3.2: UK Food production to supply ratio, 1988-2011

![Graph showing UK food production to supply ratio, 1988-2011](image)

**Source:** Agriculture in the United Kingdom 2011, Defra.

- Food Production to Supply Ratio, which is calculated as the farm-gate value of raw food production (including for export) divided by the value of raw food for human consumption was 63% for all food in 2011 and 78% for indigenous type food.

- This compares with 61% and 75% respectively in 2010. This increase on 2010 is a result of increases in the value of domestically produced oilseed, beef, milk and wheat.

- The production to supply ratio provides a very broad indicator of the ability of UK agriculture to meet consumer demand.

- A high food production to supply ratio fails to insulate a country against many possible disruptions to its supply chain.

- Production potential is more relevant at EU level than United Kingdom level, and the EU as a whole has a food production to supply ratio of over 90%.

- Further trade liberalisation is unlikely to materially affect food security within the EU.
Global & UK Supply

3.3: Trends in UK food production²

Source: Agriculture in the United Kingdom 2011, Defra.

- Final output³ of UK agriculture is a proxy for UK food production. It rose 3% in 2011 but shows no overall trend, standing at 1% above 1990 levels.

- Total UK cereal production has fluctuated, with significant dips in 2001 & 2007 linked to adverse weather conditions. Favourable planting conditions in autumn 2009, plus strong market prices, led to an increase in the area of wheat planted. The overall area of cereals decreased by 2% in 2010, driven mainly by a reduction in the area of malting barley, the result of poor market conditions.

- Since 1990 there have been large increases in production levels of poultry meat, part of a longer term upward trend since the late 1970’s. Although production dipped during the 2000’s, in 2010 and 2011 it was almost back to 2005 levels.

- Red meat production showed a downward trend through much of the 1990’s, driven by a combination of factors including the beef export ban. Since 2002 there has been a slight upward movement but levels still remain lower than those in the early 1990’s.

² 2011 figures are provisional.
³ Gross output less transactions within the industry.
The value of imports is greater than the value of exports in each of the broad categories of food, feed and drink except ‘Drink’ which had a trade surplus of £1.82 bn in 2011, largely due to exports of Scottish Whisky.

Drinks are the largest export category by far with a total export value of £6.8 bn in 2011, an increase of 25% on 2009 at 2011 prices. Much of the increase was to existing markets; USA, France and Singapore plus emerging markets such as Brazil and Mexico.

Cereals is the next largest export group with an export value of £2.0 bn followed by the meat and fish categories at £1.7 and £1.5 bn respectively.

The group for which the UK has the largest trade deficit is fruit and vegetables. In 2011 the value of imports was £8.1 bn against the value of exports of £0.9 bn giving a trade gap of £7.2 bn. The second largest groups in terms of imports in 2011 were meat and drink with imports of £5.7 and £5.0 bn respectively.

Source: HM Revenue and Customs.
3.5: Trend in exports of food, feed and drink

Source: HMRC

- Exports have risen by almost 50% since 2005, measured in 2011 prices. Exports rose by 9% in 2011 on top of an 8% rise in 2010. This is a rise of £2.72 billion between 2009 and 2011 measured in 2011 prices.

- Exports of beverages rose 25% or £1.37 billion between 2009 and 2011 measured in 2011 prices.

- The trade deficit in food, feed and drink was 9% lower in 2011 than in 2009, now standing at £18.6 billion.

- Export values in 2011 increased with whisky, wine, cheese, poultrymeat, beef and veal, lamb and mutton, milk and cream, bacon and ham and butter all rising by over 10%.

- In 2010, around 5,000 traders\(^4\) were recorded as exporting food, feed and drink to the EU and around 4,000 exporting outside the EU. Most (about 60% exporting to EU and 80% exporting outside the EU) export less than £250k per annum but make up a small amount of total exports (less than 10%). These are likely to be small and some micro enterprises.

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\(^4\)Traders include food companies directly trading and intermediaries representing many food companies. For EU trade this excludes companies below £250 thousand turnover.
Global & UK Supply

3.6: Trend in world food production per capita

Source: UK Food Security Assessment (Defra) updated with FAO5 balance sheets.

- Global production of food relative to population is a fundamental indicator of global food security.

- Growth in the productive potential of global agriculture has so far exceeded the growth in effective demand.

- World population is currently growing 1.1% per year and increased 30% between 1990 and 2010. Food production has grown at a faster rate, currently 1.6% per year, and was 56% higher in 2010 than in 1990.

- Domestic food prices in developing countries remain 25% higher relative to non-food consumer prices than in early 2005. While incomes in developing countries have continued to rise, the sharp increase in food prices will have limited gains for many households such as the urban poor, where food often represents more than half of their total expenditures6.

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5 Food and Agricultural Organisation of the United Nations (FAO).
Global & UK Supply

3.7: World agricultural commodity prices to July 2012

- Wheat prices rose 30% between April and July 2012, caused by a major drought in the US “corn belt” and poor wheat harvests elsewhere.

- Wheat prices peaked in March 2008, May 2011 and again in July/August 2012. The first was the most severe, doubling the wheat price within a year. The second and third spikes took prices back up to 80% of the first peak.

- Sugar prices peaked in Jan 2011, over 150% higher than in Dec 2008. Sugar prices were 23% lower in July 2012 than in the peak in Jan 2011.

- Rice prices peaked in April 2008 having risen threefold over 8 months. The price in July 2012 was 22% higher than a year previously but 43% below the 2008 peak.

- Palm oil prices peaked in Feb 2011 rising 60% in 7 months. The price in July 2012 was 21% lower than the 2011 peak.

- There are nearly 1 billion hungry people worldwide. More than 60% of the world’s hungry are women. One third of all child deaths globally are attributed to under-nutrition⁷.

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⁷ Food Price Volatility, a Growing Concern; World Bank Stands Ready to Respond, July 2012.
Global & UK Supply

3.8: World grains stocks to consumption ratio to 2011-12

- Stocks to consumption ratios are an indicator of global resilience to food shortages and price stability. With low stocks, markets become sensitive to further supply shortfalls, which magnifies the price response.

- Wheat and rice stocks remain relatively high at the end of the 2011-12 crop year, although the downward trend in wheat stocks is projected to continue in 2012-13. Rice stocks have been on an upward trend since 2008-09. Severe drought in the USA in 2012 significantly reduced global production of maize, so the coarse grain stocks-to-use ratio is expected to fall in 2012-13.

- Global cereal stocks dropped in the mid 2000s to a lower level than in the previous two decades, largely due to a reduction in stocks in China.

- Consumption (the denominator) is on a gradually rising trend, pushing the indicator onto a downward trend.

Source: International Grains Council (IGC), United States Department of Agriculture (USDA).

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3.8 USDA projections.
Global & UK Supply

3.9: Average retailer warehouse stock levels (days) by grocery category

- In the last five years, the industry has largely reduced stock levels across the majority of categories, with a combined reduction of 0.7 days. Beer, wines and spirits recorded the greatest reduction at 3.7% over this period, equivalent to 2.9 days cover.

- This was also for a reduction for ambient slow moving groceries (SMGs). However there was a slight jump in 2009 reflecting the importance of on-shelf availability in a tough economic climate. In 2010, a reduction of 1.6 days cover returned levels to those of around 2007 at 11.8 days.

- Stock levels of fast moving groceries (FMGs), such as bread, milk etc remained fairly stable over this period at around 9 to 10 days cover. In 2010 industry average warehouse stock level for FMG was 9.7 days.

- Stock levels of frozen goods is the only category to show an increase over the five year period, increasing cover by one day to 9.8 days cover.


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9 In general, produce, chilled and fresh categories do not have a warehouse stock-holding but are cross-docked directly from the supplier onto store deliveries. For this reason, these categories are not included.
Around 195 million tonnes of CO$_2$ equivalent GHGs (CO$_2$e) were emitted within the UK from domestic food chain activity in 2010, excluding emissions from non-fertiliser pre-farm production, food packaging, food waste and land use change.

The largest contributor to emissions is net trade in food and drink which is estimated at 77 mt CO$_2$e. This is emissions from food imports less emissions from food exports.

The UK farming and fishing sector was the second largest contributor, accounting for 54mt CO$_2$e. Enteric fermentation in ruminating animals and oxidisation of nitrogen in fertilisers is the source of most of these emissions. Fertiliser use accounted for a further 2.8mt CO$_2$e.

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1 GHG emissions from imports and exports, food packaging, food waste and land use change are not included. Manufacturing includes emissions from electricity use and excludes emissions from road freight transport. Household does not include emissions from heating water for washing up or dishwashers.

2 Experimental data which may be subject to revision following review.
4.2: Energy use in UK food chain sectors, 2010

- Net trade is the largest contributor to energy use at 12.5 million tonnes of oil equivalent (Mtoe), or 32%. This is energy use in food imports less energy use in food exports.

- Energy consumption in UK food production was the same in 2010 as in 2008, having dipped 3.5% in 2009.

- Natural gas accounted for 61% of total energy consumption in food and drink manufacturing in 2010, followed by electricity (31%), petroleum (6.1%), fuel oil (1.2%) and coal (0.9%).

- Longer term energy consumption (excluding electricity) in food and drink manufacturing fell 16% between 1990 and 2010, with a 94% reduction in fuel oil use and an 86% reduction in coal. Natural gas use increased between 1990 and 2000 but has since fallen 18% to 2.4 Mtoe in 2010.

Source: Environmental Accounts (ONS), Food Transport Indicators (Defra), Energy Consumption in the UK (DECC), British Survey of Fertiliser Practice (Defra), Consumption Emissions (Defra).

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3 Household does not include emissions from heating water for washing up or dishwashers. Primary energy is the energy used in electricity production, not the amount of electricity used.

4 Experimental data which may be subject to revision following review.

5 Digest of United Kingdom Energy Statistics (DECC). Data excludes energy used to generate heat for all fuels except manufactured solid fuels and electricity.
4.3: Trends in food related greenhouse gas (GHG) emissions from UK households<sup>6</sup>, 2002-2010

Source: Food Transport Indicators (Defra), Energy Consumption in the UK (DECC).

- GHG emissions by UK households from food shopping, storage and preparation were the same in 2010 as in 2002 at 18.8mt CO<sub>2</sub>e, having peaked in 2006 at 21.4mt CO<sub>2</sub>e.

- Cold storage and electric cooking are the largest contributors to household food emissions at 7.3mt CO<sub>2</sub>e (39%) and 6.7mt CO<sub>2</sub>e (36%) respectively in 2010.

- Food shopping emissions increased in 2010, rising 8.3% to 3.5mt CO<sub>2</sub>e.

- Emissions from food shopping, storage and preparation are between 11% and 15% lower than their peaks in 2006.

- Total energy use from households (excluding driving) fell 6.6% between 2002 and 2010 to 7.9mtoe.

<sup>6</sup> Household does not include emissions from heating water for washing up or dishwashers.
CO\(_2\) emissions from UK food and drink manufacturing have been on a downward trend since 1999. They were 16% lower in 2010 than in 1999 (11% lower than in 1990).

The downward trend in CO\(_2\) emissions from UK food and drink manufacturing is similar to the downward trend in total domestic emissions.

The volume of output from food and drink manufacturing fell during the economic downturn leading to a reduction in the level of CO\(_2\) emissions.

An increase in the volume of outputs along with a prolonged period of exceptionally cold weather produced an increase in CO\(_2\) emissions in 2010.

Source: Environmental Accounts (ONS), Energy Consumption in the UK (DECC).

\(^7\) Manufacturing figures include the share of CO\(_2\) emissions relating to electricity production using a constant emission factor. Total domestic CO\(_2\) emissions include net emissions/removals from land use and land use change but with no allowance for EU Emission Trading Scheme purchases.
4.5: Trends in acid rain precursor emissions from UK food and drink manufacturing to 2010

- Acid rain precursor emissions include sulphur dioxide (SO₂), nitrogen oxides (NOₓ) and ammonia (NH₃).

- Total acid rain precursor emissions from food and drink manufacturing have fallen by 80% since 1990 and 2.9% since 2009 to 16.25 kilotonnes of SO₂ equivalent (kt SO₂e) in 2010.

- In 2010 nitrogen oxides accounted for 79% of all acid rain precursor emissions from food and drink manufacturing. Ammonia and sulphur dioxide accounted for around 8.2% and 12% respectively.

- Ammonia is the smallest contributor to acid rain precursor emissions and has shown the lowest level of reduction of the three precursor types since 1990 at 12%.

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8 Emissions that cause acid rain.
9 Includes road freight transport but excludes electricity use.
10 The emissions are weighted together using their relative acidifying effects. The weights, given relative to SO₂, are 0.7 for NOₓ and 1.9 for NH₃. This is a simplification of the chemistry involved and there are a number of factors which can affect the eventual deposition and effect of acid rain.
4.6: Indicators of the external impact of food transport

- The external impacts of food transport peaked in 2006-2007. Although 3 out of the 4 indicators showed an increase in 2010, the underlying trends may not have changed.

- UK urban food kilometres increased by 6.4% from 2009 to 2010 but there is little evidence of a clear trend in the data:
  - CO₂ emissions from food transport increased 4.1% in 2010 but remain 4.0% lower than in 2006, suggesting an underlying downward trend remains.
  - HGV food kilometres increased by 6.9% in 2010 broadly in line with other national economic outputs measures. A downward trend in HGV food kilometres since 2004 is apparent despite the increase in 2010.

- Urban food km is a proxy for urban road congestion; HGV food km is a proxy for infrastructure costs.

- Air food kilometres have fallen after a period of rapid growth up to 2007, with some evidence that this is stabilising at around 2003 levels. Although air freight of food accounts for only 1% of food tonne kilometres, it produces 12% of the food transport CO₂ emissions.

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11 Air, urban and HGV are measured in vehicle kilometres, CO₂ emissions are measured in tonnes.
12 Emissions from food transport are also covered in Chart 4.1.
Federation House Commitment is a voluntary agreement for the food and drink manufacturing sector. Its aim is to help reduce the stress on the nation’s water supplies and contribute to an industry-wide target to reduce water use by 20% by 2020 against a 2007 baseline.

Water usage is declining among FHC members with a drop of 23% in water usage per tonne of product at 213 sites with comparable data between 2007 and 2011.

FHC signatories represent 24% of the food and drink industry (based on total water use in 2007).

Between 2007 and 2011 signatories collectively made a 14.4% reduction in their water use (excluding that in product). This reduction is equivalent to 5.9 million m$^3$ or around 2,400 Olympic-size swimming pools.

As of July 2012, the FHC has 70 signatories across 278 sites, 60% of whom are from the ‘soft drinks & beverages’, ‘dairy’ and ‘meat processing’ sectors.

Source: Federation House Commitment (FHC), Progress report 2012 (WRAP).
5.1: UK food and drink waste through the food chain

- Estimated total UK food and drink waste is around 15 million tonnes per year, with households generating 7.2mt/year of which 4.4 is avoidable.

- WRAP estimate a 1.1mt reduction between 2006 and 2010, although more work is needed to reconcile estimates of purchases, consumption and waste.

- The hospitality\(^2\) sector disposed of around 600 thousand tonnes of food waste to landfill in 2009, of which almost 400 thousand was avoidable.

- Schools in England dispose of around 80 thousand tonnes of food waste, with primary schools generating more than secondary schools.

- Estimates are based on peer-reviewed studies. Accuracy will vary with some being indicative only. See individual studies for further information.

\(^{1}\)Excluding agriculture.

\(^{2}\)This data covers landfill waste from hotels, pubs, restaurants and quick service restaurants.
Overall 15% of edible food and drink purchases are wasted each year. Different foods are wasted at different rates; 17% of overall food purchases, 7.1% of soft drinks and 6.3% of alcoholic drinks are wasted.

Avoidable food and drink waste in the home is estimated by WRAP at £12 billion per year or £480 per household.

‘Not used in time’ is often cited as the reason for throwing away food. Bread is the most wasted food with 32% of edible purchases being wasted. Bread crusts are not classed as edible in this analysis.

Vegetables and potatoes are wasted at a similar rate (24%), equivalent to 730 thousand tonnes of edible vegetables and 400 thousand tonnes of edible potatoes wasted per year.

On a calorie basis 16% of food and drink is wasted. Some nutrients have a higher level of waste e.g. carbohydrate at 20% and fibre at 23%. Some nutrients are wasted far less e.g. non-milk extrinsic sugars found in confectionery, soft drinks, fruit juices and biscuits at 9.3%.

Source: Household food and drink purchases linked to waste, Defra 2010.

3 Data was collected between 2006 and 2008.
4 Calculated as total purchases minus the difference between total waste and avoidable waste.
### Waste

#### 5.3: Food and drink waste generated by businesses in England

![Bar chart](chart.png)

*Source: Survey of commercial and industrial waste arisings 2002-03 and 2009, Defra.*

- The surveys covered all commercial and industrial businesses and are often used to benchmark other analyses, e.g. hospitality sector estimates for the UK.

- Levels of food and drink waste in the food sector were almost halved between 2002-03 and 2009, down 49%:
  - retail and wholesale achieved a 69% drop,
  - food and drink manufacturing achieved a 43% drop.

- There was a relatively small reduction in food and drink waste at education sites, down only 30% (around 100 thousand tonnes) between 2002-03 and 2009.

- Around 51% of food waste generated by businesses in the food and drink sector will either be recycled, composted or reused. The amount of food waste sent to landfill is about 8%.

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5 Comparisons between estimates for the two years will be valid, but due to the interval between the two surveys there have been inevitable changes such as the standard SIC classification scheme for businesses, which will have some unavoidable effect on the results.
5.4: UK food hospitality waste going to landfill

- Waste going to landfill from the UK hospitality sector\(^6\) in 2009 is estimated at 1.5 million tonnes, which includes 600 thousand tonnes\(^7\) of food waste (41%). The majority of this, 400 thousand tonnes, is avoidable.

- Pubs and restaurants generate more food waste than hotels and quick service restaurants combined.

- WRAP estimates that UK Hospitality businesses pay around £1.02 billion a year buying food that is subsequently wasted. Most food waste from this sector heads to landfill but WRAP estimates that £6.6 million a year could be saved if this waste went for anaerobic digestion.

- Total food waste generated by schools in England is estimated at 80 thousand tonnes (67 thousand tonnes classed as avoidable and potentially avoidable). Of this, 55 thousand tonnes is generated by primary schools\(^8\).

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\(^6\) This data covers 4 areas of the hospitality sector: UK hotels, pubs, restaurants and quick service restaurants. It only covers waste disposed to landfill.

\(^7\) See The composition of waste disposed of by the UK Hospitality Industry, WRAP 2011 for definitions.

\(^8\) See Food waste in schools, WRAP 2011.
Waste

5.5: UK carbon footprint of household food and drink waste

- Avoidable food and drink waste by households is responsible for 17 million tonnes of CO\textsubscript{2} e (carbon dioxide equivalent) per year: equivalent to one third of the emissions of CO\textsubscript{2} (rather than CO\textsubscript{2} e) associated with household electricity in the UK.

- The average carbon footprint of avoidable household waste is around 270kg CO\textsubscript{2} e per person per year.

- Emissions due to changes in land use are excluded. If they were to be included it would increase the estimates by 20%.

- Each tonne of food waste sent to landfill produces 4.2 tonnes of CO\textsubscript{2} e. Sending a tonne of food waste through anaerobic digestion rather than landfill saves around 3.7 tonnes of CO\textsubscript{2} e.

- The water footprint of avoidable household food waste is 4,400 million cubic metres per year, representing approximately 4% of all of our water requirements.

Source: The water and carbon footprint of household food and drink waste in the UK, WRAP 2011.
Waste

5.6: UK recycling of separately collected food waste

- Local authorities in the UK collected and recycled 244,115 tonnes of separately collected food waste from households in 2011, a 54% increase on 2010.

- In 2011, around 4 million UK households (around 16% of the total) received a food waste collection service, twice as many as in 2010.

- Separately collected food waste accounted for around 2.1% of the total UK household waste collected for recycling in 2011, compared to 1.3% in 2010.

- In 2010, local authorities collected 3.8 million tonnes of food waste in England, a reduction of around 840,000 tonnes from 4.7 million tonnes in 2006-07.

- Disposal of UK household food waste in 2010:
  - Municipal waste - 64% (70% in 2007),
  - The sewer – 26% (22% in 2007) and
  - Home composted or fed to pets – 10% (8% in 2007).


9 2011 data is provisional. Final data is due autumn 2012.
11 New estimates for household food and drink waste in the UK, WRAP November 2011.
12 Separate kerbside food waste collections form part of this 64%.
5.7: UK food and drink packaging waste in the supply to households

- Packaging protects products in transit and helps maintain shelf life for perishable foods.

- An estimated 3.6 million tonnes of grocery\(^\text{13}\) packaging enters households which is over two thirds of the total grocery packaging waste.

- Food and drink packaging emissions amount to 8.7 million tonnes of CO\(_2\)e (6.1 million for household purchases).

- The Courtauld Commitment is a responsibility deal between the UK grocery sector and WRAP, delivered in partnership with local authorities. It has led to savings of around 670 thousand tonnes of food waste and 520 thousand tonnes of packaging waste between 2006 and 2009, which equate to around 3.3 million tonnes of CO\(_2\)e being avoided - the same as stopping half a million around the world flights.

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\(^{13}\) Including packaging from non-food and drink products sold in grocery shops.
5.8: Public attitudes and behaviours

- These statistics provide response levels on awareness of issues because people, on average, give responses that indicate the behaviour they aspire to rather than actual behaviour. This survey was conducted online across GB.

- 40% of people surveyed responded correctly that food should not be eaten after the end of the use-by date indicating that the vast majority of consumers are misinterpreting food date labelling.

- Whilst the vast majority (90%) of food shoppers buy food on special offer only 4% believe it leads to more food waste.

- Although a third of those who cooked rice and pasta admitted to having leftovers, only 1 in 7 admit to throwing away food which is left over.

- On what would encourage people to try and minimise food waste: 50% said ‘a desire to reduce their impact on the environment’ and 75% ‘possibility of saving money’.

Chapter 6: Dietary Health

6.1: The eatwell plate

The eatwell plate shows the types and proportions of foods that should be eaten to make a well-balanced, healthy diet. The eatwell plate balance does not need to be achieved at every meal; it is a guide to getting the balance right over time such as each day, or over the course of a week. The eatwell plate includes snacks as well as meals.

- We should try to eat:
  - Plenty of ‘bread, rice, potatoes, pasta and other starchy foods’ (33%). Choose wholegrain varieties when you can.
  - Some ‘milk and dairy foods’ (15%).
  - Just a small amount of ‘foods and drinks high in fat and/or sugar’ (8%).
  - Some ‘meat, fish, eggs, beans and other non-dairy sources of protein’ (12%).
  - Plenty of ‘fruit and vegetables’ (33%).

Source: Department of Health.
Dietary Health

6.2: Household purchases compared to the eatwell ideal

- Food and drink purchases for household supplies were grouped approximately into the five eatwell plate groups\(^1\). This comparison indicates that in 2010 for household supplies we are purchasing:
  - too little ‘bread, rice, potatoes, pasta and other starchy foods’; need to buy over 70\% more,
  - too much ‘milk and dairy foods’; need to reduce by around 30\%,
  - too much ‘food and drink high in fat and/or sugar’; at 23\% this is almost three times the eatwell ideal amount,
  - the right proportion of ‘meat, fish, eggs, beans and other non-dairy sources of protein’,
  - too little ‘fruit and vegetables’; purchases are around 40\% less than the eatwell ideal.

\(^1\) Alcohol, low calorie drinks, tea, coffee and mineral water were excluded from ‘beverages’ and ‘soft drinks’. Slimming & sports foods & infant cereal foods were excluded from ‘other cereals and other cereals products’. Only jelly, ice cream and soya foods were included from ‘other food and drink’.

Source: Family Food in 2010, Defra.
Dietary Health

6.3: UK trend in purchases of fruit and vegetables (excluding potatoes) to 2010

Source: Family Food in 2010, Defra.

- There is a downward trend in purchases of fruit and vegetables since 2006.

- The lowest income households\(^2\) reduced purchases of fruit and vegetables by 20% between 2007 and 2010, down to an average of 2.7 portions per person of 5 A DAY\(^3\) in 2010.

- The income effect is largely restricted to the lowest ten percent. Households in the second decile reduced purchases of fruit and vegetables by only 12% between 2007 and 2010.

- Purchases of 5 A DAY across all households were unchanged in 2010, averaging 4.0 portions per person per day; the same level as in 2001-02.

- Defra estimates that 22% of edible fruit & vegetables are wasted\(^4\).

- The decline in purchases of fruit and vegetables coincides with large rises in food prices between 2007 and 2010 (see Chart 2.2).

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\(^2\) Lowest income households are those with incomes in the lowest ten percent of all households. Data on low income households is available from 2001.

\(^3\) 5 A DAY calculated as all purchases of fresh and processed fruit and vegetables including fruit juice divided by the adult portion size of 80 grams.

\(^4\) Household Food and Drink Waste linked to Food and Drink Purchases, Defra July 2010.
Dietary Health

6.4: Trend in the consumption of fruit and vegetables in men, women and children in England to 2010

- Consumption of 5 A DAY is declining faster for women, 15% fewer achieving 5 A DAY in 2010 than in 2006.

- Overall 5 A DAY consumption in 2010 was 6% below 2006 levels for adults and the same as 2005 levels for children.

- In 2010 25% of men, 27% of women and 20% of children (aged 5 to 15 years) consumed the recommended 5 A DAY.

- Between 2009 and 2010, there was a 33% increase in children in England who included no fruit and vegetables in their diet.

- About 1 in 15 people (same for adults and children) included no fruit and vegetables in their diet in 2010.

- The reduction in 5 A DAY in 2010 was greatest in women aged 55-64, losing on average 0.3 portions per day.

Source: Health Survey for England 2010 (NHS Information Centre)\(^5\).

\(^5\) Data from the Health Survey for England is weighted for non-response from 2003 onwards. Consumption is based on a 24 hour period.
Dietary Health

6.5: UK trends in intakes of fat, saturated fatty acids, non-milk extrinsic sugars\textsuperscript{6} and sodium to 2010

- The rise in food prices since 2007 coincides with the end of the downward trend in sodium content of food purchases. Levels have stabilised at 2.83 g/person/day. This is 13% lower than in 2001-02, but above the SACN\textsuperscript{7} recommendation of 2.40g of sodium including table salt.

- The downward trend in percentage of energy from NMES continued in 2010 to a new low of 13.9%. This is 6% lower than in 2001-02 but above the recommended level of 11%.

- The downward trend in intake of saturated fat was unaffected by the food price rises, 6% lower in 2010 than in 2001-02.

- Total fat should contribute no more than 35%\textsuperscript{8} of food energy intake (excluding alcohol), with saturated fat contributing no more than 11%. Estimates for 2010 from the Family Food survey exceed this at 38.6% and 14.2% respectively.

\textsuperscript{6} NMES – free sugar not bound in foods e.g. table sugar, honey and sugars in fruit juices, but excluding milk sugar.

\textsuperscript{7} For recommended intakes see Dietary Reference Values for Food Energy and Nutrients in the United Kingdom, 1991 (Department of Health).

\textsuperscript{8} Scientific Advisory Committee for Nutrition.
Dietary Health

6.6: UK average micronutrient intakes, 2001-02 to 2010⁹

Source: Family Food in 2010, Defra.

- Average intakes of all vitamins and minerals met or exceeded recommended levels in 2010 with the exception of potassium at 99%.

- Intake of vitamin B₁₂ has been consistently high since 2001-02 and remains at around four times the recommended level.

- Average intake of micronutrients across the whole population¹⁰ changed little between 2009 and 2010, mostly by less than 1%. Exceptions include: increases in beta-carotene (4.9%), vitamin D (1.8%) and vitamin C (1.4%), and a decrease in calcium of 1.8%.

- Despite these small changes, intakes of most micronutrients remain below the levels seen in 2007;
  - vitamin B₆ by 2.5%,
  - potassium and zinc by 2.1%,
  - calcium by 2.0% and
  - folate by 2.0%.

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⁹Reference Nutrient Intake: the intake which is considered sufficient to meet the requirements of 97.5% of the population.

¹⁰Family Food in 2010, Defra.
The eating out diet contributed 10.8% of energy intake in 2010, excluding energy from alcohol. It contains more fat and protein but less carbohydrate and non-milk extrinsic sugar than the household diet, and it includes all food and drink that is not brought into the household.

Mono-unsaturated fatty acids are higher in the eating out diet. They are found in olive oils, rapeseed oil, fish oils, nuts, milk and some meat and meat products.

Poly-unsaturated fatty acids are higher in the eating out diet. They are found in vegetable oils and fish oils and some meat and meat products.

Saturated fatty acids are lower in the eating out diet. They are found in milk and dairy products, meat and meat products, biscuits, cakes and pastries.

Source: Family Food in 2010, Defra.

For recommended intakes see Dietary Reference Values (DRVs) for Food Energy and Nutrients in the United Kingdom, 1991 (Department of Health).
**Dietary Health**

6.8: Trends in average energy intake from food and drink to 2010

- Average energy intake based on all food and drink purchases decreased by 0.5% to 2,292 kcal per day in 2010 from 2,304 kcal in 2009. This is 4.8% lower than the average energy intake in 2001-02.

- Energy intake from food and drink recorded as eating out increased by 3.1% in 2010 but has still fallen 17% since 2001-02.

- There is a long term downward trend in energy intake since 1964, visible in all components of the chart. Combining year on year changes of estimates on like bases suggests that average energy intake per person is 28% lower in 2010 than in 1974.

- Despite decreasing energy intake, over-consumption of energy relative to our needs is a major factor in increasing levels of obesity, see Chart 6.10.

- Average energy intake based on household purchases in the lowest income decile was 11.4% lower than the UK average in 2010.

Source: Family Food in 2010, Defra.

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**Diagram Description**

- **Original NFS**: National Food Survey 1940 to 2000
- **Adjusted NFS from 1974**: alcoholic drinks, soft drinks, and confectionery included from 1992
- **Eating out included from 1994**: alcoholic drinks, soft drinks, and confectionery included from 1992
- **EFS from 2001-02**: Expenditure and Food Survey from 2001-02 (now known as Living Costs & Food Survey)

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**Source**

Family Food in 2010, Defra.
There is no income effect on the percentage of food energy derived from total fat intake and only a small effect on the percentage of food energy derived from saturated fat intake.

There is a large income effect on NMES\textsuperscript{13} intake. The percentage of food energy obtained from NMES is highest in the lower income quintiles and falls as the income rises.

There is a strong income effect on fruit and vegetable purchases with the highest income quintile households purchasing over 50\% more than the lowest income quintile group. Their purchases (not accounting for waste) come to 4.9 portions a day.

Purchases of fruit and vegetables in the lowest income quintile in 2010 were equivalent to 3.2 portions per day, see Chart 6.3.

\textsuperscript{12}Household income adjusted for size and composition using the OECD scale.
\textsuperscript{13}NMES – free sugar not bound in foods e.g. table sugar, honey and sugars in fruit juices, but excluding milk sugar.
6.10: Levels of adult obesity in England\textsuperscript{14}

![Graph showing levels of adult obesity in England by age group.](image)

Source: Health Survey for England 2010 (NHS Information Centre).

- Direct costs caused by obesity are now estimated to be £5.1 billion per year. Obesity is associated with cardiovascular risk and with cancer, disability during old age, decreased life expectancy and serious chronic conditions such as Type 2 diabetes, osteoarthritis and hypertension.

- Obesity rates rose in all age bands in 2010, with an overall rise of 14%. Adults aged 25-34 years showed the largest rise at 36%. Overall 26% of people were obese in 2010.

- In 2010, women in the lowest income quintiles were more likely to be obese than those in the highest quintile\textsuperscript{15}. There was no clear relationship for men between BMI and income.

- The OECD\textsuperscript{16} reported in 2011 that the prevalence of overweight and obesity in adults exceeds 50% in 19 of 34 OECD countries and that obesity rates in many western European countries have increased substantially over the past decade.

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\textsuperscript{14} Body Mass Index (BMI) is a measure of weight relative to height: underweight = less than 18.5kg/m\textsuperscript{2}, normal = 18.5 to less than 25kg/m\textsuperscript{2}, overweight = 25 to less than 30kg/m\textsuperscript{2}, obese = 30kg/m\textsuperscript{2} or more (includes morbidly obese), morbidly obese = 40kg/m\textsuperscript{2} or more.

\textsuperscript{15} HSE 2010: ‘Obesity and demographic characteristics’; using equivalised household income.

Dietary Health

6.11: Barriers to a healthy balanced diet

Source: Attitudes and Behaviours around Sustainable Food Purchasing, Defra 2011.

- The main barriers to a healthy balanced diet are ‘don’t want to give up the foods I like’, ‘healthy foods are too expensive’ and ‘can’t resist less healthy food’.

- The data for this Defra study was collected from the Kantar Worldpanel in 2010.

- Of the panel 19% say it is not greatly important that their food forms part of a healthy balanced diet, although around half of these claimed to actively seek healthier foods.

- Of the 73% of the panel who say a healthy diet is important and that they actively seek healthy foods, the main drivers for trying to ensure a healthy diet are: still enjoying a treat from time to time (64%), knowing how to cook in healthy ways (50%) and not too expensive (46%).

- Of households on the panel who actively seek foods which support a healthy diet 53% are achieving 5 A DAY. Only 26% of those who do not rate a healthy diet as important achieve 5 A DAY.

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17 Based on GB data supplied by Kantar Worldpanel from a sample of 3,000 households selected from their panel of 25,000 respondents.
Purchases of fruit and vegetables (excluding potatoes) were highest in the South West and London at an equivalent of 4.5 portions per person per day, with the East being just behind at 4.4 portions per day.

Within England, household purchases of fruit were lowest in the North East, and household purchases of vegetables were lowest in the North West.

Much of the regional variation may be explained by differences in income. In general, purchases of fruit and vegetables increase with income, see Chart 6.9.

Waste and inedible content are not taken into account here. See Chart 6.3 for trends over time and Chart 5.2 for estimates of edible waste.

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18 5 A DAY calculated as all purchases of fresh and processed fruit and vegetables including fruit juice divided by the adult portion size of 80 grams.
### Dietary Health

#### 6.13: UK Trend in average alcohol intake (including eating out)

<table>
<thead>
<tr>
<th>Year</th>
<th>Wales</th>
<th>Scotland</th>
<th>England</th>
<th>N Ireland</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>10.8</td>
<td>9.1</td>
<td>9.9</td>
<td>9.2</td>
</tr>
<tr>
<td>2003</td>
<td>10.1</td>
<td>8.9</td>
<td>9.0</td>
<td>9.1</td>
</tr>
<tr>
<td>2004</td>
<td>10.0</td>
<td>8.8</td>
<td>9.0</td>
<td>8.8</td>
</tr>
<tr>
<td>2005</td>
<td>9.9</td>
<td>8.7</td>
<td>9.0</td>
<td>8.7</td>
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<tr>
<td>2006</td>
<td>9.8</td>
<td>8.6</td>
<td>9.0</td>
<td>8.6</td>
</tr>
<tr>
<td>2007</td>
<td>9.7</td>
<td>8.5</td>
<td>9.0</td>
<td>8.5</td>
</tr>
<tr>
<td>2008</td>
<td>9.6</td>
<td>8.4</td>
<td>9.0</td>
<td>8.4</td>
</tr>
<tr>
<td>2009</td>
<td>9.5</td>
<td>8.3</td>
<td>9.0</td>
<td>8.3</td>
</tr>
</tbody>
</table>

**Three year moving average, 2001 to 2010.**

- England and Wales are both showing evidence of a downward trend in alcohol intake.

- Intake in Scotland has fluctuated since 2001 with no clear trend, whilst Northern Ireland has stabilised following a period of increase.

- Between 2002 and 2010 alcohol intake fell 37% in Wales, 7.5% in England and 4.2% in Scotland, whereas in Northern Ireland intake increased by 10%.

- During the period 2008 to 2010 average alcohol intake was highest in the North West and lowest in London.

- The Department of Health is responsible for Government health policy on alcohol misuse. Regularly drinking above the recommended daily limits for lower risk drinking of 2-3 units for women and 3-4 units for men significantly increases the risk of ill health.

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19 Three year moving average, 2001 to 2010.
7.1: Trend in the estimated number of cases of foodborne illnesses in England and Wales

- Listeria leads to more deaths than salmonella and E.coli combined. In 2010, estimated cases of listeria fell to 300 from a peak in 2007 of 500, but remain 50% higher than in 2000. The reason for a drop in listeriosis cases is unclear.

- Estimated cases of campylobacter increased to 403,500 cases in 2010, now 12% higher than in 2000.

- The downward trend in salmonella continued in 2010 with an estimated 22,500 cases, 46% fewer than in 2000. Control of salmonella in eggs and poultry and improved hygiene throughout the food chain are thought to have contributed significantly to this reduction.

- Cases of E.coli decreased 22% between 2009 and 2010 to an estimated 900 cases, now 10% lower than in 2000.

- Foodborne illness is caused by contamination by microorganisms or the toxins they produce. Due to lack of precision, the underlying data is rounded to the nearest 100 cases.

Source: Food Standards Agency / Health Protection Agency (HPA), 2012.

1 Estimates for 2001 and 2002 are not available. Estimates are of cases occurring in the community, as opposed to lab-confirmed reported cases. Salmonella, campylobacter, E. coli O157 and Listeria monocytogenes have been identified by the FSA as the four major pathogens.
Safety & Confidence

7.2: Inspections and enforcement actions of food businesses to 2010-11

Source: Food Standards Agency Board paper on monitoring of food law enforcement activity, 2011.

- Some 186,050 formal enforcement actions were carried out in 2010-11, a rise of more than 10% on 2009-10.

- There were 587,890 food establishments under Local Authority (LA) control at 31 March 2011.

- There were 557,262 food hygiene and food standards interventions carried out by LAs in 2010-11.

- 5.9% (33,883) food establishments were not yet risk rated in 2010-11 – a reduction from 6.8% in 2009-10.

- The level of broad compliance and above\(^2\) was 88.9%, an increase of 1.5% from the figures reported in 2009-10.

- There were 290,934 inspections for food hygiene and 94,516 inspections for food standards in 2010-11.

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\(^2\) Equivalent to the top three tiers of the National Food Hygiene Rating Scheme; a partnership scheme between FSA and LAs in England, Wales and N. Ireland, launched in 2010. Following inspection, hygiene standards are rated on a scale of 0 to 5 where 5 is the highest standard and 0 means urgent improvement is required. A parallel scheme exists in Scotland.
7.3: Contamination incidents investigated in the UK by the Food Standards Agency (FSA) by type

- In 2011, the FSA investigated 1,714 food and environmental incidents in the UK, 209 more than in 2010.

- Natural chemical contamination incidents rose 25% in 2011. Increased testing of peanuts at border inspection points may explain this increase.

- Allergen incidents rose 44% in 2011 to 114 compared to 79 recorded in 2010. Those relating to milk increased from 9 to 27 largely due to cross-contamination issues of plain chocolate with milk chocolate.

- Microbiological contamination shows a continual increase since 2006, having risen 91% to 281 incidents in 2011, now making 16% of all incidents.

- Environmental contamination; 356 incidents, predominantly related to fires.

- The FSA dealt with seven high level incidents in 2011, including the implications of the Fukushima nuclear emergency and outbreaks of E.coli in Germany and France.

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3 'Other’ includes food contact materials, veterinary medicines, use of unauthorised ingredients, pesticides etc. Microbiological contamination is the main cause of food poisoning.
7.4: Number of adverse samples found in imported food by type, 2010-11

<table>
<thead>
<tr>
<th>Category</th>
<th>Adverse Samples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-permitted GMO*</td>
<td>3</td>
</tr>
<tr>
<td>Heavy metals</td>
<td>3</td>
</tr>
<tr>
<td>Microbiological contamination</td>
<td>10</td>
</tr>
<tr>
<td>Contaminants</td>
<td>16</td>
</tr>
<tr>
<td>Irradiation</td>
<td>26</td>
</tr>
<tr>
<td>Mycotoxins</td>
<td>27</td>
</tr>
<tr>
<td>Food contact materials</td>
<td>48</td>
</tr>
<tr>
<td>Labelling and claims</td>
<td>80</td>
</tr>
</tbody>
</table>

Source: Key Findings of the Imported Food Sampling & Surveillance Grants 2009/10 (FSA).
*Genetically Modified Organism

- Samples taken as part of this programme are targeted towards areas of known or suspected risk. As a result, it is expected that rates of non-compliance would be higher than those taken as part of randomly-selected foods.

- During the 2010-11 programme, a total of 4836 samples were submitted for testing.

- ‘Labelling and claims’ and ‘food contact materials’ produced the highest number of adverse samples found in imported foods in 2010-11.

- As seen in previous years, Asia was the source continent of the highest number of non-compliances (60%), with the majority of these samples originating from China, India and Thailand.

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4 Sampling was targeted at foods most likely to be affected by the specific areas of concern e.g. nut products were tested for mycotoxins.

5 ‘Labelling claims’ excludes general checks carried out by public analysts but includes nutritional composition and claims such as ‘organic’ where a chemical analysis is required to test the claim. ‘Food contact materials’ covers migration of primary aromatic amines from kitchen utensils, phthalates from jar lids and formaldehyde from melamine ware.
7.5: Trend in the value of food with the Red Tractor logo

Source: Assured Food Standards (AFS).

- Over 78,000 farms in the UK are now part of the Red Tractor Assurance scheme, along with livestock markets, hauliers and food supply businesses. The scheme sets effective, internationally recognised production standards to various product sectors and through the supply chain covering food safety, animal welfare and environmental protection.

- Yearly increases have seen the value of sales of food with the Red Tractor logo rise to £12 billion in 2011-12. Total consumer expenditure on food and drink was £179 billion in 2011, see Chart 1.3.

- Freedom Food is the RSPCA’s farm assurance and food labelling scheme. It is the only UK farm assurance scheme to focus solely on improving the welfare of farm animals reared for food and covers the whole of the animal’s life from birth to slaughter.

- LEAF\(^6\) is a registered charity supporting farmers to produce foods whilst also caring for the environment. Defra has named the LEAF Marque as the standard to which all Government Departments and Agencies must adhere in their procurement of food.

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\(^6\) Linking Environment And Farming. For more information see: www.leafuk.org/leaf/home.eb
7.6: Spontaneous understanding of the term ‘food security’

- Defra’s definition of food security is for all consumers to have access at all times to sufficient, safe and nutritious food for an active and healthy life at affordable prices.

- Understanding of the term ‘food security’ had little resonance with the general public.

- In a survey\(^7\):
  - two thirds of respondents could not provide an answer,
  - 4% of respondents linked the term to the availability of enough food to feed the population and
  - 75% of respondents had no recollection of the food security topic being discussed in the media.

- Concerns about UK and international food security stem from security of key inputs such as energy and water, potential impact of global climate change and the recent economic crisis and current recession.

\(^7\) A representative sample of UK adults numbering 1,014 between July 2009 and July 2010.
The main food issue of concern to people is food prices, with 63% concerned in May 2012, an increase from 60% in November 2011.

The second highest food concern was the amount of salt in foods, with 49% of respondents concerned in May 2012.

There was an increased level of concern in almost all food issues between November 2011 and May 2012. Large increases included:
- amount of fat in food – up from 40% to 45%,
- amount of sugar in food – up from 38% to 42%,
- food aimed at children – up from 23% to 27% and
- food miles – up from 19% to 23%.

Food prices, salt, waste, fat, saturated fat, sugar and animal welfare are the food issues where more than 40% of people are concerned.

Source: Biannual Public Attitudes Tracker, (FSA).
People in Greece and Portugal are very concerned about their national food security. 94% of those polled in Greece and 85% of those polled in Portugal expressed concern.

People in Netherlands, Denmark, Sweden and Germany are less concerned about national food security.

Across the EU (most Member States) 76% expressed concern that sufficient food is produced to meet the needs of the world’s population.

Across the EU (most Member States) 43% expressed some degree of concern that sufficient food is produced to meet the needs of their country.

In 17 out of the 27 Member States the proportion of respondents who are not concerned about food production in their own country is greater than the proportion of those who are concerned.

**Source:** Europeans’ attitudes towards food security, food quality and the countryside; European Commission, 2012.

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8 A survey of 26,593 respondents across the 27 Member States of the European Union between 10th and 25th March 2012.
The title for each organisation provides a link to its homepage.

1. Food Standards Agency (FSA)

Biannual Public Attitudes Tracker Survey
www.food.gov.uk/science/socsci/surveys/publictrackingsurvey


Imported Food Sampling and surveillance Grants
http://www.food.gov.uk/foodindustry/imports/enforce_authorities/samplingandsurveillance/

2. NHS Information Centre for health and social care

Health Survey for England, 2010

3. Department of Health

Dietary Reference Values for Food Energy and Nutrients in the UK, 1991

The Eatwell Plate
http://www.nhs.uk/Livewell/healthy-eating
Data sources

4. Department for Environment, Food and Rural Affairs (Defra)

Living Costs and Food Survey (LCFS)
http://www.defra.gov.uk/statistics/foodfarm/food/familyfood/

June Survey of Agriculture and Horticulture

Agriculture in the United Kingdom

Food Transport Indicators

Total Factor Productivity of the UK Food Chain

Attitudes and behaviours around sustainable food purchasing

UK Food security assessment, January 2010

Environmental Statistics
http://www.defra.gov.uk/statistics/environment/

British Survey of Fertiliser Practice
Data sources

5. Department of Energy and Climate Change (DECC)

Digest of United Kingdom Energy Statistics

Energy Consumption in the UK

6. Office for National Statistics (ONS)

Annual Business Survey (ABS)
http://www.ons.gov.uk/ons/publications

Labour Market Trends


Consumer Tends

Consumer Price Indices

Annual Survey of Earnings and Hours (ASHE)

Business Demography, Enterprise births, deaths and survivals
UK Environmental Accounts
http://www.ons.gov.uk/ons/taxonomy/index.html?nscl=Agriculture+and+Environment

Family Spending 2011

7. The Co-operative Bank

Ethical Consumerism Report, 2011

8. Institute of Grocer Distribution (IGD)

ShopperVista 2012

9. Assured Food Standards (AFS)

The Red Tractor Scheme
http://assurance.redtractor.org.uk/rtassurance/global/home.eb

10. Kantar Worldpanel

11. Horizons for Success

Foodservice database
http://www.hrzns.com/services/database

QuickBite Survey
http://www.hrzns.com/services/quickbite
12. Waste Resource Action Programme (WRAP)

Press releases

Federation House Commitment

13. Food and Agriculture Organisation of the United Nations (FAO)

FAOSTAT

14. International Grains Council (IGC)


15. United Nations (UN)

United Conference on Trade & Development (UNCTAD)
http://unctad.org/en/Pages/Home.aspx

16. The Organisation for Economic Co-operation and Development (OECD)

Health at a Glance 2011-2018

17. The World Bank

Global Economic Prospects, June 2012
Data sources

Food Price Volatility, a growing concern: World Bank stands ready to respond, July 2012

18. United States Department of Agriculture (USDA)
Foreign Agricultural Service

Households Below Average Income (HBAI)

20. Scientific Advisory Committee on Nutrition

21. European Commission (EC)
Eurostat

Europeans’ attitudes to food security, food quality and the countryside, 2012

22. Institute for Fiscal Studies
Living Standards, Poverty and Inequality in the UK, 2012
http://www.ifs.org.uk/publications/6196

23. HM Revenue and Customs (HMRC)

24. Health Protection Agency (HPA)
Chief Scientist Report
Data sources


25. Linking Environment and Farming (LEAF)